



WINE INTELLIGENCE

# AUSTRALIA: WINE PACKAGING FORMATS

SEPTEMBER 2020

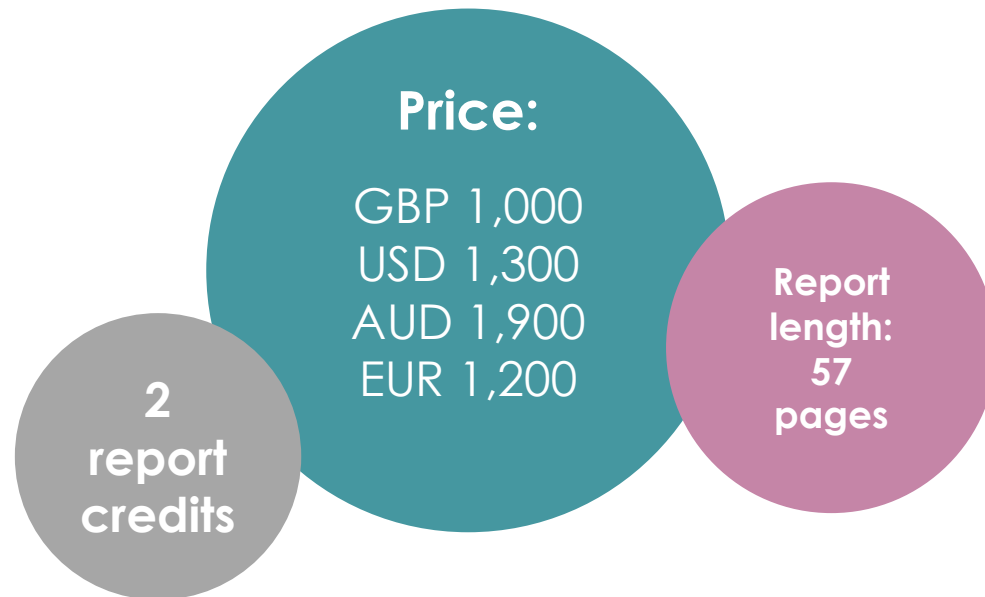
REPORT BROCHURE

# PRICING

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## Report + data table



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# INTRODUCTION

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Our 2020 study of wine packaging formats in the Australian market shows a noticeable increase in awareness of alternative packaging types amongst Australian wine consumers.

However, this increased awareness is not necessarily translating into increased purchase levels. In the case of wine in cans, awareness has grown significantly over the past three years, yet the conversion to purchase rate amongst those aware of wine in cans has declined over the same period, meaning that growing awareness is not currently translating across to purchase at the same rate. Trade experts predict that there are opportunities for smaller formats to support increasing moves to alcohol moderation and consumer demand for single serve to increase choice of products.

Casks continue to perform well in the Australian market, with a significant increase in awareness of smaller casks since 2017. However, casks of all size remain primarily associated with value for money and lower quality wine – a legacy they are yet to move away from. The main barrier to purchasing alternative packaging formats is the long-standing and habitual preference for standard glass

bottles, with these being more dominant in Australia than other comparable established markets. Smaller format bottles continue to be seen as delivering comparatively poor value for money, whilst magnums are seen as less practical and portable. In terms of which types of consumers are leading the opportunity for alternative formats for wine in Australia, awareness of these options is significantly higher amongst older 'Boomer' consumers. As for wine in cans, countering the typical view of trade experts, awareness of wine in cans is actually significantly higher amongst 40-55 year olds rather than amongst younger Gen Z and Millennials consumers. However, despite having generally lower awareness of alternative wine packaging formats, purchase of these formats is higher amongst younger drinkers, once they become aware of the options available.

# RESEARCH METHODOLOGY: QUANTITATIVE



The data for this report was collected in Australia in October 2017 and July 2020

Data was gathered via Wine Intelligence's Vinitrac® online survey

Respondents were screened to ensure that they were at least 18 years old; drank red, white or rosé wine at least once a month; and have bought 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 Australian regular wine drinkers in terms of gender, age and region

The distribution of the sample is shown in the table:

		Oct-17 <i>n=</i> <b>1,000</b>	Jul-20 <b>1,000</b>
<b>Gender</b>	Male	50%	54%
	Female	50%	46%
	<b>Total</b>	<b>100%</b>	<b>100%</b>
<b>Age</b>	18-24	13%	9%
	25-34	19%	19%
	35-44	16%	18%
	45-54	15%	19%
	55-64	16%	16%
	65 and over	20%	19%
<b>Total</b>	<b>100%</b>	<b>100%</b>	
<b>Region</b>	Australian Capital Territory	1%	1%
	New South Wales	33%	33%
	Northern Territory	2%	1%
	Queensland	18%	20%
	South Australia	7%	7%
	Tasmania	1%	3%
	Victoria	29%	25%
	Western Australia	9%	9%
	<b>Total</b>	<b>100%</b>	<b>100%</b>

Source: Wine Intelligence, Vinitrac® Australia, October 2017 (n=1,000) and July 2020 (n=1,000) Australian regular wine drinkers

# RESEARCH METHODOLOGY: QUALITATIVE



## TRADE INTERVIEWEES

Trade Interviews were conducted with experienced industry professionals in Australia in 2020

Interviews followed a pre-determined discussion guide, and covered overall market trends, opportunities for different wine styles, retail channels and pricing

The three interviewees were members of the wine industry working in different roles:

*1 x Producer*

*1 x Category Manager, National Retailer*

*1 x Marketing Manager, Producer*

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