

Report Brochure



SPARKLING WINE IN THE AUSTRALIAN MARKET



OCTOBER 2014



REPORT PRICE: • AUD 2,775 or 3 Report Credits

Contents page



1. Introduction	p.4	5. Who drinks sparkling wine?	p.28
2. Management summary	p.6	▪ Profiling of sparkling wine drinkers	
3. Sparkling wine market context	p.11	▪ Profiling of sparkling drinkers by type of sparkling wine	
▪ Australian sparkling market volume data (IWSR)		6. Sparkling brand health	p.37
▪ Number of sparkling wine drinkers		▪ Brand awareness	
4. Sparkling wine consumer trends	p.16	▪ Brand reach	
▪ Sparkling wine vs. other alcoholic drinks categories:		▪ Brand conversion	
▪ Frequency of consumption tracking		▪ Brand recommendation	
▪ Imagery tracking		▪ Brand power	
▪ Preferred drink by occasion		▪ Most frequently purchased brands	
▪ Sparkling wine types frequency of consumption tracking:		▪ Profiling of top 10 sparkling brands	
▪ Domestic sparkling		7. Appendix	p.50
▪ French Champagne		▪ Portraits segmentation overview	
▪ Sparkling wine from New Zealand		▪ Methodology	
▪ Prosecco			
▪ Cava			

Excerpts from the introduction



“At a quick glance, the sparkling wine market in Australia looks bright, being the 9th largest sparkling wine market globally (in terms of volume). An impressive statistic when taking into account the relatively small Australian population.”

“About half of all alcohol drinkers in Australia drink sparkling wine, making Australia a market of around 8.3 million sparkling wine drinkers, of which 1 in 5 are enjoying fizz on a weekly basis.”

“Domestic volumes started to show signs of decline again last year, after a slight increase in 2012 that bucked a longer term decline in domestic sparkling volumes.”

“Meanwhile, Champagne and, to a lesser degree, Italian sparkling wines are still growing. New Zealand, and Spain from a small base, even grew last year, despite showing longer term decline”.

“When we examine year-on-year behaviour within the sparkling wine category, most of the measures remain quite stable. The category is attracting the same number of drinkers as a year ago and they are enjoying fizz at a similar frequency and sticking to similar sparkling brands.”

Natasha Rastegar,
Country Manager,
Australia and New Zealand



Report price



Report price:

AUD 2,775
 GBP 1,500
 USD 2,475
 EUR 1,800

Report credits:
 3

55 page
 PowerPoint
 report

Management summary: Sparkling drinker profiles – by type of sparkling wine

Key differences between different types of sparkling wine drinkers

- Cava and Prosecco drinkers are typically savvy and experimental consumers:
 - They frequent consumers of a range of sparkling wines
 - They are most often members of the involved wine consumer segments – **Adventurous Connoisseurs and Developing drinkers***
- Cava drinkers specifically are equally men and women and tend to be younger than drinkers of other types of sparkling wine (51% under 25yrs)
- Prosecco is also enjoyed by both men and women and younger drinkers, but not to the same extent as Cava

Developing Drinkers* are younger, interested consumers who seek information about wine to increase their confidence in the category

Adventurous Connoisseurs* are higher spending, knowledgeable wine drinkers with a genuine interest to explore the category

Australian sparkling wine, French Champagne and New Zealand sparkling wines reach a broader base of consumers, b reflective of the general wine drinking population

Sparkling wine drinker profile

Who are sparkling drinkers?

Consistent profile to 2013:

- Mostly women
- Broad set of ages
- Mid to high income earners
- Most are regular wine drinkers: 82% drink still wine at least once a month
- More likely to be drinking Rosé / Pink Champagne than last year

Gender	Share
Female	63%
Male	39%

Age	Share
18-24	17%
25-34	31%
35-44	21%
45-54	19%
55-64	8%
65 and over	4%

No significant differences in age or gender since 2013

Top 10 alcoholic beverages for sparkling drinkers	2013	2014
White wine	83%	83%
Champagne	80%	79%
Red wine	74%	69%
Beer	56%	55%
Vodka/Gin	50%	50%
Other sparkling wine*	46%	47%
Cider	43%	46%
Liqueurs	43%	43%
Rosé/pink Champagne	29%	40%
Road wine	45%	37%

*Not available for Cava which were unable to separate cava in this question

Statistically significantly higher than April 2013 at a 95% confidence level
 * Statistically significantly lower than April 2013 at a 95% confidence level
 Source: Wine Intelligence, Vintrac® Australia, August 2014 n=1,522 & August 2013 n=3,469 Australian alcohol drinkers



Research methodology:

Sampling and quotas used for Vinitrac® Australia



- The data for this study was collected in August 2013 and August 2014
- Data was gathered via Wine Intelligence's Vinitrac® online survey of Australian all alcohol drinkers and sparkling wine drinkers:
 - 2013 - 2,469 all alcohol drinkers and 1,255 sparkling wine drinkers.
 - 2014 - 1,522 all alcohol drinkers and 739 sparkling wine drinkers
- Respondents meet the following requirements:
 - Adult drinking age
 - Permanent resident of the country
 - Drink sparkling wine (for sparkling wine category)
- Invalid respondents (those who sped through the survey or gave inconsistent answers to selected questions) were removed before analysis
- The survey was quota-based and post-weighted to be representative of Australian sparkling wine drinkers in terms of age and gender



Quantitative

- Data collection:
 - The data for this report was collected in April, October 2011, May 2012 and March, April 2014
 - Data was gathered via Wine Intelligence's Vinitrac® Australia online survey and is representative of all Australian regular wine drinkers
 - Sampling: quotas / stratified
- Screening criteria:
 - Respondents were required to drink wine at least twice per month, to drink at least red, white or rosé wine and to buy wine in the off-trade and/or in the on-trade
- Data processing:
 - Invalid responses (those who completed the survey too quickly, or who "straight-lined" through selected questions) were removed from the sample
 - The survey was post-weighted in terms of age and gender
- Sample distribution:
 - The distribution of the sample is shown in the table

Qualitative

- Focus groups and in-depth interview were collected to support this study in April 2014, in Sydney and Melbourne
 - 4 x 1hr focus groups with Developing Drinkers, Mainstream Bargain Hunters, Contented Casuals, Newbies
 - 4 x in-depths with Adventurous Connoisseurs



- Measures from the IWSR correspond to actual wine consumption figures. This means sales into the trade (on + off premise)
- The IWSR visits each market each year. Discussions are held with key local experts in the market including importers, producers, grey market operators, duty free operators, and supermarket/hypermarket buyers.
- All volume data is given in thousand 9 Litre Cases
- In the breakdown by country of origin, IWSR includes (depending on the market and the size of the category) the following two categories: 'Other' and 'International'
They are defined as followed:
 - 'Other': category including wine blends (normally in bulk or bottled without specified country of origin) and wines from other countries with volumes too small to break out separately
 - 'International': Category including wine brands that have wines from various countries
- The IWSR includes the following types of wine in its definition of 'wine':

Definitions

WINE =

Still light wine +
Sparkling (Champagne & other) +
Fortified +
Light aperitifs (vermouth...) +
Other (rice wines...)

} Sub-categories





For more information about Wine Intelligence please contact us:

UK Office:

Wine Intelligence

109 Maltings Place

169 Tower Bridge Road

London

SE1 3LJ

Telephone: +44 (0)20 7378 1277

Australia Office:

Wine Intelligence

Level 5

11 Queens Road

Melbourne

VIC 3004

Telephone: +61 (03) 9869 7155

Email: reports-shop@wineintelligence.com

Web: www.wineintelligence.com

Twitter: <http://twitter.com/wineintell>

Facebook: <http://www.facebook.com/wineintelligence>