WINE INTELLIGENCE

UK WINE LANDSCAPES

DECEMBER 2021

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INTRODUCTION

A year after the UK started recovering from the first Covid-19 wave, what has changed?

In some respects, not much. Wine category attitudes, knowledge, confidence, relationships with brands are fairly consistent with last year's observations. There is some evidence that younger wine drinkers are returning to the on-trade, but the reduction in on-trade participation caused by the 2020-21 lockdowns does not appear to have recovered.

The population of regular UK wine drinkers has also continued to grow older, and at a faster pace than the overall population of the United Kingdom. Why? In the short term, the pandemic drove younger consumers away from the wine category and towards other beverages, as their main wine drinking occasions were in social settings, and often on-trade locations.

However there appear to be longer-run trends at work. A growing interest in health and wellbeing could be a contributor to the shrinking of the regular wine drinking population and its age distribution. Gen-Z of legal-drinking age and Millennials a fare more likely to be abstaining from alcohol altogether, or actively moderating their consumption, compared with older consumers. This phenomena also boosts demand for no- and low-alcohol products and should continue to gradually shape the market.

Channel preference has remained broadly similar over the past year, with a few exceptions. After a COVID-related boost in 2020, e-commerce use has remained stable, with channels like supermarket and wine producer websites consolidating and delivery apps gaining grounds. Retail shopping continues to suffer whilst hard discounters have made a come back.

Alternative packaging formats are becoming increasingly popular, supported by younger generations who are more inclined towards alternative packaging types. Canned wine is the rising star amongst various alternative packaging types, resulting from increasingly available options and enhancing quality. Expect sustainability pressures to further boost interest in alternative packaging.

More than ever, English wine is in the spotlight. Benefiting from a multitude of socio-economic factors, and a Covid-era desire to buy local and support local businesses, awareness and purchase rates of English wine have risen. As its reputation continues to grow, English sparkling is increasingly seen as an alternative to Champagne; a trend which is expected to prosper in the next few years.

EXAMPLE SLIDE: PER CAPITA CONSUMPTION OF STILL LIGHT WINE

wine intelligence

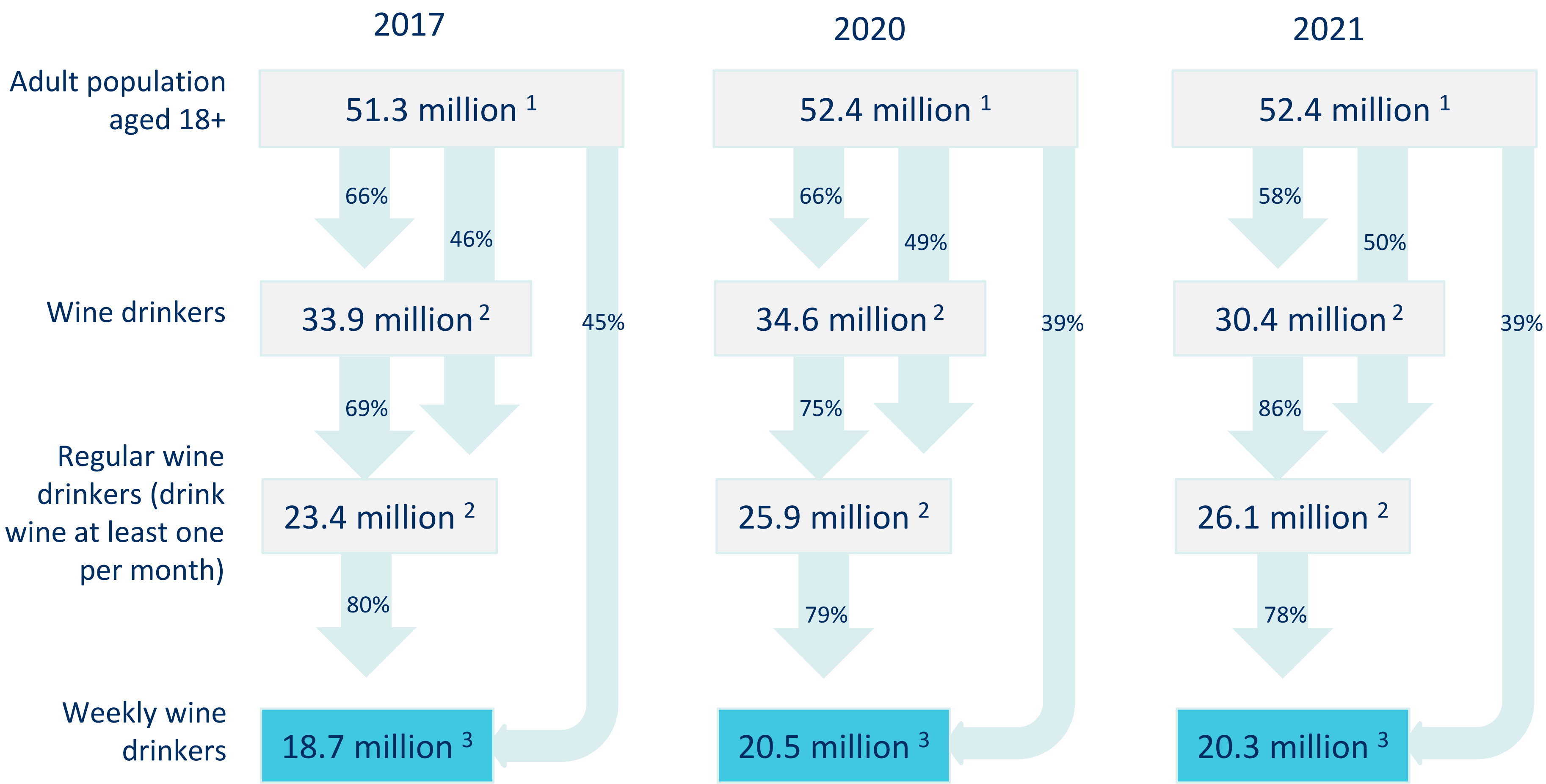
Net increase of per capita wine consumption between 2019 and 2020,
similar observation with other mature wine markets such as Argentina and Sweden

Per capita consumption of **still light wine** (red, white and rosé wine) in litres per annum

	Market	2016	2017	2018	2019	2020	CAGR 16-20	CAGR 19-20
1	Italy	37.6	38.5	38.2	37.2	35.8	-1.2%	-3.8%
2	Portugal	39.1	40.6	39.8	39.7	33.2	-4.0%	-16.3%
3	Slovenia	35.6	36.0	36.1	36.4	31.1	-3.3%	-14.6%
4	Switzerland	32.3	31.7	31.2	30.9	30.6	-1.4%	-1.1%
5	Montenegro	34.8	34.7	34.5	34.5	30.2	-3.5%	-12.4%
6	France	35.1	34.6	33.3	32.2	29.2	-4.5%	-9.4%
7	Denmark	26.9	26.3	25.7	26.0	26.5	-0.3%	2.0%
8	Austria	27.7	27.3	27.1	26.9	26.4	-1.2%	-1.9%
9	Hungary	25.9	26.1	26.3	26.4	25.5	-0.3%	-3.4%
10	Germany	24.7	24.7	24.0	23.9	24.6	-0.1%	2.9%
11	Greece	26.8	27.2	27.7	27.9	21.0	-5.9%	-24.7%
12	Uruguay	19.2	18.8	18.8	18.4	20.5	1.6%	11.3%
13	Argentina	20.9	20.2	19.2	19.0	20.3	-0.7%	6.7%
14	Romania	17.3	20.5	25.0	18.9	19.9	3.7%	5.6%
15	US Virgin Islands	23.4	24.1	24.5	23.3	19.7	-4.2%	-15.3%
16	Sweden	18.1	17.9	17.9	17.8	19.3	1.6%	8.4%
17	Slovakia	19.5	19.2	19.3	19.1	18.7	-1.0%	-2.1%
18	Netherlands	19.5	19.5	19.1	18.7	18.3	-1.6%	-2.1%
19	Serbia	17.5	17.7	18.1	18.1	17.9	0.6%	-1.4%
20	Australia	19.9	19.6	18.9	18.5	17.8	-2.7%	-3.6%
27	United Kingdom	16.5	16.0	15.5	15.0	15.8	-1.1%	5.1%

EXAMPLE SLIDE: CHANGES IN THE UK WINE DRINKING POPULATION

Covid helped recruit 2.5 million new wine regular wine drinkers in the UK after years of long-term decline in this population; these drinkers appear to have stayed in the category through 2021



[1] 1 ONS, estimates
[2] Wine Intelligence estimates based on online calibration studies with Opinium, UK adults 18+.Wine=still light wine (red, white, rosé)
[3] Wine Intelligence, Vinitrac® UK, 2017 (n=1,005), October 2020 (n=1,012) and October 2021 (n=3,006) UK regular wine drinkers

EXAMPLE SLIDE: WINE CONFIDENCE AND KNOWLEDGE INDEX

Wine confidence and knowledge have remained stable since 2017

Wine **knowledge** index: Tracking

Wine knowledge index (0-100) is calculated based on consumer-reported awareness of wine-producing countries, wine-growing regions and wine brands
Base = All UK regular wine drinkers (n≥1,000)

Group	2017	Index change	2021
All UK regular wine drinkers	42.0	-0.9	41.1

Wine knowledge index is the **"objective"** measurement of consumer knowledge about wine

Wine **confidence** index: Tracking

Wine confidence index (0-100) is calculated based on the extent to which consumers feel competent about their wine knowledge
Base = All UK regular wine drinkers (n≥1,000)

Group	2017	Index change	2021
All UK regular wine drinkers	52.4	-0.1	52.2

Wine confidence index is the **"subjective"** measurement of consumer confidence about their wine knowledge

Wine confidence index uses consumers' answers to three attitudinal statements:

1. I feel competent about my knowledge of wine
2. Compared to others, I know less about the subject of wine
3. I don't understand much about wine

↑ / ↓ : Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac® UK, Jul'17, (n=1,000) and Oct'21, (n=3,006) UK regular wine drinkers

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