# Wine Australia Cider Survey: UK

IWSR
drinks market analysis


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# Executive Summary: UK


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# Executive Summary

- The UK cider target audience appears predominantly **white**, **urban or suburban**, geared towards **professional/managerial** and fairly **spread out over the various age groups**

- **Females** appear a particular target audience for brands that are **heavily geared towards fruit flavours**, whereas **males** appear more amenable towards traditional **apple ciders**.

- Consumers of **all age groups** appear relatively internet-savvy with differences only apparent in terms of streaming and app usage, but not in terms of browsing, ecommerce or social media usage. There is however some differential on what social media platforms are used – while Facebook is almost universal, Instagram, Pinterest and Snapchat are more geared towards younger internet users among the cider drinker sample in this survey.

- **Craft cider consumption** is a significant claim among respondents. **Variety** and **trial** are important when drinks are being chosen, domestic nationalism does not seem to play a role and the term 'craft' appears to have positive connotations, with taste, quality and diversity the leading themes when considering 'craft'.


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# Executive Summary

- An identification of **provenance** appears important – whether real or perceived. This is important not only for craft drinks, but even for mainstream brands.

- Both **home and pub/bar consumption** score highly for both mainstream and craft ciders. A difference in them appears when considering high-energy occasions such as nightclubs – these are more important for mainstream ciders, while **craft ciders** have some strength in consumption at the **place where they are actually made**.

- **Taste and refreshment** are the forefront of why ciders are chosen. Importantly, any associations with health do not appear to be of importance, although allusions to the input fruit and its freshness definitely do.

- **Summer consumption** (Jun-Aug) remains at the forefront for cider, but consumption claims in winter – the lowest season – are not materially different. While there is seasonality this is not particularly extreme.

- **Familiarity and brand loyalty** outweighs **novelty** in choosing a cider brand – but only just, and both in on- as well as off-premise. Price considerations and active promotions weigh heavier in off-premise.


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# Executive Summary

- While **traditional apple flavour** is preferred overall, **fruit-flavoured ciders** have significant clout, especially among female UK cider drinkers.

- UK cider drinkers in this survey are **more aware of a large number of brands than they are active drinkers of**. There appears to be a ubiquity of brands they have come across, but trial rates remain below recognition rates.

- Australia as a concept rates highly among the UK cider drinker survey in both prompted and unprompted word association exercises, but **food, drink and fruit – certainly apple -** does not score particularly highly. More general associations are made with wildlife and tourism concepts.

- UK cider drinkers surveyed had good awareness of only a few Australian brands tested. By far the leading one of them is **Fosters**, but reassuringly the Top 5 also included **Yellowtail** and **Penfolds** wine brands. Despite the apparent pre-eminence of Fosters, Australian **wine** is at the forefront of consumption claims among beverage alcohol from Australia.

- UK cider drinkers surveyed overwhelmingly claim **they would, indeed, try Australian craft ciders**, but mostly with a **vague notion of wanting to try something different**. Among the few rejectors who would not try the main drawback appears to be that there is **no perceived connection between Australia and the notion of cider**. The trustmark, nevertheless, may help with half of respondents reacting positively.


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# Context: UK



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# Methodology

Nationally representative quotas were set for **age and gender (within each age range).**

| Age & Gender | Males | Females |
|---|---|---|
| 18-34 | 64 | 69 |
| 35-44 | 55 | 61 |
| 45-54 | 52 | 53 |
| 55-64 | 50 | 56 |
| 65-70 | 24 | 16 |

Respondents were screened based on whether or not they drink **'craft or mainstream ciders**' at least every 2-3 months.

Which of these types of drinks do you drink at least every 2 to 3 months?
(multiple choice)

→

- Carbonated soft drinks
- Bottled water
- **Craft and/or mainstream ciders**
- Beers, lagers, and ales
- Spirits
- Wine
- Fresh juices
- None of these

→

Screened out unless selected



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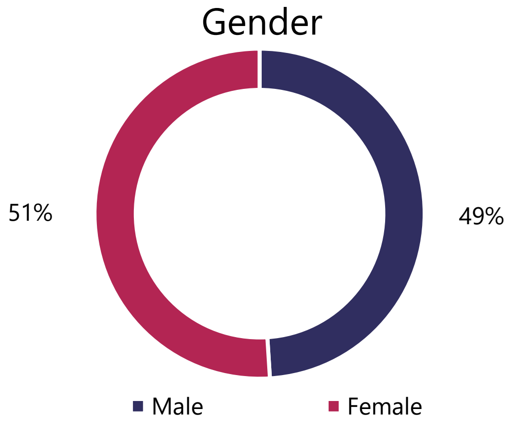
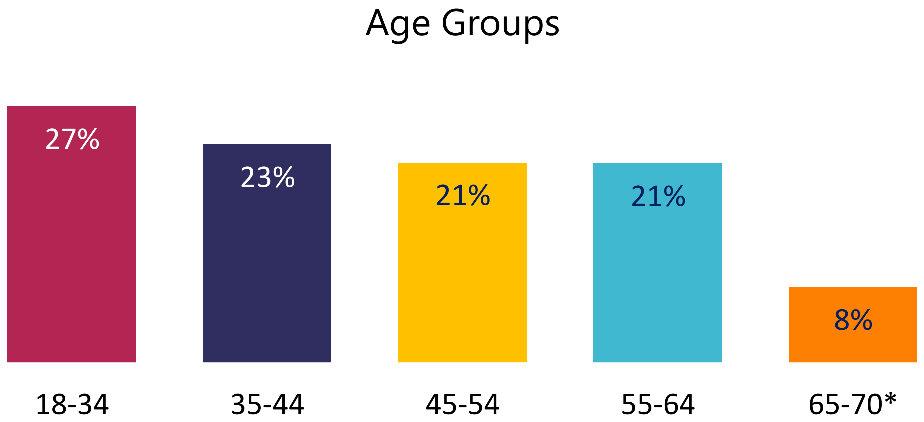
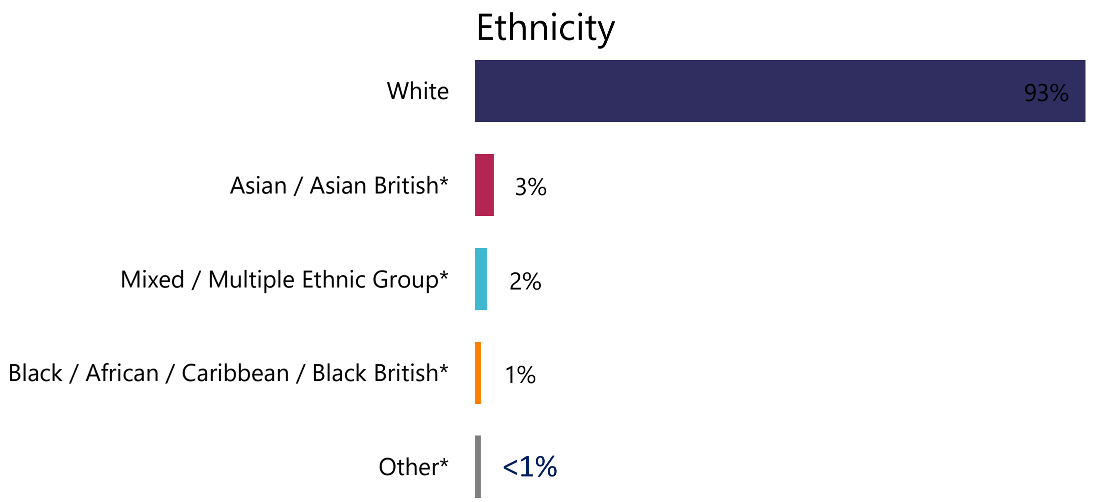
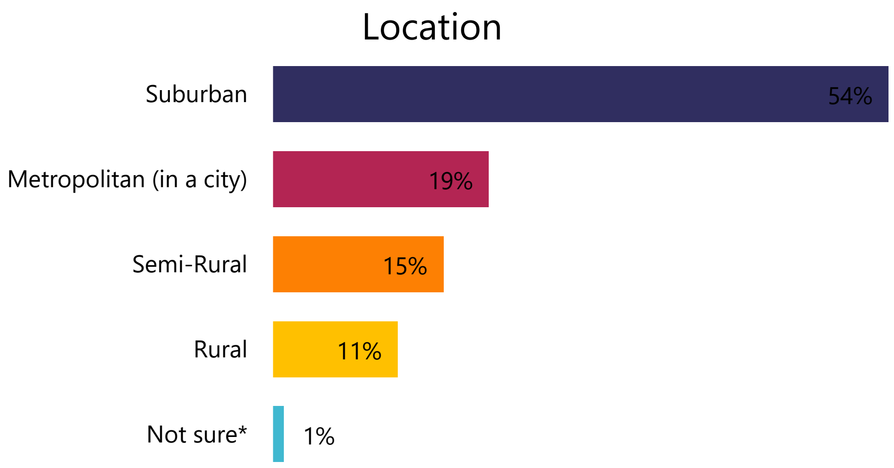
# The survey was held among a group of respondents broadly representative of the national population in terms of gender and age. Cider drinkers in the UK appear predominantly white and mostly urban or suburban.




Q1-3 & Q5. "Demographics"
Base size: All respondents (n=500)
* Low base size



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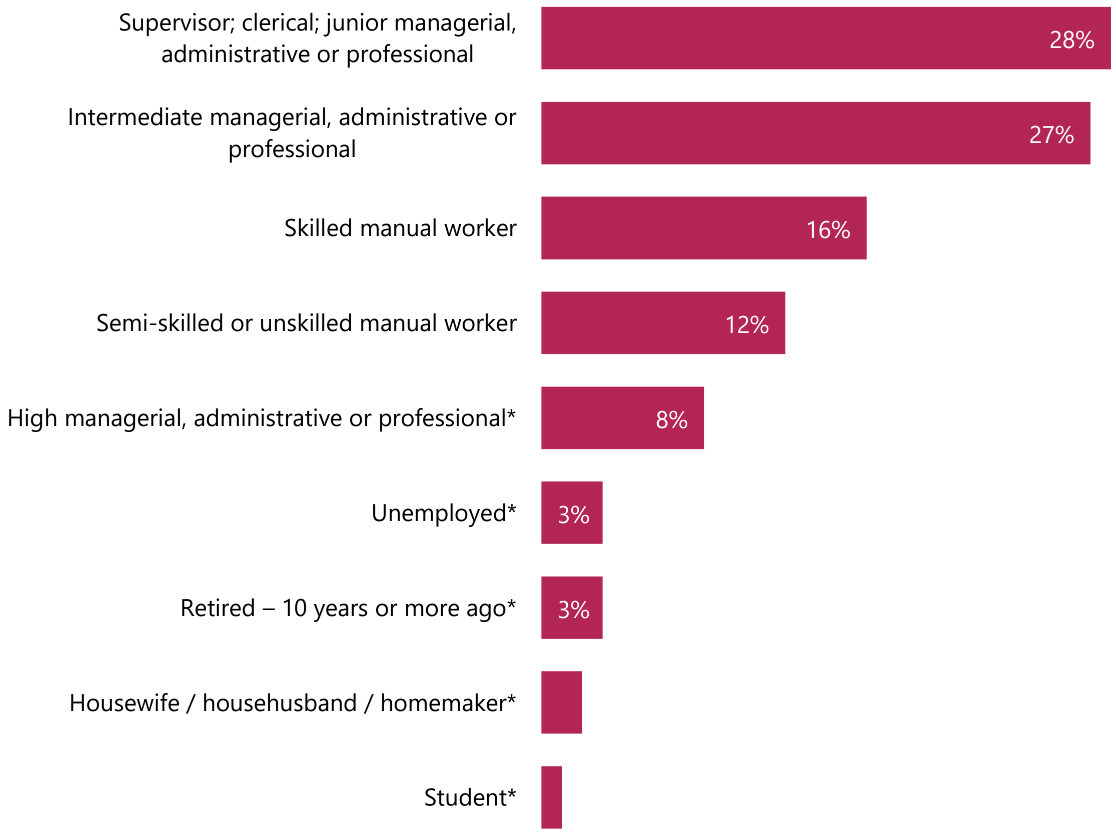
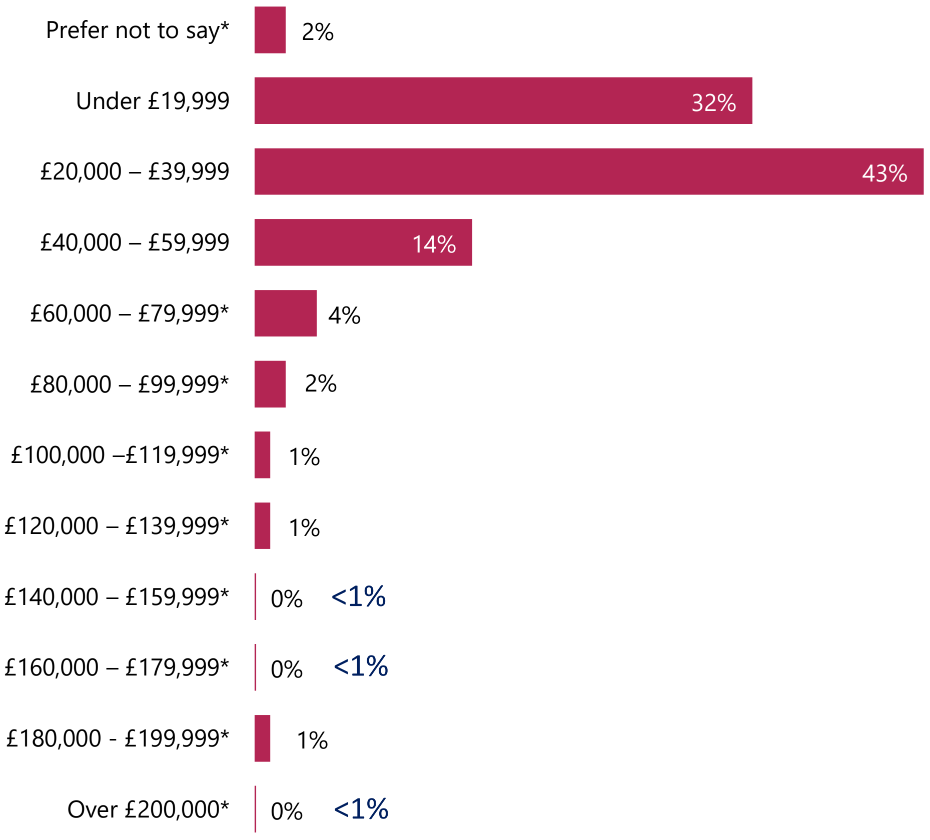
# UK cider drinkers in this survey are predominantly in junior management or administration roles, mostly with either starter or second/third job income levels.

## Occupation Of Main Household Income Earner




## Annual Income




Q4 & Q6. "Employment & Earnings"
Base size: All respondents (n=500)
* Low base size



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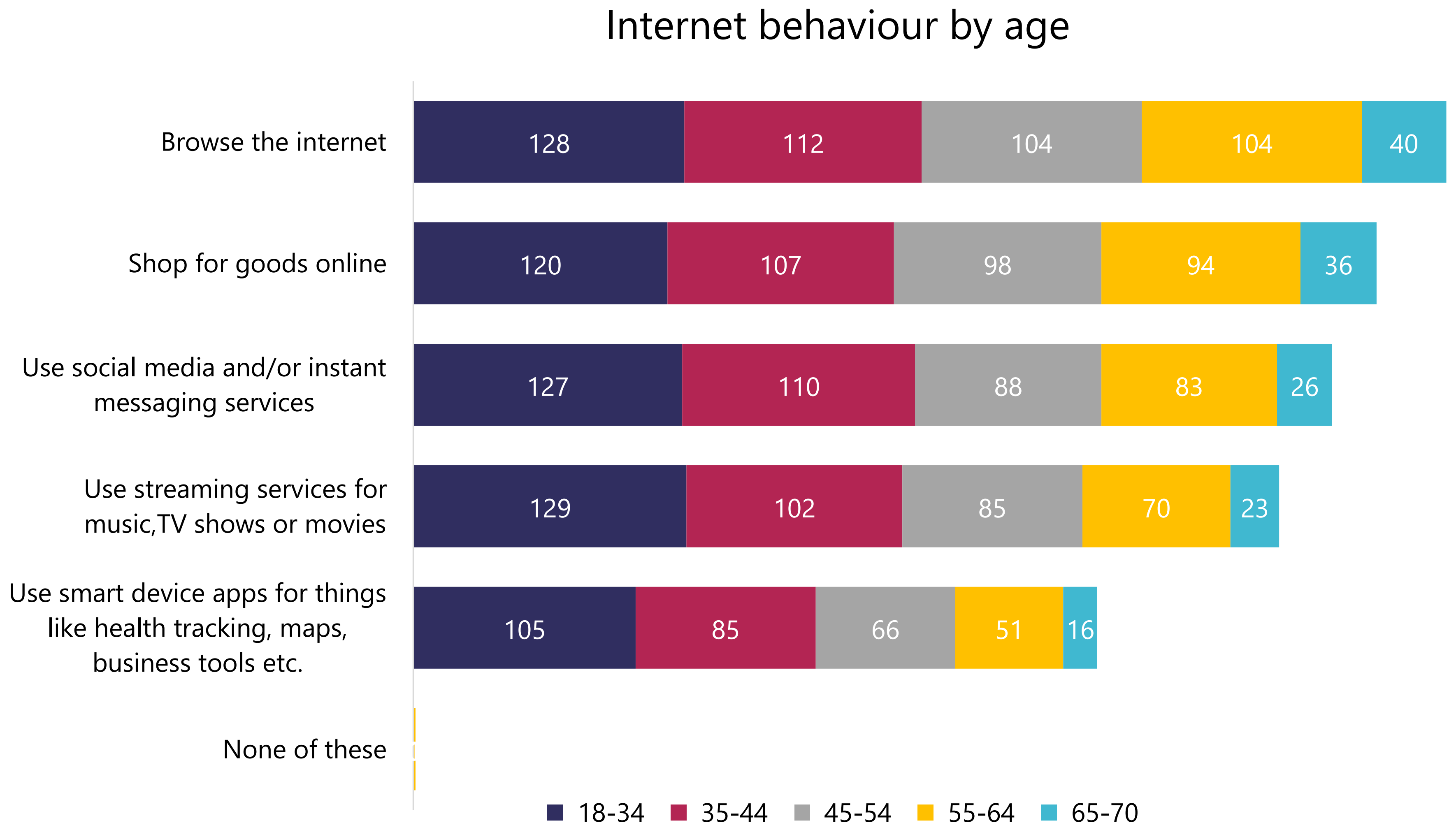
There is **relatively little difference in internet behaviour** between the ages apart from the oldest cohort. The youngest cohort is ahead consistently of other age groups but not significantly so in terms of browsing, using ecommerce or using social media. Streaming services and the usage of apps is, however, slightly reduced among older UK cider drinkers.




Q8. "Which of these things do you do once a month or more often?" (multiple response)
Base size: All respondents (n=500)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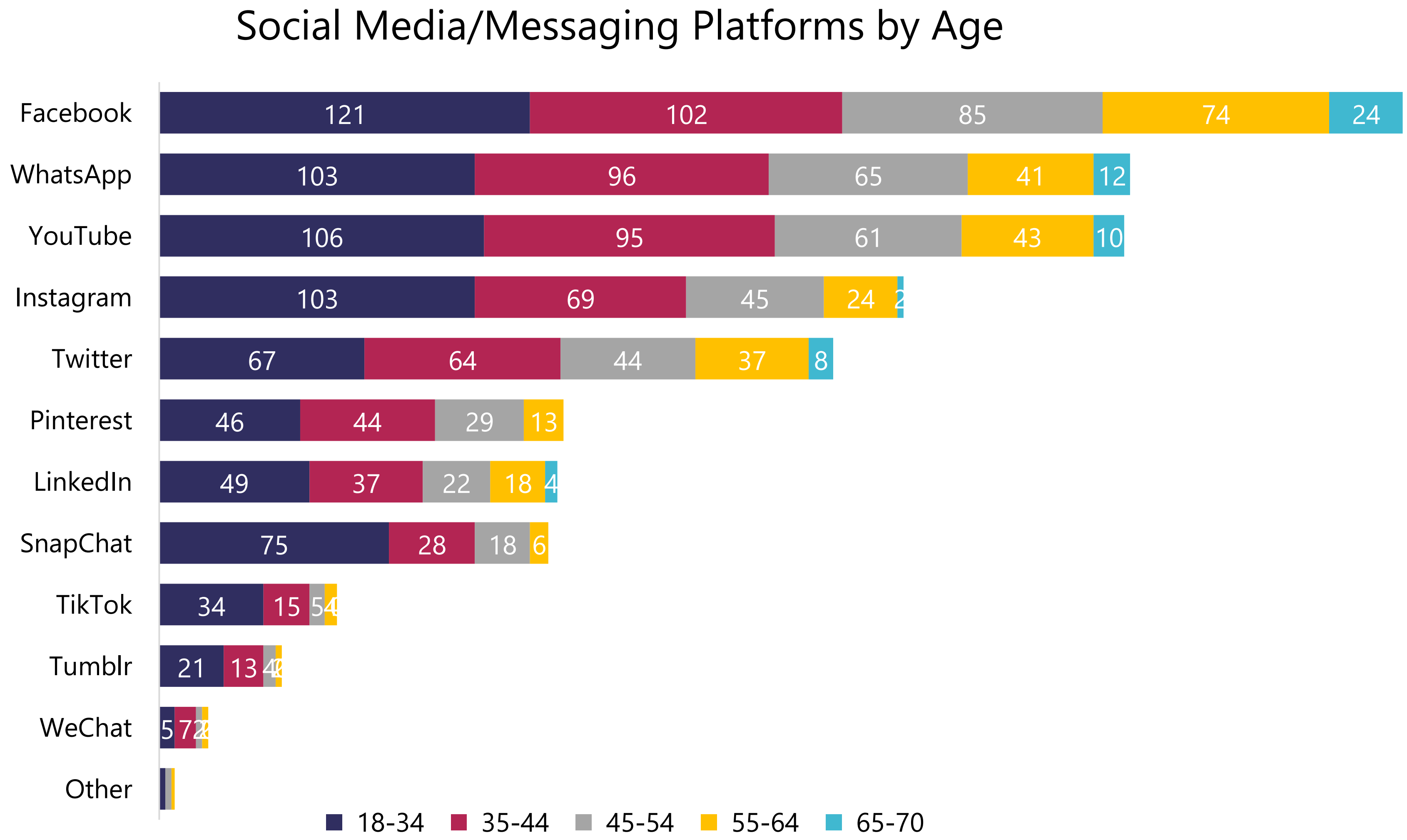
**Facebook** has the broadest and most diverse usage in terms of age groups among social media users. Instagram and Snapchat is geared towards the youngest cohort, while most others are fairly easily spread between the 18-34 and 35-44 brackets. Over-45s are not heavy users of platforms beyond the Top 5.




Q9. "Which social media and/or instant messaging services do you use?" (multiple response)
Base size: All respondents who use social media (Q8) (n=434)



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# Drinking Behaviour: UK

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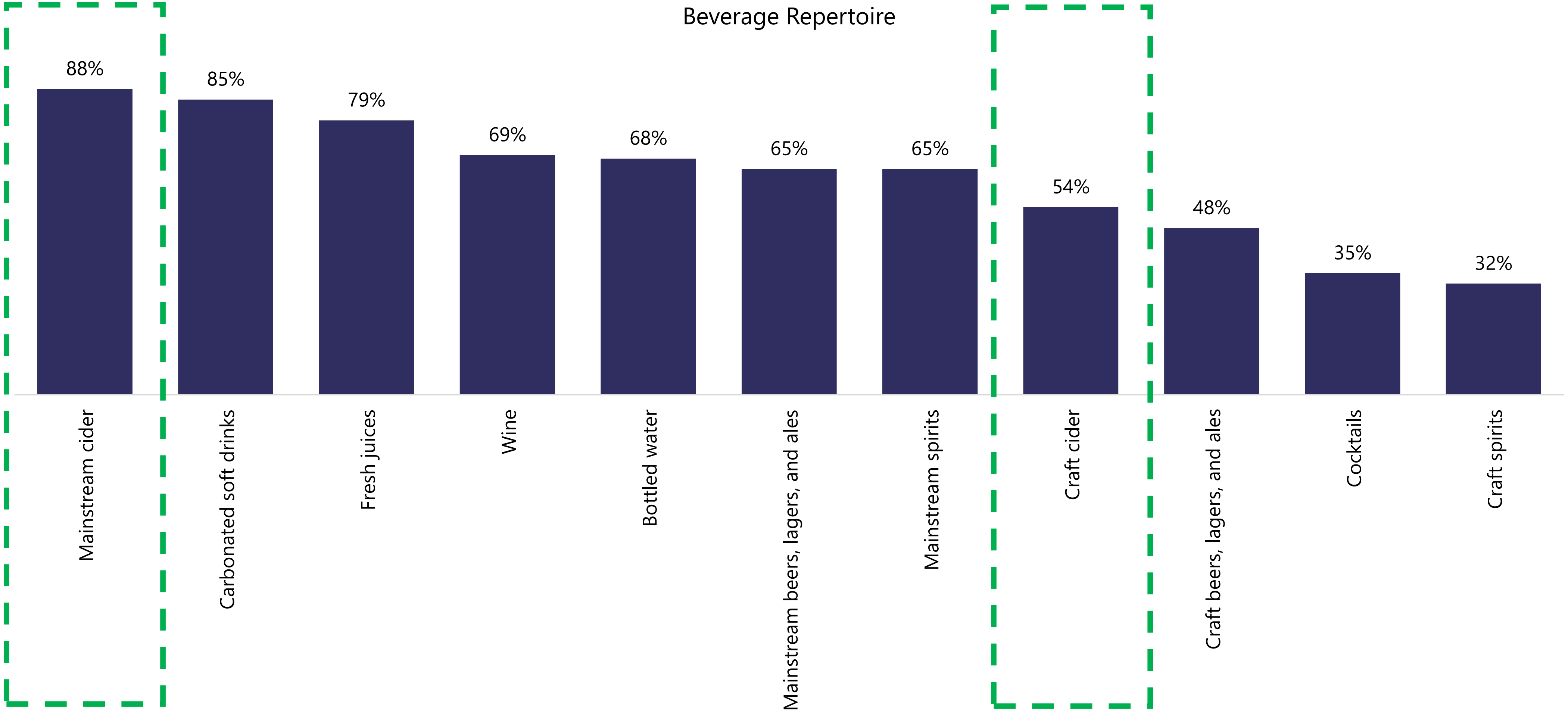
Among the cider drinkers surveyed **most identify themselves as drinking mainstream ciders** but a sizeable proportion also as **craft cider drinkers** – ahead even of craft beer.




Q7. "Which of these types of drinks do you drink at least every 2 to 3 months?" (Multiple response)
Base size: All respondents (n=500)



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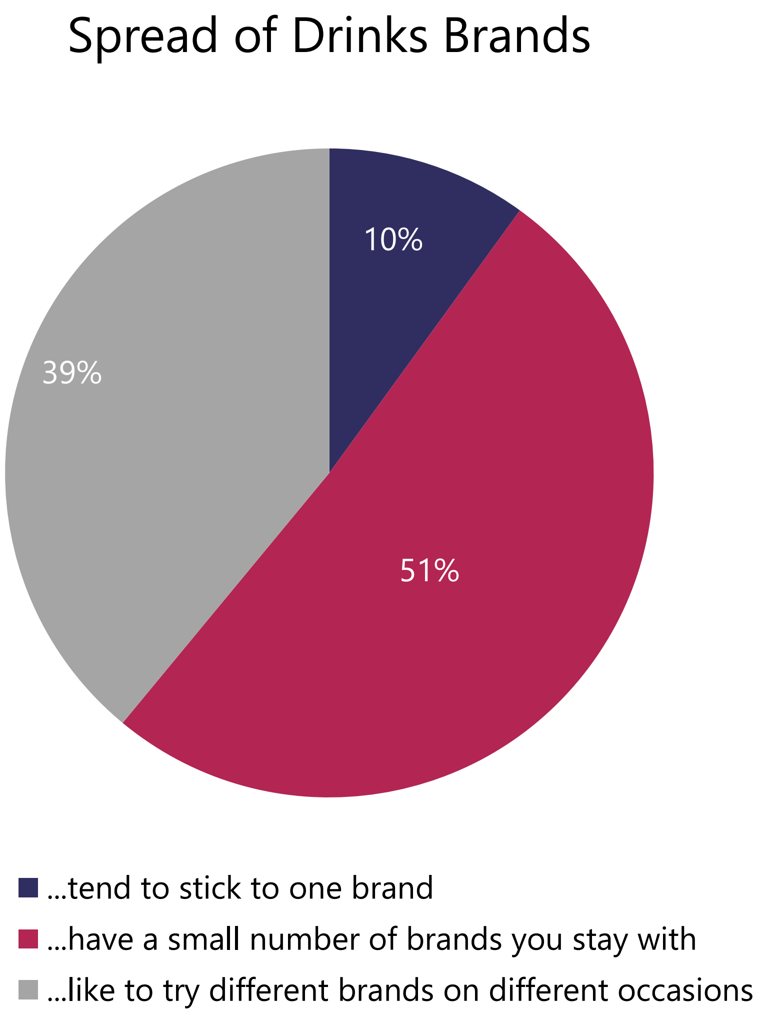
**Variety and trial** is a key consideration for UK drinkers to choose their drinks brands although this is coupled with **loyalty** to at least a small number of brands.




Q13. "When choosing drinks brands, do you… (n=500)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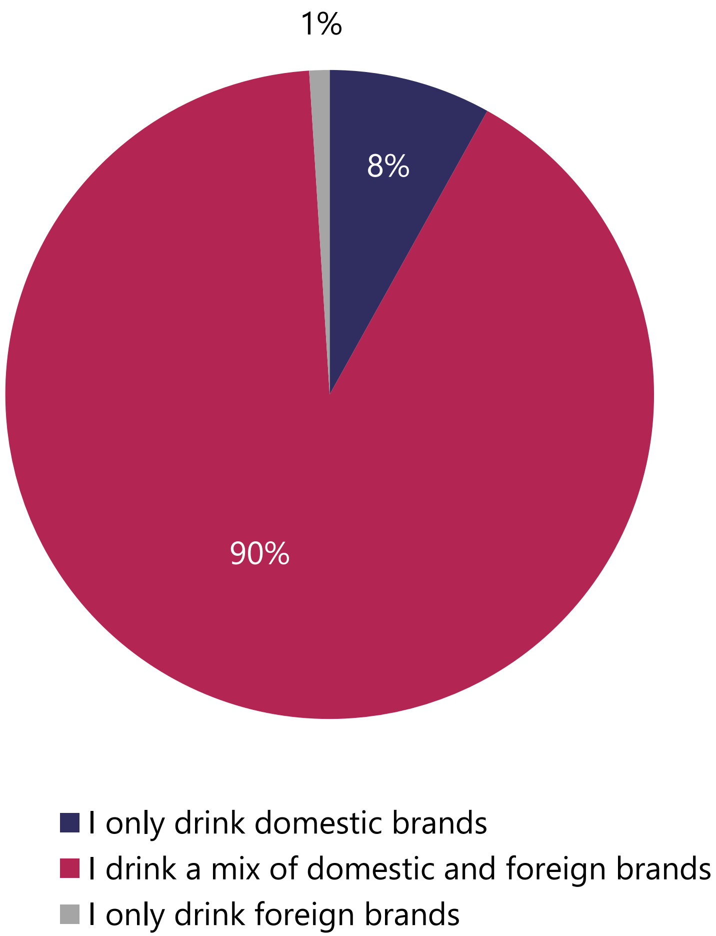
**Variety** is also key when choosing brands of different provenance. There is only a small proportion of UK drinkers surveyed who stick only to local brands, and there is no expressed preference for imported brands.

## Local or Imported Drinks?




Q14. "Do you drink domestic brands (from your own country), foreign brands, or a mix?" (n=500)



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# Attitudes Towards ‘Craft’: UK



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## **'Taste'**, **'different'**, **'better'**, **'flavour'**, **'quality'** and **'try'** are the key words used in providing reasons for choosing craft over mainstream drinks brands


Q15. "You've mentioned, that you drink craft drinks brands. In your own words, tell us why you choose them over mainstream brands?" (n=500)



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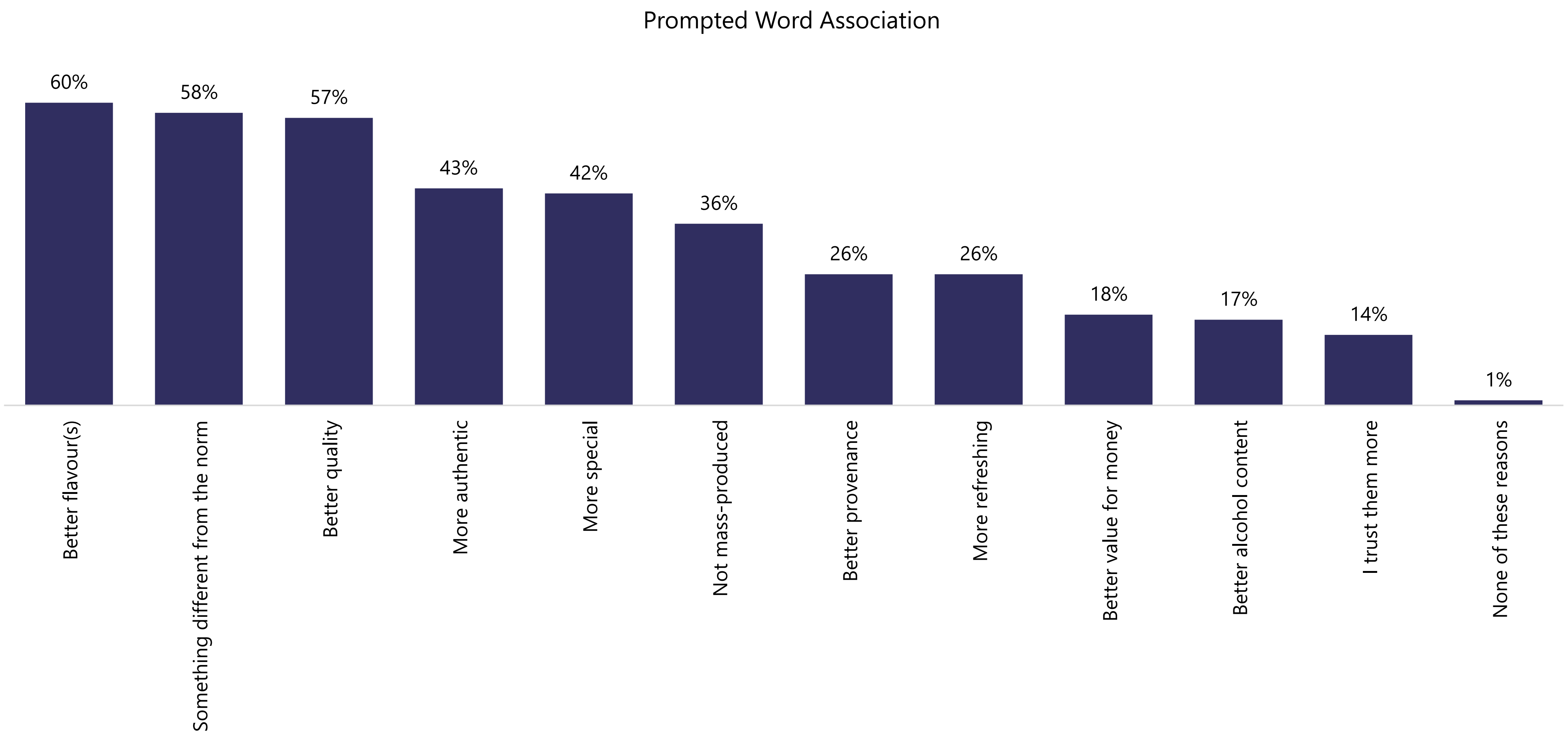
# **Superior quality** and **variety** appears to be at the forefront of why UK consumer choose craft drinks




Q16. "And which of these reasons fit with why you choose craft drinks brands over mainstream drinks brands? Please select all reasons, even if you mentioned them in the previous question?" (n=344; craft drinkers only) (Multiple response)



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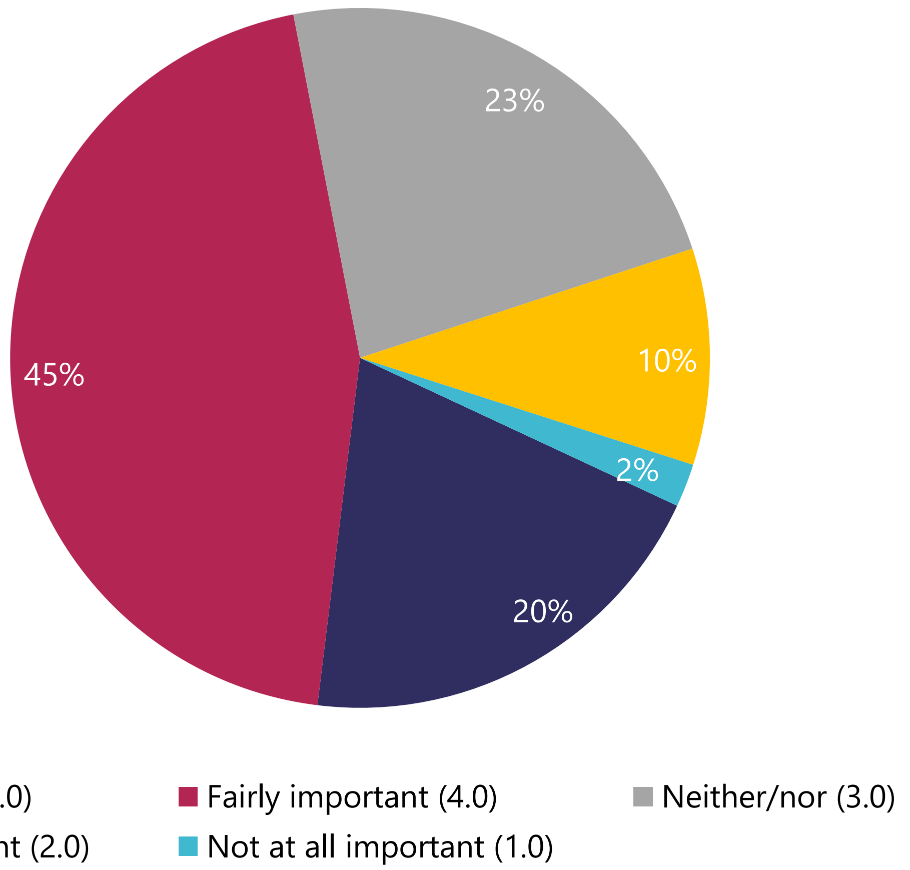
Two-thirds of respondents, **irrespective of whether they drink craft brands**, assign importance to knowing where the drinks come from. While around a quarter is ambivalent, only 12% assign little or no interest.

## Importance of Provenance




Q17. "In general, how important is it to you that you know where drinks brands come from and where they're made?" (n=500)



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# Cider Drinker Habits: UK



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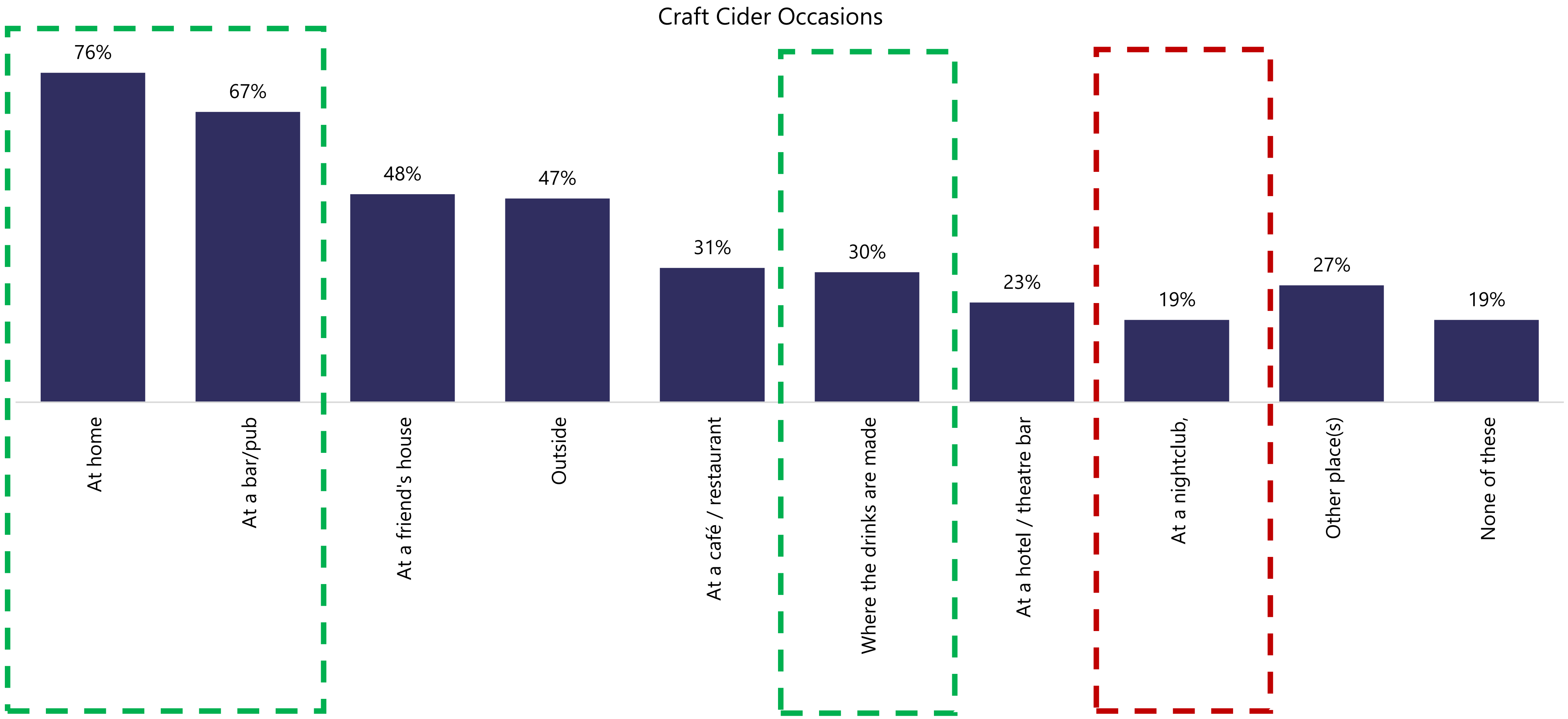
The top answers for **Craft Cider** consumption occasions/places are "**At home**" (ie through off-premise) and "**In a Bar/Pub**." Note the relatively high mention of consumption at the **place of production**, but also the low mention of high-energy occasions such as nightclubbing.




Q12. "And where do you drink Craft Cider? Please select all relevant places and events." (n=269) (Multiple response)



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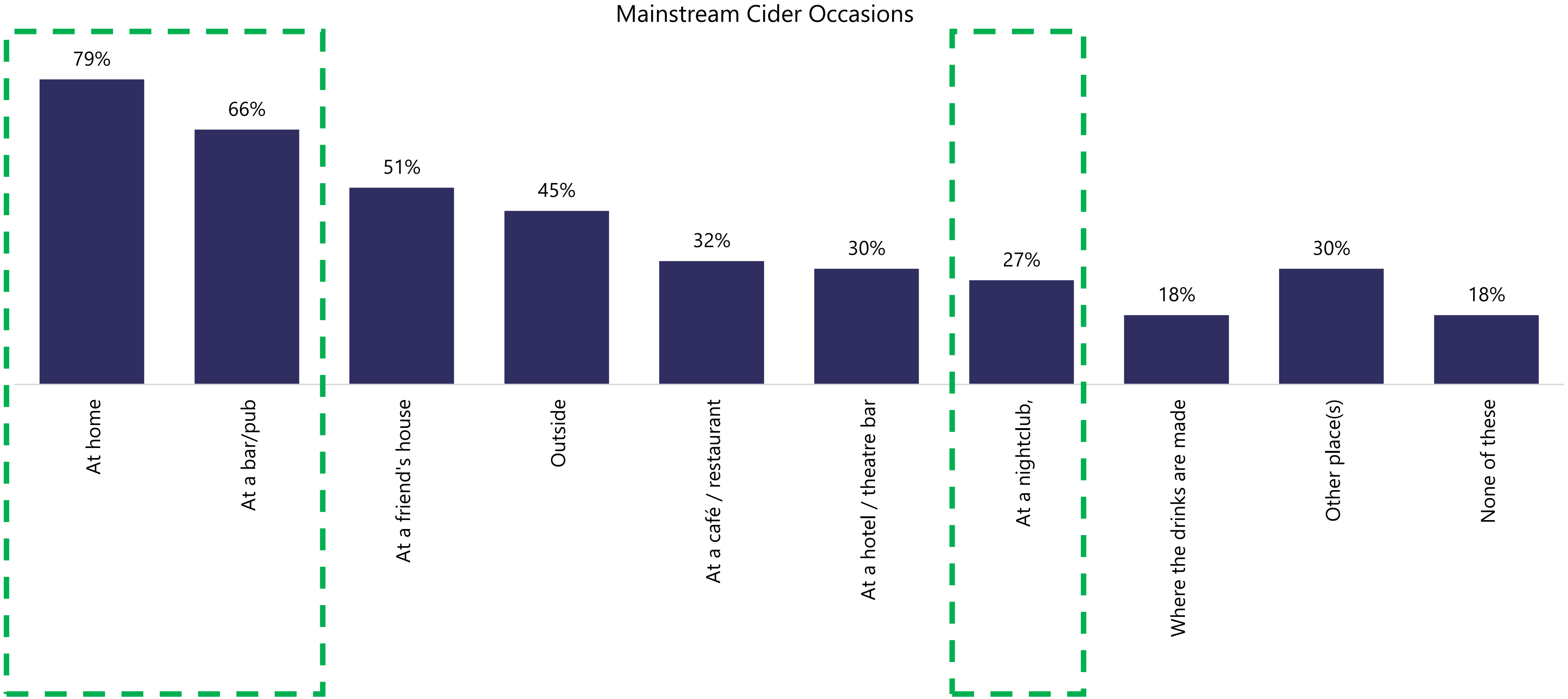
The top answers for **Mainstream Cider** consumption occasions/places are, very similarly, both “**At home”** and “**At a Bar/Pub**.” The contrast to Craft Cider is that nightclub occasions are higher, while consumption at the place of production is relatively low.




Q12. “And where do you drink Mainstream Cider? Please select all relevant places and events.” (n=438) (Multiple response)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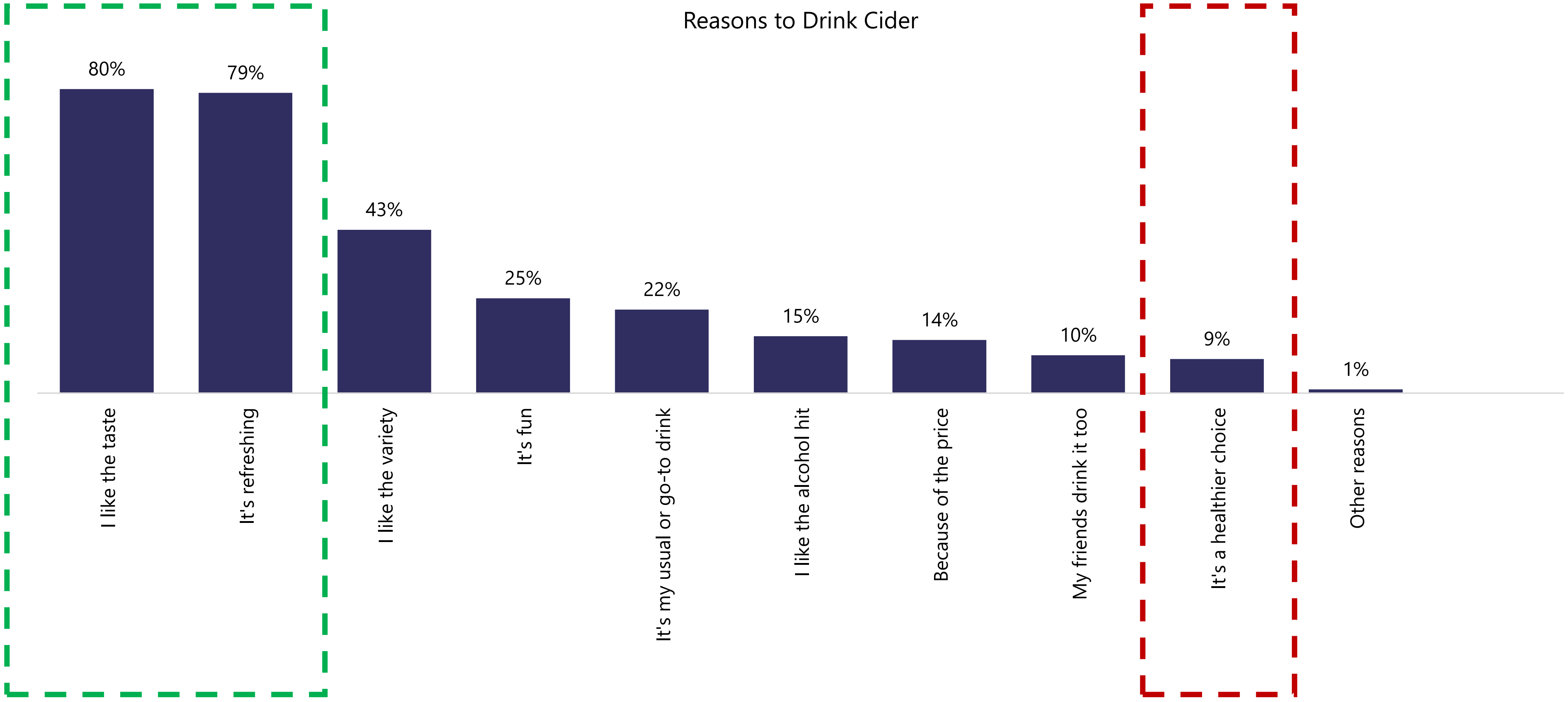
**Taste** and **refreshment** appear to be the main reasons for drinking cider. Interestingly there does **not** seem to be a connection between the fruit base and a good-for-you perception.




Q19. "Thinking about why you choose to drink cider, which of the reasons below apply to you?" (n=500) (Multiple response)



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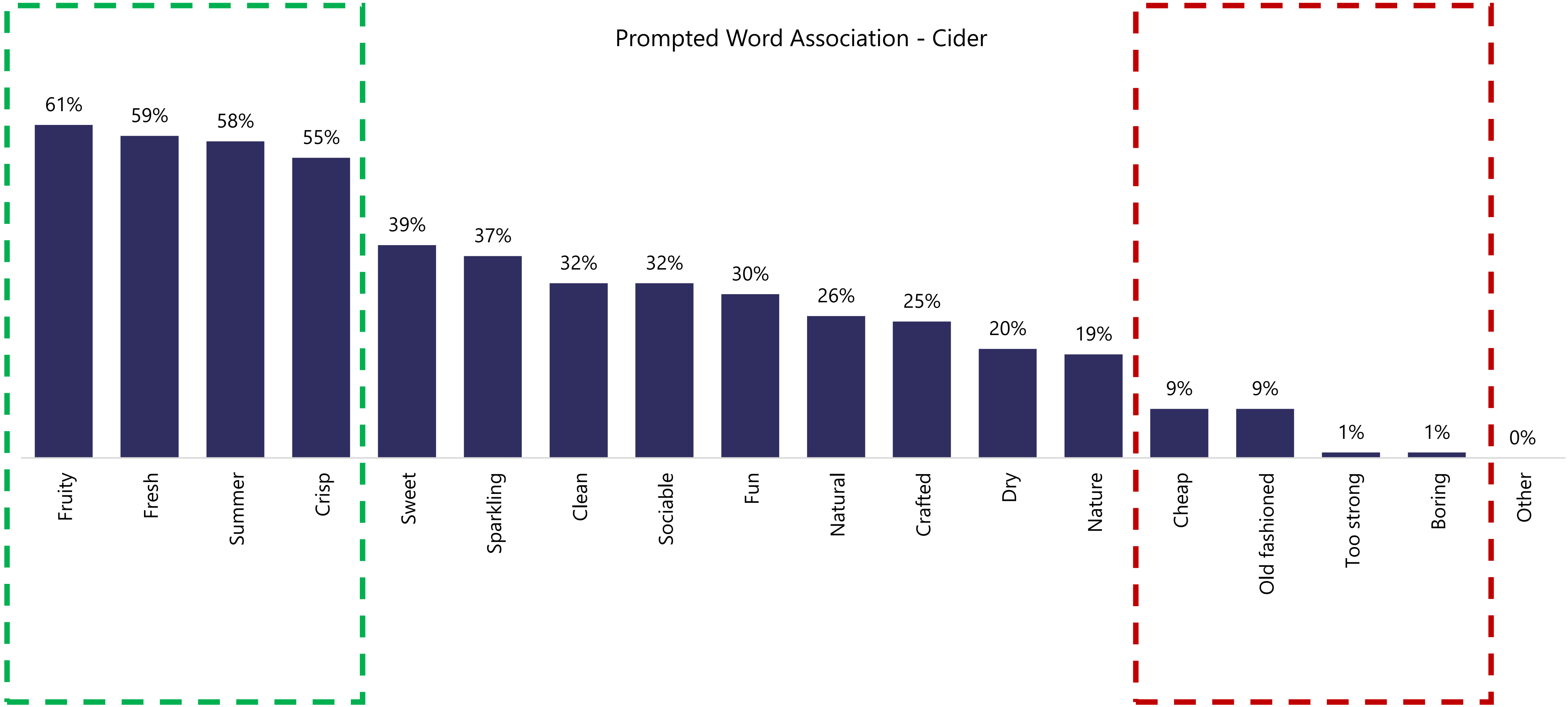
**'Fruity', 'fresh', 'summer'** and **'crisp'** are strongly associated with cider among cider drinkers, and even in the UK (which has some history of negative associations with cider) negative connotations seem to have abated. There is a wide range of other phrases with some resonance. Note that among UK cider drinkers 'crafted' is not a top mention.




Q20. "And when you think about cider, which of these words come to mind?" (n=500) (Multiple response)



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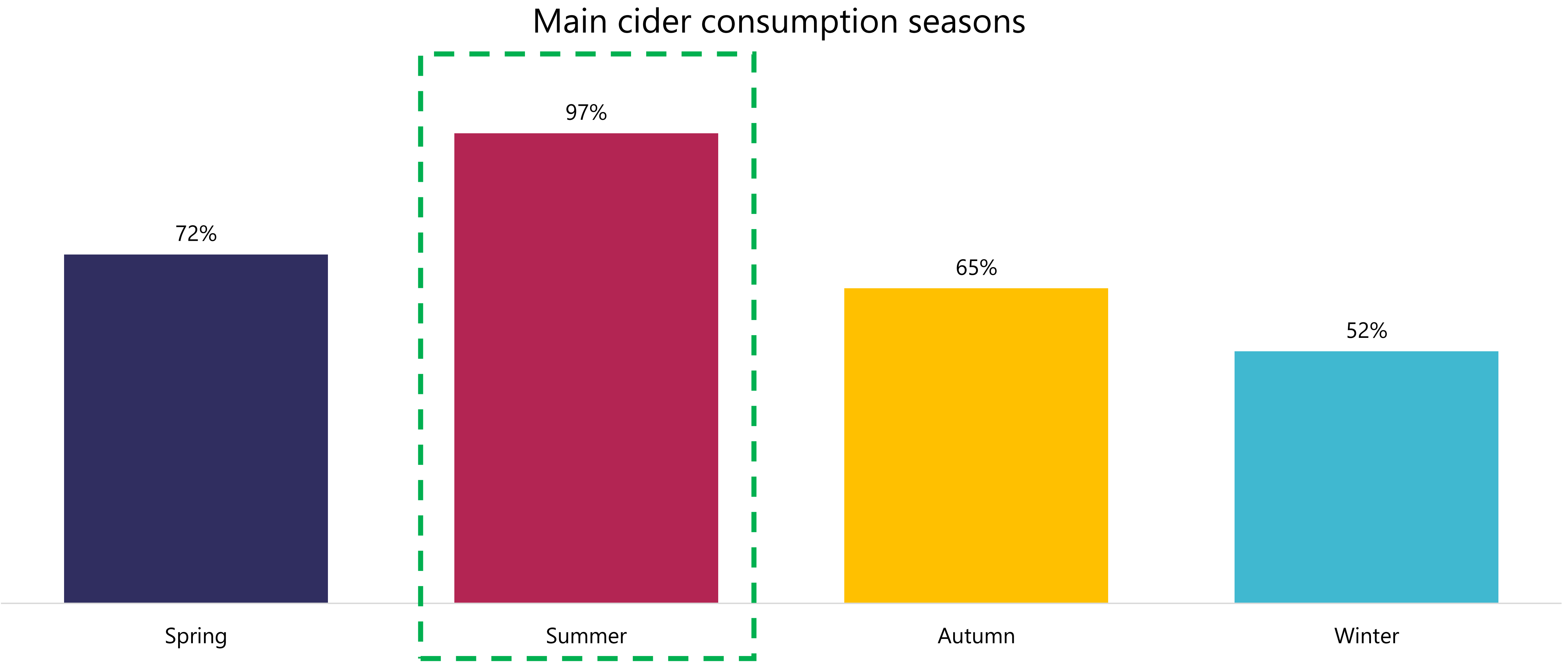
**Summer** (Jun-Aug) is a key season for UK cider drinkers when virtually all respondents claim to have some consumption. There is, however, **significant year-round consumption**, with more than half of respondents claiming to consume even in winter (Dec-Feb).




Q21. "Which times of the year do you drink cider? Please select all that apply" (n=500)



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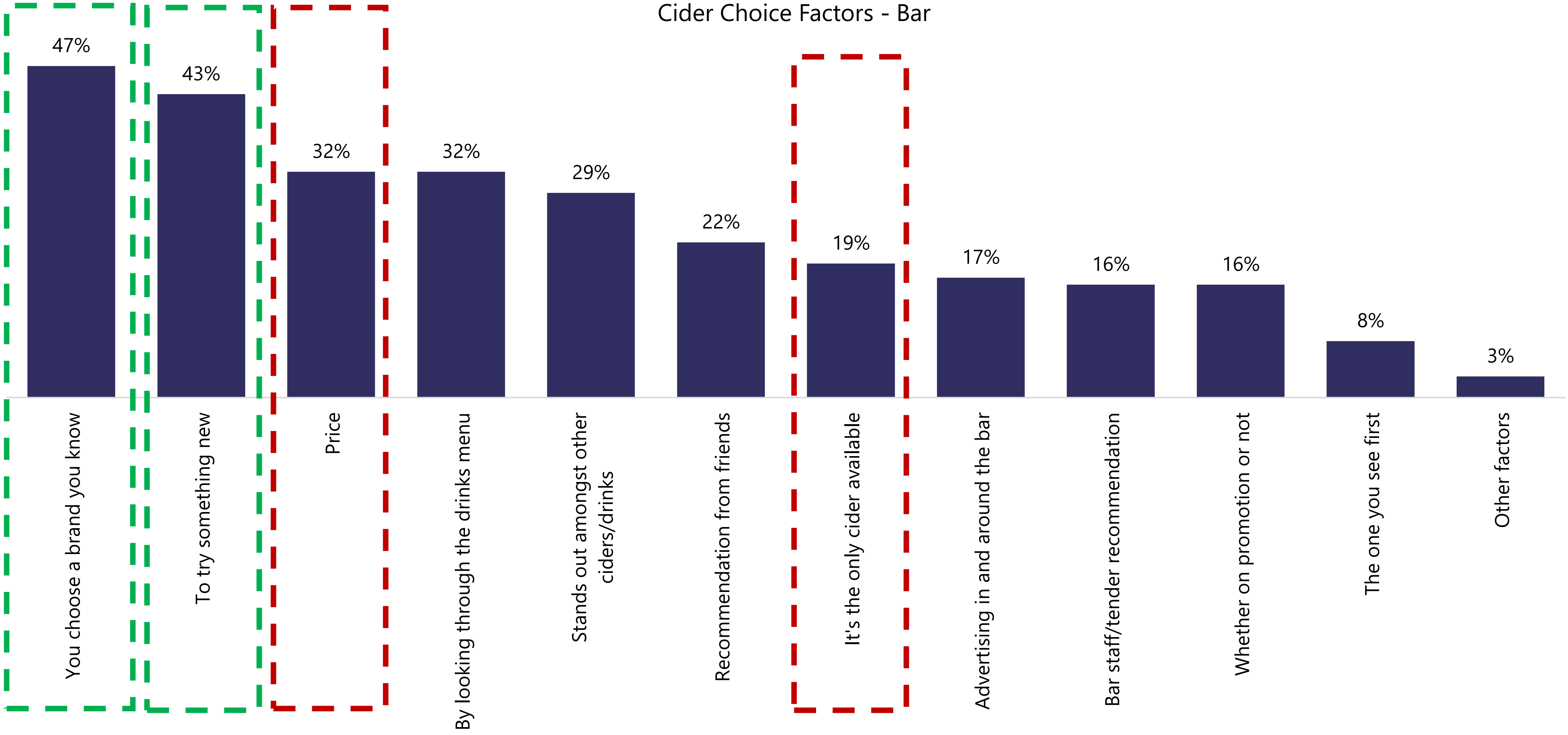
In on-premise, **familiarity** with a brand is a key factor, but so is **novelty**. Sadly, **lack of choice** in on-premise remains a factor, and **price considerations** feature strongly, although active price promotions in on-premise are not crucial.




Q22. "Thinking about when you're in a **bar**, what are the factors that help you choose which brand of cider to order? Please think about all the different times you've ordered cider." (n=500) (Multiple response)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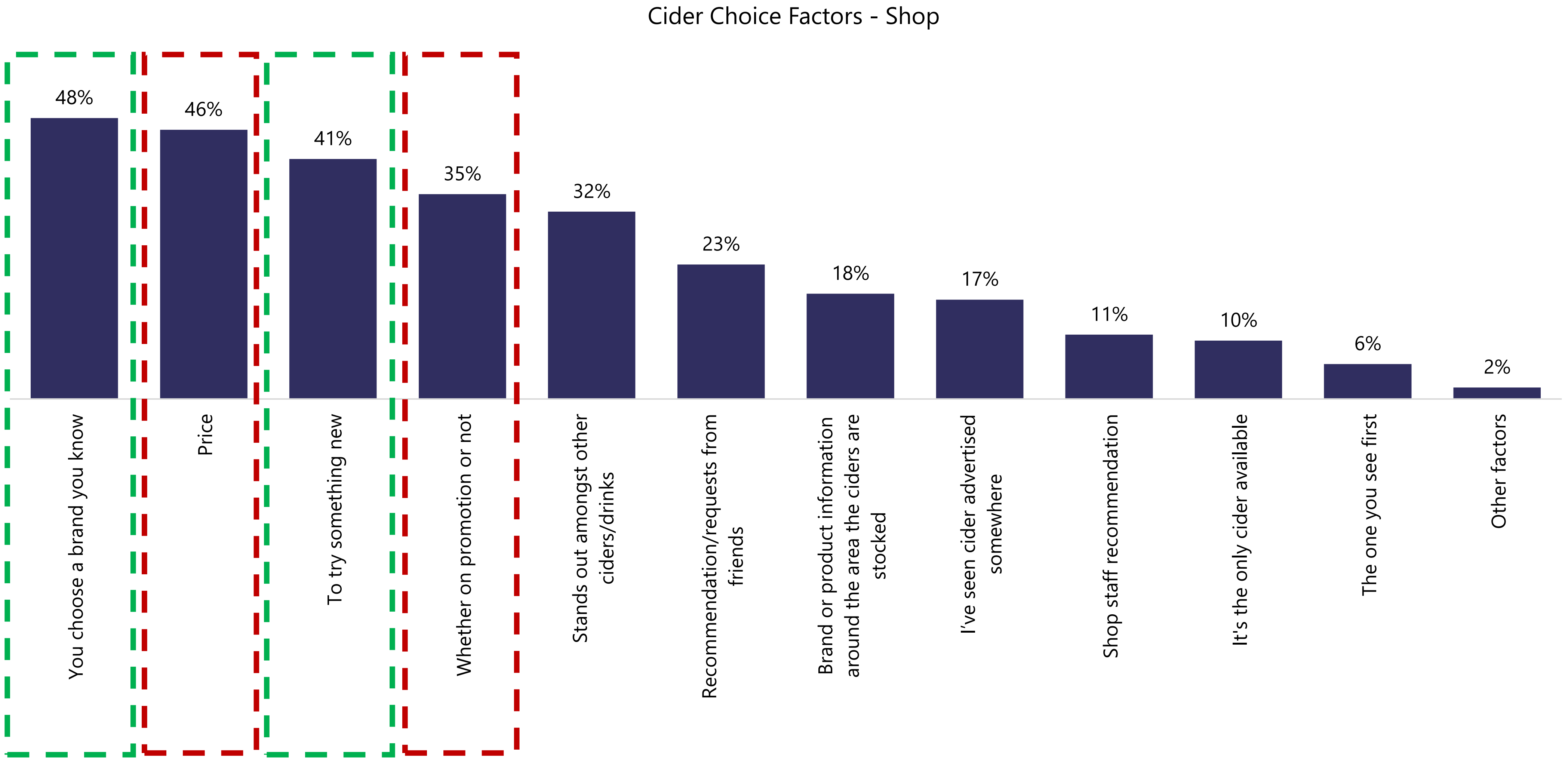
In off-premise, **price** and **active promotions** are very important choice considerations, but so are – once again, both **familiarity** and **novelty**. Merchandising instruments and, indeed, advertising are not claimed to have significant impact on respondents' cider choices.




Q23. "Similarly, when you're buying from a **shop**, what are the factors that help you choose which brand of cider to order? Please think about all the different times you've bought cider.." (n=500)



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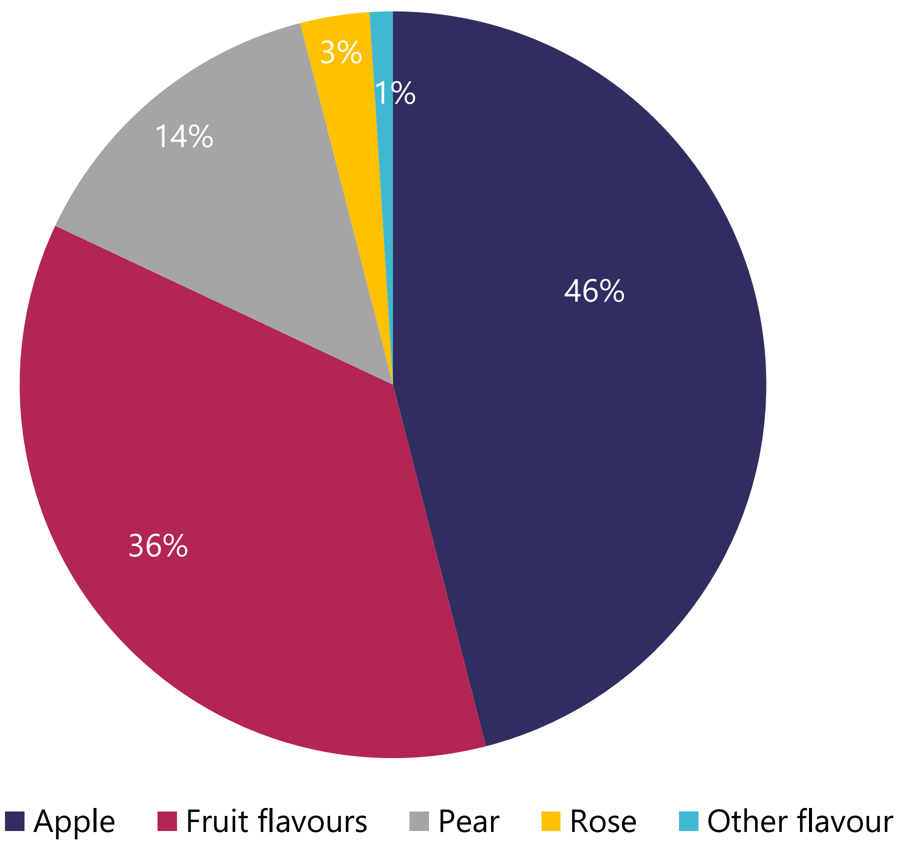
Traditional apple flavour is the respondents' favourite, but **fruit flavours** are high on the list. Pear ciders (or 'perries') still have significant mention. The appearance of rosé ciders in the UK is yet to translate into consumer enthusiasm.

## Favourite Cider Flavour




Q24. "Which is your favourite cider flavour?" (n=500)



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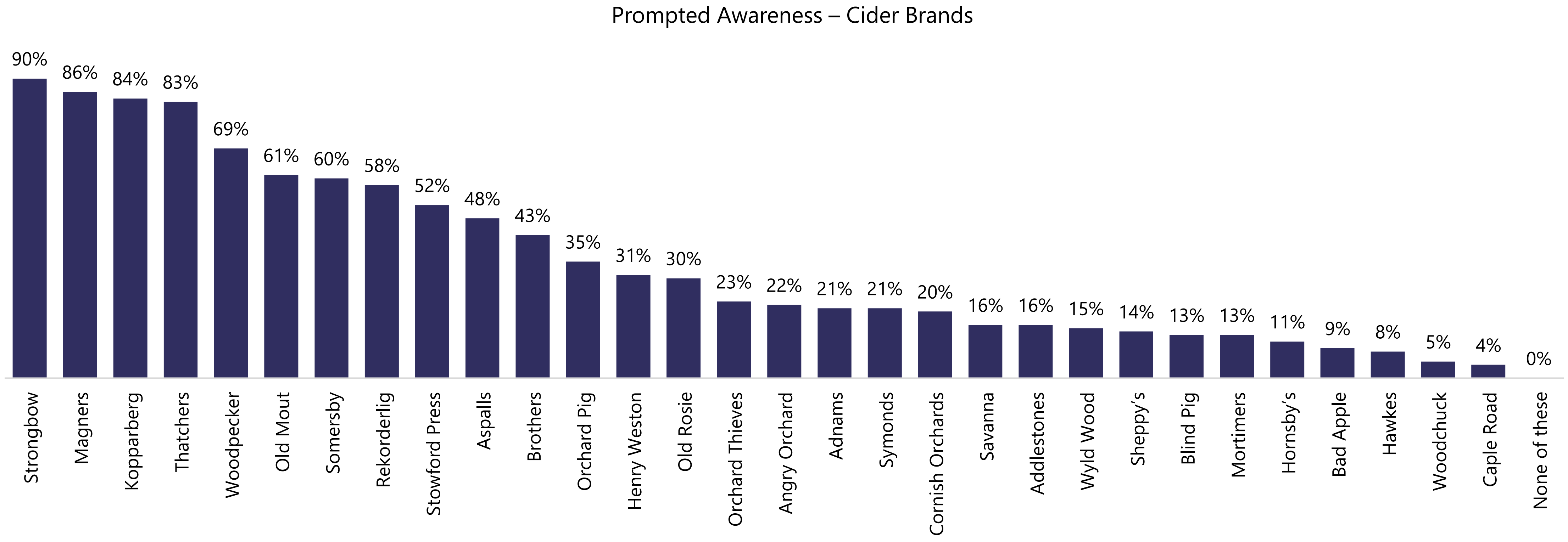
Recognition rates for leading mainstream cider brands are strong among UK cider drinker respondents. There is, however, also **relatively significant recognition even among smaller and craft brands**, with the majority of brands in the double digits.




Q25-1. "Looking at the list of cider brands below, which are you aware of?" (n=500)



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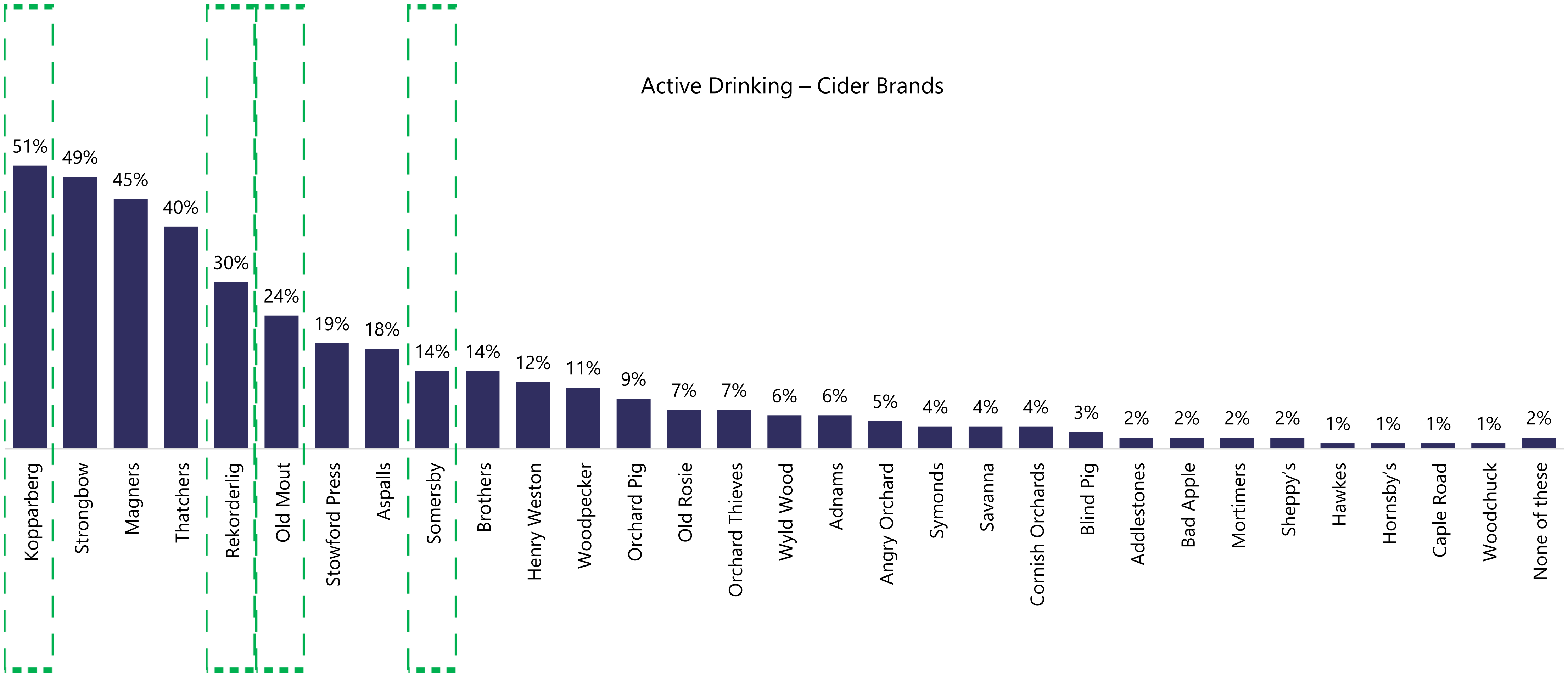
Active drinking rates are significantly lower than recognition rates for most of the brands. Several brands with the highest consumption claims are **exclusively flavoured ciders**, including the leading one, **Kopparberg**, as well as **Rekorderlig**, **Old Mout** and **Somersby**.




Q25-2. "And which, if any, do you currently drink?" (n=500) – brands displayed that were answered with "aware of" in Q25-1



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# Attitudes towards Australia and Australian Cider: UK



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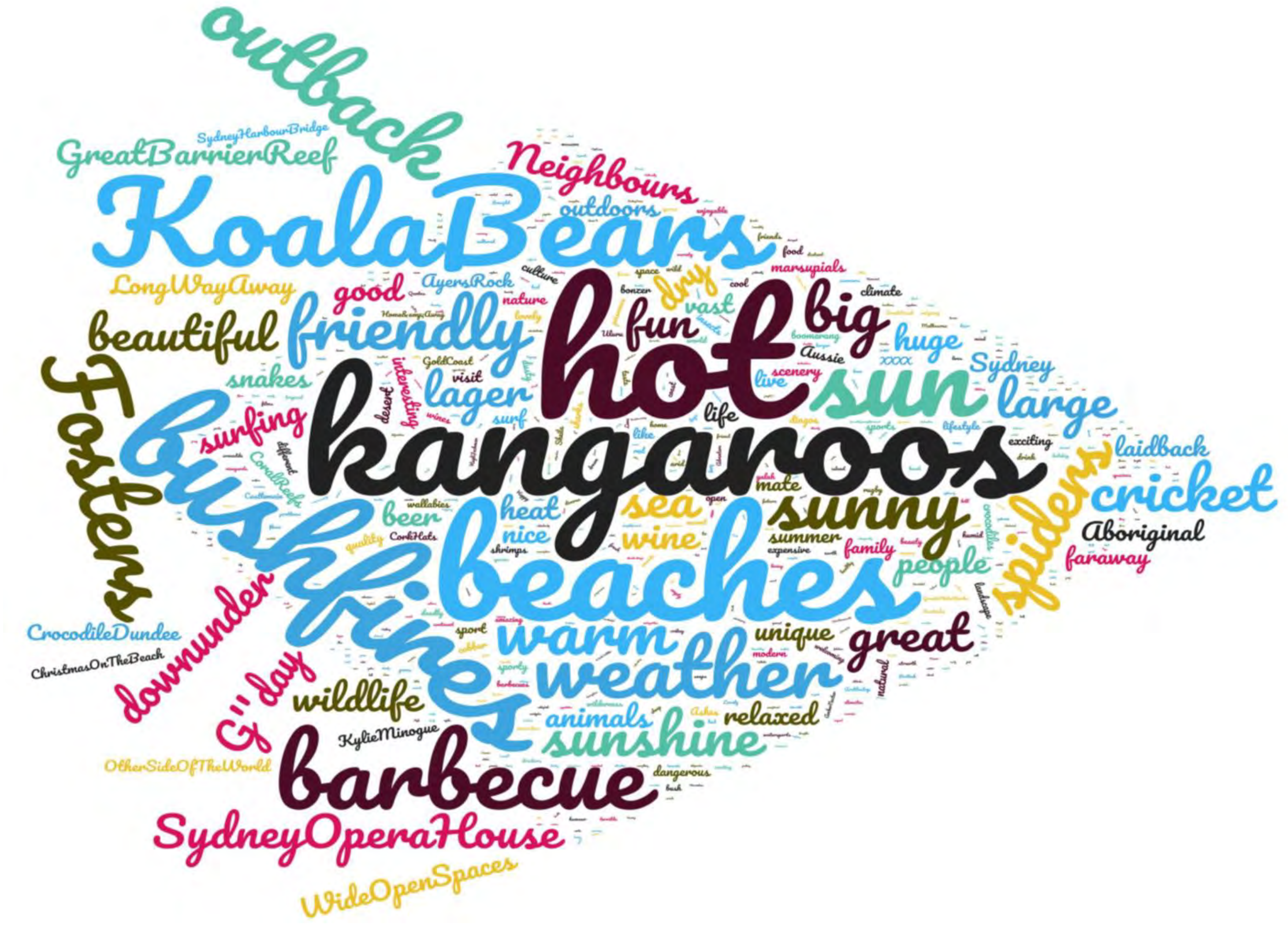
**Wildlife, climate** and **tourism-related expressions** score highly in unprompted word association on Australia, as does the term **'bushfires'.** Interesting drinks-related mentions are the high scoring of **Fosters, lager and beer**, with wine somewhat behind. **Cider did not have any mentions, nor did fruit**.




Q26. "In your own words, please tell us the words and phrases that come to mind when you think of Australia? (n=500)



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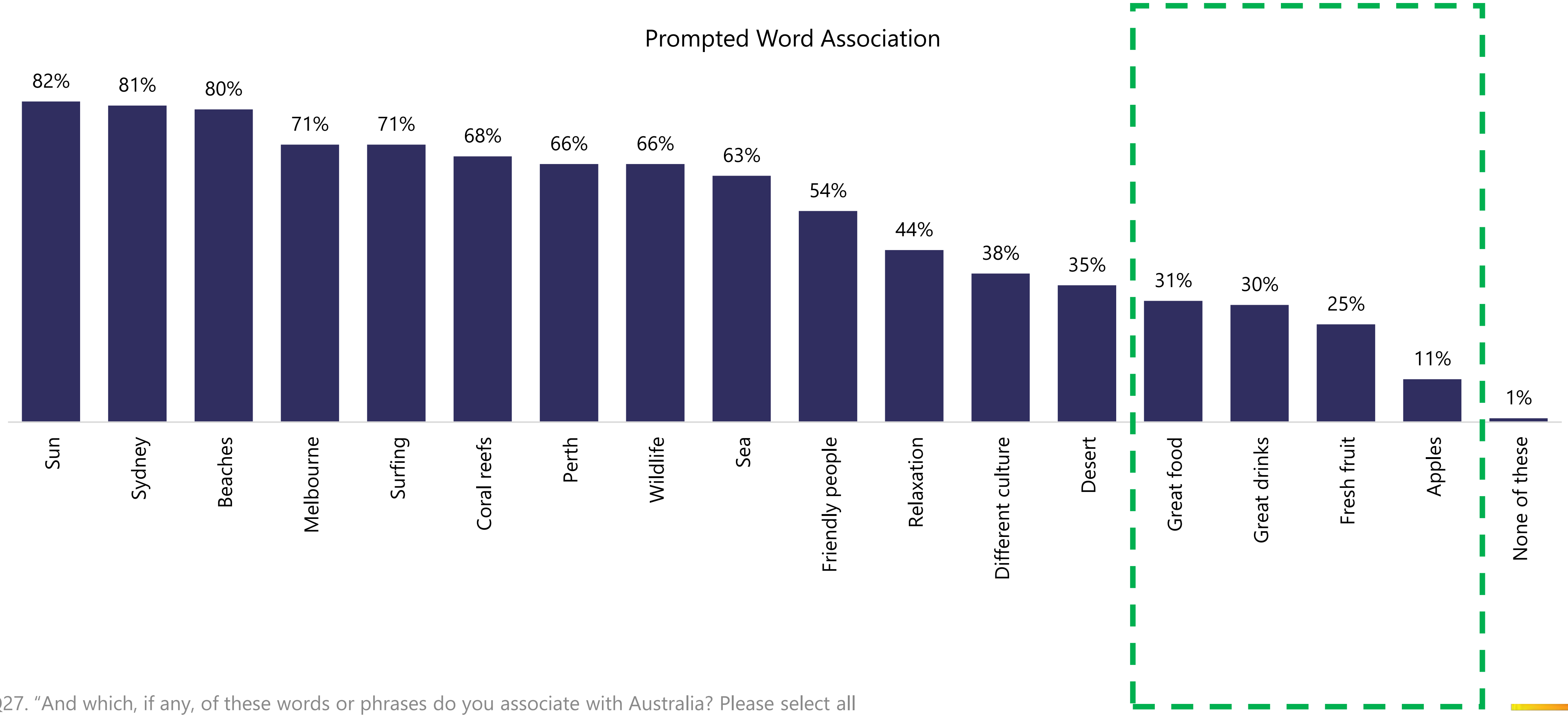
# Food, drink and indeed fruit and apples are relatively low in terms of **prompted** word association




Q27. "And which, if any, of these words or phrases do you associate with Australia? Please select all associations, even if you've mentioned them in the previous question" (n=500)



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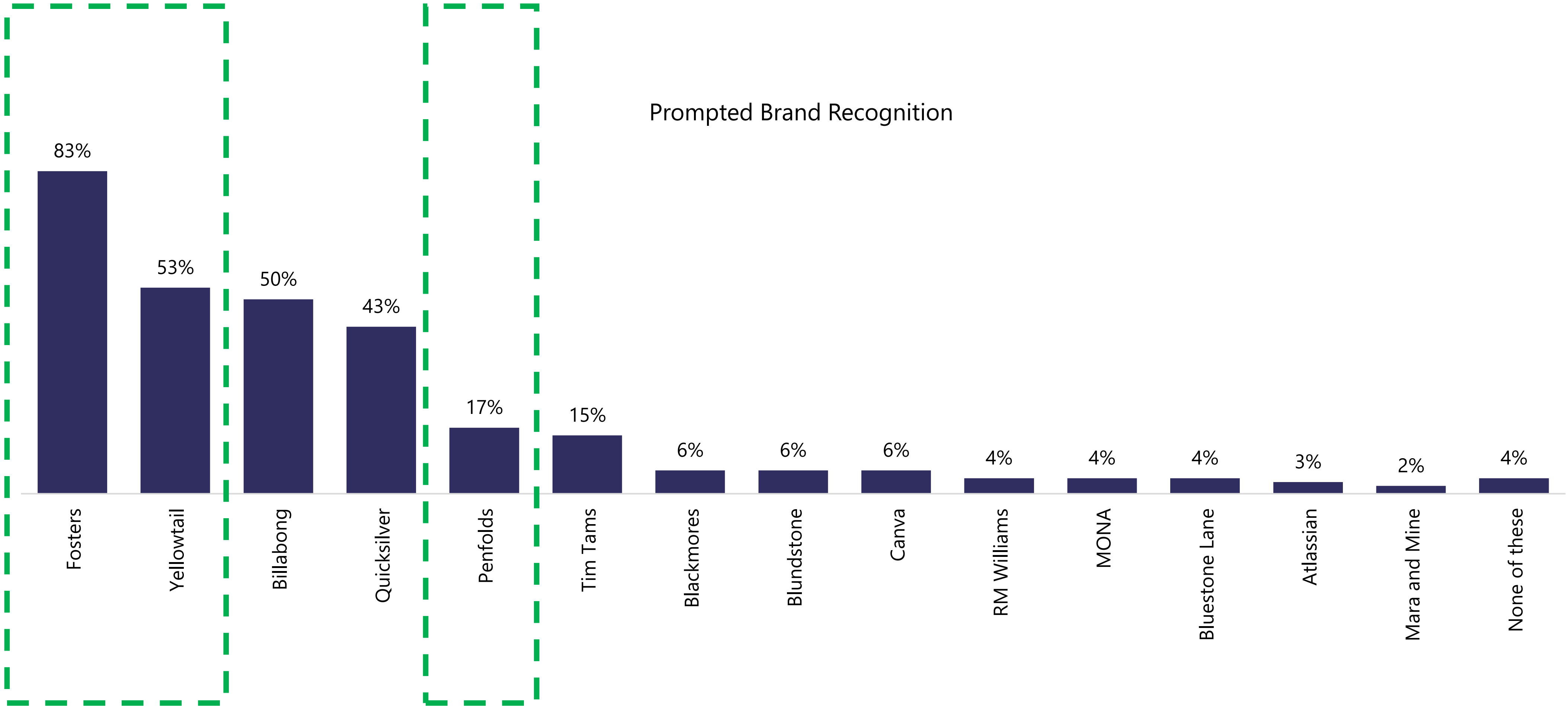
**Fosters** follows the unprompted word association of Q26 with relatively **high recognition**, some way ahead of the next popular mention, wine brand **Yellowtail**. Clothing brands **Billabong and Quicksilver** are the only other Australian brands tested with significant recognition rates. Other brands tested – including **Penfolds** – appear to be not well-known.




Q28. "Which, if any, of these Australian brands are you aware of? " (n=500)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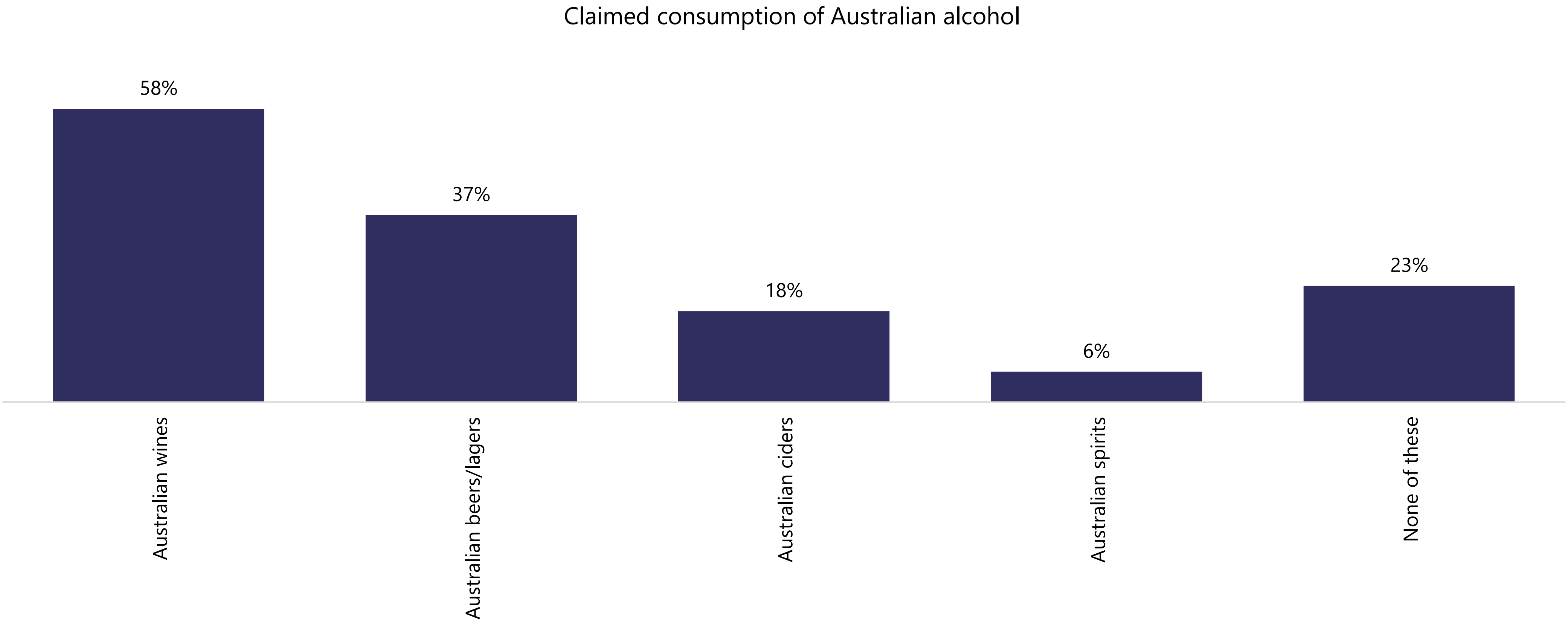
# While **Fosters** is well-known as an Australian brand (Q28) actual claimed consumption of Australian beers is significantly lower than that of **Australian wines**. Claimed consumption of Australian ciders is high given the low penetration in the UK in actual terms.




Q29. "Do you drink...?" (n=500)



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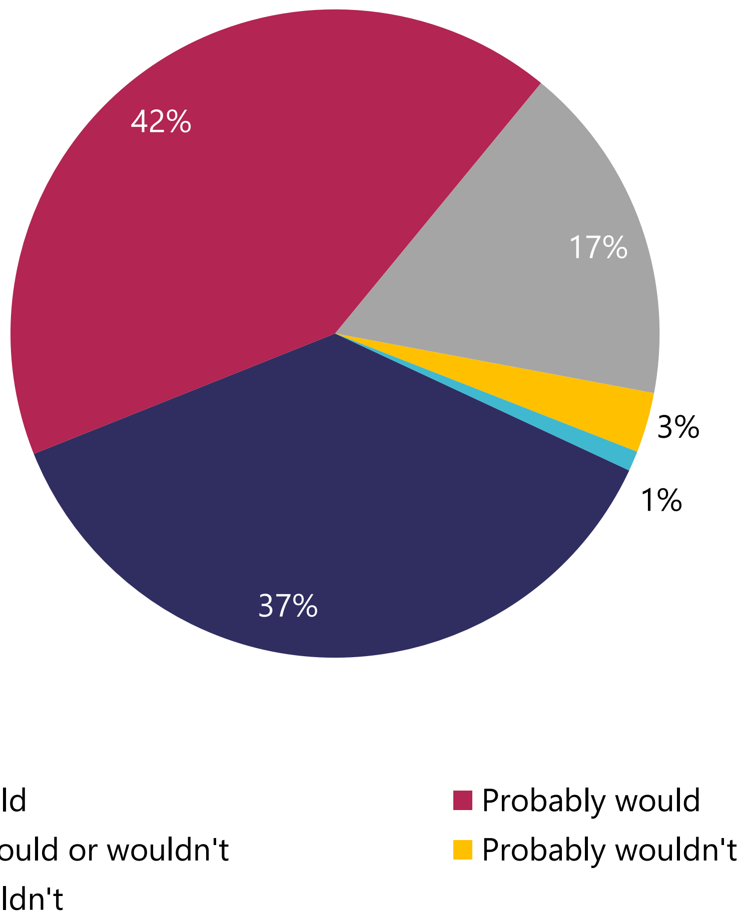
UK cider drinkers **would overwhelmingly consider** trying Australian ciders, with only 17% of them ambivalent and 4% disinclined

## Likelihood of considering Australian Cider




Q30. “How likely would you be to consider an Australian cider?” (n=410)

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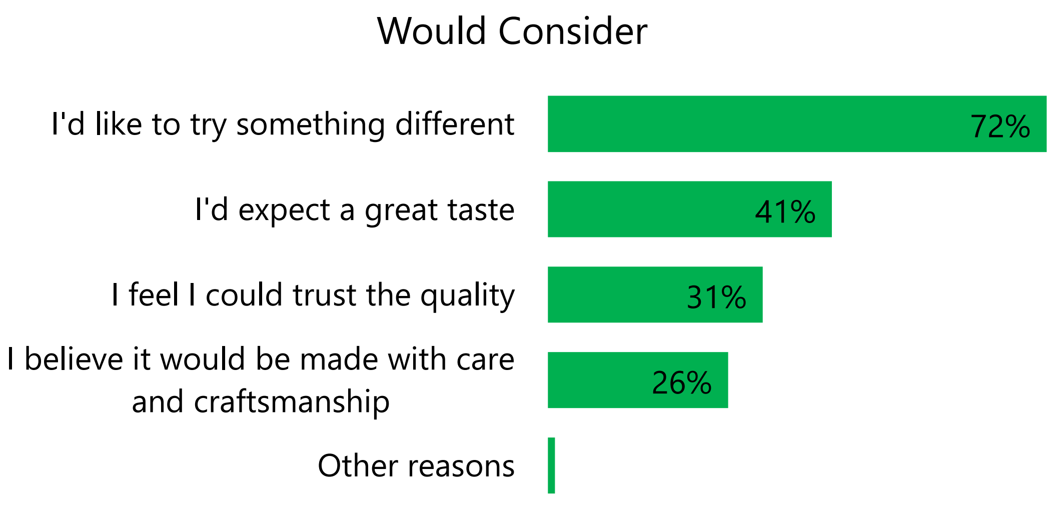
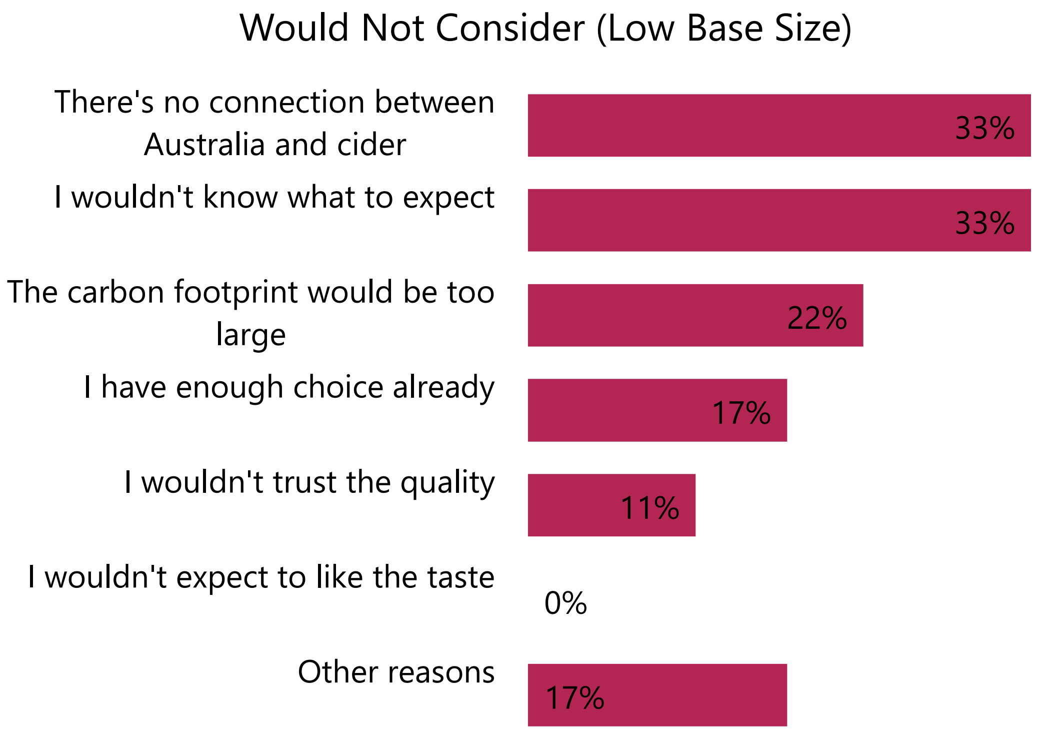
**Variety and adventurism** is at the forefront of UK cider drinkers willing to consider Australian ciders. Those few UK cider drinkers who would not consider trying Australian ciders mainly cite **unfamiliarity** as their main reason.




Q31. “And why do you say you WOULD consider an Australian cider?” (n=323) – respondents answering “definitely would” or “probably would” to Q30

Q32. “And why do you say you WOULD NOT consider an Australian cider?” (n=18) - respondents answering “probably wouldn’t” or “definitely wouldn’t” to Q30



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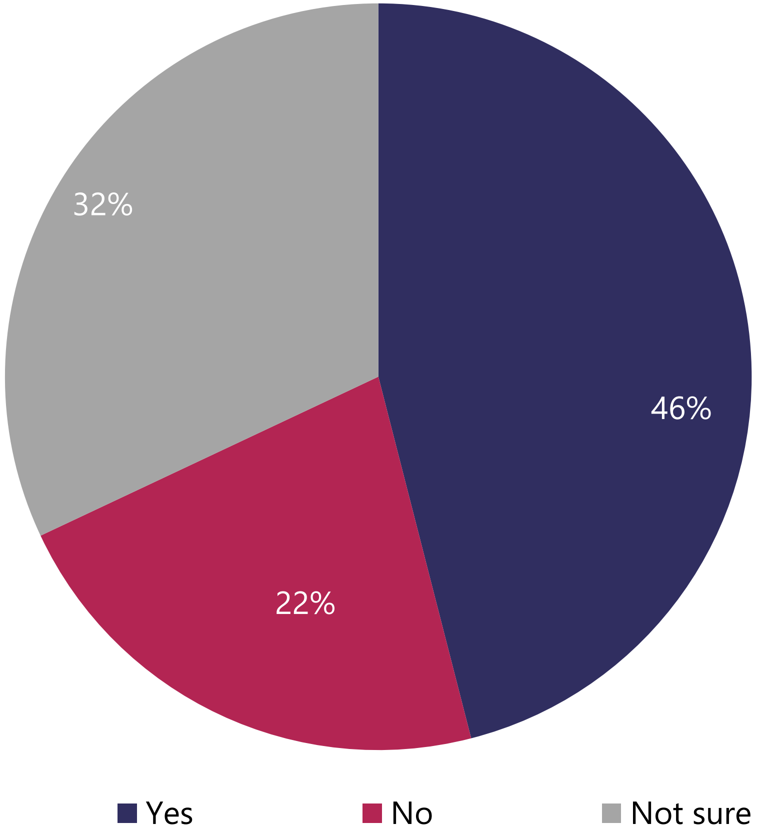
While there is a **relatively positive response** to the Cider Australia authenticity logo there is a strong degree of ambivalence among a third of respondents, and a fifth of respondents deemed themselves untouched by the logo.

## Cider Australia Logo




100% AUSTRALIAN GROWN

Q33. "Please look at this image. If you saw this on an Australian cider brand, would that make you more likely to consider an Australian cider? (n=349)

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## About the IWSR

The IWSR is the leading source of data and intelligence on the alcoholic beverage market. The IWSR's database, essential to the industry, quantifies the global market of wine, spirits, beer, cider, and mixed drinks by volume and value in 157 countries, and provides insight into short- and long-term trends, including five-year volume and value forecasts. The IWSR tracks overall consumption and trends at brand, price segment and category level. Our data is used by the major international wine, spirits and beer companies, as well as financial and alcoholic beverage market suppliers.

The IWSR's unique methodology allows us to get closer to what is actually consumed and better understand how markets work. Our analysts travel the world in order to meet more than 1,600 local professionals to capture market trends and the 'why' behind the numbers.

For more information about the IWSR's products and subscription costs, please contact enquiries@theiwsr.com


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