The Off Trade Cider Market

Spring 2019 Report

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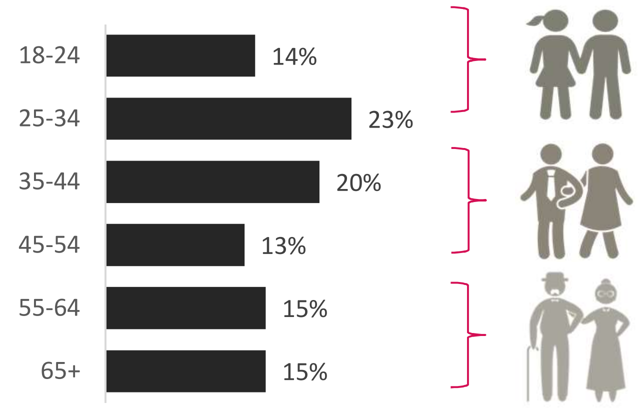
Cider insights – who we spoke to

Online survey

302
respondents took part

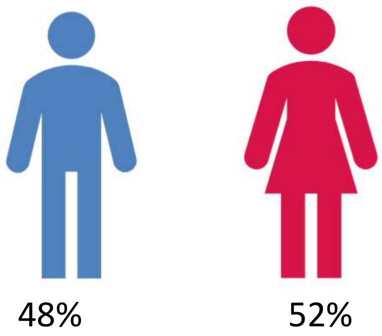
87% drink at least one category off trade

Age profile

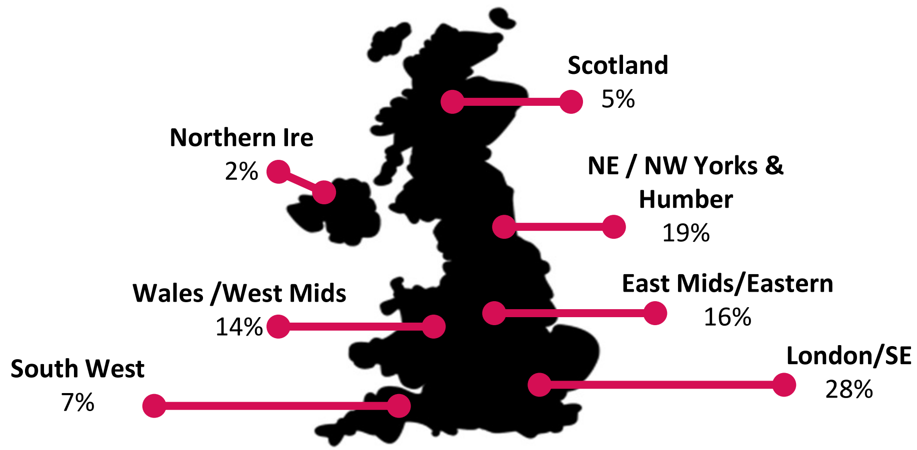


Combined age groups
37%
33%
30%

Gender



Region



Main themes

An exciting, fast-moving category

4 in 10 consumers see it as a 'innovative drink type' at the moment – can the industry continue to keep up?

Refreshment, Summer and Flavours are key associations with this category – no doubt driven by recent innovations with fruit flavourings in the standard market

42%

Consumers associate Cider with fruit flavourings

One third of Cider drinker now see the category as Premium –

how can we drive 'premiumisation' further?

	1st	2nd	17%
Current key brands:	Strongbow	Bulmers	Magners

Whilst the 'big' brands still dominate the category, there is good knowledge and growing appetite in alternative brands that offer something different. This will help provide further 'threat' to the beer and lager categories

Two-thirds

of consumers expect to see Cider available in these formats

Larger cans and bottles still dominate but some evidence that younger drinkers in particular for are looking to smaller format

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Category innovation

Category perceptions of appeal and innovation

	Spirits	Cider	Craft beer	White/Red Wine	Ales/Beer	Premium/ World lager	Sparkling wine
All	**48%**	**39%**	**31%**	**27%**	**24%**	**22%**	**22%**

Undoubtedly influenced by the massive growth seen in Gin in recent years, Spirits lead the way amongst drink types perceived to be the most innovative

13% None of the above

Q1. Which of the following alcoholic drink types (that you might buy in-store) do you consider to be the most innovative at the moment (e.g. in flavours, ingredients, packaging, promotions, etc)? Base: 302

Category perceptions of appeal and innovation

	Spirits	Cider	Craft beer	White/Red Wine	Ales/Beer	Premium/ World lager	Sparkling wine
All	**48%**	**39%**	**31%**	**27%**	**24%**	**22%**	**22%**
Current drinkers in that category	**74%**	**73%**	**72%**	**41%**	**53%**	**52%**	**53%**

Q1. Which of the following alcoholic drink types (that you might buy in-store) do you consider to be the most innovative at the moment (e.g. in flavours, ingredients, packaging, promotions, etc)? Base: 302

Category perceptions of appeal and innovation

		Male	Female	18-34 yrs	35-54 yrs	55 yrs and over
Spirits	48%	40%	56%	56%	51%	34%
Cider	39%	38%	40%	49%	44%	21%
Craft beer	31%	36%	26%	29%	43%	21%
Wine	27%	24%	30%	35%	26%	19%
Ale	24%	27%	21%	28%	30%	12%
Lager	22%	27%	17%	24%	29%	12%
Sparkling wine	22%	11%	32%	26%	27%	11%

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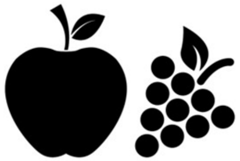
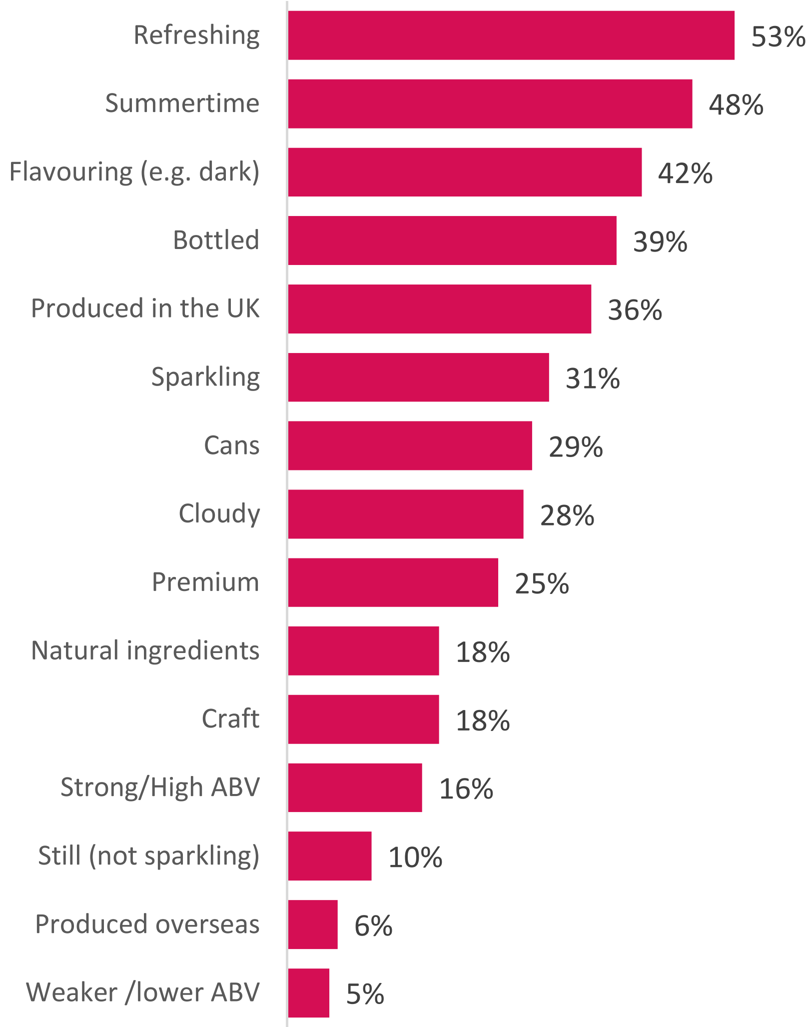
Q1. Which of the following alcoholic drink types (that you might buy in-store) do you consider to be the most innovative at the moment (e.g. in flavours, ingredients, packaging, promotions, etc)? Base: 302

Cider Attributes

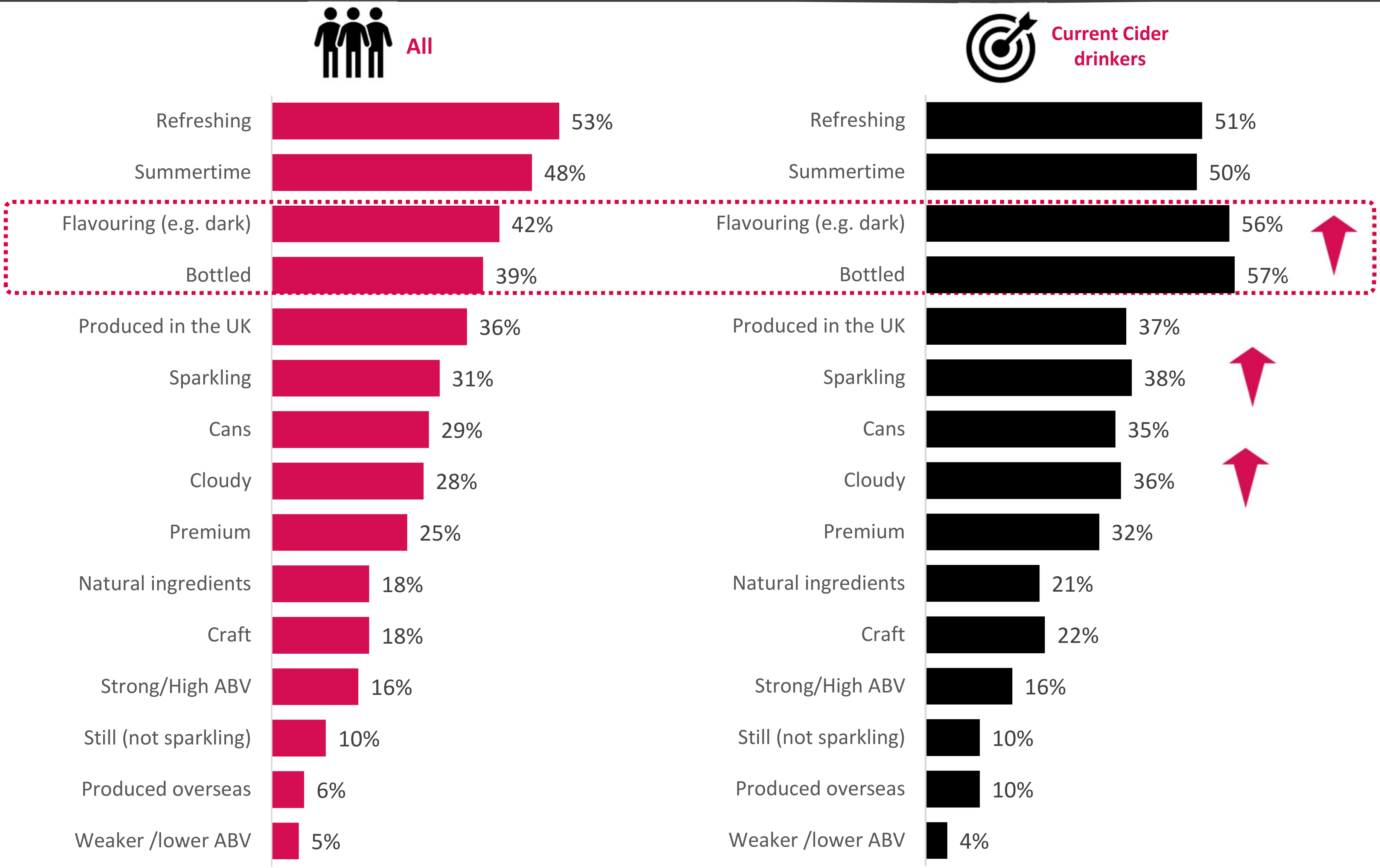
Cider attributes

	**Refreshing**	**53%**
	**Summer time**	**48%**
	**Flavouring**	**42%**



Q3. Focusing now solely on Cider, which words or phrases do you associate with this drink type?
(Please code all that apply to you if you were considering which brand of cider to choose in-store) Base: 302

Cider attributes



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Q3. Focusing now solely on Cider, which words or phrases do you associate with this drink type?
(Please code all that apply to you if you were considering which brand of cider to choose in-store) Base: 302

Cider attributes

		Male	Female	18-34 yrs	35-54 yrs	55 yrs and over
Refreshing	53%	51%	55%	42%	60%	59%
Summertime	48%	39%	56%	46%	49%	49%
Flavouring (e.g. dark)	42%	34%	50%	42%	50%	34%
Bottled	39%	39%	40%	38%	42%	38%
Produced in the UK	36%	42%	30%	26%	39%	44%
Sparkling	31%	34%	27%	22%	35%	37%
Cans	29%	28%	30%	32%	32%	22%
Cloudy	28%	32%	24%	25%	29%	30%
Premium	25%	29%	21%	24%	26%	23%

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Q3. Focusing now solely on Cider, which words or phrases do you associate with this drink type?
(Please code all that apply to you if you were considering which brand of cider to choose in-store) Base: 302

Premium associations with Cider

25% Overall

Premium association

Male	Female	18-34 yrs	35-54 yrs	55 yrs and over
29%	21%	24%	26%	23%

Current drinkers in that category **32%** (compared with 20% not currently in the category)

16% Overall

Strong (ABV) association

Male	Female	18-34 yrs	35-54 yrs	55 yrs and over
23%	9%	9%	20%	20%

18% Overall

Natural / Organic association

Male	Female	18-34 yrs	35-54 yrs	55 yrs and over
17%	19%	9%	26%	21%

Q3. Focusing now solely on Cider, which words or phrases do you associate with this drink type?
(Please code all that apply to you if you were considering which brand of cider to choose in-store) Base: 302

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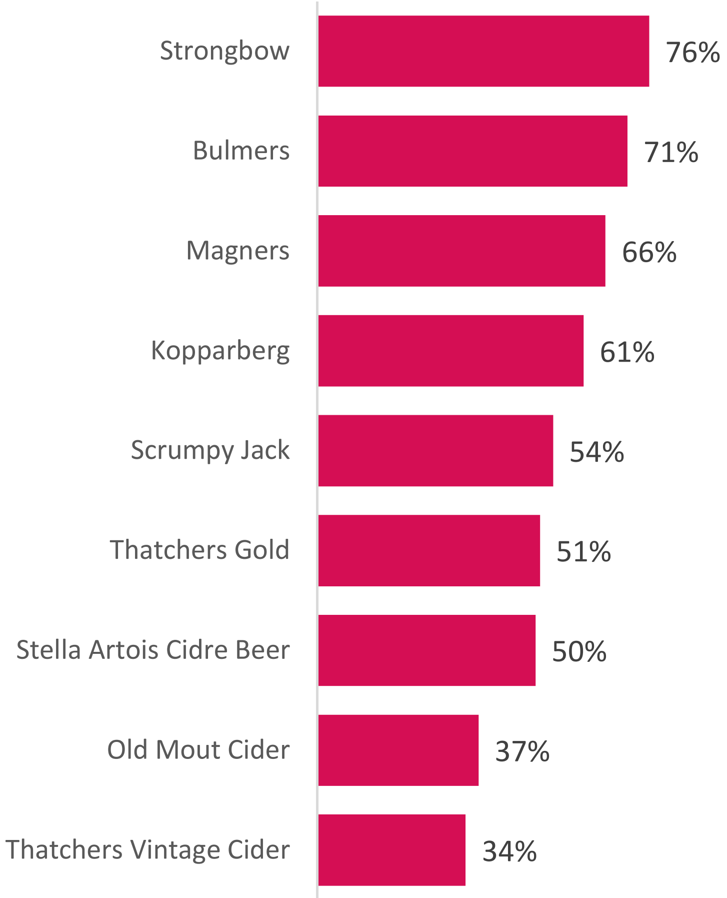
Brands & formats

Brands consumed in the home (top 5)

Strongbow	Bulmers	Magners	Kopparberg	Scrumpy Jack
76%	71%	66%	61%	54%

Q5. Which of the following Ciders have you drunk in the home in the past month, if any? Base: 302

Brands consumed in the home



	Male	Female	18-34 yrs	35-54 yrs	55 yrs and over
Strongbow	81%	71%	62%	79%	90%
Bulmers	73%	70%	53%	78%	88%
Magners	68%	64%	49%	74%	77%
Kopparberg	58%	64%	60%	69%	53%
Scrumpy Jack	61%	48%	35%	63%	69%
Thatchers Gold	54%	48%	37%	58%	61%
Stella Artois Cidre Beer	55%	46%	43%	58%	51%
Old Mout Cider	32%	43%	42%	45%	23%
Thatchers Vintage Cider	39%	30%	29%	35%	40%

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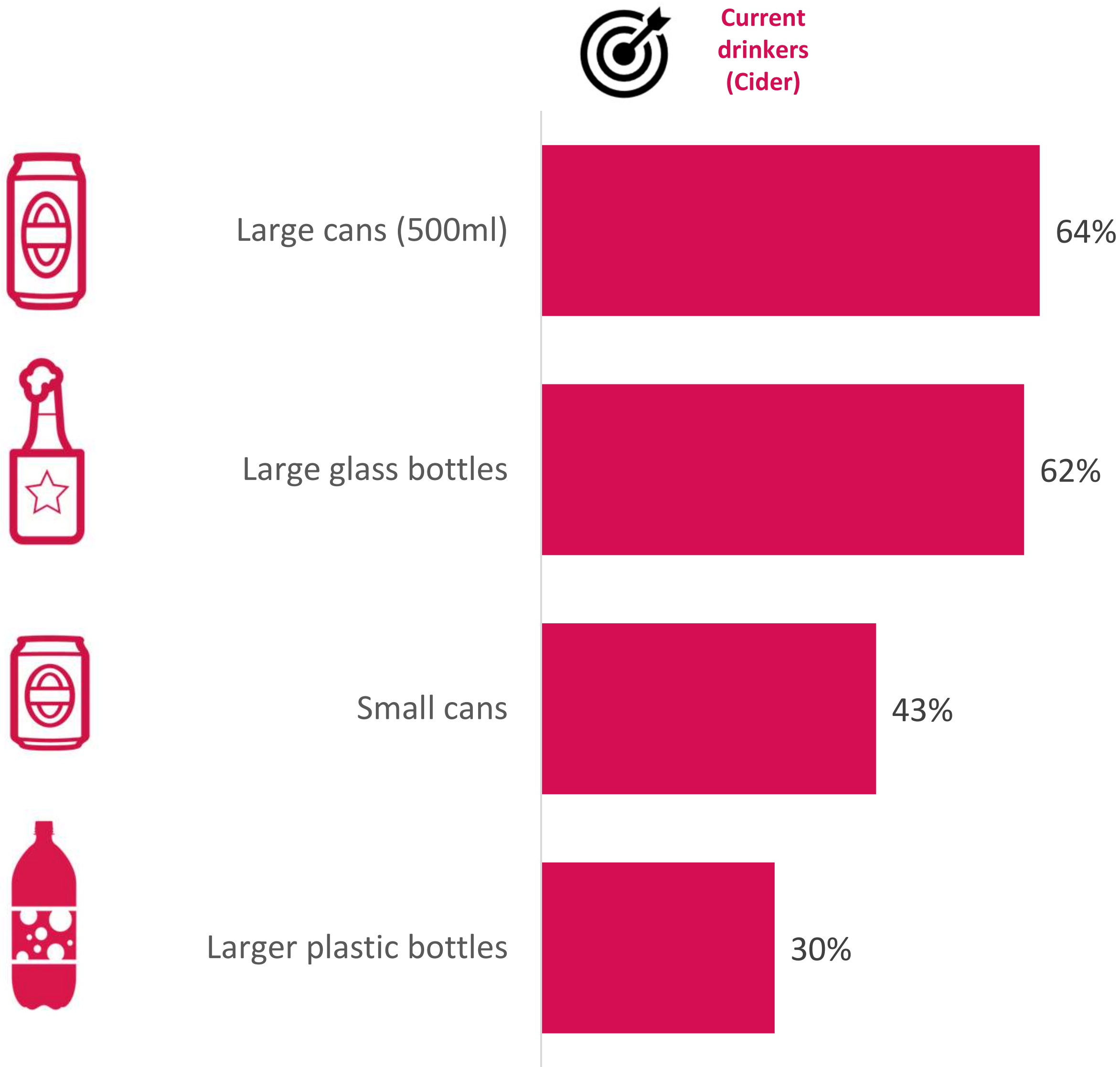
Q5. Which of the following Ciders have you drunk in the home in the past month, if any? Base: 302

Format expectations



Q4. In what formats do you expect Cider to be available in-store (e.g. in the supermarket)? Base: 302

Format expectations

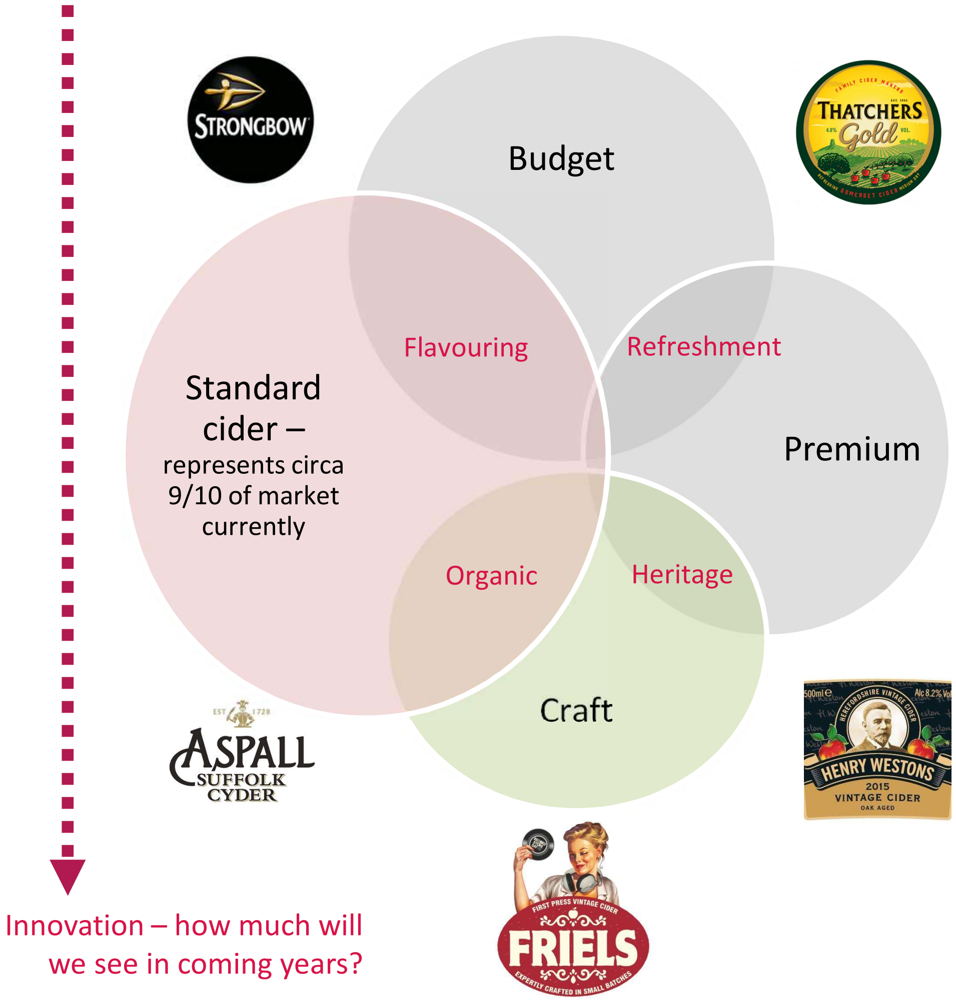
	Male (n=146)	Female (n=156)	18-34 yrs (n=112)	35-54 yrs (n=100)	55 yrs and over (n=90)
Large cans (500ml)	63%	60%	61%	57%	68%
Large glass bottle	60%	56%	47%	60%	68%
Small cans	47%	47%	50%	48%	41%
Large plastic bottles	36%	30%	12%	42%	49%

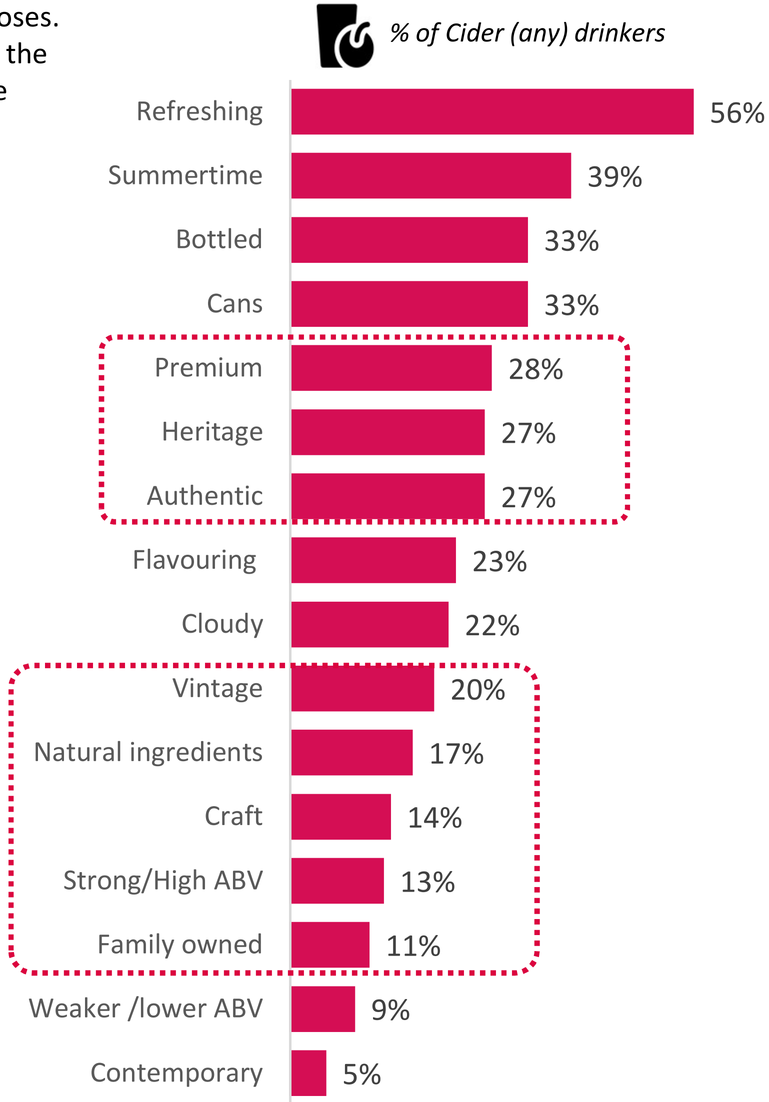
Smaller canned formats appear to be becoming a more popular choice with the younger cohort

Q4. In what formats do you expect Cider to be available in-store (e.g. in the supermarket)?

Summary: the evolving category 'map' of cider

Ultimately, we don't believe that the Cider drinker is defined solely by what he/she chooses. Although it is the older/male drinker who probably over-indexes on the vintage side of the category, a younger cohort are now also looking for a different premium experience



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About Eureka!

Launched in 2016

Seeking to make a difference and stand apart from the typical 'beige' market research agencies

Insight & tools

No passing work to inexperienced juniors, between us we have the skills and experience to build the appropriate robust technical solutions

Fluid and adaptable

We're adaptable too, if we need to change direction, we'll discuss this with you and get your buy-in in advance

Team capacity

With a trusted team of four associates who we use to expand our capacity and delivery

Innovation not products

We do not sell products, we design studies to solve your business challenges, working in partnership and evolving the scope to exceed your expectations

Quality underpinned

MRS™ Awards 2018
Finalist
Breakthrough
Business of the Year

We follow the Market Research Society (MRS) Code of Conduct and are an active member of the Company Partner network – giving our clients complete peace of mind

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Richard & Dave (co-founders of **Eureka! Research**) focus on consumer sectors that are experiencing a high level of disruption, such as the beer and snacking category.

Between us we have over 40 years of market research experience, and were recently shortlisted as a MRS Breakthrough Agency.

We use both traditional and cutting-edge research methodologies to get closer to what consumers, the trade and other stakeholders think about the market and new products.

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