

Report Brochure



WINE PACKAGING

CONSUMER INSIGHTS FROM THE UK MARKET

JULY 2012



REPORT PRICE: GBP 500 or 1 Report Credit

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Introduction



Bottles are as much a part of the culture and iconography of wine as grapes on a vine. For generations of wine drinkers, a 75cl glass vessel has delivered everything from premier cru Bordeaux to the humblest country wines.

The places that sell wine are known in many parts of the UK (and elsewhere in the world) as “bottle shops”. We talk about bottle ageing, bottle shock, bring-a-bottle parties. Even in the age of the screw-cap, we all possess at least one corkscrew. Most of us can do a quick mental calculation of how many bottles we will require for any size of social gathering.

But is this sort of packaging as relevant today as it was a century ago, when few other options were available? We now have the ability to package wine in all kinds of synthetic containers. We can employ PET instead of glass, with all the environmental benefits that entails. We can use cardboard vessels, such as Tetra Pak, which for many consumers are a logical, simple way of transporting and storing wine.

Consumers, and the trade, are also becoming more open-minded about size. Is 75cl really a sensible quantity to buy if you’re an elderly person, living alone – or indeed if you’re planning a party, or just want a single glass of wine every night over the course of a week? For such consumers, fractional bottle sizes, or bag-in-box packaging, begin to look like more efficient options.



But this isn't simply a question of efficiency, and logical thought. Wine is an emotive purchase and not all of the decisions we make are based on cold rationality. As this report demonstrates, the choice of what kind of packaging to buy isn't just a question of how convenient it is to carry, or how good it is at keeping wine fresh once it's opened.

There are other considerations, which are much less easy to quantify. Is this packaging right for people like me? Is it sophisticated? Am I going to be proud to serve it to my guests? These factors need to be weighed alongside more basic considerations, such as value for money and portability. Environmental issues are also on consumers' radar.



With 75cl bottles so entrenched in the supply chain, and in the mindsets of UK wine consumers, is it realistic to expect alternative packaging to make inroads? Yes – and it's already happening. More than half of all regular wine drinkers – just under 15 million people – have bought bag-in-box at some point, so even if they don't return to it on a regular basis, they are familiar with it. Almost 4 million have bought wine in Tetra Pak.

PET wine bottles might seem futuristic, but four out of 10 regular wine drinkers have already brought them home. Even more consumers have purchased small format bottles.

Introduction (cont.)

True, only a small proportion of these consumers return to alternative packaging on a regular basis. But the data at least demonstrates an open mindedness that shouldn't really surprise us – remember the predictions that consumers would reject screw-cap closures?

The wine industry would have us believe that alternative packaging options have no detrimental effect on the wine they contain – indeed, they may even do a better job, in some circumstances, than glass. Producers can quote any amount of scientific or organoleptic data to back up their arguments.

But this is not a debate that will be played out in any laboratory. It's one that's happening around the UK, in the grocery aisles and across dining tables. Wine marketers need to understand what consumers think about these new packaging solutions, whether they agree with the feedback they receive or not. The UK bottle culture is not going to be smashed overnight, but a two-way dialogue between producer and end user could yet lead to a small but significant shift in the way wine is packaged.

Graham Holter
Associate Director - Publishing
Wine Intelligence
July 2012



QUANTITATIVE METHODOLOGY: Wine Intelligence Vinitrac[®]



- The data for this study was collected in January 2012
- The data was gathered via Wine Intelligence's Vinitrac[®] online survey, with a sample size of 603 UK wine drinkers, meeting the following requirements:
 - Adult drinking age
 - Permanent resident of the country
 - Drinks wine at least once a month
- The survey data was post-weighted to be representative of UK regular wine drinkers in terms of age, gender and socio-economic groups
- Invalid respondents (those who sped through the survey or gave inconsistent answers to selected questions) were removed before analysis
- The distribution of the sample can be seen in the table to the right

SAMPLE OF THE SURVEY

UK Regular adult wine drinkers (where 'regular' = drinks wine at least once per month)

Each Vinitrac[®] survey starts with questions to screen respondents:

- Adult drinking age within each country
- Permanent resident of the country being surveyed
- Drinks wine at least once per month
- Drinks at least red, white or rosé wine
- Buys wine in the off-premise and/or in the on-premise channels

... and rejects all respondents who do not fulfil these Vinitrac[®] criteria



Each sample is representative of the 'regular' wine drinking population in that market and is therefore valid; a sample size of at least 500 consumers ensures results are reliable. It's like a 'smaller' version of the wine drinking population at large

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