WINE PACKAGING FORMATS AND CLOSURES IN THE UK MARKET

April 2018 Report

Wine Packaging Formats and Closures in the UK Market 2018

Report overview

Report price:

GBP 1000
USD 1400
AUD 1800
EUR 1200

2 report credits

The Wine Packaging Formats and Closures in the UK Market 2018 report includes:

- Report with the latest information regarding packaging formats and closures in the UK wine market, supported by:
  - Wine Intelligence Vinitrac®
  - Wine Intelligence market experience
  - Secondary sources
  - Trade and consumer interviews

*All prices exclusive of VAT, GST, or relevant local sale taxes at the current rate

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Introduction

The number of drinkers who purchase wine in formats beyond 75cl bottles remains small within the UK market, reflecting a category which continues to be both 'conservative' and traditional from both a trade and a consumer perspective. Within this context, not all UK regular wine drinkers are familiar with the standard size (75cl) bottle format for wine, nor aware of what volume these bottles contain. This is more prevalent amongst younger wine drinkers.

Younger wine drinkers in the UK are also less aware of different packaging formats for wine, reflecting their shorter experience and familiarity with the wine category. However, they are more likely to consider buying from a broader range of packaging formats in the future, signalling future opportunity for alternative packaging formats for wine. The less traditional formats of can and pouch have the highest conversion rates amongst these younger wine drinkers and in addition, single serve bottles and pouches also have significantly higher affinity ratings amongst drinkers aged 18-24

1.5L bottles show strong future potential in the UK market, with strong affinity and future consideration ratings amongst wine drinkers. Those who have a high involvement with the wine category are more likely to both purchase and feel an affinity towards 1.5L magnums when compared with other UK wine drinkers reflecting the opportunity for magnums as more mainstream and premium products, rather than value products.

Introduction

The evidence from consumers suggests that wine in cans may have future potential, although currently, cans have the lowest affinity rating amongst all packaging formats. When it comes to single serves, these have the highest rates of conversion to purchase amongst UK wine drinkers, and they also show stronger potential with younger drinkers, although significantly more so amongst women rather than men.

Both screw-caps and natural cork are now equally accepted and liked in the UK by consumers. Compared to 2013, a higher proportion of UK wine drinkers are now open to buying wine with a screw-cap, although affinity for these closure types has remained stable since 2015. Younger drinkers are also significantly more likely to favour screw-caps over natural cork.

Indications suggest that there may be packaging innovation opportunities in the UK, especially as we continue to feel the impact of some of the more significant changing consumer dynamics, such as the moderation and reduce trends. As with all change in a more traditional category such as wine, our consumers are most likely to show some initial resistance to change. But if the screw-cap experience has taught us anything, it is that perceptions can be changed and consumer behaviour shifts are possible and indeed, likely.

Lulie Halstead
CEO

Vinitrac® methodology

- Data collection:
  - The data for this report was collected in October 2013, October 2015 and October 2017
  - Data was gathered via Wine Intelligence's Vinitrac® UK online survey and is representative of all UK regular wine drinkers
- Screening criteria:
  - Respondents were required to drink wine at least once per month, to drink at least red, white or rosé wine and to buy wine in the off-trade and/or in the on-trade
- Data processing:
  - Invalid responses (those who completed the survey too quickly, or who "straight-lined" through selected questions) were removed from the sample
  - The survey was post-weighted in terms of age, gender. Sample was not post-weighted by income until 2017
- Sample distribution:
  - The distribution of the sample is shown in the table:

UK				
		Oct-13	Oct-15	Oct-17
	Sample size n=	*1035*	*1017*	*1000*
Gender	Male	48%	45%	50%
	Female	52%	55%	50%
	Total	*100%*	*100%*	*100%*
Age	18-24	10%	10%	7%
	25-34	15%	16%	18%
	35-44	17%	18%	18%
	45-54	18%	17%	19%
	55-64	17%	16%	16%
	65 and over	22%	23%	22%
	Total	*100%*	*100%*	*100%*

Source: Wine Intelligence, Vinitrac® UK, Oct' 13 (n=1,035), Oct' 15 (n=1,017), Oct' 17 (n=1,000) UK regular wine drinkers

Research methodology:

Vinitrac®

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

Research methodology

Qualitative trade research

Trade interview methodology

- Trade Interviews were conducted with seven experienced industry professionals in the UK wine trade between November 2017 and April 2018

- The seven interviewees were members of the wine trade working in different roles:
  - 1 x UK national grocery
  - 1 x Wine producer and brand owner
  - 1 x Brand owner / distributor
  - 1 x UK retailer
  - 1 x Wine category and design expert
  - 1 x UK wine trade expert on packaging

Consumer interview methodology

Age group	
18 - 24	2
25 – 34	3
55-64	1
Total	**6**

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