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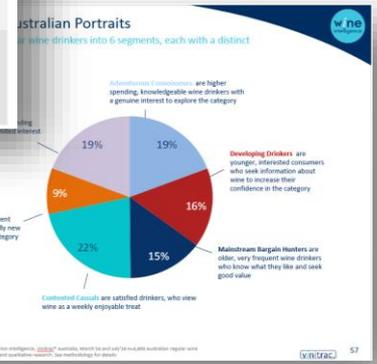
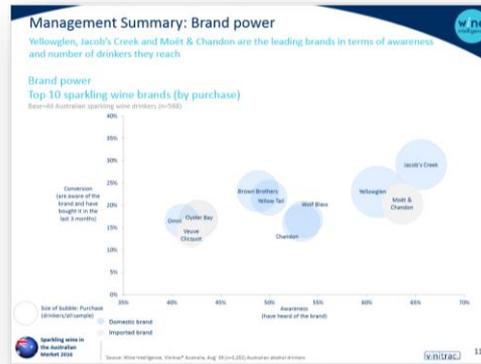
SPARKLING WINE IN THE AUSTRALIAN MARKET



SEPTEMBER 2016



Report price



Report price:
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GBP 1,500
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3

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report

Excerpts from the introduction

‘Australia is now the 9th largest sparkling wine market in the world in terms of volume, with just under half (45%) of Australian adults drinking sparkling wine.’

‘Despite a static market in terms of volume, there has been a long term increase in the number of drinkers consuming sparkling wine on a more frequent basis (2-5 times a week), suggesting a small but growing group who are adopting sparkling wine as more of an everyday choice. Sparkling wine is also not exclusively a female category, with 45% of Australian sparkling wine drinkers being men, whilst only Cava has a gender bias – with significantly more men than women consuming it.’

‘There’s good news for both imported and domestic sparkling wine producers. We have seen both short and long term growth of imported sparkling wine volumes in Australia, especially from France, Italy and Germany. On the domestic front, the positive news for producers is that alongside being the largest sub-category in terms of volume, domestic sparkling wine has the highest perception in terms of delivering value for money, supported by very strong quality perceptions. Turning to Prosecco, and the potentially sensitive topic of Italian versus Australian Prosecco, Australian drinkers have higher quality associations with Italian Prosecco over Australian Prosecco. However, they both have the same number of drinkers, reaching two thirds of sparkling wine drinkers. When we look beyond Champagne and France, the top regions in the world for Australian sparkling wine drinkers to associate with sparkling wine, Barossa Valley is most strongly associated in the minds of consumers with producing sparkling wine.’

‘We have also witnessed some movement in how sparkling wine brands are performing with Australian drinkers. Moët & Chandon and Brown Brothers outperform competitors in terms of being the favourite sparkling brand, when consumers are prompted with key sparkling wine brands. However, Yellowglen and Jacob’s Creek are named as favourite sparkling wine brands when they are asked to recall brands unprompted. Yellow Tail ‘Bubbles’ has shown a strong performance, but on a number of measures, Yellowglen is showing a decline in performance from a consumer perspective.’



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Research methodology:

Sampling and quotas used for Vinitrac® Australia



- The data for this study was collected in August 2013, August 2015 and July 2016
- 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
 - 2015 – 1,201 all alcohol drinkers and 621 sparkling wine drinkers
 - 2016 – 1,202 all alcohol drinkers and 588 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



- 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

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