

What is the British wine consumer really buying? Ocado's perspective

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Will Hill, Senior Wine Buyer at Ocado, explains how the British wine consumer is changing: more focused on price and promotions, still loyal to major brands, but increasingly open to low-alcohol wines, chilled reds, alternative formats and emerging regions. In the UK market, value is becoming as important as trend-led discovery.

The **British wine market** is changing, although not always in the direction most often discussed within the trade. Consumers are looking for value, making greater use of promotions, remaining loyal to recognisable brands, yet also showing growing openness towards lighter, lower-alcohol and easier-drinking wines. When the price is right, they are also

increasingly willing to explore less obvious wine regions.

We spoke to **Will Hill, Senior Wine Buyer at Ocado**, one of the UK's leading online supermarkets. Before joining Ocado, Hill spent more than ten years working as a wine buyer in the London market, dealing directly with wineries, importers, restaurant groups, on-trade chains and wine bars. In recent years, he has focused particularly on wines from lesser-known regions, with specific attention to Eastern Europe and alternatives to the classic wine-producing areas.

His perspective is especially interesting because it combines two different levels of market insight: the broader reading of the UK retail market and the ability, typical of a digital operator, to detect signals through **searches, clicks and online purchasing behaviour**.

How would you describe the UK wine consumer today? Are they more price-driven, more curious or more selective than they were one or two years ago?

I would say all three are true, but **price is a major factor at the moment**. The cost of living is affecting people's spending habits, and wine is ultimately a non-essential product. In retail, we are seeing many more consumers taking advantage of offers, promotions, "buy one get one free" mechanics and 25% discounts.

At the moment, around **75% of the wines we sell go through some form of promotion**. That gives a clear indication of how much consumers are looking for value. It does not necessarily mean they are simply buying the cheapest bottle, but they do need to feel that the price is justified.

Another very important factor in the UK is **taxation**. Wine duty has changed several times over the past two years, and we now

have a structure where every 0.5% of alcohol can affect the final price of a bottle. This is indirectly pushing interest towards lower-ABV wines: they carry less duty and can therefore be more competitive for the consumer.

We see this especially in red wines. There is a gradual move away from fuller-bodied, more structured and higher-alcohol styles. Suppliers are also adapting their portfolios: more and more importers, including larger ones, are promoting wines at 10.5% or 11% alcohol. A few years ago, the ABV was simply the ABV. Today, it has become a **strategic factor**.

So the discussion around fresher, lighter and lower-alcohol wines is not just a trade narrative?

No, in our market it is a real movement. It is no longer just a topic of conversation. The popularity of these wines is growing, and it is not limited to small niches. Highly visible products, such as Kylie Minogue's 8% alcohol rosé, show that **low alcohol** is no longer just a unique selling point: it is becoming almost a necessity.

The same is happening with **chilled red wines**. Last year, we were already seeing some interesting signs, but this year the trend has really taken off. In the UK, there is a lot of discussion around it: journalists, influencers and specialist publications are all talking about chilled reds. We expect a significant peak this summer.

Online search data confirms this. Searches for "**light red wines**" are up 85% year on year, while "**chilled red**" has increased by 800%. Even sparkling red wines are attracting renewed interest: Lambrusco, for instance, has shown a notable resurgence in recent months, with searches up by around 30%.

Beyond emerging trends, which wine styles are currently selling the most?

If we are talking about volume, the top three are very clear: **Prosecco, New Zealand Sauvignon Blanc and Southern French rosé**. New Zealand Sauvignon Blanc, in particular, is performing incredibly strongly. When you look at the numbers, the amount of product moving through the market is remarkable.

These styles continue to meet very clear consumer needs: **recognisability, freshness, immediacy and ease of understanding**. Consumers know what to expect, and in a period when price matters so much, that becomes even more important.

How is Italian wine performing on Ocado, beyond Prosecco?

Italian wine is not in decline, but **it is not growing as quickly as some other major categories**. We look at the key producing countries: France, Spain, Italy, the United States, Australia and Chile. Within that landscape, Italy remains important, but at the moment it is not among the most dynamic categories.

I do not think the issue is mainly linked to taxation. Of course, duty can have an impact on slower-moving wines or on higher-alcohol and more expensive products such as Amarone and Barolo, but in those segments price is often less of a decisive concern for the consumer. Even accessible, higher-alcohol Italian wines, such as some Primitivo from Puglia, continue to sell well and often still come in at around 13% or 13.5% alcohol.

It is also worth saying that **Ocado is something of an exception compared with the wider market**. In general, many categories in UK supermarkets are either flat or growing very slowly. We, however, are seeing significant growth: our BWS

category, meaning beer, wine and spirits, is growing at around 9.5-10%, well above the broader market rate. So when I talk about growth or slower performance, I am mainly referring to Ocado's figures, not necessarily the entire UK retail market.

Does the fact that Ocado is an online supermarket change the way consumers buy wine?

Yes, it does. Online, we have some obvious limitations: consumers cannot physically pick up the bottle, they cannot see an in-store display in the aisle, and they cannot be engaged in quite the same way as they would be in a traditional supermarket.

That means we have to work differently: **graphic banners, product positioning on search pages, search-term management, recommendations and cross-category promotions**. If a customer is looking for steak, frozen pizza or a ready meal, we can recommend a wine to pair with it and potentially build bundle or meal-deal mechanics around that.

Internal search behaviour is crucial. Terms such as "light red wines", "orange wine", but also very broad searches like "red wine" or "white wine", help us understand where to position products and how to build visibility.

That said, we should not fool ourselves: **consumers remain very brand loyal**. Many of the wines we sell in large volumes are major global brands. There is certainly room to offer something different, and we do try to do that, but brand strength still matters a great deal. Ocado is very effective at building and selling brands that consumers already recognise.

How much do data influence your wine selection?

A lot. We are a highly data-driven business. **Every click, every search term and every traffic flow on the website** gives us useful information to curate the portfolio and decide product placement.

Data allow us to identify trends earlier. We can see which terms people are searching for, what click-through rate they generate and, above all, what conversion rate they produce. Sometimes consumers search for something but do not then buy it. That may tell us that something is missing from the portfolio, or that the product exists but has not been positioned correctly.

Of course, as a large-scale operation, adding new products and new suppliers takes more time than it would for a smaller independent business. Data give us an advantage in reading signals, but it still takes time to translate those signals into the assortment.

How important is the no and low-alcohol category today? And who is buying it?

It is huge. It is very important for us, and it is important for the whole market. It has been growing for some time, but it now feels as though it is entering a more mature phase. We consider **low alcohol to be anything below 8.5%**.

The major difference compared with the past is that quality is improving. At the beginning, the technology arrived very quickly and not everyone had the expertise to produce dealcoholised or low-alcohol wines at a convincing quality level. When you remove alcohol, you also remove other components, and the product can suffer.

Today, we are seeing more producers finding that balance. In

the UK, the quality threshold is quite high, and in the past many operators were reluctant to list products that did not reach that level. Now the situation is different: **the product is there, the branding is there, the trend is there and consumer demand is there too.**

In terms of the consumer profile, on Ocado we do not yet see a radical difference compared with the general wine consumer. Our typical wine customer is relatively mature and has a strong female component. In no and low alcohol, we are not yet seeing a clear shift towards much younger consumers. That may change over the next 12 or 18 months, but for now the audience remains fairly broad.

Your range also includes canned wines and alternative formats. Are they genuinely growing?

Yes, **alternative formats** are growing in the UK. Cans work because they are convenient: you see them at Wimbledon, at cricket events and in outdoor consumption occasions. They are easy to chill, easy to transport and easy to portion. By reducing waste and breakage, they also offer clear practical advantages.

Quality can be good, provided the product is suitable for the format. There are technical aspects to consider: gases, internal linings and the compatibility of certain grape varieties with the packaging. But if all those elements are handled correctly, there is no reason not to put fresh, young, ready-to-drink wines into cans.

Bag-in-box is also growing. For home consumption, it makes sense: it reduces waste, offers an interesting value-for-money proposition, has logistical advantages and is no longer automatically associated with cheap, poor-quality wine. More producers are paying real attention to what goes into these

formats, and that is changing perception.

Looking ahead, which categories do you expect to grow? And what mistake do you still see in the wine industry?

The two major trends I expect to keep growing are **chilled red wines** and, more broadly, **lower-alcohol wines** across all categories. These are trends we have already seen emerging, but I believe they still have a lot of room to develop.

As for mistakes, I think many people in the wine industry still focus too heavily on the classic regions, without looking enough at the wider wine world. Champagne, Bordeaux and Burgundy are important, but they are also expensive. Today, consumers are looking for value, and that value can come from **emerging regions, less familiar areas and countries that until recently were not seen as central to the conversation.**

The point is not to abandon the classics, but to understand where good value and strong representation can be found. In this sense, Eastern Europe, as well as other less traditional areas, is offering interesting opportunities.

There is also a broader issue: **demystifying wine.** For years, the industry has spoken in a language that is too technical and too closed. People often say that younger consumers are no longer drinking wine, but perhaps they are simply drinking it differently. Every generation consumes and communicates in its own way. The role of the industry is to understand that, not judge it.

We need to be quicker, more aware of new forms of communication and less dismissive of social media and influencers. Older generations can be quick to reject them, but for many young people they are the main way of consuming content. If used well, they can help make wine more

accessible, less intimidating and closer to real consumption occasions.

Key points

1. **Price:** UK consumers are looking for value, promotions and justified spending.
2. **Low alcohol:** lighter and lower-ABV wines are becoming a real market movement.
3. **Brands:** recognisable labels still drive large volumes online.
4. **Data:** searches, clicks and conversions increasingly shape wine selection.
5. **Formats:** cans and bag-in-box are gaining credibility and practical relevance.