



WINE INTELLIGENCE
IRELAND WINE LANDSCAPES
2021

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REPORT BROCHURE

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INTRODUCTION



It seems strange to sound a positive note about the COVID pandemic of 2020 in the context of anything, let alone the wine business in Ireland. As with other markets, Ireland's economically significant hospitality and tourism industries have been decimated by lockdown restrictions and lack of air travel over the past year, and the effects of this crisis will be felt in bars, pubs and restaurants throughout the nation for some time to come. The consensus amongst market experts is that it will take 3-5 years for Ireland's restaurant trade to recover from COVID, assuming lockdown restrictions are eased by the middle of the year.

And yet at the same time, Ireland's wine trade has largely weathered the storm, and, in some cases, seen remarkable business growth. Importers and distributors with the agility to pivot away from on-trade distribution towards retail channels and their own direct-to-home business have had a good year, as have those who have worked positively with hitherto successful restaurant businesses to set up pop-up wine and food retail or takeaway & delivery businesses.

More fundamentally, Ireland's wine drinkers have used the enforced stay-at-home rules to indulge in their wine habits. While the whole story in terms of wine sales in 2020 is still to be written, the anecdotal evidence suggests that the category experienced no overall loss of volume because of the shuttering of the on-trade – if anything, the market may have expanded in volume terms in 2020. At the same time, the trade is reporting increased interest in higher value wines, and also in more diverse styles and origins. Trade respondents mentioned that their Pet-Nat, organic and natural wines have been moving well in recent

months, as has their more special interest products from lower volume Old World exporters such as Portugal, Germany, Austria and Greece.

In the mainstream retail channels, Chile remains top dog, with leading brands Santa Rita and Casillero del Diablo consolidating their hold, along with Australian brands Wolf Blass, Yellow Tail and McGuigan. New Zealand is also a success story in 2020, with Villa Maria gaining significant ground in awareness on market leader Oyster Bay. Brands appear to have benefited from government legislation outlawing the use of deep discount multibuy promotions, and the legislation allocating specific areas of supermarket floorspace to alcohol. In the eyes of some trade observers, this has led to a more conducive shopping experience, with underlying product and brand values given more opportunity to shine.

Ultimately, perhaps, 2020 was the year of the online shopper in Ireland. While this group remains a small (but growing) minority of consumers, it corresponds to the high earning, high spending, educated urbanites who are increasingly influential in Ireland's economy generally, and particularly in the wine trade. These consumers typically did not suffer much economically during COVID, and have been sitting on unspent holiday and going out budgets, and in many cases they have applied them to buying more interesting and expensive wines online, including Champagne which staged something of a comeback in late 2020 according to several sources. Trade opinion is divided on the extent to which consumers will remain loyal to the online channel post-lockdown, but agree that Ireland's wine drinkers are going to emerge from the pandemic as more educated and thoughtful consumers of the category.

CONSUMERS ARE SPENDING MORE ON WINE

The premiumization trend was not interrupted by the Covid-19 pandemic as consumers state higher average spend across most occasions

While consumers are stating higher spending across most occasions in both the on-trade and off-trade, significantly less regular wine drinkers see “wine as an expensive drink”

“I agree that, generally speaking, wine is an expensive drink”

2019	2020
34%	29% ↓



Spend by occasion: **Tracking**

Average stated spend per bottle
Base = Those who drink wine on each occasion

- Off-trade
- On-trade

	2017	2020	Tracking
At a more formal dinner in a restaurant	€ 10,44	€ 10,88	→
As a gift for somebody	€ 9,99	€ 10,61	↑
At a party / celebration / big night out	€ 9,53	€ 10,26	↑
A relaxing drink out at the end of the day	€ 7,85	€ 8,33	↑
At a lunch break in a restaurant	€ 7,66	€ 7,97	→
With a more formal dinner party at home	€ 6,12	€ 6,61	↑
At a party / celebration at home	€ 6,14	€ 6,57	↑
A relaxing drink at the end of the day at home	€ 4,18	€ 4,46	→
With an informal meal at home	€ 3,76	€ 4,17	↑

Methodology note: values were stated by consumers, therefore they refer to how consumers believe they behaved and may not be a precise reflection of the market. Consumer stated frequency and spend should be analysed relatively rather than in absolute

WHAT DO MARKET EXPERTS SAY?

“Consumers now buy better wines in supermarkets and shops, to compensate going less to restaurants”

Distributor

“In times of crisis, wine is seen as a little luxury, especially when consumers have to stay at home”

Large producer

“We see consumers restocking the premium wines they like to save for special occasions”

Distributor

↑ / ↓ : Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level

Sources:

- Wine Intelligence, Vinitrac® Portugal, Oct’17, Oct’19 and Oct’20 (n ≥ 1,000) Portuguese regular wine drinkers
- Wine Intelligence trade interview programme 2020-21 (n = 8)

EXAMPLE SLIDE: WINE CONSUMPTION FREQUENCY



An uptick in more frequent wine consumers over the past 6 years aligns with the increasing proportion of older consumers in the wine drinking population

Wine consumption frequency: Tracking

% who usually drink wine at the following frequency
Base = All Irish regular wine drinkers (n>=1,000)

	2014	2018	2019	2020	Tracking		
	n= 1,020	2,000	1,000	1,000	vs. '14	vs. '18	vs. '19
Most days / every day	5%	6%	7%	8%	↑	↑	→
2-5 times a week	31%	32%	31%	35%	→	→	→
About once a week	38%	34%	34%	34%	→	→	→
1-3 times a month	26%	28%	27%	23%	→	↓	↓

Wine consumption frequency by age

% who usually drink wine at the following frequency
Base = All Irish regular wine drinkers (n=1,000)

	All Irish regular wine drinkers n= 1,000	Age groups					
		18-24	25-34	35-44	45-54	55-64	65+
Most days / every day	8%	3%	4%	5%	5%	9%	17%
2-5 times a week	35%	33%	31%	33%	31%	37%	42%
About once a week	34%	33%	38%	37%	40%	31%	26%
1-3 times a month	23%	31%	28%	25%	24%	23%	15%

Red / Blue: Statistically significantly higher / lower than all regular wine drinkers at a 95% confidence level

↑ / ↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level

Source: Wine Intelligence, Vinitrac® Ireland, Dec'14, Jul+Oct'18, Oct'19, & Oct'20, (n>=1,000) Irish regular wine drinkers

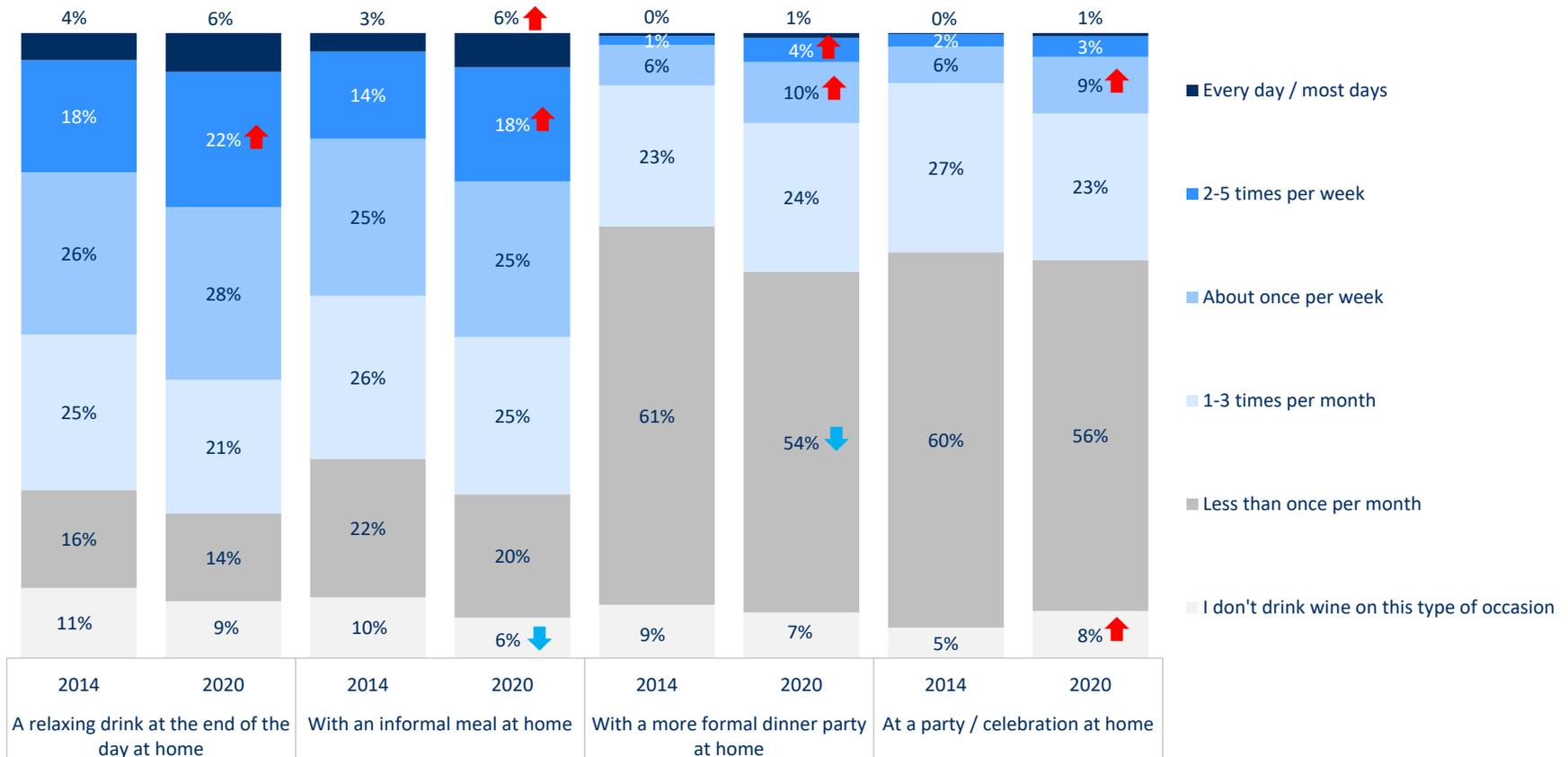
EXAMPLE SLIDE: OFF-TRADE: WINE CONSUMPTION FREQUENCY BY OCCASION



The proportion of Irish wine drinkers consuming wine on a weekly basis for a variety of at-home occasions has significantly risen since 2014

Off-trade: Wine consumption frequency by occasion: Tracking

Base = Those who buy wine in the off-trade



↑ / ↓ : Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
 Source: Wine Intelligence, Vinitrac® Ireland, Dec'14 & Oct'20, (n>=1,000) Irish regular wine drinkers

RESEARCH METHODOLOGY: QUANTITATIVE



The data for this report was collected in Ireland in December 2014, July+October 2018, October 2019, and October 2020

December 2014, July+October 2018 and October 2019 were tracked against October 2020

Data was gathered via Wine Intelligence's Vinitrac® online survey

Respondents were screened to ensure that they drink wine at least once a month; drink red, white or rosé wine; and buy wine in the off-trade or in the on-trade

Invalid respondents (those who sped through the survey or gave inconsistent answers to selected questions) were removed before analysis

The data is representative of Irish regular wine drinkers in terms of gender and age

The distribution of the sample is shown in the table:

	n=	Dec-14 1,020	Jul-18+Oct-18 1,000	Oct-19 1,000	Oct-20 1,000
Gender	Male	50%	50%	48%	48%
	Female	50%	50%	52%	52%
	Total	100%	100%	100%	100%
Age	18-24	10%	5%	8%	8%
	25-34	22%	18%	18%	18%
	35-44	21%	21%	19%	19%
	45-54	16%	18%	16%	16%
	55-64	23%	16%	14%	14%
	65 and over	7%	21%	24%	24%
	Total	100%	100%	100%	100%

Source: Wine Intelligence, Vinitrac® Ireland December 2014 (n=1,020), July+October 2018 (n=2,000), October 2019 (n=1,000), and October 2020 (n=1,000) Irish regular wine drinkers

Other sources in the report include Wine Intelligence market experience, secondary sources and trade interviews.

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