



Wine Closures - Research Update 2013

Is Cork Experiencing a Renaissance?

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Created for: Wine Vision, London, November 2013

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Wine Closures Research Overview

Large consumer base over multiple years

Over 3000 consumers around the world

- Males (~35%) and Females (~65%)
 - Head of household, primary shoppers, ages 25-65
 - Red and white wine purchasers drinkers
 - 80% drink wine at least once a week
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- **2004** -- 300 consumers, USA
 - **2007** -- 950 consumers, USA, France, UK, and Australia
 - **2011** -- 350 consumers, USA
 - **2013** -- 1550 consumers, USA, Australia, and Germany

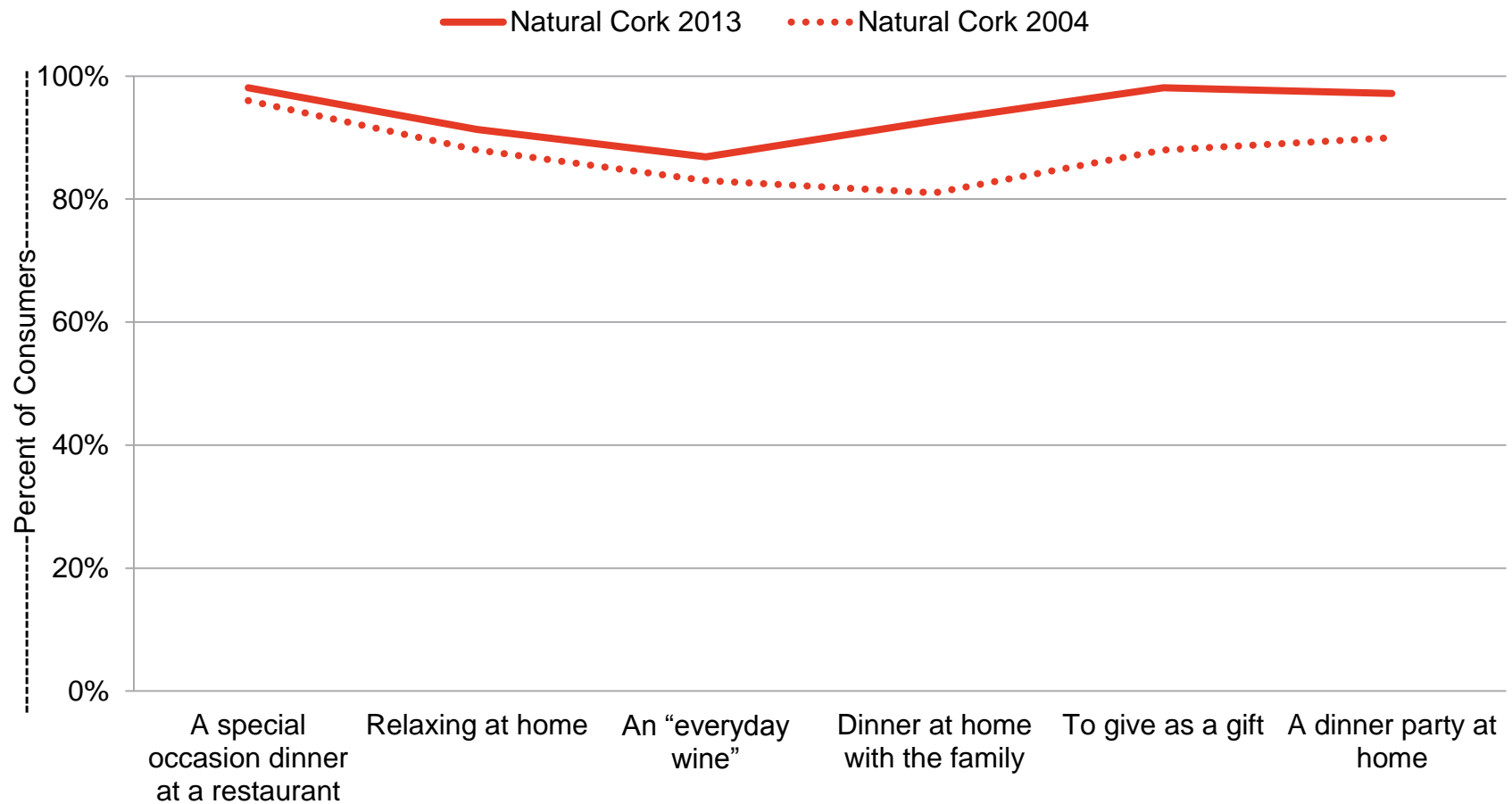
Consumers completed two web-based questionnaires.

- Usage, perceived quality, and purchase interest
- Conjoint for price, closure, country of origin, and wine type

Closures – Then and Now - USA

Appropriateness by usage occasion

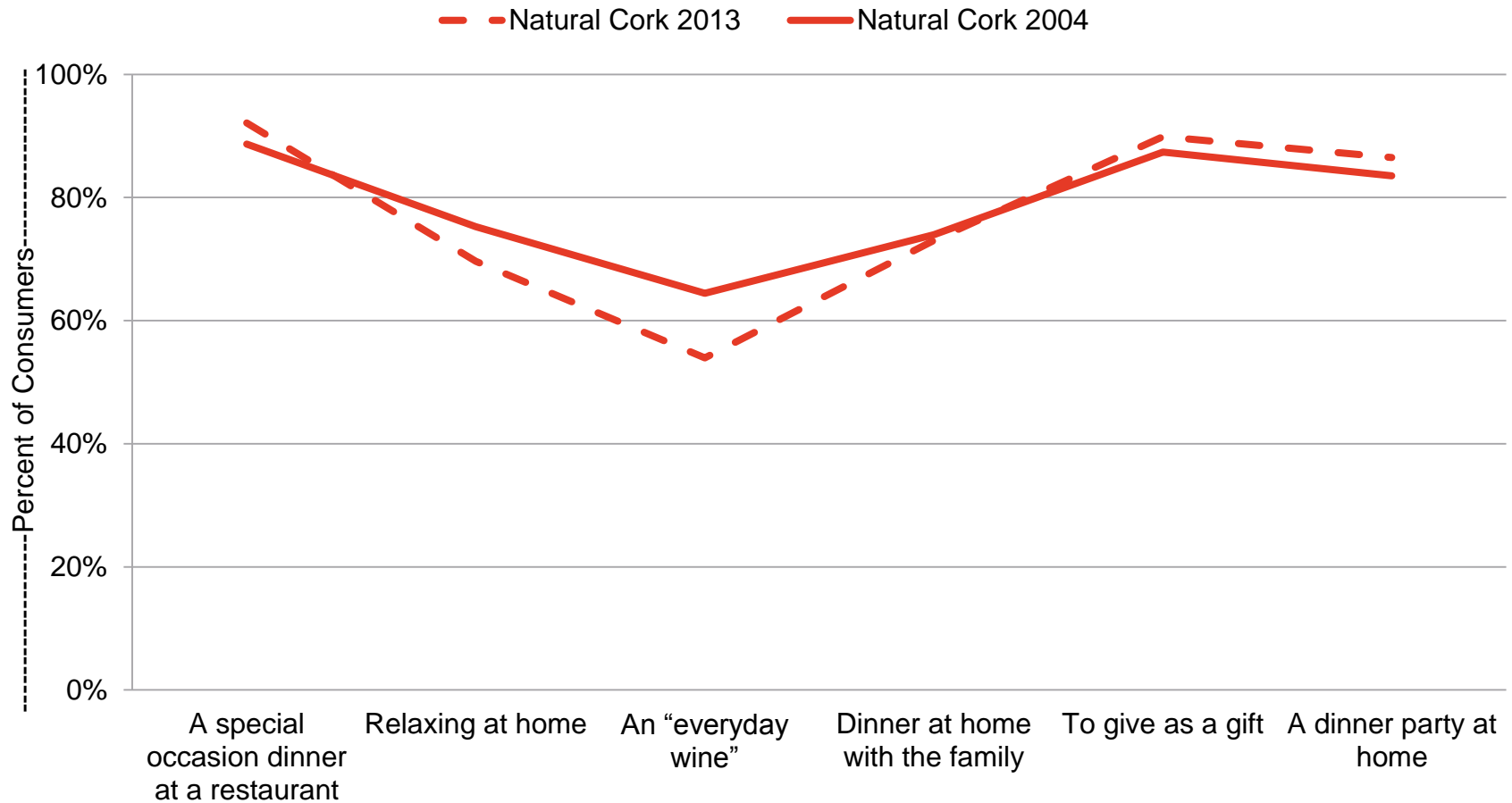
In the USA, perception of Natural Cork has changed little over the past 10 years. It is still appropriate for all usage occasions.



Closures – Then and Now - Australia

Appropriateness by usage occasion

In Australia, perception of Natural Cork has also changed little over the past 10 years.



Closures – Then and Now - USA

Appropriateness by usage occasion

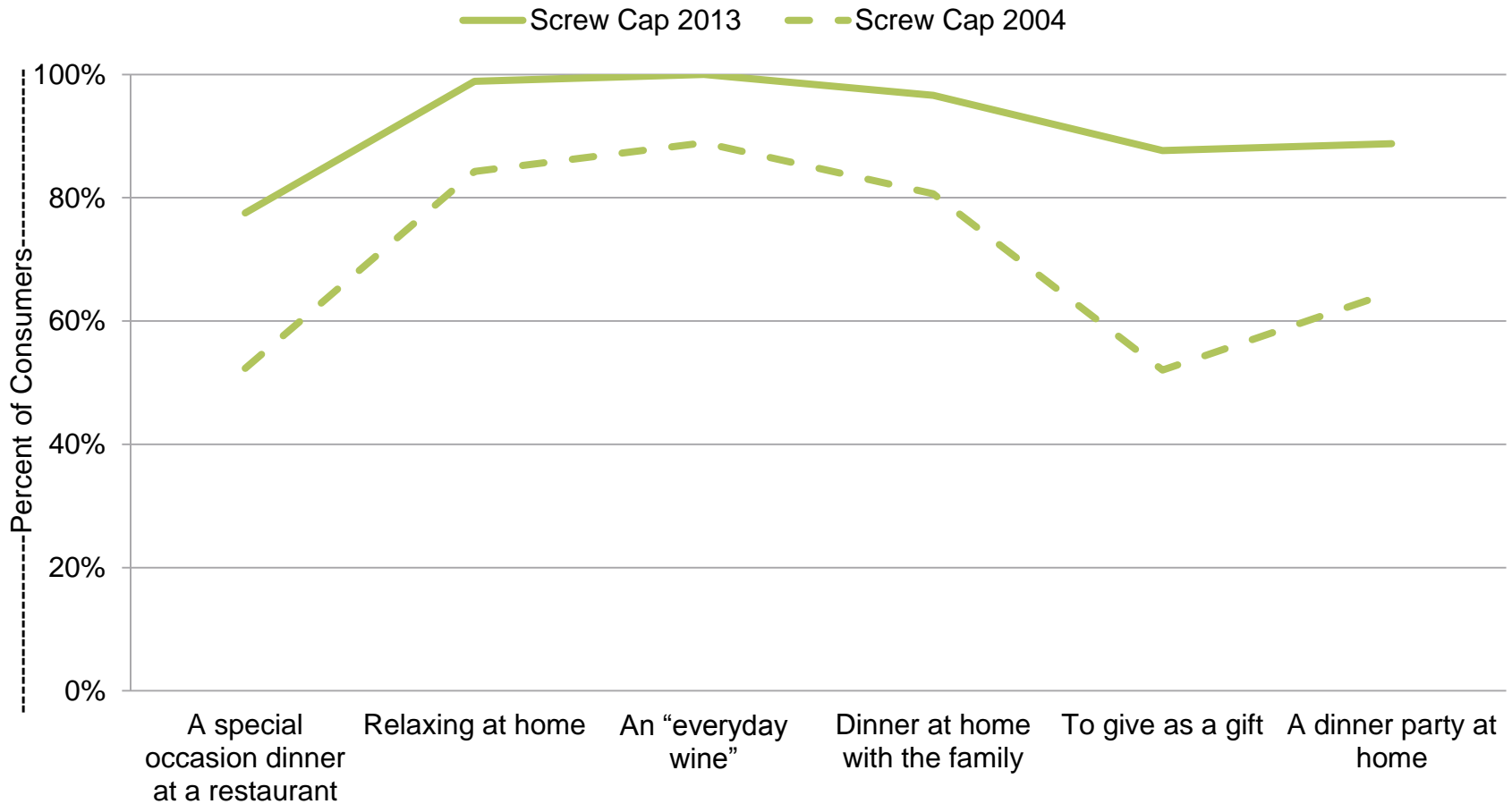
In the USA, perception of Screw Caps has changed substantially over the past 10 years; however, it is still most appropriate for casual occasions.



Closures – Then and Now - Australia

Appropriateness by usage occasion

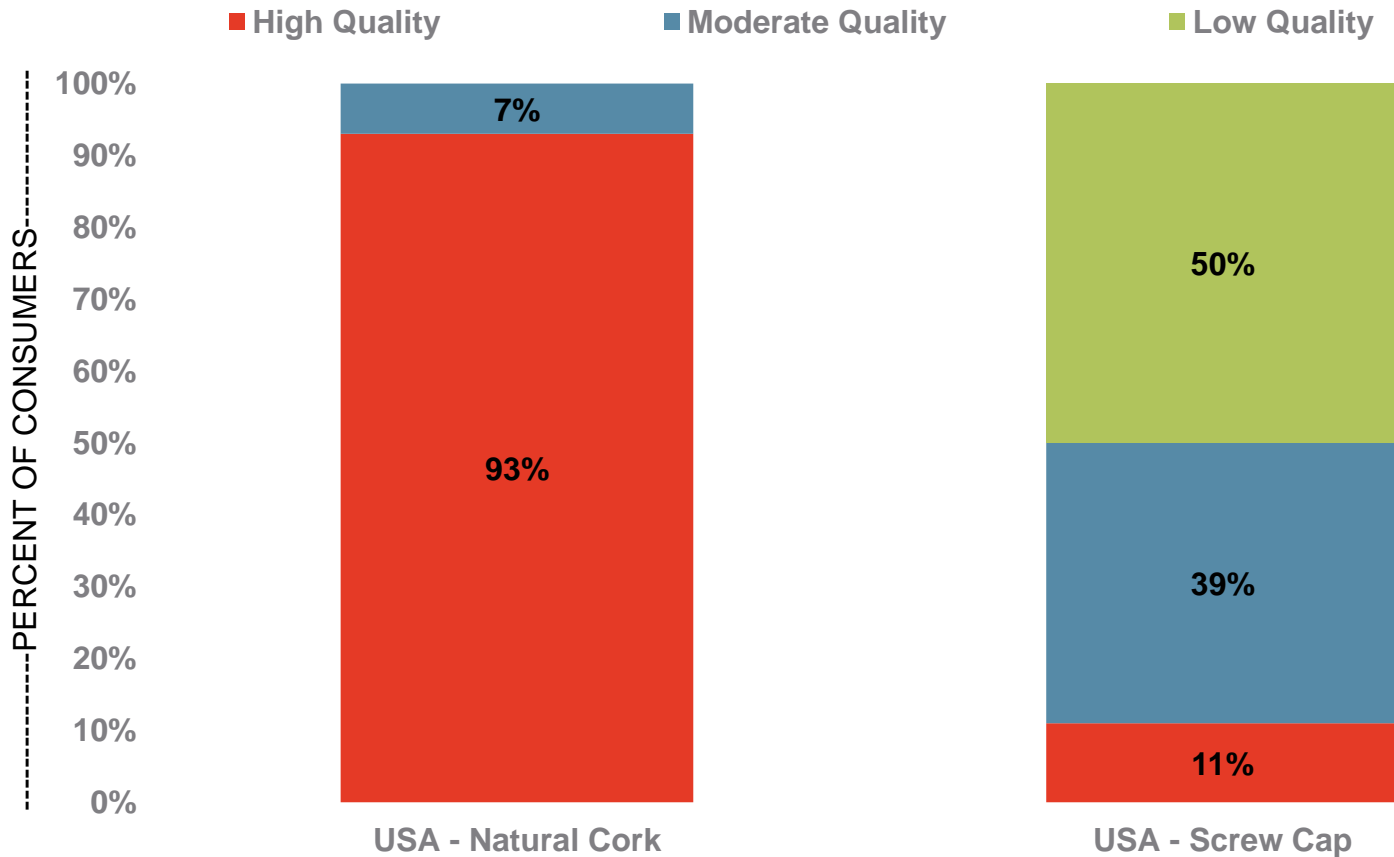
In Australia, perception of Screw Caps has changed. It remains most appropriate for casual occasions and less appropriate for special occasions.



Closure Research – 2011 USA

What does this wine closure convey about wine quality?

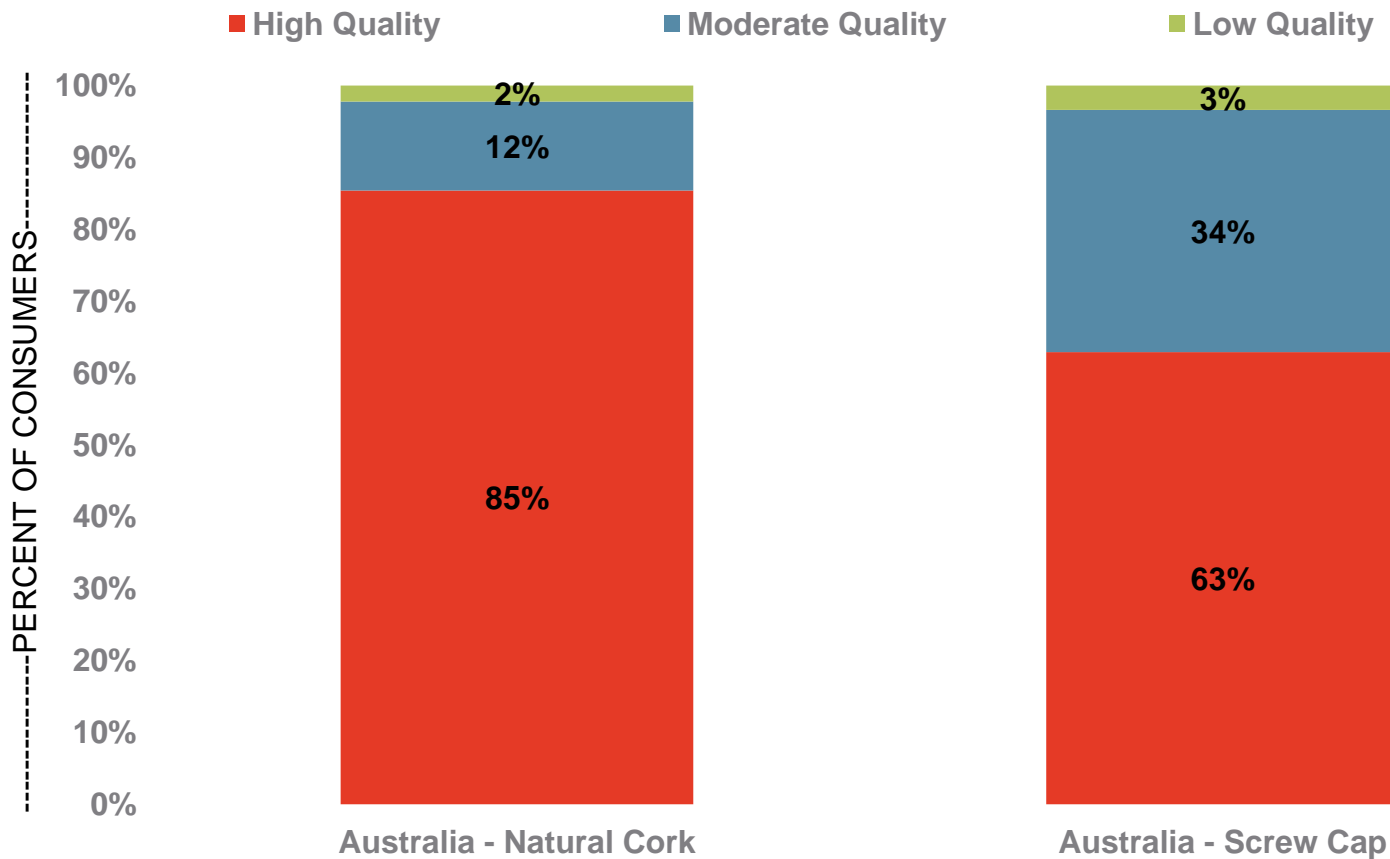
In the USA, Natural Cork conveys high quality whereas Screw Cap conveys low quality.



Closure Research – 2013 Australia

What does this wine closure convey about wine quality?

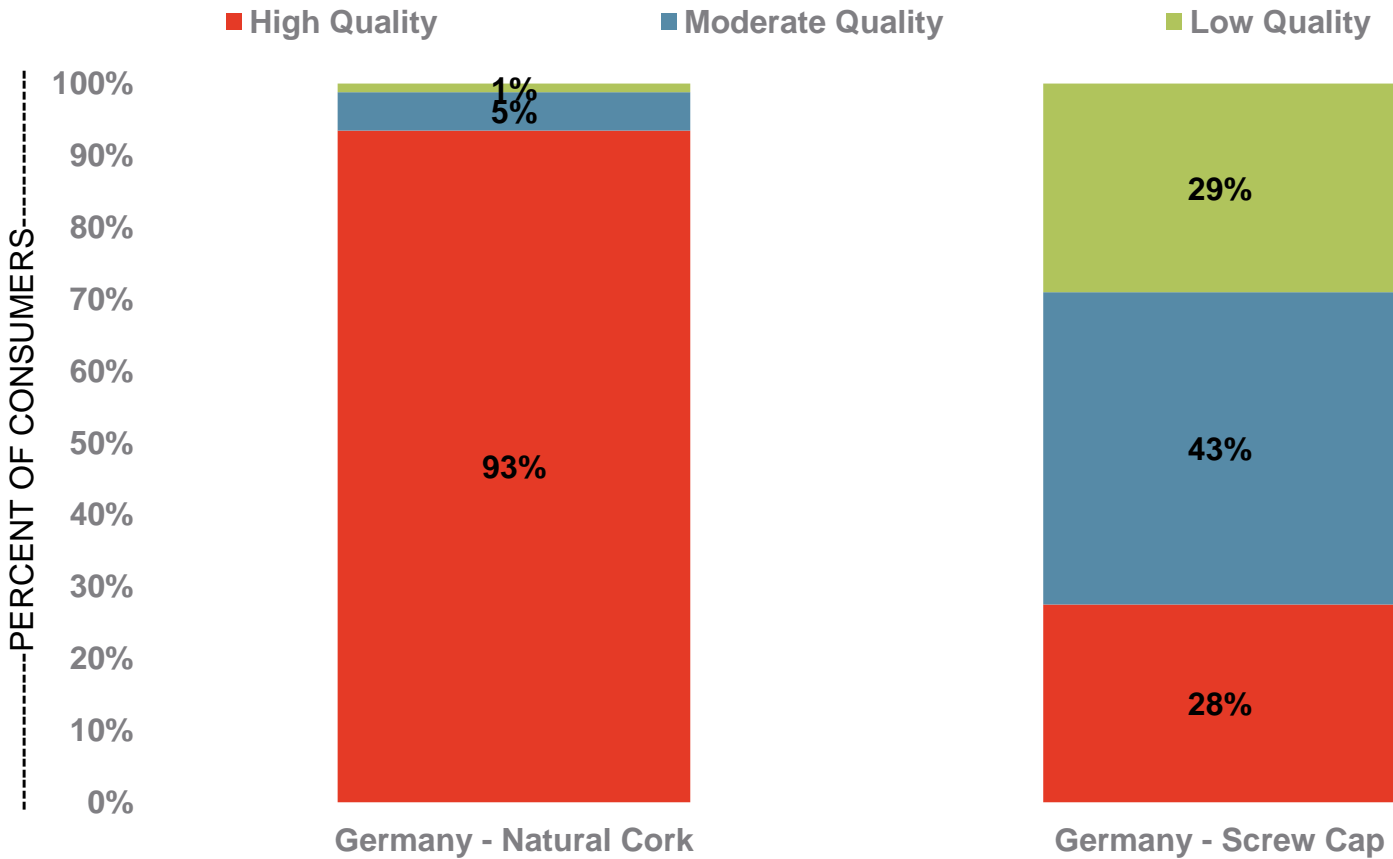
In Australia, Natural Cork conveys high quality whereas Screw Cap conveys more moderate quality.



Packaging Research – 2013 Germany

What does this wine closure convey about wine quality?

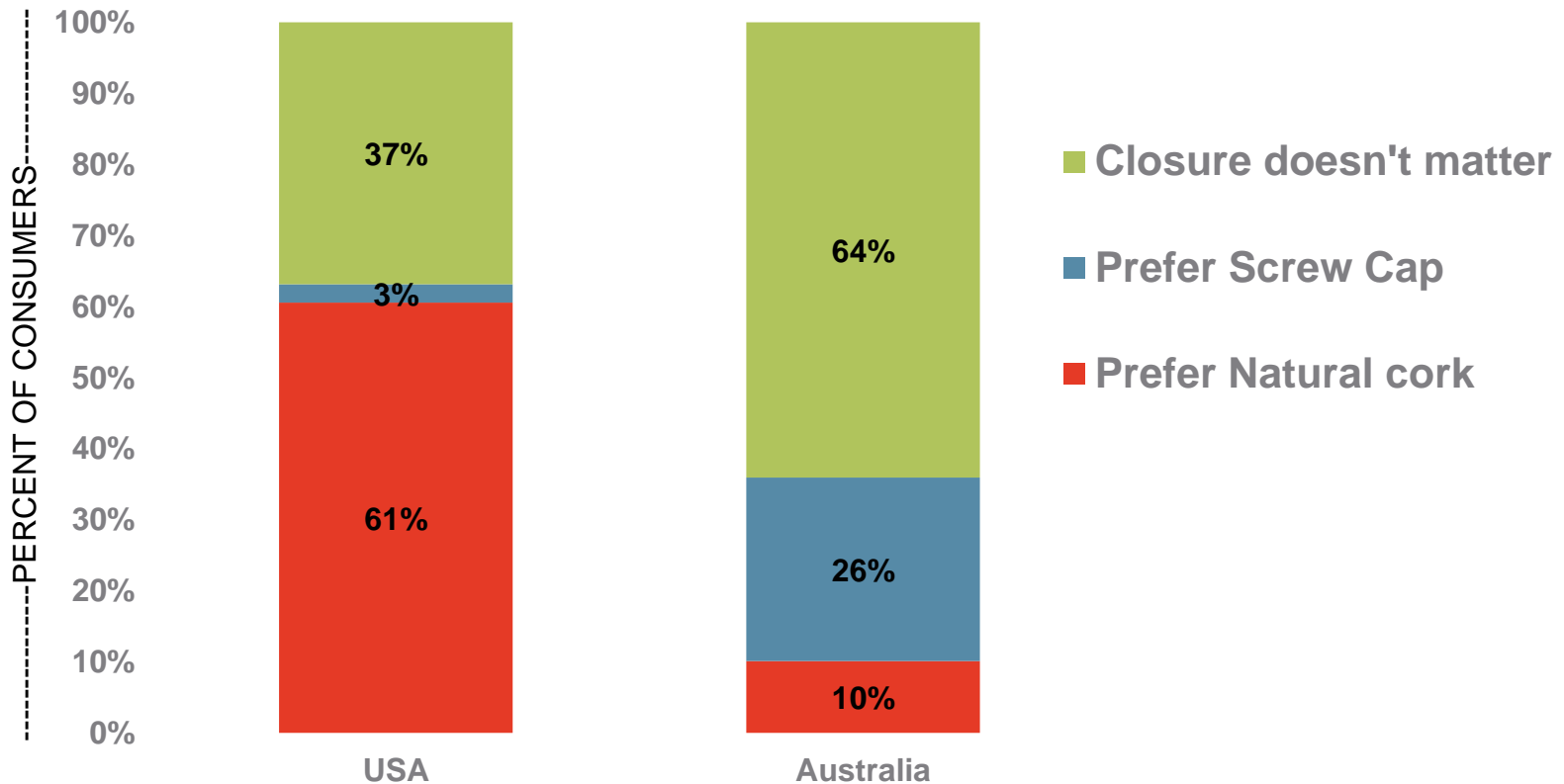
In Germany, Natural Cork conveys high quality; Screw Cap conveys moderate to low quality.



Closure Preference on Purchase Interest

In the USA, consumers prefer to purchase wines with Natural Cork.

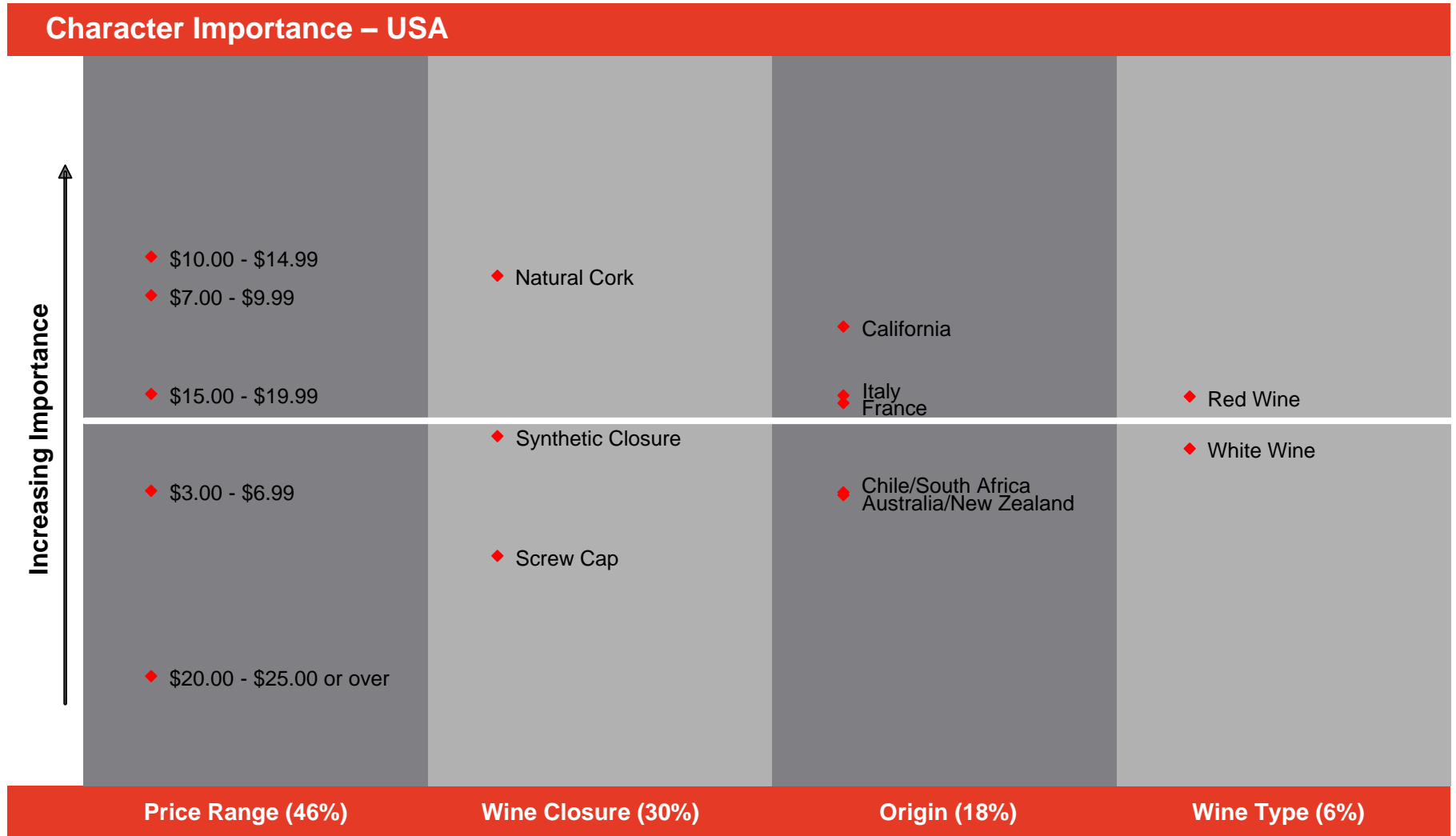
In Australia, closure type has less impact on purchase interest.



Conjoint Analysis Results - 2013

Character Importance – USA

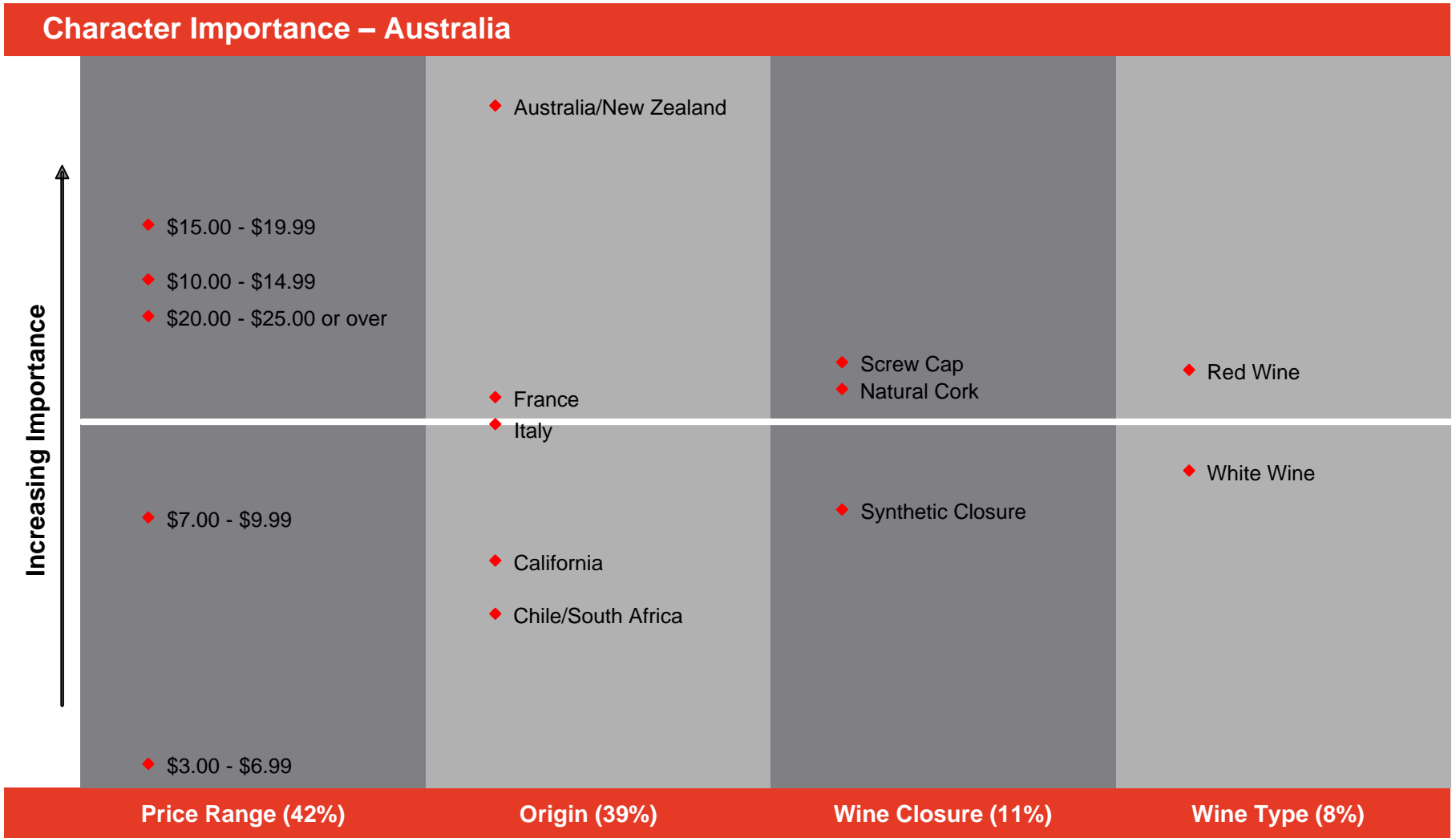
In the USA, price is most important, followed by closure type. Natural Cork is a positive influence on purchase interest whereas Screw Cap is a negative influence.



Conjoint Analysis Results - 2013

Character Importance – Australia

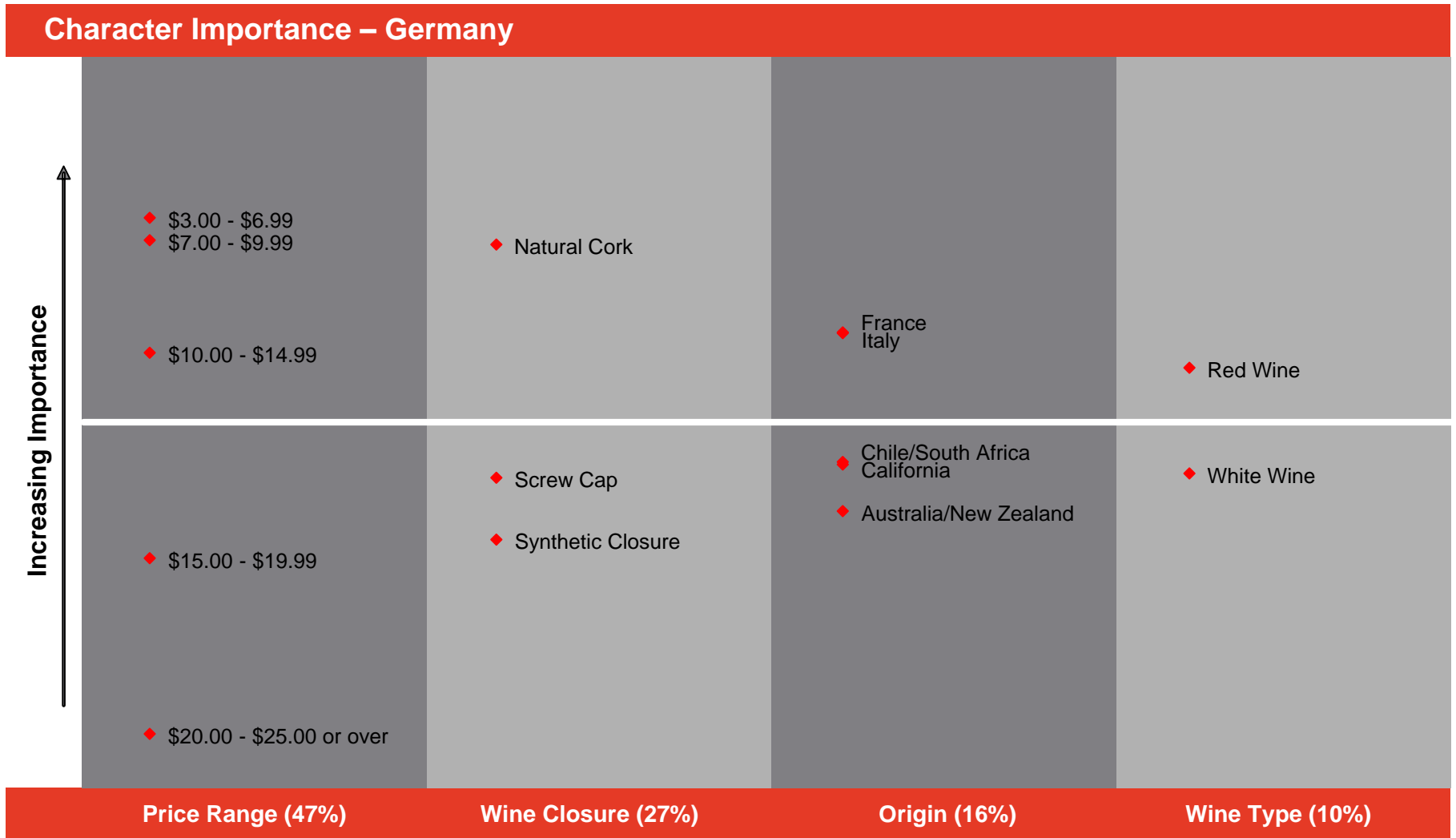
In Australia, price is slightly more important than country of origin. Closure has less influence. Natural Cork and Screw Cap were positive influences whereas Synthetic has a negative influence.



Conjoint Analysis Results - 2013

Character Importance – Germany

In Germany, price is most important to purchase, followed by closure. Natural Cork is a positive influence on purchase interest whereas Screw Cap and Synthetic closures are negative influences.



What is your Business Objective?

Be educated by your consumer.

Closures influence consumer perception of wine quality and purchase interest.

USA and Germany are more similar in perceptions of wine closures. However, even Australia rates perceived quality of Natural Cork higher than Screw Cap.

There is no “*one size fits all*” approach.

Business objectives should dictate the type of closure most appropriate for the country, brand, wine style, price point, and target consumer.

Thank you to our global research partners, without whom this research would not have been possible.



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