



WINE INTELLIGENCE

NEW ZEALAND WINE LANDSCAPES 2021

MARCH 2021

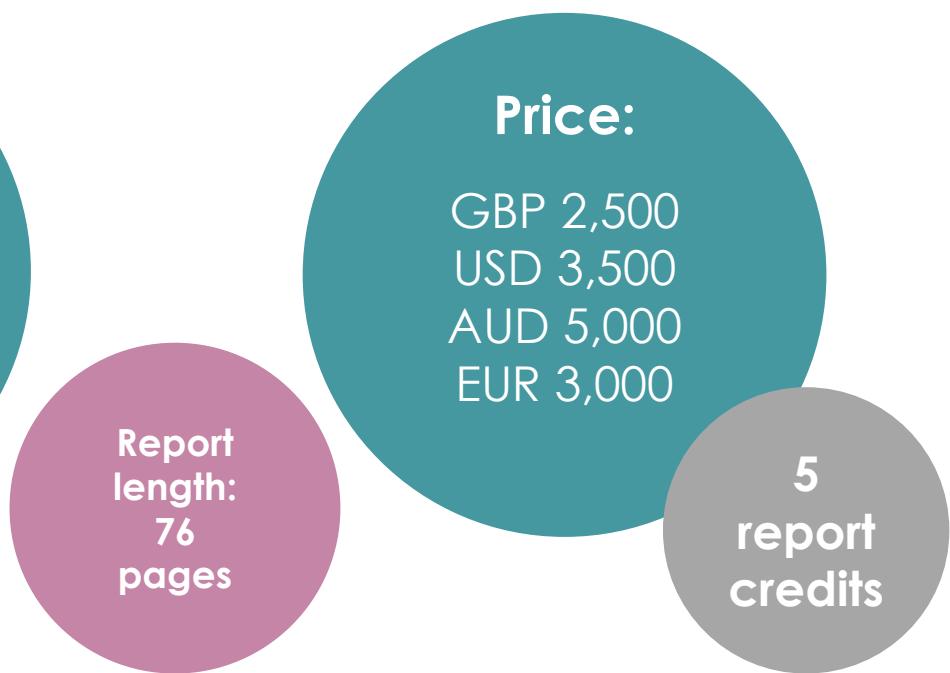
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DATA TABLE DETAILS

Data table includes:

- **Profiling by cross-tabs** including gender, age, income, location, online wine buyers and wine involvement
- **Tracking** against past waves where available
 - This data table includes October 2014, 2016, 2017 and 2020
- **All significances highlighted**

Example screenshot of data table:

Data will not be blurred when you receive the report

		New Zealand regular wine drinkers	Gender		Age 5 groups					Age 3 groups		
	Sample size n=		Male	Female	18-24	25-34	35-44	45-54	55 and over	18-34	35-54	55 and over
Section A - Demographics												
Demographics												
Base = All New Zealand regular wine drinkers (n = 1,002)												
Gender			Male	50%	469	533	109	225	116	179	373	334
Female			Female	50%	469	533	109	225	116	179	373	334
Age 5 groups			18-24	15%	70	70	15%	35%	18%	45%	52%	48%
			25-34	20%	135	135	20%	40%	20%	50%	52%	50%
			35-44	24%	108	108	24%	48%	24%	54%	56%	54%
			45-54	20%	84	84	20%	40%	20%	52%	54%	52%
			55 and over	11%	63	63	11%	22%	11%	30%	32%	30%
Age 3 groups			18-34	25%	255	255	50%	100%	50%	100%	100%	100%
			35-54	54%	546	546	108%	216%	108%	216%	216%	216%
			55 and over	19%	195	195	38%	76%	38%	76%	76%	76%
Age generations			18-24 Gen Z	11%	115	135	11%	22%	11%	22%	22%	22%
			25-39 Millennials	29%	295	268	29%	58%	29%	58%	58%	58%
			40-54 Gen X	29%	295	269	29%	58%	29%	58%	58%	58%
			55+ Boomers	33%	335	335	33%	66%	33%	66%	66%	66%
Gender x age			Male - 18-34	10%	10	10	10%	20%	10%	20%	20%	20%
			Male - 25-34	12%	12	12	12%	24%	12%	24%	24%	24%
			Male - 55+	18%	18	18	18%	36%	18%	36%	36%	36%
			Female - 18-34	16%	16	16	16%	32%	16%	32%	32%	32%
			Female - 35-54	18%	18	18	18%	36%	18%	36%	36%	36%
			Female - 55+	10%	10	10	10%	20%	10%	20%	20%	20%
Annual household income before taxes			Under \$35,000	10%	10	10	10%	20%	10%	20%	20%	20%
			\$35,000 - \$49,999	11%	11	11	11%	22%	11%	22%	22%	22%
			\$50,000 - \$79,999	10%	10	10	10%	20%	10%	20%	20%	20%
			\$80,000 - \$99,999	10%	10	10	10%	20%	10%	20%	20%	20%
			\$100,000 - \$119,999	10%	10	10	10%	20%	10%	20%	20%	20%
			\$120,000 - \$139,999	6%	6	6	6%	12%	6%	12%	12%	12%
			\$140,000+	3%	3	3	3%	6%	3%	6%	6%	6%
Region			Auckland	15%	15	15	15%	30%	15%	30%	30%	30%
			Wellington	7%	7	7	7%	14%	7%	14%	14%	14%
			Rest of North Island	2%	2	2	2%	4%	2%	4%	4%	4%
			Canterbury	2%	2	2	2%	4%	2%	4%	4%	4%
			Rest of South Island	1%	1	1	1%	2%	1%	2%	2%	2%
Percent to answer												

Wine Intelligence market experts are available to help you understand the data table

INTRODUCTION



In the highly competitive and increasing diverse world of wine, New Zealand is a country that fights well above its weight. For a “team of five million” to quote Prime Minister Ardern, New Zealand has accelerated its wine industry from humble beginnings to the envy of export strategies worldwide with internationally acclaimed wines that have attracted an engaged and loyal consumer following. However, commentary is often focused on the export market with little focus on the domestic industry. That is why Wine Intelligence is pleased to release our New Zealand Wine Landscapes 2021, our first snapshot of the domestic market since 2018.

As expected in an increasingly connected world, the New Zealand domestic industry shares similar trends to other developed wine markets as well as some nuances unique to the land of the long white cloud. For instance, take the shifting consumer profile of the regular wine drinker. Similar to what we are seeing in neighbouring Australia, the adult population of New Zealand continues to grow yet this doesn’t translate into more regular wine drinkers as the percentage of adults that consume wine monthly declines. However, if we dive deeper into the consumer profile of regular wine drinkers, we can see a significant growth in the proportion of those under 35 years of age. Although the profile is still heavier skewed to drinkers over 45 years old, this does show promising signs that younger drinkers are entering the category, an image that is not commonly seen in other developed markets.

Although the hospitality sector has taken a beating during the pandemic, there is a silver lining in our data that premiumisation is occurring for nearly every occasion in the on-(and off-) premise. This combined with an increase in wine confidence paints a positive outlook for those involved with the selling of wine in the market.

Yet, there are a few warning signs that could hamper any domestic growth. As we are seeing globally, there are increases in the proportion of drinkers consuming craft beer, gin, ready-to-drink beverages and cocktails, as consumers move away from being drinkers of a single alcohol category and experiment across the sector. Members of the premise also flagged the introduction of alcoholic seltzers and their potential impact on particularly the younger demographics.

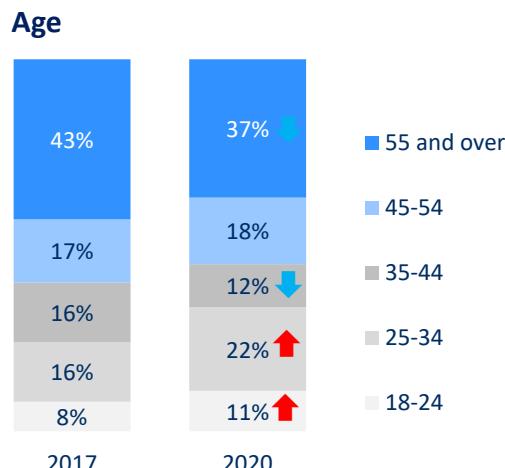
Finally, a trend that we have seen globally and in the New Zealand market is the decline in awareness of varietals, countries of origin, regions of origins and brands. This will be of particular interest to marketers and producers as it begs the questions- how do you sell a bottle of wine when the traditional choice cues are becoming less important? The answer isn’t a clear one but from initial research it seems that other elements such as label design and descriptors are becoming more important in the consumer journey.

NEW ZEALAND'S WINE DRINKING POPULATION IS GETTING SMALLER AND YOUNGER

The proportion of adults that drink wine at least once a month has declined as younger age groups grow

Despite the adult population of New Zealand increasing since 2015, the proportion of adults that drink wine at least once per month has declined - resulting in a smaller population of regular wine drinkers in the country

Additionally, of the wine drinkers that remain, a significantly larger proportion of them are aged between 18 and 34 (33% in 2020 vs 24% in 2017), suggesting it is the older age groups that are leaving the category



Sources:

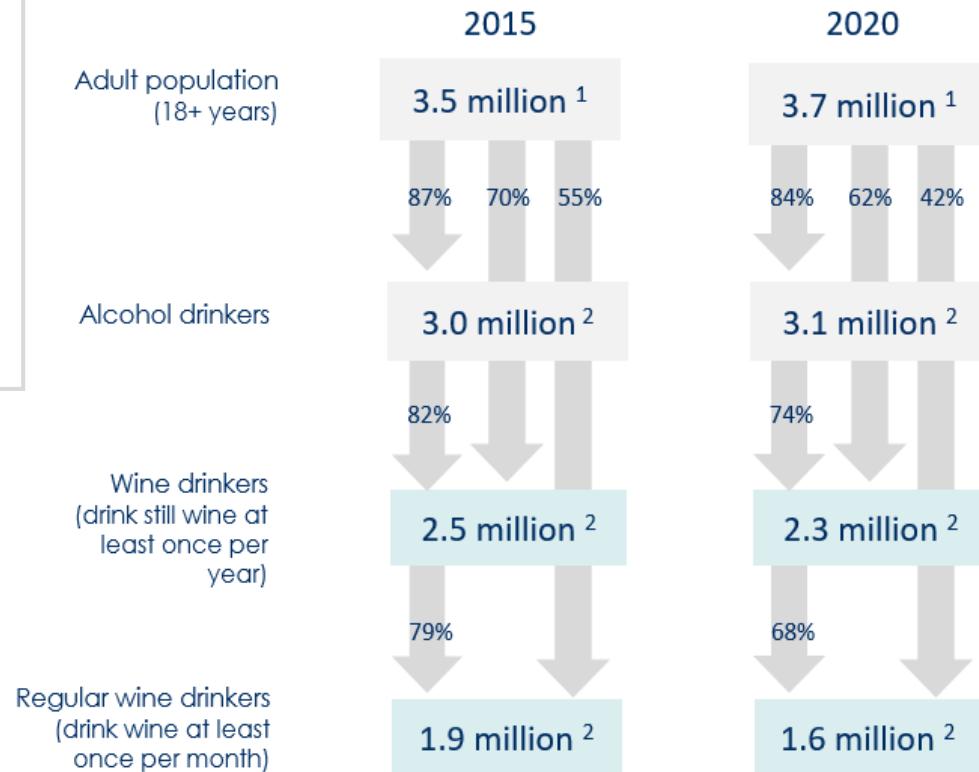
↑ / ↓ : Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level

1 National Statistics New Zealand

2 Wine Intelligence online calibration studies 2015 and 2019

3 Wine Intelligence, Vinitrac® New Zealand Oct'17 and Oct '20, (n≥1,000) New Zealand regular wine drinkers

Changes in the New Zealand wine drinking population



EXAMPLE SLIDE: ATTITUDES TOWARDS WINE



Attitudes towards wine have remained broadly stable through the years. However, the 18-34 age set is significantly more likely to try new styles of wine whereas the over 55s stick to what they know and enjoy

Attitude towards wine: Tracking

Base = All New Zealand regular wine drinkers (n≥1,000)

n=	2014	2016	2017	2020	Tracking		
	1,013	1,019	1,000	1,002	vs. '14	vs. '16	vs. '17
I enjoy trying new and different styles of wine on a regular basis	35%	36%	37%	34%	↗	↗	↗
I don't mind what I buy so long as the price is right	30%	28%	27%	29%	↗	↗	↗
I know what I like and I tend to stick to what I know	35%	36%	36%	37%	↗	↗	↗

Attitudes towards wine by age

Base = All New Zealand regular wine drinkers (n= 1,002)

n=	All New Zealand regular wine drinkers	Age groups		
		18-34	35-54	55+
I enjoy trying new and different styles of wine on a regular basis	34%	44%	39%	23%
I don't mind what I buy so long as the price is right	29%	38%	32%	18%
I know what I like and I tend to stick to what I know	37%	18%	29%	59%

Red / Blue: Statistically significantly **higher** / **lower** than all regular wine drinkers at a 95% confidence level

↑ / ↓: Statistically significantly **higher** / **lower** than the previous wave(s) at a 95% confidence level

Source: Wine Intelligence, Vinitrac® New Zealand, Oct'14, Oct'16, Oct'17 & Oct'20 , (n≥1,000) New Zealand regular wine drinkers

EXAMPLE SLIDE: WINE-BUYING CHOICE CUES

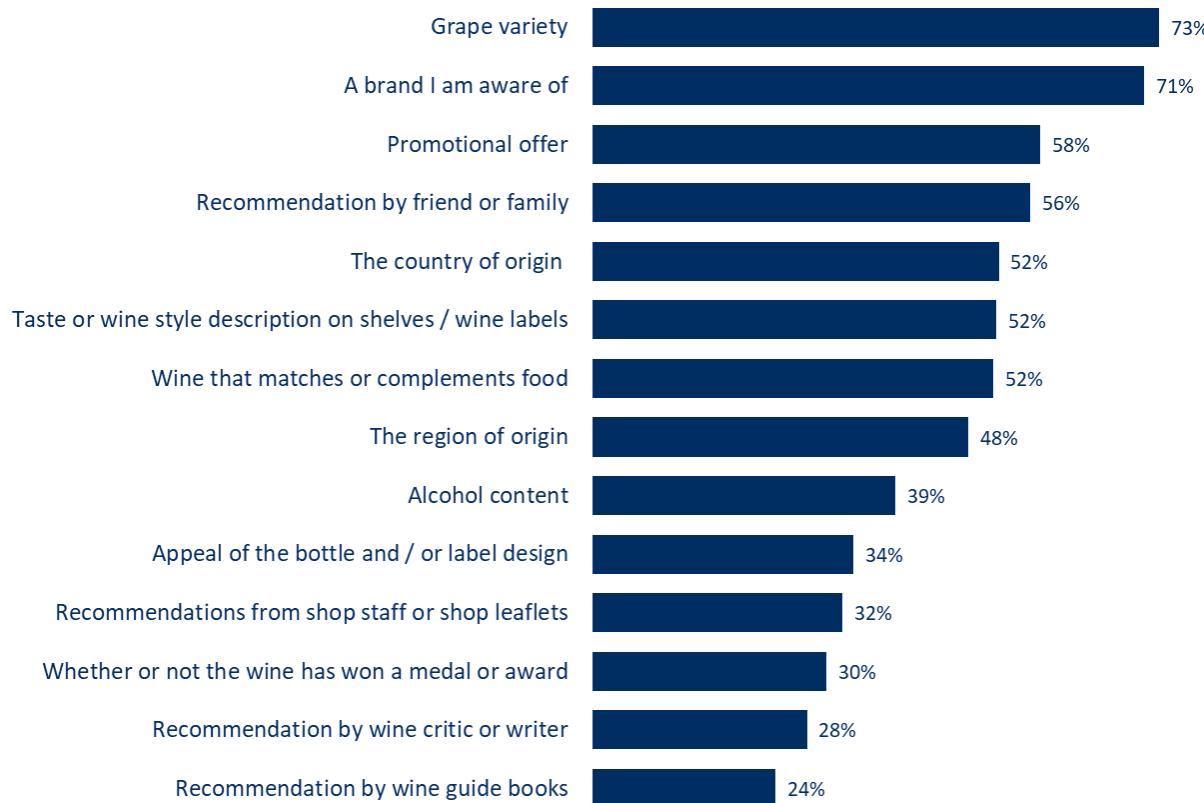


When choosing a wine, New Zealand regular wine drinkers are looking to grape variety first and foremost, with brand recognition a close second, signifying the importance of brand awareness in the New Zealand wine market

Wine-buying choice cues

% who indicate each of the following factors is 'important' or 'very important' when buying wine

Base = All New Zealand regular wine drinkers (n=1,002)



RESEARCH METHODOLOGY: QUANTITATIVE



- The data has been collected in New Zealand since October 2014
- October 2020 was tracked against October 2014, October 2016 and October 2017
- 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 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 New Zealand regular wine drinkers in terms of age, gender and region
- The distribution of the sample is shown in the table:

		<i>Oct-14 n= 1,013</i>	<i>Oct-16 n= 1,019</i>	<i>Oct-17 n= 1,000</i>	<i>Oct-20 n= 1,002</i>
Gender	Male	48%	50%	49%	47%
	Female	52%	50%	51%	53%
	Total	100%	100%	100%	100%
Age	18-24	10%	10%	8%	11%
25-34	17%	17%	16%	22%	
35-44	21%	16%	16%	12%	
45-54	18%	19%	17%	18%	
55 and over	34%	38%	43%	37%	
	Total	100%	100%	100%	100%
Region	Auckland	33%	32%	38%	42%
Wellington	15%	13%	11%	10%	
Rest of North Island	29%	31%	29%	27%	
Canterbury	12%	12%	13%	12%	
Rest of South Island	10%	12%	9%	9%	
	Total	100%	100%	100%	100%

Source: Wine Intelligence, Vinitrac® New Zealand, October 2014 (n = 1,013), October 2016 (n = 1,019), October 2017 (n = 1,000) and October 2020 (n = 1,002) New Zealand regular wine drinkers

Other sources in the report include Wine Intelligence market experience, secondary sources and consumer interviews.

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