

Report Brochure



ONLINE RETAIL & COMMUNICATION IN THE UK MARKET

FEBRUARY 2016

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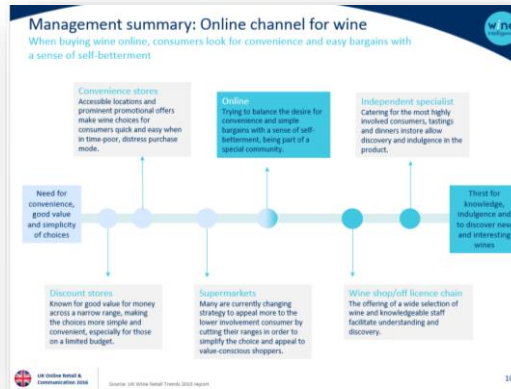
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Excerpts from the introduction

There is little doubt about it: the UK is a robust and healthy online market for wine, and it seems things can only get better. Internet penetration is higher in the UK than in other countries with significant internet populations, and such deep, expansive, and growing internet penetration is a necessary precursor to a lucrative and flourishing online retail environment. This is the direction in which the UK wine market is headed, our estimate suggesting that online purchases of wine represent no less than 10-11% of total wine sales (translating to £735 million for the year), a figure that is predicted to grow to 14% in the next three years. Compare this to the mere 4% of total wine sales that online purchases represent in the US.¹

In some respects, however, online media have a lot of catching up to do if they are to usurp offline media as the dominant force in the world of wine. The top 6 sources of wine information for UK wine drinkers remain offline, by far the most important of which being age old: friends, family or colleagues. And of consumers' top 15 sources of wine information, only 3 are internet-based.

Yet in other ways the internet and social media are slowly altering the rules of the game in the UK wine market. Since 2010 our tracking data has neatly highlighted the increase in those who pay attention to wine-related information online (+28.4%) and the staggering rise in those who actively engage in discussion about wine online (+90.3%). Furthermore, although still lagging markedly behind offline sources of information in terms of their relevance to consumers, online sources are exhibiting a significant increase in importance compared with 2010, with supermarket, newspaper or magazine websites leading the way.

Perhaps the most striking aspect of the development of online wine retail lies, oxymoronically, in its subtlety. Yes, internet users are becoming influenced about wine online, but the ways in which this is happening closely resemble patterns seen in the pre-net era. Online, too, the opinions of friends and family are what count the most, only on social media rather than in person. Similarly crucial are the opinions of wine merchants and small wine producers online. It would seem, therefore, that the internet primarily empowers pre-existing trusted sources of information with a new voice rather than enabling entirely new ones.

Nothing exemplifies these two faces of online retail and communication better than the plethora of apps currently available for download. Whereas they differ in a number of respects, in one they are almost universally akin: they are brimming with wine information, and you need hardly lift a finger to access it.



David Thompson
Project Executive

1. <http://www.thedrinksbusiness.com/2015/06/online-wine-sales-to-grow-globally/>

Research methodology:

Sampling and quotas used for Vinitrac® UK



- Data collection:
 - The data for this report were collected in November 2010 and October 2015
 - Data was gathered via Wine Intelligence's Vinitrac® UK online survey and is representative of all UK regular wine drinkers
 - Sampling: quotas / stratified
- 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 and gender

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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