

# Wine Intelligence

## The Australian Wine Market Landscape Report 2011



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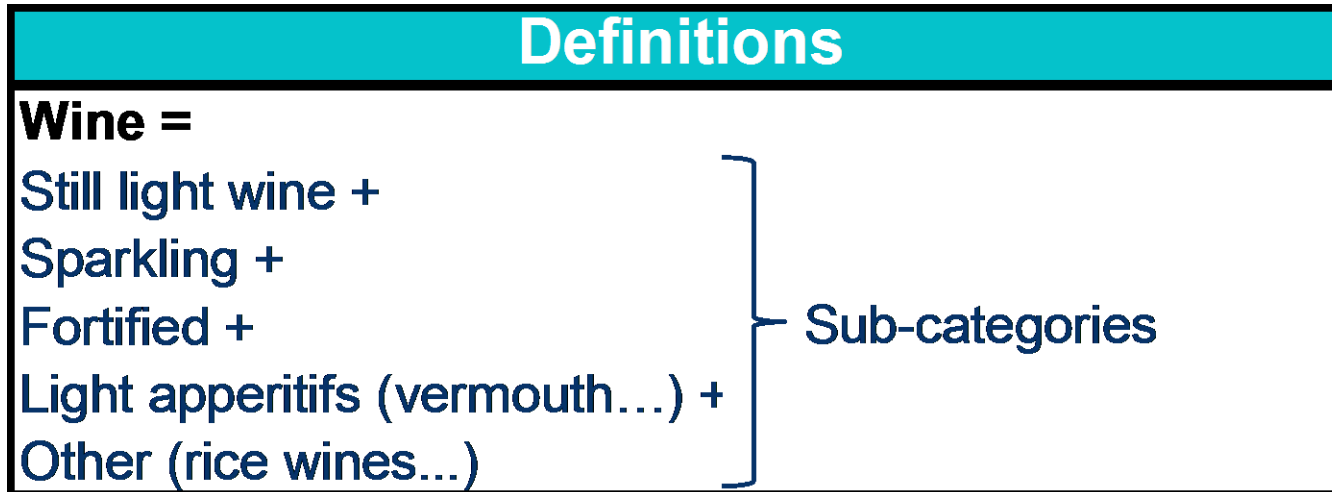
- Appendices

- Wine Intelligence Vinitrac® methodology



# IWSR methodology

- Measures in this section 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





# Vinitrac<sup>®</sup> methodology



## Vinitrac<sup>®</sup> sample size & methodology for this report:

- Adult drinking age
- Resident of the country
- Drinks wine at least once per month
- Drink at least red or white wine
- Buy wine in the off-premise and/or in the on-premise

Where adjustments are needed we weight the sample to ensure that we are representative of the 'regular' wine drinking population

Australian sample demographics  
October 2010

		n=	1,025
Gender	Male		50%
	Female		50%
	<b>Total</b>		<b>100%</b>
Age	18- 24		11%
	25 - 34		18%
	35 - 44		19%
	45 - 54		18%
	55 - 64		22%
	65 and over		12%
	<b>Total</b>		<b>100%</b>
State	New South Wales + Australian Capital Territory		33%
	Northern Territory		0%
	Queensland		18%
	South Australia		9%
	Tasmania		2%
	Victoria		27%
	Western Australia		11%
	<b>Total</b>		<b>100%</b>



# Vinitrac® methodology: online surveys

Sample sizes: At least 500 per survey; 1,000 in most countries, 2,000 in US  
Regular adult wine drinkers (where 'regular' = drinks wine at least once/month)


Each Vinitrac® survey starts with questions to screen respondents:

- Adult drinking age within each country
- Permanent resident of the country being surveyed
- Drinks wine at least once per month
- Drink at least red or white wine
- Buy wine in the off-premise and/or in the on-premise
- ... and rejects all respondents who do not fulfil these Vinitrac® criteria

We comply with both ESOMAR and MRS codes and guidelines for market research practice

Each sample is representative of the 'regular' wine drinking population in that market and is therefore valid; a sample size of at least 500 consumers ensures results are reliable...it's like a 'smaller' version of the wine drinking population at large





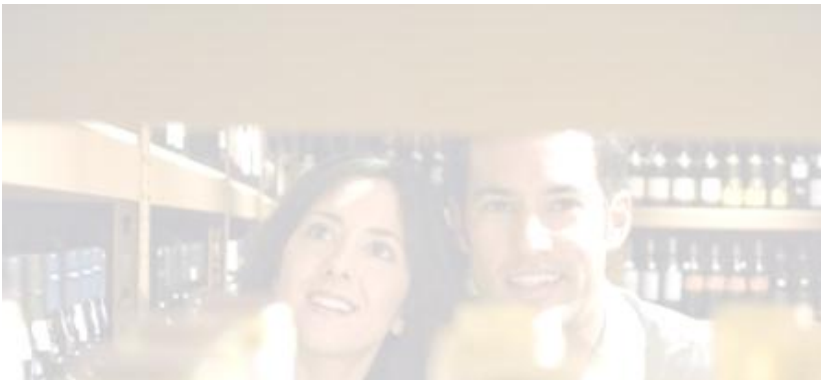
# Vinitrac<sup>®</sup> - how can it help you understand the wine consumers and their needs?

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Vinitrac<sup>®</sup> is the only global survey that monitors and tracks wine consumers' attitudes, behaviour and relationship with wine

Vinitrac<sup>®</sup> monitors every aspect of wine drinkers' wine lives - from what they drink, where they purchase to their attitude to wine brands and countries of origin...

...it even monitors what varietals they favour and what they think of different closures





# Frequently asked questions

## Why is Vinitrac® not a panel?

- Panels are good for monitoring detailed purchase activity but require regular input from the exactly the same complete group of respondents
- This requires more time from respondents for which they are paid and are therefore more heavily skewed towards home-based consumers e.g. students and home-makers
- This group of a country's wine drinking population does not fully represent the accurate weighted sample of adult regular wine drinkers on which Vinitrac® insights are based

## How does Vinitrac® work?

- Invitations to participate in Vinitrac® are distributed to adult consumers in each market
- Consumers interested in a wine survey are directed to an URL address, which welcomes them to the online survey
- Wine Intelligence monitors incoming completed responses to build a sample representative the wine drinking population of the target market
- When a representative sample of at least 1,000 (US: 2,000) is logged, the survey is closed



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