

Report Brochure



THE AUSTRALIA WINE MARKET LANDSCAPE REPORT

AUGUST 2016



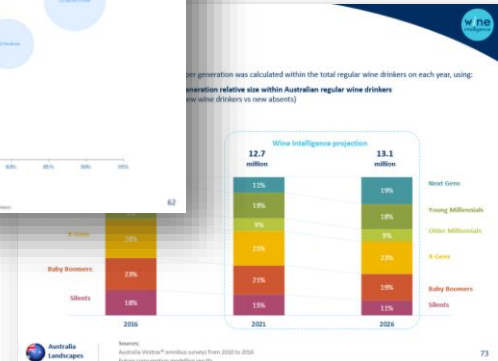
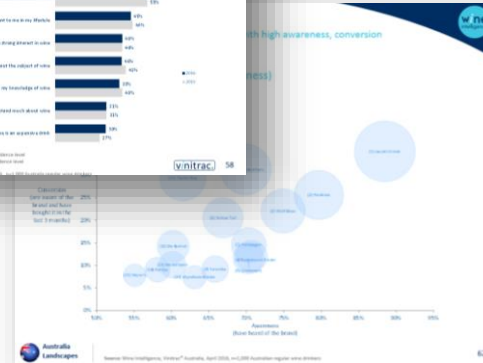
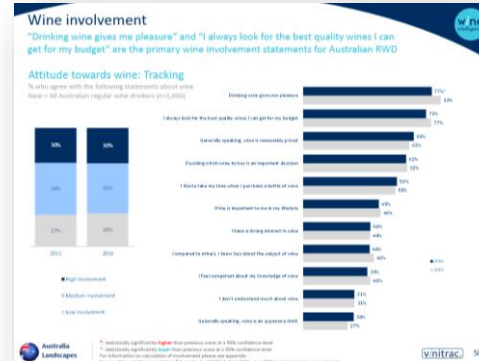
Report price

Report price:
AUD 4,750
GBP 2,500
USD 3,500
EUR 3,250
Report credits:
5

Price also includes
**supporting data in
Excel**

(All Vinitrac® questions with
cross-tabulations by
gender, age, states,
Portraits segmentation,
varietals and typical on-
premise and off-premise
spend)

84 page
PowerPoint
report



Excerpts from the introduction



‘The 10th largest wine country in the world, and ranked as the 12th most attractive in our recently released Compass 2016-17 report, Australia continues to display all the hallmarks of an established wine nation. Wine may be embedded in the culture of the country, however per capita consumption continues to fall (26.08 litres/per head/per annum in 2015 compared to 26.49 in 2014 – according to IWSR data). Yet, when they do choose to enjoy a glass, Australians are opting for a wider selection of wines than ever before.’

‘This diversification can be tracked across the spectrum of the most important choice cues. Australian wine drinkers are still indicating that brand awareness and grape varietal are the most important choice cues, however since 2012 we can see that region and country of origin are becoming more of an influence when consumers are buying wine. Continuing on from this, varietals like Sangiovese and Malbec have shown growth, another indicator that more Australians are starting to look further afield than our own backyard.’

‘It’s no surprise, then, that IWSR data demonstrates that the volume of imported wine (still light and sparkling) into Australia has increased since 2011, whilst their domestic equivalents have fallen.’

‘It’s not all doom and gloom for domestic wines however. They still make up a very dominant 83% of the Australian wine market volumes and the increase in importance and awareness of regionality can be applied in a domestic context. Australia offers an incredibly diverse wine producing landscape, so there is ample opportunity to continue to emphasise the USP of each region.’

‘To accompany our in-depth look at the Australian wine landscape in 2016, we’ve fast-forwarded through the years in this report and included a series of projections on the future Australian consumer. For a small nation, Australians are some of the most involved in the world in the wine category, with the younger generations looking to spend more per capita than their older counterparts in the next 10 years.’

Contents



■ Introduction	p. 6	■ Wine involvement and attitude	p. 56
■ Management summary	p. 9	Wine attitude	
■ Australian wine market overview	p. 18	Wine involvement	
Imported vs. domestic wine market share		Attitudes towards closures	
Per capita consumption of still light wine		■ Brand health	p. 61
■ Australian wine consumers	p. 23	Brand power	
Overview of the Australian wine market		Brand awareness	
Demographics of Australian regular wine drinkers		Brand purchase	
Wine consumption frequency		Brand affinity	
■ Beverage repertoire	p. 27	Brand recommendation	
Alcoholic beverage repertoire		■ Future consumers	p. 70
Varietal consumption		Generations overview	
Country of origin consumption		Future consumption	
Region of origin awareness		■ Methodology	p. 81
Region of origin purchase			
Region of origin conversion			
■ Wine buying behaviour	p. 38		
Channel usage			
Retailer usage			
Choice cues			
■ Wine consumption in the off-premise and in the on-premise	p. 48		
Off-premise consumption frequency by occasion			
Off-premise spend by occasion			
On-premise consumption frequency by occasion			
On-premise spend by occasion			
Threats to wine consumption			

- The data for this survey was collected in Australia in 2012, 2015 and 2016
- Data was gathered via Wine Intelligence's Vinitrac® online survey:
 - 1,505 Australian regular wine drinkers (2012)
 - 1,000 Australian regular wine drinkers (2015)
 - 1,000 Australian regular wine drinkers (2016)
- Respondents were screened to ensure that they drink wine at least once a month; drink red, white or rosé wine; and buy wine in the off-premise or in the on-premise
- Invalid respondents (those who sped through the survey or gave inconsistent answers to selected questions) were removed before analysis
- The data is representative of Australian regular wine drinkers in terms of age, gender and city / region of residence

How does Vinitrac® work?

1) Defining the right samples: how many wine drinkers are there in each market?

- Wine Intelligence, with the support of global research companies (e.g. TNS, YouGov), regularly runs calibration studies in each market among all adults in order to define demographic specifications of the wine consumers and the size of the market (i.e. penetration of wine consumption)

2) Running the online survey: Targeting the right consumers

- Invitations to participate in an online survey programmed by Wine Intelligence are then distributed to residents in each market
- Respondents are directed to a URL address, which provides access to the online survey
- Based on given criteria (e.g. age, beverage, frequency of wine consumption) respondents will either proceed or screen out of the survey
- Wine Intelligence monitors completed responses to build samples representative of the target markets' wine drinking population based on the most recent calibration study

3) Cleaning the data: Achieving a valid sample

- When a representative sample is logged, the survey is closed
- Wine Intelligence will then clean out all invalid data points (e.g. those who sped through the survey or gave inconsistent answers to selected questions) and weight the data in order to ensure representability

REPORT PRICE: • AUD 4,750 • GBP 2,500 • USD 3,500 • EUR 3,250 • 5 Report Credits

Format: 84 page PowerPoint (PDF) + supporting data table (Excel)

Purchase online: <http://www.wineintelligence.com/product-category/report-type/wine-landscape-reports/>

Contact us directly: reports-shop@wineintelligence.com

If you have any questions, please contact your local Wine Intelligence office:

AVIGNON

Jean-Philippe Perrouy, Director, Wine Intelligence France | T +33 (0)486 408 417 | Email: jean-philippe@wineintelligence.com

CAPE TOWN

Dimitri Coutras, South Africa Country Manager | T +27 828288866 | Email: dcoutras@iafrica.com

DELAWARE

Erica Donoho, USA Country Manager | T +1 973 699 4158 | Email: erica@wineintelligence.com

FRANKFURT

Wilhelm Lerner, Associate Director/Germany Country Manager | T +49 (0)175 5806 151 | Email: wilhelm@wineintelligence.com

LONDON

Eleanor Hickey, Business Manager | T +44 020 7378 1277 | Email: eleanor@wineintelligence.com

SYDNEY

Liz Lee, Australia Country Manager | T +61 (0) 416 638 272 | Email: liz@wineintelligence.com

TRIESTE

Pierpaolo Penco, Italy Country Manager | T +39 349 424 3371 | Email: pierpaolo@wineintelligence.com