WINE INTELLIGENCE

UK SOLA 2021:
Opportunities for Sustainable and Organic Wine in the UK Market

MARCH 2021

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Sustainable wine

Organic wine

Lower alcohol wine

Alternative wine

CONTENTS

06 **SOLA Global management summary**

11 **SOLA UK management summary**

17 **Attitudes towards sustainability**
- General attitudes towards sustainability
- Attitudes towards sustainability in wine

21 **SOLA Wine Opportunity Index**
- UK Alternative Wine Opportunity Index 2021
- UK Alternative Wine Opportunity Index: Tracking
- Alternative wines awareness, sought to purchase, consideration and affinity

30 **Net purchase intent of wine types**
- Net intent to purchase
- Net Intent to purchase: Tracking

35 **Alternative wines associations**
- Alternative wine associations: Imagery map
- Alternative wine associations
- Organic, Fairtrade, sustainable and biodynamic associations

43 **Methodology**
- SOLA opportunity report markets
- Quantitative

CONTENTS

06 **SOLA Global management summary**

11 **SOLA UK management summary**

17 **Attitudes towards sustainability**
- General attitudes towards sustainability
- Attitudes towards sustainability in wine

21 **SOLA Wine Opportunity Index**
- UK Alternative Wine Opportunity Index 2021
- UK Alternative Wine Opportunity Index: Tracking
- Alternative wines awareness, sought to purchase, consideration and affinity

30 **Net purchase intent of wine types**
- Net intent to purchase
- Net Intent to purchase: Tracking

35 **Alternative wines associations**
- Alternative wine associations: Imagery map
- Alternative wine associations
- Organic, Fairtrade, sustainable and biodynamic associations

43 **Methodology**
- SOLA opportunity report markets
- Quantitative

SOLA GLOBAL SUMMARY

GENERAL ATTITUDES TOWARDS SUSTAINABILITY

Concerns about climate change and buying local score highly in terms of general attitudes towards sustainability

Australian and Japanese consumers are more likely to expect brands they buy to support social causes, with US consumers more willing to seek out sustainable products in general

General attitudes towards sustainability: Global view

% who agrees with each of the following statements

	Global Weighted Score	Australia	Canada	Japan	Sweden	US	UK
Sample size n=	*9,215*	*1,000*	*1,013*	*1,000*	*500*	*2,000*	*1,000*
I worry about Climate Change and try to minimise my personal impact	**55%**	58%	62%	35%	48%	58%	58%
I try to buy food that is grown or produced locally (in the region where I live)	**54%**	63%	59%	44%	51%	56%	50%
I am willing to pay more for a product that is sustainably produced	**40%**	41%	36%	34%	41%	42%	41%
I always buy sustainable products where possible	**39%**	40%	32%	42%	39%	40%	38%
I expect the brands I buy to support social causes	**39%**	43%	34%	44%	34%	40%	40%
I am willing to give up convenience in return for a product that is sustainably produced	**38%**	41%	35%	30%	36%	41%	40%
I actively eat more / exclusively vegetarian or vegan food	**27%**	28%	26%	16%	29%	31%	29%

Red / Blue: Statistically significantly higher / lower than the global weighted score at a 95% confidence level

Source: Wine Intelligence, Vinitrac®, October 2020 (n≥500), Australian, Belgium, Canadian, Japanese, Dutch, Swedish, Swiss, UK and US regular wine drinkers

SOLA GLOBAL SUMMARY

ATTITUDES TOWARDS SUSTAINABILITY IN WINE

Consumers most strongly associate sustainable wine with protecting the environment and rely on official sustainability endorsement for reassurance; they also believe that glass bottles deliver a sustainable form of packaging

Attitudes towards sustainability in wine

% who agrees with each of the following statements
Base = All regular wine drinkers in Australia, Belgium, Canada, Japan, Netherlands, Sweden, Switzerland, UK and US (n≥500)

	Global
Sample size n=	*9,215*
Glass wine bottles are a sustainable form of wine packaging	**55%**
I only trust the sustainability of wines if they have official certification	**43%**
Wine is a more sustainable product compared with other drinks	**42%**
Sustainable wine has less chemicals than other wine	**39%**
I'm willing to pay more for sustainable wine	**37%**
Wine in a bag-in-box is a sustainable form of wine packaging	**35%**
I will always buy sustainable wines when given the choice	**33%**
Sustainable wine is always organically produced	**29%**

Top unprompted associations with sustainable wine

Size of words: Size of font proportional to weight of response
Base = All Australian, Canadian, UK and US regular wine drinkers (n ≥ 1,000)

SOLA GLOBAL SUMMARY

ATTITUDES TOWARDS SUSTAINABILITY IN WINE

Consumers in the higher volume wine producer markets of Australia and the US have stronger associations with wine being more sustainable compared with other beverages

Attitudes towards sustainability in wine: Global view

% who agrees with each of the following statements

	Global Weighted Score	Australia	Canada	Japan	Sweden	US	UK
Sample size n=	*9,215*	*1,000*	*1,013*	*1,000*	*500*	*2,000*	*1,000*
Glass wine bottles are a sustainable form of wine packaging	**55%**	61%	53%	44%	50%	55%	63%
I only trust the sustainability of wines if they have official certification	**43%**	47%	41%	35%	40%	44%	46%
Wine is a more sustainable product compared with other drinks	**42%**	46%	37%	44%	29%	45%	40%
Sustainable wine has less chemicals than other wine	**39%**	40%	34%	39%	37%	39%	38%
I'm willing to pay more for sustainable wine	**37%**	37%	32%	27%	39%	40%	39%
Wine in a bag-in-box is a sustainable form of wine packaging	**35%**	35%	31%	30%	37%	37%	36%
I will always buy sustainable wines when given the choice	**33%**	35%	28%	28%	32%	35%	33%
Sustainable wine is always organically produced	**29%**	33%	23%	33%	22%	31%	27%

Red / Blue: Statistically significantly higher / lower than the global weighted score at a 95% confidence level
Source: Wine Intelligence, Vinitrac®, October 2020 (n≥500), Australian, Belgium, Canadian, Japanese, Dutch, Swedish, Swiss, UK and US regular wine drinkers

SOLA GLOBAL SUMMARY

SOLA INDEX SCORE BY WINE TYPE

Organic wine holds its #1 rank in the global wine opportunity index amongst alternative wine types

Stable ranking of SOLA wine type opportunity in 2021 compared to 2019, although declines in the level of the opportunity for the majority of wine types

	Type of wine	Global SOLA wine opportunity index		
		2021 weighted opportunity index	2019 score difference	2019 rank difference
1st	Organic wine	47.9	-0.1	=
2nd	Sustainably produced wine	42.1	-2.1	=
3rd	Environmentally friendly wine	41.1	0.2	1 ↑
4th	Fairtrade wine	38.6	-2.7	-1 ↓
5th	Preservative free wine	37.3	-1.7	=
6th	Sulphite free wine	34.2	-2.7	=
7th	Wine from a carbon neutral winery	32.1	-0.5	=
8th	Lower alcohol wine	31.4	-0.2	=
9th	Orange / skin contact wine	27.6	-3.0	=
10th	Biodynamic wine	27.4	-1.2	=
11th	Non-alcoholic wine	24.9	-1.7	=
12th	Vegan wine	22.1	-3.5	=
13th	Vegetarian wine	21.8	1.5	=

= top 5 wine types per measure

Global SOLA wine opportunity index 2021
Source: Wine Intelligence, Vinitrac® 2019 (n=16,704) and 2020 (n=17,852) wine drinkers in Australia, Belgium, Brazil, Canada, Germany, France, Ireland, Japan, Netherlands, New Zealand, Portugal, South Korea, Spain, Sweden, Switzerland, UK and US global wine markets

CONTENTS

06 SOLA Global management summary

11 **SOLA UK management summary**

17 Attitudes towards sustainability
- General attitudes towards sustainability
- Attitudes towards sustainability in wine

21 SOLA Wine Opportunity Index
- UK Alternative Wine Opportunity Index 2021
- UK Alternative Wine Opportunity Index: Tracking
- Alternative wines awareness, sought to purchase, consideration and affinity

30 Net purchase intent of wine types
- Net intent to purchase
- Net Intent to purchase: Tracking

35 Alternative wines associations
- Alternative wine associations: Imagery map
- Alternative wine associations
- Organic, Fairtrade, sustainable and biodynamic associations

43 Methodology
- SOLA opportunity report markets
- Quantitative

SOLA UK SUMMARY

ATTITUDES TOWARDS SUSTAINABILITY

Concerns about climate change and buying local products is similar to the global pattern, but the UK has slightly lower desire to buy local vs the other markets in the study

The move towards reducing activities that contribute to climate change is led by higher involved wine drinkers in the UK

General attitudes towards sustainability

% who agree with each of the following statements

	Global Weighted Score	UK
Sample size n=	*9,215*	*1,000*
I worry about Climate Change and try to minimise my personal impact	**55%**	58%
I try to buy food that is grown or produced locally (in the region where I live)	**54%**	50%
I am willing to pay more for a product that is sustainably produced	**40%**	41%
I always buy sustainable products where possible	**39%**	38%
I expect the brands I buy to support social causes	**39%**	40%
I am willing to give up convenience in return for a product that is sustainably produced	**38%**	40%
I actively eat more / exclusively vegetarian or vegan food	**27%**	29%

Source: Wine Intelligence, Vinitrac® 2020 (n=17,852) wine drinkers in Australia, Belgium, Brazil, Canada, Germany, France, Ireland, Japan, Netherlands, New Zealand, Portugal, South Korea, Spain, Sweden, Switzerland, UK and US global wine markets

SOLA UK SUMMARY

ATTITUDES TOWARDS SUSTAINABILITY IN WINE

UK consumers most strongly associate sustainable wine with protecting the environment and being socially responsible

They are also more likely than wine drinkers in other markets to believe glass wine bottles to be a sustainable form of wine packaging

Top unprompted associations with sustainable wine

Size of words: Size of font proportional to weight of response
Base = All UK regular wine drinkers (n=1,000)

Attitudes towards sustainability in wine

% who agree with each of the following statements

	Global Weighted Score	UK
Sample size n=	*9,215*	*1,000*
Glass wine bottles are a sustainable form of wine packaging	**55%**	63%
I only trust the sustainability of wines if they have official certification	**43%**	46%
Wine is a more sustainable product compared with other drinks	**42%**	40%
Sustainable wine has less chemicals than other wine	**39%**	38%
I'm willing to pay more for sustainable wine	**37%**	39%
Wine in a bag-in-box is a sustainable form of wine packaging	**35%**	36%
I will always buy sustainable wines when given the choice	**33%**	33%
Sustainable wine is always organically produced	**29%**	27%

Source: Wine Intelligence, Vinitrac® 2020 (n=17,852) wine drinkers in Australia, Belgium, Brazil, Canada, Germany, France, Ireland, Japan, Netherlands, New Zealand, Portugal, South Korea, Spain, Sweden, Switzerland, UK and US global wine markets

SOLA UK SUMMARY

ALTERNATIVE WINE OPPORTUNITY INDEX

Fairtrade wine remains the #1 sustainable / alternative wine type in the UK market

- Similar to other key markets, there has been an increase in awareness of SOLA wines in the UK, along with increases in affinity for Fairtrade and environmentally friendly wine
- Higher involved wine drinkers in the UK have a significantly high awareness of SOLA wine types
- Younger wine drinkers are more motivated to seek to purchase SOLA wines

UK Alternative Wine Opportunity Index 2021

	Type of wine	Base = All sample	Base = Those who are aware of the following types of wine			2020 opportunity index	2019 opportunity index	2019 rank difference
		Awareness	Sought to purchase	Future purchase consideration	Affinity			
1st	Fairtrade wine	53%	24%	69%	64%	52.9	46.4	=
2nd	Organic wine	59%	15%	53%	44%	44.9	39.5	=
3rd	Sustainably produced wine	29%	23%	68%	61%	43.1	36.1	=
4th	Environmentally friendly wine	22%	27%	64%	59%	40.4	32.2	1 ↑
5th	Wine from a carbon-neutral winery	12%	24%	64%	56%	35.5	30.7	2 ↑
6th	Lower alcohol wine	61%	12%	31%	24%	35.5	34.2	-2 ↓
7th	Preservative free wine	17%	17%	63%	54%	34.8	31.3	-1 ↓
8th	Sulphite free wine	27%	13%	58%	45%	34.2	29.6	=
9th	Non-alcoholic wine	60%	9%	23%	17%	31.4	29.3	=
10th	Orange / skin contact wine	8%	33%	47%	39%	28.2	24.4	1 ↑
11th	Biodynamic wine	7%	29%	49%	41%	27.9	26.0	-1 ↓
12th	Vegan wine	28%	14%	40%	30%	27.5	24.2	=
13th	Vegetarian wine	18%	16%	40%	32%	25.1	22.0	=

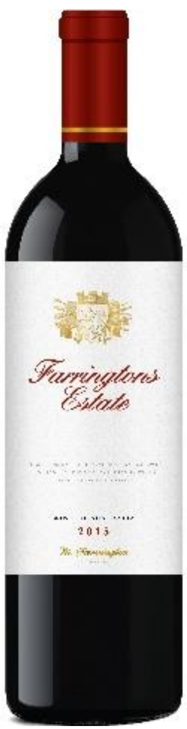
Source: Wine Intelligence, Vinitrac® UK, March 2019 and October 2020 (n= 1,000) UK regular wine drinkers

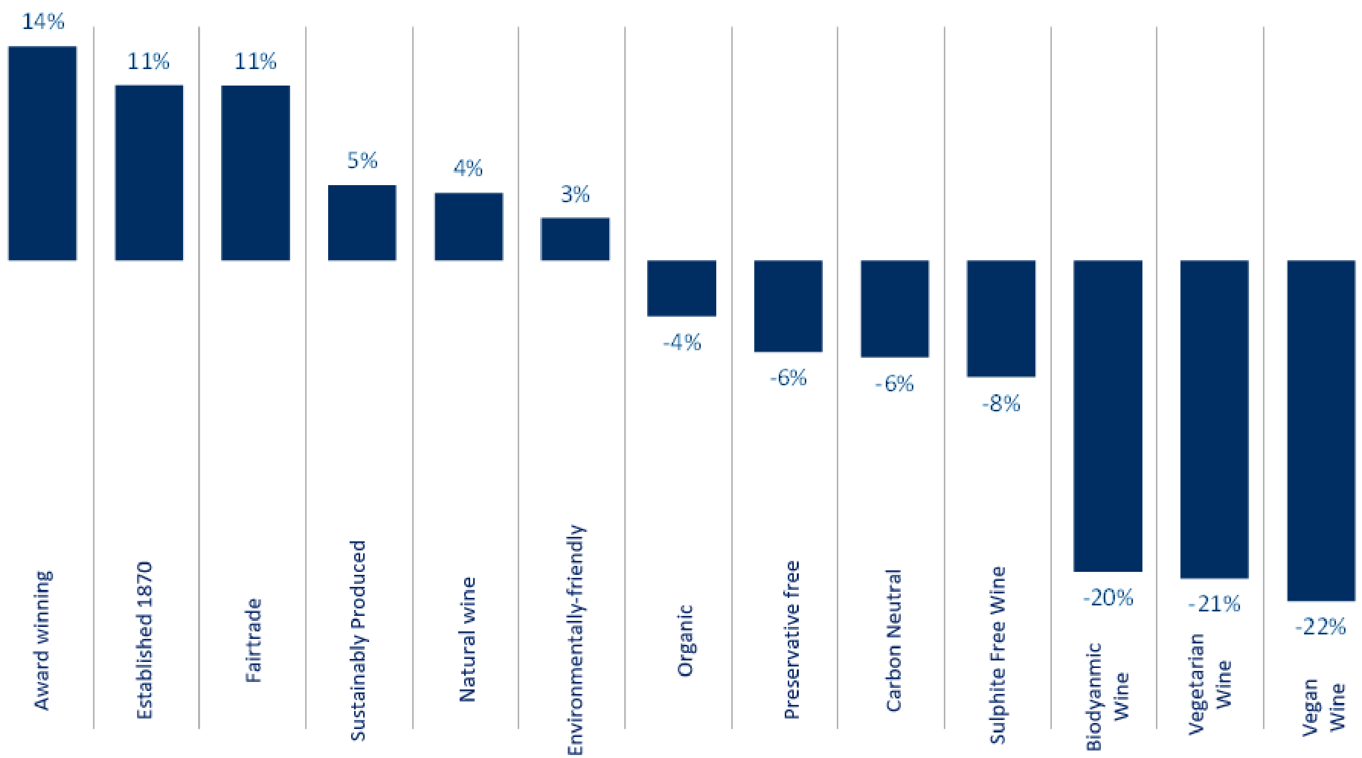
SOLA UK SUMMARY

INTENT TO PURCHASE COMPARED WITH CONTROL SAMPLE

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

% 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=2,000)





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

SOLA UK SUMMARY

ALTERNATIVE WINES ASSOCIATIONS

Organic wine is strongly associated with being less processed

- Fairtrade and sustainable wines are strongly associated with being more ethically responsible
- UK consumers deem organic wine as more expensive, more environmentally-friendly and less processed compared with other alternative wine types

Alternative wine associations

% who associate alternative wine with the following statements
Base = All UK regular wine drinkers (n=1,000)

	Organic Wine	Fairtrade Wine	Biodynamic Wine	Sustainable Wine
Sample size n=	*1,000*	*1,000*	*1,000*	*1,000*
More ethically responsible	29%	48%	15%	39%
More environmentally-friendly	33%	21%	17%	43%
More expensive	37%	26%	23%	27%
It is less processed	25%	8%	13%	13%
Better for my health	21%	8%	12%	10%
Higher in quality	16%	11%	10%	10%
Tastes better	13%	11%	8%	9%
Better with food	9%	9%	7%	8%
More prestigious	12%	7%	6%	8%
Lower in calories	8%	5%	7%	5%
Lower in alcohol	6%	6%	6%	5%
Tastes worse	6%	4%	6%	5%
None of these	19%	19%	40%	20%

Green = Relative strength within each wine type
Red = Relative weakness within each wine type

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

CONTENTS

06 SOLA Global management summary

11 SOLA UK management summary

17 **Attitudes towards sustainability**
- General attitudes towards sustainability
- Attitudes towards sustainability in wine

21 SOLA Wine Opportunity Index
- UK Alternative Wine Opportunity Index 2021
- UK Alternative Wine Opportunity Index: Tracking
- Alternative wines awareness, sought to purchase, consideration and affinity

30 Net purchase intent of wine types
- Net intent to purchase
- Net Intent to purchase: Tracking

35 Alternative wines associations
- Alternative wine associations: Imagery map
- Alternative wine associations
- Organic, Fairtrade, sustainable and biodynamic associations

43 Methodology
- SOLA opportunity report markets
- Quantitative

ATTITUDES TOWARDS SUSTAINABILITY IN GENERAL

There is a significantly higher connection with sustainability in general amongst highly involved wine drinkers, but also amongst younger drinkers (LDA-34 years old)

General attitudes towards sustainability: By gender, age and involvement

% who agrees with each of the following statements
Base = All UK regular wine drinkers (n=1,000)

		Gender		Age			Wine Involvement		
	All UK regular wine drinkers	Male	Female	18-34	35-54	55+	Low	Medium	High
n=	*1,000*	*495*	*505*	*244*	*352*	*403*	*255*	*370*	*375*
I worry about Climate Change and try to minimise my personal impact	58%	56%	61%	63%	57%	57%	39%	58%	72%
I try to buy food that is grown or produced locally (in the region where I live)	50%	49%	52%	55%	45%	52%	35%	47%	64%
I am willing to pay more for a product that is sustainably produced	41%	43%	40%	57%	43%	29%	23%	35%	60%
I expect the brands I buy to support social causes	40%	43%	37%	56%	40%	30%	20%	36%	58%
I am willing to give up convenience in return for a product that is sustainably produced	40%	42%	37%	53%	40%	31%	19%	37%	57%
I always buy sustainable products where possible	38%	41%	35%	53%	39%	28%	20%	35%	54%
I actively eat more / exclusively vegetarian or vegan food	29%	31%	26%	48%	31%	15%	17%	22%	43%

Red / Blue: Statistically significantly higher / lower than all UK regular wine drinkers at a 95% confidence level
Source: Wine Intelligence, Vinitrac® UK, October 2020 (n=1,000), UK regular wine drinkers

ATTITUDES TOWARDS SUSTAINABILITY IN WINE

UK consumers most strongly associate sustainable wine with protecting the environment and being socially responsible; they are also more likely to believe glass wine bottles to be a sustainable form of wine packaging

Top unprompted associations with sustainable wine

Size of words: Size of font proportional to weight of response
Base = All UK regular wine drinkers (n=1,000)

Attitudes towards sustainability in wine: Global view

% who agrees with each of the following statements
Base = All regular wine drinkers in Australia, Belgium, Canada, Japan, Netherlands, Sweden, Switzerland, UK and US (n≥500)

	Global Weighted Score	UK
Sample size n=	*9,215*	*1,000*
Glass wine bottles are a sustainable form of wine packaging	**55%**	63%
I only trust the sustainability of wines if they have official certification	**43%**	46%
Wine is a more sustainable product compared with other drinks	**42%**	40%
Sustainable wine has less chemicals than other wine	**39%**	38%
I'm willing to pay more for sustainable wine	**37%**	39%
Wine in a bag-in-box is a sustainable form of wine packaging	**35%**	36%
I will always buy sustainable wines when given the choice	**33%**	33%
Sustainable wine is always organically produced	**29%**	27%

Red / Blue: Statistically significantly higher / lower than the global weighted score at a 95% confidence level
Source: Wine Intelligence, Vinitrac®, October 2020 (n≥500), Australian, Belgium, Canadian, Japanese, Dutch, Swedish, Swiss, UK and US regular wine drinkers

ATTITUDES TOWARDS SUSTAINABILITY IN WINE

There is a significantly higher connection with sustainable wine amongst higher involved wine drinkers, but also amongst younger drinkers aged under 35

Attitudes towards sustainability in wine: By gender, age and involvement

% who agrees with each of the following statements
Base = All UK regular wine drinkers (n=1,000)

		Gender		Age			Wine Involvement		
	All UK regular wine drinkers	Male	Female	18-34	35-54	55+	Low	Medium	High
n=	*1,000*	*495*	*505*	*244*	*352*	*403*	*255*	*370*	*375*
Glass wine bottles are a sustainable form of wine packaging	63%	64%	62%	58%	60%	68%	52%	59%	75%
I only trust the sustainability of wines if they have official certification	46%	48%	45%	59%	45%	39%	30%	40%	63%
Wine is a more sustainable product compared with other drinks	40%	44%	36%	50%	39%	35%	20%	34%	56%
I'm willing to pay more for sustainable wine	39%	41%	36%	58%	43%	24%	22%	32%	54%
Sustainable wine has less chemicals than other wine	38%	42%	33%	54%	37%	29%	19%	33%	51%
Wine in a bag-in-box is a sustainable form of wine packaging	36%	40%	33%	48%	37%	29%	17%	31%	47%
I will always buy sustainable wines when given the choice	33%	38%	29%	53%	32%	23%	17%	31%	47%
Sustainable wine is always organically produced	27%	30%	23%	42%	29%	15%	14%	22%	40%

Red / Blue: Statistically significantly higher / lower than all UK regular wine drinkers at a 95% confidence level
Source: Wine Intelligence, Vinitrac® UK, October 2020 (n=1,000), UK regular wine drinkers

CONTENTS

06 SOLA Global management summary

11 SOLA UK management summary

17 Attitudes towards sustainability
- General attitudes towards sustainability
- Attitudes towards sustainability in wine

21 **SOLA Wine Opportunity Index**
- UK Alternative Wine Opportunity Index 2021
- UK Alternative Wine Opportunity Index: Tracking
- Alternative wines awareness, sought to purchase, consideration and affinity

30 Net purchase intent of wine types
- Net intent to purchase
- Net Intent to purchase: Tracking

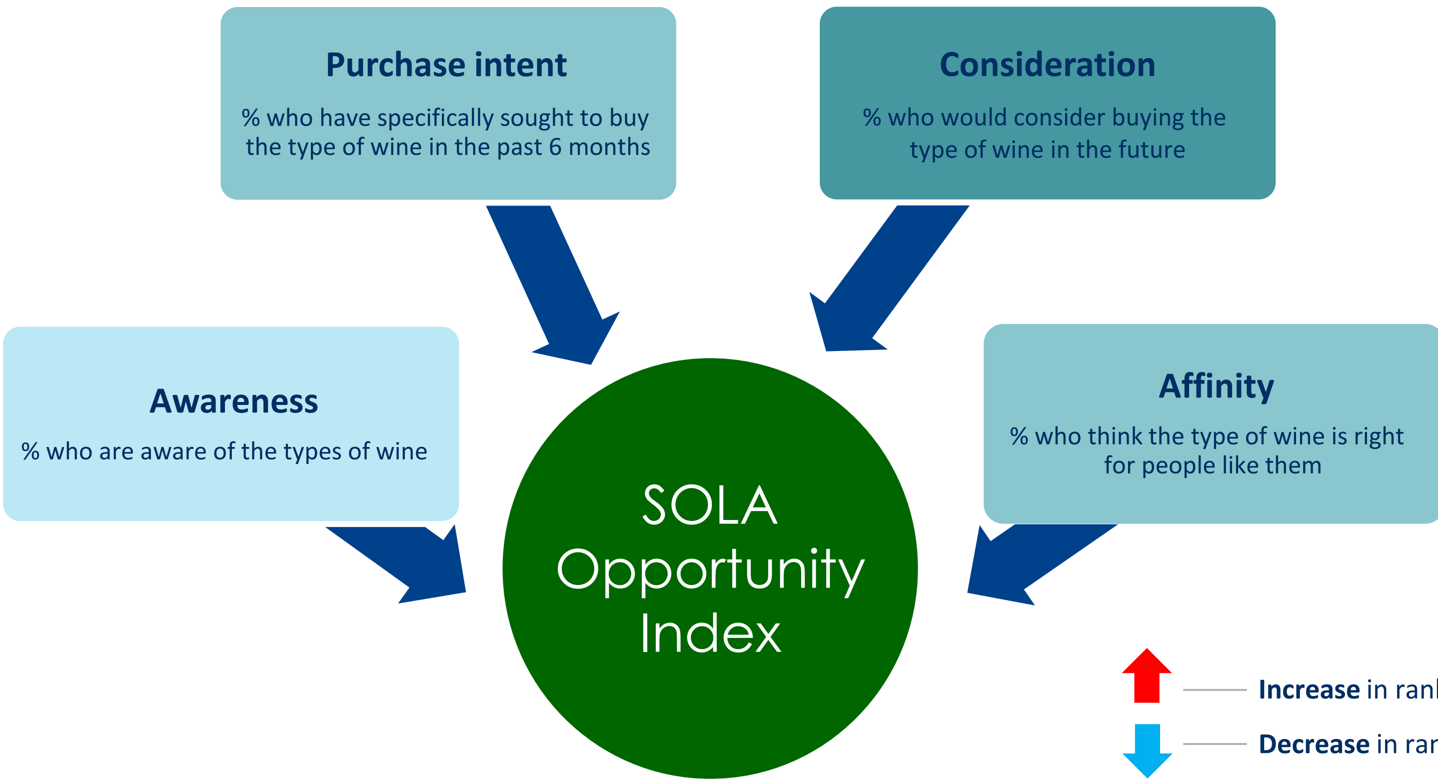
35 Alternative wines associations
- Alternative wine associations: Imagery map
- Alternative wine associations
- Organic, Fairtrade, sustainable and biodynamic associations

43 Methodology
- SOLA opportunity report markets
- Quantitative

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**



Increase in rank position since 2019

Decrease in rank position since 2019

No change in rank position since 2019

ALTERNATIVE WINE OPPORTUNITY INDEX BY WINE TYPE 2021

Stable ranking for the majority of SOLA wine types in 2021 compared with 2019; increases in the level of opportunity for all wine types owing to increased awareness in the UK market

UK Alternative Wine Opportunity Index 2021

	Type of wine	UK SOLA wine opportunity index		
		2021 weighted opportunity index	2019 score difference	2019 rank difference
1st	Fairtrade wine	52.9	6.5	=
2nd	Organic wine	44.9	5.4	=
3rd	Sustainably produced wine	43.1	7.1	=
4th	Environmentally friendly wine	40.4	8.1	1⬆
5th	Wine from a carbon-neutral winery	35.5	4.8	2⬆
6th	Lower alcohol wine	35.5	1.3	-2⬇
7th	Preservative free wine	34.8	3.5	-1⬇
8th	Sulphite free wine	34.2	4.6	=
9th	Non-alcoholic wine	31.4	2.1	=
10th	Orange / skin contact wine	28.2	3.7	1⬆
11th	Biodynamic wine	27.9	1.9	-1⬇
12th	Vegan wine	27.5	3.3	=
13th	Vegetarian wine	25.1	3.1	=

= top 5 wine types per measure

⬆ / ⬇ : Statistically significantly higher / lower than the March 2019 wave at a 95% confidence level

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

ALTERNATIVE WINE OPPORTUNITY INDEX 2021

Fairtrade wine remains the #1 sustainable / alternative wine type in the UK market opportunity index

UK Alternative Wine Opportunity Index 2021

	Type of wine	Awareness (Base = All sample)	Sought to purchase (Base = Those who are aware of the following types of wine)	Future purchase consideration (Base = Those who are aware of the following types of wine)	Affinity (Base = Those who are aware of the following types of wine)	2020 opportunity index	2019 opportunity index	2019 rank difference
1st	Fairtrade wine	53%	24%	69%	64%	52.9	46.4	=
2nd	Organic wine	59%	15%	53%	44%	44.9	39.5	=
3rd	Sustainably produced wine	29%	23%	68%	61%	43.1	36.1	=
4th	Environmentally friendly wine	22%	27%	64%	59%	40.4	32.2	1⬆
5th	Wine from a carbon-neutral winery	12%	24%	64%	56%	35.5	30.7	2⬆
6th	Lower alcohol wine	61%	12%	31%	24%	35.5	34.2	-2⬇
7th	Preservative free wine	17%	17%	63%	54%	34.8	31.3	-1⬇
8th	Sulphite free wine	27%	13%	58%	45%	34.2	29.6	=
9th	Non-alcoholic wine	60%	9%	23%	17%	31.4	29.3	=
10th	Orange / skin contact wine	8%	33%	47%	39%	28.2	24.4	1⬆
11th	Biodynamic wine	7%	29%	49%	41%	27.9	26.0	-1⬇
12th	Vegan wine	28%	14%	40%	30%	27.5	24.2	=
13th	Vegetarian wine	18%	16%	40%	32%	25.1	22.0	=

⬆ / ⬇ : Statistically significantly higher / lower than the March 2019 wave at a 95% confidence level

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

ALTERNATIVE WINE OPPORTUNITY INDEX

Similar to other key markets, there has been an increase in awareness of SOLA wines in the UK, along with increases in affinity for Fairtrade and Environmentally Friendly wine

UK Alternative Wine Opportunity Index: Tracking

Type of wine	Base = All sample			Base = Those who are aware of organic wine								
	Awareness			Sought to Purchase			Consideration			Affinity		
	2019	2020	1-year tracking	2019	2020	1-year tracking	2019	2020	1-year tracking	2019	2020	1-year tracking
Fairtrade wine	45%	53%	↑	20%	24%	→	63%	69%	↑	58%	64%	↑
Organic wine	51%	59%	↑	12%	15%	→	49%	53%	→	40%	44%	→
Sustainably produced wine	17%	29%	↑	18%	23%	→	63%	68%	→	56%	61%	→
Environmentally friendly wine	13%	22%	↑	25%	27%	→	55%	64%	→	48%	59%	↑
Wine from a carbon-neutral winery	5%	12%	↑	20%	24%	→	66%	64%	→	51%	56%	→
Lower alcohol wine	53%	61%	↑	14%	12%	→	33%	31%	→	27%	24%	→
Preservative free wine	11%	17%	↑	14%	17%	→	56%	63%	→	54%	54%	→
Sulphite free wine	20%	27%	↑	14%	13%	→	49%	58%	→	41%	45%	→
Non-alcoholic wine	54%	60%	↑	9%	9%	→	23%	23%	→	17%	17%	→
Orange / skin contact wine	4%	8%	↑	29%	33%	→	44%	47%	→	35%	39%	→
Biodynamic wine	5%	7%	↑	18%	29%	→	43%	49%	→	47%	41%	→
Vegan wine	17%	28%	↑	17%	14%	→	34%	40%	→	33%	30%	→
Vegetarian wine	15%	18%	↑	13%	16%	→	32%	40%	→	31%	32%	→

: sample size < 50
↑ / ↓ : Statistically significantly higher / lower than the March 2019 wave at a 95% confidence level
Source: Wine Intelligence, Vinitrac® UK, March 2019 and October 2020 (n= 1,000) UK regular wine drinkers

ALTERNATIVE WINES AWARENESS

Higher involved wine drinkers in the UK have a significantly high awareness of SOLA wine types

Alternative wines awareness: Gender, age and wine involvement

% who are aware of the following types of wine
Base = All UK regular wine drinkers (n=1,000)

		Gender		Age			Wine Involvement		
	All UK regular wine drinkers	Male	Female	18-34	35-54	55+	Low	Medium	High
n=	*1,000*	*495*	*505*	*244*	*352*	*403*	*255*	*370*	*375*
Organic wine	59%	56%	63%	47%	60%	67%	48%	60%	66%
Fairtrade wine	53%	51%	54%	40%	55%	58%	39%	56%	59%
Sustainably produced wine	29%	31%	26%	28%	26%	31%	17%	26%	40%
Vegan wine	28%	25%	30%	32%	30%	24%	16%	24%	40%
Sulphite free wine	27%	28%	27%	25%	26%	29%	20%	26%	33%
Environmentally friendly wine	22%	24%	20%	30%	19%	19%	11%	18%	34%
Vegetarian wine	18%	17%	19%	20%	18%	18%	8%	17%	26%
Preservative free wine	17%	19%	15%	18%	17%	16%	6%	17%	24%
Wine from a carbon-neutral winery	12%	16%	9%	21%	12%	7%	4%	10%	20%
Orange / skin contact wine	8%	10%	7%	13%	9%	5%	2%	6%	15%
Biodynamic wine	7%	9%	5%	12%	8%	3%	2%	7%	11%
None of these	8%	9%	6%	7%	8%	9%	14%	6%	5%

Red / Blue: Statistically significantly higher / lower than all UK regular wine drinkers at a 95% confidence level
Source: Wine Intelligence, Vinitrac® UK, October 2020 (n=1,000), UK regular wine drinkers

ALTERNATIVE WINES SOUGHT TO PURCHASE

Older wine drinkers (55+) are less motivated to seek to purchase SOLA alternative wine types

Alternative wines sought to purchase

% who have sought to purchase the following types of wine in the past 6 months
Base = Those who are aware of the following types of wine

		Gender		Age			Wine Involvement		
	Those who are aware of the following types of wine	Male	Female	18-34	35-54	55+	Low	Medium	High
Orange / skin contact wine	33%	38%	26%	52%	28%	10%	44%	19%	39%
Biodynamic wine	29%	35%	18%	35%	33%	7%	23%	16%	38%
Environmentally friendly wine	27%	35%	18%	42%	28%	13%	10%	31%	29%
Wine from a carbon-neutral winery	24%	26%	22%	39%	20%	3%	14%	16%	30%
Fairtrade wine	24%	31%	18%	40%	21%	20%	10%	19%	35%
Sustainably produced wine	23%	22%	23%	36%	26%	13%	7%	22%	27%
Preservative free wine	17%	23%	9%	24%	22%	7%	6%	12%	22%
Vegetarian wine	16%	17%	14%	28%	18%	5%	9%	12%	19%
Organic wine	15%	20%	10%	32%	17%	6%	8%	10%	22%
Vegan wine	14%	17%	11%	20%	14%	8%	10%	6%	19%
Sulphite free wine	13%	13%	12%	17%	14%	9%	8%	11%	16%
None of these	60%	52%	68%	39%	58%	75%	79%	63%	46%

: sample size < 50
Red / Blue: Statistically significantly higher / lower than all UK regular wine drinkers at a 95% confidence level
Source: Wine Intelligence, Vinitrac® UK, October 2020 (n=1,000), UK regular wine drinkers

ALTERNATIVE WINES CONSIDERATION

There is less future consideration for organic wine amongst older and lower involved wine consumers

Alternative wines consideration

% who would consider purchasing the following types of wine in the future
Base = Those who are aware of the following types of wine

		Gender		Age			Wine Involvement		
	Those who are aware of the following types of wine	Male	Female	18-34	35-54	55+	Low	Medium	High
Fairtrade wine	69%	75%	64%	77%	73%	64%	64%	67%	74%
Sustainably produced wine	68%	68%	68%	78%	67%	64%	56%	67%	72%
Wine from a carbon-neutral winery	64%	58%	75%	67%	60%	63%	55%	66%	64%
Environmentally friendly wine	64%	66%	61%	63%	70%	60%	46%	61%	69%
Preservative free wine	63%	62%	64%	75%	60%	57%	55%	63%	64%
Sulphite free wine	58%	57%	58%	62%	62%	52%	50%	60%	60%
Organic wine	53%	55%	51%	66%	58%	43%	40%	53%	60%
Biodynamic wine	49%	54%	40%	44%	54%	48%	68%	49%	46%
Orange / skin contact wine	47%	45%	49%	53%	54%	24%	19%	24%	59%
Vegetarian wine	40%	37%	43%	56%	40%	29%	37%	32%	46%
Vegan wine	40%	43%	37%	56%	40%	26%	35%	34%	45%
None of these	25%	21%	28%	15%	21%	34%	37%	25%	17%

: sample size < 50
Red / Blue: Statistically significantly higher / lower than all UK regular wine drinkers at a 95% confidence level
Source: Wine Intelligence, Vinitrac® UK, October 2020 (n=1,000), UK regular wine drinkers

ALTERNATIVE WINES AFFINITY

There is stronger affinity for organic wine amongst under 35s and higher involved wine drinkers

Alternative wines affinity

% who think the following types of wine are right for people like them
Base = Those who are aware of the following types of wine

		Gender		Age			Wine Involvement		
	Those who are aware of the following types of wine	Male	Female	18-34	35-54	55+	Low	Medium	High
Fairtrade wine	64%	68%	60%	66%	68%	60%	59%	60%	70%
Sustainably produced wine	61%	60%	63%	65%	64%	57%	55%	58%	65%
Environmentally friendly wine	59%	61%	56%	59%	68%	51%	55%	50%	65%
Wine from a carbon-neutral winery	56%	56%	56%	65%	51%	49%	45%	56%	58%
Preservative free wine	54%	53%	54%	57%	56%	50%	40%	60%	52%
Sulphite free wine	45%	46%	44%	54%	52%	35%	41%	43%	48%
Organic wine	44%	47%	41%	56%	49%	35%	32%	41%	53%
Biodynamic wine	41%	47%	29%	42%	49%	20%	21%	44%	42%
Orange / skin contact wine	39%	42%	34%	51%	40%	15%	44%	14%	49%
Vegetarian wine	32%	29%	34%	45%	27%	27%	28%	27%	36%
Vegan wine	30%	35%	26%	40%	34%	18%	31%	24%	33%
None of these	29%	24%	34%	17%	26%	39%	43%	29%	21%

: sample size < 50
Red / Blue: Statistically significantly higher / lower than all UK regular wine drinkers at a 95% confidence level
Source: Wine Intelligence, Vinitrac® UK, October 2020 (n=1,000), UK regular wine drinkers

CONTENTS

06 SOLA Global management summary

11 SOLA UK management summary

17 Attitudes towards sustainability
- General attitudes towards sustainability
- Attitudes towards sustainability in wine

21 SOLA Wine Opportunity Index
- UK Alternative Wine Opportunity Index 2021
- UK Alternative Wine Opportunity Index: Tracking
- Alternative wines awareness, sought to purchase, consideration and affinity

30 **Net purchase intent of wine types**
- Net intent to purchase
- Net Intent to purchase: Tracking

35 Alternative wines associations
- Alternative wine associations: Imagery map
- Alternative wine associations
- Organic, Fairtrade, sustainable and biodynamic associations

43 Methodology
- SOLA opportunity report markets
- Quantitative

PURCHASE INTENT: BASED ON CLAIMS ON WINE LABELS

Bottle with **no claim** tested against bottles shown **with claims;** to avoid any bias, the claims were shown as below, in a randomised order, and without any attention being drawn to them

Bottles tested in the UK:

No Claim Bottle

Fairtrade

Sulphite Free Wine

Award winning

Sustainably Produced

Environmentally-friendly

Natural Wine

Established 1870

Biodynamic Wine

Carbon Neutral

Vegan Wine

Preservative Free

Vegetarian Wine

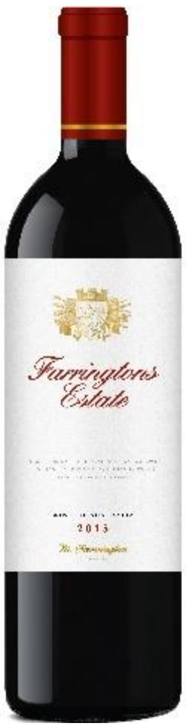
Organic

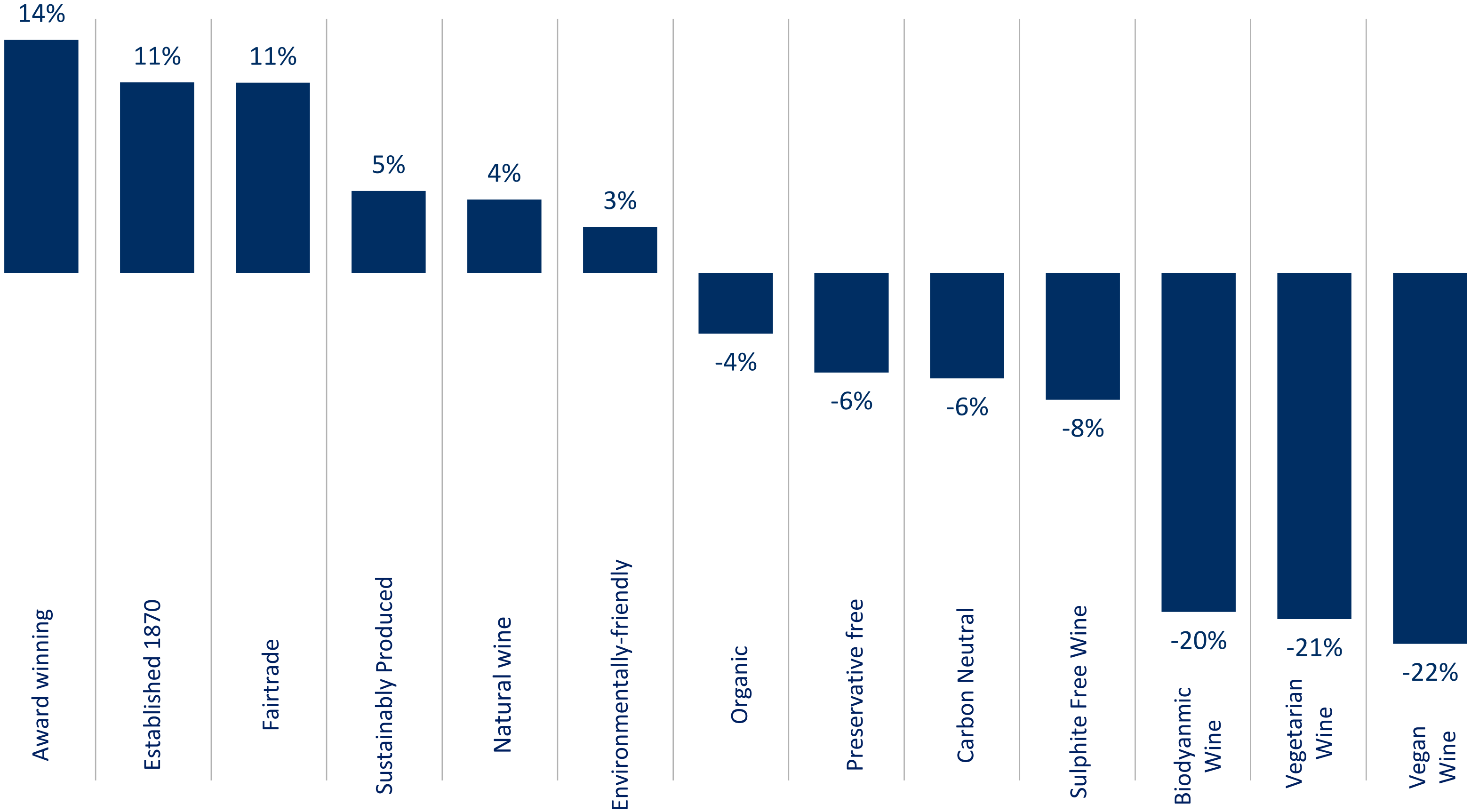
NET PURCHASE INTENT OF WINE TYPES

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)





PURCHASE INTENT OF WINE TYPES

Younger consumers and those with a higher involvement with wine have a higher net purchase intent for SOLA and alternative wines

Intent to purchase: By gender and age

% who would be likely or very likely to purchase the following wines
Base = All UK regular wine drinkers (n=1,000)

		Gender		Age			Wine Involvement		
	All UK regular wine drinkers	Male	Female	18-34	35-54	55+	Low	Medium	High
n=	*1,000*	*495*	*505*	*244*	*352*	*403*	*255*	*370*	*375*
Award Winning	61%	65%	57%	63%	68%	53%	47%	57%	74%
Established 1870	58%	60%	56%	70%	59%	50%	39%	56%	75%
Fairtrade	58%	61%	56%	66%	58%	53%	41%	55%	72%
Sustainably Produced	52%	56%	47%	58%	55%	44%	34%	46%	70%
Natural Wine	51%	58%	44%	65%	51%	42%	36%	46%	66%
Environmentally Friendly	50%	52%	47%	59%	54%	40%	32%	48%	64%
No Claim Bottle	47%	52%	42%	54%	51%	38%	38%	42%	57%
Organic	43%	46%	40%	55%	50%	31%	28%	39%	55%
Preservative Free	41%	45%	37%	54%	42%	32%	30%	37%	52%
Carbon Neutral	40%	46%	35%	54%	47%	27%	24%	37%	54%
Sulphite Free Wine	39%	44%	35%	50%	43%	31%	27%	34%	54%
Biodynamic Wine	26%	31%	22%	38%	32%	13%	13%	23%	39%
Vegetarian Wine	26%	29%	23%	43%	29%	12%	13%	23%	37%
Vegan Wine	24%	29%	20%	43%	28%	11%	12%	19%	38%

Red / Blue: Statistically significantly higher / lower than all UK regular wine drinkers at a 95% confidence level
Source: Wine Intelligence, Vinitrac® UK, October 2020 (n=1,000), UK regular wine drinkers

NET PURCHASE INTENT OF WINE TYPES

Net purchase intent for SOLA and alternative wines has increased for most wine types since March 2019

Net Intent to purchase: Tracking vs March 2019

% who would be likely or very likely to purchase the following wines
Base = All UK regular wine drinkers (n=1,000)

		2019	2020	Tracking
	n=	*1,000*	*1,000*	vs. '19
1	Award Winning	47%	61%	↑
2	Established 1870	40%	58%	↑
3	Fairtrade	48%	58%	↑
4	Sustainably Produced	44%	52%	↑
5	Natural Wine	37%	51%	↑
6	Environmentally Friendly	43%	50%	↑
7	Organic	37%	43%	↑
8	Preservative Free	38%	41%	→
9	Carbon Neutral	29%	40%	↑
10	Sulphite Free Wine	36%	39%	→
11	Biodynamic Wine	24%	26%	→
12	Vegetarian Wine	20%	26%	↑
13	Vegan Wine	23%	24%	→

Red / Blue: Statistically significantly higher / lower than all UK regular wine drinkers at a 95% confidence level
Source: Wine Intelligence, Vinitrac® UK, October 2020 (n=1,000), UK regular wine drinkers

CONTENTS

06 SOLA Global management summary

11 SOLA UK management summary

17 Attitudes towards sustainability
- General attitudes towards sustainability
- Attitudes towards sustainability in wine

21 SOLA Wine Opportunity Index
- UK Alternative Wine Opportunity Index 2021
- UK Alternative Wine Opportunity Index: Tracking
- Alternative wines awareness, sought to purchase, consideration and affinity

30 Net purchase intent of wine types
- Net intent to purchase
- Net Intent to purchase: Tracking

35 Alternative wines associations
- Alternative wine associations: Imagery map
- Alternative wine associations
- Organic, Fairtrade, sustainable and biodynamic associations

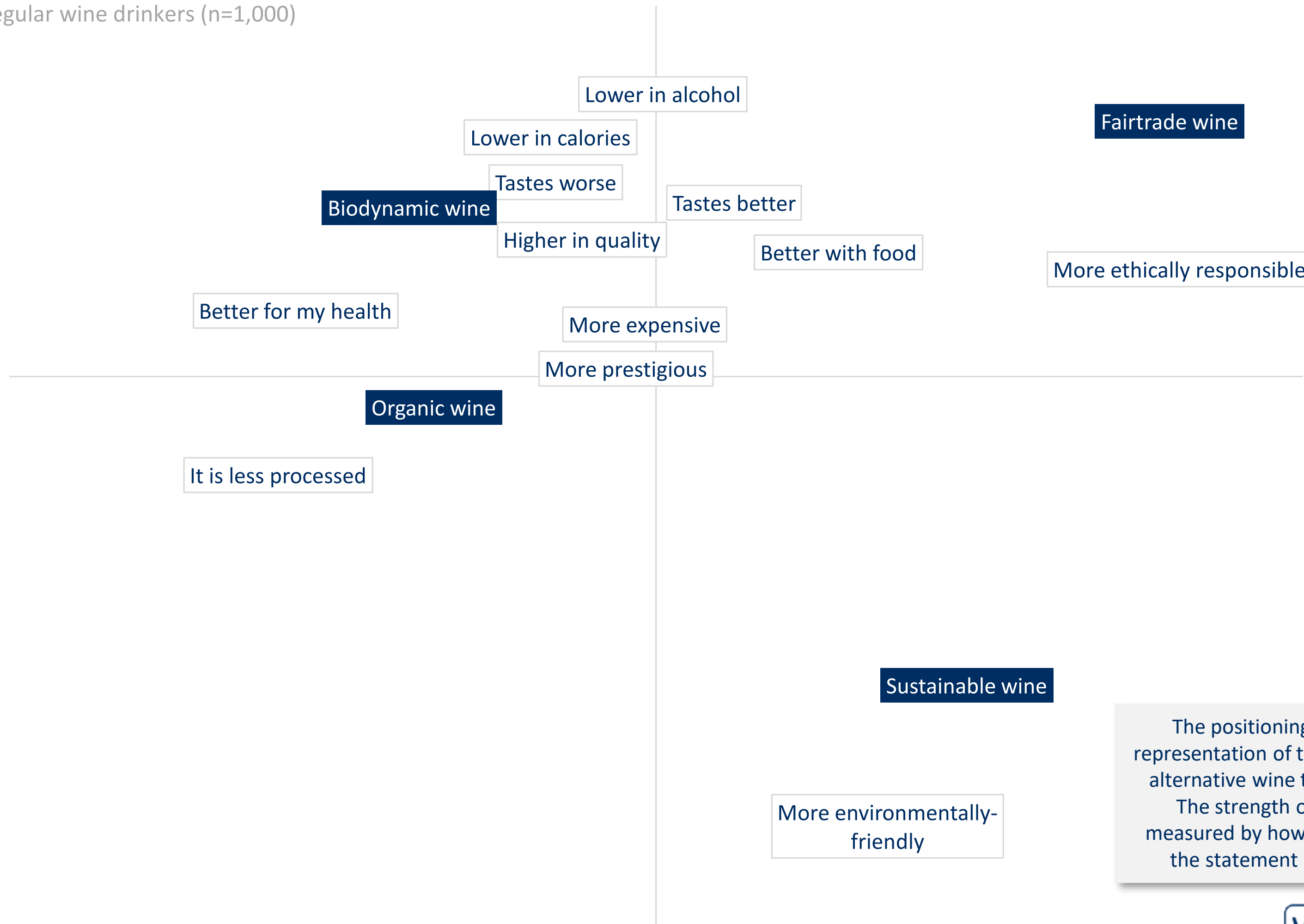
43 Methodology
- SOLA opportunity report markets
- Quantitative

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

ALTERNATIVE WINES ASSOCIATIONS

Fairtrade and sustainable wines are strongly associated with being more ethically responsible compared with other wine types

Alternative wine associations

% who associate alternative wine with the following statements
Base = All UK regular wine drinkers (n=1,000)

	Organic Wine	Fairtrade Wine	Biodynamic Wine	Sustainable Wine
Sample size n=	*1,000*	*1,000*	*1,000*	*1,000*
More ethically responsible	29%	48%	15%	39%
More environmentally-friendly	33%	21%	17%	43%
More expensive	37%	26%	23%	27%
It is less processed	25%	8%	13%	13%
Better for my health	21%	8%	12%	10%
Higher in quality	16%	11%	10%	10%
Tastes better	13%	11%	8%	9%
Better with food	9%	9%	7%	8%
More prestigious	12%	7%	6%	8%
Lower in calories	8%	5%	7%	5%
Lower in alcohol	6%	6%	6%	5%
Tastes worse	6%	4%	6%	5%
None of these	19%	19%	40%	20%

Green = Relative strength within each wine type
Red = Relative weakness within each wine type

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

ALTERNATIVE WINES ASSOCIATIONS

UK consumers deem organic wine as more expensive, higher quality, less processed and better for one's health compared with other alternative wine types

Alternative wine associations

% who associate alternative wine with the following statements
Base = All UK regular wine drinkers (n=1,000)

	Organic Wine	Fairtrade Wine	Biodynamic Wine	Sustainable Wine
Sample size n=	*1,000*	*1,000*	*1,000*	*1,000*
More ethically responsible	29%	48%	15%	39%
More environmentally-friendly	33%	21%	17%	43%
More expensive	37%	26%	23%	27%
It is less processed	25%	8%	13%	13%
Better for my health	21%	8%	12%	10%
Higher in quality	16%	11%	10%	10%
Tastes better	13%	11%	8%	9%
Better with food	9%	9%	7%	8%
More prestigious	12%	7%	6%	8%
Lower in calories	8%	5%	7%	5%
Lower in alcohol	6%	6%	6%	5%
Tastes worse	6%	4%	6%	5%
None of these	19%	19%	40%	20%

Top 3 associations

Red / Orange Statistically significantly higher than 3 or more / 2 wine types at a 95% confidence level
Source: Wine Intelligence, Vinitrac® UK, October 2020 (n=1,000), UK regular wine drinkers

ORGANIC WINE ASSOCIATIONS

Organic wine has a stronger connection with health and quality amongst younger drinkers and the more highly involved

Organic wine associations: By gender and age

% who associate organic wine with the following statements
Base = All UK regular wine drinkers (n=1,000)

		Gender		Age			Wine Involvement		
	All UK regular wine drinkers	Male	Female	18-34	35-54	55+	Low	Medium	High
n=	*1,000*	*495*	*505*	*244*	*352*	*403*	*255*	*370*	*375*
More expensive	37%	38%	37%	28%	38%	42%	32%	40%	38%
More environmentally-friendly	33%	32%	34%	28%	37%	32%	26%	34%	37%
More ethically responsible	29%	28%	30%	35%	32%	23%	23%	29%	34%
It is less processed	25%	27%	23%	25%	26%	24%	18%	26%	29%
Better for my health	21%	21%	21%	30%	20%	16%	16%	18%	28%
Higher in quality	16%	17%	16%	26%	17%	10%	10%	15%	22%
Tastes better	13%	15%	11%	24%	11%	8%	6%	10%	21%
More prestigious	12%	13%	10%	22%	11%	6%	6%	8%	19%
Better with food	9%	11%	7%	15%	8%	5%	2%	9%	13%
Lower in calories	8%	10%	5%	16%	7%	3%	3%	7%	12%
Tastes worse	6%	8%	4%	9%	6%	4%	4%	4%	9%
Lower in alcohol	6%	8%	3%	9%	6%	3%	4%	6%	7%
None of these	19%	19%	19%	8%	17%	28%	31%	20%	10%

Red / Blue: Statistically significantly higher / lower than all UK regular wine drinkers at a 95% confidence level
Source: Wine Intelligence, Vinitrac® UK, October 2020 (n=1,000), UK regular wine drinkers

FAIRTRADE WINE ASSOCIATIONS

Again, younger drinkers are more likely to regard Fairtrade wine as being better tasting and higher quality, though in both cases these are minority views

Fairtrade wine associations: By gender and age

% who associate Fairtrade wine with the following statements
Base = All UK regular wine drinkers (n=1,000)

		Gender		Age			Wine Involvement		
	All UK regular wine drinkers	Male	Female	18-34	35-54	55+	Low	Medium	High
n=	*1,000*	*495*	*505*	*244*	*352*	*403*	*255*	*370*	*375*
More ethically responsible	48%	44%	52%	46%	49%	49%	46%	51%	46%
More expensive	26%	26%	25%	24%	28%	24%	26%	25%	26%
More environmentally-friendly	21%	23%	20%	23%	22%	20%	14%	23%	25%
Tastes better	11%	15%	6%	20%	9%	7%	4%	8%	18%
Higher in quality	11%	13%	9%	18%	11%	6%	2%	11%	17%
Better with food	9%	12%	6%	13%	10%	6%	4%	6%	15%
Better for my health	8%	12%	5%	15%	9%	3%	4%	5%	15%
It is less processed	8%	11%	5%	15%	7%	5%	4%	7%	12%
More prestigious	7%	8%	6%	10%	8%	4%	4%	6%	10%
Lower in alcohol	6%	8%	3%	11%	5%	3%	2%	5%	8%
Lower in calories	5%	9%	2%	11%	5%	3%	4%	5%	7%
Tastes worse	4%	6%	2%	11%	3%	1%	5%	3%	5%
None of these	19%	19%	19%	8%	17%	27%	30%	20%	11%

Red / Blue: Statistically significantly higher / lower than all UK regular wine drinkers at a 95% confidence level
Source: Wine Intelligence, Vinitrac® UK, October 2020 (n=1,000), UK regular wine drinkers

SUSTAINABLE WINE ASSOCIATIONS

Age and gender differences emerge amongst some of the less widely shared associations for sustainable wine, such as 'better for my health' and 'less processed', which are again more associated with younger and more highly involved wine drinkers

Sustainable wine associations: By gender and age

% who associate sustainable wine with the following statements
Base = All UK regular wine drinkers (n=1,000)

		Gender		Age			Wine Involvement		
	All UK regular wine drinkers	Male	Female	18-34	35-54	55+	Low	Medium	High
n=	*1,000*	*495*	*505*	*244*	*352*	*403*	*255*	*370*	*375*
More environmentally-friendly	43%	37%	48%	40%	48%	40%	39%	43%	45%
More ethically responsible	39%	37%	42%	37%	43%	37%	34%	38%	44%
More expensive	27%	28%	26%	25%	29%	27%	24%	30%	27%
It is less processed	13%	14%	12%	22%	11%	10%	8%	12%	18%
Better for my health	10%	11%	9%	19%	9%	6%	5%	8%	15%
Higher in quality	10%	13%	7%	17%	11%	5%	2%	8%	17%
Tastes better	9%	12%	6%	18%	10%	3%	3%	8%	15%
Better with food	8%	13%	4%	15%	9%	4%	3%	6%	14%
More prestigious	8%	10%	5%	15%	7%	4%	5%	5%	12%
Lower in calories	5%	9%	2%	9%	7%	3%	2%	4%	9%
Lower in alcohol	5%	8%	3%	11%	4%	3%	4%	4%	7%
Tastes worse	5%	7%	3%	9%	5%	3%	3%	4%	7%
None of these	20%	19%	21%	8%	17%	30%	28%	22%	12%

Red / Blue: Statistically significantly higher / lower than all UK regular wine drinkers at a 95% confidence level
Source: Wine Intelligence, Vinitrac® UK, October 2020 (n=1,000), UK regular wine drinkers

BIODYNAMIC WINE ASSOCIATIONS

Biodynamic wines do not have any overly strong associations, other than being perceived as broadly more expensive, environmentally friendly and ethically responsible; once again, under 35s and the more involved are more likely to buy into these associations

Biodynamic wine associations: By gender and age

% who associate biodynamic wine with the following statements
Base = All UK regular wine drinkers (n=1,000)

		Gender		Age			Wine Involvement		
	All UK regular wine drinkers	Male	Female	18-34	35-54	55+	Low	Medium	High
n=	*1,000*	*495*	*505*	*244*	*352*	*403*	*255*	*370*	*375*
More expensive	23%	25%	21%	21%	23%	24%	20%	25%	23%
More environmentally-friendly	17%	19%	15%	22%	20%	12%	8%	18%	23%
More ethically responsible	15%	18%	13%	24%	15%	11%	8%	15%	21%
It is less processed	13%	13%	12%	14%	14%	10%	8%	13%	15%
Better for my health	12%	13%	11%	21%	12%	7%	8%	11%	17%
Higher in quality	10%	13%	7%	19%	10%	4%	3%	9%	14%
Tastes better	8%	12%	4%	19%	7%	1%	3%	6%	12%
Better with food	7%	10%	4%	14%	7%	2%	3%	5%	12%
Lower in calories	7%	9%	4%	12%	5%	4%	5%	5%	9%
Lower in alcohol	6%	9%	4%	12%	5%	4%	4%	5%	9%
Tastes worse	6%	8%	5%	11%	5%	4%	6%	5%	8%
More prestigious	6%	7%	5%	10%	6%	3%	2%	5%	10%
None of these	40%	34%	45%	21%	38%	53%	54%	43%	27%

Red / Blue: Statistically significantly higher / lower than all UK regular wine drinkers at a 95% confidence level
Source: Wine Intelligence, Vinitrac® UK, October 2020 (n=1,000), UK regular wine drinkers

CONTENTS

06 SOLA Global management summary

11 SOLA UK management summary

17 Attitudes towards sustainability
- General attitudes towards sustainability
- Attitudes towards sustainability in wine

21 SOLA Wine Opportunity Index
- UK Alternative Wine Opportunity Index 2021
- UK Alternative Wine Opportunity Index: Tracking
- Alternative wines awareness, sought to purchase, consideration and affinity

30 Net purchase intent of wine types
- Net intent to purchase
- Net Intent to purchase: Tracking

35 Alternative wines associations
- Alternative wine associations: Imagery map
- Alternative wine associations
- Organic, Fairtrade, sustainable and biodynamic associations

43 Methodology
- SOLA opportunity report markets
- Quantitative

METHODOLOGY: SOLA OPPORTUNITY REPORT MARKETS

The data collected in each market is representative of wine drinkers in that market

2018 report	2019 report	2021 report
12,000 consumers	16,000 consumers	17,000 consumers
✓ Australia ✓ Canada ✓ Finland ✓ Germany ✓ Ireland ✓ Japan ✓ New Zealand ✓ Portugal ✓ Sweden ✓ UK ✓ US	✓ Australia ✓ Belgium ✓ Belgium ✓ Canada ✓ Finland ✓ Germany ✓ Hong Kong ✓ Japan ✓ Netherlands ✓ New Zealand ✓ Portugal ✓ Spain ✓ Sweden ✓ UK ✓ US	✓ Australia ✓ Belgium ✓ Brazil ✓ Canada ✓ France ✓ Germany ✓ Ireland ✓ Japan ✓ Netherlands ✓ New Zealand ✓ Portugal ✓ South Korea ✓ Spain ✓ Sweden ✓ Switzerland ✓ UK ✓ US

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

Wine Intelligence Ltd Terms and Conditions of Licence for Syndicated Research Products – key sections

Definitions and Interpretation

The "Agreement" means the Agreement between Wine Intelligence Ltd and the Customer to provide a Licence for the use of the Syndicated Research Report(s) for Fees on these terms and conditions of business and as set out in a Proposal and the Acceptance of Proposal

"WI" is Wine Intelligence Ltd, trading as Wine Intelligence.

"Customer" means the person or entity purchasing the Licence for the use of the Syndicated Research Report(s)

"Proprietary Information" means all information contained in the Syndicated Research Report(s) and associated briefings or presentations by WI, plus all logos, Processes, third party data and formats contained therein

"Licence" means the Customer's right to use, store, retrieve and disseminate the Syndicated Research Report(s), as defined by the Agreement

"Acceptance of Proposal" means the document provided by the Customer to WI confirming the terms of engagement of WI to provide the Customer with the Licence for the use of the Syndicated Research Report(s)

"Fees" means the fees payable by the Customer to WI, as set out in the Contract, plus VAT at the current rate, subject to exemptions as set out in UK and EU law

"Processes" means any research processes, techniques and methodologies used in the creation of the Syndicated Research Report(s)

"Proposal" means the specification of the Syndicated Research Report(s) by WI to the Customer

"Syndicated Research Report" means a written document containing Wine Intelligence copyright materials such as data, information, insight, commentary, either written, oral, video, or audio and, where appropriate, copyright materials of a Third Party that have been reproduced by permission

"Representative Organisation" means any body, association, trading group, generic organisation or any other coalition of interested parties, howsoever constituted, that acts on behalf of a broader group of stakeholders

"Subscription Products" means Syndicated Research Reports delivered to the Customer periodically as part of an ongoing Agreement

1. Engagement

The Customer engages WI to provide the Syndicated Research Report(s), and WI agrees to do so upon the terms of the Agreement for payment of the Fees.

The Fees for the Syndicated Research Reports shall be priced in Pounds Sterling. WI will publish indicative prices in Euros, [XX] Dollars, Australian Dollars, Canadian Dollars from time to time, and the Customer will have the opportunity to pay for Syndicated Research Reports using these currencies. Should the Customer opt for this form of payment the exact amount payable will be based on the prevailing exchange rate at the time of the execution of the Agreement.

2.. **Copyright**

2.1 The Copyright in the Syndicated Research Report(s) shall at all times vest with WI. The copyright in all artwork, data and copy for each element of the report created and assembled by WI shall at all times remain the property of WI.

2.2 All copyright and any other intellectual property rights in any material produced supplied or made available by a third party to WI for inclusion in the Syndicated Research Report shall remain the property of the third party. The Customer warrants its title to WI, except as may be expressly disclosed in writing, and agrees to indemnify WI against any claims by third parties in respect of any infringement of their copyright or other intellectual property rights.

2.3 WI asserts to the Customer its moral right to be identified as the author of the Syndicated Research Report in accordance with the UK Copyright Designs and Patents Act 1988 Section 77 and 78, and shall be entitled to hold itself out as the author of the Syndicated Research Report (and in particular the research undertaken in the process of completing the Syndicated Research Report) as part of WI's own general marketing activities. WI shall be entitled to publish the name of the Customer in association with the Syndicated Research Report(s) as part of this general marketing activities.

2.4 The copyright in the Processes used to execute the Syndicated Research Report shall remain the property of WI throughout.

3. Licence

3.1 WI grants to the Customer under the Agreement a non-exclusive Licence in perpetuity to store and retrieve an electronic version of the Syndicated Research Report(s)

3.2 The Customer is entitled to disseminate the Syndicated Research Report(s) within its immediate organisation, including organisations affiliated by majority shareholdings, legally liable partnerships, or other majority ownership structure

3.3 If the Customer is a Representative Organisation, the entitlement outlined in Clause 7.2 DOES NOT extend to parties who hold membership or similar interest in the Representative Organisation, except by specific written permission from WI and the payment of further Fees associated with a Multi-User Licence

3.4 The Customer is entitled to extract elements of the Syndicated Research Report and re-use them for internal and external presentations, subject to the doctrine of Fair Use

3.5 At all times the Customer must identify any information extracted from the Syndicated Research Report in 7.5 above as being from WI

4. Warranties

No advice or information whether oral or written provided by WI to the Customer through the Syndicated Research Report(s) shall create any warranty not expressly stated in this Agreement.

The Client warrants and undertakes to abide by the UK Copyright Designs and Patents Act 1988 Section 77 & 78, and undertakes to obey the copyright restrictions on any materials received as part of this Agreement.

Please contact Wine Intelligence for full terms and conditions

Connecting wine businesses with knowledge and insights globally

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