WINE INTELLIGENCE

UK SOLA 2021:

Opportunities for Sustainable and Organic Wine in the UK Market

MARCH 2021

REPORT BROCHURE

PRICING

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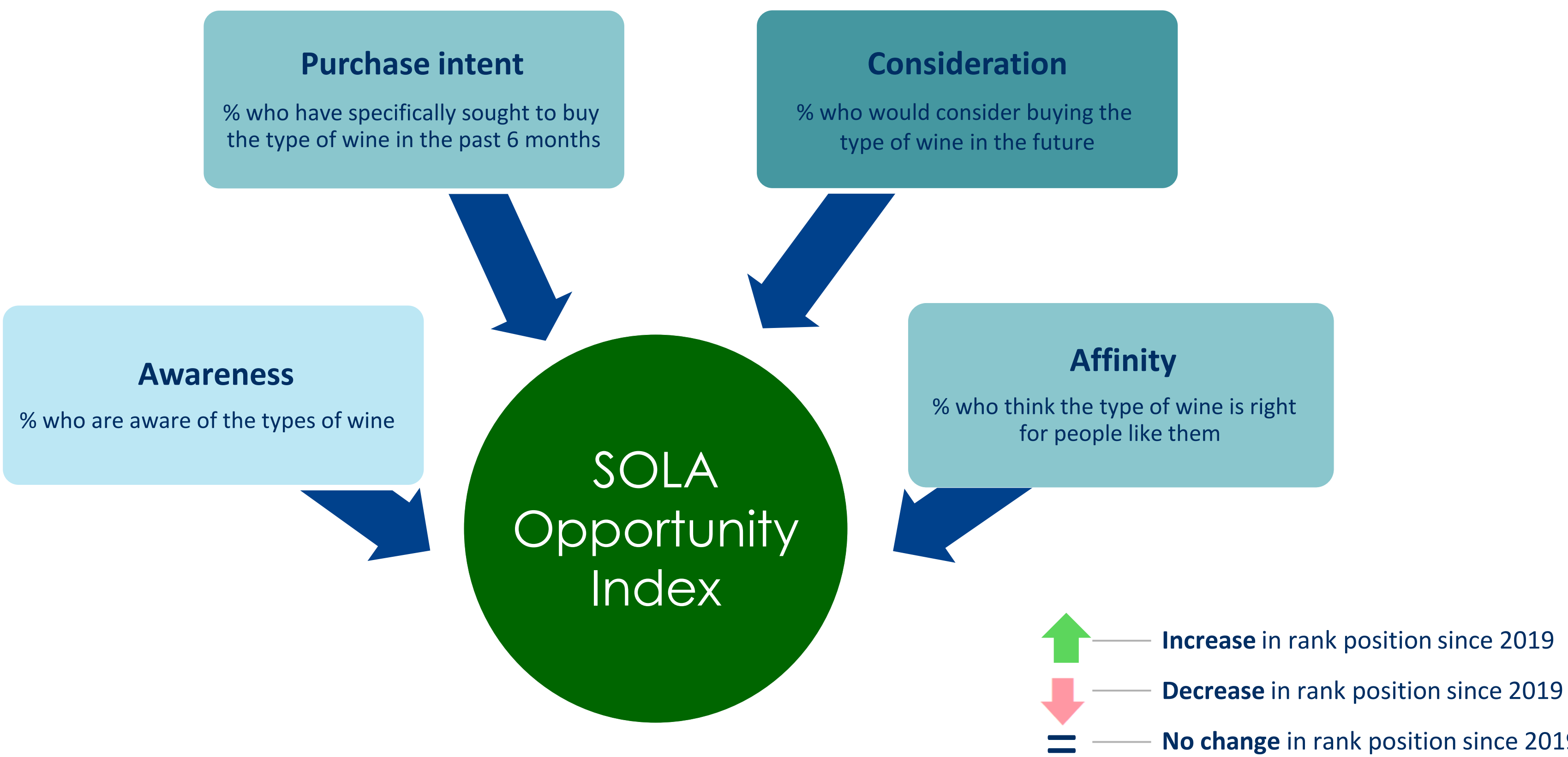
There is a separate report for Low / No Alcohol Wine Opportunities

CALCULATING THE SOLA WINE OPPORTUNITY INDEX

Using four measures (awareness, intent to purchase, purchase consideration and affinity) an index is created to show which alternative wine types have the strongest market opportunities

- The index is **weighted to reflect the size of the wine drinking population** in each market, enabling the SOLA wine opportunity index to be **reflective of the global market opportunity**

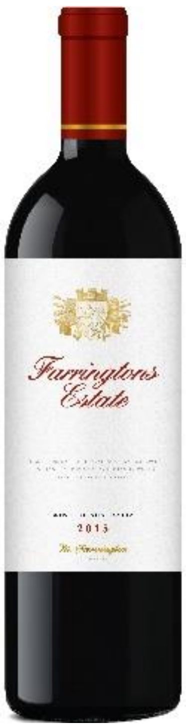


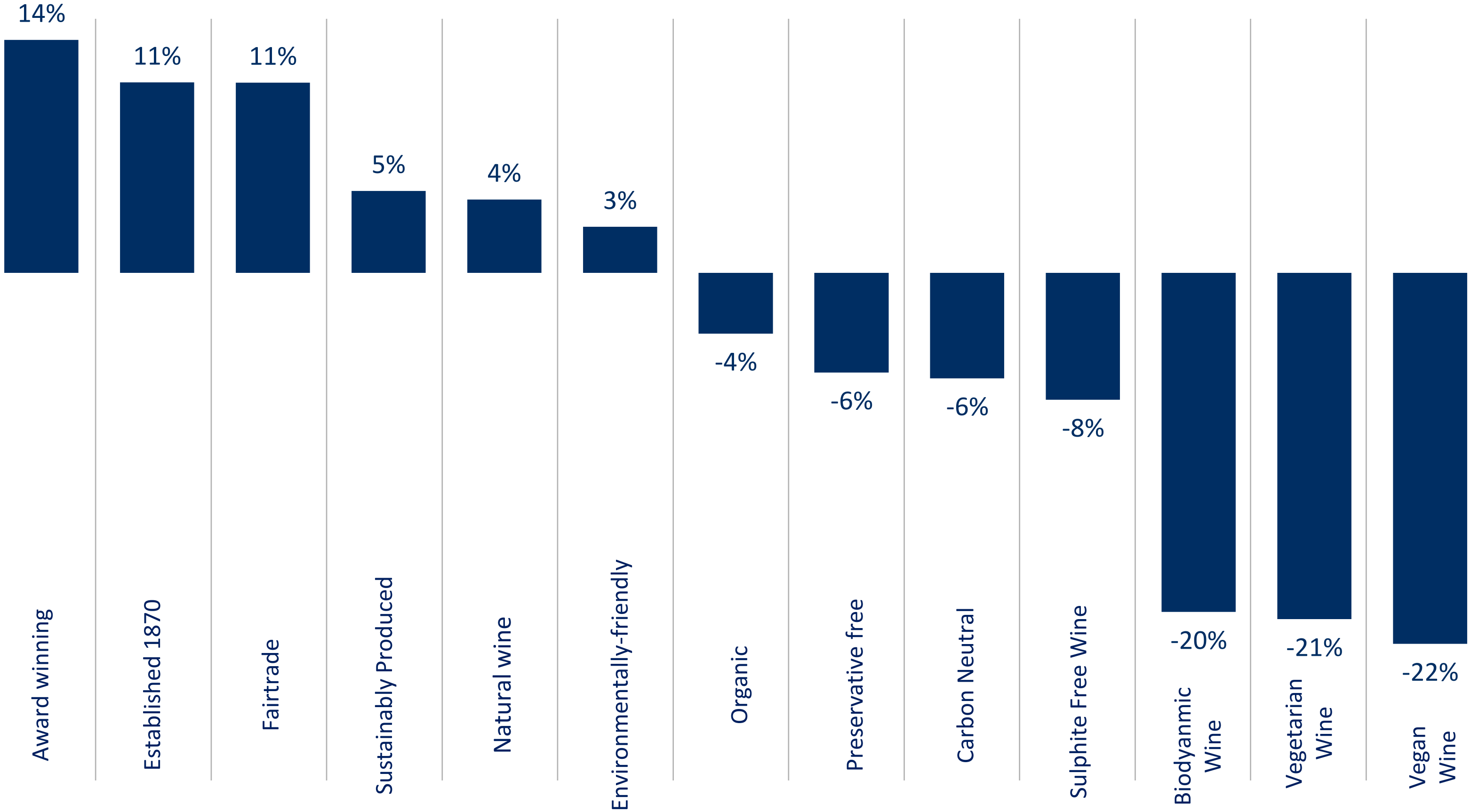
EXAMPLE SLIDE: NET PURCHASE INTENT OF WINE TYPES

Award-winning and heritage are habitually strong wine purchase cues; note that in many consumers' minds wine is 'natural', whether or not it meets the wine industry's internal definitions of that characterisation

Net intent to purchase: Net score compared with 'no claim'

% who would be likely or very likely to buy each wine minus those likely or very likely to buy the No Claim wine
Base = All UK regular wine drinkers (n=1,000)



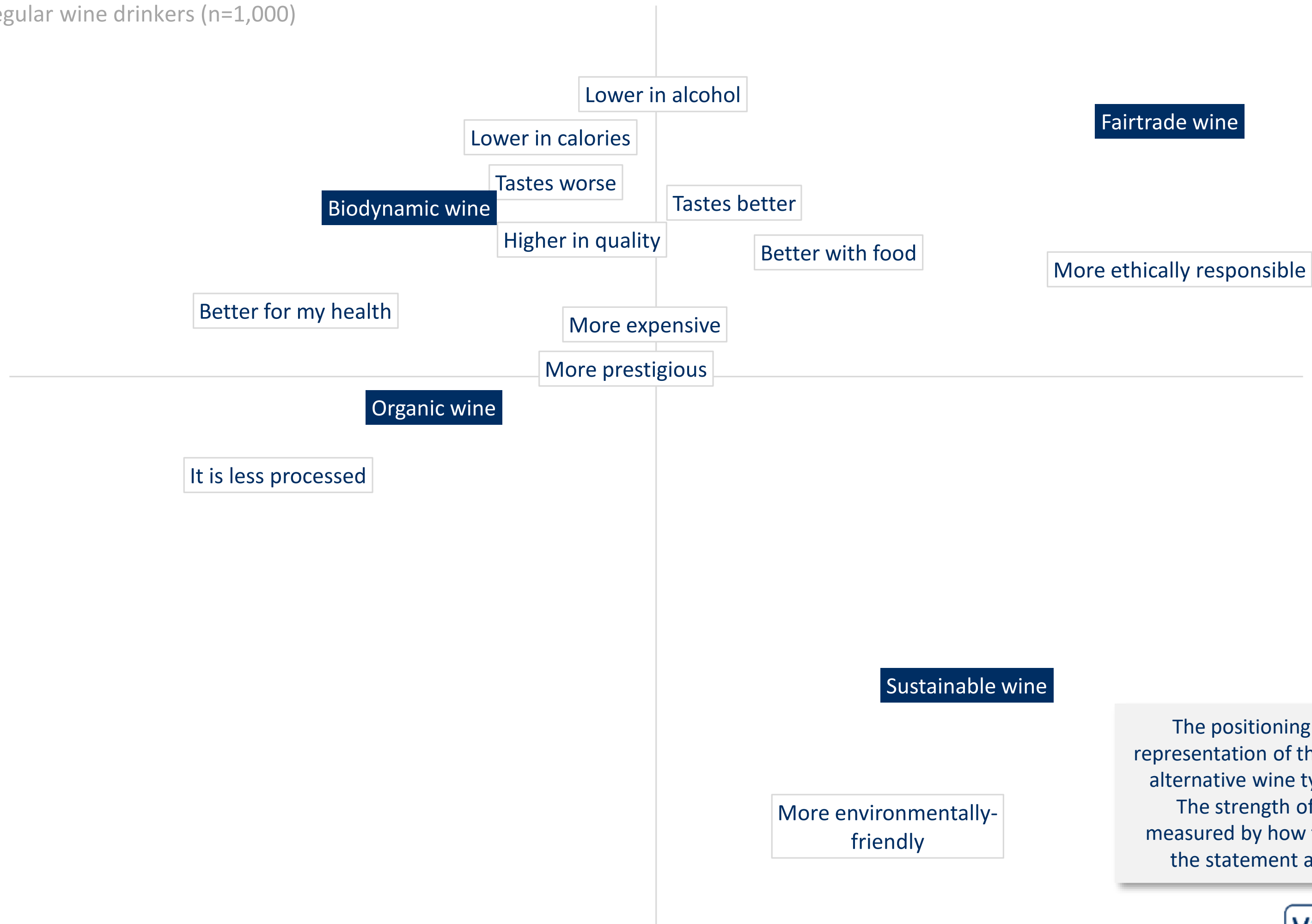


EXAMPLE SLIDE: ALTERNATIVE WINES ASSOCIATIONS

Organic wine is strongly associated with being better for one's health and less processed

Alternative wine associations: Imagery map

Base = All UK regular wine drinkers (n=1,000)



The positioning map is a graphical representation of the association between alternative wine types and statements. The strength of the association is measured by how far the wine type and the statement are from the centre

Source: Wine Intelligence, Vinitrac® UK, October 2020 (n=1,000), UK regular wine drinkers

UK RESEARCH METHODOLOGY: QUANTITATIVE

- The data was collected in the UK in March 2019
- The following wave October 2020 was tracked against March 2019
- Data was gathered via Wine Intelligence's Vinitrac® online survey
- Respondents were screened to ensure that they were at least 18 years old; drank red, white or rosé wine at least once a month; and bought wine in the off-trade or in the on-trade
- Invalid respondents (those who sped through the survey or gave inconsistent answers to selected questions) were removed before analysis
- The data is representative of UK regular wine drinkers in terms of gender, age, annual pre-tax household income and region
- The distribution of the sample is shown in the table:

			Mar-19	*Oct-20*
		n=	*1,000*	*1,000*
Gender	Male		48%	49%
	Female		52%	51%
	Total		***100%***	***100%***
Age	18-24		9%	7%
	25-34		16%	17%
	35-44		16%	17%
	45-54		16%	18%
	55-64		15%	13%
	65+		27%	27%
	Total		***100%***	***100%***
Annual household income before taxes	Under £20,000		12%	11%
	£20,000 - £29,999		17%	19%
	£30,000 - £39,999		19%	18%
	£40,000 - £59,999		19%	17%
	£60,000+		23%	23%
	Don't know / Refused		10%	13%
	Total		***100%***	***100%***
Region	North		21%	22%
	Midlands		17%	14%
	South East + East		23%	23%
	London		13%	14%
	South West		9%	11%
	Wales		5%	5%
	Scotland		9%	8%
	Northern Ireland		3%	3%
	Total		***100%***	***100%***

Source: Wine Intelligence, Vinitrac® UK, March 2019 and October 2020 (n= 1,000) UK regular wine drinkers

Other sources in the report include Wine Intelligence market experience, secondary sources and trade interviews.

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