THE UK WINE MARKET LANDSCAPE REPORT EXTRACT FOR DWI MEMBERS

November 2015

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Registered in England as a limited company number: 4375306

Introduction

“Overall it suggests a market trending towards quality over quantity”

As the UK steadily progresses on its path towards economic recovery, so also do the effects of the “feel-good factor”, mentioned in last year’s UK Landscapes report, which continue to have their beneficial effect on the UK wine-drinking market. This, however, has not translated itself into an increase in the number of wine drinkers since the figures have remained the same as last year and there has even been a decrease in overall consumption volume. The improvement shown in this year’s UK Landscapes report, however, is visible in the significant changes in the quality of the average wine-drinker’s beverage repertoire and in UK consumer spending both in the on- and off-trade. Overall it suggests a market trending towards quality over quantity.

Sparkling wines are performing exceptionally well in the UK market, with consumption figures increasing year-on-year and no sign of their losing their fizz. Although Champagne remains the nation’s favourite sparkling wine, the clear leader is the Italian sparkling wine, Prosecco, which has gained over 4 million drinkers since 2013. What is more, it is at the top of the list in terms of purchase and in successfully converting awareness into purchases. Therefore, it is not surprising to see the imports of Prosecco almost double between 2013 and 2014.

The rise of sparkling wine has taken its toll on the white and rosé wine categories, which are losing popularity amongst the UK regular wine drinkers. Similarly, beer and cider also seem to be losing part of their popularity in favour of the sparkling category.

Introduction

“Last but most important, this year’s report highlights the opportunities that lie within the Millennial segment”

The general positive feeling amongst UK wine consumers is also reflected in their spending in both the off- and on-trade. In the UK, we are seeing more people choosing to go out to pubs and restaurants and also willing to spend more on a bottle, particularly on a more formal dinner or at a party/big night out. Moreover, many more off-trade consumers are willing to spend over £10 on a bottle of wine across all occasions but primarily on a bottle as a gift for someone else or to go with a formal dinner. This positive change in spending can be explained by a rise in average income, a stronger and more advantageous exchange rate for the pound, or maybe wine is just looking relatively cheap for consumers? It’s worth noting a takeaway sandwich today can be as expensive as a bottle of wine.

In this report we continue to see the much talked-about rise of discounter outlets such as Lidl, but there has also been a long-term increase in those choosing to buy wine from independents. This is perhaps in response to supermarket giants reducing their ranges, thus leading consumers seeking more choice to turn to alternatives. The internet and smartphones are also playing an increasing role in UK wine sales predominantly amongst younger consumers with 18% of those aged 25-34 having bought wine online in the past 6 months, compared to 5% of those aged 45-54.

Last and most importantly, this year’s report highlights the opportunities that lie within the Millennial segment (those younger than 35) who make up just over a quarter of the UK regular wine drinkers and are more adventurous in their wine drinking. Unlike the older generations, they are more experimental and willing to try new wines from lesser-known wine regions and also niche varietals. Over the coming years, the Millennial generation will become the largest population in the UK and will be the driving force behind wine consumption trends.

Luis Osório
Senior Research Analyst
Wine Intelligence

Management summary

Market size

1 Volume

- The UK is the second largest imported wine market in the world, having consumed 123 million cases of still light wine in 2014. In comparison, the US is the largest wine market in the world, but the imported wine has a share of only 25% - 79 million cases.
- There are 29.6 million regular wine drinkers (drinking at least once a month) in the UK

2 Growth

- Like most of the established and mature markets, the UK wine market has negative growth rates in volume (CAGR 2010-14 = -2.15%). This seems to be balanced with higher spending per capita both on- and off-premise
- The UK has a relatively high consumption per capita of 21 litres, though this has fallen steadily from a high of around 26 litres in 2010

3 Potential

- Currently, 59% of UK adults are regular wine drinkers. Compared to the reach in other markets such as the US (40%), there is not much room left for the wine category to grow in the UK
- As opposed to still light and fortified wine, sparkling wine has been growing consistently in the last years (CAGR 2010-14 =8%) mostly driven by the rise of Prosecco, which is now consumed by 43% of the UK regular wine drinking population, an increase of 4 million since 2013

Sources:

- IWSR 2014 ©Copyright 2015 – The IWSR
- Wine Intelligence online calibration studies with YouGov, June'14, n=2,341 UK adults and Sep '11, n=2,053 UK adults . Wine=still light wine (red, white, rosé)
- World Bank 2014
- Wine Intelligence, Vinitrac® UK, June '15, n=1,000 UK regular wine drinkers

Management summary
Consumer behaviour

1
Shifting preferences
- Beverage repertoires are shifting in the long-term as beer seems to be giving way to Champagne and Prosecco
- Traditionally dominant countries of origin and varietals are losing favour as others are approaching

2
Awareness of German wines
- Not even 1 out of 4 of all UK regular wine drinkers are aware of Germany as a wine producing country
- However, more than 2 out of 3 who have heard about Germany as a wine producing country have drunk German wine in the past 6 months
- Riesling and Pinot Noir continue to be on the Top 5 of grape varieties that have been drunk in the past 6 months

3
Channel and retailer usage
- While supermarket usage remained stable a lot of other channel usage increased significantly in the long-term. Discount stores are now used by 35% of all UK regular wine drinkers
- While Tesco usage declined significantly in the long-term, Sainsbury's, among other retailers, increased significantly

4
Off-trade behaviour
- Wine is being drunk more frequently as a relaxing drink at the end of the day at home, with a more formal dinner party at home and with a party/celebration at home
- Significant changes in spend appear to be afoot: a quarter of regular drinkers say they spend over £10 on wine as a gift (2013: 16%) while 36% spend more than £6 on a bottle for an informal meal at home, up from 24% in 2013

5
Choice cues
- The importance of recommendations, brands and the appeal of the bottle/label design increased significantly in the long-term

Sources:
- Wine Intelligence, Vinitrac® UK, June '15, n=1,000 UK regular wine drinkers

UK wine market

Macro trends

The UK is an established market with **39.1 million wine drinkers** [1] and a total **volume of 137m 9l cases**[2]

MATURE

ESTABLISHED

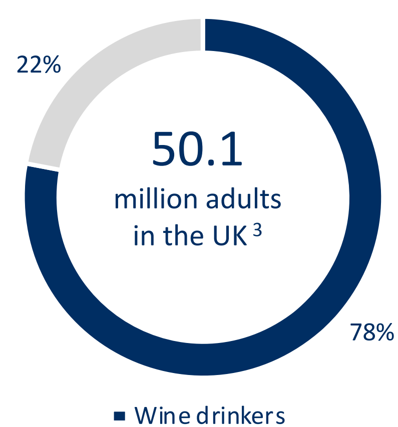
GROWTH

EMERGING

NEW EMERGING

Since 2010, still light wine has declined at a of rate of **-2%**[2] CAGR, while sparkling wine has grown by **8%**[2] CAGR

Established wine culture
Annual per capita consumption of 21l



World's 6th largest wine market
Volume of sparkling wine is growing

Imported wine dominates
Lead by Australia with 20% market share

Sources:

1 Wine Intelligence online calibration studies with YouGov, June'14, n=2,341 UK adults and Sep '11, n=2,053 UK adults . Wine=still light wine (red, white, rosé)

2 IWSR 2015

3 ONS 2011

4 IWSR 2014 ©Copyright 2015 – The IWSR

UK wine market

Consumption trends in the UK 2015 vs. 2013

Top alcoholic beverages

% who have drunk the following beverages in the past 6 months

White wine	Red wine	Beer	Rosé	Champagne
80% (81%) →	74% (72%) →	55% (63%) ↓	53% (55%) →	46% (41%) ↑

Top countries of origin

% who have drunk wine from the following countries in the past 6 months

France	51% (56%)	↓
Australia	47% (52%)	↓
Italy	42% (38%)	↑
Spain	40% (40%)	→
South Africa	36% (40%)	→

Top red varietals

% who have drunk the following varietals in the past 6 months

1	Merlot	52% (57%)	↓
2	Cabernet Sauvignon	45% (51%)	↓
3	Shiraz/Syrah	40% (44%)	→
4	Pinot Noir	33% (34%)	→
5	Malbec	20% (16%)	↑

Top white varietals

% who have drunk the following varietals in the past 6 months

1	Sauvignon Blanc	55% (55%)	→
2	Pinot Grigio/Gris	53% (54%)	→
3	Chardonnay	52% (61%)	↓
4	Chenin Blanc	24% (27%)	→
5	Riesling	19% (18%)	→

Source: Wine Intelligence, Vinitrac® UK, Aug '13, n=1,019, June '15, n=1,000 UK regular wine drinkers

↑: statistically significantly higher than 2014 at a 95% confidence level

↓: statistically significantly lower than 2014 at a 95% confidence level

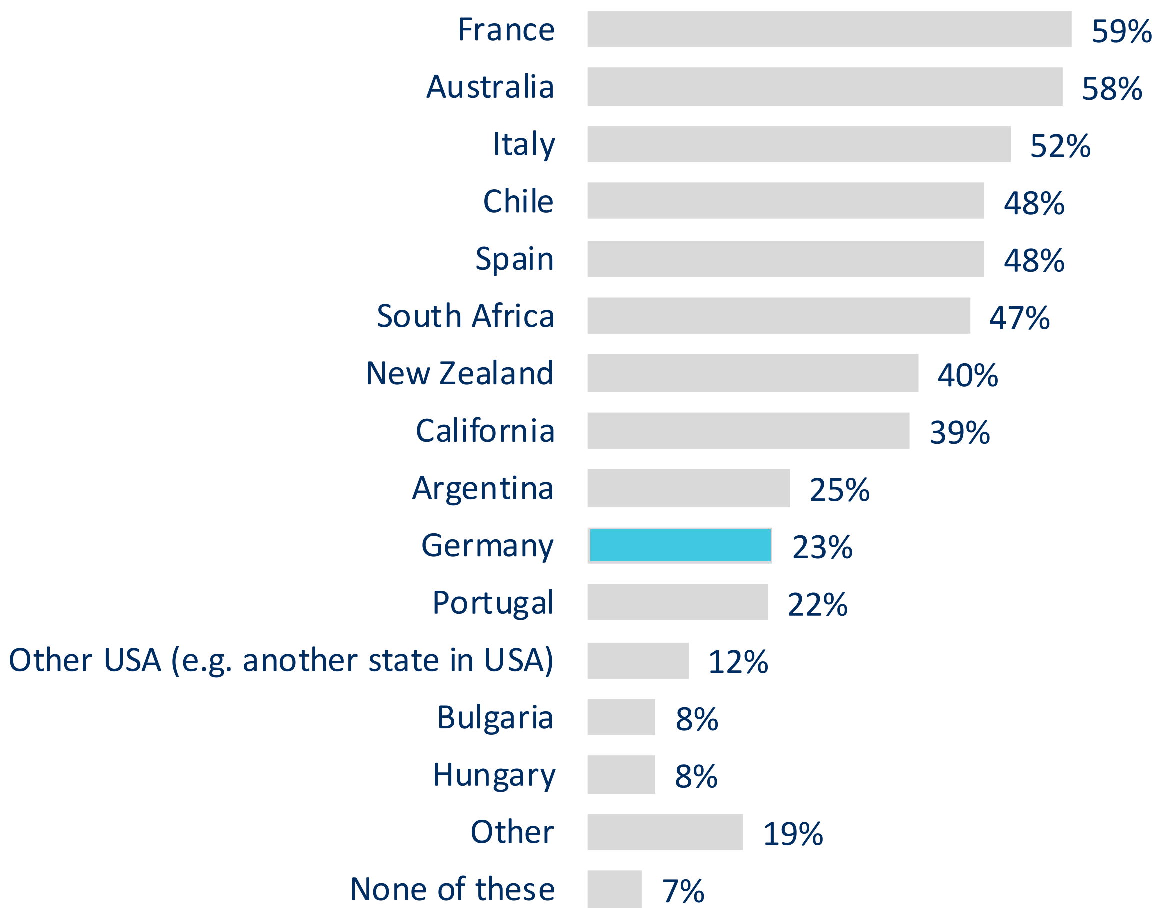
() = represents data in 2014

Country of origin awareness

Not even 1 out of 4 of all UK regular wine drinkers are aware of Germany as a wine producing country

Country of origin awareness

% who have heard of the following wine producing countries
Base = All UK regular wine drinkers (n=1,000)



Source: Wine Intelligence, Vinitrac® UK, June '15, n=1,000 UK regular wine drinkers

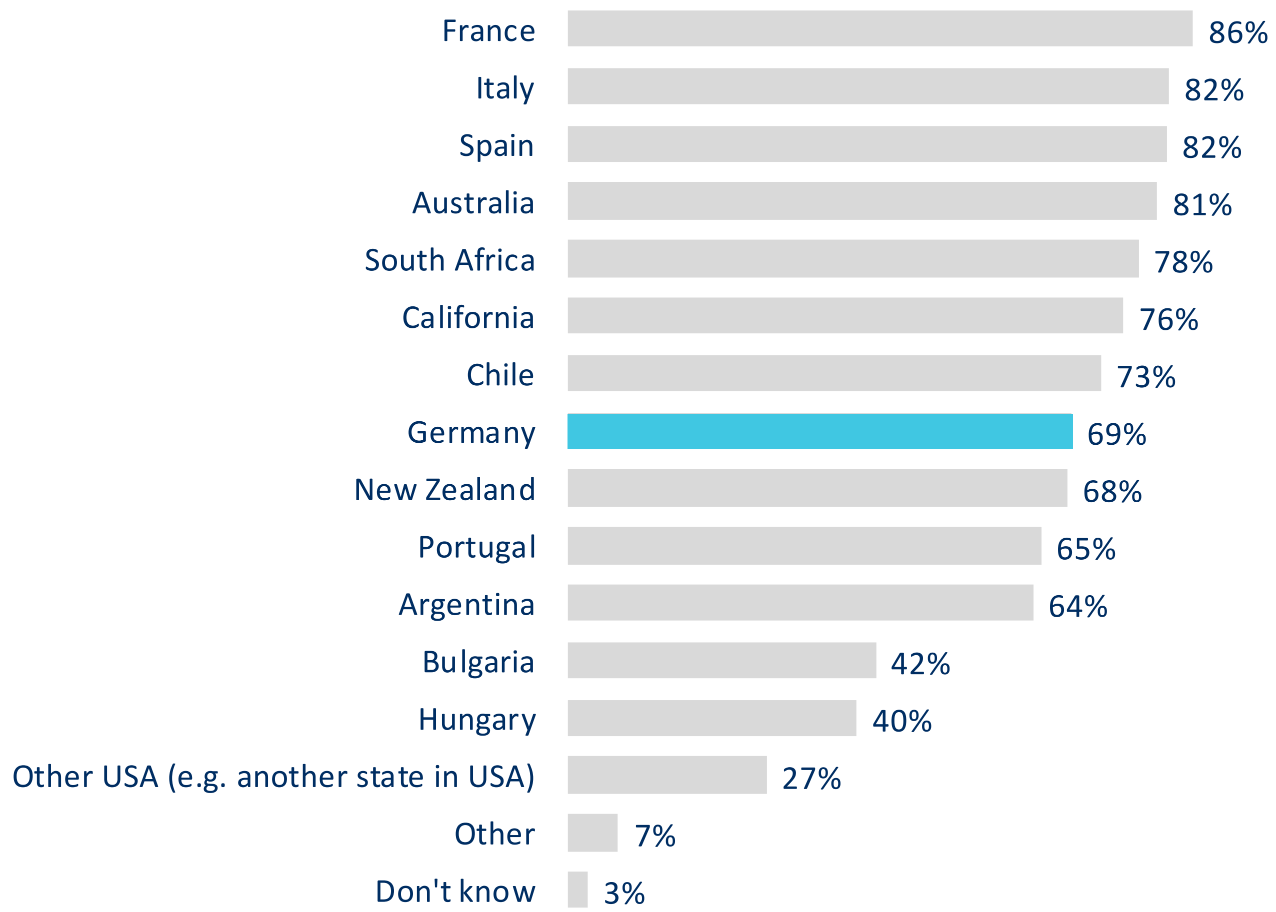
Country of origin conversion

More than 2 out of 3 who have heard about Germany as a wine producing country have drunk German wine in the past 6 months

Country of origin conversion

% who have drunk wine from the following country in the past 6 months

Base = Those who have heard of the following countries



Source: Wine Intelligence, Vinitrac® UK, June '15, n=1,000 UK regular wine drinkers

Channel usage

While supermarket usage remained stable a lot of other channel usage increased significantly in the long-term. Discount stores are now used by 35% of RWD

Channel usage when buying wine: Tracking

% who have bought wine from following channels in the past 6 months
Base = All UK regular wine drinkers

Rank in 2015	Channel n=	2013 1,019	2014 1,001	2015 1,000	Long-term trend '13-'15	Short-term trend '14-'15
1	In a supermarket	89%	88%	88%	➡	➡
2	In a discount store (e.g. Aldi, Lidl,…)	24%	32%	35%	⬆	➡
3	In a corner/convenience shop	23%	26%	27%	⬆	➡
4	In a wine shop/off licence chain (e.g. Majestic)	19%	23%	24%	⬆	➡
5	From a supermarket website	16%	19%	20%	⬆	➡
6	In an independent wine specialist store	11%	13%	16%	⬆	➡
7	From Duty Free (e.g. airports)	10%	12%	13%	➡	➡
8	From another online wine store	7%	10%	9%	➡	➡
9	Through mail order	5%	7%	8%	⬆	➡
10	From the wine producer's cellar	4%	6%	6%	➡	➡
11	On cross-channel shopping trips	5%	6%	6%	➡	➡
	Other	2%	1%	3%	⬆	⬆
	I do not buy wine to drink at home	1%	1%	1%	➡	➡

⬆: statistically significantly higher than previous wave at a 95% confidence level
⬇: statistically significantly lower than previous wave at a 95% confidence level
Source: Wine Intelligence, Vinitrac® UK, Aug '13, n=1,019, Aug '14, n=1,001, June '15, n=1,000 UK regular wine drinkers

Retailer usage

While Tesco usage declined significantly in the long-term, Sainsbury's, among other retailers, increased significantly

Retailer usage: Tracking

% who have bought wine from the following retailers in the past 6 months
Base = All UK regular wine drinkers

Rank in 2015	Retailer n=	2013 1,019	2014 1,001	2015 1,000	Long-term trend '13-'15	Short-term trend '14-'15
1	Tesco	52%	48%	45%	⬇	➡
2	Sainsbury's	28%	34%	36%	⬆	➡
3	Asda	24%	24%	24%	➡	➡
4	Aldi	10%	16%	18%	⬆	➡
5	Morrisons	18%	15%	18%	➡	➡
6	Co-op	9%	10%	13%	⬆	⬆
7	Lidl	7%	11%	12%	⬆	➡
8	Marks & Spencer	8%	11%	11%	⬆	➡
9	Waitrose	8%	7%	10%	➡	⬆
10	Majestic	5%	5%	6%	➡	➡
11	Laithwaites	4%	4%	5%	➡	➡
12	Bargain Booze	3%	3%	4%	➡	➡
13	The Wine Society	1%	2%	2%	⬆	➡
14	Wine Rack	1%	2%	2%	➡	➡
15	Naked Wines	n/a	n/a	2%	n/a	n/a
16	Oddbins	2%	2%	2%	➡	➡
17	Sunday Times Wine Club	1%	1%	2%	➡	➡
18	Virgin Wines	2%	3%	2%	➡	➡
19	CostCo	1%	1%	1%	➡	➡
20	Ocado	1%	2%	1%	➡	➡
21	BB Warehouse	0%	1%	1%	⬆	➡
	Other	7%	6%	5%	⬇	➡
	None of these	1%	0%	1%	➡	➡

⬆: statistically significantly higher than previous wave at a 95% confidence level
⬇: statistically significantly lower than previous wave at a 95% confidence level
Source: Wine Intelligence, Vinitrac® UK, Aug '13, n=1,019, Aug '14, n=1,001, June '15, n=1,000 UK regular wine drinkers

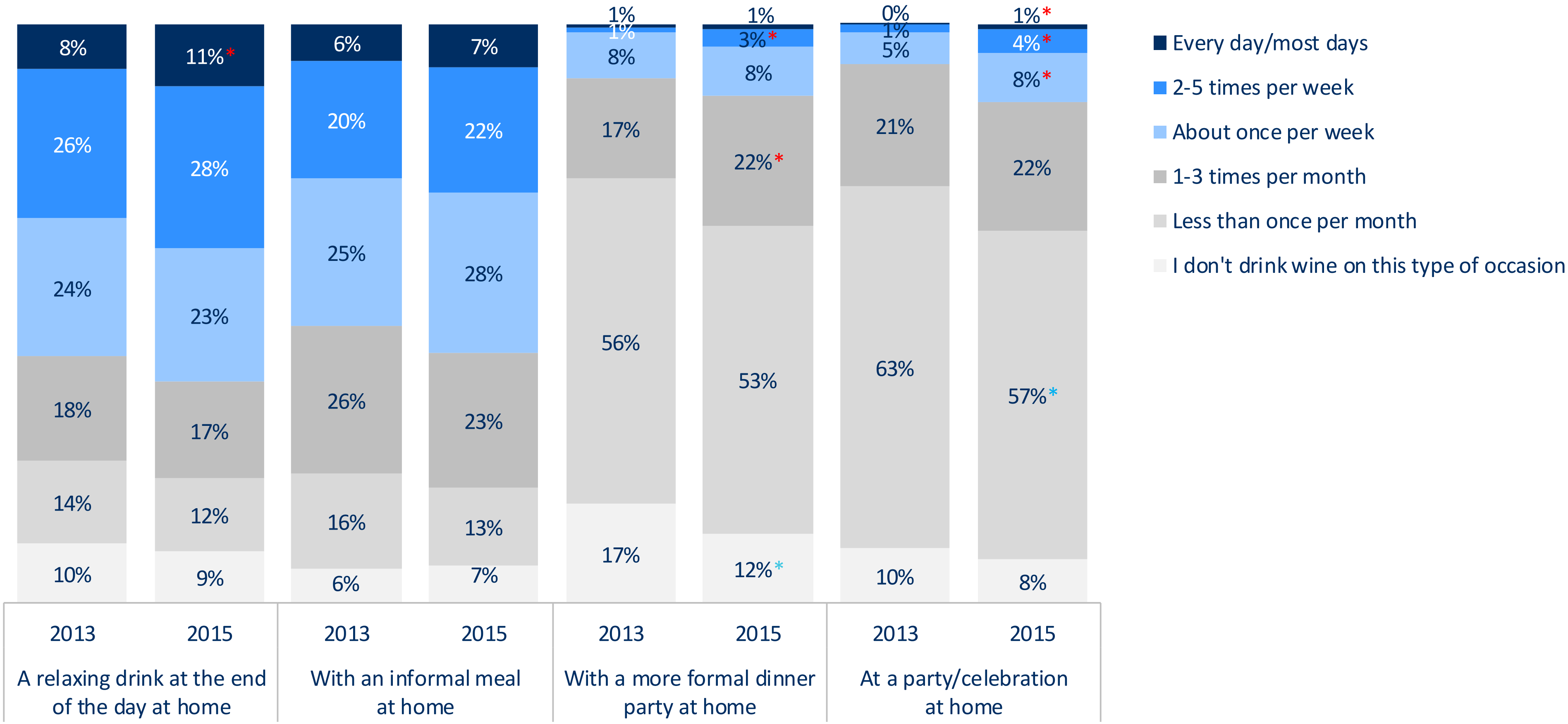
Off-trade consumption frequency by occasion

Wine is being drunk more frequently as a relaxing drink at the end of the day at home, with a more formal dinner party at home and with a party/celebration at home

Off-trade consumption frequency by occasion

% who drink wine in the following occasions

Base = All UK regular wine drinkers who drink in the off-trade



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Source: Wine Intelligence, Vinitrac® UK, Aug '13, n=1,019, June '15, n=1,000 UK regular wine drinkers

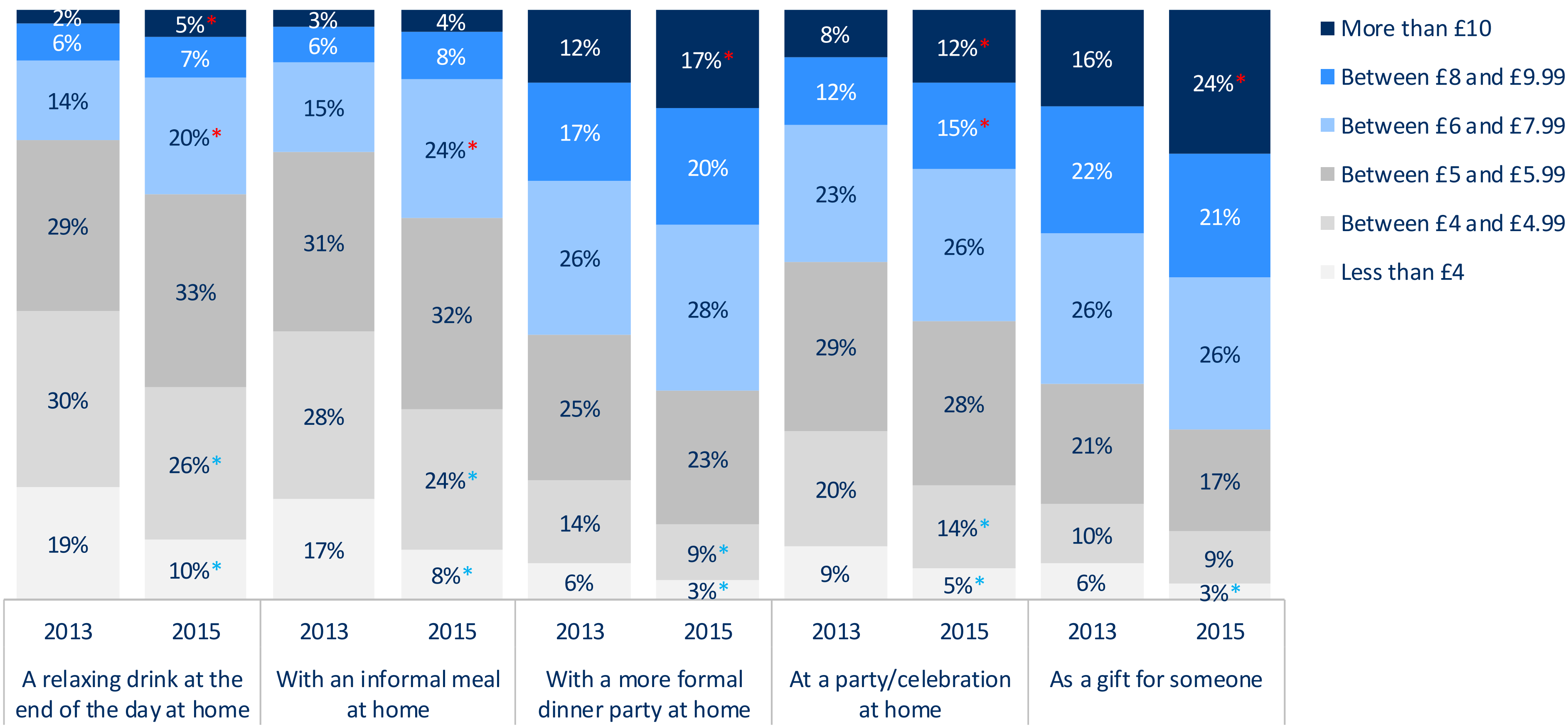
Off-trade spend by occasion

Significant changes in spend appear to be afoot: a quarter of regular drinkers say they spend over £10 on wine as a gift (2013: 16%) while 36% spend more than £6 on a bottle for an informal meal at home, up from 24% in 2013

Off-trade spend by occasion

% who are prepared to pay the following amount for the following occasions

Base = All UK regular wine drinkers who drink in the off-trade



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Source: Wine Intelligence, Vinitrac® UK, Aug '13, n=1,019, June '15, n=1,000 UK regular wine drinkers

Choice cues

The importance of recommendations, brands and the appeal of the bottle/label design increased significantly in the long-term

Choice cues: Tracking

% who quoted the following as ‘important’ or ‘very important’ when selecting wine
Base = All UK regular wine drinkers

Rank in 2015	Choice cues n=	2013 1,019	2014 1,001	2015 1,000	Long-term trend '13-'15	Short-term trend '14-'15
1	Grape variety	70%	70%	69%	→	→
2	Promotional offer	66%	67%	65%	→	→
3	A brand I am aware of	55%	61%	64%	↑	→
4	Country of origin	58%	60%	62%	→	→
5	Recommendation by friend or family	49%	54%	57%	↑	→
6	Region of origin	52%	55%	54%	→	→
7	Alcohol content	44%	47%	46%	→	→
8	Appeal of the bottle and/or label design	28%	32%	33%	↑	→
9	Recommendation by shop staff or shop leaflets	22%	31%	30%	↑	→
10	Recommendation by wine critic or writer	21%	24%	28%	↑	→
11	Medal or award	18%	25%	26%	↑	→
12	Recommendation by wine guide books	17%	23%	24%	↑	→

↑: statistically significantly higher than previous wave at a 95% confidence level
↓: statistically significantly lower than previous wave at a 95% confidence level
Source: Wine Intelligence, Vinitrac® UK, Aug ‘13, n=1,019, Aug ‘14, n=1,001, June '15, n=1,000 UK regular wine drinkers

Vinitrac Data and Methodology

Overview of standard vinitrac data available in full report

	Question title	Question label
1	Country	Which country do you live in?
2	Region	In which region do you live?
3	Age	Which of the following age groups do you fall into?
4	Gender	Are you…?
5	Beverages	Which types of beverages do you drink?
6	Consumption frequency	Which one of these categories best describes how often you usually drink wine? (including drinking at home and when you're out at restaurants for example)
7	Wine-buying channels	From which store(s) have you bought wine in the past 6 months?
8	Stores	Please tell us the name of the store(s) you mainly use to buy wine
9	Off-trade occasions frequency	The next two questions are about your WINE drinking habits when you are at home. Firstly, how frequently do you DRINK wine for each of the following types of occasions:
10	Off-trade occasions spend	Secondly, and again for each of the same set of occasions, how much do you typically spend on a BOTTLE of wine?
11	Bars or pubs	Do you ever buy wine in a bar or pub?
12	Restaurant	Do you ever buy wine in a restaurant?
13	On-trade occasions frequency	The next two questions are about your wine drinking habits in bars, pubs and restaurants. Firstly, how frequently do you drink wine for each of the following types of occasion:
14	On-trade occasions spend	Secondly, and again for each of the occasions, how much do you typically spend on a bottle of wine?
15	Choice cues	Looking at the list below, please indicate how important each is to you when buying wine. Please use the 1-5 scale where 1="Not at all important" and 5="Very important".
16	Involvement, value and perceived expertise 1	Looking at the statements below, please indicate the extent to which you agree with each on a 1 to 5 scale where 1="Disagree strongly" and 5="Agree strongly"
17	Proportions of red, white and rosé	What proportion of red, white and rosé wine do you drink?
18	White varietal usage	Which white wine grape varieties have you drunk in the past 6 months?
19	Red varietal usage	Which red wine grape varieties have you drunk in the past 6 months?
20	Country of origin awareness	Looking at the wine-producing countries below, please indicate which ones you have heard of?
21	Country of origin usage	From which of the following wine-producing places have you drunk wine in the past six months?
22	Region of origin awareness	Looking at the wine-growing regions below, please indicate which ones you have heard of:
23	Region of origin usage	Looking at the wine-growing regions below, please indicate which ones you have bought wine from in the past 3 months:
24	Prompted brand awareness	Looking at the brands below, please indicate which of the brands you have heard of.
25	Brand purchase	Which of these brands have you bought in the past 3 months?
26	Brand affinity	Which of these brands do you think are right for people like you?
27	Brand recommendation	Which of these brands would you recommend to a friend?
28	Wine Attitude	Thinking about your attitude to wine, please look at the statements below and choose the one that is most appropriate to you.
29	Involvement, value and perceived expertise 2	Looking at the statements below, please indicate the extent to which you agree with each on a 1 to 5 scale where 1="Disagree strongly" and 5="Agree strongly"
30	Closures	What is your view about buying wine with the following types of closure?
31	Income	Which of the following best describes your total household income before taxes last year.

Source: Wine Intelligence, Vinitrac® Japan, Mar'16, n=1,148 Japanese regular wine drinkers

Vinitrac Data and Methodology

Overview of methodology

- The data for this survey was collected in Japan in March 2014, March 2015 and March 2016
- Data was gathered via Wine Intelligence's Vinitrac® online survey:
- 1,011 Japanese regular wine drinkers (March 2014)
- 1,012 Japanese regular wine drinkers (March 2015)
- 1,148 Japanese regular wine drinkers (March 2016)
- 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 Japanese regular wine drinkers in terms of age, gender and region
- The distribution of the sample is:

Japan		Mar'2014	Mar'2015	Mar'2016
		n=1,011	n=1,012	n=1,148
Gender	Male	50%	46%	46%
	Female	50%	54%	54%
	Total	100%	100%	100%
Age	20-24	4%	13%	13%
	25-34	14%	15%	15%
	35-44	15%	20%	20%
	45-54	19%	21%	21%
	55-64	41%	21%	21%
	65 and over	7%	10%	10%
	Total	100%	100%	100%
Region	Hokkaido	6%	7%	5%
	Tohoku	4%	4%	6%
	Kanto	38%	44%	46%
	Chubu	15%	13%	12%
	Kansai	22%	18%	17%
	Chugoku	3%	5%	4%
	Shikoku	3%	2%	2%
	Kyushu	8%	6%	8%
	Total	100%	100%	100%

Source: Wine Intelligence, Vinitrac® Japan, Mar'14 (n=1,011), Mar'15 (n=1,012), Mar'16 (n=1,148) Japanese regular wine drinkers

Vinitrac Data and Methodology

Overview of methodology

How does Vinitrac® work?

1) Defining the right samples:

- Wine Intelligence, with the support of global research companies (e.g. TNS, YouGov), regularly runs calibration studies in each market in order to define demographic specifications of the wine consumers and the size of the market (i.e. penetration of wine consumption)

2) Running the online survey:

- Invitations to participate in an online survey programmed by Wine Intelligence are then distributed to residents in each market
- Respondents are directed to a URL address, which provides access to the online survey
- Based on given criteria (e.g. age, beverage, frequency of wine consumption) respondents will either proceed or screen out of the survey
- Wine Intelligence monitors completed responses to build samples representative of the target markets' wine drinking population based on the most recent calibration study

3) Cleaning the data:

- When a representative sample is logged, the survey is closed
- Wine Intelligence will then clean out all invalid data points (e.g. those who sped through the survey or gave inconsistent answers to selected questions) and weight the data in order to ensure representability

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