WINE INTELLIGENCE

US: WINE PACKAGING FORMATS

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REPORT BROCHURE

PRICING

Report + data table

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INTRODUCTION

While many sectors of the US economy have seen radical change during the Covid crisis, the wine category has more or less managed to weather the storm in overall volume terms. However beneath the surface, big changes appear to be coming, and the way wine is packaged in future will be one such area.

Our 2020 study of US packaging formats suggests a market that is in the midst of awaking to a new way of doing business, driven by the younger generation. While standard size glass bottles are still the dominant container in the wine category, the growth of smaller formats, and particularly cans, are catching the eye.

So far, these new trends remain small in absolute terms. While awareness levels of canned wine have grown dramatically in the past 3 years, even today fewer than 4 in 10 wine consumers are even aware that wine can come in a can, and only 8% say they have bought canned wine in the past six months. More compelling data is the rate of change of purchase of cans – this has doubled since 2017 – and the growing proportion of consumers who would consider buying canned wine if it was available and the product itself was right for them.

Perhaps the most arresting insight from this report is the extent to which smaller formats generally, and cans in particular, are welcomed by those aged 21-39 – the Millennials and Gen-Z, whose purchasing power and preferences will shape the wine category for the next 30-40 years. A typical Millennial is no more likely to have come across wine in a can than anyone else, but they are over 50% more likely to buy this format once they know about it; for Gen-Z members who have reached legal drinking age, they are twice as likely compared with drinkers generally to buy canned wine once they know it exists.

As to motivations for smaller formats, the data offers some new interpretations to add to familiar tropes about younger drinkers seeking control, portability, and moderation. While convenience is a key driver of can purchase, it is also seen as a low-risk, low-cost way of trialling new products or wine styles. In the end, the can could be as much about helping consumers on the discovery path in wine as it doubtless will be as a lightweight and portion-controlled alternative to a standard bottle.

RESEARCH METHODOLOGY: QUANTITATIVE

The data for this report was collected in the US in October 2017, October 2018 and July 2020

Data was gathered via Wine Intelligence's Vinitrac® online survey

Respondents were screened to ensure that they drink wine at least once a month; drink red, white, rosé or blush wine; and buy wine in the off-premise or in the on-premise

Invalid respondents (those who sped through the survey or gave inconsistent answers to selected questions) were removed before analysis

The data is representative of US regular wine drinkers in terms of gender, age and region

The distribution of the sample is shown in the table

		2017	2018	2020
	n=	2,003	2,000	2,000
Gender	Male	48%	50%	51%
	Female	52%	50%	49%
	Total	***100%***	***100%***	***100%***
Age	21-24	8%	8%	8%
	25-34	21%	22%	21%
	35-44	13%	14%	20%
	45-54	18%	18%	14%
	55-64	17%	18%	15%
	65 and over	22%	21%	22%
	Total	***100%***	***100%***	***100%***
US Divisions	New England	6%	6%	5%
	Middle Atlantic	16%	14%	15%
	East North Central	13%	13%	11%
	West North Central	6%	4%	7%
	South Atlantic	19%	20%	21%
	East South Central	4%	5%	4%
	West South Central	9%	11%	11%
	Mountain	7%	6%	7%
	Pacific	20%	21%	19%
	Total	***100%***	***100%***	***100%***

Source: Wine Intelligence Vinitrac® US, Oct'17 (n=2,003), Oct'18 (n=2,000) and Jul'20 (n=2,000) US regular wine drinkers

RESEARCH METHODOLOGY: QUALITITATIVE

MARKET EXPERT INTERVIEWEES

Trade Interviews were conducted with four experienced industry professionals in the US wine market in 2020

Interviews followed a pre-determined discussion guide, and covered overall market trends, opportunities for different wine styles, retail channels and pricing

The four interviewees were members of the wine trade working in different roles:

1 x Senior Director Insights

1 x Wine Marketing Specialist

1 x Wine Retailer

1 x Wine Brand Manager

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Wine Intelligence London (Head Office)

109 Maltings Place
169 Tower Bridge Road
London
SE1 3LJ

Telephone: +44 (0)20 8194 0090
Email: info@wineintelligence.com
Website: www.wineintelligence.com
Follow us: