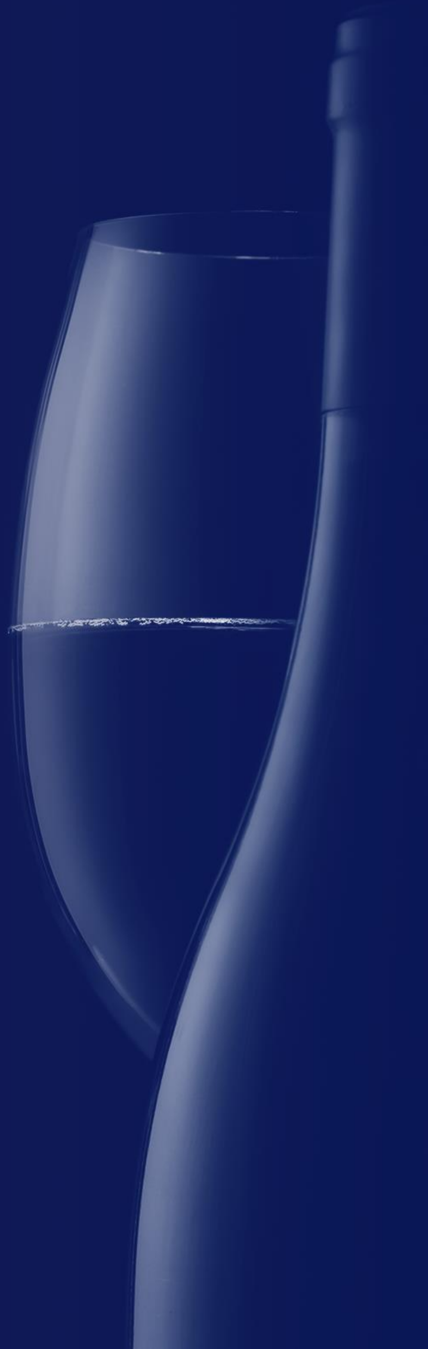
IWSR drinks market analysis

# New Zealand

Wine Landscapes 2023



# Contents

# IWSR Viewpoint

**Despite the wine drinking population in New Zealand remaining stable since 2019, declining still wine volumes, particularly of domestically produced wine, hint at shifting preferences and economic impacts.**

The landscape of New Zealand's wine market has some intriguing dynamics, with a regular wine drinking population that has been stable since 2019, despite an increase in the overall adult population. This can be attributed to a decline in participation in the wine category. While the overall population has grown, fewer people are actively engaging with wine.

The volume of still wine sold in the New Zealand market has been in steady decline, with a 2.3% decrease from 2017–22. Per capita consumption declined by 2.7% during the same period. One possible reason for this is a rise in moderation among regular wine drinkers. Fewer are choosing to consume both red and white wine, possibly indicating a general shift in preferences or a growing inclination towards other alcoholic beverages. These evolving repertoires suggest that consumer tastes within the wine category are transforming.

Premiumisation persists in the New Zealand market, with regular wine drinkers spending more across all wine-drinking occasions than in 2017. There was also a discernible uptick in the volume of wine sold in the super-premium and ultra-premium categories between 2017 and 2022. This could be contributing to the declining total volume of wine sold, as consumers engage in a 'less-but-better' trend.

Demographic shifts among regular wine drinkers are also noteworthy. There is a visible move away from low-income drinkers towards high-income individuals. Despite optimism being expressed by high earners about their financial situations, the data suggests that they are purchasing less wine than 12 months ago. Moreover, when they do buy wine, they are opting for cheaper wines than a year ago, indicating that choice is being influenced by economic considerations.

Interestingly, positive sentiments expressed by regular wine drinkers about their current and future financial situations haven't brought a better wine category performance, with wine drinkers opting for cheaper options and drinking less wine overall. This shift in behaviour suggests that, while there is premiumisation within the market, there is also an element of down-trading, influenced by economic factors. Opportunities can, therefore, be found in these areas.

Gains can be found within particular age groups, with Millennials especially engaged with the wine market. They express a strong interest in wine and consider it important to their lifestyle. Higher engagement among Millennials sets them apart from other regular wine drinkers, indicating an influential demographic on the New Zealand wine scene.

### Opportunities

- Swing toward high-income drinkers.
- Premiumisation potential.
- Engaged Millennials.
- Sparkling wine.

### Threats

- Declining volumes of still wine sold in the market.
- Continuing economic hardships.
- Shifting preferences among regular wine drinkers.
- Growth of spirits and RTDs.

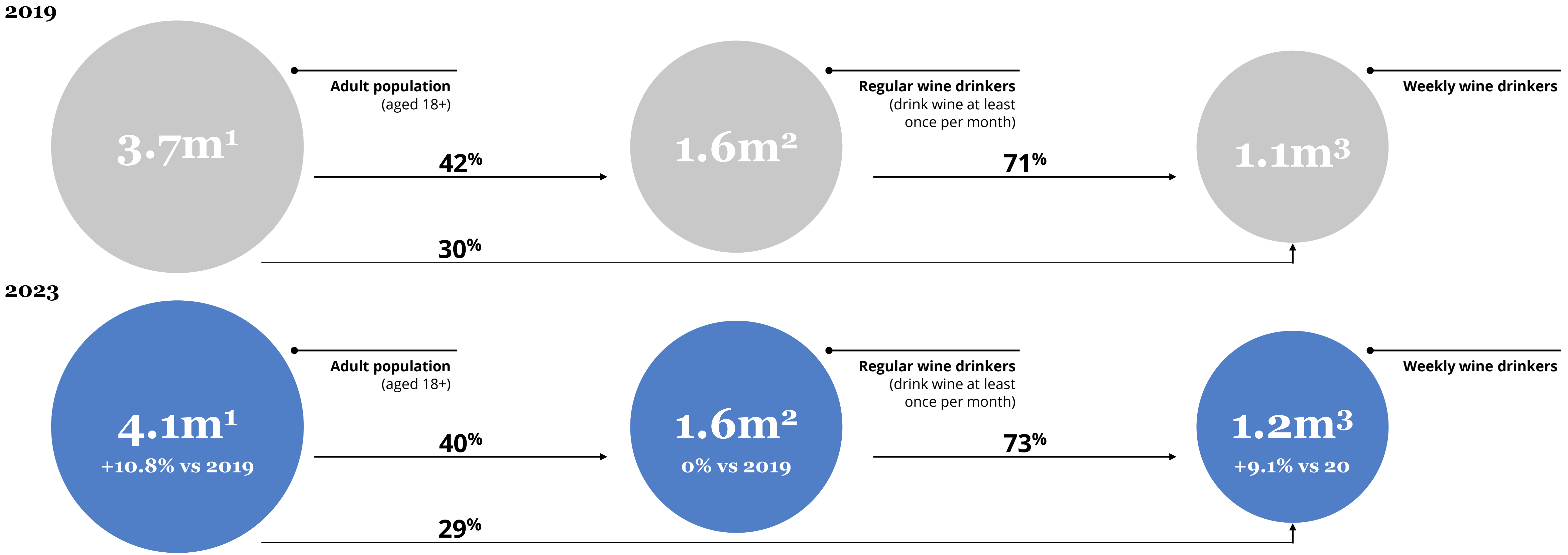
# Management Summary

# Key takeaways

1. Wine-drinking population remains stable
2. Increase in well-off regular wine drinkers
3. Regular wine drinkers are spending more
4. Both red and white wine consumption down
5. Positive consumer outlook
6. Millennials are highly involved with wine

# 1. Wine-drinking population remains stable

The adult population in New Zealand has grown since 2019 but the size of the regular wine drinker population is much the same as in 2019; this is because of lower participation among all adults within the wine category




1 National Statistics New Zealand
2 IWSR online calibration study, September 2019 (n=1,030), September 2023 (n=1,004) New Zealand adults. Wine=still light wine (red, white, rosé)
3, Vinitrac® New Zealand, October 2020 and November 2023 (n≥1,002) New Zealand regular wine drinkers

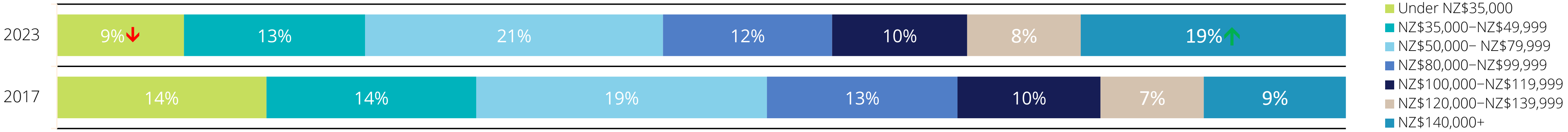
# 2. Increase in well-off regular wine drinkers

The proportion of high-income regular wine drinkers in New Zealand has increased significantly, while that of low-earners has fallen; high-earners are optimistic about their finances but are buying less wine and down-trading

**Q New Zealand regular wine drinkers*: who are they?**

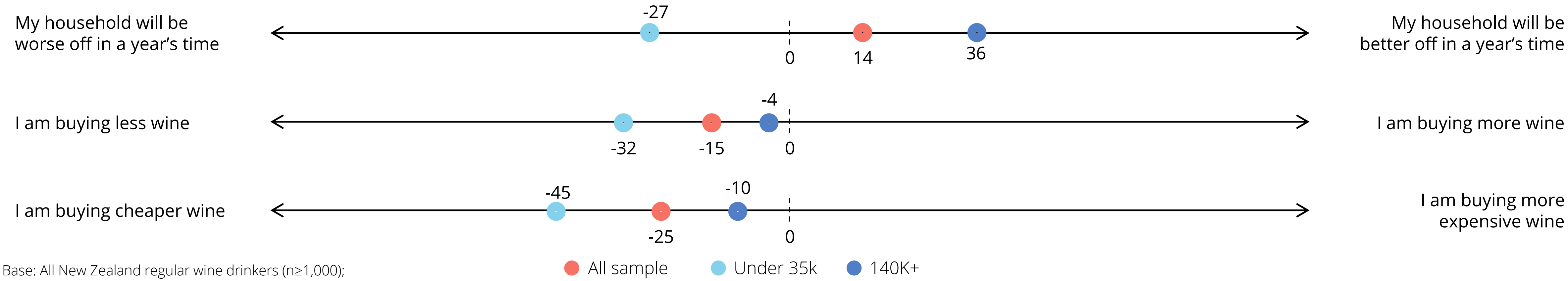
All regular wine drinkers in New Zealand in 2023 compared with 2017

**Income**




**Consumer sentiment by income: spending and wine**

Net score of percentage who agree with leftmost statement subtracted from the percentage who agree with the rightmost statement




Base: All New Zealand regular wine drinkers (n≥1,000);
↑/↓: Statistically significantly higher/lower than the October 2017 wave at a 95% confidence level
Source: IWSR Vinitrac®, October 2017 (n=1,000) and November 2023 (n=1,017) New Zealand regular wine drinkers
*Definition of RWD: Those respondents that drink wine once a month

# 3. Regular wine drinkers are spending more

## Regular wine drinkers are spending significantly more on wine in both the off-trade and on-trade compared with 2017 and 2020. This aligns with an increase in volumes sold at super-premium prices or higher

**Off-trade and on-trade: Typical spend per bottle by occasion**

Those who buy wine in the off-trade or on-trade

| Off-premise occasions | 2017 (n=1,000) | 2020 (n=1,002) | 2023 (n=1,017) | Tracking vs. '17 | Tracking vs. '20 |
|---|---|---|---|---|---|
| A relaxing drink at the end of the day at home | NZD 12.63 | NZD 13.72 | NZD 15.04 | ↑ | ↑ |
| With an informal meal at home | NZD 12.82 | NZD 13.70 | NZD 15.18 | ↑ | ↑ |
| With a more formal dinner party at home | NZD 16.59 | NZD 17.47 | NZD 19.22 | ↑ | ↑ |
| At a party / celebration at home | NZD 15.01 | NZD 16.02 | NZD 17.77 | ↑ | ↑ |
| As a gift for somebody | NZD 20.14 | NZD 20.70 | NZD 22.95 | ↑ | ↑ |
| **On-premise occasions** | | | | | |
| A relaxing drink out at the end of the day | NZD 19.57 | NZD 20.92 | NZD 21.42 | ↑ | → |
| With an informal meal in a pub / bar / restaurant / bistro | NZD 22.21 | NZD 23.83 | NZD 25.07 | ↑ | ↑ |
| With a more formal dinner in a restaurant | NZD 27.25 | NZD 27.38 | NZD 29.85 | ↑ | ↑ |
| At a party / celebration / big night out | NZD 23.11 | NZD 24.64 | NZD 26.33 | ↑ | ↑ |

### Market context

"There is still an underlying premiumisation trend, with some growth seen in super- and ultra-premium (NZD20+). Premium-and-below segments declined, and, with rising cost of goods, the value segment is shrinking rapidly."

"Significant price increases were seen in 2022 and more are expected in 2023, which may slow the premiumisation trend as price barriers are exceeded."

*Executive Summary Report 2023, New Zealand*

Base: Those who buy wine in the off-trade or on-trade;
↑/↓: Statistically significantly higher/lower than the previous wave(s) at a 95% confidence level
Source: IWSR Vinitrac®, October 2017 (n=1,000), October 2020 (n=1,002) and November 2023 (n=1,017) New Zealand regular wine drinkers

# 4. Both red and white wine consumption down

## The proportion of regular wine drinkers who have consumed either red or white wine has declined significantly since 2017. This trend is further reflected in the declining volumes of still wine sold overall

**Alcoholic beverage repertoire: Top 15 tracking**

Percentage who have drunk the following beverages in the past 12 months

| Ranking '23 | | 2017 (n=1,000) | 2020 (n=1,002) | 2023 (n=1,017) | Tracking vs. '17 | Tracking vs. '20 |
|---|---|---|---|---|---|---|
| 1 | White wine | 86% | 85% | 81% | ↓ | ↓ |
| 2 | Red wine | 79% | 76% | 74% | ↓ | → |
| 3 | Beer | 67% | 66% | 64% | → | → |
| 4 | Rosé wine | 39% | 48% | 45% | ↑ | → |
| 5 | Sparkling wine from New Zealand | 48% | 48% | 41% | ↓ | ↓ |
| 6 | Vodka | 34% | 37% | 35% | → | → |
| 7 | Whisky / Whiskey | 37% | 34% | 34% | → | → |
| 8= | Craft beer | 33% | 34% | 33% | → | → |
| 8= | Gin | 26% | 33% | 33% | ↑ | → |
| 10 | Cider | 41% | 39% | 30% | ↓ | ↓ |
| 11 | Pre-mixed / ready to drink alcoholic beverages | 20% | 29% | 29% | ↑ | → |
| 12= | Cocktails | 22% | 27% | 25% | → | → |
| 12= | Champagne (French Champagne) | 25% | 27% | 25% | → | → |
| 14 | Prosecco | 10% | 21% | 24% | ↑ | → |
| 15 | Rum | 23% | 24% | 22% | → | → |

Base: All New Zealand regular wine drinkers (n≥1,000)
↑/↓: Statistically significantly higher/lower than the previous wave(s) at a 95% confidence level
Source: IWSR Vinitrac®, October 2017 (n=1,000), October 2020 (n=1,002), November 2023 (n=1,017) New Zealand regular wine drinkers

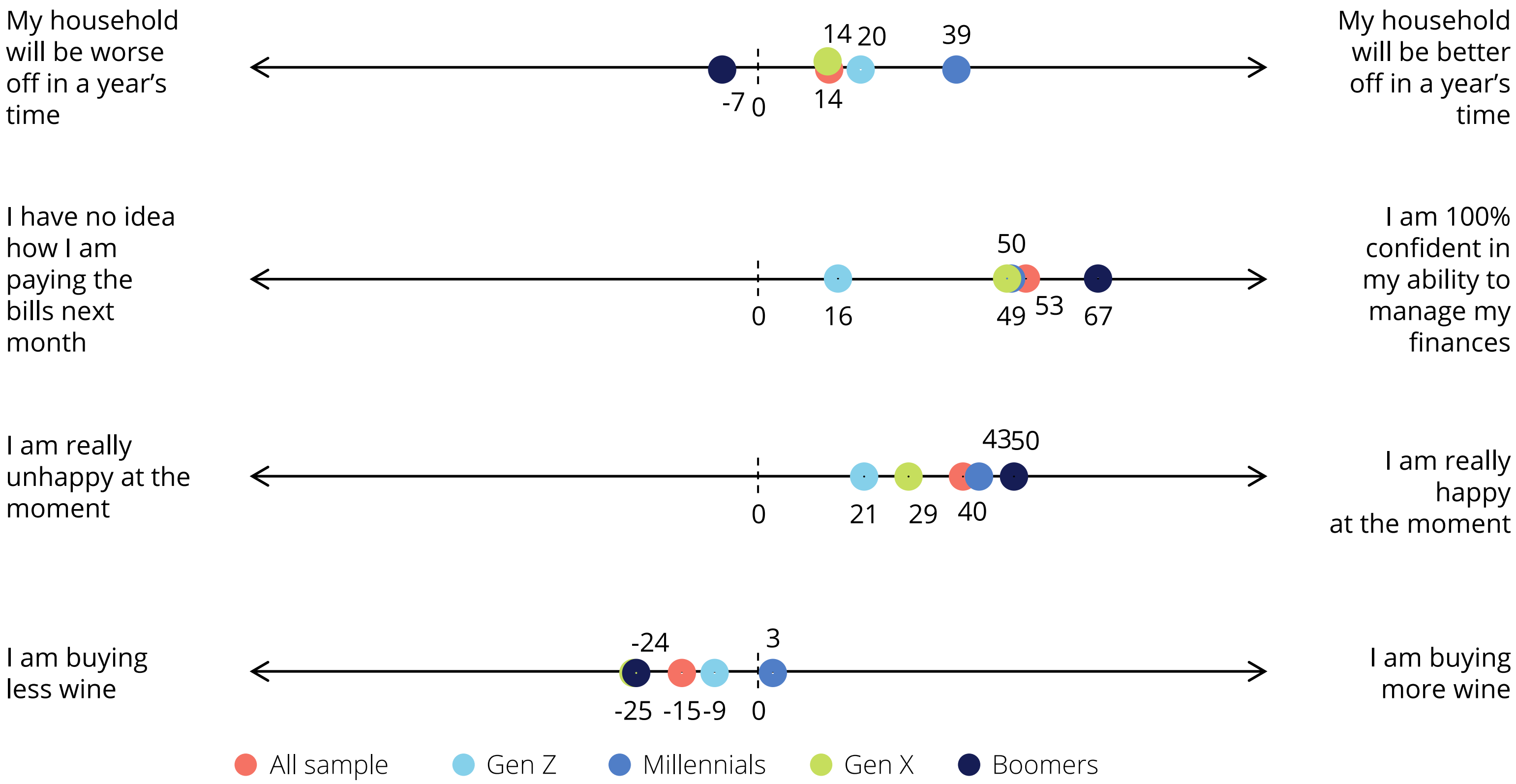
### Market context

"Still wine's [volume sold in New Zealand] declined slightly faster than expected and will continue to decline in line with the 'less but better quality' trend."

*Executive Summary Report 2023, New Zealand*

# 5. Positive consumer outlook

## Regular wine drinkers are positive in their financial outlooks, though they are likely to be buying less wine. Millennials, however, are confident and likely to be maintain their wine buying




Market context

"House prices fell consistently across 2022 but remain ahead of their pre-pandemic levels. Combined with high interest rates, increased costs of living and a decline in GDP in the last quarter, the year has been economically challenging."

"Unemployment levels remain low, but although wages have increased, they have not kept pace with recent inflation levels, shrinking disposable incomes."

*Executive Summary Report 2023, New Zealand*

Base: All New Zealand regular wine drinkers (n=1,017)
Source: IWSR Vinitrac®, New Zealand, November 2023 (n=1,017), New Zealand regular wine drinkers

# 6. Millennials are highly involved with wine

## Almost 60% of Millennials say they have a strong interest in wine, which is significantly higher than all New Zealand regular wine drinkers, highlighting Millennials as a highly engaged group in the wine category

**Attitudes towards wine by generation**

Percentage who 'agree' or 'strongly agree' with the following statements

| | All New Zealand Regular Wine Drinkers (n=1,017) | Gen Z LDA-26 (n=92) | Millennials 27-42 (n=292) | Gen X 43-58 (n=263) | Boomers 59+ (n=370) |
|---|---|---|---|---|---|
| High involvement | 27% | 17% | 35% | 27% | 23% |
| Medium involvement | 46% | 39% | 47% | 46% | 48% |
| Low involvement | 27% | 44% | 18% | 27% | 29% |

**Involvement and perceived expertise in wine: Tracking**

Percentage who 'agree' or 'strongly agree' with the following statements

| Ranking '23 | All New Zealand Regular Wine Drinkers (n=1,017) | Gen Z LDA-26 (n=92) | Millennials 27-42 (n=292) | Gen X 43-58 (n=263) | Boomers 59+ (n=370) |
|---|---|---|---|---|---|
| I have a strong interest in wine | 44% | 32% | 58% | 44% | 37% |
| I feel competent about my knowledge of wine | 43% | 29% | 49% | 40% | 43% |

Base: All New Zealand regular wine drinkers (n=1,017)
%/%: Statistically significantly higher/lower than all regular wine drinkers at a 95% confidence level
Source: IWSR Vinitrac®, New Zealand, November 2023 (n=1,017), New Zealand regular wine drinkers

# Management summary: tracking metrics

## The alcohol repertoires of regular wine drinkers have evolved in past six years and a significantly smaller proportion of them are either drinking or purchasing wine from the leading countries or regions of origins

### Top alcoholic beverages

Percentage who have drunk the following beverages in the past 12 months

| | 2017 | 2023 | Tracking |
|---|---|---|---|
| White wine | 86% | 81% | ↓ |
| Red wine | 79% | 74% | ↓ |
| Beer | 67% | 64% | → |
| Rosé wine | 39% | 45% | ↑ |
| Sparkling wine from New Zealand | 48% | 41% | ↓ |

### Top country of origin

Percentage who have drunk wine from the following places in the past six months

| | 2017 | 2023 | Tracking |
|---|---|---|---|
| New Zealand | 93% | 89% | ↓ |
| Australia | 61% | 55% | ↓ |
| France | 23% | 22% | → |
| Italy | 15% | 17% | → |
| South Africa | 13% | 11% | → |

### Top region of origin

Percentage who have drunk wine from the following regions in the past six months

| | 2017 | 2023 | Tracking |
|---|---|---|---|
| Marlborough | 46% | 35% | ↓ |
| Hawke’s Bay | 36% | 31% | ↓ |
| Central Otago | 25% | 22% | → |
| Martinborough | 15% | 14% | → |
| Barossa Valley | 13% | 11% | → |

### Top wine brands

Percentage who have bought the following brands in the past three months

| | 2017 | 2023 | Tracking |
|---|---|---|---|
| Jacob's Creek | 24% | 24% | → |
| Oyster Bay | 17% | 21% | ↑ |
| Villa Maria | 21% | 21% | → |
| The Ned | 12% | 15% | → |
| Church Road | 14% | 15% | → |

Base: All New Zealand regular wine drinkers (n≥1,000)
↑/↓: Statistically significantly higher/lower than the previous wave(s) at a 95% confidence level
Source: IWSR Vinitrac®, October 2017 (n=1,000) and November 2023 (n=1,017) New Zealand regular wine drinkers

# Management summary: tracking metrics

## A larger proportion of New Zealand's regular wine drinkers are drinking sweeter and lighter-ABV Moscato wines than in 2017, with the white varietal bucking the trend of declining consumption

### Top red varietals

Percentage who have drunk the following varietals in the past six months

| | 2017 | 2023 | Tracking |
|---|---|---|---|
| Pinot Noir | 55% | 49% | ↓ |
| Merlot | 51% | 46% | ↓ |
| Shiraz / Syrah | 42% | 35% | ↓ |
| Cabernet Sauvignon | 36% | 33% | → |
| Cabernet Sauvignon / Merlot Blend | 32% | 27% | ↓ |

### Top white varietals

Percentage who have drunk the following varietals in the past six months

| | 2017 | 2023 | Tracking |
|---|---|---|---|
| Sauvignon Blanc | 63% | 55% | ↓ |
| Pinot Grigio / Pinot Gris | 55% | 50% | ↓ |
| Chardonnay | 45% | 40% | ↓ |
| Riesling | 31% | 26% | ↓ |
| Moscato | 14% | 20% | ↑ |

### Top wine-buying channels

Percentage who have bought wine from the following channels in the past six months

| | 2017 | 2023 | Tracking |
|---|---|---|---|
| In a supermarket | 90% | 82% | ↓ |
| Traditional liquor store | 34% | 37% | → |
| Local hotel or bottle shop | 17% | 19% | → |
| From a supermarket website | n/a | 15% | n/a |
| From a specialist wine shop | 11% | 14% | → |

### Top wine-buying retailers

Percentage who mainly use the following retailers to buy wine

| | 2017 | 2023 | Tracking |
|---|---|---|---|
| Countdown | 52% | 51% | → |
| Pak 'n Save | 41% | 37% | → |
| New World | 43% | 34% | ↓ |
| Liquorland | 15% | 23% | ↑ |
| Super Liquor | 8% | 14% | ↑ |

Base: All New Zealand regular wine drinkers (n≥1,000) ; n/a = tracking unavailable for this wave
↑/↓: Statistically significantly higher/lower than the previous wave(s) at a 95% confidence level
Source: IWSR Vinitrac®, October 2017 (n=1,000) and November 2023 (n=1,017) New Zealand regular wine drinkers

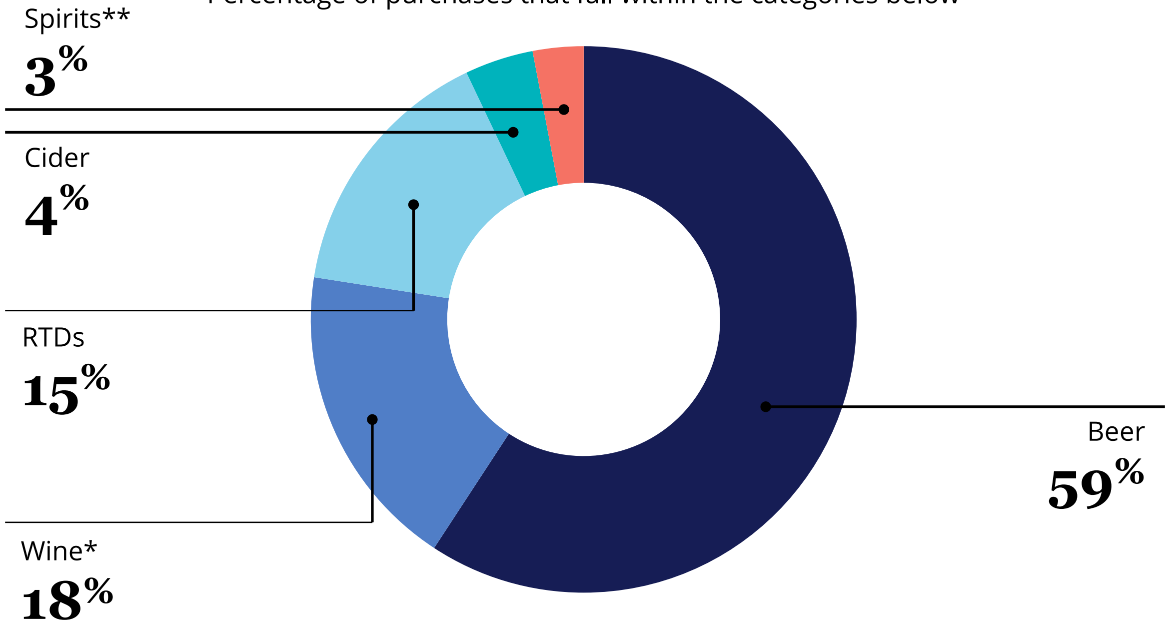
# Market Data

# Alcohol market share by category

## Wine is New Zealand's second most popular alcoholic beverage, with volume share of 18% of the total market; the category declined by 1% from 2017–22 and is forecast to continue to fall in future, though more slowly

### Total beverage alcohol market share by category

Percentage of purchases that fall within the categories below




### Total beverage alcohol market volumes by category

000s 9-litre cases

| | 2021 | 2022 | CAGR 17-22 | CAGR F 22-27 |
|---|---|---|---|---|
| Total beverage alcohol | 54,708.07 | 54,200.49 | 0.9% | 0.3% |
| Beer | 31,773.11 | 32,101.67 | 0.2% | -0.5% |
| Wine* | 10,500.83 | 9,887.14 | -1.0% | -0.4% |
| RTDs | 8,295.05 | 8,383.65 | 6.5% | 3.7% |
| Cider | 2,531.67 | 2,200.56 | -0.1% | 1.1% |
| Spirit** | 1,607.41 | 1,627.48 | 6.2% | 1.5% |

*Wine includes still wine, sparkling wine, fortified wine and light aperitifs

**Spirits includes whisky, gin and genever, vodka, agave-based spirits, national spirits, rum

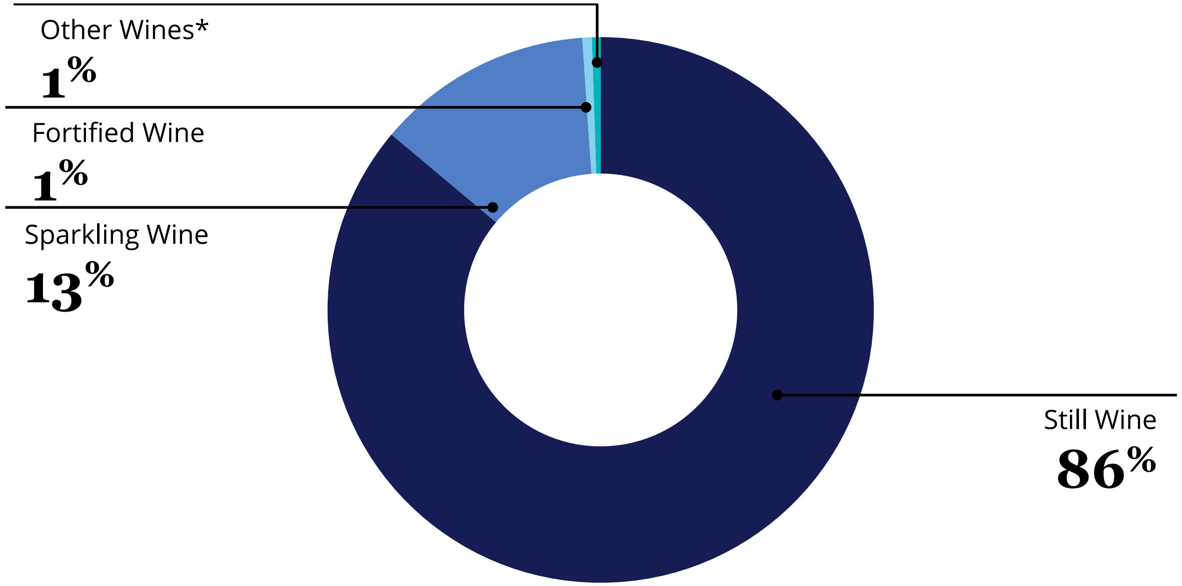
Source: IWSR

# Total wine market volumes

Still wine accounts for 86% of total wine volume in the New Zealand market; volumes of both still and sparkling wine fell from 2017–22, although sparkling is forecast to recover in the next five years

**Total wine share by category****

Percentage of purchases that fall within the categories below




**Total wine volumes by category**

000s 9-litre cases

| | 2021 | 2022 | CAGR 17-22 | CAGR F 22-27 |
|---|---|---|---|---|
| Total Wine | 10,500.83 | 9,887.14 | -1.0% | -0.4% |
| Still Wine | 9,047.80 | 8,510.90 | -1.1% | -0.6% |
| Sparkling Wine | 1,329.41 | 1,265.94 | -0.1% | 0.5% |
| Fortified Wine | 66.07 | 55.27 | -7.9% | -0.2% |
| Other Wines* | 53.00 | 51.00 | 1.4% | 2.1% |
| Light Aperitifs | 4.55 | 4.03 | 4.4% | 1.5% |

*Other Wines includes non-grape based wines
**Light aperitifs omitted from pie chart due to small market share (<1%)
Source: IWSR

# Still wine volumes by origin

## Over two-thirds of all wine sold in New Zealand is domestically produced, though volumes declined between 2017 and 2022; a fifth of wine sold in the market comes from Australia

**Total still wine volumes and market share by origin**

000s 9-litre cases

| | | 2021 | 2022 | CAGR 17-22 | CAGR F 22-27 | Market Share |
|---|---|---|---|---|---|---|
| | Total | 9,047.80 | 8,510.90 | -1.1% | -0.6% | |
| 1 | New Zealand | 6,478.75 | 6,020.20 | -2.3% | -0.9% | 71% |
| 2 | Australian | 1,998.10 | 1,955.85 | 2.4% | -0.4% | 23% |
| 3 | Italian | 217.35 | 205.00 | 1.5% | 0.7% | 2% |
| 4 | South African | 122.95 | 107.20 | -7.6% | 3.7% | 1% |
| 5 | French | 77.00 | 72.45 | 12.9% | 1.4% | 1% |
| 6 | Argentinian | 50.60 | 49.10 | 5.8% | 3.1% | 1% |
| 7 | Spanish | 42.95 | 41.15 | 6.5% | 1.1% | 0% |
| 8 | Chilean | 18.40 | 18.60 | 8.3% | 2.4% | 0% |
| 9 | US | 16.85 | 16.50 | 2.6% | 3.9% | 0% |
| 10 | International* | 12.50 | 13.00 | 13.2% | 10.1% | 0% |

*International refers to wine where grapes are from multiple countries of origin
Source: IWSR

# Still wine retail price by origin

## The retail price of a standard 75cl bottle of wine in New Zealand increased by 2.6% from 2017–22; the average price points for domestically produced and Australian wine increased by 3% and 1.2% respectively

**Historic and forecast growth: Retail price**

Five-year CAGR % calculated using a variable exchange rate

| | | Retail price per 0.75l 2022 (US$) | CAGR 17-22 | CAGR F 22-27 |
|---|---|---|---|---|
| | Total | 9.66 | 2.6% | 0.9% |
| 1 | New Zealand | 9.72 | 3.0% | 1.1% |
| 2 | Australian | 9.02 | 1.2% | 0.4% |
| 3 | Italian | 11.15 | 2.3% | 0.4% |
| 4 | South African | 9.13 | 1.5% | -0.5% |
| 5 | French | 16.26 | -0.8% | 0.4% |
| 6 | Argentinian | 10.55 | 2.5% | 1.2% |
| 7 | Spanish | 11.80 | 2.1% | 0.0% |
| 8 | Chilean | 9.49 | 2.9% | 0.0% |
| 9 | US | 12.90 | 1.2% | 0.5% |
| 10 | International* | 7.99 | 7.0% | 1.4% |

*International refers to wine where grapes are from multiple countries of origin

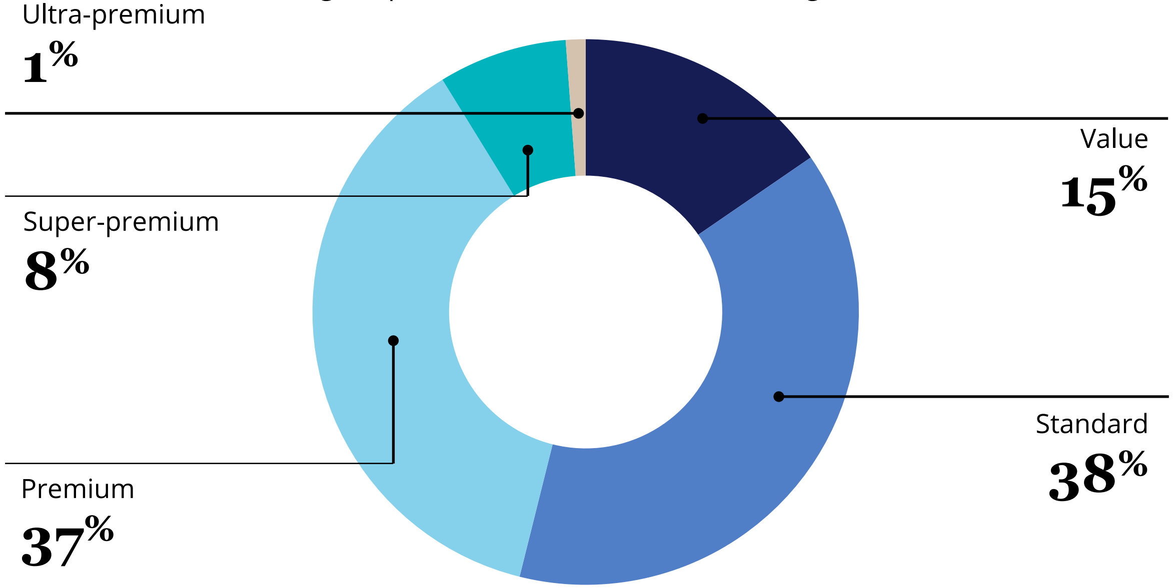
Source: IWSR

# Still wine by price band

## Premium wine is catching-up with standard wine; growth has been concentrated in the premium-and-above segments, a trend that is forecast to continue

**Still wine by price band***

Percentage of purchases that fall within the categories below




**Still wine by price band**

000s 9-litre cases

| | 2021 | 2022 | CAGR 17-22 | CAGR F 22-27 |
|---|---|---|---|---|
| Value (under NZD 10.00) | 1509.25 | 1306.75 | -5.6% | -9.8% |
| Standard (between NZD 10.00 and 14.99) | 3518.30 | 3271.85 | -3.5% | -0.7% |
| Premium (between NZD 15.00 and 19.99) | 3262.30 | 3165.70 | 2.1% | 1.9% |
| Super Premium (between NZD 20.00 and 29.99) | 638.85 | 645.55 | 10.0% | 2.0% |
| Ultra Premium (between NZD 30.00 and 49.99) | 97.00 | 99.20 | 7.6% | 3.0% |
| Prestige (over NZD 50.00) | 22.10 | 21.85 | 5.1% | 1.1% |

### Market context

"Total still wine will continue to decline as the premiumisation trend continues. Wines priced at under $10 will potentially disappear due to the cost of grapes and excise."

*Executive Summary Report 2023, New Zealand*

*Prestige omitted from pie chart due to small market share (less than 1%)

Source: IWSR

# Still wine consumption per capita

## Per capita wine consumption fell by 7.2% between 2021 and 2022 and now sits at 19.7 litres per person. This is an acceleration of the decline seen in the 2017–22 period

**Per capita consumption of still wine**

Litres per annum (LDA+ population)

| | | 2021 | 2022 | CAGR 17-22 | CAGR 21-22 |
|---|---|---|---|---|---|
| 1 | St. Martin and St. Maarten | 46.67 | 49.01 | 12.3% | 5.0% |
| 2 | Portugal | 43.00 | 45.71 | -0.9% | 6.3% |
| 3 | Montenegro | 41.76 | 42.62 | -0.9% | 2.0% |
| 4 | Italy | 42.16 | 39.95 | -2.8% | -5.2% |
| 5 | Slovenia | 37.63 | 37.82 | -2.8% | 0.5% |
| 6 | St. Barths | 33.89 | 37.21 | 9.3% | 9.8% |
| 7 | Switzerland | 36.14 | 34.94 | -1.5% | -3.3% |
| 8 | France | 35.71 | 33.93 | -5.2% | -5.0% |
| 9 | Greece | 27.95 | 33.79 | 0.5% | 20.9% |
| 10 | Hungary | 31.52 | 32.65 | 0.6% | 3.6% |
| 11 | Denmark | 33.37 | 30.99 | -1.2% | -7.1% |
| 12 | Austria | 30.93 | 30.12 | -1.3% | -2.6% |
| 13 | Turks and Caicos | 27.56 | 30.08 | -2.9% | 9.2% |
| 14 | Romania | 27.55 | 27.87 | 2.4% | 1.2% |
| 15 | US Virgin Islands | 27.78 | 27.86 | -2.6% | 0.3% |
| 27 | New Zealand | 21.30 | 19.70 | -2.7% | -7.2% |

Market context

"Per capita consumption is declining as younger people are drinking less alcohol than previous generations, and seniors are cutting back as they age."

*Executive Summary Report 2023, New Zealand*

Source: IWSR

# Sparkling wine volumes by origin

## Domestic sparkling wine accounts for 56% of total volume. Italian sparkling has seen remarkable growth and now accounts for 15% of total volume, with most of the growth coming from Prosecco

**Total sparkling wine volumes and market share by origin**

000s 9-litre cases

| | | 2021 | 2022 | CAGR 17-22 | CAGR F 22-27 | Market Share |
|---|---|---|---|---|---|---|
| | Total | 1,329.41 | 1,265.94 | -0.1% | 0.5% | |
| 1 | New Zealand | 758.35 | 705.95 | -4.0% | -2.1% | 56% |
| 2 | Italian | 175.65 | 189.03 | 23.2% | 6.5% | 15% |
| 3 | French | 186.05 | 179.65 | 6.7% | 3.1% | 14% |
| 4 | Australian | 161.50 | 154.40 | -1.8% | 0.3% | 12% |
| 5 | Spanish | 17.64 | 13.35 | 7.2% | 1.7% | 1% |
| 6 | German | 13.35 | 10.00 | -4.4% | 3.7% | 1% |
| 7 | International* | 6.40 | 6.00 | 0.3% | 0.0% | 0% |
| 8 | South African | 8.65 | 5.88 | -11.8% | 2.8% | 0% |
| 9 | Chilean | 1.57 | 1.48 | n/a | 2.8% | 0% |
| 10 | Argentinian | 0.25 | 0.20 | 14.9% | -5.6% | 0% |

Market context

"[Non-Champagne] sparkling wines are dominated by locally produced wines, sales of which are plateauing as consumers look to experiment."

*Executive Summary Report 2023, New Zealand*

*International refers to wine where grapes are from multiple countries of origin
Source: IWSR

# Sparkling wine retail price by origin

## There has been an increase in the retail price of sparkling wine in New Zealand for most countries of origin; only sparkling wines from France and 'international' wines saw retail prices decline

**Historic and forecast growth for sparkling wine: Retail price**

Five-year CAGR % calculated using a variable exchange rate

| | | Retail price per 0.75l 2022 (US$) | CAGR 17-22 | CAGR F 22-27 |
|---|---|---|---|---|
| | Total | 13.98 | 3.2% | 0.8% |
| 1 | New Zealand | 10.85 | 2.8% | 1.1% |
| 2 | Italian | 11.19 | 1.6% | 0.1% |
| 3 | French | 35.55 | -0.9% | -1.0% |
| 4 | Australian | 7.62 | 3.4% | 0.3% |
| 5 | Spanish | 10.73 | 2.2% | 1.0% |
| 6 | German | 9.94 | 3.7% | 0.2% |
| 7 | International* | 6.34 | -7.8% | 0.0% |
| 8 | South African | 9.71 | 0.2% | 0.0% |
| 9 | Chilean | 6.46 | n/a | 0.0% |
| 10 | Argentinian | 19.01 | 0.0% | 0.0% |

*International refers to wine where grapes are from multiple countries of origin

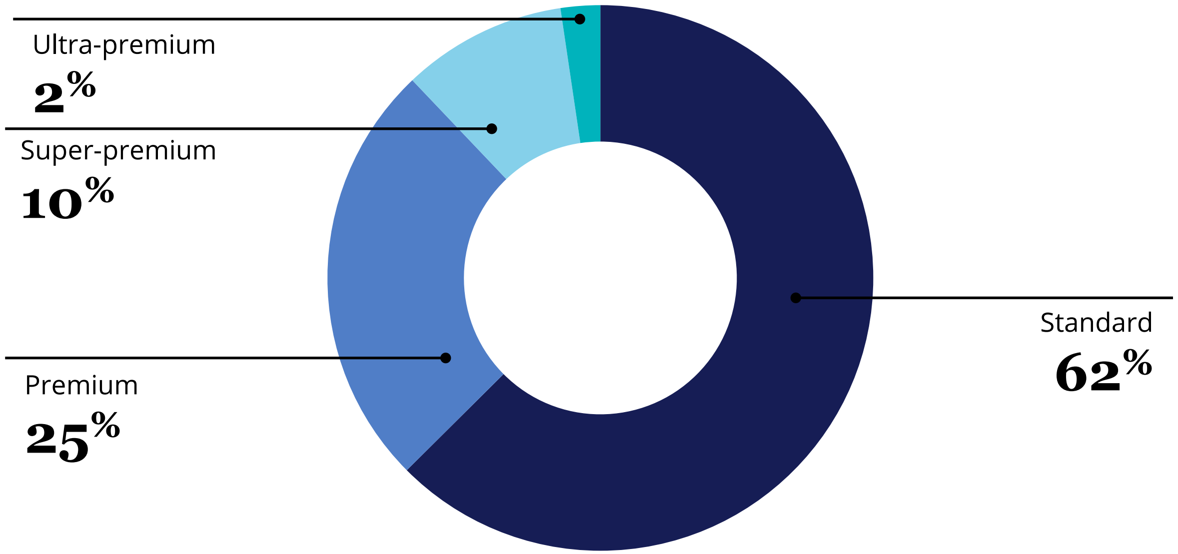
Source: IWSR

# Sparkling wine by price band

## There has been strong growth in sparkling wine sold at premium-and-above price points, and this trend is expected to continue

**Other sparkling wine* by price brand****

Percentage of purchases that fall within the categories below




**Other sparkling wine* volumes by price band**

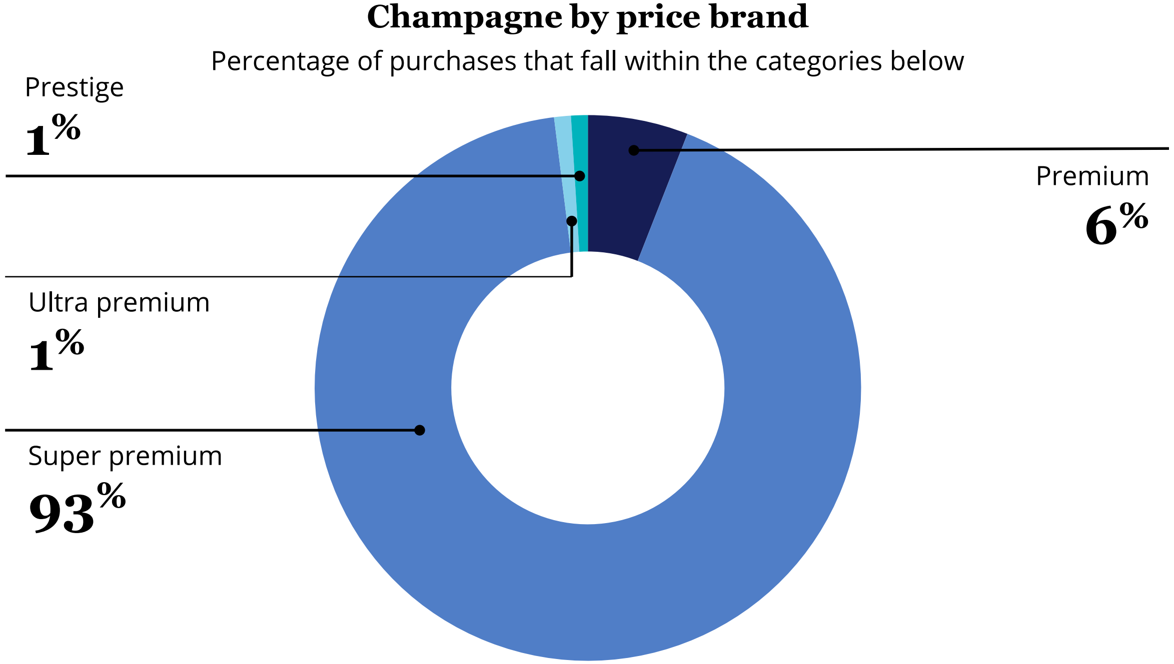
000s 9-litre cases

| | 2021 | 2022 | CAGR 17-22 | CAGR F 22-27 |
|---|---|---|---|---|
| Value (under NZD 10.00) | 24.10 | 9.70 | -19.1% | 0.1% |
| Standard (between NZD 10.00 and 14.99) | 748.32 | 706.43 | -3.0% | -1.4% |
| Premium (between NZD 15.00 and 19.99) | 297.30 | 294.93 | 5.7% | 2.6% |
| Super Premium (between NZD 20.00 and 29.99) | 108.60 | 110.03 | 4.7% | 3.4% |
| Ultra Premium (over NZD 30.00) | 21.94 | 26.40 | 13.2% | 7.1% |

*Sparkling wine includes all sparkling wine types except Champagne, and includes low and no sparkling wine types
**Value omitted from pie chart due to small market share (less than 1%)
Source: IWSR

# Champagne by price band

## The bulk of Champagne sold in New Zealand sits within the NZD50–99.99 range; all price bands have seen growth, which is forecast to continue




**Champagne volumes by price band**

000s 9-litre cases

| | 2021 | 2022 | CAGR 17-22 | CAGR F 22-27 |
|---|---|---|---|---|
| Premium (under NZD 50.00) | 6.80 | 7.40 | 3.1% | 2.6% |
| Super Premium (NZD 50.00 to 99.99) | 120.85 | 109.60 | 4.6% | 1.5% |
| Ultra Premium (NZD 100.00 to 199.99) | 0.60 | 0.65 | 5.4% | 6.7% |
| Prestige (NZD 200.00 and over) | 0.90 | 0.80 | 4.2% | 2.4% |

Source: IWSR

# Sparkling wine consumption per capita

## New Zealanders drink on average 2.9 litres of sparkling wine per capita. This is declining, partly due to reduced volumes in the value and standard segments

**Per capita consumption of sparkling wine**

Litres per annum (LDA+ population)

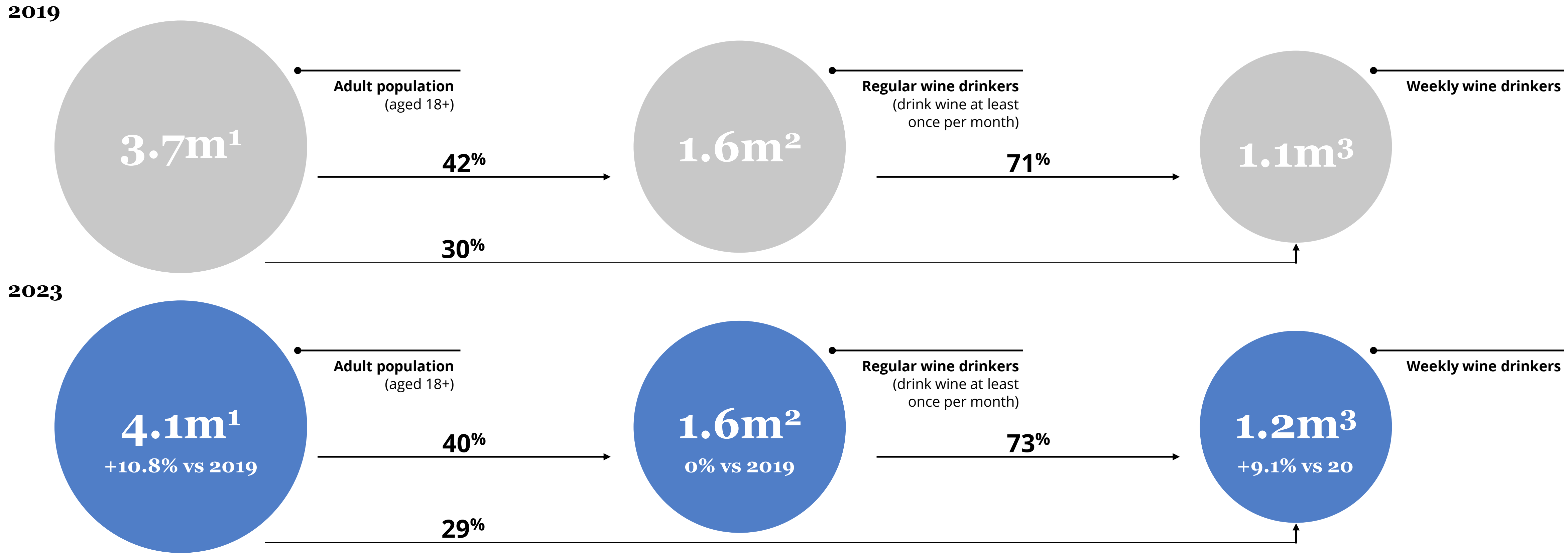
| | | 2021 | 2022 | CAGR 17-22 | CAGR 21-22 |
|---|---|---|---|---|---|
| 1 | St. Barths | 12.47 | 13.58 | 13.1% | 8.9% |
| 2 | St. Martin and St. Maarten | 6.29 | 8.34 | 21.7% | 32.6% |
| 3 | Italy | 7.87 | 7.38 | -1.2% | -6.2% |
| 4 | Turks and Caicos | 5.27 | 6.50 | -2.4% | 23.4% |
| 5 | Germany | 5.31 | 5.51 | -1.9% | 3.7% |
| 6 | Lithuania | 4.88 | 5.06 | 7.3% | 3.6% |
| 7 | Latvia | 4.47 | 4.89 | 2.6% | 9.4% |
| 8 | France | 4.73 | 4.86 | -1.3% | 2.7% |
| 9 | Guadeloupe | 4.17 | 4.81 | -1.8% | 15.5% |
| 10 | Martinique | 4.22 | 4.43 | -4.6% | 4.8% |
| 11 | Estonia | 4.08 | 4.34 | 4.0% | 6.3% |
| 12 | Belgium and Luxembourg | 4.28 | 4.27 | -1.5% | -0.2% |
| 13 | Austria | 3.44 | 3.54 | 0.3% | 2.9% |
| 14 | Switzerland | 3.23 | 3.33 | 0.9% | 3.0% |
| 15 | Cayman Islands | 3.13 | 3.31 | 2.1% | 5.8% |
| | | | | | |
| 19 | New Zealand | 3.10 | 2.90 | -1.6% | -6.1% |

Source: IWSR

# Market Demographics

# New Zealand regular wine drinkers

## New Zealand's population of regular wine drinkers has not grown in line with that of the overall adult population, due to lower participation in the category



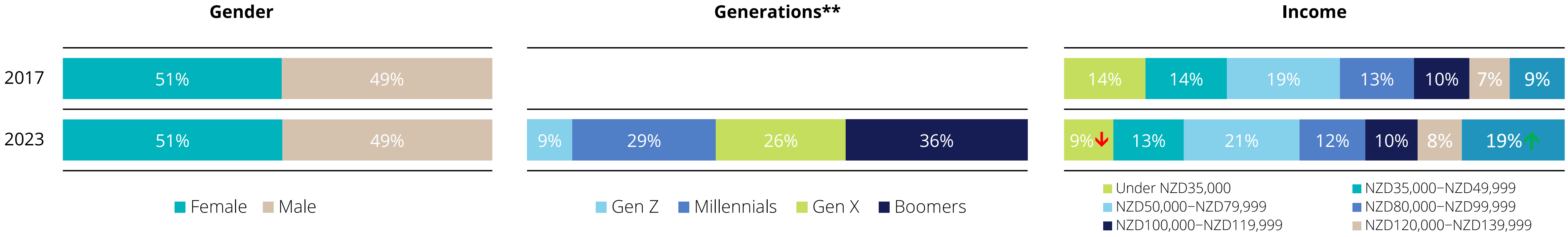

1 National Statistics New Zealand
2 IWSR online calibration study, September 2019 (n=1,030) and September 2023 (n=1,004) New Zealand adults. Wine=still light wine (red, white, rosé)
3, Vinitrac® New Zealand October 2020 and November 2023 (n≥1,002) New Zealand regular wine drinkers

# Demographics

## There has been a shift from lower-income to higher-income drinkers, with the highest bracket now accounting for 19% of New Zealand's regular wine drinkers

**Q New Zealand regular wine drinkers*: who are they?**

All regular wine drinkers in New Zealand in 2023 compared with 2017




**Regions**

| | 2017 | 2023 | Tracking |
|---|---|---|---|
| Auckland | 38% | 37% | → |
| Wellington | 11% | 9% | → |
| Rest of North Island | 29% | 28% | → |
| Canterbury | 13% | 14% | → |
| Rest of South Island | 9% | 11% | → |

Base: All New Zealand regular wine drinkers (n≥1,000);
↑/↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: IWSR Vinitrac®, October 2017 (n=1,000), November 2023 (n=1,017) New Zealand regular wine drinkers
*Definition of RWD: Those respondents that drink wine once a month; **Tracking not available for generations due to change to question;

# Drinking Repertoire

# Drinking repertoire

## A smaller proportion of regular wine drinkers than in 2017 are drinking still wine or domestic sparkling wine. The proportion drinking rosé wine or Prosecco has increased, which highlights evolving preferences

### Alcoholic beverage repertoire: Top 15 tracking

Percentage who have drunk the following beverages in the past 12 months

| Ranking '23 | | 2017 (n=1,000) | 2020 (n=1,002) | 2023 (n=1,017) | Tracking vs. '17 | Tracking vs. '20 |
|---|---|---|---|---|---|---|
| 1 | White wine | 86% | 85% | 81% | ↓ | ↓ |
| 2 | Red wine | 79% | 76% | 74% | ↓ | → |
| 3 | Beer | 67% | 66% | 64% | → | → |
| 4 | Rosé wine | 39% | 48% | 45% | ↑ | → |
| 5 | Sparkling wine from New Zealand | 48% | 48% | 41% | ↓ | ↓ |
| 6 | Vodka | 34% | 37% | 35% | → | → |
| 7 | Whisky / Whiskey | 37% | 34% | 34% | → | → |
| 8= | Craft beer | 33% | 34% | 33% | → | → |
| 8= | Gin | 26% | 33% | 33% | ↑ | → |
| 10 | Cider | 41% | 39% | 30% | ↓ | ↓ |
| 11 | Pre-mixed / ready to drink alcoholic beverages | 20% | 29% | 29% | ↑ | → |
| 12= | Cocktails | 22% | 27% | 25% | → | → |
| 12= | Champagne (French Champagne) | 25% | 27% | 25% | → | → |
| 14 | Prosecco | 10% | 21% | 24% | ↑ | → |
| 15 | Rum | 23% | 24% | 22% | → | → |

Base: All New Zealand regular wine drinkers (n≥1,000); =Represents equal ranking
↑/↓: Statistically significantly higher/lower than the previous wave(s) at a 95% confidence level
Source: IWSR Vinitrac®, October 2017 (n=1,000), October 2020 (n=1,002) and November 2023 (n=1,017) New Zealand regular wine drinkers

### Market context

"Still wine has begun to decline in recent years, as the growing health and wellness trend encourages consumers to cut back."

"With its approachable style, Prosecco has grown strongly in recent years."

*Executive Summary Report 2023, New Zealand*

# Varietal consumption (1/2)

## The white varietal preferences of New Zealand's regular wine drinkers are changing. Consumption of the top four varieties is declining; Moscato, Sémillon and white blends have higher consumption levels than in 2017

### White varietal consumption: Tracking

Percentage who have drunk the following varietals or wine types in the past six months

| Ranking '23 | | 2017 (n=1,000) | 2020 (n=1,002) | 2023 (n=1,017) | Tracking vs. '17 | Tracking vs. '20 |
|---|---|---|---|---|---|---|
| 1 | Sauvignon Blanc | 63% | 60% | 55% | ↓ | ↓ |
| 2 | Pinot Grigio / Pinot Gris | 55% | 49% | 50% | ↓ | → |
| 3 | Chardonnay | 45% | 44% | 40% | ↓ | ↓ |
| 4 | Riesling | 31% | 31% | 26% | ↓ | ↓ |
| 5 | Moscato | 14% | 18% | 20% | ↑ | → |
| 6 | Sémillon / Sauvignon Blanc Blend | 9% | 14% | 12% | ↑ | → |
| 7= | White blend | 8% | 11% | 11% | ↑ | → |
| 7= | Gewürztraminer | 15% | 12% | 11% | ↓ | → |
| 9 | Viognier | 6% | 6% | 7% | → | → |
| 10 | Chenin Blanc | 5% | 5% | 6% | → | → |
| 11= | Sémillon | 3% | 5% | 4% | → | → |
| 11= | Albariño | 2% | 3% | 4% | ↑ | → |
| 11= | Verdelho | 2% | 2% | 4% | ↑ | ↑ |
| 14= | Torrontés | 1% | 2% | 3% | ↑ | → |
| 14= | Grüner Veltliner | 1% | 2% | 3% | ↑ | → |
| 14= | Colombard | 1% | 2% | 3% | ↑ | → |

Base: All New Zealand regular wine drinkers (n≥1,000); =Represents equal ranking
↑/↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: IWSR Vinitrac®, October 2017 (n=1,000), October 2020 (n=1,002) and November 2023 (n=1,017) New Zealand regular wine drinkers

# Varietal consumption (2/2)

## The proportion of regular wine drinkers consuming the top red varietals Pinot Noir and Merlot is down significantly from 2017, as they increasingly turn to lesser-consumed red varietals

**Red varietal consumption: Tracking**

Percentage who have drunk the following varietals or wine types in the past six months

| Ranking '23 | | 2017 (n=1,000) | 2020 (n=1,002) | 2023 (n=1,017) | Tracking vs. '17 | Tracking vs. '20 |
|---|---|---|---|---|---|---|
| 1 | Pinot Noir | 55% | 50% | 49% | ↓ | → |
| 2 | Merlot | 51% | 47% | 46% | ↓ | → |
| 3 | Shiraz / Syrah | 42% | 37% | 35% | ↓ | → |
| 4 | Cabernet Sauvignon | 36% | 32% | 33% | → | → |
| 5 | Cabernet Sauvignon / Merlot Blend | 32% | 27% | 27% | ↓ | → |
| 6= | Red Blend | 11% | 10% | 12% | → | → |
| 6= | Malbec | 11% | 11% | 12% | → | → |
| 8 | Tempranillo | 5% | 5% | 8% | ↑ | ↑ |
| 9 | Cabernet Franc | 5% | 5% | 7% | → | → |
| 10= | Pinotage | 5% | 6% | 6% | → | → |
| 10= | Grenache | 5% | 5% | 6% | → | → |
| 12 | Sangiovese | 4% | 5% | 5% | → | → |
| 13= | Zinfandel | 3% | 4% | 4% | ↑ | → |
| 13= | Carménère | 2% | 2% | 4% | ↑ | ↑ |
| 13= | Gamay | 2% | 3% | 4% | ↑ | → |

Base: All New Zealand regular wine drinkers (n≥1,000); =Represents equal ranking

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

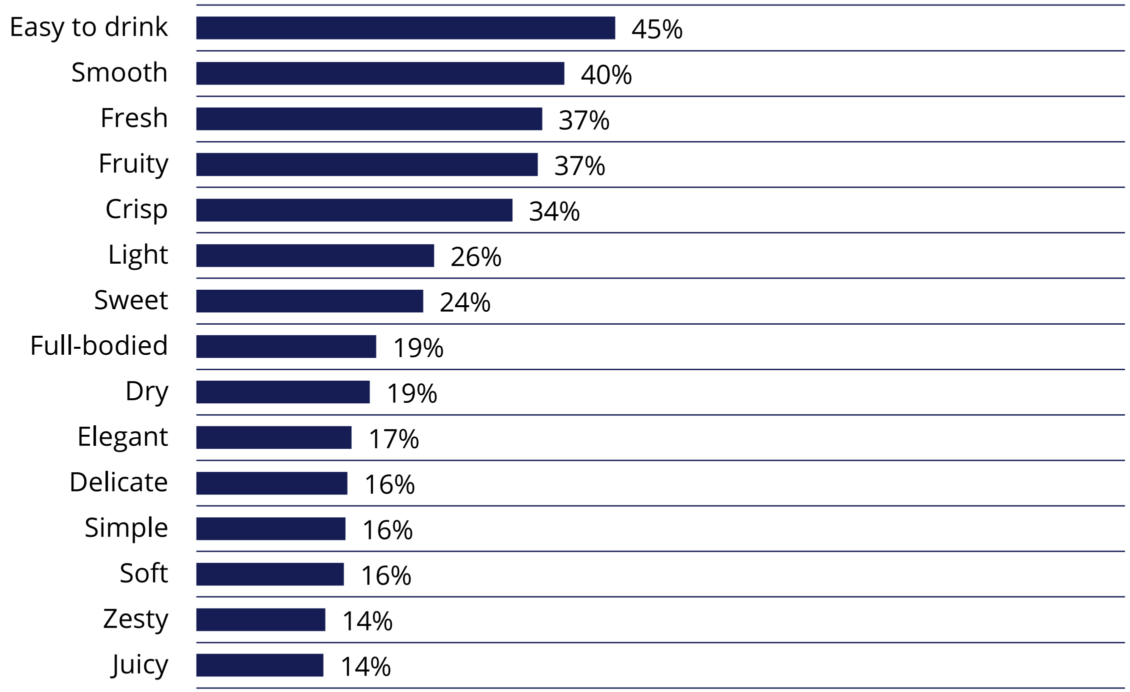
Source: IWSR Vinitrac®, October 2017 (n=1,000), October 2020 (n=1,002) and November 2023 (n=1,017) New Zealand regular wine drinkers

# Ideal wine attributes

## New Zealand's regular wine drinkers have a diverse set of ideal attributes. 'Easy to drink' is ranked top for white wine, followed by 'smooth', 'fresh' and 'fruity'. 'Smooth' and 'full-bodied' are the ideal red attributes

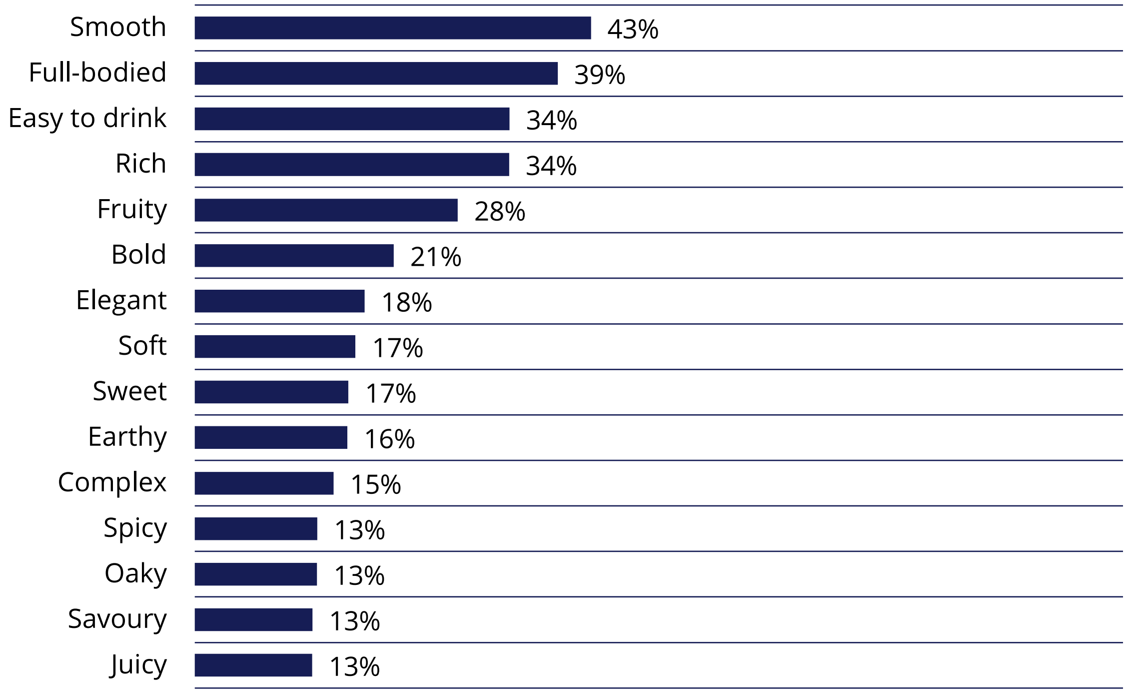
### Ideal white wine attributes: Top 15

Percentage who select each description for their ideal white wine




### Ideal red wine attributes: Top 15

Percentage who select each description for their ideal red wine



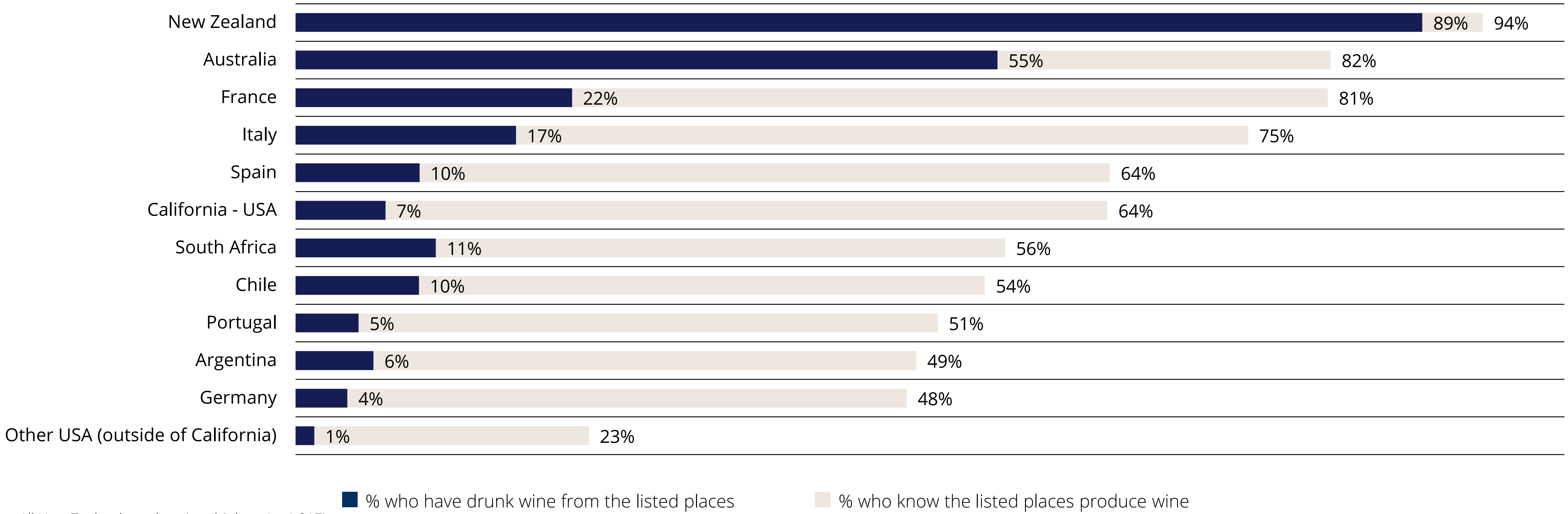

Base: All New Zealand regular wine drinkers (n=1,017)
Source: IWSR Vinitrac®, New Zealand, November 2023 (n=1,017), New Zealand regular wine drinkers

# Country of origin awareness and consumption

## Nine in regular wine drinkers consume domestic wine, which leads consumption; Australia is next on 55%. Other countries have lower consumption-to-awareness ratios, possibly due to price and availability

**Country of origin: Top 15 awareness and consumption levels**

Percentage of those who know of or have drunk wine from the following places in the past six months




Base: All New Zealand regular wine drinkers (n=1,017)
Source: IWSR Vinitrac®, New Zealand, November 2023 (n=1,017), New Zealand regular wine drinkers

# Country of origin awareness

## Levels of awareness are generally lower than in 2017, but the trend is reversing as California, Portugal and Argentina have all seen a rebound since 2020

**Country of origin awareness: Tracking**

Percentage of those who know the following places produce wine

| Ranking '23 | | 2017 (n=1,000) | 2020 (n=1,002) | 2023 (n=1,017) | Tracking vs. '17 | Tracking vs. '20 |
|---|---|---|---|---|---|---|
| 1 | New Zealand | 96% | 95% | 94% | ↓ | → |
| 2 | Australia | 88% | 83% | 82% | ↓ | → |
| 3 | France | 85% | 78% | 81% | ↓ | → |
| 4 | Italy | 79% | 72% | 75% | → | → |
| 5= | Spain | 68% | 60% | 64% | → | → |
| 5= | California - USA | 69% | 59% | 64% | ↓ | ↑ |
| 7 | South Africa | 65% | 56% | 56% | ↓ | → |
| 8 | Chile | 59% | 53% | 54% | ↓ | → |
| 9 | Portugal | 50% | 45% | 51% | → | ↑ |
| 10 | Argentina | 49% | 44% | 49% | → | ↑ |
| 11 | Germany | 52% | 44% | 48% | → | → |
| 12 | Other USA (outside of California) | 23% | 24% | 23% | → | → |

Base: All New Zealand regular wine drinkers (n≥1,000); =Represents equal ranking

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

Source: IWSR Vinitrac®, October 2017 (n=1,000), October 2020 (n=1,002) and November 2023 (n=1,017) New Zealand regular wine drinkers

# Country of origin consumption

## Levels of consumption have been stable since 2017, except for declines in New Zealand and Australia wine. Consumption has grown significantly for several countries since 2020

### Country of origin consumption: Tracking

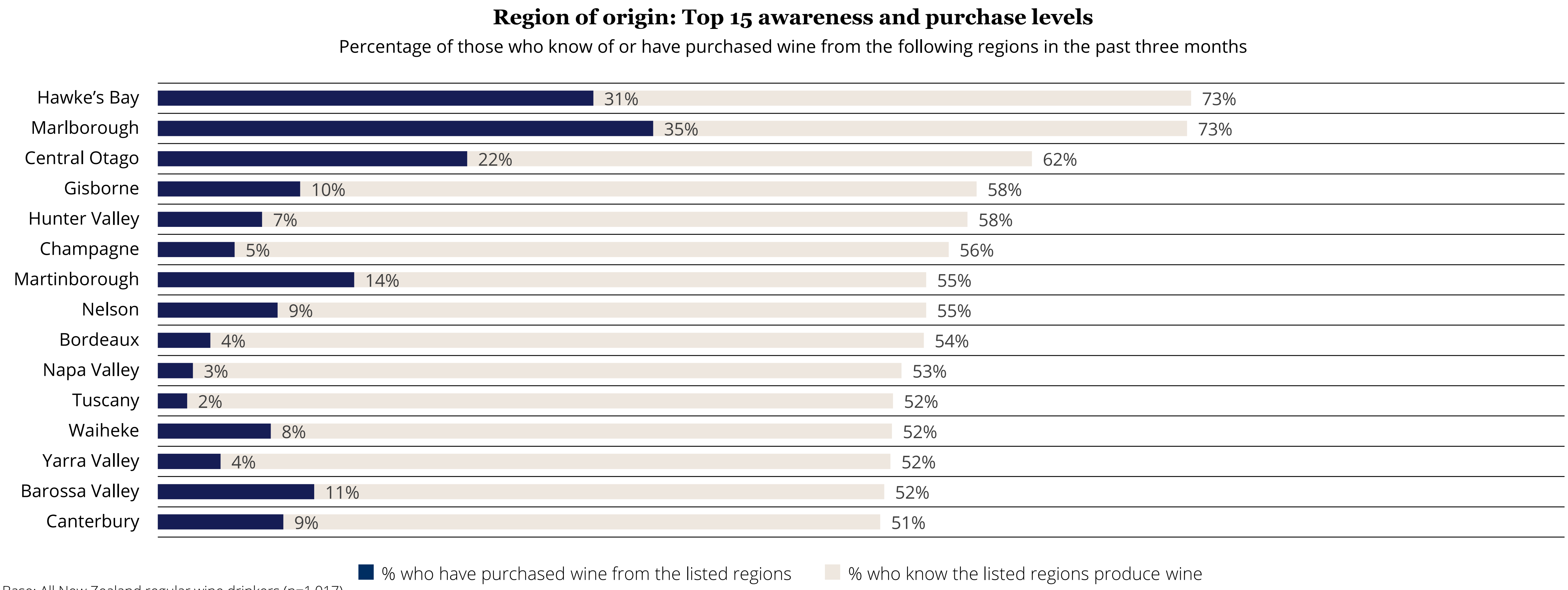
Percentage of those who have drunk wine from the following places in the past six months

| Ranking '23 | | 2017 (n=1,000) | 2020 (n=1,002) | 2023 (n=1,017) | Tracking vs. '17 | Tracking vs. '20 |
|---|---|---|---|---|---|---|
| 1 | New Zealand | 93% | 92% | 89% | ↓ | ↓ |
| 2 | Australia | 61% | 54% | 55% | ↓ | → |
| 3 | France | 23% | 19% | 22% | → | → |
| 4 | Italy | 15% | 14% | 17% | → | ↑ |
| 5 | South Africa | 13% | 8% | 11% | → | ↑ |
| 6= | Spain | 10% | 7% | 10% | → | → |
| 6= | Chile | 11% | 8% | 10% | → | → |
| 8 | California - USA | 8% | 5% | 7% | → | → |
| 9 | Argentina | 6% | 4% | 6% | → | → |
| 10 | Portugal | 3% | 3% | 5% | → | ↑ |
| 11 | Germany | 4% | 2% | 4% | → | ↑ |
| 12= | Other USA (outside of California) | 1% | 1% | 1% | → | → |

Base: All New Zealand regular wine drinkers (n≥1,000); =Represents equal ranking
↑/↓: Statistically significantly higher/lower than the previous wave(s) at a 95% confidence level
Source: IWSR Vinitrac®, October 2017 (n=1,000), October 2020 (n=1,002) and November 2023 (n=1,017) New Zealand regular wine drinkers

# Region of origin awareness and purchase

## New Zealand’s Marlborough, Hawke’s Bay and Central Otago have the highest awareness-consumption ratios




Base: All New Zealand regular wine drinkers (n=1,017)

Source: IWSR Vinitrac®, New Zealand, November 2023 (n=1,017), New Zealand regular wine drinkers

# Region of origin awareness

## New Zealand's regular wine drinkers are aware of a much narrower range of regions than in 2017; this aligns with trends in other markets such as Australia and the UK

**Region of origin awareness: Tracking**

Percentage of those who know the following places produce wine

| Ranking '23 | | 2017 (n=1,000) | 2020 (n=1,002) | 2023 (n=1,017) | Tracking vs. '17 | Tracking vs. '20 |
|---|---|---|---|---|---|---|
| 1= | Hawke's Bay | 82% | 75% | 73% | ↓ | → |
| 1= | Marlborough | 84% | 79% | 73% | ↓ | ↓ |
| 3 | Central Otago | 69% | 60% | 62% | ↓ | → |
| 4= | Gisborne | 65% | 60% | 58% | ↓ | → |
| 4= | Hunter Valley | 68% | 59% | 58% | ↓ | → |
| 6 | Champagne | 66% | 61% | 56% | ↓ | ↓ |
| 7= | Martinborough | 66% | 58% | 55% | ↓ | → |
| 7= | Nelson | 64% | 58% | 55% | ↓ | → |
| 9 | Bordeaux | 66% | 58% | 54% | ↓ | → |
| 10 | Napa Valley | 63% | 56% | 53% | ↓ | → |
| 11= | Tuscany | 62% | 55% | 52% | ↓ | → |
| 11= | Waiheke | 61% | 52% | 52% | ↓ | → |
| 11= | Yarra Valley | 55% | 49% | 52% | → | → |
| 11= | Barossa Valley | 64% | 54% | 52% | ↓ | → |
| 15 | Canterbury | 54% | 51% | 51% | → | → |

Base: All New Zealand regular wine drinkers (n≥1,000); =Represents equal ranking

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

Source: IWSR Vinitrac®, October 2017 (n=1,000), October 2020 (n=1,002) and November 2023 (n=1,017) New Zealand regular wine drinkers

# Region of origin purchase

## A decline in awareness hasn't translated into lower purchase levels for most regions; only Marlborough, Hawke's Bay and Hunter Valley have lower purchase rates than in 2017, while Prosecco grew

**Region of origin purchase: Tracking**

Percentage of those who have bought wine from the following regions in the past three months

| Ranking '23 | | 2017 (n=1,000) | 2020 (n=1,002) | 2023 (n=1,017) | Tracking vs. '17 | Tracking vs. '20 |
|---|---|---|---|---|---|---|
| 1 | Marlborough | 46% | 40% | 35% | ↓ | ↓ |
| 2 | Hawke's Bay | 36% | 33% | 31% | ↓ | → |
| 3 | Central Otago | 25% | 20% | 22% | → | → |
| 4 | Martinborough | 15% | 14% | 14% | → | → |
| 5 | Barossa Valley | 13% | 10% | 11% | → | → |
| 6 | Gisborne | 12% | 11% | 10% | → | → |
| 7= | Canterbury | 9% | 8% | 9% | → | → |
| 7= | Auckland | 8% | 10% | 9% | → | → |
| 7= | Nelson | 10% | 9% | 9% | → | → |
| 10= | Prosecco | 3% | 6% | 8% | ↑ | ↑ |
| 10= | Waiheke | 8% | 7% | 8% | → | → |
| 10= | Wairarapa | 6% | 5% | 8% | → | ↑ |
| 13= | Hunter Valley | 10% | 8% | 7% | ↓ | → |
| 13= | Waipara | 8% | 8% | 7% | → | → |
| 15= | Waikato / Bay of Plenty | 4% | 5% | 5% | → | → |

Base: All New Zealand regular wine drinkers (n≥1,000); =Represents equal ranking
↑/↓: Statistically significantly higher/lower than the previous wave(s) at a 95% confidence level
Source: IWSR Vinitrac®, October 2017 (n=1,000), October 2020 (n=1,002) and November 2023 (n=1,017) New Zealand regular wine drinkers

# Wine-Buying Behaviours

# Wine-buying channel usage

## The proportion of regular wine drinkers who purchase wine in supermarkets has fallen, while specialist shops, wineries, online retailers and duty-free are being used more; the pandemic played a big role in this shift

### Wine-buying channel usage: Tracking

Percentage who have bought wine from the following channels in the past six months

| Ranking '23 | | 2017 (n=1,000) | 2020 (n=1,002) | 2023 (n=1,017) | Tracking vs. '17 | Tracking vs. '20 |
|---|---|---|---|---|---|---|
| 1 | In a supermarket | 90% | 87% | 82% | ↓ | ↓ |
| 2 | Traditional liquor store | 34% | 40% | 37% | → | → |
| 3 | Local hotel or bottle shop | 17% | 19% | 19% | → | → |
| 4 | From a supermarket website | n/a | n/a | 15% | n/a | n/a |
| 5 | From a specialist wine shop | 11% | 10% | 14% | → | ↑ |
| 6 | From a winery during a visit | 10% | 9% | 12% | → | ↑ |
| 7 | From an online retailer | 8% | 10% | 11% | ↑ | → |
| 8 | From Duty Free | 11% | 4% | 9% | → | ↑ |
| 9 | From a winery's website | 5% | 7% | 7% | → | → |
| 10 | From a wine club or membership organisation | 6% | 6% | 6% | → | → |
| 11 | From a delivery app | n/a | n/a | 5% | n/a | n/a |

Market context

"Having grown strongly during the pandemic, ecommerce has slowed. The franchise model of the big operators results in a clunky user experience, combined with delivery challenges. Most New Zealanders drive and have returned to in-store shopping with the removal of restrictions."

*Executive Summary Report 2023, New Zealand*

Base: All New Zealand regular wine drinkers (n≥1,000); =Represents equal ranking; n/a = tracking unavailable for this wave
↑/↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: IWSR Vinitrac®, October 2017 (n=1,000), October 2020 (n=1,002) and November 2023 (n=1,017) New Zealand regular wine drinkers

# Wine-buying retailer usage

## New Zealand's regular wine drinkers are extending the range of retailers they buy wine from, with a swing towards Liquorland, Super Liquor, Bottle-O and Countdown Online since 2017; New World is less popular

### Wine-buying retailer usage Top 15: Tracking

Percentage who have bought wine from the following channels in the past six months

| Ranking '23 | | 2017 | 2020 | 2023 | Tracking | |
|---|---|---|---|---|---|---|
| | | | | | vs. '17 | vs. '20 |
| 1 | Countdown | 52% | 52% | 51% | → | → |
| 2 | Pak 'n Save | 41% | 39% | 37% | → | → |
| 3 | New World | 43% | 38% | 34% | ↓ | → |
| 4 | Liquorland | 15% | 24% | 23% | ↑ | → |
| 5 | Super Liquor | 8% | 11% | 14% | ↑ | ↑ |
| 6 | Bottle-O | 4% | 8% | 9% | ↑ | → |
| 7 | Countdown Online | 3% | 6% | 7% | ↑ | → |
| 8 | Big Barrel | 4% | 4% | 5% | → | → |
| 9= | Four Square | 3% | 3% | 4% | → | ↑ |
| 9= | Liquor King | 6% | 4% | 4% | ↓ | → |
| 9= | Glengarry | 4% | 3% | 4% | → | → |
| 9= | Thirsty Liquor | 3% | 2% | 4% | → | ↑ |
| 13= | FreshChoice | 2% | 2% | 3% | → | → |
| 13= | Wine Direct | n/a | 2% | 3% | n/a | ↑ |
| 13= | Fine Wine Delivery Company | 2% | 2% | 3% | → | → |

Base: Those who buy wine in the Off-premise; =Represents equal ranking; n/a = tracking unavailable for this wave
↑/↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: IWSR Vinitrac®, October 2017 (n=1,000), October 2020 (n=1,002) and November 2023 (n=1,017) New Zealand regular wine drinkers

# Consumption frequency

## Boomers are some of the most frequent consumers of wine in New Zealand, with significantly more of them drinking wine daily; Gen Zs are more likely than regular wine drinkers overall to drink wine monthly

### Wine consumption frequency: Tracking

Percentage who usually drink wine at the following frequency

| | 2017 (n=1,000) | 2020 (n=1,002) | 2023 (n=1,017) | Tracking vs. '17 | Tracking vs. '20 |
|---|---|---|---|---|---|
| Most days / every day | 15% | 13% | 13% | → | → |
| 2-5 times a week | 31% | 28% | 31% | → | → |
| About once a week | 26% | 30% | 29% | → | → |
| 1-3 times a month | 28% | 29% | 27% | → | → |

### Wine consumption frequency: by generation

Percentage who usually drink wine at the following frequency

| | All New Zealand Regular Wine Drinkers (n=1,017) | Gen Z LDA-26 (n=92) | Millennials 27-42 (n=292) | Gen X 43-58 (n=263) | Boomers 59+ (n=370) |
|---|---|---|---|---|---|
| Most days / every day | 13% | 2% | 9% | 12% | 18% |
| 2-5 times a week | 31% | 24% | 30% | 30% | 33% |
| About once a week | 29% | 32% | 33% | 34% | 22% |
| 1-3 times a month | 27% | 42% | 28% | 23% | 27% |

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

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

Source: IWSR Vinitrac®, October 2017 (n=1,000), October 2020 (n=1,002) and November 2023 (n=1,017) New Zealand regular wine drinkers

# Off-trade consumption frequency

## Off-trade frequency has increased for formal dinners and celebrations at home since 2017, but has declined for informal meals at home. The most popular occasion remains a relaxing end-of-day drink

**Off-trade: Wine consumption frequency by occasion**

Those who buy wine in the off-trade; table below shows the number of days per month that consumers are drinking wine at these occasions

| | 2017 | 2020 | 2023 | Tracking vs. '17 | Tracking vs. '20 |
|---|---|---|---|---|---|
| A relaxing drink at the end of the day at home | 7.36 | 6.79 | 7.17 | → | → |
| With an informal meal at home | 6.66 | 5.84 | 5.87 | ↓ | → |
| With a more formal dinner party at home | 1.39 | 1.65 | 1.69 | ↑ | → |
| At a party / celebration at home | 1.31 | 1.75 | 1.89 | ↑ | → |

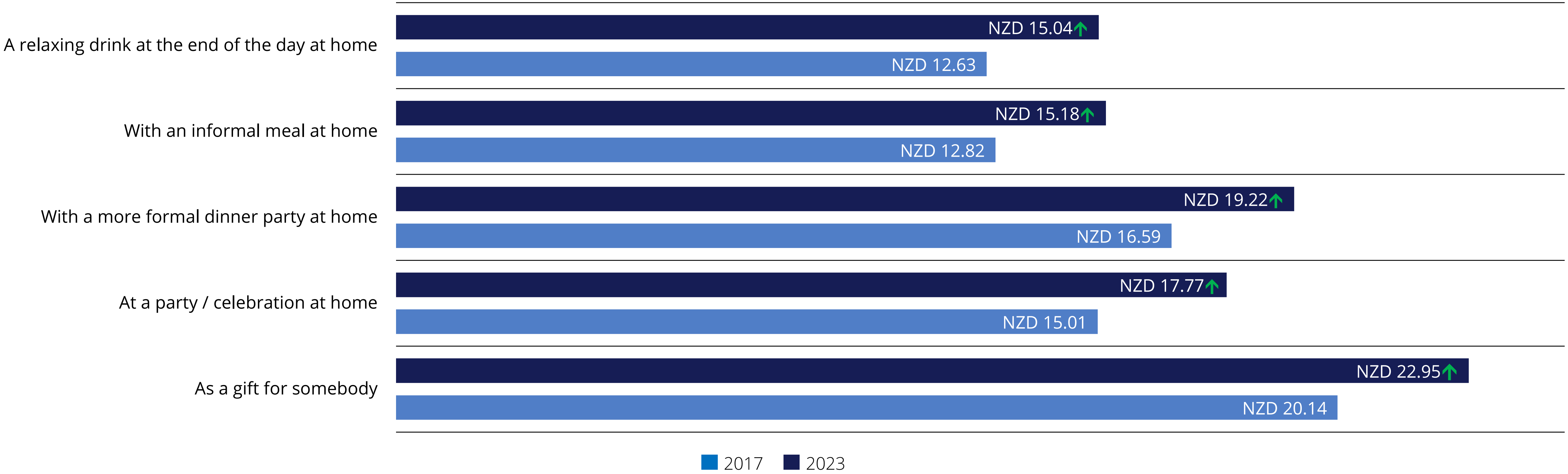
Base: Those who buy wine in the off-trade
↑/↓: Statistically significantly higher/lower than the previous wave(s) at a 95% confidence level
Source: IWSR Vinitrac®, October 2017 (n=1,000), October 2020 (n=1,002) and November 2023 (n=1,017) New Zealand regular wine drinkers

# Off-trade spend

## Off-trade spend has increased significantly across the board since 2017, highlighting the impact of both inflation and premiumisation

**Off-trade: Typical spend per bottle by occasion**

Those who buy wine in the off-trade




Base: Those who buy wine in the off-trade

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

Source: IWSR Vinitrac®, October 2017 (n=1,000) and November 2023 (n=1,017) New Zealand regular wine drinkers

# On-trade purchase

## The proportion of regular wine drinkers who buy wine in the on-trade has remained stable since 2017; a significantly larger share of Millennials buy wine in bars or pubs, compared to all regular wine drinkers

### Wine purchase in on-trade

Percentage who buy wine in a bar, pub or restaurant

| On-premise location | | 2017 (n=1,000) | 2020 (n=1,002) | 2023 (n=1,017) | Tracking vs. '17 | Tracking vs. '20 |
|---|---|---|---|---|---|---|
| Bar or pub | Yes | 51% | 53% | 54% | → | → |
| | No | 49% | 47% | 46% | → | → |
| Restaurant | Yes | 81% | 82% | 81% | → | → |
| | No | 19% | 18% | 19% | → | → |
| On-trade drinkers | Yes | 83% | 84% | 84% | → | → |
| | No | 17% | 16% | 16% | → | → |

### Wine purchase in on-trade: by generation

Percentage who buy wine in a bar, pub or restaurant

| On-premise location | | All New Zealand Regular Wine Drinkers (n=1,017) | Gen Z LDA-26 (n=92) | Millennials 27-42 (n=292) | Gen X 43-58 (n=263) | Boomers 59+ (n=370) |
|---|---|---|---|---|---|---|
| Bar or pub | Yes | 54% | 53% | 66% | 53% | 46% |
| | No | 46% | 47% | 34% | 47% | 54% |
| Restaurant | Yes | 81% | 85% | 82% | 80% | 80% |
| | No | 19% | 15% | 18% | 20% | 20% |
| On-premise drinkers | Yes | 84% | 87% | 88% | 83% | 82% |
| | No | 16% | 13% | 12% | 17% | 18% |

Base: All New Zealand regular wine drinkers (n≥1,000)
↑/↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level; %/%: Statistically significantly higher / lower than all regular wine drinkers at a 95% confidence level
Source: IWSR Vinitrac®, October 2017 (n=1,000), October 2020 (n=1,002) and November 2023 (n=1,017) New Zealand regular wine drinkers

# On-trade consumption frequency

## On-trade frequency in New Zealand has increased for most occasions compared to pre-pandemic levels

**On-trade: Wine consumption frequency by occasion**

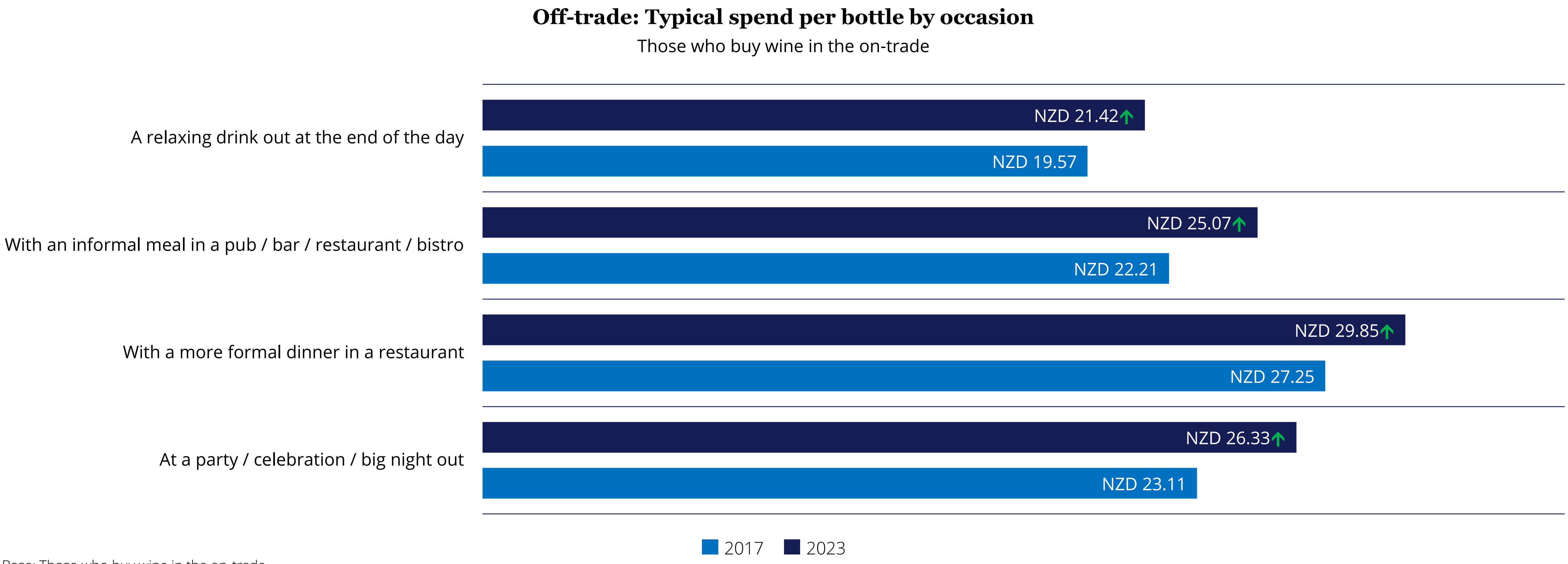
Those who buy wine in the on-trade; table below shows the number of days per month that consumers are drinking wine at these occasions

| | 2017 | 2020 | 2023 | Tracking vs. '17 | Tracking vs. '20 |
|---|---|---|---|---|---|
| A relaxing drink out at the end of the day | 3.50 | 3.66 | 4.07 | → | → |
| With an informal meal in a pub / bar / restaurant / bistro | 1.43 | 1.71 | 1.92 | ↑ | → |
| With a more formal dinner in a restaurant | 1.28 | 1.63 | 1.61 | ↑ | → |
| At a party / celebration / big night out | 1.22 | 1.49 | 1.70 | ↑ | → |

Base: Those who buy wine in the on-trade; Table above shows the number of days per month that consumers are drinking wine at these occasions
↑/↓: Statistically significantly higher lower than the previous wave(s) at a 95% confidence level
Source: IWSR Vinitrac®, October 2017 (n=1,000), October 2020 (n=1,002) and November 2023 (n=1,017) New Zealand regular wine drinkers

# On-trade spend

## As on-trade consumption frequency has increased, so has typical spend, across all occasions




Base: Those who buy wine in the on-trade
↑/↓: Statistically significantly higher/lower than the previous wave(s) at a 95% confidence level
Source: IWSR Vinitrac®, October 2017 (n=1,000) and November 2023 (n=1,017) New Zealand regular wine drinkers

# Wine Views and Attitudes

# Attitudes towards wine

## There is variation in approach to the wine category between ages: Gen Zs are more price sensitive than regular wine drinkers overall; Millennials are more likely to experiment; Boomers stick to what they know

### Attitudes towards wine: Tracking

Percentage who ‘agree’ or ‘strongly agree’ with the following statements

| | 2017 (n=1,000) | 2020 (n=1,002) | 2023 (n=1,017) | Tracking vs. '17 | Tracking vs. '20 |
|---|---|---|---|---|---|
| I enjoy trying new and different styles of wine on a regular basis | 37% | 34% | 35% | → | → |
| I don't mind what I buy so long as the price is right | 27% | 29% | 29% | → | → |
| I know what I like and I tend to stick to what I know | 36% | 37% | 36% | → | → |

### Attitudes towards wine by generation

Percentage who ‘agree’ or ‘strongly agree’ with the following statements

| | All New Zealand Regular Wine Drinkers (n=1,017) | Gen Z LDA-26 (n=92) | Millennials 27-42 (n=292) | Gen X 43-58 (n=263) | Boomers 59+ (n=370) |
|---|---|---|---|---|---|
| I enjoy trying new and different styles of wine on a regular basis | 35% | 43% | 48% | 39% | 20% |
| I don't mind what I buy so long as the price is right | 29% | 45% | 34% | 31% | 21% |
| I know what I like and I tend to stick to what I know | 36% | 12% | 18% | 30% | 59% |

Base: All New Zealand regular wine drinkers (n≥1,000)
↑/↓: Statistically significantly higher/lower than the previous wave(s) at a 95% confidence level; %/%: Statistically significantly higher/lower than all regular wine drinkers at a 95% confidence level
Source: IWSR Vinitrac®, October 2017 (n=1,000), October 2020 (n=1,002) and November 2023 (n=1,017) New Zealand regular wine drinkers

# Wine involvement

## There is a long-term shift among regular wine drinkers towards higher involvement in the category; this is most pronounced among Millennials

### Wine involvement: Tracking

| | 2017 (n=1,000) | 2020 (n=1,002) | 2023 (n=1,017) | Tracking vs. '17 | Tracking vs. '20 |
|---|---|---|---|---|---|
| High involvement | 23% | 24% | 27% | ↑ | → |
| Medium involvement | 46% | 44% | 46% | → | → |
| Low involvement | 31% | 32% | 27% | ↓ | ↓ |

### Wine involvement by generation

| | All New Zealand Regular Wine Drinkers (n=1,017) | Gen Z LDA-26 (n=92) | Millennials 27-42 (n=292) | Gen X 43-58 (n=263) | Boomers 59+ (n=370) |
|---|---|---|---|---|---|
| High involvement | 27% | 17% | 35% | 27% | 23% |
| Medium involvement | 46% | 39% | 47% | 46% | 48% |
| Low involvement | 27% | 44% | 18% | 27% | 29% |

Base: All New Zealand regular wine drinkers (n≥1,000)
↑/↓: Statistically significantly higher/lower than the previous wave(s) at a 95% confidence level; %/%: Statistically significantly higher/lower than all regular wine drinkers at a 95% confidence level
Source: IWSR Vinitrac®, October 2017 (n=1,000), October 2020 (n=1,002) and November 2023 (n=1,017) New Zealand regular wine drinkers

# Involvement and perceived expertise

## New Zealand's regular wine drinkers are significantly more confident than before the pandemic and more involved across a range of statements, including feeling competent and having a strong interest in wine

**Involvement and perceived expertise in wine: Tracking**

Percentage who 'agree' or 'strongly agree' with the following statements

| Ranking '23 | | 2017 (n=1,000) | 2020 (n=1,002) | 2023 (n=1,017) | Tracking vs. '17 | Tracking vs. '20 |
|---|---|---|---|---|---|---|
| 1 | Drinking wine gives me pleasure | 80% | 79% | 81% | → | → |
| 2 | I always look for the best quality wines I can get for my budget | 75% | 72% | 75% | → | → |
| 3 | Deciding which wine to buy is an important decision | 57% | 59% | 63% | ↑ | → |
| 4 | Generally speaking, wine is reasonably priced | 54% | 59% | 55% | → | ↓ |
| 5 | I like to take my time when I purchase a bottle of wine | 51% | 53% | 51% | → | → |
| 6 | I have a strong interest in wine | 37% | 38% | 44% | ↑ | ↑ |
| 7 | I feel competent about my knowledge of wine | 34% | 37% | 43% | ↑ | ↑ |
| 8= | Generally speaking, wine is an expensive drink | 32% | 39% | 42% | ↑ | → |
| 8= | Wine is important to me in my lifestyle | 37% | 39% | 42% | ↑ | → |
| 10 | Compared to others, I know less about the subject of wine | 38% | 41% | 36% | → | ↓ |
| 11 | I don't understand much about wine | 24% | 30% | 26% | → | → |

Base: All New Zealand regular wine drinkers (n≥1,000)
↑/↓: Statistically significantly higher/lower than the previous wave(s) at a 95% confidence level
Source: IWSR Vinitrac®, October 2017 (n=1,000), October 2020 (n=1,002) and November 2023 (n=1,017) New Zealand regular wine drinkers

# Involvement and perceived expertise

## Millennials clearly demonstrate high levels of engagement with the wine category, with a significantly larger proportion saying they have a strong interest in wine and that it is important to their lifestyles

**Involvement and perceived expertise in wine by generation**

Percentage who 'agree' or 'strongly agree' with the following statements

| Ranking '23 | | All New Zealand Regular Wine Drinkers (n=1,017) | Gen Z LDA-26 (n=92) | Millennials 27-42 (n=292) | Gen X 43-58 (n=263) | Boomers 59+ (n=370) |
|---|---|---|---|---|---|---|
| 1 | Drinking wine gives me pleasure | 81% | 71% | 80% | 83% | 82% |
| 2 | I always look for the best quality wines I can get for my budget | 75% | 59% | 76% | 77% | 78% |
| 3 | Deciding which wine to buy is an important decision | 63% | 44% | 70% | 64% | 62% |
| 4 | Generally speaking, wine is reasonably priced | 55% | 57% | 64% | 50% | 49% |
| 5 | I like to take my time when I purchase a bottle of wine | 51% | 46% | 58% | 50% | 48% |
| 6 | I have a strong interest in wine | 44% | 32% | 58% | 44% | 37% |
| 7 | I feel competent about my knowledge of wine | 43% | 29% | 49% | 40% | 43% |
| 8= | Generally speaking, wine is an expensive drink | 42% | 42% | 48% | 40% | 38% |
| 8= | Wine is important to me in my lifestyle | 42% | 22% | 49% | 45% | 39% |
| 10 | Compared to others, I know less about the subject of wine | 36% | 54% | 43% | 32% | 30% |
| 11 | I don't understand much about wine | 26% | 35% | 38% | 22% | 17% |

Base: All New Zealand regular wine drinkers (n=1,017)
%/%: Statistically significantly higher/lower than all regular wine drinkers at a 95% confidence level
Source: IWSR Vinitrac®, New Zealand, November 2023 (n=1,017), New Zealand regular wine drinkers

# Wine knowledge and confidence indices

## The relationship regular wine drinkers have with wine has evolved. They have a narrower knowledge base but significantly higher confidence levels

### Wine knowledge index: Tracking[1]

Wine knowledge index is the 'objective' measurement of consumer knowledge about wine

| | 2017 (n=1,000) | 2020 (n=1,002) | 2023 (n=1,017) | Tracking vs. '17 | Tracking vs. '20 |
|---|---|---|---|---|---|
| Knowledge Index | 50.3 | 44.0 | 43.4 | ↓ | → |

### Wine confidence index: Tracking[2]

Wine confidence index is the 'subjective' measurement of consumer confidence about their wine knowledge

| | 2017 (n=1,000) | 2020 (n=1,002) | 2023 (n=1,017) | Tracking vs. '17 | Tracking vs. '20 |
|---|---|---|---|---|---|
| Confidence Index | 51.1 | 50.7 | 53.3 | ↑ | ↑ |

[1]Wine knowledge index (0–100) is calculated based on consumer-reported awareness of wine-growing regions and wine brands.
[2]Wine confidence index (0–100) is calculated based on the extent to which consumers feel competent about their wine knowledge. Wine confidence index uses consumers' answers to three attitudinal statements: 1) I feel competent about my knowledge of wine / 2) Compared to others, I know less about the subject of wine / 3) I don't understand much about wine.
Base: All New Zealand regular wine drinkers (n≥1,000); ↑/↓: Statistically significantly higher/lower than the previous wave(s) at a 95% confidence level
Source: IWSR Vinitrac®, October 2017 (n=1,000), October 2020 (n=1,002) and November 2023 (n=1,017) New Zealand regular wine drinkers

# Wine-drinking motivations

## There are variations in wine-drinking motivations by age: Gen Zs and Millennials value wine for its fashion and sophistication, Gen X for its ability to make them feel relaxed and Boomers because it enhances food

**Wine drinking motivations by generation**

Percentage who 'agree' or 'strongly agree' with the following statements

| Ranking '23 | | All New Zealand Regular Wine Drinkers (n=1,017) | Gen Z LDA-26 (n=92) | Millennials 27-42 (n=292) | Gen X 43-58 (n=263) | Boomers 59+ (n=370) |
|---|---|---|---|---|---|---|
| 1= | Drinking wine makes me feel relaxed | 59% | 50% | 58% | 69% | 56% |
| 1= | To celebrate special occasions | 59% | 44% | 49% | 62% | 69% |
| 3 | Wine enhances food and meals | 54% | 36% | 47% | 52% | 64% |
| 4 | I really love the taste of wine | 48% | 30% | 43% | 54% | 52% |
| 5 | Wine is about sharing with a partner / close friend or family member | 43% | 34% | 38% | 38% | 54% |
| 6 | Wine is about sharing something with others | 40% | 24% | 36% | 37% | 49% |
| 7 | Wine helps create a warm / friendly atmosphere | 39% | 32% | 36% | 40% | 43% |
| 8 | I treat myself with wine at the end of the day | 35% | 33% | 35% | 42% | 31% |
| 9 | Wine is a refreshing drink | 27% | 22% | 27% | 24% | 30% |
| 10 | Drinking wine can be good for my health | 25% | 12% | 26% | 24% | 28% |
| 11 | Most of my friends drink wine | 23% | 21% | 26% | 19% | 23% |
| 12 | I like shopping / choosing wines to drink | 22% | 21% | 23% | 22% | 21% |
| 13 | I like learning about new wines | 21% | 20% | 26% | 24% | 17% |
| 14 | Wine is a fashionable drink | 16% | 26% | 19% | 13% | 13% |
| 15 | It makes people sophisticated | 11% | 22% | 19% | 10% | 2% |
| 16 | It makes me feel individual and unique | 10% | 14% | 16% | 10% | 5% |

Base: All New Zealand regular wine drinkers (n=1,017)
%/%: Statistically significantly higher/lower than all regular wine drinkers at a 95% confidence level
Source: IWSR Vinitrac®, New Zealand, November 2023 (n=1,017), New Zealand regular wine drinkers

# Wine-buying choice cues

## New Zealand's regular wine drinkers are becoming increasingly sophisticated, placing greater emphasis on the grape variety and country or region of origin

**Wine choice cues: Tracking**

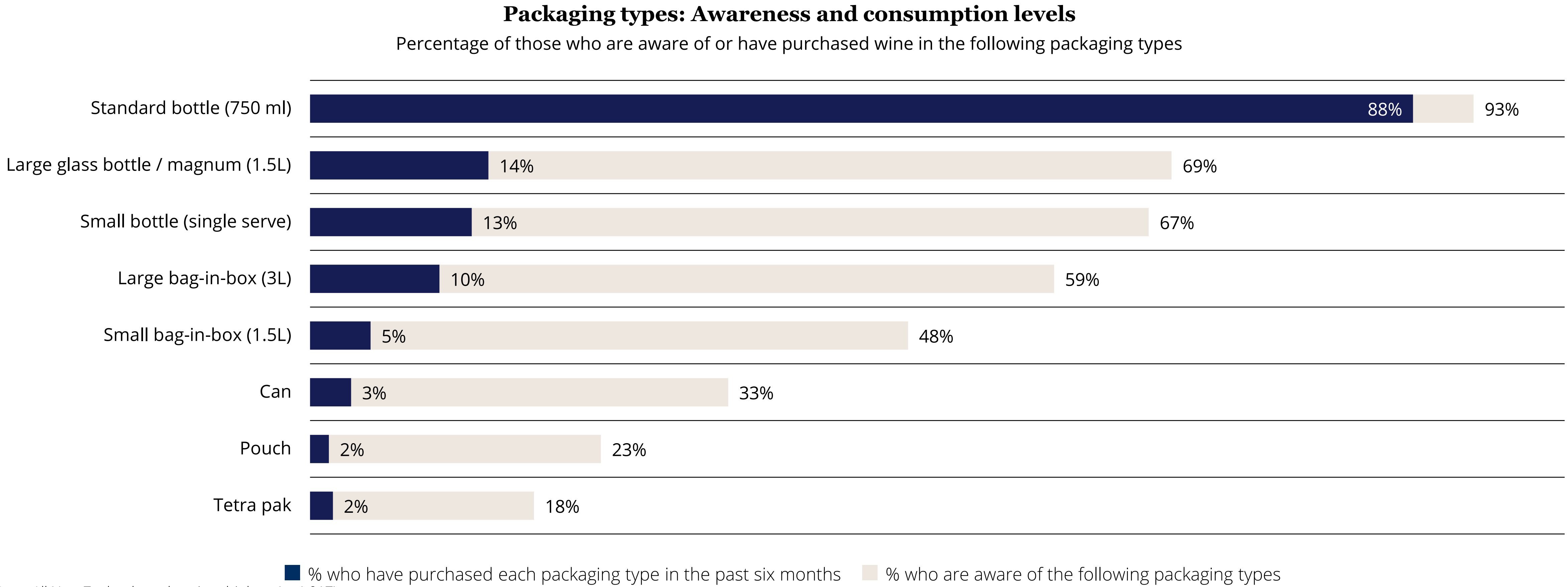
Percentage who indicate each of the following factors is 'important' or 'very important' when buying wine

| Ranking '23 | | 2017 (n=1,000) | 2020 (n=1,002) | 2023 (n=1,017) | Tracking vs. '17 | Tracking vs. '20 |
|---|---|---|---|---|---|---|
| 1 | Grape variety | 76% | 73% | 79% | → | ↑ |
| 2 | A brand I am aware of | 70% | 71% | 70% | → | → |
| 3 | Promotional offer | 57% | 58% | 61% | → | → |
| 4 | The country of origin | 53% | 52% | 58% | ↑ | ↑ |
| 5= | Recommendation by friend or family | 56% | 56% | 56% | → | → |
| 5= | Taste or wine style descriptions displayed on the shelves or on wine labels | 49% | 52% | 56% | ↑ | → |
| 7= | Wine that matches or complements food | 51% | 52% | 53% | → | → |
| 7= | The region of origin | 47% | 48% | 53% | ↑ | ↑ |
| 9 | Alcohol content | 34% | 39% | 48% | ↑ | ↑ |
| 10 | Appeal of the bottle and / or label design | 27% | 34% | 36% | ↑ | → |
| 11 | Whether or not the wine has won a medal or award | 30% | 30% | 33% | → | → |
| 12 | Recommendations from shop staff or shop leaflets | 29% | 32% | 31% | → | → |
| 13 | Recommendation by wine critic or writer | 24% | 28% | 25% | → | → |
| 14 | Recommendation by wine guide books | 21% | 24% | 24% | → | → |

Base: All New Zealand regular wine drinkers (n≥1,000); = Represents equal ranking
↑/↓: Statistically significantly higher/lower than the previous wave(s) at a 95% confidence level
Source: IWSR Vinitrac®, October 2017 (n=1,000), October 2020 (n=1,002) and November 2023 (n=1,017) New Zealand regular wine drinkers

# Packaging type consumption and awareness

## Standard bottles remain the favourite packaging type of regular wine drinkers in New Zealand. There is good awareness of other packaging types, but purchase levels are relatively small




Base: All New Zealand regular wine drinkers (n=1,017)
Source: IWSR Vinitrac®, New Zealand, Nov '23 (n=1,017), New Zealand regular wine drinkers

# Packaging purchase

## Alternative packaging formats tend to perform better among younger regular wine drinkers; Gen Zs and Millennials are more aware of Tetra Pak and have higher conversion rates for the format

### Packaging purchase: by generation

Percentage who have purchased wine in the following packaging types

| Ranking '23 | | All New Zealand Regular Wine Drinkers (n=1,017) | Gen Z LDA-26 (n=92) | Millennials 27-42 (n=292) | Gen X 43-58 (n=263) | Boomers 59+ (n=370) |
|---|---|---|---|---|---|---|
| 1 | Standard bottle (750 ml) | 88% | 80% | 79% | 93% | 94% |
| 2 | Large glass bottle / magnum (1.5L) | 14% | 28% | 20% | 12% | 8% |
| 3 | Small bottle (single serve) | 13% | 14% | 16% | 14% | 9% |
| 4 | Large bag-in-box (3L) | 10% | 10% | 8% | 10% | 13% |
| 5 | Small bag-in-box (1.5L) | 5% | 8% | 7% | 4% | 3% |
| 6 | Can | 3% | 5% | 5% | 5% | 1% |
| 7= | Tetra pak | 2% | 6% | 4% | 1% | 0% |
| 7= | Pouch | 2% | 4% | 4% | 0% | 0% |

### Packaging conversion: by generation

Percentage who have heard of each type of packaging types and have purchased wine in it

| Ranking '23 | | Those who have heard of each type of packaging | Gen Z LDA-26 | Millennials 27-42 | Gen X 43-58 | Boomers 59+ |
|---|---|---|---|---|---|---|
| 1 | Standard bottle (750 ml) | 95% | 90% | 93% | 97% | 95% |
| 2 | Large glass bottle / magnum (1.5L) | 21% | 52% | 33% | 16% | 11% |
| 3 | Small bottle (single serve) | 19% | 25% | 28% | 20% | 12% |
| 4 | Large bag-in-box (3L) | 17% | 24% | 20% | 15% | 17% |
| 5= | Tetra pak | 10% | 42% | 26% | 5% | 0% |
| 5= | Small bag-in-box (1.5L) | 10% | 18% | 16% | 8% | 6% |
| 5= | Can | 10% | 19% | 20% | 12% | 1% |
| 8 | Pouch | 7% | 14% | 16% | 0% | 1% |

Base: All New Zealand regular wine drinkers (n=1,017); = Represents equal ranking
↑/↓: Statistically significantly higher/lower than the previous wave(s) at a 95% confidence level; %/%: Statistically significantly higher/lower than all regular wine drinkers at a 95% confidence level;
Source: IWSR Vinitrac®, November 2023 (n=1,017) New Zealand regular wine drinkers

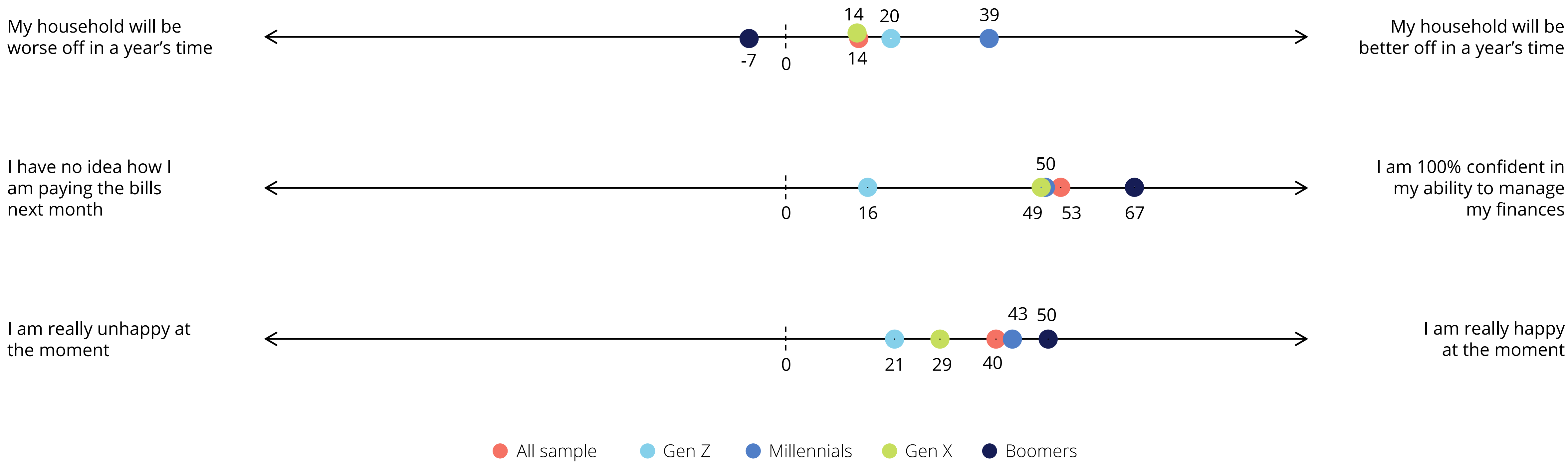
# Hot Topic: Consumer Sentiment

# Consumer sentiment

## Well-being sentiment among New Zealand regular wine drinkers is highly positive across age groups, with Millennials particularly optimistic about their financial outlook

### Consumer sentiment: general well-being

Net score of percentage who agree with leftmost statement subtracted from the percentage who agree with the rightmost statement



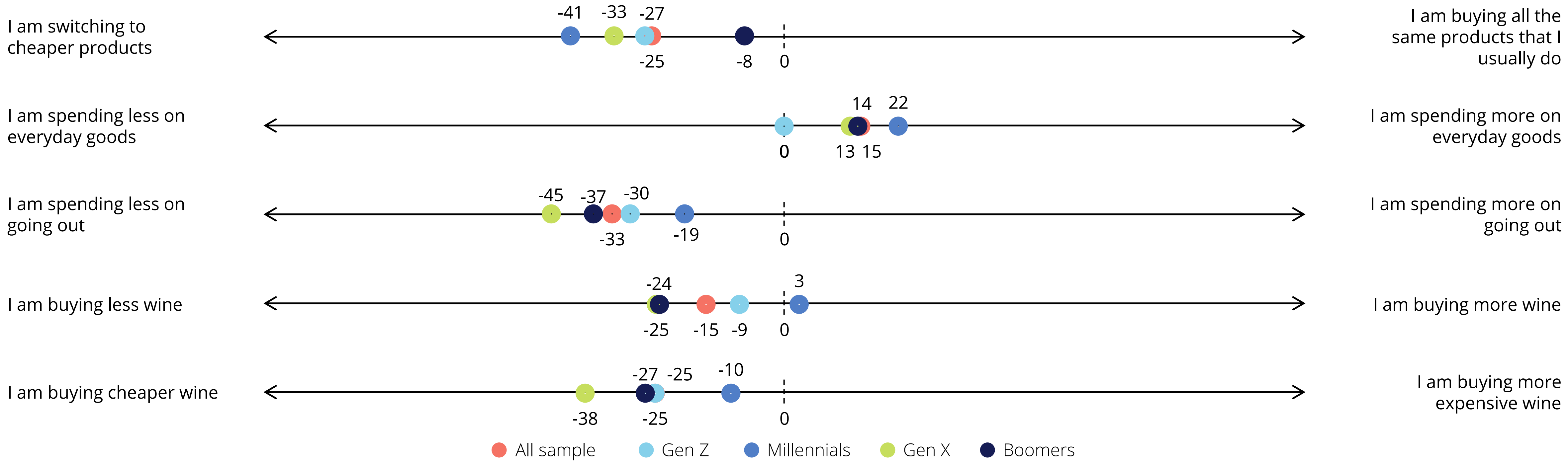

Base: All New Zealand regular wine drinkers (n=1,017)
Source: IWSR Vinitrac®, New Zealand, November 2023 (n=1,017), New Zealand regular wine drinkers

# Consumer sentiment

## Financial pressure has forced regular wine drinkers to adjust their consumption and spending habits, helping to explain why they are buying less and cheaper wine

**Consumer sentiment: spending and wine**

Net score of percentage who agree with leftmost statement subtracted from the percentage who agree with the rightmost statement



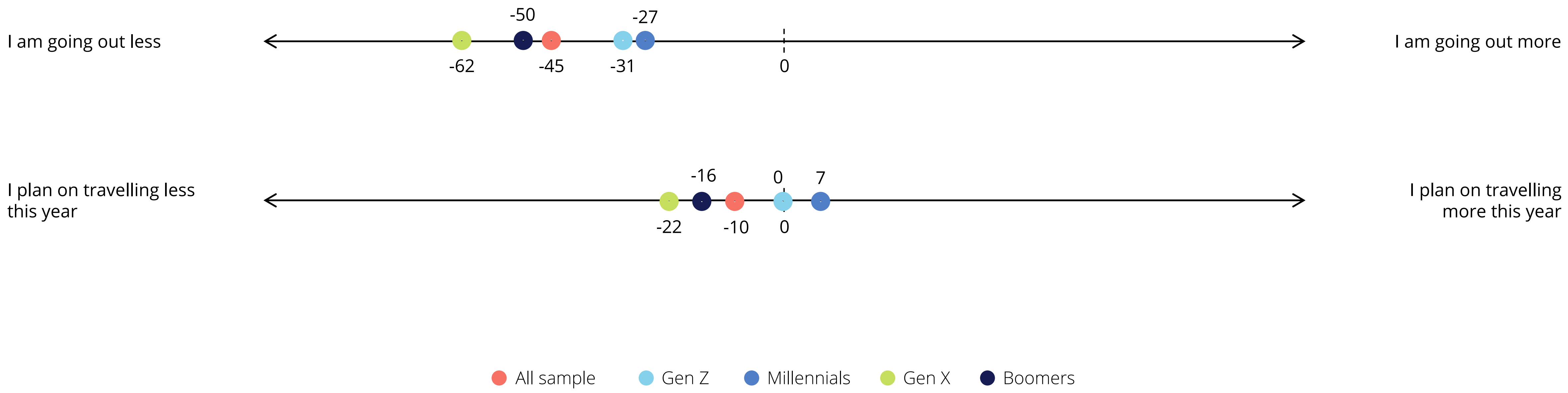

Base: All New Zealand regular wine drinkers (n=1,017)
Source: IWSR Vinitrac®, New Zealand, November 2023 (n=1,017), New Zealand regular wine drinkers

# Consumer sentiment

## Regular wine drinkers are travelling and going out less, which could be another indication that they are feeling financial pressure; the exception is Millennials who are planning to travel more this year

**Consumer sentiment: travel and socialising**

Net score of percentage who agree with leftmost statement subtracted from the percentage who agree with the rightmost statement

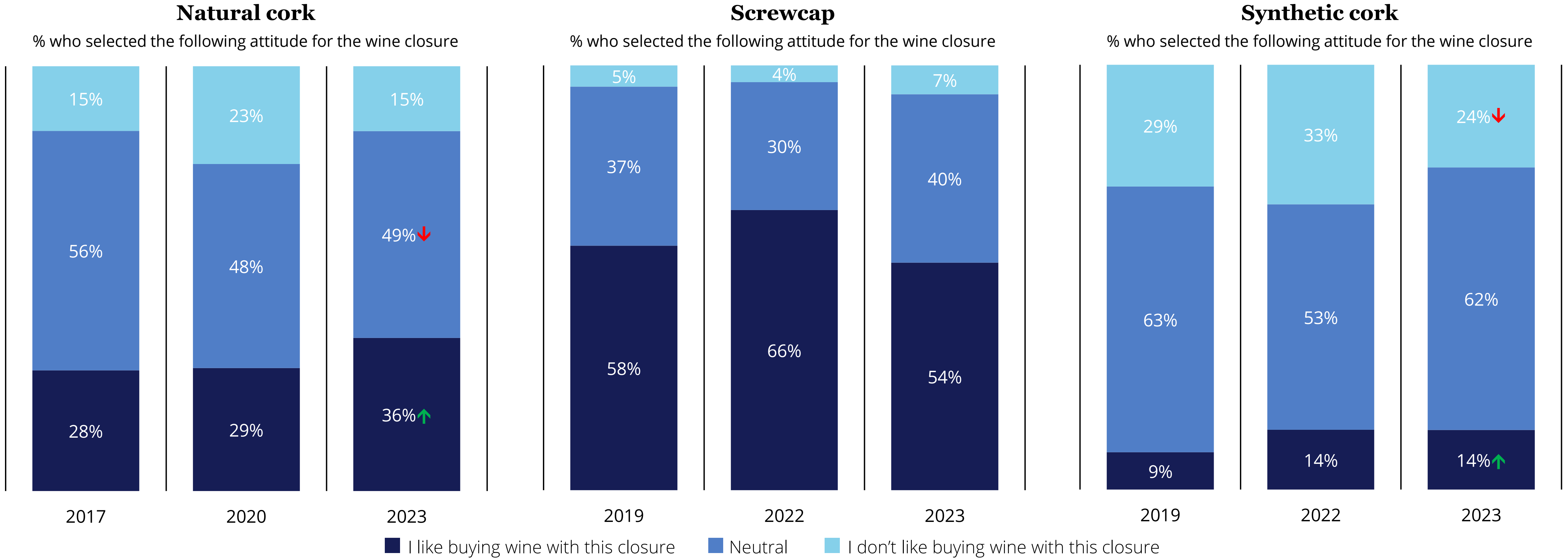



Base: All New Zealand regular wine drinkers (n=1,017)
Source: IWSR Vinitrac®, New Zealand, November 2023 (n=1,017), New Zealand regular wine drinkers

# Hot Topic: Wine Closures

# Wine closures

## Screw-caps remain the closure of choice among New Zealand's regular wine drinkers, probably due to their practicality, though there has been an increase in the popularity of natural and synthetic corks since 2017




Base: All New Zealand regular wine drinkers (n≥1,000); =Represents equal ranking

↑/↓: Statistically significantly higher/lower than the 2017 wave at a 95% confidence level

Source: IWSR Vinitrac®, October 2017 (n=1,000), October 2020 (n=1,002) and November 2023 (n=1,017) New Zealand regular wine drinkers

# Views on wine closure types

## Screw-caps are associated with practicality and everyday drinking, and are seen as modern and trustworthiness; natural corks are viewed as traditional, high-quality and good for special occasions

### Wine closure types imagery

% who associate the following statements with each type of wine closure

| | Screw-cap (n=1,017) | Synthetic cork (n=1,017) | Natural cork (n=1,017) |
|---|---|---|---|
| Practical | 63% | 17% | 12% |
| Good for everyday drinking | 58% | 18% | 17% |
| Good for special occasions | 20% | 14% | 46% |
| Opening a wine with this type of closure gives me pleasure | 21% | 10% | 38% |
| High quality | 20% | 11% | 46% |
| Trustworthy | 41% | 16% | 32% |
| Low quality | 14% | 25% | 4% |
| Cheap | 32% | 27% | 7% |
| Affordable | 48% | 19% | 13% |
| Sustainable | 27% | 12% | 34% |
| Recyclable | 35% | 15% | 32% |
| Traditional | 8% | 8% | 67% |
| Modern | 54% | 23% | 10% |
| Innovative | 35% | 19% | 10% |
| Outdated | 8% | 18% | 27% |

Base: All New Zealand regular wine drinkers (n=1,017); Green/turquoise: Statistically significantly higher than 2/1 wine closure types at a 95% confidence level
Source: IWSR Vinitrac®, November 2023 (n=1,017), New Zealand regular wine drinkers

# Brand Health

# Global Wine Brand Power Index

## Brand health measures included in the index

| | | | |
|---|---|---|---|
| **Awareness** | % who have heard of each brand (when prompted with a list of brand names with logos)<br>Base = All wine drinkers | **Brand awareness index** | **Wine Brand Power Index** |
| **Purchase** | % who have bought each brand in the past 3 months<br>Base = All wine drinkers | **Brand purchase index** | |
| **Conversion** | % who have bought each brand in the past 3 months<br>Base = Those who have heard of each brand | | |
| **Consideration** | % who would consider buying each brand<br>Base = Those who have heard of each brand | | |
| **Affinity** | % who think each brand is right for people like them<br>Base = Those who have heard of each brand | **Brand connection index** | |
| **Recommendation** | % who would recommend each brand to a friend<br>Base = Those who have heard of each brand | | |

# Brand Power

Domestically produced Oyster Bay and Villa Maria are two of New Zealand's top three most powerful wine brands. With domestic wine accounting for two-thirds of volumes sold, nine of the top 10 brands are home-grown. Australian brand Jacob's Creek has had a particularly strong performance since the last Brand Power Index ranking

Oyster Bay

1st

JACOB'S CREEK

2nd

VILLA MARIA
NEW ZEALAND

3rd

# New Zealand Wine Brand Power Index 2023

## Jacob's Creek has overtaken Villa Maria to be the second most powerful brand; Oyster Bay remains at the top of the rankings despite posting a lower score than last year

### New Zealand Brand Power Index

The top 30 most powerful wine brands in the New Zealand market based on consumer feedback from six key brand health measures

| Ranking '23 | | Final Index | Tracking vs 2022 | Score difference vs 2022 |
|---|---|---|---|---|
| 1 | Oyster Bay | 97.3 | = | -2.2 |
| 2 | Jacob's Creek | 95.0 | ↑+1 | 6.0 |
| 3 | Villa Maria | 91.6 | ↓-1 | -0.5 |
| 4 | The Ned | 84.1 | = | -1.1 |
| 5 | Church Road | 83.2 | = | 0.6 |
| 6 | Cloudy Bay | 76.7 | = | -4.0 |
| 7 | Mission Estate | 74.7 | ↑+2 | 5.4 |
| 8 | Wither Hills | 73.4 | = | -0.3 |
| 9 | Stoneleigh | 72.7 | ↓-2 | -2.1 |
| 10 | Mud House | 71.9 | ↑+1 | 4.5 |
| 11 | Montana | 71.5 | ↓-1 | 3.1 |
| 12 | Brown Brothers | 67.8 | ↑+1 | 7.1 |
| 13 | Wolf Blass | 67.2 | ↓-1 | 4.3 |
| 14 | Squealing Pig | 66.8 | ↑+6 | 12.4 |
| 15 | Shingle Peak | 64.7 | ↑+2 | 6.1 |

| Ranking '23 | | Final Index | Tracking vs 2022 | Score difference vs 2022 |
|---|---|---|---|---|
| 16 | Selaks | 63.4 | ↓-2 | 4.0 |
| 17 | Penfolds | 59.1 | ↓-2 | 0.0 |
| 18 | Brancott Estate | 57.3 | ↑+1 | 2.8 |
| 19 | Kim Crawford | 57.3 | ↓-1 | 0.3 |
| 20 | Peter Yealands | 54.4 | ↓-4 | -4.4 |
| 21 | Banrock Station | 54.4 | = | 1.3 |
| 22 | Giesen | 53.8 | ↑+1 | 3.4 |
| 23 | Taylors | 52.0 | ↑+3 | 4.5 |
| 24 | Sacred Hill | 51.2 | ↓-2 | -0.3 |
| 25 | Tohu | 50.9 | ↓-1 | 0.9 |
| 26 | Matua | 49.8 | ↓-1 | 0.7 |
| 27 | Jim Barry | 47.5 | ↑+15 | 12.4 |
| 28 | McGuigan | 46.6 | ↑+3 | 3.5 |
| 29 | Ngatarawa | 46.4 | ↓-2 | 1.0 |
| 30 | Saint Clair | 45.9 | ↓-2 | 0.6 |

Note: New Zealand brand power comes from our annual score published in spring 2022
Source: IWSR Vinitrac®, New Zealand, February 2022 and November 2023 (n≥1,000), New Zealand regular wine drinkers

# Brand awareness

## New Zealand's regular wine drinkers are aware of a narrower range of brands than in 2017; this trend is in line with wine drinkers in other markets such as Australia and the UK

**Awareness: Tracking**

Percentage who have heard of the following brands

| Ranking '23 | | 2017 (n=1,000) | 2020 (n=1,002) | 2023 (n=1,017) | Tracking vs. '17 | Tracking vs. '20 |
|---|---|---|---|---|---|---|
| 1= | Jacob's Creek | 88% | 80% | 77% | ↓ | → |
| 1= | Oyster Bay | 83% | 77% | 77% | ↓ | → |
| 3 | Villa Maria | 80% | 77% | 75% | ↓ | → |
| 4 | Montana | 82% | 71% | 70% | ↓ | → |
| 5 | Stoneleigh | 75% | 71% | 66% | ↓ | ↓ |
| 6 | Church Road | 70% | 65% | 65% | ↓ | → |
| 7 | Wither Hills | 70% | 67% | 63% | ↓ | ↓ |
| 8 | Mission Estate | 67% | 60% | 62% | ↓ | → |
| 9= | Selaks | 69% | 61% | 61% | ↓ | → |
| 9= | Cloudy Bay | 70% | 60% | 61% | ↓ | → |
| 11 | The Ned | 47% | 55% | 59% | ↑ | ↑ |
| 12 | Brancott Estate | 69% | 64% | 58% | ↓ | ↓ |
| 13= | Wolf Blass | 64% | 54% | 54% | ↓ | → |
| 13= | Banrock Station | 67% | 57% | 54% | ↓ | → |
| 15= | Shingle Peak | 63% | 56% | 53% | ↓ | → |

| Ranking '23 | | 2017 (n=1,000) | 2020 (n=1,002) | 2023 (n=1,017) | Tracking vs. '17 | Tracking vs. '20 |
|---|---|---|---|---|---|---|
| 15= | Penfolds | 63% | 55% | 53% | ↓ | → |
| 15= | Mud House | 52% | 51% | 53% | → | → |
| 18 | Peter Yealands | 55% | 53% | 50% | ↓ | → |
| 19 | Corbans | 69% | 57% | 49% | ↓ | ↓ |
| 20 | Brown Brothers | 46% | 44% | 48% | → | ↑ |
| 21 | Kim Crawford | 60% | 50% | 47% | ↓ | → |
| 22 | Matua | 58% | 46% | 45% | ↓ | → |
| 23= | Sacred Hill | 48% | 44% | 43% | → | → |
| 23= | Squealing Pig | n/a | n/a | 43% | n/a | n/a |
| 25 | Taylors | 40% | 35% | 41% | → | ↑ |
| 26= | Giesen | 33% | 34% | 40% | ↑ | ↑ |
| 26= | Morton Estate | 48% | 38% | 40% | ↓ | → |
| 28= | Lindeman's | 54% | 41% | 38% | ↓ | → |
| 28= | Hardys | 43% | 34% | 38% | ↓ | → |
| 30= | Nobilo | 50% | 40% | 37% | ↓ | → |

Note: Results for all brands available in the data table
Base: All New Zealand regular wine drinkers (n≥1,000); n/a: Brand not tracked that year; = represents equal ranking;
↑/↓: Statistically significantly higher/lower than the previous wave(s) at a 95% confidence level
Source: IWSR Vinitrac®, October 2017 (n=1,000), October 2020 (n=1,002) and November 2023 (n=1,017) New Zealand regular wine drinkers

# Brand purchase

## The range of brands bought by regular wine drinkers has decreased since 2017, although a higher proportion of them are now purchasing Oyster Bay

**Purchase: Tracking**

Percentage who have bought the following brands in the past three months

| Ranking '23 | | 2017 (n=1,000) | 2020 (n=1,002) | 2023 (n=1,017) | Tracking vs. '17 | Tracking vs. '20 |
|---|---|---|---|---|---|---|
| 1 | Jacob's Creek | 24% | 25% | 24% | → | → |
| 2= | Oyster Bay | 17% | 21% | 21% | ↑ | → |
| 2= | Villa Maria | 21% | 25% | 21% | → | → |
| 4= | The Ned | 12% | 17% | 15% | → | → |
| 4= | Church Road | 14% | 16% | 15% | → | → |
| 6 | Montana | 17% | 15% | 14% | → | → |
| 7 | Stoneleigh | 16% | 17% | 12% | ↓ | ↓ |
| 8 | Wither Hills | 16% | 15% | 11% | ↓ | ↓ |
| 9= | Mission Estate | 10% | 9% | 10% | → | → |
| 9= | Selaks | 12% | 12% | 10% | → | → |
| 9= | Mud House | 8% | 10% | 10% | → | → |
| 12= | Brown Brothers | 8% | 9% | 9% | → | → |
| 12= | Cloudy Bay | 10% | 8% | 9% | → | → |
| 12= | Squealing Pig | n/a | n/a | 9% | n/a | n/a |
| 12= | Wolf Blass | 12% | 10% | 9% | ↓ | → |

| Ranking '23 | | 2017 (n=1,000) | 2020 (n=1,002) | 2023 (n=1,017) | Tracking vs. '17 | Tracking vs. '20 |
|---|---|---|---|---|---|---|
| 12= | Shingle Peak | 10% | 10% | 9% | → | → |
| 17 | Brancott Estate | 8% | 8% | 8% | → | → |
| 18= | Penfolds | 5% | 6% | 6% | → | → |
| 18= | Giesen | 5% | 6% | 6% | → | → |
| 18= | Banrock Station | 10% | 8% | 6% | ↓ | ↓ |
| 18= | Peter Yealands | 12% | 11% | 6% | ↓ | ↓ |
| 22= | Kim Crawford | 11% | 7% | 5% | ↓ | ↓ |
| 22= | Taylors | 6% | 5% | 5% | → | → |
| 22= | McGuigan | 6% | 5% | 5% | → | → |
| 22= | Tohu | n/a | n/a | 5% | n/a | n/a |
| 26= | Sacred Hill | 5% | 4% | 4% | → | → |
| 26= | Matua | 6% | 5% | 4% | ↓ | → |
| 28= | Saint Clair | n/a | n/a | 3% | n/a | n/a |
| 28= | Dashwood | 4% | 4% | 3% | → | → |
| 30= | Ngatarawa | 6% | 3% | 3% | ↓ | → |

Note: Results for all brands available in the data table
Base: All New Zealand regular wine drinkers (n≥1,000); n/a: Brand not tracked that year; = represents equal ranking;
↑/↓: Statistically significantly higher/lower than the previous wave(s) at a 95% confidence level
Source: IWSR Vinitrac®, October 2017 (n=1,000), October 2020 (n=1,002) and November 2023 (n=1,017) New Zealand regular wine drinkers

# Brand conversion

## In line with increased purchase rates, the conversion incidence for Oyster Bay has increased. The Ned's conversion rate has fallen from its pandemic peak. Most brands have stable conversion rates

### Conversion: Tracking

Percentage who have bought the following brands in the past three months

| Ranking '23 | | 2017 | 2020 | 2023 | Tracking | |
|---|---|---|---|---|---|---|
| | | | | | vs. '17 | vs. '20 |
| 1 | Jacob's Creek | 28% | 31% | 31% | → | → |
| 2= | Villa Maria | 26% | 32% | 28% | → | → |
| 2= | Oyster Bay | 21% | 27% | 28% | ↑ | → |
| 4 | The Ned | 26% | 31% | 25% | → | ↓ |
| 5 | Church Road | 20% | 24% | 23% | → | → |
| 6= | Squealing Pig | n/a | n/a | 20% | n/a | n/a |
| 6= | Montana | 21% | 21% | 20% | → | → |
| 8 | Brown Brothers | 17% | 20% | 19% | → | → |
| 9= | Mud House | 16% | 19% | 18% | → | → |
| 9= | Stoneleigh | 22% | 24% | 18% | → | ↓ |
| 9= | Wither Hills | 22% | 22% | 18% | ↓ | → |
| 12= | Tohu | n/a | n/a | 16% | n/a | n/a |
| 12= | Shingle Peak | 17% | 18% | 16% | → | → |
| 12= | Mission Estate | 15% | 14% | 16% | → | → |
| 12= | Wolf Blass | 19% | 18% | 16% | → | → |

| Ranking '23 | | 2017 | 2020 | 2023 | Tracking | |
|---|---|---|---|---|---|---|
| | | | | | vs. '17 | vs. '20 |
| 12= | Jim Barry | n/a | n/a | 16% | n/a | n/a |
| 12= | Selaks | 17% | 19% | 16% | → | → |
| 18= | Cloudy Bay | 14% | 13% | 15% | → | → |
| 18= | McGuigan | 18% | 18% | 15% | → | → |
| 20= | Giesen | 15% | 18% | 14% | → | → |
| 20= | Earthworks | 10% | 16% | 14% | → | → |
| 22 | Brancott Estate | 11% | 13% | 13% | → | → |
| 23= | Dashwood | 14% | 16% | 12% | → | → |
| 23= | Ngatarawa | 16% | 12% | 12% | → | → |
| 23= | Taylors | 14% | 14% | 12% | → | → |
| 23= | Penfolds | 9% | 11% | 12% | → | → |
| 27= | Peter Yealands | 22% | 20% | 11% | ↓ | ↓ |
| 27= | George Wyndham | 13% | 14% | 11% | → | → |
| 27= | Chasseur | 7% | 8% | 11% | → | → |
| 27= | Kim Crawford | 18% | 15% | 11% | ↓ | → |

Note: Results for all brands available in the data table
Base: Those who have heard of each brand; n/a: Brand not tracked that year; = represents equal ranking; Grey shading = low sample size (n<50)
↑/↓: Statistically significantly higher/lower than the previous wave(s) at a 95% confidence level
Source: IWSR Vinitrac®, October 2017 (n=1,000), October 2020 (n=1,002) and November 2023 (n=1,017) New Zealand regular wine drinkers

# Brand consideration

## Consideration by those who are aware of a brand has declined for several of them, but especially for small and medium-sized brands; new drinkers coming into the category tend to stick to mainstream brands

### Consideration: Tracking

Percentage who would consider buying the following brands

| Ranking '23 | | 2017 | 2020 | 2023 | Tracking vs. '17 | Tracking vs. '20 |
|---|---|---|---|---|---|---|
| 1 | Oyster Bay | 66% | 64% | 59% | ↓ | ↓ |
| 2 | The Ned | 64% | 63% | 58% | → | → |
| 3 | Church Road | 61% | 61% | 56% | → | ↓ |
| 4= | Mud House | 56% | 57% | 54% | → | → |
| 4= | Villa Maria | 57% | 58% | 54% | → | → |
| 4= | Jacob's Creek | 52% | 57% | 54% | → | → |
| 7 | Cloudy Bay | 57% | 58% | 52% | → | ↓ |
| 8= | Mission Estate | 55% | 53% | 51% | → | → |
| 8= | Squealing Pig | n/a | n/a | 51% | n/a | n/a |
| 10 | Wither Hills | 55% | 51% | 49% | ↓ | → |
| 11 | Shingle Peak | 53% | 52% | 48% | → | → |
| 12= | Brown Brothers | 52% | 47% | 47% | → | → |
| 12= | Wolf Blass | 49% | 47% | 47% | → | → |
| 14 | Stoneleigh | 52% | 51% | 46% | ↓ | → |
| 15 | Tohu | n/a | n/a | 45% | n/a | n/a |

| Ranking '23 | | 2017 | 2020 | 2023 | Tracking vs. '17 | Tracking vs. '20 |
|---|---|---|---|---|---|---|
| 16 | Jim Barry | n/a | n/a | 44% | n/a | n/a |
| 17 | Ngatarawa | 56% | 46% | 43% | ↓ | → |
| 18= | Giesen | 50% | 46% | 42% | ↓ | → |
| 18= | Kim Crawford | 54% | 53% | 42% | ↓ | ↓ |
| 20 | Penfolds | 43% | 44% | 41% | → | → |
| 21= | Sacred Hill | 48% | 44% | 40% | ↓ | → |
| 21= | Dashwood | 44% | 43% | 40% | → | → |
| 23= | Selaks | 46% | 43% | 39% | ↓ | → |
| 23= | Saint Clair | n/a | n/a | 39% | n/a | n/a |
| 23= | Montana | 50% | 47% | 39% | ↓ | ↓ |
| 23= | Peter Yealands | 56% | 51% | 39% | ↓ | ↓ |
| 23= | Nautilus | 50% | 47% | 39% | ↓ | ↓ |
| 28= | Taylors | 44% | 40% | 38% | → | → |
| 28= | McGuigan | 39% | 42% | 38% | → | → |
| 30= | Matua | 45% | 49% | 37% | ↓ | ↓ |

Note: Results for all brands available in the data table
Base: Those who have heard of each brand; n/a: Brand not tracked that year; = represents equal ranking
↑/↓: Statistically significantly higher/lower than the previous wave(s) at a 95% confidence level
Source: IWSR Vinitrac®, October 2017 (n=1,000), October 2020 (n=1,002) and November 2023 (n=1,017) New Zealand regular wine drinkers

# Brand affinity

## Several brands have a lower affinity incidence among those who are aware of them, which indicates the connection that those drinkers have with a particular brand is waning

### Affinity: Tracking

Percentage who think the following brands are right for people like them

| Ranking '23 | | 2017 | 2020 | 2023 | Tracking | |
|---|---|---|---|---|---|---|
| | | | | | vs. '17 | vs. '20 |
| 1 | Oyster Bay | 49% | 52% | 47% | → | ↓ |
| 2 | The Ned | 49% | 54% | 46% | → | ↓ |
| 3= | Jacob's Creek | 42% | 45% | 44% | → | → |
| 3= | Jim Barry | n/a | n/a | 44% | n/a | n/a |
| 5 | Cloudy Bay | 45% | 45% | 43% | → | → |
| 6= | Villa Maria | 43% | 46% | 42% | → | → |
| 6= | Church Road | 46% | 47% | 42% | → | → |
| 6= | Squealing Pig | n/a | n/a | 42% | n/a | n/a |
| 6= | Mud House | 41% | 45% | 42% | → | → |
| 10 | Brown Brothers | 44% | 39% | 40% | → | → |
| 11 | Mission Estate | 42% | 40% | 39% | → | → |
| 12 | Wither Hills | 47% | 40% | 37% | ↓ | → |
| 13 | Wolf Blass | 38% | 34% | 36% | → | → |
| 14= | Ngatarawa | 43% | 36% | 35% | ↓ | → |
| 14= | Shingle Peak | 40% | 38% | 35% | ↓ | → |

| Ranking '23 | | 2017 | 2020 | 2023 | Tracking | |
|---|---|---|---|---|---|---|
| | | | | | vs. '17 | vs. '20 |
| 16 | Stoneleigh | 36% | 39% | 34% | → | ↓ |
| 17 | Kim Crawford | 42% | 39% | 33% | ↓ | → |
| 18= | Giesen | 40% | 39% | 32% | ↓ | → |
| 18= | Tohu | n/a | n/a | 32% | n/a | n/a |
| 20= | Montana | 36% | 37% | 31% | → | ↓ |
| 20= | Taylors | 30% | 27% | 31% | → | → |
| 20= | Penfolds | 29% | 34% | 31% | → | → |
| 23= | Selaks | 29% | 31% | 30% | → | → |
| 23= | Sacred Hill | 36% | 32% | 30% | → | → |
| 25= | Dashwood | 34% | 32% | 29% | → | → |
| 25= | Peter Yealands | 45% | 39% | 29% | ↓ | ↓ |
| 27 | Saint Clair | n/a | n/a | 28% | n/a | n/a |
| 28= | George Wyndham | 28% | 30% | 27% | → | → |
| 28= | McGuigan | 30% | 30% | 27% | → | → |
| 28= | Nautilus | 38% | 35% | 27% | ↓ | → |

Note: Results for all brands available in the data table
Base: Those who have heard of each brand; n/a: Brand not tracked that year; = represents equal ranking
↑/↓: Statistically significantly higher/lower than the previous wave(s) at a 95% confidence level
Source: IWSR Vinitrac®, October 2017 (n=1,000), October 2020 (n=1,002) and November 2023 (n=1,017) New Zealand regular wine drinkers

# Brand recommendation

## Recommendation levels are broadly stable, though the proportion of those who are aware of Cloudy Bay and would recommend it to a friend has increased since 2017

### Recommendation: Tracking

Percentage who would recommend the following brands to a friend

| Ranking '23 | | 2017 | 2020 | 2023 | Tracking | |
|---|---|---|---|---|---|---|
| | | | | | vs. '17 | vs. '20 |
| 1= | Jim Barry | n/a | n/a | 43% | n/a | n/a |
| 1= | Oyster Bay | 45% | 45% | 43% | → | → |
| 3= | The Ned | 42% | 44% | 40% | → | → |
| 3= | Cloudy Bay | 34% | 36% | 40% | ↑ | → |
| 5 | Church Road | 39% | 39% | 38% | → | → |
| 6 | Villa Maria | 37% | 38% | 37% | → | → |
| 7 | Mission Estate | 37% | 32% | 35% | → | → |
| 8 | Brown Brothers | 38% | 34% | 34% | → | → |
| 9= | Squealing Pig | n/a | n/a | 33% | n/a | n/a |
| 9= | Jacob's Creek | 29% | 33% | 33% | → | → |
| 9= | Mud House | 32% | 39% | 33% | → | ↓ |
| 12 | Wolf Blass | 28% | 28% | 31% | → | → |
| 13 | Wither Hills | 34% | 30% | 30% | → | → |
| 14 | Tohu | n/a | n/a | 29% | n/a | n/a |
| 15= | Kim Crawford | 31% | 27% | 27% | → | → |
| 15= | Stoneleigh | 30% | 28% | 27% | → | → |
| 17= | Shingle Peak | 28% | 27% | 25% | → | → |
| 17= | Penfolds | 22% | 26% | 25% | → | → |
| 19= | Ngatarawa | 34% | 28% | 24% | ↓ | → |
| 19= | Taylors | 23% | 20% | 24% | → | → |
| 21= | Mouton Cadet | 15% | 12% | 23% | → | → |
| 21= | Giesen | 30% | 29% | 23% | ↓ | → |
| 23= | Montana | 23% | 24% | 22% | → | → |
| 23= | Yalumba | 20% | 19% | 22% | → | → |
| 23= | McGuigan | 21% | 22% | 22% | → | → |
| 26= | Sileni | n/a | n/a | 21% | n/a | n/a |
| 26= | Monkey Bay | 19% | 19% | 21% | → | → |
| 26= | Saint Clair | n/a | n/a | 21% | n/a | n/a |
| 26= | Matua | 21% | 24% | 21% | → | → |
| 26= | Nautilus | 28% | 25% | 21% | ↓ | → |

Note: Results for all brands available in the data table
Base: Those who have heard of each brand; n/a: Brand not tracked that year; = represents equal ranking
↑/↓: Statistically significantly higher/lower than the previous wave(s) at a 95% confidence level
Source: IWSR Vinitrac®, October 2017 (n=1,000), October 2020 (n=1,002) and November 2023 (n=1,017) New Zealand regular wine drinkers

# Research Methodology

# Research methodology

## Quantitative

Data was collected in New Zealand since October 2014,

The October 2017 and October 2020 waves were tracked against November 2023.

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

Respondents were screened to ensure that they were: at least 18 years old; drank red, white, rosé or blush wine at least once a month; and bought wine in the off-trade or in the on-trade.

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.

| | | *Oct-17* | *Oct-20* | *Nov-23* |
|---|---|---|---|---|
| | *n=* | *1,000* | *1,002* | *1,017* |
| **Gender*** | Male | 49% | 47% | 49% |
| | Female | 51% | 53% | 51% |
| | ***Total*** | ***100%*** | ***100%*** | ***100%*** |
| **Age** | 18-24 | 8% | 11% | 7% |
| | 25-34 | 16% | 22% | 17% |
| | 35-44 | 16% | 12% | 16% |
| | 45-54 | 17% | 18% | 17% |
| | 55 and over | 43% | 37% | 42% |
| | ***Total*** | ***100%*** | ***100%*** | ***100%*** |
| **Region** | Auckland | 38% | 42% | 37% |
| | Wellington | 11% | 10% | 9% |
| | Rest of North Island | 29% | 27% | 28% |
| | Canterbury | 13% | 12% | 14% |
| | Rest of South Island | 9% | 9% | 11% |
| | ***Total*** | ***100%*** | ***100%*** | ***100%*** |

*Please note that additional Gender categories were also surveyed. These categories fell naturally in the sample and were not enforced via quotas
**'Prefer not to answer' in Income fell naturally in the sample
Source: IWSR Vinitrac®, October 2017 (n=1,000), October 2020 (n=1,002) and November 2023 (n=1,017) New Zealand regular wine drinkers

# About
# IWSR Drinks Market Analysis

IWSR

drinks market analysis

IWSR is the leading source of data and intelligence on the beverage alcohol market. The IWSR database, essential to the industry, quantifies the global market of wine, spirits, beer, cider and RTDs (ready-to-drink) by volume and value in 160 countries, and provides insight into short- and long-term trends, including five-year volume and value forecasts, as well as consumer behaviour. IWSR tracks overall consumption and trends at brand, price segment and category level. Our data is used by the major international wine, spirits and beer companies, as well as financial and beverage-alcohol market suppliers.

IWSR's unique methodology allows us to get closer to what is actually consumed and better understand how markets work. IWSR boasts a team of global analysts, each of whom is equipped with local market expertise and an expansive network of on-the-ground industry contacts. Our analysts meet and speak with their industry contacts throughout the year to capture local insight, key market trends, and the 'why' behind the numbers.

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