



SPARKLING WINE IN THE AUSTRALIAN MARKET

SEPTEMBER 2017



Sparkling Wine in the Australian Market 2017

Report overview



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Report price:

GBP 1,500
USD 1,950
AUD 2,700
EUR 1,800

The **Sparkling Wine in the Australian Market 2017** report includes:

- A 79-page PowerPoint report with the latest information regarding the Sparkling Wine category in Australia, supported by:
 - Wine Intelligence Vinitrac®
 - Wine Intelligence market experience
 - Secondary sources

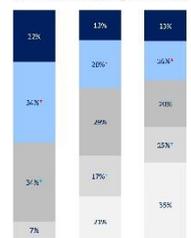
Sparkling wine consumption frequency by type

Consumers are drinking each sparkling type more frequently than they were in 2016

Sparkling wine types frequency of consumption

% who drink the following types of sparkling wine

Base: All drinkers of sparkling wine in Australia



Sparkling wine in the Australian Market 2017

*All prices exclusive of VAT, GST, or relevant local sale taxes at the current rate

Sparkling wine includes Prosecco and

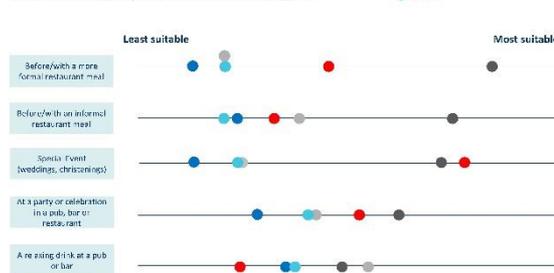
Alcoholic beverage suitability: on-premise

Sparkling wine is seen as the least suitable beverage for a relaxing drink at a pub or bar

Suitability of different alcoholic beverages by on-premise occasion

% who drink the following beverages at the following occasions

All Base: All drinkers of sparkling wine in Australia who drink the following drinks



Sparkling wine in the Australian Market 2017

Source: WINE Intelligence, "Sparkling Wine in the Australian Market 2017" (September 2017)



Sparkling wine
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Market 2017

*All prices exclusive of VAT, GST, or relevant local sale taxes at the current rate



Sparkling Wine in the Australian Market 2017

Sample output



Report

- The 79-page Sparkling Wine in the Australian Market 2017 report features:
 - Sparkling wines market context – market, size, volume and per capita consumption
 - Sparkling wine consumption and preference vs. other alcoholic beverages
 - Sparkling wine sub-category consumption and profiling
 - Sparkling wine purchase and consumption channels – consumption location on- and off-premise, typical spend, purchase choice cues, involvement and buying channels
 - Sparkling wine drinker profiling – frequency of sparkling consumption, age and gender
 - Sparkling wine brand health – awareness, purchase, conversion, affinity and recommendation, brand consumer profile, region of origin (including Australian regions)
 - Sparkling wine NPD and innovation – ways of consuming e.g. mixed cocktails, innovation e.g. alcohol levels, infused and calorie, sparkling wine closures

Sample output

Top 15 unprompted awareness of sparkling wine

Size of words: Font size of words proportional to the number of mentions

Base: All drinkers of sparkling wine in Australia

Question: Thinking about sparkling wine, which brands come to mind?



Contents



1.	Key Trends	p.4	
2.	Management summary	p.7	
	▪ Value for money and quality perception		
	▪ Sparkling brand power		
	▪ Monthly drinkers of sparkling wine in Australia profile		
3.	Sparkling wine market context	p.11	
	▪ Market size		
	▪ Sparkling wine volumes in the Australian market		
	▪ Per capita consumption of sparkling wine		
4.	Sparkling wine vs other alcoholic beverages	p.15	
	▪ Sparkling wine vs. other alcoholic beverages frequency		
	▪ Preferred beverage among sparkling wine drinkers		
	▪ Beverage suitability by occasion		
5.	Sparkling wine sub-category consumption and profiling	p.20	
	▪ Frequency of sparkling wine consumption		
	▪ Sparkling wine types consumption reach		
	▪ Sparkling wine consumption frequency by type		
	▪ Sparkling wine consumption change by type		
	▪ Sparkling wine quality perception		
	▪ Sparkling wine value for money perception		
	▪ Imagery statements for sparkling wine types		
6.	Sparkling wine purchase and consumption channels	p.30	
	▪ Sparkling wine types consumption locations		
	▪ Typical recalled spend for sparkling wine by the bottle		
	▪ Sparkling wine types format in a bar/pub		
	▪ Sparkling wine types format in restaurant		
	▪ Reported typical spend for sparkling wine by the bottle		
	▪ Typical spend for sparkling wine by the glass		
	▪ Imported sparkling wine choice cues		
	▪ Attitude towards sparkling wine		
	▪ Sparkling wine involvement		
	▪ Sparkling wine buying channels		
6.	Sparkling wine drinker profile		p.41
	▪ Monthly drinkers of sparkling wine in Australia profile		
	▪ Gender distribution of drinkers by type of sparkling wine		
	▪ Age distribution of drinkers by type of sparkling wine		
	▪ Sparkling suitability occasions by gender and age: Off-trade		
	▪ Sparkling suitability occasions by gender and age: On-trade		
	▪ Involvement with sparkling wine by gender and age		
	▪ Profiling of sparkling wine drinkers by gender		
7.	Sparkling wine brand health		p.49
	▪ Sparkling wine brand power		
	▪ Sparkling wine brand unprompted awareness		
	▪ Top 25 sparkling wine brands by awareness and purchase		
	▪ Sparkling wine brand awareness		
	▪ Sparkling wine brand purchase		
	▪ Sparkling wine brand conversion		
	▪ Sparkling wine brand affinity		
	▪ Sparkling wine brand recommendation		
	▪ Profiling of top 10 sparkling wine brands		
	▪ Association of region with sparkling wine production and respective purchase rate		
8.	Sparkling wine new product development and innovation		p.64
	▪ Sparkling wine serving styles		
	▪ Sparkling product types		
	▪ Sparkling closures		
9.	Appendix		p.75
	▪ Methodology		

Key trends: Sparkling wine in Australia

1. **Growing population of sparkling wine drinkers in Australia, enhanced by increased frequency of consumption amongst sparkling wine drinkers**
 - The total number of Australian consumers who drink sparkling wine at least once per month has increased to 5.7 million in 2017
 - Amongst sparkling wine drinkers, a growing proportion of them are now drinking sparkling wine on a more frequent basis compared with 2016; a higher proportion of drinkers now enjoying sparkling wine at least once per week

2. **Imported sparkling wine experiencing substantial growth in volume driven by increased number of drinkers of imported sparkling wine**
 - Imports of sparkling wine have experienced 7% growth in volume since 2016 ¹
 - The number of drinkers of imported sparkling wines such as Champagne, Cava and Italian Prosecco has grown significantly since 2013

3. **Trusted brands are important**
 - When deciding which sparkling wine to buy, consumers tend to stick to sparkling brands they know and trust
 - Domestic producers such as Jacob's Creek and Brown Brothers are the most likely sparkling brands to be recommended by drinkers of sparkling wine in Australia, who also have strong affinity for these sparkling brands



4. Sparkling with low calories and low sugar can be appealing

- Drinkers of sparkling wine in Australia are more open-minded towards lower sugar and lower calorie products than sparkling wines that are lower or no alcohol
- Regardless of whether consumers are motivated by health concerns or weight loss, they are turning to lower calorie beverages that aim to replicate the 'adult' flavour and drinking experience of wine (but without the adverse health effects)

5. Adventurous younger drinkers of sparkling wine

- Younger consumers of sparkling wine are more willing to experiment with serving styles of sparkling wine e.g. in a cocktail or as a spritz
- Younger drinkers are also significantly more open to sparkling wine with fruit flavours than older drinkers

6. Men are frequent drinkers of sparkling wine, and have a key impact on the category

- 45% of drinkers of sparkling wine in Australia are men
- Overall, men consume 53% of the volume of sparkling wine consumed in Australia, which equates to 54% of the spend
- Men are less likely than women to be occasional sparkling wine drinkers and are also willing to spend more on sparkling wine both by the glass and by the bottle



Vinitrac®:

- The data for this study was collected in August 2013, July 2016 and July 2017
- Data was gathered via Wine Intelligence's Vinitrac® online survey of Australian all alcohol drinkers and sparkling wine drinkers:
 - 2013 – 1,255 sparkling wine drinkers
 - 2016 – 588 sparkling wine drinkers
 - 2017 – 1,000 sparkling wine drinkers
- Respondents meet the following requirements:
 - Adult drinking age
 - Permanent resident of the country
 - Drink sparkling wine
- 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 alcohol drinkers and sparkling wine drinkers in terms of age and gender

Sources: Wine Intelligence, Vinitrac® Sparkling Australia, July '17 n=1,000, July '16 n=588, July '13 n= 1,255 drinkers of sparkling wine in Australia



**Sparkling wine
in the Australian
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How does Vinitrac® work?

1) Defining the right samples:

- Wine Intelligence, with the support of global research companies (e.g. TNS, YouGov), regularly runs calibration studies in each market 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:

- 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:

- 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 2,700 • GBP 1,500 • USD 1,950 • EUR 1,800 • 3 Report Credits

Format: 79-page PowerPoint (PDF)

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