



The widening **appeal** of **Irish Whiskey** in Britain's On Premise

Paul Bolton
Client Director – GB Drinks
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As a category often forgotten about to alternative whiskey types in the past, the Irish Whiskey category is now experiencing momentous growth, with post-pandemic data showing promising signs of rebirth within Great Britain's bars, pubs, and restaurants.

Using CGA by NielsenIQ's On Premise Measurement tools, **Client Director GB Drinks, Paul Bolton**, explores the potential of the category and outlines how operators and suppliers can make the most of Irish Whiskey's current popularity by broadening its appeal beyond its traditional audience.

While Irish whiskey has previously been overshadowed by alternative whiskey types, **the category seems to be roaring back** and developing into one that Britain's On Premise suppliers and operators should keep a close eye on.

 **£102m**

Irish Whiskey's market value over the last 12 months in Great Britain

CGA's On Premise Measurement tool (OPMS), which provides suppliers and operators with deep insights into category trends and opportunities across Great Britain's bars, pubs, and restaurants, reveals that **Irish whiskey's market value over the past 12 months was worth some £102 million**. Admittedly, such a figure still sits significantly below competing categories: Malt Whisky is

valued at £134 million, Blended Scotch at £304 million, and American Whiskey at nearly four times its Irish counterpart (£393 millions).

Additionally, Irish Whisky makes up but a small fraction of On Premise sales, accounting for a mere 0.2% of all spirits sold. The category, however, is clearly **widening its appeal and now makes up over 10% of total whisk(e)y value**. When compared to pre-COVID-19 figures, Irish whiskey has grown by 13% ahead of its aforementioned rival categories – American Whiskey, Malt Whisky, and Blended Scotch – which have instead been experiencing inverse fortunes.

Irish Whiskey's widespread distribution further proves its growing popularity. The **category is now stocked by nearly 80,000 outlets**, a figure that represents 80% of total On Premise venues in Britain. While still not as popular as American Whiskey and Blended Scotch, these numbers put Irish Whisky's distribution ahead of Malt Whisky.

Of all stocking outlets, the majority tend to be pubs, followed by hotels. They are largely located in London, where Britain's largest Irish diaspora community has been contributing to its popularity. Irish Whiskey is however common across a diverse range of On Premise venues in central counties and in the South West of England, too.



Capturing a new audience

With Irish Whiskey still representing but a tiny fraction of total sales within the On Premise, the category offers suppliers and operators plenty of opportunities to tap into.

The upcoming Irish national festivity on 17th March – St Patrick day – has traditionally represented one of the most profitable occasions to capitalise on Irish Whiskey. Tying the category up with alcoholic beverages generally associated with Irish culture – such as Stout beer and Cream Liqueurs – is a **tested strategy to exploit the full potential of St Patrick's Day**.



Market leading brands dominate Irish Whiskey, but an expanding array of novel expressions (such as added flavourings) can benefit suppliers and venues throughout the year by **appealing to a younger audience** and to drinkers who might have never engaged with the category before.

Meanwhile, more engaged spirits consumers who tend to favour premium, craft options can be targeted by presenting them with the choice of newer brands. Some of these have found in celebrity endorsement the





ideal strategy to grow popularity among a new audience, a strategy that the On Premise sector can use to its advantage.

Furthermore, with CGA data showing that mixed drinks are thriving particularly among the younger segments of the British market, **cocktails can represent a potentially lucrative partner for Irish Whisky**. This may be integrated into expertly crafted cocktails as well as paired with a range of mixers – including the trending ginger ale and beer category – in simpler long drinks.

CGA research tools show how these strategies allow suppliers and operators to make the most of Irish Whiskey's potential across Britain's On Premise by capturing a younger, less traditional consumer base.

Indeed, while rival categories such as American and even Malt Whisky benefit from a younger audience – likely as a result of the greater variety they offer – Irish Whiskey consumers are generally older than the average whiskey drinker. **Failing to broaden its reach is the category's greatest threat**, while those who will manage to lure in a new, younger audience will succeed in capitalising on the Irish Whisky opportunity.



Other whisk(e)y categories such as American and Malt Whisky **attract a younger audience** – failing to broaden its reach presents the greatest threat to the Irish Whiskey category.



Paul Bolton
CLIENT DIRECTOR
GB DRINKS

CGA by NielsenIQ's **On Premise Measurement solution (OPMS)** provides suppliers and operators with deep insights into trends and **opportunities across the whisky category** in the On Premise sector across Great Britain.

CGA's expert team can also provide **bespoke analysis to pinpoint opportunities** for individual brands and sub-categories. To learn more about CGA's capabilities across the On Premise industry, visit www.cgastrategy.com and email CGA **Paul Bolton, Client Director**, GB Drinks at Paul.Bolton@cgastrategy.com.