



WINE INTELLIGENCE

Sparkling Wine in the Australian Market

September 2021

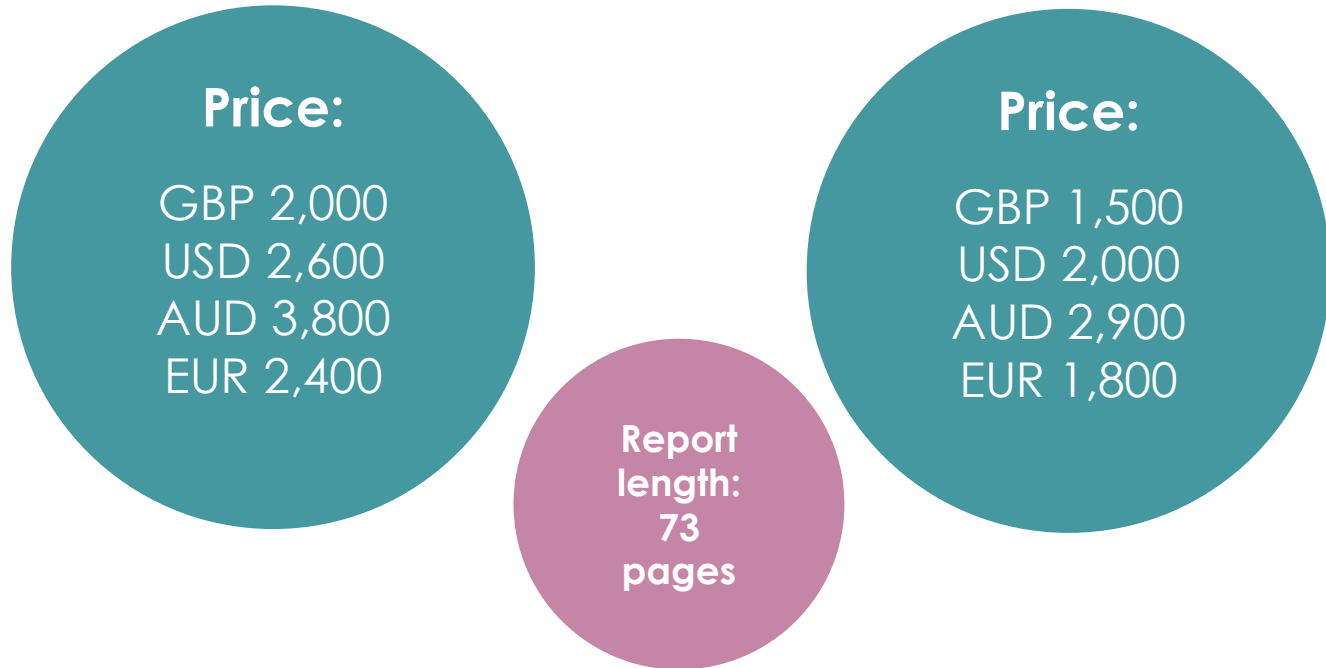
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INTRODUCTION



The sparkling wine category has had a rollercoaster year globally, and the Australian market is no exception. The experience of 2020 & 2021 will live long in the memory of most drinks industry players, particularly the rapid pivot to off-premise and online sales as a series of lockdowns and restrictions shuttered bars and restaurants in major cities.

Perhaps the surprise in this report, therefore, is that the market for sparkling wine in Australia has not changed fundamentally, despite all the upheaval. Imports are still growing, led by Italian Prosecco; the population of sparkling wine drinkers is steady; and overall frequency of consumption hasn't moved significantly since 2019.

Some of the apparent stability may be a case of oppositional trends cancelling each other out. No weddings and big celebrations might mean less fizz being poured there, but sparkling wine at home might be an acceptable up-beat substitute for that cocktail after work in the bar that you now can't enjoy.

Look beneath the apparent stability, and the tectonic plates of long-term consumer behaviour

change appear to be moving, in some cases fostered by Covid, in other cases reflecting far longer-lived lifestyle trends. In common with several other markets – particularly the US – the consumers driving most volume in Australia are younger, mid-to-high income males. Typically in their early 30s, and earning around AUD 100k a year, these drinkers are using sparkling in a different way to the traditional 'high days and holidays' approach. For them, it's a drink to have before or with the evening meal at least once a week, and they are the ones who have focused particularly on buying lower priced imports such as Prosecco and Cava during the pandemic.

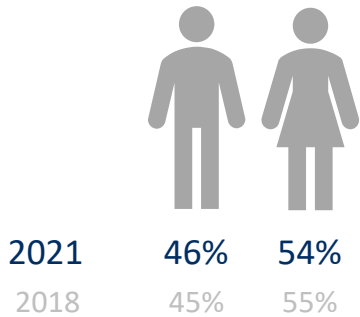
Thanks to this group, and the general youthfulness of sparkling drinkers in Australia (almost half are under 45), the prospects for the category in the 2020s are looking a lot brighter than they might have appeared to be at the height of the initial Covid-related lockdowns. The category has proven resilient in the face of unprecedented disruption to people's lifestyles. It is a fair bet that its importance will endure as Australia slowly comes to grips with life in the Covid era.

EXAMPLE SLIDE: DEMOGRAPHICS OF SPARKLING WINE DRINKERS IN AUSTRALIA

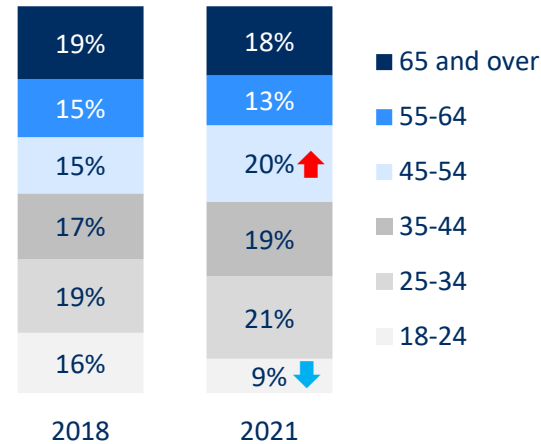


The age profile of sparkling wine drinkers in Australia is broadly stable, though note the drop in younger LDA+ drinkers into the category

Gender



Age



Regions

| Region | 2018 | 2021 |
|------------------------------|------|-------|
| New South Wales | 36% | 34% |
| Victoria | 30% | 27% |
| Queensland | 16% | 20% ↑ |
| Western Australia | 10% | 9% |
| South Australia | 6% | 6% |
| Australian Capital Territory | 0% | 3% ↑ |
| Tasmania | 1% | 1% |
| Northern Territory | 0% | 0% |

Annual household income (before tax)

| Income Bracket | 2018 | 2021 |
|-----------------------|------|-------|
| Under \$59,999 | 32% | 32% |
| \$60,000 - \$99,999 | 23% | 28% ↑ |
| \$100,000 - \$149,999 | 21% | 18% |
| \$150,000 and over | 13% | 15% |
| Prefer not to answer | 10% | 8% ↓ |

↑ / ↓ : Statistically significantly higher / lower than 2018 at a 95% confidence level

Source: Wine Intelligence, Vinitrac® Australia, Jul'18 and Jun'21 (n≥1,000) Australian drinkers of sparkling wine who drink sparkling wine at least once a year

EXAMPLE SLIDE: ALCOHOLIC BEVERAGE SUITABILITY: OFF-PREMISE



Sparkling wine less suitable for more formal off-premise occasions and becoming more suitable for more informal occasions compared with 2018

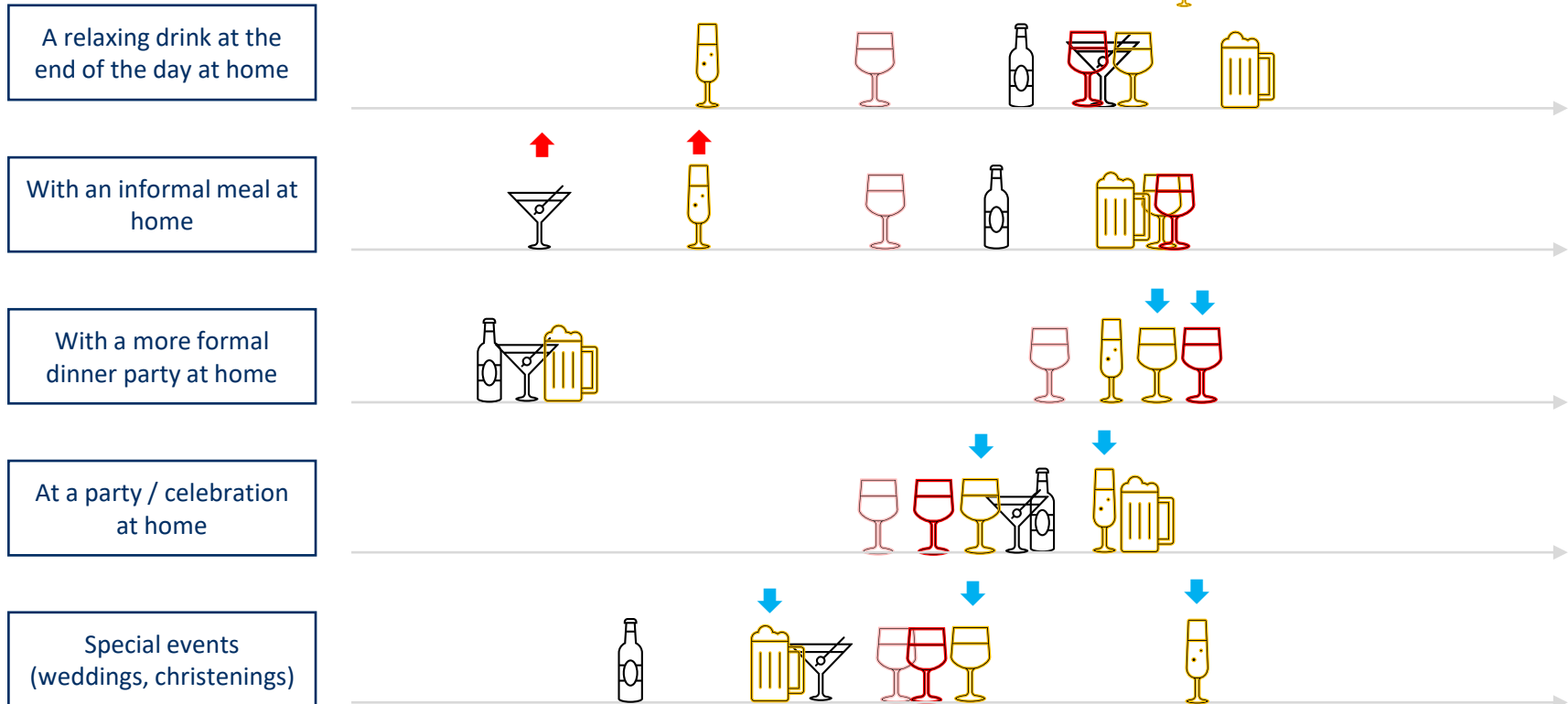
Beverage suitability for off-premise occasions: 2018 vs 2021

% who would consider drinking the following beverages on the following off-premise occasions
 Base = Those who have drunk the following beverages in the past 12 months



Least suitable

Most suitable



↑ / ↓ : Statistically significantly higher / lower than 2018 at a 95% confidence level

Source: Wine Intelligence, Vinitrac® Australia, Jul'18, and Jun'21 (n≥1,000) Australian drinkers of sparkling wine who drink sparkling wine at least once a year

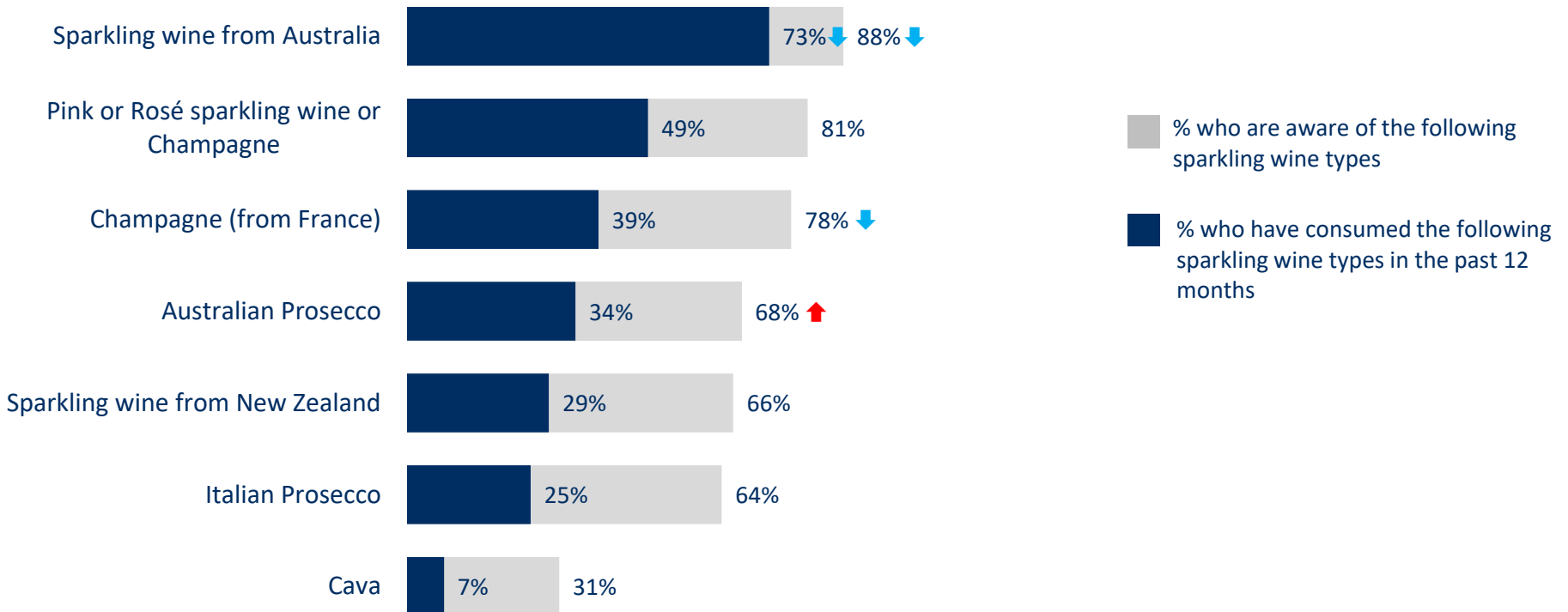
EXAMPLE SLIDE: SPARKLING WINE AWARENESS AND CONSUMPTION



Awareness of domestic sparkling and French Champagne has declined in lieu of an increase in Australian Prosecco awareness

Sparkling wine types awareness and consumption

Base = All Australian drinkers of sparkling wine who drink sparkling wine at least once a year (n=1,003)



↑ / ↓ : Statistically significantly higher / lower than the previous 2019 wave at a 95% confidence level

Source: Wine Intelligence, Vinitrac® Australia, Jan'19, and Jun'21 (n≥1,003) Australian drinkers of sparkling wine who drink sparkling wine at least once a year

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