

Report Brochure



# THE NEW ZEALAND WINE MARKET LANDSCAPE REPORT

January 2016

REPORT PRICE • NZD 5,500 • AUD 5,250 • GBP 2,500 • USD 4,000 • EUR 3,500 • 5 Report Credits



# Report price

Report price:

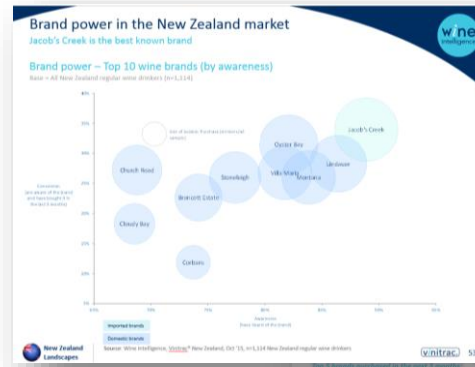
GBP 2,500  
AUD 5,250  
USD 4,000  
EUR 3,500

Report credits:  
5

Price also includes  
**supporting data in  
Excel**

(All Vinitrac® questions with  
cross-tabulations by  
gender, age, involvement,  
NZ regions, typical on/off-  
trade spend and household  
income)

82 page  
PowerPoint  
report



# Contents



■ Introduction	p. 4		
■ Management summary	p. 5		
■ New Zealand in the Wine Intelligence Compass model	p. 10		
New Zealand market attractiveness			
New Zealand market classification			
■ The New Zealand wine market	p. 17		
Imported vs. domestic wine market share			
Per capita consumption of still light wine			
■ New Zealand wine consumers	p. 21		
Overview of the New Zealand wine market			
Demographics of New Zealand regular wine drinkers			
Wine consumption frequency			
■ Beverage repertoire	p. 25		
Alcoholic beverage repertoire			
Varietals consumption			
Country of origin consumption			
Region of origin awareness			
Region of origin purchase			
■ Wine buying behaviour	p. 37		
Channel usage			
Retailer usage			
Choice cues			
		■ Wine consumption in the off-trade and in the on-trade	p. 43
		Off-trade consumption frequency by occasion	
		Off-trade spend by occasion	
		On-trade consumption frequency by occasion	
		On-trade spend by occasion	
		■ Wine involvement and attitude	p. 48
		Wine attitude	
		Wine involvement	
		Attitudes towards closures	
		■ Brand health	p. 52
		Brand power	
		Brand awareness	
		Brand conversion	
		Brand purchase	
		Brand affinity	
		Brand recommendation	
		■ Wine drinker profiling by age group	p. 64
		■ Wine drinker profiling by average off-trade spend	p. 71
		■ Methodology	p. 76

# Excerpts from the introduction



‘According to Wine Intelligence, 55% of the adult population in New Zealand drinks wine at least once a month, giving us a pool of 1.9 million ‘regular’ wine drinkers. Whilst this number is small in terms of number of drinkers, wine drinkers in New Zealand enjoy relatively high consumption volumes of wine and are important for both domestic producers, as well as an important market for producers around the world.’

‘The percentage of New Zealanders drinking wine on a regular basis has decreased, which makes the market slightly more difficult for wine producers targeting New Zealand. However, when looking at the alcoholic beverage repertoire long term trends, numbers of people who drink beer, pre-mixed drinks and a number of spirits have also dropped. With more competition than ever before, the data reflects a saturated market for a relatively small population.’

‘Nonetheless, there are some beverages and wine varieties that are showing growth, illustrating that niche categories are of interest to New Zealand regular wine drinkers. Italian Prosecco and Cava have grown in popularity over the last few years, with craft beer also on the rise in the past 12 months. Additionally, niche varieties such as Malbec, Tempranillo and Sangiovese are showing long term growth. Contrastingly, the most popular varieties for both reds and whites remain relatively stable, with New Zealand’s favourite, Sauvignon Blanc, decreasing in popularity in last few years.’

‘Our New Zealand Landscapes 2016 report brings you the findings from Vinitrac® New Zealand, our online wine drinker survey, with tracking available for both long and short term trends. This report also profiles New Zealand regular wine drinkers by age, and examines the profiles and shopping behaviours of New Zealand regular wine drinkers based on their average off-trade spend.’



- The data for this survey was collected in New Zealand in October 2012, October 2014 and October 2015
- Data was gathered via Wine Intelligence's Vinitrac® online survey:
  - 1,007 New Zealand regular wine drinkers (October 2012)
  - 1,006 New Zealand regular wine drinkers (October 2014)
  - 1,114 New Zealand regular wine drinkers (October 2015)

Respondents were screened to ensure that they drink wine at least once per month; drink red, white or rosé wine; and buy wine in the off-trade and/or in the on-trade

- Invalid respondents (those who sped through the survey or gave inconsistent answers to selected questions) were removed before analysis
- The data is representative of New Zealand regular wine drinkers in terms of age and gender

## 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:** • NZD 6,350 • AUD 5,250 • GBP 2,500 • USD 4,000 • EUR 3,500 • 5 Report Credits

Format: 82 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](mailto: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](mailto:jean-philippe@wineintelligence.com)

#### **CAPE TOWN**

Dimitri Coutras, South Africa Country Manager | T +27 828288866 | Email: [dcoutras@iafrica.com](mailto:dcoutras@iafrica.com)

#### **DELAWARE**

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

#### **FRANKFURT**

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

#### **LONDON**

Eleanor Hickey, Assistant to the CEO | T +44 020 7378 1277 | Email: [eleanor@wineintelligence.com](mailto:eleanor@wineintelligence.com)

#### **SYDNEY**

Natasha Rastegar, Australia Country Manager | T +61 (0) 428 755 057 | Email: [natasha@wineintelligence.com](mailto:natasha@wineintelligence.com)

#### **TRIESTE**

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