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# NEW ZEALAND LANDSCAPES

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February 2018 Report

The logo for Wine Intelligence, featuring the word "wine" in a lowercase, sans-serif font with a white dot above the "i", and the word "intelligence" in a smaller, lowercase, sans-serif font below it. The logo is set against a light blue circular background.

wine  
intelligence



# New Zealand Landscapes 2018

## Report overview



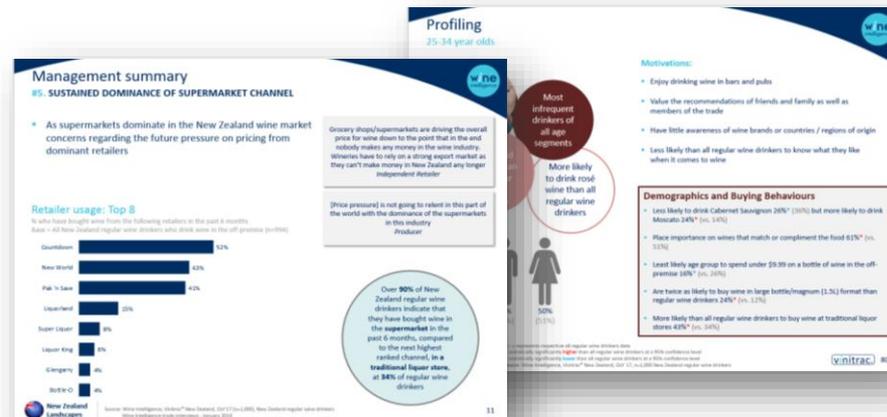
Report price:

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

5  
report  
credits

The New Zealand Landscapes 2018 report includes:

- Report with the latest information regarding the New Zealand wine market, supported by:
  - Wine Intelligence Vinitrac®
  - Wine Intelligence market experience
  - Secondary sources
  - Trade interviews
- User-friendly data table with all the measures from Vinitrac® showing significances, cross tabbed with:
  - All New Zealand regular wine drinkers in 2017
  - Gender groups
  - Age groups
  - New Zealand regions
- Tracking data vs. 2016 and 2014



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### 1. CONTINUED GROWTH OF ROSÉ, CRAFT BEER AND PROSECCO

- New Zealand regular wine drinkers are continuing to expand their beverage repertoire, with rosé wine, craft beer and Prosecco all experiencing significant growth in the number of drinkers of these categories

### 2. A NATION AWARE OF IMPORTED WINE, DESPITE DOMESTIC DOMINANCE

- New Zealand regular wine drinkers have strong awareness of imported wines, whilst their repertoire of wine choice continues to be dominated by domestic offerings

### 3. STATIC WINE CATEGORY BUT FUTURE OPTIMISM

- The wine category in New Zealand has remained stable, after a period of negative growth, with consumption and typical spend seeing no major changes. Trade optimism about the future of wine production and expected wine quality levels

### 4. CONTINUED PRESSURE ON WINE MARGINS

- The pressure on producer margins remains strong, especially for smaller scale producers. Consolidation and ongoing dominance of larger scale producers anticipated

### 5. SUSTAINED DOMINANCE OF SUPERMARKET CHANNEL

- The New Zealand retail landscape continues to be dominated by the major supermarkets, with over 90% of regular wine drinkers purchasing wine through this channel

### 6. DOMINANCE OF MARLBOROUGH AND THE EMERGENCE OF CENTRAL OTAGO

- Marlborough continues to be the most likely region of origin for New Zealand regular wine drinkers to be both aware of and purchase, whilst trade experts are recognising the emergence of Central Otago as the major player for red wine

### 7. OPTIMISM FOR ORGANIC WINE

- Future opportunity identified for organic wine in the New Zealand wine market, with increasing listings by retailers anticipated. Delivering sustained quality within the organic sector remains paramount

### 8. POTENTIAL FOR LOWER ALCOHOL WINE – DISPARITY BETWEEN CURRENT CONSUMER RESPONSE & TRADE VIEW

- Trade experts believe there is consumer interest in lower alcohol wines, but are surprised that more consumers are not drinking from this category already, considering a large number of drinkers are looking to reduce their consumption of alcohol

### 9. DECLINE IN THE PROPORTION OF REGULAR WINE DRINKERS CONSUMING MAINSTREAM VARIETALS

- There has been a decline in the proportion of regular wine drinkers consuming a number of mainstream varietals, which is a trend mirrored by other established markets. Trade experts are recognising an increase in consumption of alternative varieties

- The data for this survey was collected in New Zealand in October 2014, October 2016 and October 2017
- Data was gathered via Wine Intelligence's Vinitrac<sup>®</sup> online survey:
  - 1,006 New Zealand regular wine drinkers (October 2014)
  - 1,019 New Zealand regular wine drinkers (October 2016)
  - 1,000 New Zealand regular wine drinkers (October 2017)
- 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 New Zealand regular wine drinkers in terms of age, gender and New Zealand division



## Trade interview methodology

- Trade Interviews were conducted with 6 experienced industry professionals in the New Zealand wine trade in January 2018
- Interviews followed a pre-determined discussion guide, and covered overall market trends, opportunities for different wine styles, retail channels and pricing
- The six interviewees were members of the wine trade working in different roles:
  - 1 x Wine critic
  - 1 x Sommelier
  - 1 x Independent retailer
  - 1 x Online retailer
  - 2 x Producers

## 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 4,500 • GBP 2,500 • USD 3,250 • EUR 3,000 • 5 Report Credits

Format: 97-page PowerPoint (PDF) and Excel data table

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

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