CASE STUDY: Quantifying the Value of Circular Packaging

Unlocking Consumer Willingness-to-Pay for Sustainable Glass Packaging

To understand how wine consumers perceive sustainable packaging, we conducted a targeted Contingent Valuation (CV) survey of 65 verified wine drinkers. The data reveals a powerful market reality: consumers are not only ready for sustainable packaging, but they are willing to pay a premium for it.

These local findings align directly with global market research. According to **Trivium Packaging's Buying Green Report**, 82% of global consumers express a willingness-to-pay (WTP) more for sustainable packaging. Furthermore, **McKinsey & Company's 2025 Global Packaging Report** confirms that higher-income and younger consumers consistently lead this eco-premium trend, while **Oceana** reports that 87% of shoppers actively demand reduced packaging waste and circular choices from brands. By combining consumer feedback with global market trends, wineries can capture market demand by partnering with Revino's standardized reusable bottle ecosystem.

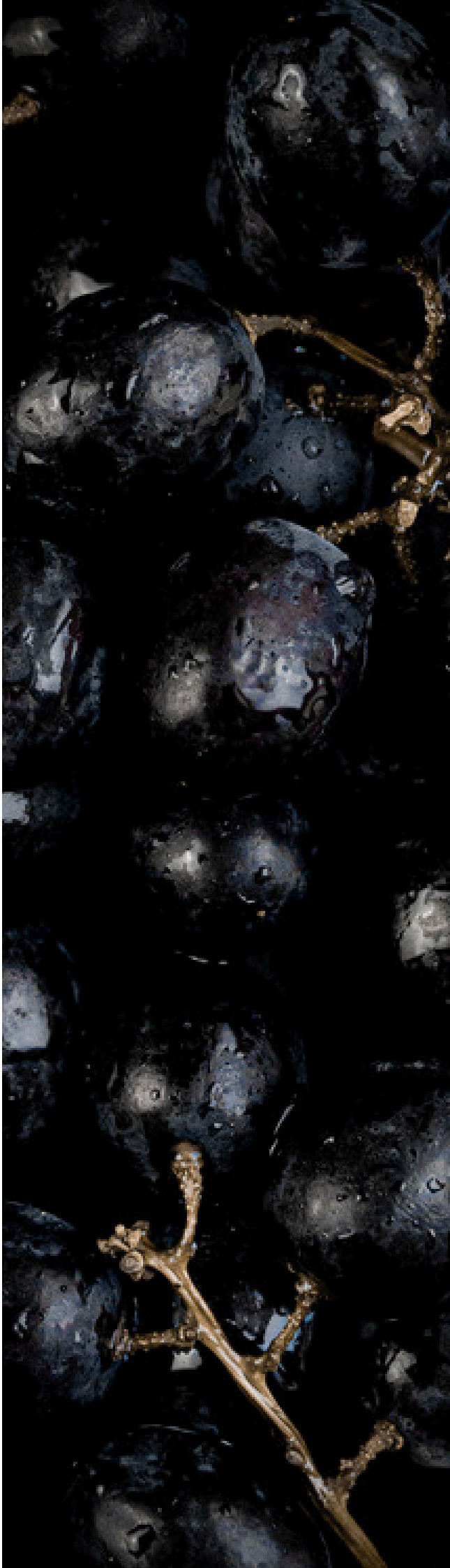


In the wine industry, packaging and single-use glass often represent the single largest contributor to a producer's carbon emissions. While sustainability-minded producers recognize the environmental need to shift to circular packaging, commercial adoption requires clear market proof. Wineries face persistent questions about consumer acceptance: Will buyers absorb eco-friendly packaging shifts? Do they perceive sustainable alternatives as lower quality? Does environmental awareness translate to point-of-sale purchasing decisions?

The challenge was to capture empirical consumer willingness-to-pay (WTP) data and demonstrate that switching to reusable glass preserves premium brand positioning while capturing added retail value.

By surveying verified wine consumers using a $15.00 base price payment ladder, Revino quantified consumer WTP, mapped quality perceptions, and identified key behavioral drivers to validate the commercial viability of returnable glass.

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The Challenge: Navigating Quality Perception and the Consumer Action Gap

Survey Demographics & Respondent Profile

Metric	Performance Data (August 2026)
Total Sample Size	65 verified wine consumers
Demographics	57% Male, 38% Female, 5% Non-binary/Other; 77% aged 21–45 (40% prime earning age 36–45)
Household Income	60% earn >$100k/year (43% earn >$150k/year)
Consumption Frequency	72% drink wine weekly (29% drink 4–6 times per week)
Monthly Wine Budget	45% spend over $100/month; 23% spend $50–$100/month
Drinking Location	51% drink primarily at home; 45% split between home and dining out

Macro Demographic Alignment: McKinsey's global data shows that willingness-to-pay for sustainable packaging is highest among prime-earning age demographics (Gen Z and Millennials) and high-income households—matching the exact demographic profile of core, high-frequency wine buyers captured in Revino's survey sample.

Unlike alternative packaging formats (boxes, pouches, aluminum) that suffer from noteworthy quality perception and material compatibility penalties, reusable glass meets core wine buyers exactly where they are—combining sustainability with premium heritage.

Consumer Perception: High Glass Loyalty Meets WTP

The survey yields a definitive insight into consumer preference: traditional glass remains the absolute baseline for quality, making returnable glass the ideal strategic format.

- **The Glass Mandate:** Respondents overwhelmingly identified glass bottles as the most appropriate container for wine **(4.18 / 5.00)**, while agreeing that alternative packaging formats evoke a lower-quality product **(3.58 / 5.00)**. This mirrors **McKinsey's 2025 Global Survey**, where glass consistently ranked at the top of global consumer perceptions for substrate sustainability and quality.

- **The Attitude-Behavior Gap:** Respondents scored high on general eco-conscious habits, such as actively trying to reduce daily packaging waste **(3.91 / 5.00)**. This reflects **Trivium Packaging's** finding that 71% of consumers identify as environmentally aware and 63% look for recyclability info. However, in Revino's study, this daily intent drops when evaluating environmental impact directly at point-of-purchase **(3.17 / 5.00)**. Consumers want to make sustainable choices, but they hesitate without full understanding of the product's sustainability claims or when forced to compromise on format or perceived quality.

- **Overcoming Friction:** The primary barriers cited for sustainable purchasing were price sensitivity (~55%) and skepticism about environmental claims (~23%). As **Oceana's** research demonstrates, 86% of consumers are deeply concerned about packaging waste but lack seamless, trustworthy options at checkout. Reusable glass directly resolves both friction points: it maintains standard bottle aesthetics while offering transparent, verifiable carbon reduction.

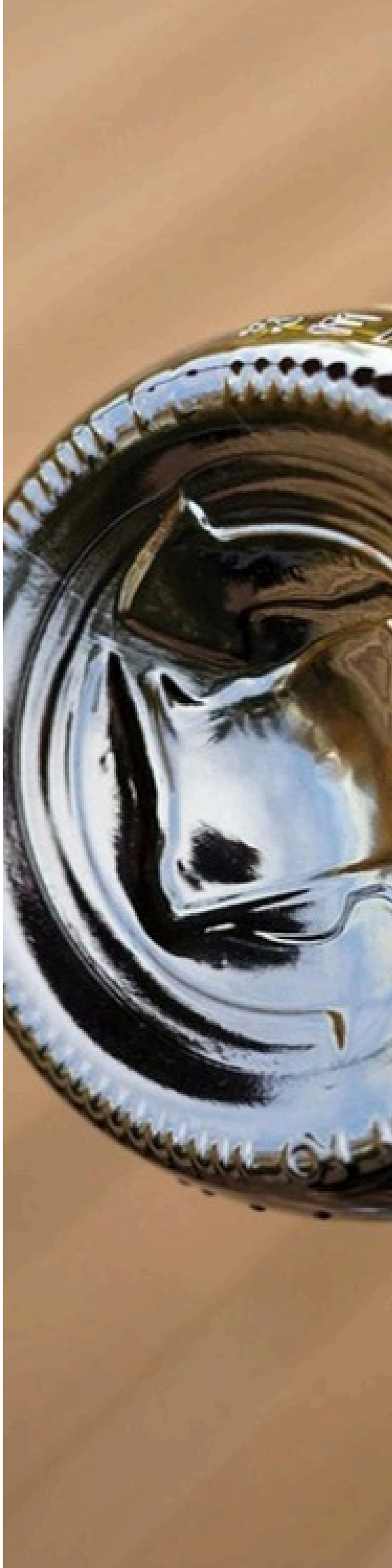


WTP Metrics: Capturing Premium Value

Revino's survey tested 65 consumers' willingness-to-pay an eco-premium above a standard $15.00 base bottle price:

- **Non-Payers:** 15.4% (10 respondents) will not pay above the $15.00 base price.
- **Modest Premium:** 27.7% (18 respondents) will pay a +$1.00 premium ($16.00 bottle price).
- **High Premium:** 56.9% (37 respondents) will pay a +$2.50 premium ($17.50 bottle price).
- **Total Eco-Willingness:** **84.6%** of consumers are willing to pay at least $1.00 more per bottle for eco-friendly packaging.
- **Lower Mean WTP:** Using conservative lower-bound values at each tier, the average consumer willingness to pay is **+$1.70** above base price.

Industry Benchmark Alignment: Revino's **84.6%** total eco-willingness closely mirrors **Trivium Packaging's** global finding of **82%** willingness-to-pay for eco-friendly packaging, confirming that local wine consumer behavior reflects a broader, macro-level shift across consumer goods.



Market Response & Consumer Mindset

The data makes a strong case for eco-friendly packaging at a modest premium. High-spending, frequent wine drinkers are the most likely to resist alternative formats like cans or boxes, but they are highly receptive to paying a premium within the glass bottle category. Standardized reusable glass removes the barrier by keeping the premium bottle format identical while delivering a verified reduction in waste.

Global research from McKinsey and Trivium further emphasizes that consumers hold brand owners directly responsible for driving packaging circularity. When brands provide circular systems without compromising product quality, consumers willingly reward them at the register.

The Revino Perspective: Reusable Glass as the Commercial Sweet Spot

The WTP survey proves that eco-friendly packaging is not a cost burden or marketing compromise; it's a value driver. By adopting standardized reusable glass, wineries can comfortably pass through transition costs or capture incremental margin while strengthening brand trust among high-value consumers and improving the industry's local bottle supply economy.

Most importantly, returnable glass overcomes greenwashing skepticism. Because the bottle itself is physically collected, washed, and refilled within a regional ecosystem, consumers participate in a tangible closed-loop story rather than an abstract environmental claim.

- **Unlocking Revenue Potential:** With 84.6% of buyers willing to pay an average lower-bound premium of +$1.00 per bottle (aligned with Trivium's 82% global benchmark), eco-friendly packaging represents a clear margin-expansion opportunity for premium brands.

- **Preserving Equity:** Because consumers strongly tie wine quality to glass (4.18 / 5.00) and global surveys (McKinsey) rank glass at the top of sustainable packaging substrates, standardized reusable glass avoids the brand dilution and friction that can be associated with alternative packaging formats.

- **Targeting High-Value Regulars:** High-frequency (72% weekly drinkers) and high-income (43% >$150k) consumers are the most willing to support sustainable packaging (McKinsey), provided it remains in glass and reduces single-use waste (Oceana).

By aligning consumer demand with Revino's scalable washing infrastructure, wineries turn sustainable packaging into a measurable commercial advantage.



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References & Further Reading

Trivium Packaging & Euromonitor International.
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Opting Out: Amazon Shoppers Would Choose Plastic-Free Packaging If They Had a Choice.
https://oceana.org/blog/opting-out-amazon-shoppers-would-choose-plastic-free-packaging-if-they-had-choice/
Polling analysis highlighting consumer demand for plastic reduction, transparency in packaging, and interest in circular options.

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Sustainability in Packaging 2025: Inside the Minds of Global Consumers.
https://www.mckinsey.com/industries/packaging-and-paper/our-insights/sustainability-in-packaging-2025-inside-the-minds-of-global-consumers
Global multi-country survey analyzing consumer substrate preferences, recyclability perceptions, and willingness-to-pay dynamics across income and age demographics.