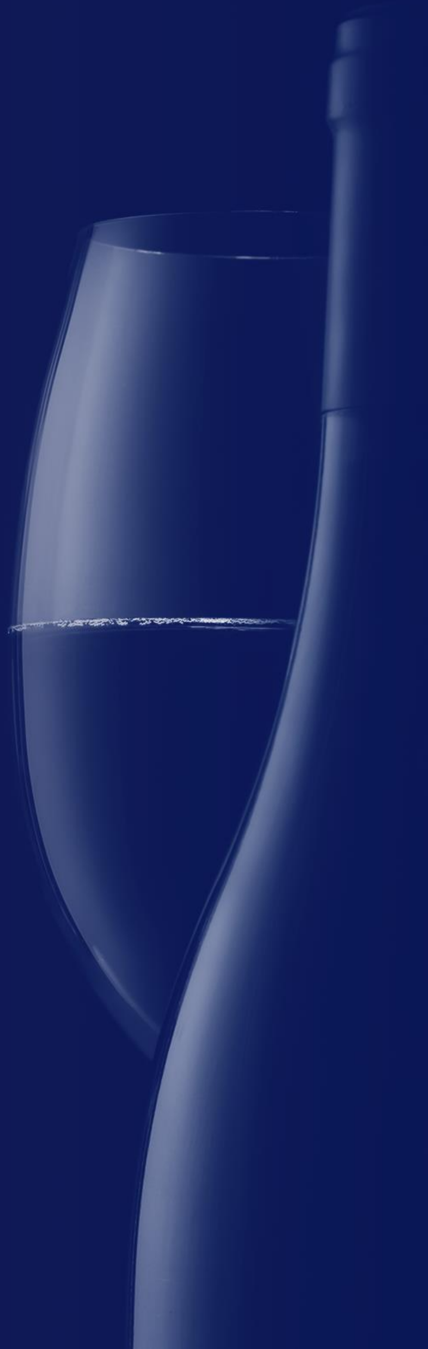
IWSR
drinks market analysis

Australia

Wine Landscapes 2023



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IWSR Viewpoint

A post-pandemic 'new normal' has emerged in the Australian market, characterised by fewer wine drinkers overall. However, those who continue to engage with the category display a high level of enthusiasm for wine.

The wine-drinking population in Australia has shrunk from its pre-pandemic level. Since 2019, the monthly wine-drinking population in Australia has dwindled by 500,000, leaving the category with 8.6 million regular consumers. The reduced size of the wine drinking population has had an impact on the volume of still wine sold, with a 3% decline between 2017 and 2022.

The proportion of regular wine drinkers who report drinking wine daily has declined significantly since 2022, reverting to levels seen in 2019. One notable reason is the adoption of a 'less-but-better' approach to the category, identified by the increase in the consumption of wines priced at AU$23 or higher. Not only this but regular wine drinkers are spending significantly more than in 2019 across all off-premise and on-premise settings. This 'less-but-better' trend aligns with developments observed in other mature wine markets globally.

The decline in volume consumption may also be linked to regular wine drinkers feeling more economic pressure than in the previous year. Australian regular wine drinkers express less confidence about their economic situation than in 2022, with a higher proportion reporting financial concerns. This is likely to have a knock-on effect for the wine industry within this market.

Furthermore, a short-term factor influencing consumption of still wine is the significantly lower proportion of male drinkers involved with the category than in 2022. As this demographic are typically more frequent drinkers of still wine than regular wine drinkers in Australia, this will likely have an impact on still wine volumes.

However, there are positives to be had in this market. Those who have stayed in the market appear to be highly engaged with the category and are regularly willing to be experimental with their selections.

The "less but better" approach will provide premium wines with more opportunities among this engaged wine category both in the on- and on-ff premise, thanks to the recovering on-premise and continued increase in frequency by occasion.

Finally, the removal of Australian wine tariffs implemented in China look likely in the next year, though it will take time for the Australian producers to truly capitalise given change in market.

Opportunities

- Sustained higher involvement
- Return to bricks-and-mortar
- Premiumisation
- On-premise recovery sustained
- Removal of tariffs on Australian wine in China likely in 2024
- Increased tourism to enable brand connection

Threats

- Waning wine drinking population
- Fall in frequent wine drinkers
- Reduced wine knowledge
- Economic and political pressures
- RTDs and spirits targeting wine consumption occasions with innovation and activation

Management Summary

Key takeaways

1. Wine drinking population is shrinking

2. Wine volume in decline

3. ‘Less-but-better’ trend evident

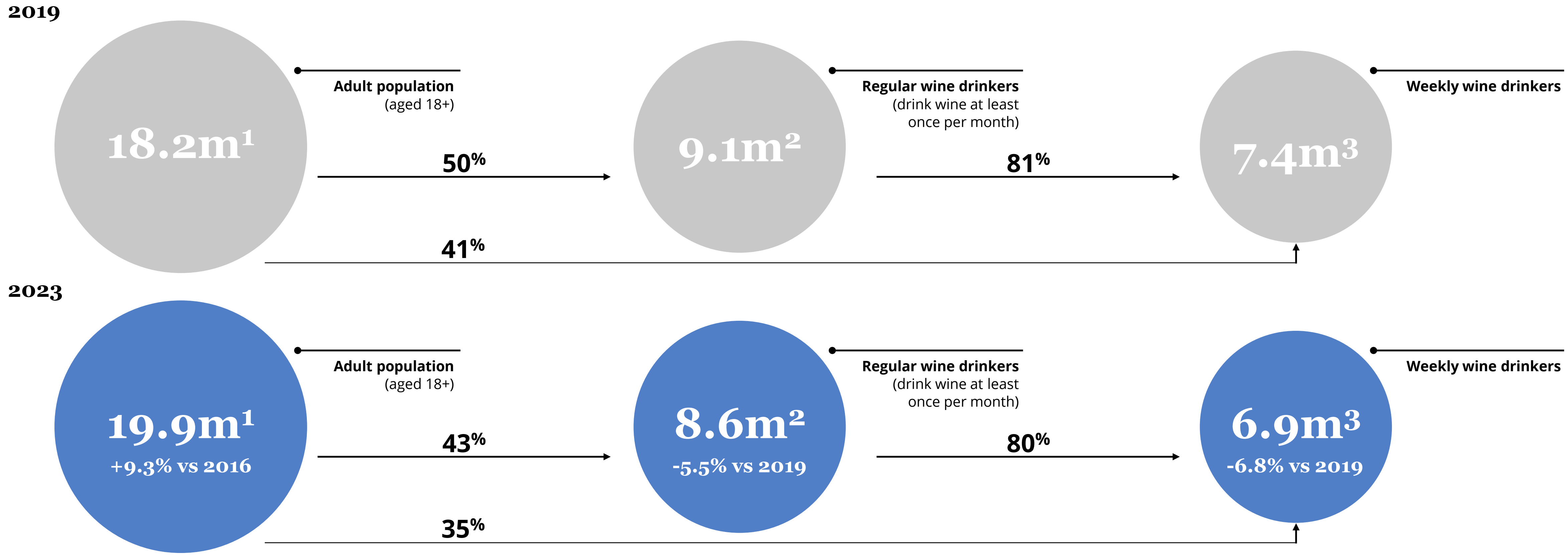
4. Drinkers’ attitudes remain stable

5. Lower proportion of daily drinkers

6. Boomers and Gen X buying less wine

1. Wine drinking population is shrinking

The monthly and weekly wine drinking populations have shrunk by 5.5% and 6.8% respectively; this is the result of lower participation among all adults within the wine category



1 2016, 2021 Census data- Australian Bureau of Statistics
2 Wine Intelligence online calibration study, September 2019, rolling average of May 2022 and May 2023 (n=2,503) Australian adults. Wine=still light wine (red, white, rosé)
3 Wine Intelligence, Vinitrac® Australia, July 2020 and July 2023 (n≥1,000), Australia regular wine drinkers

2. Wine volume in decline

The volume of wine sold in Australia has declined, most likely because of a shrinking wine drinking population and a 'less-but better' trend among Australian wine drinkers

Total beverage alcohol market volumes by category

000s 9-litre cases

	2021	2022	CAGR 17-22	CAGR F 22-27
Total beverage alcohol	305,533.45	309,083.82	0.4%	-0.1%
Beer	188,881.89	192,017.78	0.2%	-0.7%
Wine*	55,115.83	53,352.59	-2.3%	-1.2%
RTDs	37,905.35	40,666.95	5.9%	3.8%
Cider	13,106.56	12,628.44	-2.3%	-0.9%
Spirit**	10,523.83	10,418.06	6.3%	2.4%

Market context

"Total wine volumes have been declining for a few years in line with falling consumption. Younger LDA+ consumers are less inclined to drink wine than older generations were."

Executive Summary Report 2023, Australia

"Wine is declining as consumers look to alternative alcohol categories, as evidenced by growth in RTDs and spirits."

Market expert

*Wine includes still wine, sparkling wine, fortified wine and light aperitifs
**Spirits include whisky, gin and genever, vodka, agave-based spirits, national spirits, rum
Source: IWSR

3. ‘Less-but-better’ trend evident

The wine category in Australia continues to premiumise, with the volume sold at AU$23 or more increasing from 2017–22; a combination of lower volumes and higher spends indicates a broader trend of ‘less-but-better’

Off-premise & on-premise: Typical spend per bottle by occasion

Those who buy wine in the off-premise or on-premise (AU$)

Off-premise occasions	2019 (n=1,000)	2022 (n=1,008)	2023 (n=1,008)	Tracking vs. '19	Tracking vs. '22
A relaxing drink at the end of the day at home	$ 13.59	$ 15.16	$ 15.91	↑	↑
With an informal meal at home	$ 13.79	$ 15.38	$ 16.45	↑	↑
With a more formal dinner party at home	$ 18.45	$ 18.60	$ 20.34	↑	↑
At a party / celebration at home	$ 16.11	$ 17.50	$ 18.76	↑	↑
As a gift for somebody	$ 22.35	$ 22.03	$ 24.25	↑	↑

On-premise occasions					
A relaxing drink out at the end of the day	$ 20.24	$ 23.47	$ 24.07	↑	→
With an informal meal in a pub / bar / restaurant / bistro	$ 21.65	$ 25.05	$ 26.83	↑	↑
With a more formal dinner in a restaurant	$ 26.52	$ 28.32	$ 31.68	↑	↑
At a party / celebration / big night out	$ 23.66	$ 25.91	$ 27.91	↑	↑

Still wine by price band

000s 9-litre cases

	2021	2022	CAGR 17-22	CAGR F 22-27
Low-Price (under AUD 5.00)	6,938.50	7,220.00	-6.4%	-5.0%
Value (between AUS 5.00 and 7.99)	5,181.40	5,319.70	0.0%	-3.6%
Standard (between AUS 8.00 and 14.99)	19,998.20	18,631.73	-4.4%	-2.4%
Premium (between AUD 15.00 and 22.99)	10,995.70	10,732.40	-0.2%	0.2%
Super Premium (between AUD 23.00 to 34.99)	2,602.03	2,715.90	0.9%	2.4%
Ultra Premium (between AUD 35.00 to 54.99)	596.32	606.25	4.8%	3.8%
Prestige (AUD 55.00 and above)	238.02	245.90	4.4%	4.3%

Market context

“As consumers drink less, they spend more on higher-quality wines. As a result, premium-and-above wines are growing as standard-and-below segments decline.“

Executive Summary Report 2023, Australia

Base: All Australian regular wine drinkers (n≥1,000)
↑/↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: IWSR, Vinitrac® Australia, July 2019, July 2022 and July 2023 (n≥1,000), Australian regular wine drinkers

4. Drinkers' attitudes remain stable

A long-term trend of increased engagement among those who remain in the wine category is continuing, with little change between 2022 and 2023

Attitudes towards wine: Tracking

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

	2019 (n=1,000)	2022 (n=1,008)	2023 (n=1,008)	Tracking vs. '19	Tracking vs. '22
I enjoy trying new and different styles of wine on a regular basis	40%	47%	48%	↑	→
I don't mind what I buy so long as the price is right	29%	26%	23%	↓	→
I know what I like and I tend to stick to what I know	31%	28%	29%	→	→

Wine involvement: Tracking

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

	2019 (n=1,000)	2022 (n=1,008)	2023 (n=1,008)	Tracking vs. '19	Tracking vs. '22
High involvement	31%	42%	40%	↑	→
Medium involvement	40%	38%	39%	→	→
Low involvement	29%	19%	21%	↓	→

Base: All Australian regular wine drinkers (n≥1,000)
↑/↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: IWSR, Vinitrac® Australia, July 2019, July 2022 and July 2023 (n≥1,000), Australian regular wine drinkers

5. Lower proportion of daily drinkers

The post-pandemic peak of daily consumption appears to have waned among respondents in Australia. This is likely due to reduced financial confidence, along with wider moderation trends

Wine consumption frequency: Tracking

Percentage who usually drink wine at the following frequency

	2019 (n=1,000)	2022 (n=1,008)	2023 (n=1,008)	Tracking vs. '19	Tracking vs. '22
Most days / every day	13%	17%	13%	→	↓
2-5 times a week	33%	38%	40%	↑	→
About once a week	28%	27%	27%	→	→
1-3 times a month	27%	18%	20%	↓	→

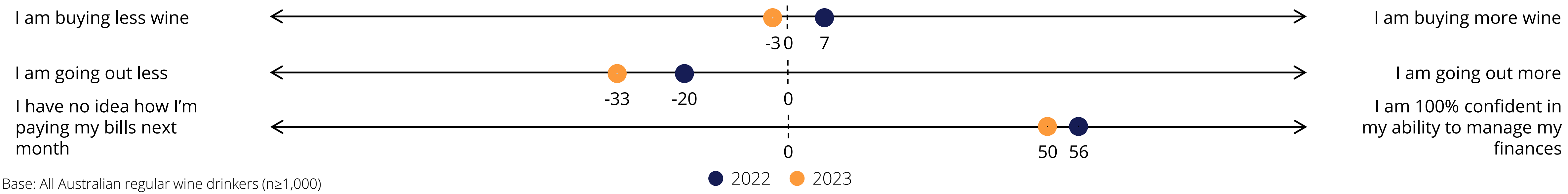
Market context

"Still wine declined in line with long-term moderation trends."

Executive Summary Report 2023, Australia

Consumer sentiment: spending and wine, tracked

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



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

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

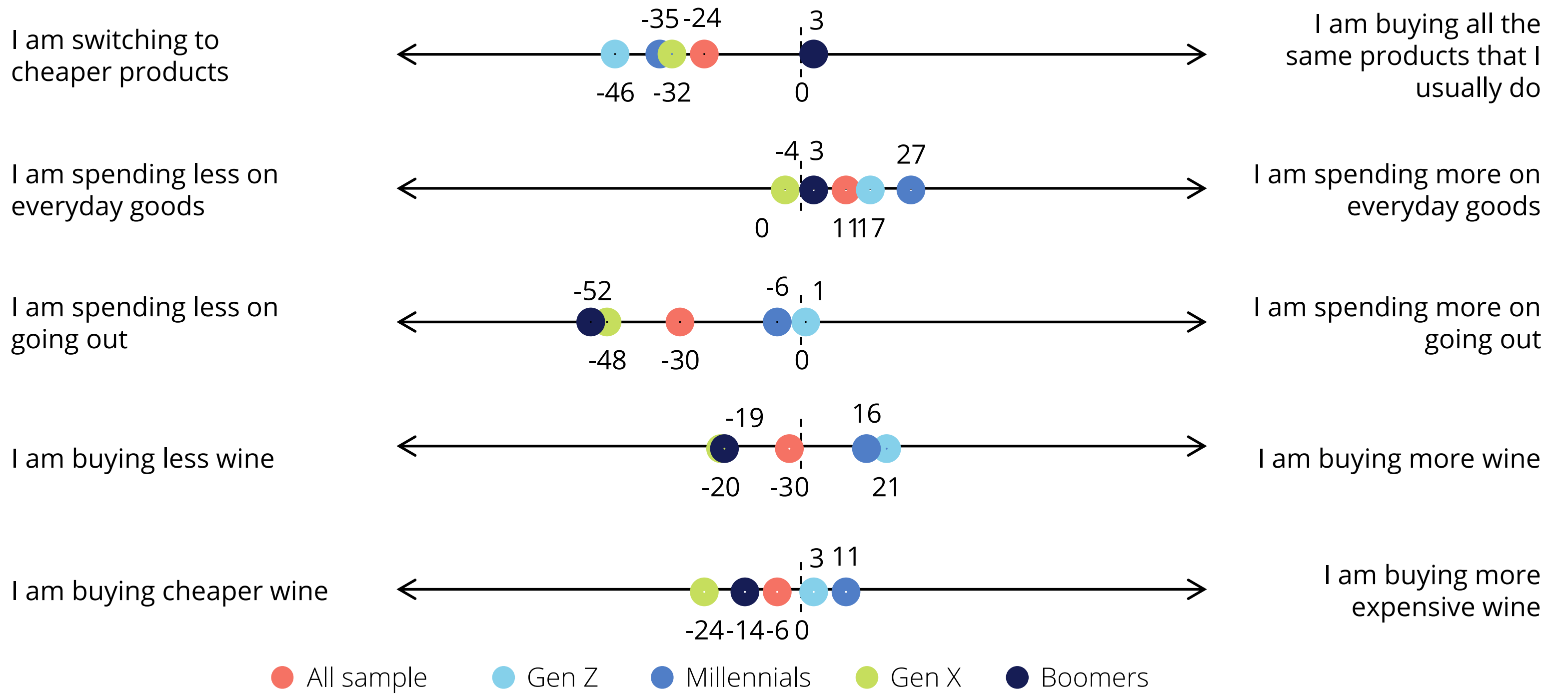
Source: IWSR, Vinitrac® Australia, Jul 2019, Jul 2022 and Jul 2023 (n≥1,000), Australian regular wine drinkers

6. Boomers and Gen X buying less wine

Older drinkers are purchasing wine less often and buying cheaper wine when they do, despite feeling less of a financial hit than younger LDA+ consumers

Consumer sentiment: spending and wine

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



Market context

"We are seeing an 'hourglass effect', particularly in Australian wine, where value and low-price bands are seeing growth, alongside super-premium and higher."

Executive Summary Report 2023, Australia

Base: All Australian regular wine drinkers (n=1,008)
Source: IWSR, Vinitrac® Australia, Jul '23 (n=1,008), Australian regular wine drinkers

Management summary: tracking metrics

The alcohol repertoires of regular wine drinkers is narrowing; fewer are buying domestically produced wine

Top alcoholic beverages

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

	2019	2023	Tracking
Red wine	80%	75%	↓
White wine	80%	75%	↓
Beer	67%	57%	↓
Whisky / Whiskey	45%	36%	↓
Sparkling wine from Australia	46%	35%	↓

Top country of origin

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

	2019	2023	Tracking
Australia	86%	80%	↓
New Zealand	40%	37%	→
France	29%	25%	→
Italy	22%	19%	→
Spain	11%	9%	→

Top region of origin

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

	2019	2023	Tracking
Barossa Valley	27%	22%	↓
Hunter Valley	22%	18%	↓
Margaret River	24%	18%	↓
South Australia	17%	17%	→
Yarra Valley	14%	14%	→

Top wine brands

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

	2019	2023	Tracking
Jacob's Creek	28%	21%	↓
Brown Brothers	22%	20%	→
Penfolds	18%	16%	→
Yellow Tail	18%	16%	→
Wolf Blass	20%	15%	↓

Base: All Australian regular wine drinkers (n≥1,000)
↑/↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: IWSR, Vinitrac® Australia, Jul '19, Jul '23 (n≥1,000), Australian regular wine drinkers

Management Summary: tracking metrics

Regular wine drinkers in Australia are consuming a narrower range of varietals in both red and white wine, and purchasing from a smaller range of channels and retailers; these trends appeared in 2022 and are persisting

Top red varietals

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

	2019	2023	Tracking
Shiraz / Syrah	49%	42%	↓
Cabernet Sauvignon	50%	40%	↓
Merlot	48%	37%	↓
Pinot Noir	39%	35%	→
Cabernet Sauvignon / Merlot blend	39%	30%	↓

Top wine-buying channels

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

	2019	2023	Tracking
Local bottle shop	59%	48%	↓
In the supermarket-attached liquor store	58%	45%	↓
Large national discount wine & drinks store	38%	31%	↓
From a specialist wine shop	16%	15%	→
From an online retailer	16%	15%	→

Top white varietals

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

	2019	2023	Tracking
Sauvignon Blanc	57%	48%	↓
Chardonnay	49%	38%	↓
Pinot Grigio / Pinot Gris	34%	33%	→
Moscato	34%	26%	↓
Riesling	32%	25%	↓

Top wine-buying retailers

Percentage who mainly use the following retailers to buy wine

	2019	2023	Tracking
Dan Murphy's	54%	48%	↓
BWS	47%	43%	→
Liquorland / Liquorland Express	35%	27%	↓
Aldi	18%	13%	↓
First Choice Liquor	10%	12%	→

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Source: IWSR, Vinitrac® Australia, Jul '19, Jul '23 (n≥1,000), Australian regular wine drinkers

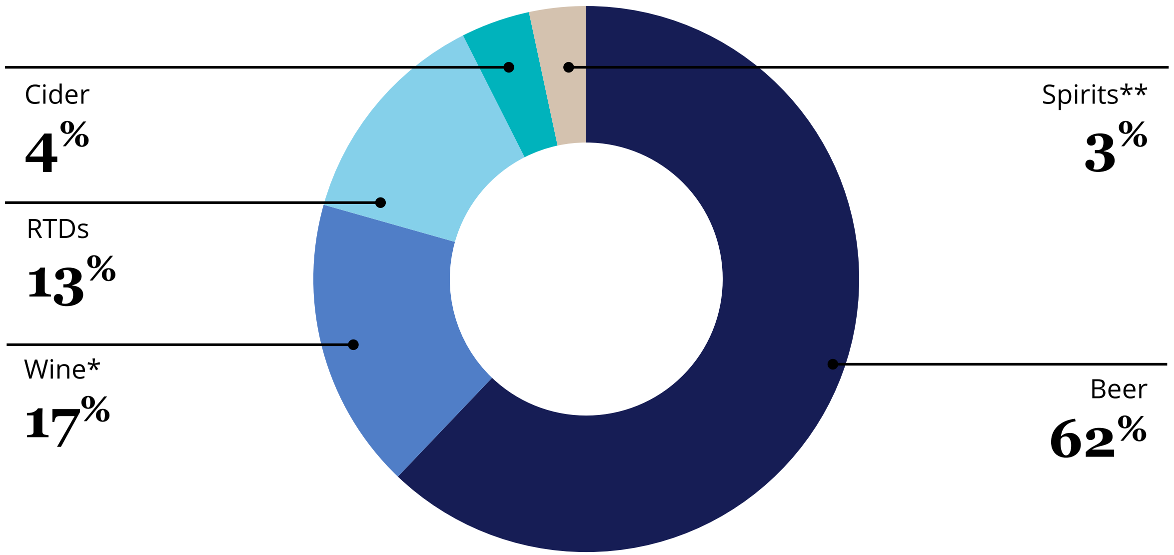
Market Data

TBA market share by category

Wine is the second largest drinks category in the Australian market, although the volume of wine sold declined between 2017 and 2022, a trend that is forecast to continue

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

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RTDs	37,905.35	40,666.95	5.9%	3.8%
Cider	13,106.56	12,628.44	-2.3%	-0.9%
Spirit**	10,523.83	10,418.06	6.3%	2.4%

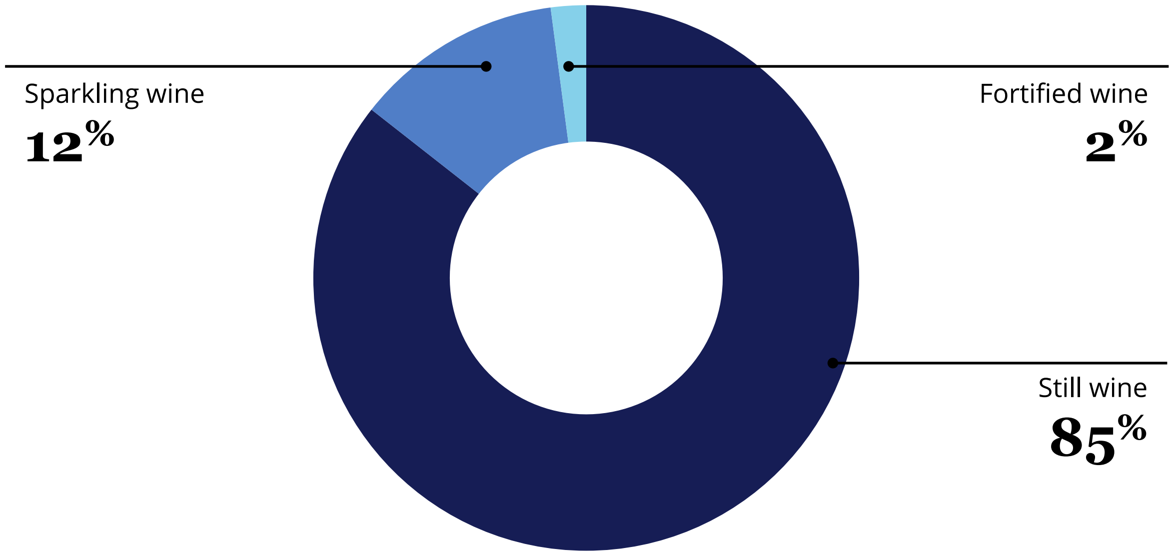
*Wine includes still wine, sparkling wine, fortified wine and light aperitifs
**Spirits include whisky, gin and genever, vodka, agave-based spirits, national spirits, rum
Source: IWSR

Total wine market volumes

Still wine makes up 85% of the total wine market, although volumes sold declined between 2017 and 2022. Sparkling wine growth over the same period is a positive sign for the category

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	55,115.83	53,352.59	-2.3%	-1.2%
Still Wine	46,550.17	45,471.88	-3.0%	-1.8%
Sparkling Wine	7,172.16	6,551.30	2.5%	2.2%
Fortified Wine	1,180.35	1,109.09	-1.9%	-1.3%
Light Aperitifs	134.15	134.92	3.3%	1.2%
Other Wines	79.00	85.40	11.5%	4.8%

*Other Wines includes non-grape based wines
Source: IWSR

Still wine volumes by origin

Volumes of Australian and New Zealand still wine declined between 2017 and 2022, while countries in Europe and the Americas grew share from smaller bases

Total still wine volumes and market share by origin

000s 9-liter cases

		2021	2022	CAGR 17-22	CAGR F 22-27	Market Share
	Total	46,550.17	45,471.88	-3.0%	-1.8%	
1	Australian	38,016.05	37,324.72	-3.3%	-2.4%	82%
2	New Zealand	5,682.99	5,403.46	-3.2%	-0.2%	12%
3	French	1,140.30	1,078.05	2.7%	2.8%	2%
4	Italian	676.30	664.45	2.6%	2.6%	1%
5	Spanish	262.56	265.25	1.6%	0.2%	1%
6	US	201.21	207.55	37.7%	3.9%	0%
7	Argentinian	133.51	126.05	6.0%	2.3%	0%
8	Chilean	141.55	119.60	3.2%	3.6%	0%
9	International*	89.50	85.75	12.1%	-2.1%	0%
10	South African	83.75	76.40	-5.2%	-1.1%	0%

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

Still wine retail price by origin

The average retail price for a standard bottle of wine has increased across almost all countries of origin in the Australian market, with wine from the US the only exception

Historic and forecast growth: Retail price

Five-year CAGR % calculated using a variable exchange rate

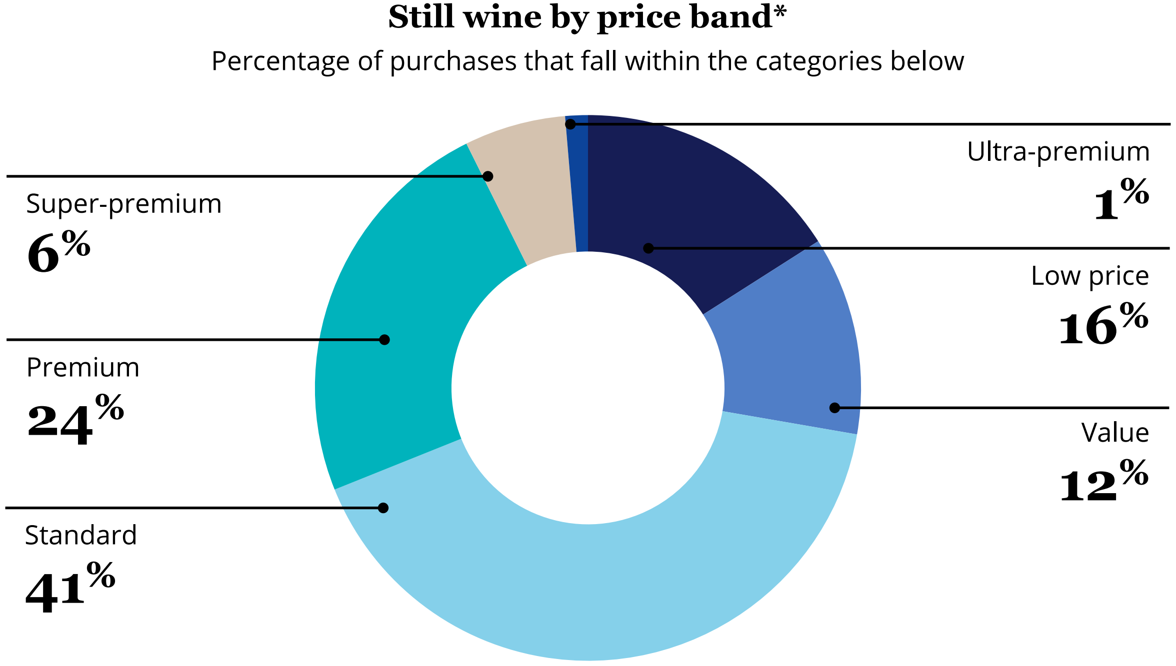
		Retail price per 0.75l 2022 (US$)	CAGR 17-22	CAGR F 22-27
	Total	8.30	3.1%	1.4%
1	Australian	7.20	2.8%	1.2%
2	New Zealand	10.85	2.1%	0.5%
3	French	22.60	2.5%	0.3%
4	Italian	22.19	1.6%	0.6%
5	Spanish	10.96	4.0%	0.7%
6	US	11.91	-0.1%	0.8%
7	Argentinian	12.36	4.0%	0.9%
8	Chilean	11.05	4.4%	1.0%
9	International*	6.71	1.5%	0.0%
10	South African	9.33	2.5%	-0.2%

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

Source: IWSR

Still wine by price band

Standard wine is the largest price band, but super-premium wine grew between 2017 and 2022; this is forecast to continue from 2022–27



Still wine by price band

000s 9-litre cases

	2021	2022	CAGR 17-22	CAGR F 22-27
Low-Price (under AUD 5.00)	6,938.50	7,220.00	-6.4%	-5.0%
Value (between AUS 5.00 and 7.99)	5,181.40	5,319.70	0.0%	-3.6%
Standard (between AUS 8.00 and 14.99)	19,998.20	18,631.73	-4.4%	-2.4%
Premium (between AUD 15.00 and 22.99)	10,995.70	10,732.40	-0.2%	0.2%
Super Premium (between AUD 23.00 to 34.99)	2,602.03	2,715.90	0.9%	2.4%
Ultra Premium (between AUD 35.00 to 54.99)	596.32	606.25	4.8%	3.8%
Prestige (AUD 55.00 and above)	238.02	245.90	4.4%	4.3%

*Ultra-premium and Prestige omitted from pie chart due to small market share (<1%)
Source: IWSR

Still wine consumption per capita

Per capita consumption of still wine declined between 2017 and 2022, though Australia remains 26th in the global ranking. Many of the top countries for per capita consumption also declined over the same 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	-5.5%	5.7%
2	Portugal	43.00	45.71	-0.9%	6.3%
3	Montenegro	41.76	42.62	-1.1%	1.8%
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	4.7%	10.1%
7	Switzerland	36.14	34.94	-1.0%	-2.7%
8	France	35.71	33.93	-4.8%	-4.6%
9	Greece	27.95	33.79	0.2%	20.6%
10	Hungary	31.52	32.65	0.4%	3.4%
11	Denmark	33.37	30.99	-0.6%	-6.6%
12	Austria	30.93	30.12	-0.9%	-2.3%
13	Turks and Caicos	27.56	30.08	-0.7%	11.5%
14	Romania	27.55	27.87	-1.1%	-0.1%
15	US Virgin Islands	27.78	27.86	-2.7%	0.1%
26	Australia	20.87	20.11	-3.0%	-2.3%

Source: IWSR

Sparkling wine volumes by origin

Sparkling wine has been a growth category over the past five years, driven by increases in Australian and European wine

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	7,172.16	6,551.30	2.5%	2.2%	
1	Australian	4,782.90	4,217.05	0.9%	1.7%	64%
2	Italian	1,006.15	1,029.02	8.5%	5.5%	16%
3	French	1,035.50	987.85	4.3%	1.7%	15%
4	New Zealand	133.20	116.75	-1.2%	-4.9%	2%
5	German	92.50	90.25	6.5%	1.2%	1%
6	Spanish	77.60	75.07	4.6%	4.3%	1%
7	International*	36.20	30.80	6.0%	-6.1%	0%
8	South African	2.00	2.16	-6.4%	1.4%	0%
9	Chilean	5.00	1.70	-19.4%	0.0%	0%
10	Argentinian	0.25	0.25	0.0%	0.0%	0%

Market context

"The category attracts a range of demographics, and the consumption occasion has broadened from special occasions to informal social gatherings and brunches."

Executive Summary Report 2023, Australia

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

Sparkling wine retail price by origin

The retail price for a standard bottle of sparkling wine in Australia has increased across origins, most notably for French and domestic sparkling wines

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	15.23	4.0%	0.1%
1	Australian	10.34	2.8%	0.6%
2	Italian	10.02	2.9%	0.5%
3	French	42.70	4.4%	-0.1%
4	New Zealand	14.41	4.5%	3.7%
5	German	10.32	1.3%	0.0%
6	Spanish	10.54	1.1%	0.1%
7	International*	8.08	1.8%	-0.8%
8	South African	8.56	-3.8%	0.8%
9	Chilean	10.40	0.0%	0.0%
10	Argentinian	11.85	1.3%	0.0%

Market context

"A premiumisation trend is apparent, with many locally produced standard-and-below brands declining."

Executive Summary Report 2023, Australia

"French sparkling wine prices increased due to historical Champagne supply constraints that should ease in the next few years."

Market expert

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

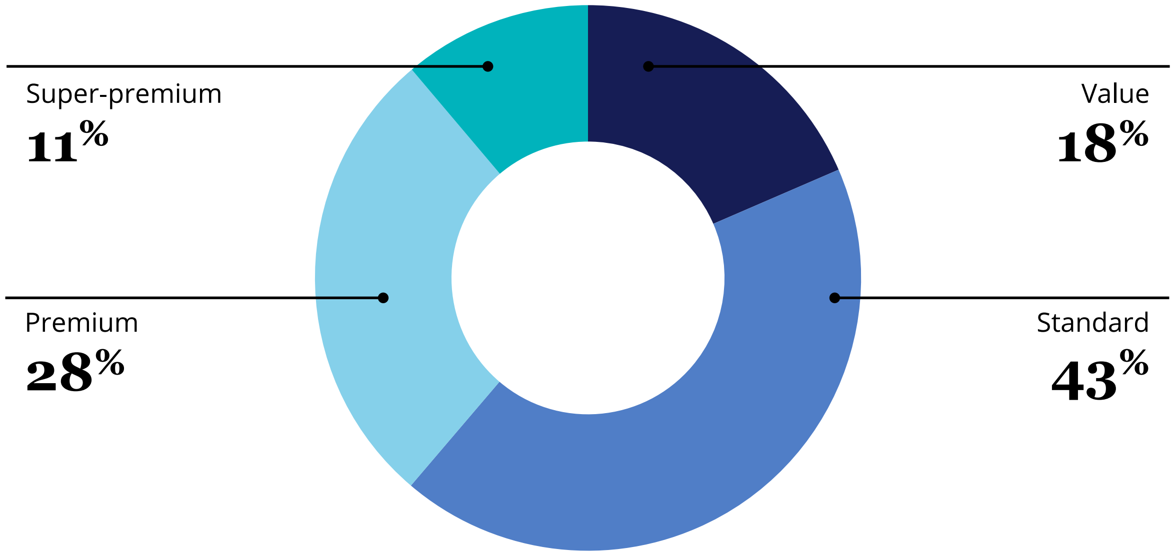
Source: IWSR

Sparkling wine by price band

There is evidence of premiumisation in the sparkling wine category, with large increases in volumes sold at premium price points and above

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 AUD 7.99)	1,531.55	1,050.90	-7.3%	0.7%
Standard (between AUS 8.00 and 14.99)	2,571.61	2,426.87	1.6%	1.1%
Premium (between AUD 15.00 and 22.99)	1,541.74	1,567.66	15.0%	4.5%
Super Premium (between AUD 23.00 to 34.99)	637.91	634.20	2.1%	2.1%
Ultra Premium (AUD 35.00 to 54.99)	9.20	20.27	14.3%	21.9%
Prestige (AUD 55.00 and above)	0.65	0.60	24.6%	21.7%

Market context

"Sparkling wine will continue to grow longer term as it offers affordable indulgence. Italian Prosecco will be a key driver in absolute terms, but premium-and-above local wines will also benefit."

Executive Summary Report 2023, Australia

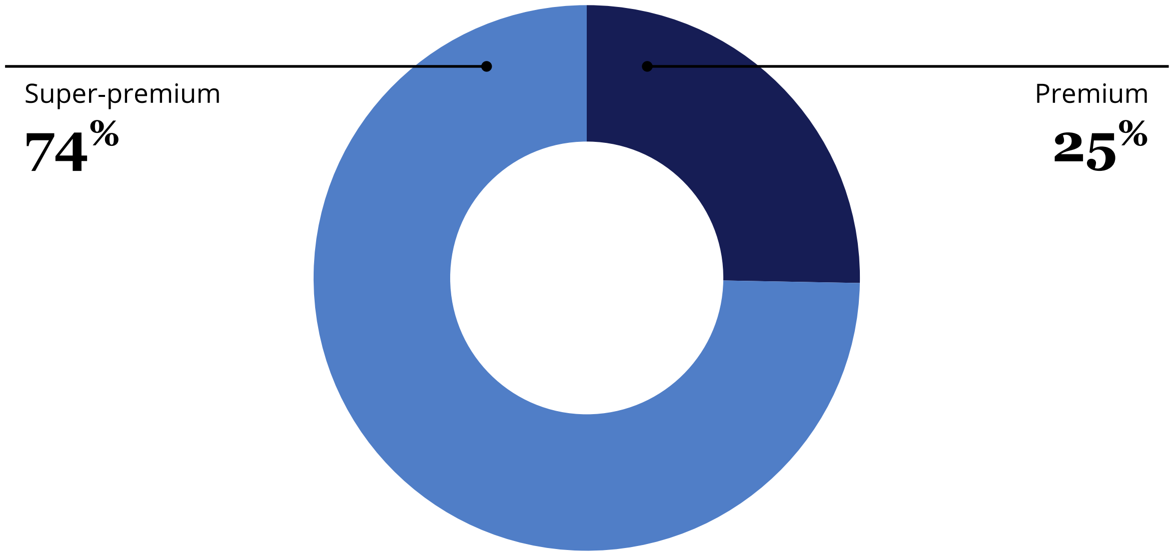
*Sparkling wine includes all sparkling wine types except Champagne, and includes no/low sparkling wine
**Ultra-premium and Prestige omitted from pie chart due to small market share (<1%)
Source: IWSR

Champagne by price band

The amount of Champagne sold above premium price points increased between 2017 and 2022

Champagne by price brand*

Percentage of purchases that fall within the categories below



Champagne volumes by price band

000s 9-litre cases

	2021	2022	CAGR 17-22	CAGR F 22-27
Standard (under AUD 37.50)	11.75	7.55	-0.5%	17.6%
Premium (between AUD 37.50 and 54.99)	202.00	208.80	5.5%	3.2%
Super Premium (between AUD 55.00 and 99.99)	649.15	616.65	5.7%	1.1%
Ultra Premium (AUD 100.00 and over)	6.75	7.30	3.7%	3.1%

Market context

"Mirroring the trend in still wine, sparkling wine shoppers are trading up and drinking less but better. Champagne has benefitted from this dynamic, seeing volumes grow steadily over the past decade."

Executive Summary Report 2023, Australia

*Standard and Ultra-premium omitted from pie chart due to small market share (<1%)
Source: IWSR

Sparkling wine consumption per capita

Per capita consumption of sparkling wine in Australia increased between 2017 and 2022, though it has declined in the past year

Per capita consumption of sparkling wine

Litres per annum (LDA+ population)

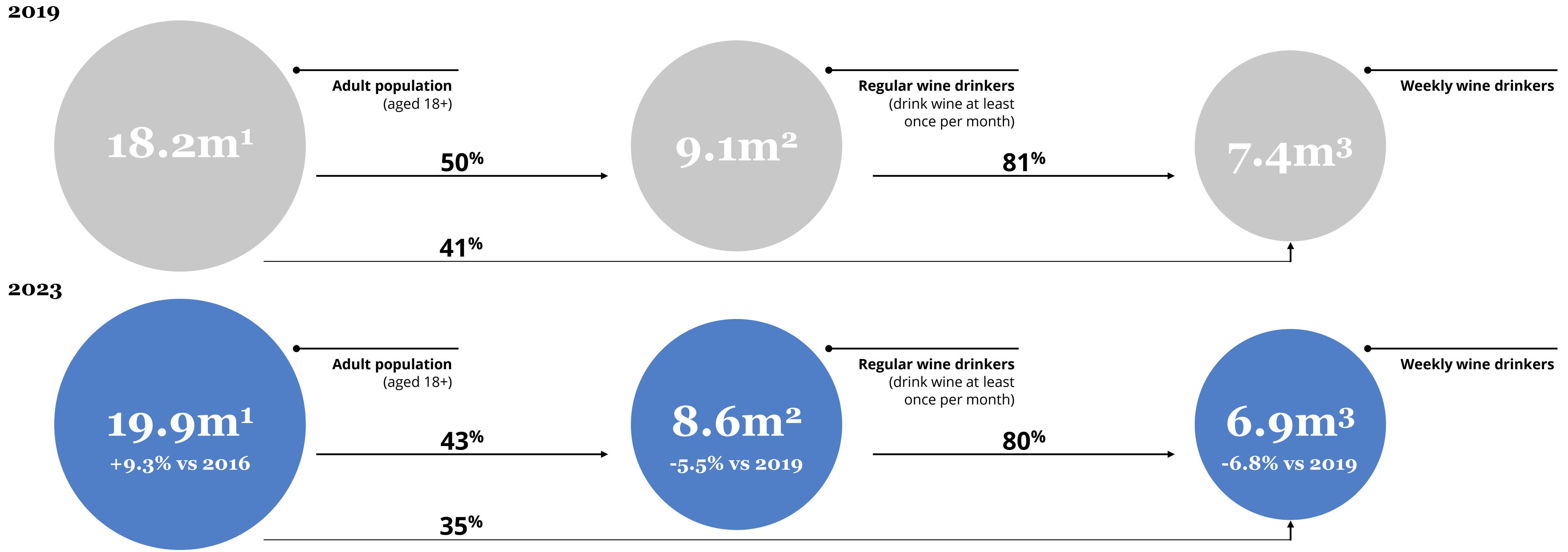
		2021	2022	CAGR 17-22	CAGR 21-22
1	St. Barths	12.47	13.58	8.4%	9.2%
2	St. Martin and St. Maarten	6.29	8.34	2.5%	33.5%
3	Italy	7.87	7.38	-1.2%	-6.2%
4	Turks and Caicos	5.27	6.50	-0.2%	26.0%
5	Germany	5.31	5.51	-1.2%	3.5%
6	Lithuania	4.88	5.06	6.1%	2.5%
7	Latvia	4.47	4.89	1.4%	8.2%
8	France	4.73	4.86	-0.8%	3.1%
9	Guadeloupe	4.17	4.81	-1.3%	16.0%
10	Martinique	4.22	4.43	-4.2%	5.3%
11	Estonia	4.08	4.34	3.3%	5.6%
12	Belgium and Luxembourg	4.28	4.27	-0.8%	0.5%
13	Austria	3.44	3.54	0.6%	3.2%
14	Switzerland	3.23	3.33	1.5%	3.6%
15	Cayman Islands	3.13	3.31	4.2%	7.9%
22=	Australia	3.21	2.90	2.5%	-8.7%

Source: IWSR

Market Demographics

Australian regular wine drinkers

The wine drinking population in Australia has declined since 2019, as the proportion of adults drinking the beverage once a month has declined



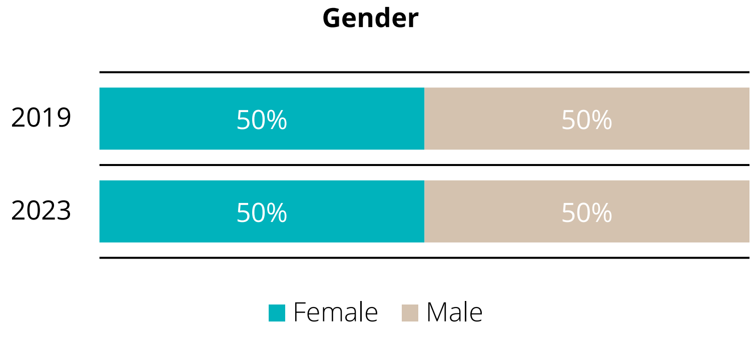
1 2016, 2021 Census data- Australian Bureau of Statistics
2 Wine Intelligence online calibration study, September 2019, rolling average of May 2022 and May 2023 (n≥1,000) Australian adults. Wine=still light wine (red, white, rosé)
3 Wine Intelligence, Vinitrac® Australia, July 2020 and July 2023 (n≥1,000), Australian regular wine drinkers

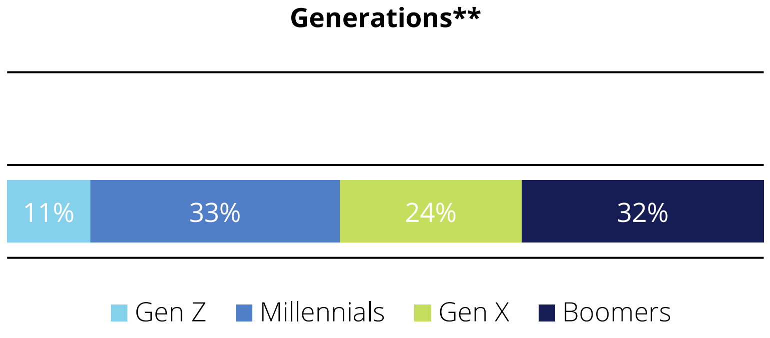
Demographics

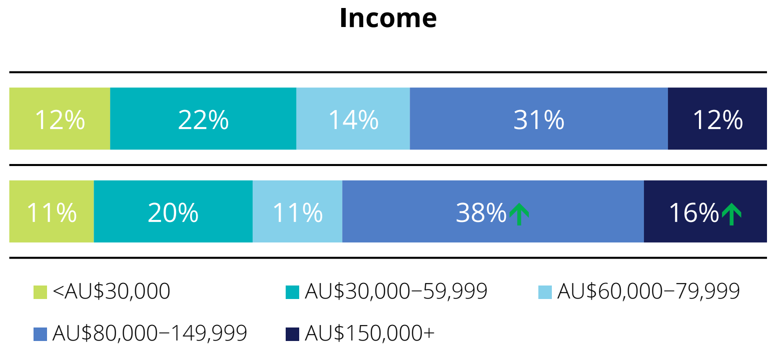
The demographic make-up of Australian regular wine drinkers has remained broadly unchanged since 2019, although there are significantly more high-income drinkers involved with the category now

Q Australian regular wine drinkers*, who are they?

All regular wine drinkers in Australia in 2023 compared with 2019







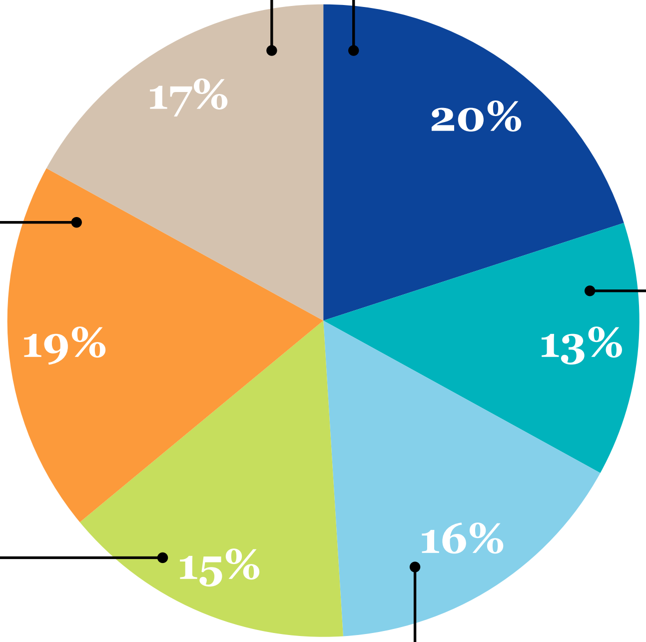
Regions***

	2019	2023	Tracking
New South Wales	33%	34%	→
Victoria	29%	28%	→
Queensland	18%	19%	→
Western Australia	9%	9%	→
South Australia	7%	6%	→

Base: All Australian regular wine drinkers (n≥1,000); –
↑/↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: IWSR, Vinitrac® Australia, Jul '19, Jul '23 (n≥1,000), Australian regular wine drinkers
*Definition of regular wine drinkers: respondents who drink wine once a month; **Tracking not available for generations due to change to question; ***Regions below 5% are excluded from charting

Australia Portraits: Wine drinker segmentation

Engaged Explorers and Senior Bargain Hunters make up the largest proportions of Australian regular wine drinkers in 2023



Kitchen Casuals
The second oldest Portrait category, with a large proportion living in towns or rural locations. The vast majority of Kitchen Casuals only buy wine in the off-premise and typically in leading channels. They are also the most price conscious of all our Portrait groups and always try to get the best quality wine for their budget.

Senior Bargain Hunters
Made up of wine drinkers aged 55 or over who live in towns; Senior Bargain Hunters are the oldest Portrait segment. They drink wine for pleasure and use the beverage to unwind. Most consumption happens at relaxed occasions in the off-premises and they have the lowest averages spend of all Portrait groups in both the off and on-premises. Wine is typically purchased from mainstream channels, with the smallest proportion of online buyers. They prefer white wine and tend to stick mostly to popular varietals.

Contented Treaters
Middle-aged drinkers who live in the suburbs and have high incomes. Contented Treaters value wine for its extrinsic properties, such as the ability to create a warm or friendly atmosphere and to celebrate special occasions. They have less frequent consumption but have the second highest average spend in the off-premise and on-premise. Local bottle shops are an important purchasing channel, with Dan Murphy's an important retailer.

Engaged Explorers
Mostly male and younger wine drinkers, they also are high earners and tend to live in cities, especially Sydney. Wine is important to their lifestyle. They have a strong interest in the category and always try to look for the best quality wine for their budget. They purchase alcohol in higher-end outlets such as specialist wine stores and have the largest proportion of online buyers. Engaged Explorers have a broad alcohol repertoire which includes Champagne, sparkling wine, spirits and RTDs, and they consume a wide range of varietals.

Social Newbies
The youngest Portrait segment, who are likely to live in the city and have high incomes. They see wine as important to their lifestyles and perceive it as a fashionable beverage that makes people sophisticated. They tend to consume wine most on formal and celebratory occasions in both the off-premise and on-premise. Their alcohol repertoire is the most closely aligned with all Australian regular wine drinkers, though a significantly smaller proportion consume red wine, while a significantly higher proportion drink Prosecco.

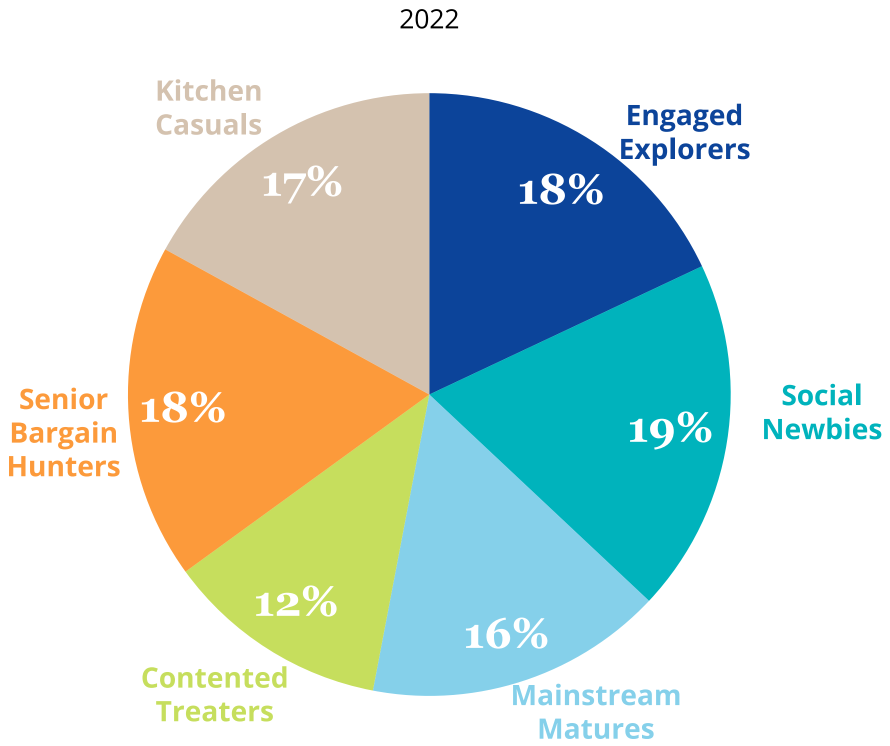
Mainstream Matures
Made up of older wine drinkers who live in towns, they are confident around the wine category and have the highest knowledge base of all the Portrait segments. Pleasure is the main reason they drink wine and its ability to complement food is also important to them. Wine is built into their lifestyles with relaxed drinking occasions and informal meals at home the main drinking occasions. Large national discount wine and drinks stores are an important shopping channel for them. Mainstream Matures tend to consume mainstream alcohol beverages, including red and white wine, beer, whisky and sparkling wine from Australia.

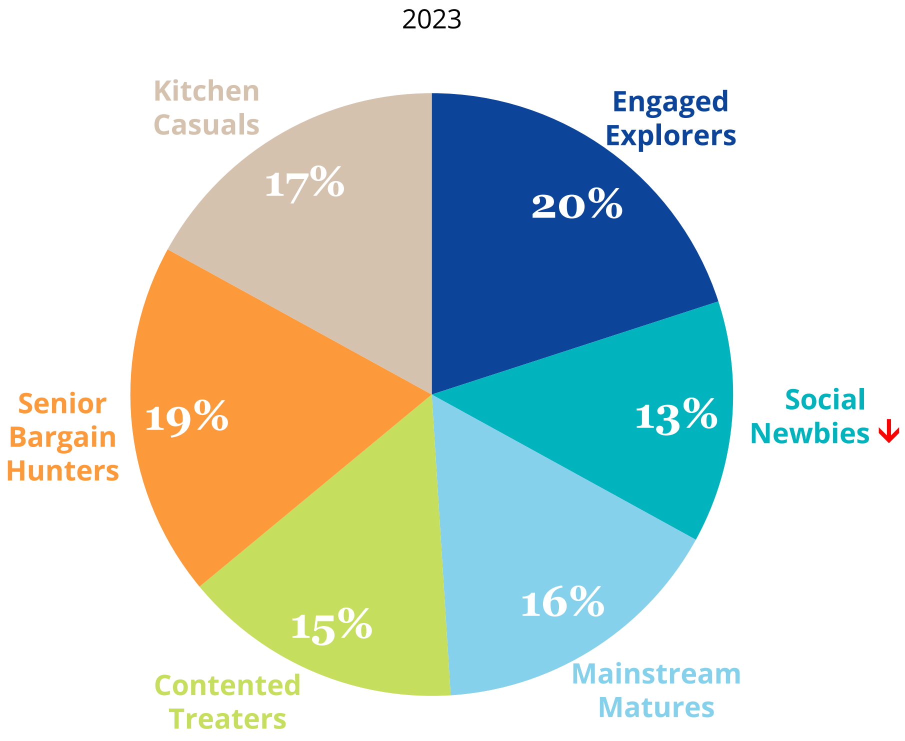
Base: All Australian regular wine drinkers (n=1,008)
Source: IWSR, Vinitrac® Australia, Jul 2023 (n=1,008), Australian regular wine drinkers

Australia Portraits: Wine drinker segmentation

A significantly smaller proportion of regular wine drinkers are classified as Social Newbies than in 2022. The distribution of Portrait segments in the market is relatively even

Percentage share of population of Australia regular wine drinkers by Portraits segments 2022 vs 2023

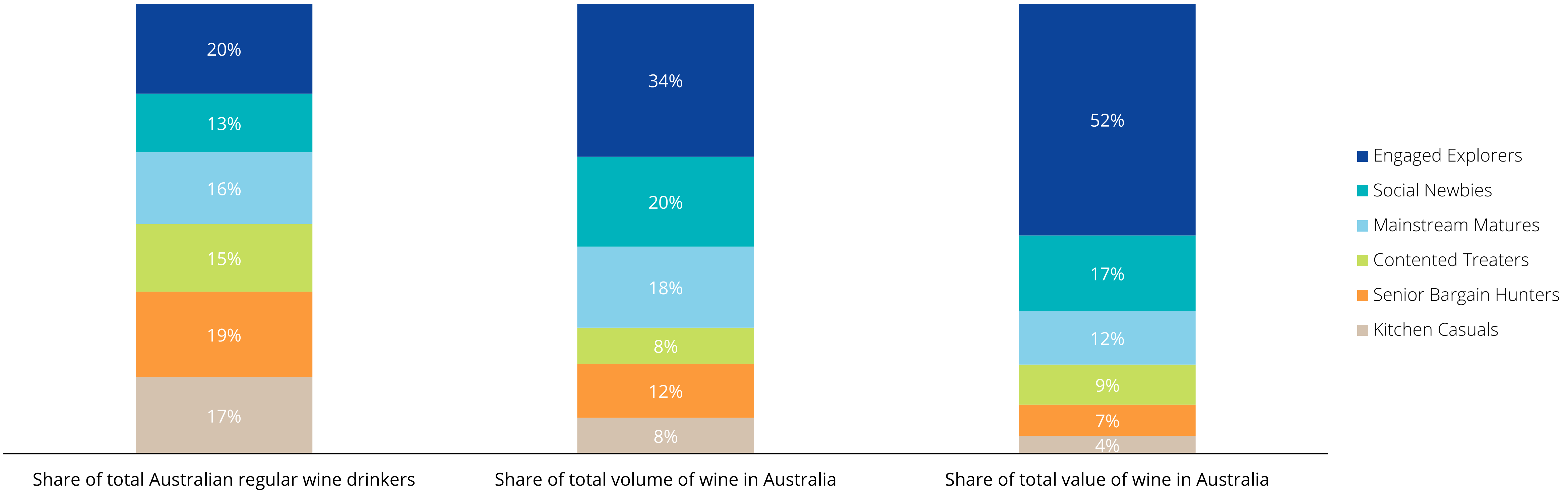




Base: All Australian regular wine drinkers (n=1,008)
↑/↓: Statistically significantly higher/lower than the previous wave(s) at a 95% confidence level
Source: IWSR, Vinitrac® Australia, July 2022 and July 2023 (n=1,008), Australian regular wine drinkers

Australia Portraits market sizing

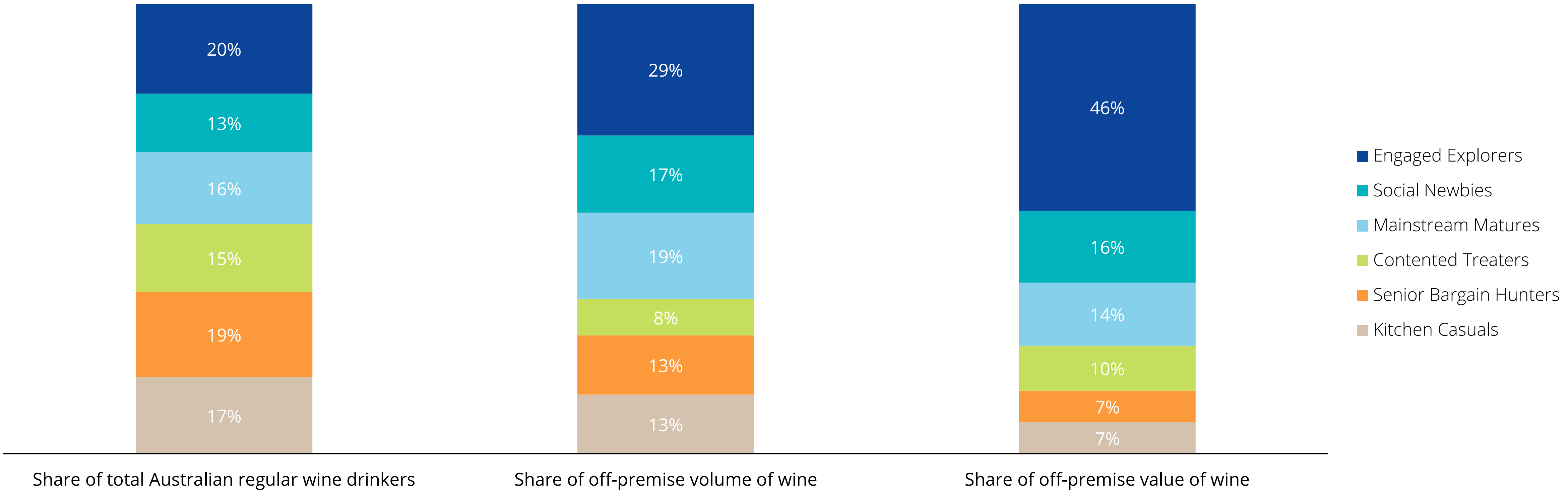
Engaged Explorers are the most important Portraits segment in the market owning to their disproportionally large share of the total volume and value sales in the Australian market



Base: All Australian regular wine drinkers (n=1,008)
Source: IWSR, Vinitrac® Australia, July 2023 (n=1,008), Australian regular wine drinkers

Australia Portraits market sizing: Off-premise

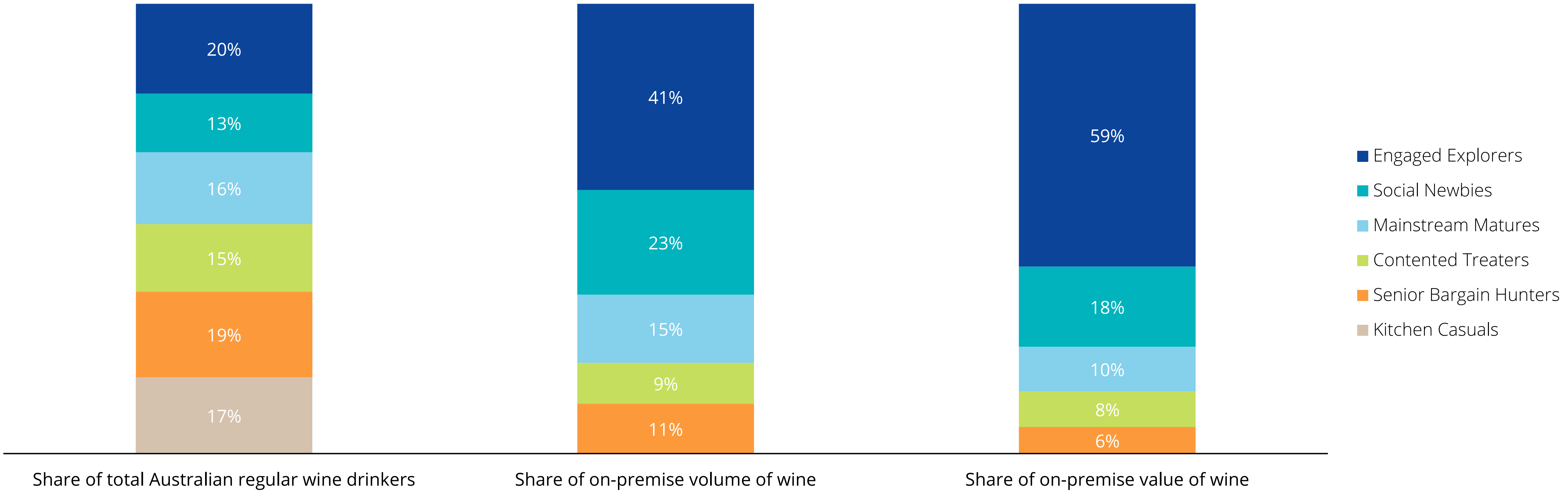
Engaged Explorers is the dominant Portrait segment in the Australian off-premise, accounting for almost half of total value



Base: All Australian regular wine drinkers (n=1,008)
Source: IWSR, Vinitrac® Australia, July 2023 (n=1,008), Australian regular wine drinkers

Australia Portraits market sizing: On-premise

Almost 60% of Australian on-premise wine value is accounted for by Engaged Explorers, who also buy 41% of wine volume



Base: All Australian regular wine drinkers (n=1,008)
Source: IWSR, Vinitrac® Australia, Jul '23 (n=1,008), Australian regular wine drinkers

Drinking Repertoire

Drinking repertoire

Regular wine drinkers are consuming a narrower range of beverages than in 2019, in line with those in other world markets

Alcoholic beverage repertoire: Top 15, tracking

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

Ranking '23		2019 (n=1,000)	2022 (n=1,008)	2023 (n=1,008)	Tracking vs. '19	Tracking vs. '22
1=	Red wine	80%	76%	75%	↓	→
1=	White wine	80%	78%	75%	↓	→
3	Beer	67%	59%	57%	↓	→
4	Whisky / Whiskey	45%	37%	36%	↓	→
5=	Sparkling wine from Australia	46%	37%	35%	↓	→
5=	Vodka	37%	36%	35%	→	→
7	Rosé wine	36%	36%	33%	→	→
8	Gin	31%	29%	30%	→	→
9=	Craft beer	36%	29%	28%	↓	→
9=	Champagne (French Champagne)	32%	28%	28%	↓	→
11	Cocktails	31%	26%	27%	↓	→
12=	Pre-mixed / ready to drink alcoholic beverages	27%	26%	26%	→	→
12=	Prosecco	24%	25%	26%	→	→
12=	Cider	38%	28%	26%	↓	→
15	Rum	29%	23%	23%	↓	→

Base: All Australian 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® Australia, July 2019, July 2022 and July 2023 (n≥1,000), Australian regular wine drinkers

Varietal consumption (1/2)

The array of white varietals being drunk by respondents has narrowed, with five of the top six having lower consumption than in 2019; this could be the result of lower volumes of wine being bought in Australia

White varietal consumption: Tracking

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

Ranking '23		2019 (n=1,000)	2022 (n=1,008)	2023 (n=1,008)	Tracking vs. '19	Tracking vs. '22
1	Sauvignon Blanc	57%	46%	48%	↓	→
2	Chardonnay	49%	39%	38%	↓	→
3	Pinot Grigio / Pinot Gris	34%	28%	33%	→	→
4	Moscato	34%	29%	26%	↓	→
5	Riesling	32%	27%	25%	↓	→
6	Sémillon / Sauvignon blend	30%	25%	23%	↓	→
7	Sémillon	18%	17%	16%	→	→
8	Verdelho	11%	11%	11%	→	→
9	Chenin Blanc	10%	11%	10%	→	→
10=	Colombard	6%	7%	6%	→	→
10=	Albariño	4%	7%	6%	↑	→
10=	Gewürztraminer	5%	7%	6%	→	→
10=	Vermentino	6%	8%	6%	→	→
10=	Grüner Veltliner	4%	6%	6%	↑	→
10=	Torrontés	5%	9%	6%	→	→
10=	Viognier	7%	9%	6%	→	→

Base: All Australian 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® Australia, July 2019, July 2022 and July 2023 (n≥1,000), Australian regular wine drinkers

Varietal consumption (2/2)

A significantly smaller proportion of Australian regular wine drinkers are purchasing the leading red varietals, aligned with lower volumes of wine being purchased in the Australian market as a whole

Red varietal consumption: Tracking

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

Ranking '23		2019 (n=1,000)	2022 (n=1,008)	2023 (n=1,008)	Tracking vs. '19	Tracking vs. '22
1	Shiraz / Syrah	49%	40%	42%	↓	→
2	Cabernet Sauvignon	50%	40%	40%	↓	→
3	Merlot	48%	40%	37%	↓	→
4	Pinot Noir	39%	33%	35%	→	→
5	Cabernet Sauvignon / Merlot blend	39%	32%	30%	↓	→
6	Red blend	20%	19%	21%	→	→
7=	Grenache	10%	12%	12%	→	→
7=	Malbec	11%	14%	12%	→	→
9	Tempranillo	11%	14%	11%	→	→
10	Sangiovese	10%	12%	10%	→	→
11	Durif	5%	11%	8%	↑	→
12=	Zinfandel	5%	8%	7%	↑	→
12=	Gamay	4%	8%	7%	↑	→
14	Carménère	5%	9%	5%	→	→

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

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

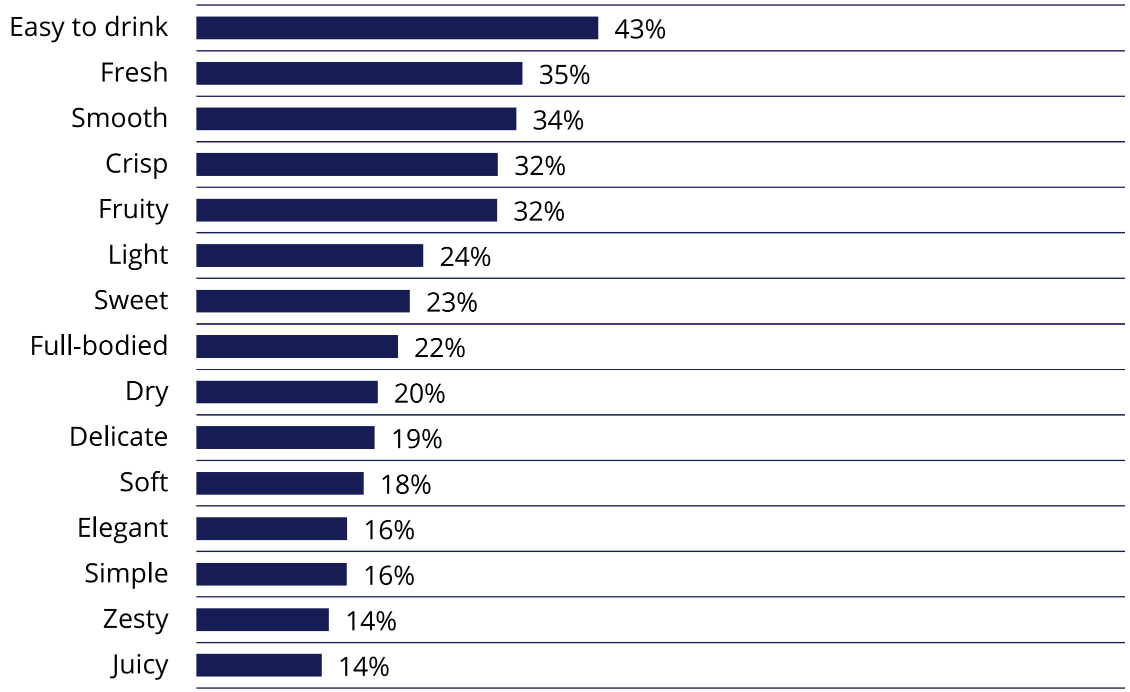
Source: IWSR, Vinitrac® Australia, July 2019, July 2022 and July 2023 (n≥1,000), Australian regular wine drinkers

Ideal wine attributes

Australian wine drinkers value a wine that is easy to drink, with the description appearing in the top three ideal wine attributes for both white and red wine

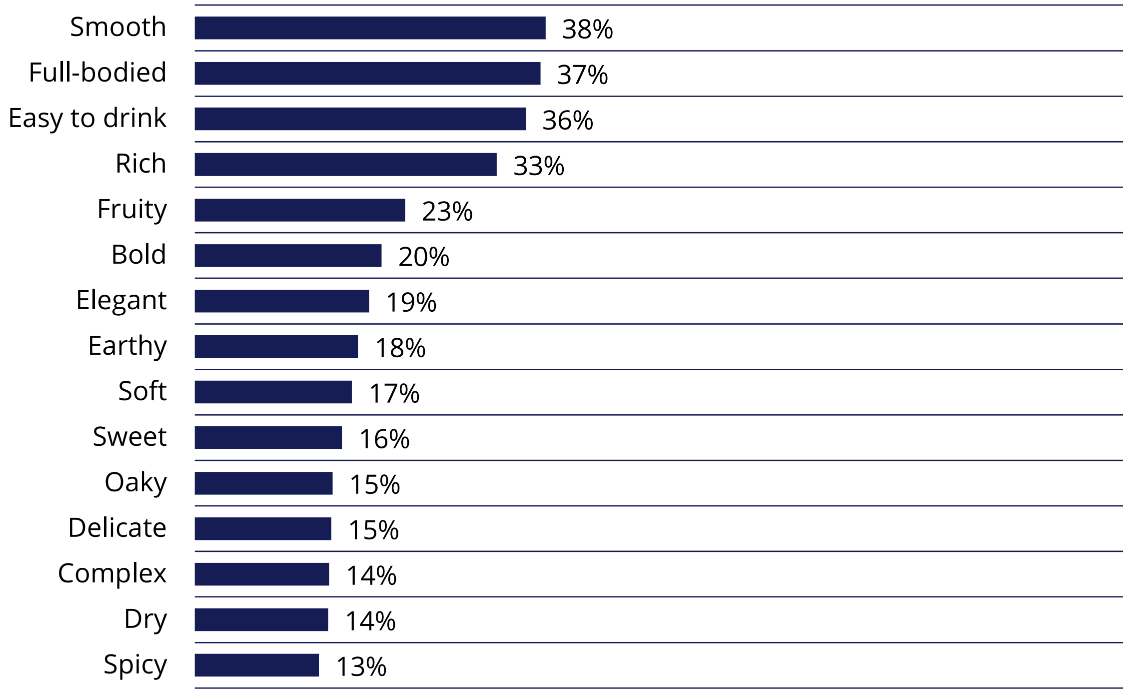
Ideal white wine attributes: Top 15

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



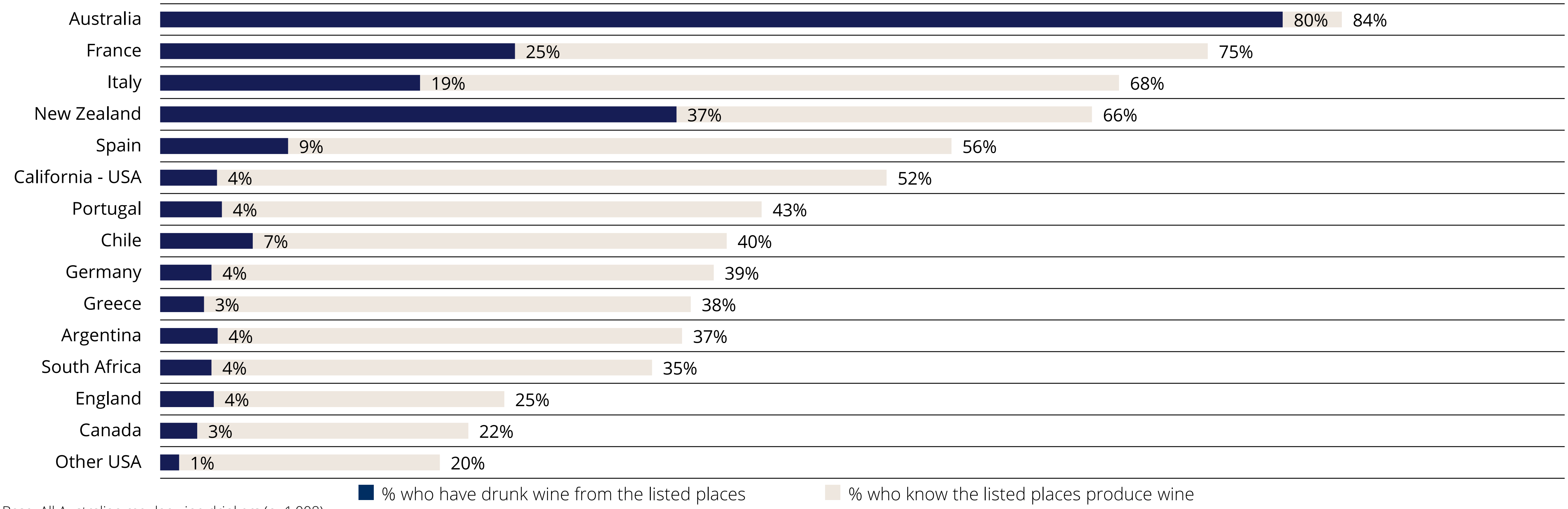
Base: All Australian regular wine drinkers (n=1,008)
Source: IWSR, Vinitrac® Australia, July 2023 (n=1,008), Australian regular wine drinkers

Country of origin awareness and consumption

Australia is the clear leader for both awareness and purchase. Its neighbour New Zealand has the second highest purchase rate despite France and Italy having higher awareness

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 Australian regular wine drinkers (n=1,008)
Source: IWSR, Vinitrac® Australia, July 2023 (n=1,008), Australian regular wine drinkers

Country of origin awareness

Awareness incidences for leading countries of origin have declined among regular wine drinkers, but there is evidence of a recovery for France

Country of origin awareness: Tracking

Percentage of those who know the following places produce wine

Ranking '23		2019 (n=1,000)	2022 (n=1,008)	2023 (n=1,008)	Tracking vs. '19	Tracking vs. '22
1	Australia	90%	81%	84%	↓	→
2	France	81%	68%	75%	↓	↑
3	Italy	72%	67%	68%	↓	→
4	New Zealand	69%	66%	66%	→	→
5	Spain	61%	53%	56%	↓	→
6	California - USA	57%	52%	52%	↓	→
7	Portugal	45%	40%	43%	→	→
8	Chile	41%	39%	40%	→	→
9	Germany	43%	42%	39%	→	→
10	Greece	35%	36%	38%	→	→
11	Argentina	40%	36%	37%	→	→
12	South Africa	36%	33%	35%	→	→
13	England	23%	25%	25%	→	→
14	Canada	21%	23%	22%	→	→
15	Other USA (outside of California)	23%	20%	20%	→	→
16	China	14%	17%	16%	→	→

Base: All Australian 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® Australia, July 2019, July 2022 and July 2023 (n≥1,000), Australian regular wine drinkers

Country of origin consumption

France and New Zealand have started to demonstrate signs of recovery in consumption, but domestically produced wine has yet to reach its pre-pandemic levels

Country of origin consumption: Tracking

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

Ranking '23		2019 (n=1,000)	2022 (n=1,008)	2023 (n=1,008)	Tracking vs. '19	Tracking vs. '22
1	Australia	86%	78%	80%	↓	→
2	New Zealand	40%	34%	37%	→	→
3	France	29%	21%	25%	→	↑
4	Italy	22%	17%	19%	→	→
5	Spain	11%	9%	9%	→	→
6	Chile	7%	7%	7%	→	→
7=	Portugal	5%	5%	4%	→	→
7=	Argentina	5%	5%	4%	→	→
7=	California - USA	6%	6%	4%	↓	↓
7=	England	2%	5%	4%	↑	→
7=	Germany	5%	5%	4%	→	→
7=	South Africa	4%	4%	4%	→	→
13=	Greece	3%	4%	3%	→	→
13=	Canada	2%	4%	3%	→	→
15=	Other USA (outside of California)	2%	3%	1%	→	↓
15=	China	1%	3%	1%	→	↓

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

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

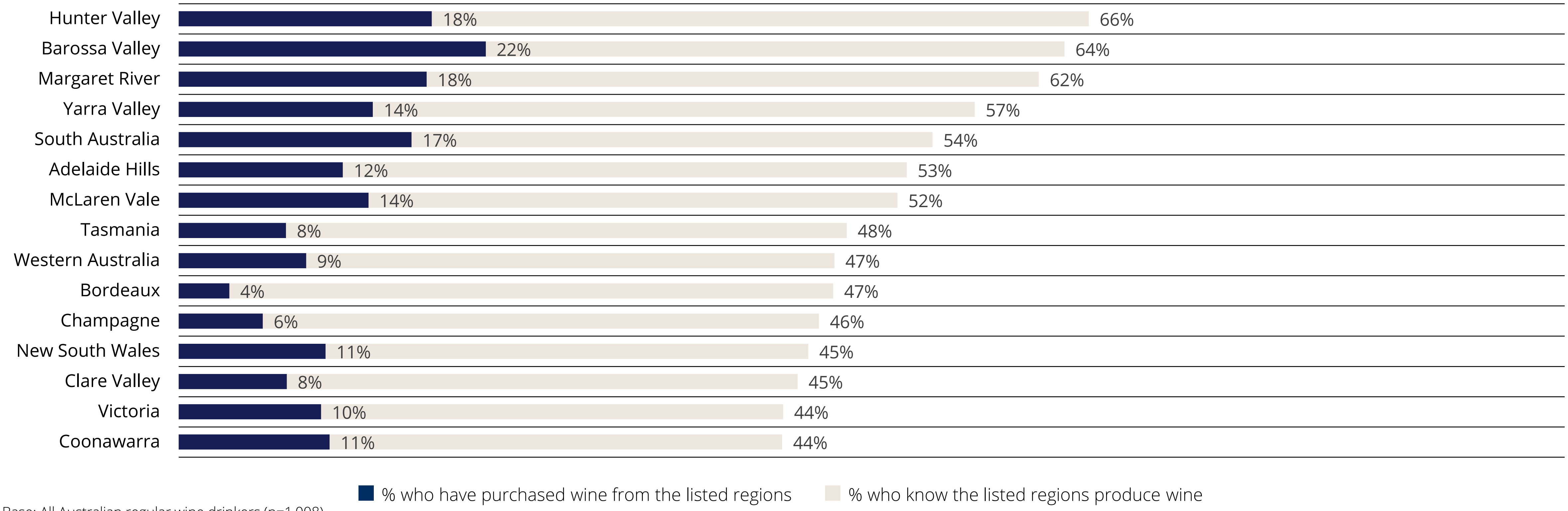
Source: IWSR, Vinitrac® Australia, July 2019, July 2022 and July 2023 (n≥1,000), Australian regular wine drinkers

Region of origin awareness and purchase

Awareness and purchase are both dominated by Australian regions, with availability likely to be a big influence

Region of origin: Top 15 awareness and purchase levels

Percentage of those who know of or have purchased wine from the following regions in the past three months



Base: All Australian regular wine drinkers (n=1,008)
Source: IWSR, Vinitrac® Australia, July 2023 (n=1,008), Australian regular wine drinkers

Region of origin awareness

Australian regular wine drinkers are now aware of fewer wine producing regions than in 2019

Region of origin awareness: Tracking

Percentage of those who know the following region produce wine

Ranking '23		2019 (n=1,000)	2022 (n=1,008)	2023 (n=1,008)	Tracking vs. '19	Tracking vs. '22
1	Hunter Valley	72%	60%	66%	↓	↑
2	Barossa Valley	73%	63%	64%	↓	→
3	Margaret River	71%	58%	62%	↓	→
4	Yarra Valley	68%	57%	57%	↓	→
5	South Australia	62%	53%	54%	↓	→
6	Adelaide Hills	57%	51%	53%	↓	→
7	McLaren Vale	55%	49%	52%	→	→
8	Tasmania	52%	43%	48%	→	↑
9=	Western Australia	54%	46%	47%	↓	→
9=	Bordeaux	57%	46%	47%	↓	→
11	Champagne	55%	43%	46%	↓	→
12=	New South Wales	48%	41%	45%	→	↑
12=	Clare Valley	48%	42%	45%	→	→
14=	Victoria	51%	41%	44%	↓	→
14=	Coonawarra	53%	43%	44%	↓	→

Base: All Australian 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® Australia, July 2019, July 2022 and July 2023 (n≥1,000), Australian regular wine drinkers

Region of origin purchase

With the exception of Marlborough in New Zealand, the top 15 regions for consumption among regular wine drinkers are all Australian, highlighting the strong position that domestically produced wine holds

Region of origin purchase: Tracking

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

Ranking '23		2019 (n=1,000)	2022 (n=1,008)	2023 (n=1,008)	Tracking vs. '19	Tracking vs. '22
1	Barossa Valley	27%	26%	22%	↓	↓
2=	Hunter Valley	22%	16%	18%	↓	→
2=	Margaret River	24%	20%	18%	↓	→
4	South Australia	17%	17%	17%	→	→
5=	Yarra Valley	14%	14%	14%	→	→
5=	McLaren Vale	15%	15%	14%	→	→
7	Marlborough	16%	11%	13%	→	→
8	Adelaide Hills	11%	12%	12%	→	→
9=	Coonawarra	12%	10%	11%	→	→
9=	New South Wales	11%	10%	11%	→	→
11	Victoria	11%	9%	10%	→	→
12	Western Australia	11%	10%	9%	→	→
13=	South East Australia	8%	7%	8%	→	→
13=	Clare Valley	8%	8%	8%	→	→
13=	Tasmania	8%	8%	8%	→	→

Base: All Australian 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® Australia, July 2019, July 2022 and July 2023 (n≥1,000), Australian regular wine drinkers

Wine-Buying Behaviours

Wine-buying channel usage

Regular wine drinkers are buying from a narrower range of channels than in previous years, aligning with lower volumes being bought overall, with fewer purchase occasions; online retail has declined since 2022

Wine-buying channel usage: Tracking

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

Ranking '23		2019 (n=1,000)	2022 (n=1,008)	2023 (n=1,008)	Tracking vs. '19	Tracking vs. '22
1	Local bottle shop	59%	49%	48%	↓	→
2	In the supermarket-attached liquor store	58%	46%	45%	↓	→
3	Large national discount wine & drinks store	38%	32%	31%	↓	→
4=	From a specialist wine shop	16%	18%	15%	→	→
4=	From an online retailer	16%	18%	15%	→	↓
6	From a winery during a visit	15%	16%	13%	→	→
7=	From a wine club or membership organisation	10%	13%	12%	→	→
7=	From a supermarket website	n/a	16%	12%	n/a	↓
9	From a drive through	16%	15%	11%	↓	↓
10	From a winery's website	9%	12%	10%	→	→
11	From a delivery app	n/a	11%	8%	n/a	↓
12	From Duty Free	11%	8%	7%	↓	→

Base: All Australian 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® Australia, July 2019, July 2022 and July 2023 (n≥1,000), Australian regular wine drinkers

Wine-buying retailer usage

Four of the top six retailers where Australian regular wine drinkers buy wine are being used less now than they were in 2019

Wine-buying retailer usage Top 15: Tracking

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

Ranking '23		2019	2022	2023	Tracking vs. '19	Tracking vs. '22
1	Dan Murphy's	54%	45%	48%	↓	→
2	BWS	47%	40%	43%	→	→
3	Liquorland / Liquorland Express	35%	25%	27%	↓	→
4	Aldi	18%	11%	13%	↓	→
5	First Choice Liquor	10%	11%	12%	→	→
6	Cellarbrations	9%	7%	6%	↓	→
7=	IGA Liquor	6%	6%	5%	→	→
7=	Woolworths online	4%	6%	5%	→	→
7=	Vintage Cellars	4%	6%	5%	→	→
7=	Naked Wines	n/a	5%	5%	n/a	→
11=	Costco	3%	5%	4%	→	→
11=	The Bottle O	4%	4%	4%	→	→
11=	Local Liquor	2%	3%	4%	↑	→
11=	Cellarmasters	5%	4%	4%	→	→
15=	Thirsty Camel	5%	5%	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® Australia, July 2019, July 2022 and July 2023 (n≥1,000), Australian regular wine drinkers

Consumption frequency

Boomers are significantly more likely than regular wine drinkers to be daily wine drinkers

Wine consumption frequency: Tracking

Percentage who usually drink wine at the following frequency

	2019 (n=1,000)	2022 (n=1,008)	2023 (n=1,008)	Tracking vs. '19	Tracking vs. '22
Most days / every day	13%	17%	13%	→	↓
2-5 times a week	33%	38%	40%	↑	→
About once a week	28%	27%	27%	→	→
1-3 times a month	27%	18%	20%	↓	→

Wine consumption frequency: by generation

Percentage who usually drink wine at the following frequency

	All Australian Regular Wine Drinkers (n=1,008)	LDA-26 Gen Z (n=115)	27-42 Millennials (n=328)	43-58 Gen X (n=246)	59+ Boomers (n=319)
Most days / every day	13%	10%	7%	12%	21%
2-5 times a week	40%	31%	50%	35%	39%
About once a week	27%	34%	28%	31%	20%
1-3 times a month	20%	25%	16%	22%	20%

Base: All Australian 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® Australia, July 2019, July 2022 and July 2023 (n≥1,000), Australian regular wine drinkers

Off-premise consumption frequency

Consumption has become more frequent across all occasions since 2019, likely led by Boomers, who are more likely to drink wine regularly

Off-premise: Wine consumption frequency by occasion

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

	2019	2022	2023	Tracking vs. '19	Tracking vs. '22
A relaxing drink at the end of the day at home	7.11	7.61	8.18	↑	→
With an informal meal at home	5.92	6.59	6.94	↑	→
With a more formal dinner party at home	1.54	2.21	1.95	↑	→
At a party / celebration at home	1.62	1.92	1.97	↑	→

Base: Those who buy wine in the off-premise

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

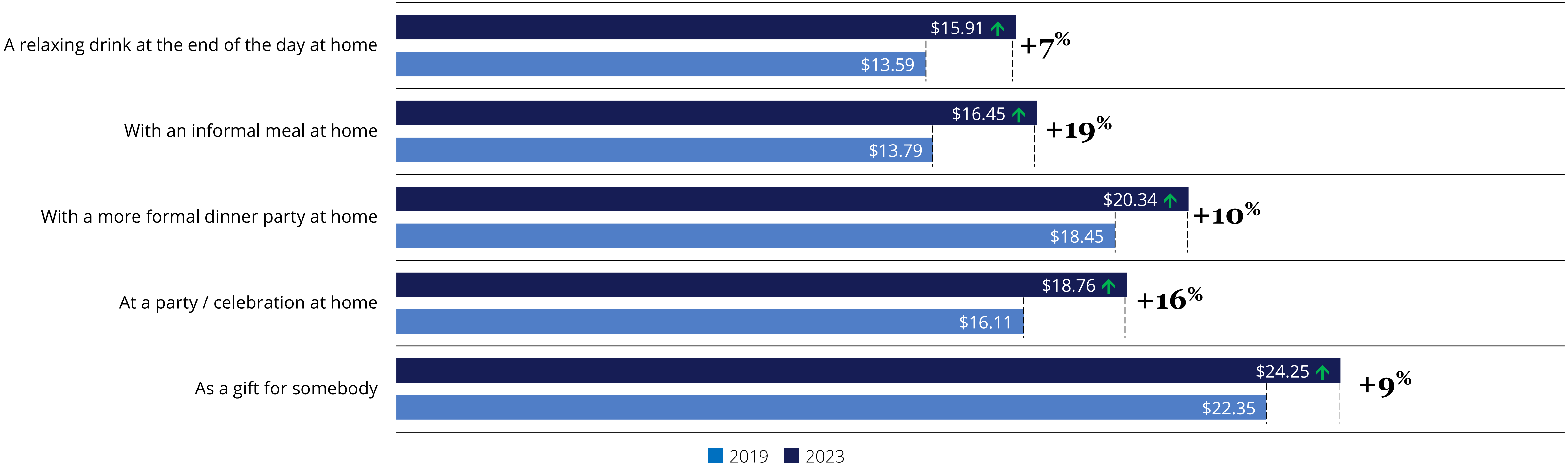
Source: IWSR, Vinitrac® Australia, July 2019, July 2022 and July 2023 (n≥1,000), Australian regular wine drinkers

Off-premise spend

The amount typically spent on a bottle has increased significantly across all occasions and is outpacing the rate of inflation in the market

Off-premise: Typical spend per bottle by occasion

Those who buy wine in the off-premise



Base: Those who buy wine in the off-premise

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

Source: IWSR, Vinitrac® Australia, July 2019 and July 2023 (n≥1,000), Australian regular wine drinkers

On-premise purchase

Purchase rates are consistent with 2019 and 2022, despite the impact of the global pandemic; Gen Z and Millennial regular wine drinkers are keen on-premise drinkers

Wine purchase in on-premise

Percentage who buy wine in a bar, pub or restaurant

On-premise location		2019 (n=1,000)	2022 (n=1,008)	2023 (n=1,008)	Tracking vs. '19	Tracking vs. '22
Bar or pub	Yes	64%	63%	64%	→	→
	No	36%	37%	36%	→	→
Restaurant	Yes	83%	79%	81%	→	→
	No	17%	21%	19%	→	→
On-premise drinkers	Yes	87%	85%	84%	→	→
	Yes	87%	85%	84%	→	→

Wine purchase in on-premise: by generation

Percentage who buy wine in a bar, pub or restaurant

On-premise location		All Australian Regular Wine Drinkers (n=1,008)	LDA-26 Gen Z (n=115)	27-42 Millennials (n=328)	43-58 Gen X (n=246)	59+ Boomers (n=319)
Bar or pub	Yes	64%	71%	74%	55%	57%
	No	36%	29%	26%	45%	43%
Restaurant	Yes	81%	87%	89%	76%	76%
	No	19%	13%	11%	24%	24%
On-premise drinkers	Yes	84%	93%	91%	79%	79%
	No	16%	7%	9%	21%	21%

Base: All Australian 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® Australia, July 2019, July 2022 and July 2023 (n≥1,000), Australian regular wine drinkers

On-premise consumption frequency

There has been a long-term increase in consumption frequency across all occasions. There has been a decrease in frequency of consumption for formal meals and celebrations in the past year

On-premise: Wine consumption frequency by occasion

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

	2019	2022	2023	Tracking vs. '19	Tracking vs. '22
A relaxing drink out at the end of the day	4.81	5.89	6.41	↑	→
With an informal meal in a pub / bar / restaurant / bistro	1.92	2.81	2.57	↑	→
With a more formal dinner in a restaurant	1.74	2.54	2.15	↑	↓
At a party / celebration / big night out	1.55	2.39	1.93	↑	↓

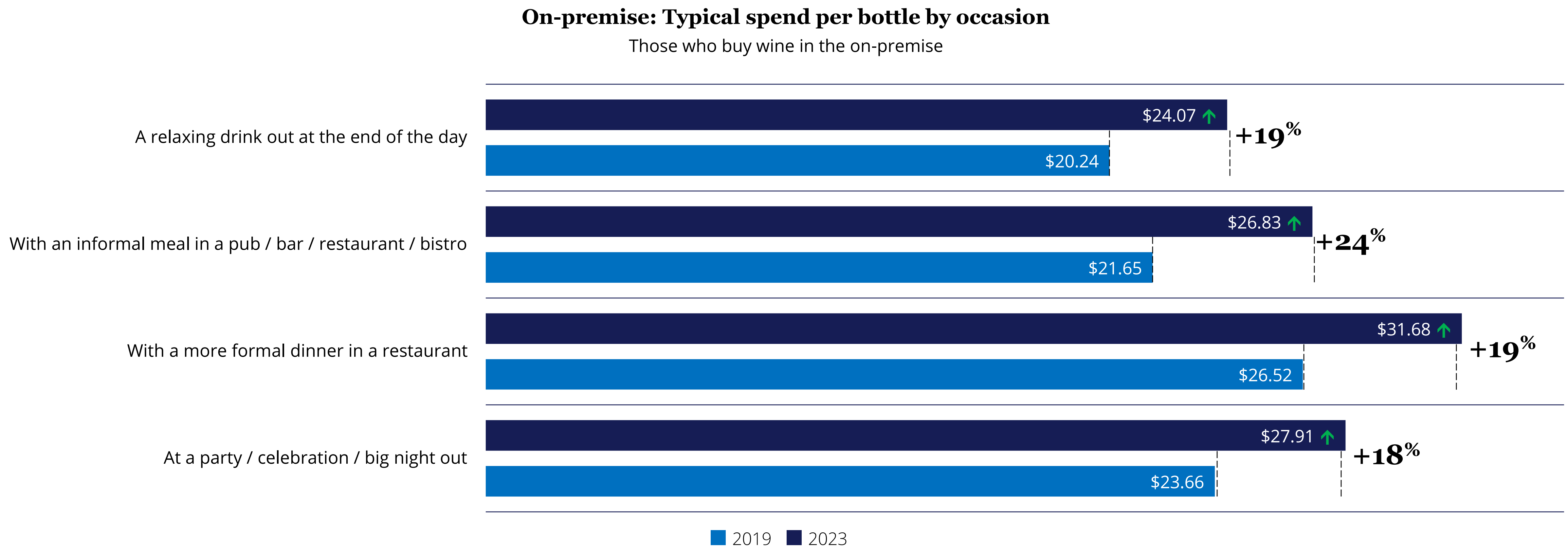
Base: Those who buy wine in the on-premise

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

Source: IWSR, Vinitrac® Australia, July 2019, July 2022 and July 2023 (n≥1,000), Australian regular wine drinkers

On-premise spend

The amount typically spent by Australian regular wine drinkers in the on-premise continues to increase significantly, with formal dinner occasions now exceeding the $30 mark



Base: Those who buy wine in the on-premise

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

Source: IWSR, Vinitrac® Australia, July 2019 and July 2023 (n≥1,000), Australian regular wine drinkers

Wine Views and Attitudes

Attitudes towards wine

Regular wine drinkers who are sticking with the category are more engaged than in 2019, with Gen Z and Millennials the most engaged

Attitudes towards wine: Tracking

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

	2019 (n=1,000)	2022 (n=1,008)	2023 (n=1,008)	Tracking vs. '19	Tracking vs. '22
I enjoy trying new and different styles of wine on a regular basis	40%	47%	48%	↑	→
I don't mind what I buy so long as the price is right	29%	26%	23%	↓	→
I know what I like and I tend to stick to what I know	31%	28%	29%	→	→

Attitudes towards wine by generation

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

	All Australian Regular Wine Drinkers (n=1,008)	LDA-26 Gen Z (n=115)	27-42 Millennials (n=328)	43-58 Gen X (n=246)	59+ Boomers (n=319)
I enjoy trying new and different styles of wine on a regular basis	48%	67%	66%	44%	28%
I don't mind what I buy so long as the price is right	23%	21%	18%	33%	22%
I know what I like and I tend to stick to what I know	29%	12%	16%	24%	51%

Base: All Australian 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® Australia, July 2019, July 2022 and July 2023 (n≥1,000), Australian regular wine drinkers

Wine involvement

Levels of involvement in the wine category have remained stable since an increase during the pandemic; Millennials account for the biggest proportion of highly involved drinkers

Wine involvement: Tracking

	2019 (n=1,000)	2022 (n=1,008)	2023 (n=1,008)	Tracking vs. '19	Tracking vs. '22
High involvement	31%	42%	40%	↑	→
Medium involvement	40%	38%	39%	→	→
Low involvement	29%	19%	21%	↓	→

Wine involvement by generation

	All Australian Regular Wine Drinkers (n=1,008)	LDA-26 Gen Z (n=115)	27-42 Millennials (n=328)	43-58 Gen X (n=246)	59+ Boomers (n=319)
High involvement	40%	45%	49%	38%	30%
Medium involvement	39%	38%	35%	42%	41%
Low involvement	21%	18%	16%	20%	29%

Base: All Australian 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® Australia, July 2019, July 2022 and July 2023 (n≥1,000), Australian regular wine drinkers

Involvement and perceived expertise

More regular wine drinkers agree with a broad range of involvement statements than in 2019, which indicates that there are more engaged drinkers in the category

Involvement and perceived expertise in wine: Tracking

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

Ranking '23		2019 (n=1,000)	2022 (n=1,008)	2023 (n=1,008)	Tracking vs. '19	Tracking vs. '22
1	Drinking wine gives me pleasure	79%	84%	84%	↑	→
2	I always look for the best quality wines I can get for my budget	75%	74%	77%	→	→
3=	Deciding which wine to buy is an important decision	66%	71%	69%	→	→
3=	Generally speaking, wine is reasonably priced	61%	67%	69%	↑	→
5	I like to take my time when I purchase a bottle of wine	59%	62%	60%	→	→
6	Wine is important to me in my lifestyle	44%	61%	57%	↑	→
7	I feel competent about my knowledge of wine	39%	50%	50%	↑	→
8	I have a strong interest in wine	44%	54%	49%	↑	↓
9	Compared to others, I know less about the subject of wine	42%	49%	48%	↑	→
10	Generally speaking, wine is an expensive drink	32%	41%	37%	↑	→
11	I don't understand much about wine	30%	35%	33%	→	→

Base: All Australian regular wine drinkers (n≥1,000)
↑/↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: IWSR, Vinitrac® Australia, July 2019, July 2022 and July 2023 (n≥1,000), Australian regular wine drinkers

Involvement and perceived expertise

More Gen Zs and Millennials feel competent about their wine knowledge than regular wine drinkers, despite both groups having lower levels of knowledge than all regular wine drinkers

Involvement and perceived expertise in wine by generation

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

Ranking '23		All Australian Regular Wine Drinkers (n=1,008)	LDA-26 Gen Z (n=115)	27-42 Millennials (n=328)	43-58 Gen X (n=246)	59+ Boomers (n=319)
1	Drinking wine gives me pleasure	84%	74%	83%	86%	87%
2	I always look for the best quality wines I can get for my budget	77%	79%	80%	77%	73%
3=	Deciding which wine to buy is an important decision	69%	71%	76%	64%	64%
3=	Generally speaking, wine is reasonably priced	69%	65%	69%	70%	68%
5	I like to take my time when I purchase a bottle of wine	60%	70%	68%	55%	53%
6	Wine is important to me in my lifestyle	57%	62%	67%	54%	48%
7	I feel competent about my knowledge of wine	50%	63%	61%	44%	40%
8	I have a strong interest in wine	49%	55%	61%	48%	37%
9	Compared to others, I know less about the subject of wine	48%	54%	56%	46%	38%
10	Generally speaking, wine is an expensive drink	37%	54%	48%	29%	26%
11	I don't understand much about wine	33%	41%	40%	31%	23%

Base: All Australian regular wine drinkers (n=1,008)
%/%: Statistically significantly higher / lower than all regular wine drinkers at a 95% confidence level
Source: IWSR, Vinitrac® Australia, July 2023 (n=1,008), Australian regular wine drinkers

Wine knowledge and confidence indices

Despite regular wine drinkers feeling more confident about their wine knowledge than in 2019, actual knowledge levels have declined

Wine knowledge index: Tracking[1]

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

	2019 (n=1,000)	2022 (n=1,008)	2023 (n=1,008)	Tracking vs. '19	Tracking vs. '22
Knowledge Index	40.1	35.1	35.9	↓	→

Wine confidence index: Tracking[2]

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

	2019 (n=1,000)	2022 (n=1,008)	2023 (n=1,008)	Tracking vs. '19	Tracking vs. '22
Confidence Index	50.9	52.6	53.1	↑	→

[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 Australian regular wine drinkers (n≥1,000); ↑/↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: IWSR, Vinitrac® Australia, July 2019, July 2022 and July 2023 (n≥1,000), Australian regular wine drinkers

Wine knowledge and confidence indices

Younger LDA+ wine drinkers have a lower knowledge base than regular wine drinkers, especially Gen Zs; this is due to a lack of experience in the wine category which is a broader global trend

Wine knowledge index: by generation[1]

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

	All Australian Regular Wine Drinkers (n=1,008)	LDA-26 Gen Z (n=115)	27-42 Millennials (n=328)	43-58 Gen X (n=246)	59+ Boomers (n=319)
Knowledge Index	35.9	17.7	24.0	36.8	54.1

Wine confidence index: by generation

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

	All Australian Regular Wine Drinkers (n=1,008)	LDA-26 Gen Z (n=115)	27-42 Millennials (n=328)	43-58 Gen X (n=246)	59+ Boomers (n=319)
Confidence index	53.1	55.2	54.0	52.0	52.2

[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 Australian regular wine drinkers (n=1,008); %/%: Statistically significantly higher / lower than all regular wine drinkers at a 95% confidence level
Source: IWSR, Vinitrac® Australia, July 2023 (n=1,008), Australian regular wine drinkers

Wine-drinking motivations

Australian regular wine drinkers are mainly motivated to drink wine for its extrinsic properties, with the ability to help respondents relax the leading motivation

Wine drinking motivations: Tracking

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

Ranking '23		2022 (n=1,008)	2023 (n=1,008)	Tracking vs. '22
1	Drinking wine makes me feel relaxed	51%	51%	→
2=	I really love the taste of wine	48%	49%	→
2=	Wine enhances food and meals	47%	49%	→
4	To celebrate special occasions	47%	46%	→
5	Wine is about sharing with a partner / close friend or family member	38%	39%	→
6	I treat myself with wine at the end of the day	36%	37%	→
7=	Wine helps create a warm / friendly atmosphere	35%	36%	→
7=	Wine is about sharing something with others	35%	36%	→
9	Wine is a refreshing drink	30%	27%	→
10	Drinking wine can be good for my health	28%	26%	→
11	Most of my friends drink wine	25%	25%	→
12	I like shopping / choosing wines to drink	22%	22%	→
13	I like learning about new wines	22%	19%	→
14	Wine is a fashionable drink	19%	16%	→
15=	It makes people sophisticated	14%	13%	→
15=	It makes me feel individual and unique	12%	13%	→

Base: All Australian regular wine drinkers (n≥1,000); = Represents equal ranking
%/%: Statistically significantly higher / lower than all regular wine drinkers at a 95% confidence level
Source: IWSR, Vinitrac® Australia, July 2022, July 2023 (n≥1,008), Australian regular wine drinkers

Wine-drinking motivations

Significantly more Gen Zs and Millennials than regular wine drinkers are motivated to drink wine due its ability to make them appear sophisticated or individual

Wine drinking motivations by generation

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

Ranking '23		All Australian Regular Wine Drinkers (n=1,008)	LDA-26 Gen Z (n=115)	27-42 Millennials (n=328)	43-58 Gen X (n=246)	59+ Boomers (n=319)
1	Drinking wine makes me feel relaxed	51%	40%	45%	55%	58%
2=	I really love the taste of wine	49%	35%	46%	49%	58%
2=	Wine enhances food and meals	49%	33%	40%	43%	69%
4	To celebrate special occasions	46%	31%	43%	41%	58%
5	Wine is about sharing with a partner / close friend or family member	39%	34%	36%	31%	49%
6	I treat myself with wine at the end of the day	37%	28%	40%	31%	41%
7=	Wine helps create a warm / friendly atmosphere	36%	33%	33%	32%	45%
7=	Wine is about sharing something with others	36%	27%	32%	32%	46%
9	Wine is a refreshing drink	27%	20%	26%	25%	31%
10	Drinking wine can be good for my health	26%	21%	27%	29%	26%
11	Most of my friends drink wine	25%	20%	26%	16%	33%
12	I like shopping / choosing wines to drink	22%	23%	26%	19%	21%
13	I like learning about new wines	19%	26%	22%	16%	16%
14	Wine is a fashionable drink	16%	17%	24%	12%	11%
15=	It makes people sophisticated	13%	25%	23%	8%	3%
15=	It makes me feel individual and unique	13%	22%	20%	10%	5%

Base: All Australian regular wine drinkers (n=1,008)
%/%: Statistically significantly higher / lower than all regular wine drinkers at a 95% confidence level
Source: IWSR, Vinitrac® Australia, July 2023 (n=1,008), Australian regular wine drinkers

Wine-buying choice cues

More regular wine drinkers have a broad range of choice cues than in 2019, indicating that they are increasingly sophisticated in their approach to the category

Wine choice cues: Tracking

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

Ranking '23		2019 (n=1,000)	2022 (n=1,008)	2023 (n=1,008)	Tracking vs. '19	Tracking vs. '22
1	Grape variety	73%	78%	79%	↑	→
2	A brand I am aware of	65%	71%	69%	↑	→
3	The country of origin	60%	70%	67%	↑	→
4	Taste or wine style descriptions displayed on the shelves or on wine labels	61%	65%	65%	→	→
5	The region of origin	57%	66%	64%	↑	→
6	Wine that matches or complements food	63%	64%	62%	→	→
7	Recommendation by friend or family	59%	58%	60%	→	→
8	Promotional offer	57%	57%	59%	→	→
9	Alcohol content	44%	52%	52%	↑	→
10	Recommendations from shop staff or shop leaflets	39%	46%	46%	↑	→
11	Appeal of the bottle and / or label design	40%	46%	45%	↑	→
12	Recommendation by wine critic or writer	29%	38%	37%	↑	→
13	Whether or not the wine has won a medal or award	30%	37%	35%	↑	→
14	Recommendation by wine guide books	28%	36%	32%	↑	→

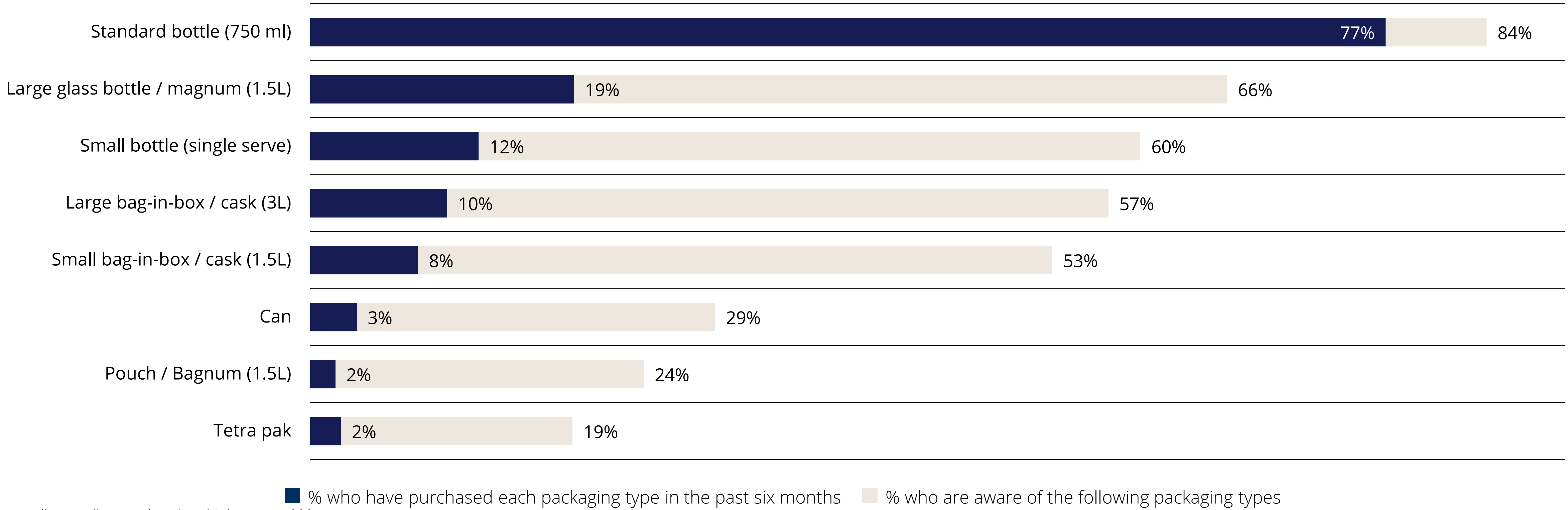
Base: All Australian regular wine drinkers (n≥1,000); = Represents equal ranking
↑/↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: IWSR, Vinitrac® Australia, July 2019, July 2022 and July 2023 (n≥1,000), Australian regular wine drinkers

Packaging type consumption and awareness

Despite economic pressures, standard bottles remain the dominant packaging format; one in five have bought magnums in the past six months

Packaging types: Awareness and consumption levels

Percentage of those who are aware of or have purchased wine in the following packaging types



Base: All Australian regular wine drinkers (n=1,008)
Source: IWSR, Vinitrac® Australia, July 2023 (n=1,008), Australian regular wine drinkers

Packaging purchase

A smaller proportion of regular wine drinkers are buying alternative packaging formats than in 2022; greater numbers of Boomers buy large bag-in-box or casks than regular wine drinkers

Packaging purchase: Tracking

Percentage who have purchased wine in the following packaging types

Ranking '23		2022 (n=1,008)	2023 (n=1,008)	Tracking vs. '22
1	Standard bottle	77%	77%	→
2	Large glass bottle / magnum	19%	19%	→
3	Small bottle	12%	12%	→
4	Large bag-in-box / cask	15%	10%	↓
5	Small bag-in-box / cask	9%	8%	→
6	Can	5%	3%	↓
7=	Tetra pak	4%	2%	↓
7=	Pouch / Bagnum	5%	2%	↓

Packaging purchase: by generation

Percentage who have purchased wine in the following packaging types

Ranking '23		All Australian Regular Wine Drinkers (n=1,008)	LDA-26 Gen Z (n=115)	27-42 Millennials (n=328)	43-58 Gen X (n=246)	59+ Boomers (n=319)
1	Standard bottle	77%	58%	69%	84%	88%
2	Large glass bottle / magnum	19%	36%	29%	11%	9%
3	Small bottle	12%	18%	17%	7%	9%
4	Large bag-in-box / cask	10%	5%	8%	9%	14%
5	Small bag-in-box / cask	8%	9%	8%	8%	7%
6	Can	3%	6%	5%	2%	1%
7=	Tetra pak	2%	2%	3%	3%	1%
7=	Pouch / Bagnum	2%	3%	3%	1%	1%

Base: All Australian regular wine drinkers (n=1,008); = 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® Australia, July 2022, Jul 2023 (n=1,008), Australian regular wine drinkers

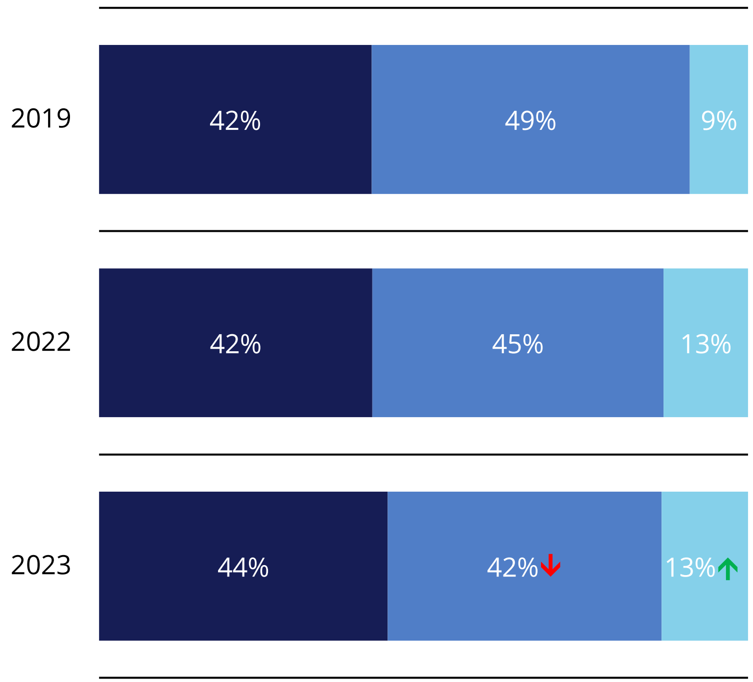
Hot Topic: Closures

Wine closures

Regular wine drinkers are showing a greater preference for screw-caps, likely due to the practicality that this type of closure offers

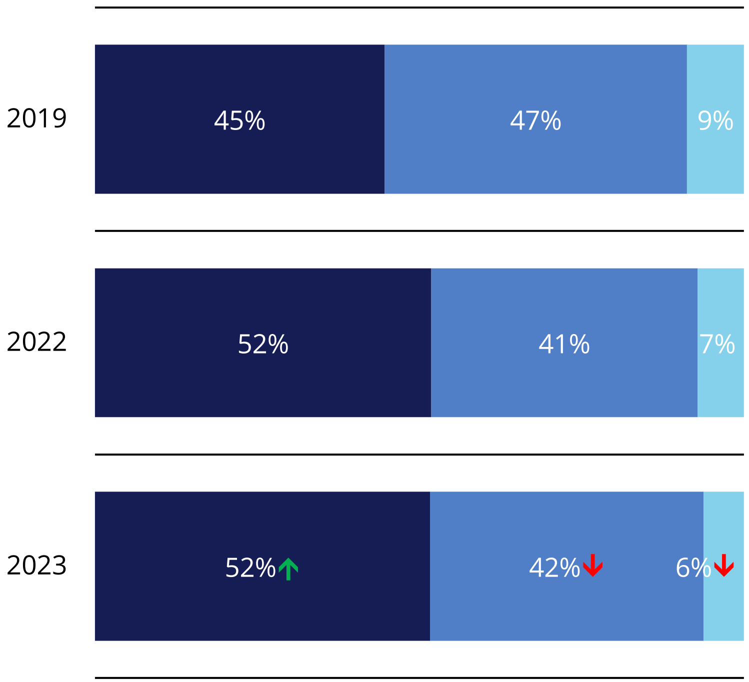
Natural cork

% who selected the shown attitudes towards this wine closure



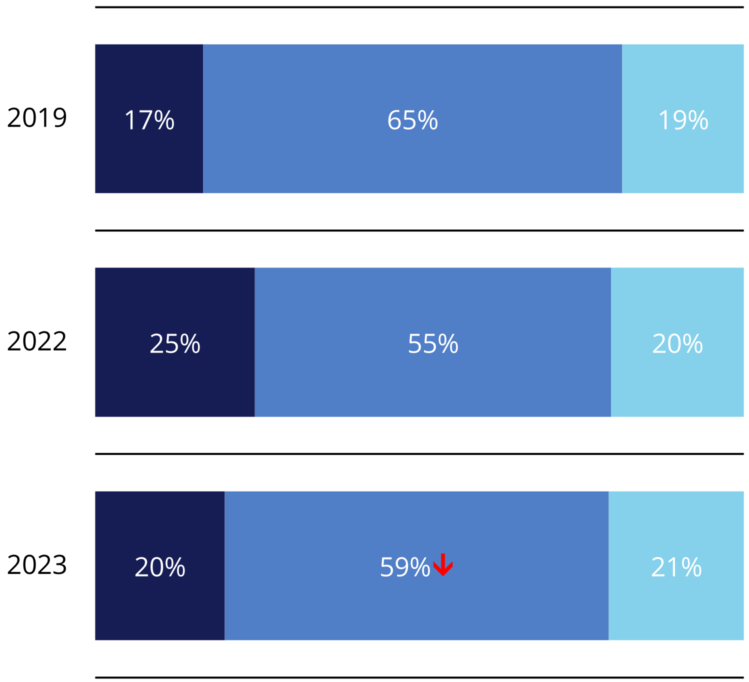
Screwcap

% who selected the shown attitudes towards this wine closure



Synthetic cork

% who selected the shown attitudes towards this wine closure



I like buying wine with this closure | Neutral | I don't like buying wine with this closure

Base: All Australian regular wine drinkers (n≥1,000);
↑/↓: Statistically significantly higher / lower than the Jul '19 wave at a 95% confidence level.
Source: IWSR, Vinitrac® Australia, July 2019 and July 2023 (n≥1,000), Australian regular wine drinkers

Views on wine closure types

Natural cork is associated with being high-quality and traditional, but also outdated, which could be fuelling a decline in preference for the closure type; screw-caps are seen as practical and good for everyday drinking

Wine closure types imagery

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

	Natural cork (n=1,008)	Screw-cap (n=1,008)	Synthetic cork (n=1,008)
Practical	15%	55%	19%
Good for everyday drinking	17%	50%	19%
High quality	44%	23%	16%
Trustworthy	32%	33%	18%
Modern	11%	44%	27%
Affordable	16%	41%	23%
Recyclable	30%	32%	17%
Traditional	55%	11%	11%
Sustainable	29%	29%	17%
Good for special occasions	39%	19%	14%
Opening a wine with this type of closure gives me pleasure	34%	21%	13%
Innovative	14%	28%	23%
Cheap	10%	29%	25%
Outdated	24%	10%	15%
Low quality	5%	15%	22%
None of the above	9%	7%	13%

Base: All Australian regular wine drinkers (n=1,008); Green/turquoise: Statistically significantly higher than 2/1 wine closure types at a 95% confidence level
Source: IWSR, Vinitrac® Australia, July 2023 (n=1,008), Australian regular wine drinkers

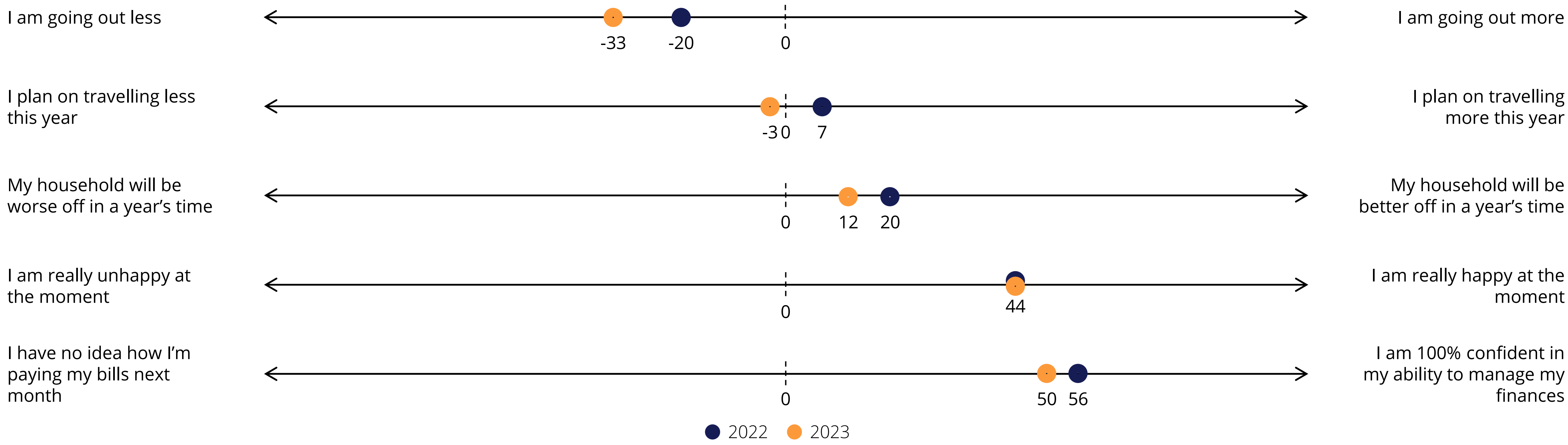
Hot Topic: Consumer Sentiment

Consumer sentiment

Despite a decrease in financial confidence over the past year, Australian regular wine drinkers remain net positive generally, though they are going out less and plan to reduce the amount they travel

Consumer sentiment: general well-being, travel and socialising, tracked

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



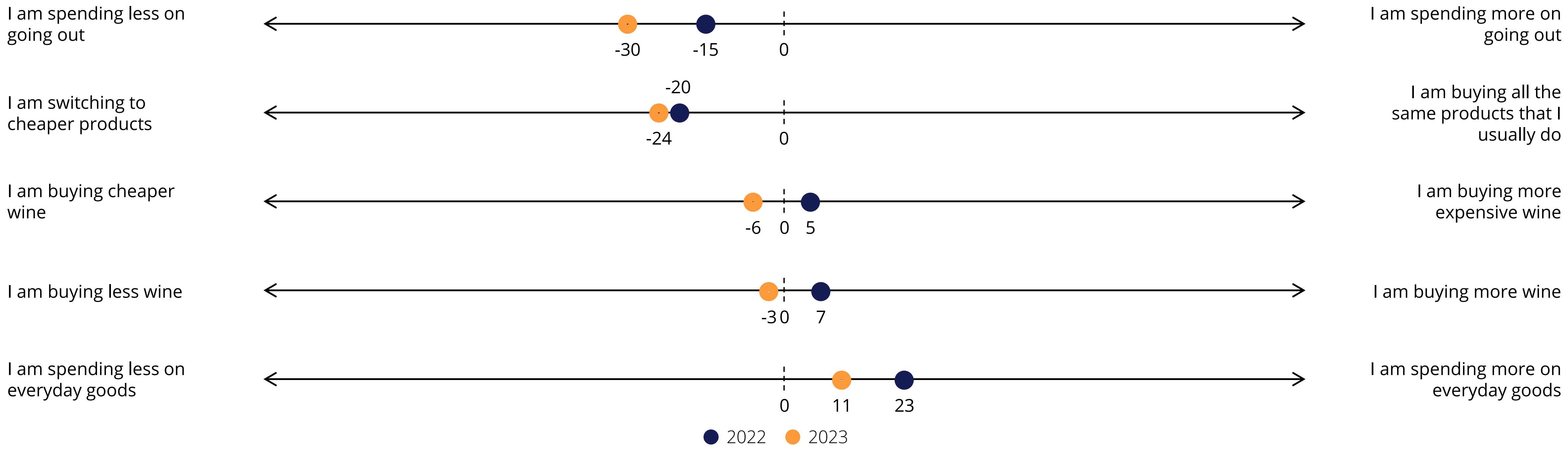
Base: All Australian regular wine drinkers (n=1,008)
Source: IWSR, Vinitrac® Australia, July 2022, July 2023 (n=1,008), Australian regular wine drinkers

Consumer sentiment

Regular wine drinkers have cut back on spending since 2022, with more saying they're spending less on going out, and buying less and cheaper wine

Consumer sentiment: spending and wine, tracked

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



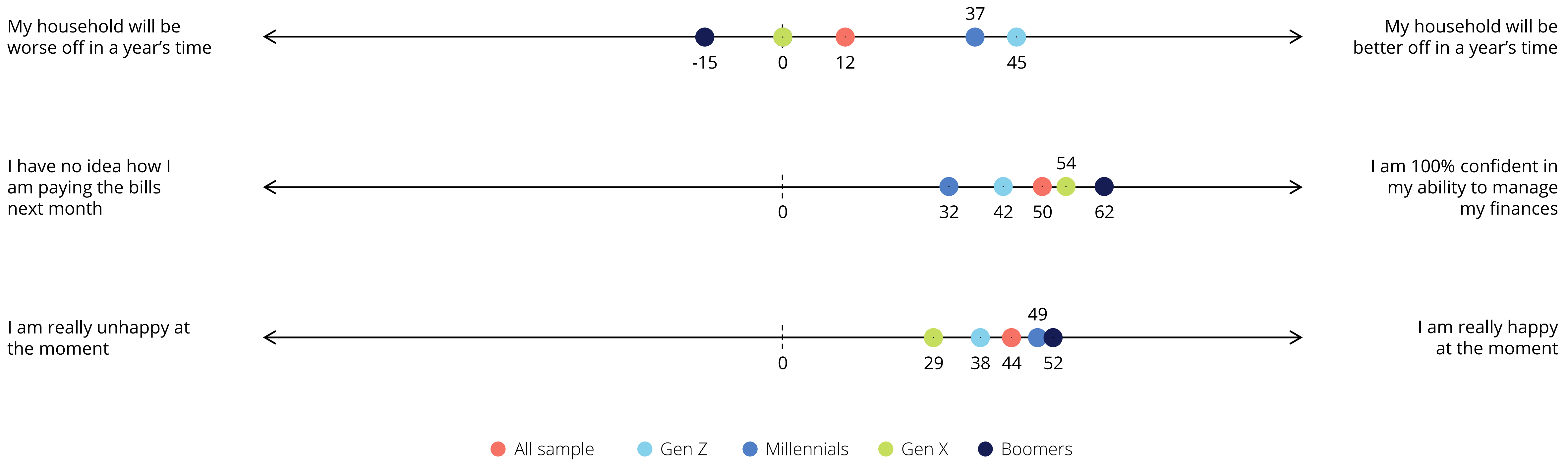
Base: All Australian regular wine drinkers (n=1,008)
Source: IWSR, Vinitrac® Australia, Jul y 2022 and July 2023 (n=1,008), Australian regular wine drinkers

Consumer sentiment

All age groups are happy at the moment, but Boomers are showing concerns about how their household finances will fair in a year's time

Consumer sentiment: general well-being

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



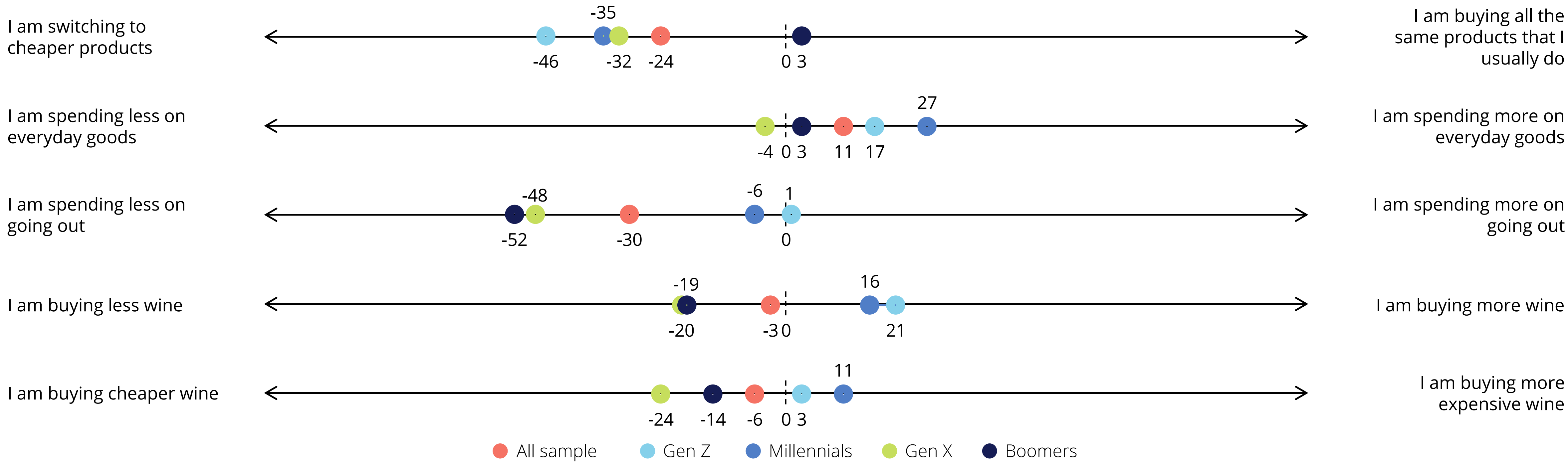
Base: All Australian regular wine drinkers (n=1,008)
Source: IWSR, Vinitrac® Australia, July 2023 (n=1,008), Australian regular wine drinkers

Consumer sentiment

Regular wine drinkers in most age groups are opting for cheaper wine and other products, and are reducing the volume of wine they buy and spending less when going out, as ways of combatting economic pressures

Consumer sentiment: spending and wine

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



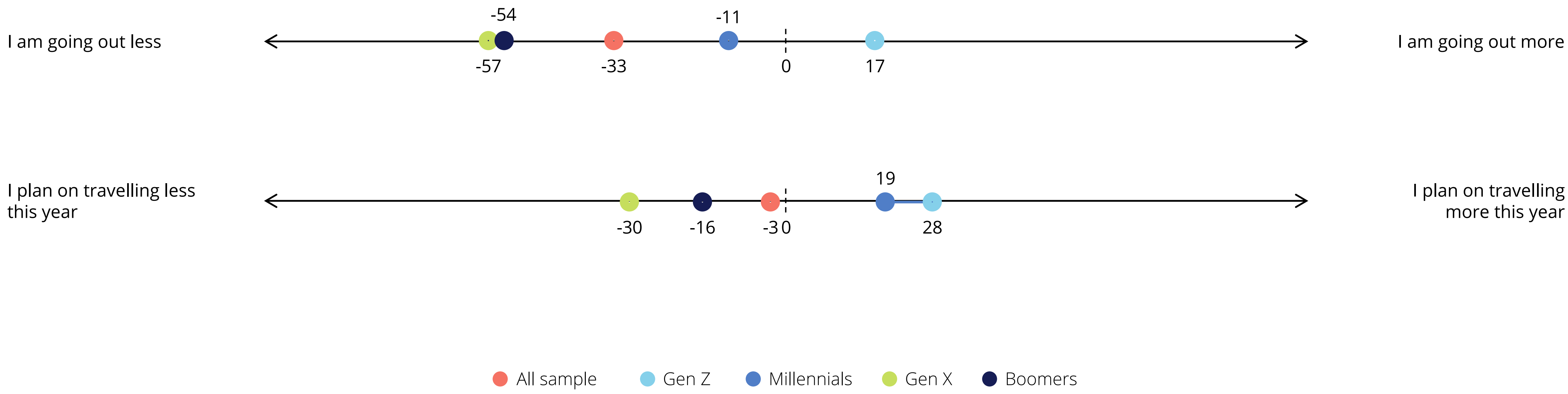
Base: All Australian regular wine drinkers (n=1,008)
Source: IWSR, Vinitrac® Australia, July 2023 (n=1,008), Australian regular wine drinkers

Consumer sentiment

Consumer sentiment about travel and socialising differs by age; Gen Z is notably keen to travel and go out more, while older groups are more conservative

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 Australian regular wine drinkers (n=1,008)
Source: IWSR, Vinitrac® Australia, July 2023 (n=1,008), Australian regular wine drinkers

Brand Health

Global Wine Brand Power Index

Brand health measures included in the index

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

Wine Brand Power Index

Brand Power

The top three most powerful brands in the Australian market are all domestically produced. Brown Brothers has overtaken both Jacob's Creek and Penfolds to become the most powerful brand among Australian regular wine drinkers, although the gap between the top three is narrow

Brown Brothers — 1st

Jacob's Creek — 2nd

Penfolds — 3rd

Australia Wine Brand Power Index 2023

Domestic brands dominate among Australian regular wine drinkers, with nine of the top 10 brands originating in the country

Australian Brand Power Index

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

Ranking '23		Final Index	Tracking vs 2022	Score difference vs 2022
1	Brown Brothers	94.7	↑+2	1.5
2	Jacob's Creek	94.4	↓-1	-0.8
3	Penfolds	92.8	↓-1	-2.0
4	Oyster Bay	82.7	↑+1	4.7
5	Wolf Blass	82.7	↓-1	-5.3
6	Yellow Tail	80.9	=	3.5
7	Pepperjack	68.6	=	0.5
8	Taylors	67.8	↑+1	6.3
9	De Bortoli	63.8	↓-1	0.3
10	Squealing Pig	63.3	↑+3	5.8
11	Hardys	59.2	=	-0.7
12	Wynns	58.1	↓-2	-2.1
13	Grant Burge	56.4	↑+10	4.5
14	McGuigan	56.3	↑+6	3.3
15	Banrock Station	55.7	↑+4	2.6
16	Cloudy Bay	55.3	↓-2	-1.9
17	Lindeman's	54.8	↓-5	-3.7
18	19 Crimes	53.6	n/a	n/a
19	Houghton	52.5	↓-3	-1.9
20	Tempus Two	52.2	↑+9	4.3
21	Peter Lehmann	51.9	↓-6	-2.9
22	Fifth Leg	51.8	↑+5	3.3
23	Rosemount Estate	51.7	↓-6	-2.5
24	Henschke	51.1	↓-3	-1.6
25	Gossips	50.9	=	0.2
26	Annie's Lane	50.2	↓-8	-3.1
27	Yalumba	49.7	↓-5	-2.8
28	Tyrrell's	49.0	↓-4	-2.1
29	Wirra Wirra	48.7	↓-1	0.7
30	Cat Amongst the Pigeons	48.5	↑+3	1.5

Note: Australia brand power comes from our annual score published in spring 2022
Source: IWSR, Vinitrac® Australia, Feb 2022 and July 2023 (n=1,008), Australian regular wine drinkers

Brand awareness

Australian regular wine drinkers have much narrower awareness of a range of brands than before the pandemic; this is part of a broader trend of declining wine knowledge

Awareness: Tracking

Percentage who have heard of the following brands

Ranking '23		2019 (n=1,000)	2022 (n=1,008)	2023 (n=1,008)	Tracking vs. '19	Tracking vs. '22
1	Jacob's Creek	85%	67%	67%	↓	→
2	Penfolds	73%	65%	64%	↓	→
3	Yellow Tail	70%	58%	63%	↓	↑
4=	Wolf Blass	76%	65%	62%	↓	→
4=	Brown Brothers	69%	59%	62%	↓	→
6=	Lindeman's	66%	54%	54%	↓	→
6=	Oyster Bay	61%	53%	54%	↓	→
8	Hardys	57%	50%	51%	↓	→
9	De Bortoli	58%	51%	50%	↓	→
10	Rosemount Estate	66%	50%	49%	↓	→
11=	Yalumba	59%	48%	48%	↓	→
11=	Taylors	53%	46%	48%	↓	→
13=	McWilliam's	60%	47%	46%	↓	→
13=	Wynns	56%	45%	46%	↓	→
15=	Coolabah	n/a	n/a	44%	n/a	n/a

Ranking '23		2019 (n=1,000)	2022 (n=1,008)	2023 (n=1,008)	Tracking vs. '19	Tracking vs. '22
15=	Banrock Station	50%	43%	44%	↓	→
17=	Pepperjack	44%	39%	42%	→	→
17=	Houghton	47%	42%	42%	↓	→
17=	McGuigan	47%	43%	42%	↓	→
20	Peter Lehmann	47%	38%	41%	↓	→
21=	Tyrrell's	49%	41%	40%	↓	→
21=	Squealing Pig	21%	35%	40%	↑	↑
21=	Gossips	41%	34%	40%	→	↑
21=	Seppelt	46%	40%	40%	↓	→
25	Fifth Leg	42%	36%	37%	↓	→
26	Eaglehawk	46%	31%	34%	↓	→
27=	Stanley Wines	38%	33%	32%	↓	→
27=	Cloudy Bay	32%	32%	32%	→	→
29	Stoneleigh	35%	29%	31%	→	→
30=	Mateus	n/a	n/a	30%	n/a	n/a

Note: Results for all brands available in the data table
Base: All Australian 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® Australia, July 2019, July 2022 and July 2023 (n≥1,000), Australian regular wine drinkers

Brand purchase

Widespread declines in awareness since 2019 have not had a knock-on effect on purchasing, which remains largely stable across the top 30, though purchase levels for Jacob's Creek have declined

Purchase: Tracking

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

Ranking '23		2019 (n=1,000)	2022 (n=1,008)	2023 (n=1,008)	Tracking vs. '19	Tracking vs. '22
1	Jacob's Creek	28%	24%	21%	↓	→
2	Brown Brothers	22%	20%	20%	→	→
3=	Penfolds	18%	20%	16%	→	→
3=	Yellow Tail	18%	17%	16%	→	→
5	Wolf Blass	20%	18%	15%	↓	↓
6	Oyster Bay	15%	14%	12%	→	→
7	Pepperjack	10%	10%	9%	→	→
8=	De Bortoli	9%	11%	8%	→	→
8=	Squealing Pig	3%	7%	8%	↑	→
8=	Gossips	11%	10%	8%	↓	→
11=	Taylors	10%	10%	7%	→	→
11=	Lindeman's	7%	6%	7%	→	→
13=	Wynns	8%	8%	6%	→	→
13=	Hardys	4%	9%	6%	→	↓
13=	Banrock Station	8%	7%	6%	→	→

Ranking '23		2019 (n=1,000)	2022 (n=1,008)	2023 (n=1,008)	Tracking vs. '19	Tracking vs. '22
16=	Fifth Leg	6%	6%	5%	→	→
16=	Houghton	5%	6%	5%	→	→
16=	Annie's Lane	4%	4%	5%	→	→
16=	McGuigan	6%	6%	5%	→	→
16=	Cloudy Bay	4%	5%	5%	→	→
16=	Grant Burge	4%	5%	5%	→	→
16=	19 Crimes	n/a	6%	5%	n/a	→
23=	Villa Maria	3%	4%	4%	→	→
23=	Giesen	3%	5%	4%	→	→
23=	Tempus Two	3%	4%	4%	→	→
23=	Rosemount Estate	6%	6%	4%	→	↓
23=	McWilliam's	4%	5%	4%	→	→
23=	Evans & Tate	4%	4%	4%	→	→
23=	Peter Lehmann	6%	4%	4%	↓	→
30=	Matua	3%	5%	3%	→	↓

Note: Results for all brands available in the data table
Base: All Australian 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® Australia, July 2019, July 2022, July 2023 (n≥1,000), Australian regular wine drinkers

Brand conversion

Conversion rates for most brands have remained stable, with Brown Brothers and Jacob's Creek the leaders for this brand health measure

Conversion: Tracking

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

Ranking '23		2019	2022	2023	Tracking vs. '19	Tracking vs. '22
1=	Brown Brothers	32%	34%	32%	→	→
1=	Jacob's Creek	33%	36%	32%	→	→
3	Penfolds	25%	30%	26%	→	→
4	Yellow Tail	26%	30%	25%	→	→
5	Wolf Blass	26%	28%	24%	→	↓
6=	Oyster Bay	25%	26%	23%	→	→
6=	Winesmiths	n/a	23%	23%	n/a	→
8=	19 Crimes	n/a	31%	21%	n/a	↓
8=	Pepperjack	22%	25%	21%	→	→
10=	Squealing Pig	16%	20%	20%	→	→
10=	Villa Maria	14%	21%	20%	→	→
12=	Gossips	27%	28%	19%	↓	↓
12=	Cat Amongst The Pigeons	13%	22%	19%	→	→
14=	Baily & Baily	13%	19%	18%	→	→
14=	Annie's Lane	13%	16%	18%	→	→

Ranking '23		2019	2022	2023	Tracking vs. '19	Tracking vs. '22
16=	Kim Crawford	n/a	n/a	17%	n/a	n/a
16=	Tempus Two	17%	19%	17%	→	→
16=	De Bortoli	16%	20%	17%	→	→
16=	Grant Burge	15%	20%	17%	→	→
20=	Matua	15%	23%	16%	→	→
20=	Wahu	24%	31%	16%	→	↓
22=	Taylors	18%	21%	15%	→	↓
22=	Giesen	13%	19%	15%	→	→
22=	d'Arenberg	11%	15%	15%	→	→
22=	Cloudy Bay	13%	16%	15%	→	→
26=	Wynns	14%	17%	14%	→	→
26=	Fifth Leg	15%	17%	14%	→	→
26=	Banrock Station	16%	17%	14%	→	→
26=	Barefoot	n/a	26%	14%	n/a	↓
26=	Brancott Estate	7%	13%	14%	↑	→

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® Australia, July 2019, July 2022 and July 2023 (n≥1,000), Australian regular wine drinkers

Brand consideration

Australian regular wine drinkers consider a narrower range of brands than in 2019, with three of the top four having significantly lower consideration rates

Consideration: Tracking

Percentage who would consider buying the following brands

Ranking '23		2019	2022	2023	Tracking vs. '19	Tracking vs. '22
1	Brown Brothers	72%	66%	65%	↓	→
2	Oyster Bay	68%	58%	63%	→	→
3	Penfolds	66%	64%	61%	↓	→
4	Jacob's Creek	72%	64%	60%	↓	→
5=	Annie's Lane	59%	55%	58%	→	→
5=	Tempus Two	61%	47%	58%	→	↑
5=	Pepperjack	64%	58%	58%	→	→
8	Grant Burge	60%	58%	57%	→	→
9	Wolf Blass	68%	61%	56%	↓	→
10	Henschke	n/a	54%	54%	n/a	→
11=	Cat Amongst The Pigeons	55%	52%	53%	→	→
11=	Cloudy Bay	60%	58%	53%	→	→
13	Taylors	59%	50%	52%	↓	→
14=	d'Arenberg	50%	47%	50%	→	→
14=	Evans & Tate	59%	47%	50%	↓	→
14=	19 Crimes	n/a	51%	50%	n/a	→
17=	De Bortoli	58%	49%	49%	↓	→
17=	Shaw + Smith	66%	48%	49%	↓	→
19=	Wynns	55%	51%	48%	↓	→
19=	Yellow Tail	57%	52%	48%	↓	→
21=	McGuigan	51%	46%	47%	→	→
21=	Peter Lehmann	58%	50%	47%	↓	→
21=	Lindeman's	51%	43%	47%	→	→
21=	Wahu	61%	47%	47%	↓	→
25=	Wirra Wirra	57%	45%	46%	↓	→
25=	Villa Maria	53%	43%	46%	→	→
25=	Giesen	48%	51%	46%	→	→
25=	Squealing Pig	55%	51%	46%	↓	→
25=	Kim Crawford	n/a	n/a	46%	n/a	n/a
30=	Fifth Leg	54%	45%	45%	↓	→

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® Australia, July 2019, July 2022 and July 2023 (n≥1,000), Australian regular wine drinkers

Brand affinity

Most wine brand affinity scores in the Australian market are similar to 2019, though connection levels among Jacob's Creek have declined

Affinity: Tracking

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

Ranking '23		2019	2022	2023	Tracking vs. '19	Tracking vs. '22
1	Brown Brothers	56%	53%	53%	→	→
2	Penfolds	48%	46%	50%	→	→
3	Jacob's Creek	53%	49%	48%	↓	→
4	Oyster Bay	49%	43%	47%	→	→
5	Pepperjack	47%	44%	44%	→	→
6	Wolf Blass	48%	44%	43%	→	→
7	Tempus Two	42%	32%	42%	→	↑
8	Henschke	n/a	43%	41%	n/a	→
9	Annie's Lane	40%	36%	40%	→	→
10	Grant Burge	42%	43%	39%	→	→
11=	Squealing Pig	37%	37%	38%	→	→
11=	Cloudy Bay	41%	42%	38%	→	→
13=	Taylors	42%	37%	37%	→	→
13=	Yellow Tail	42%	40%	37%	↓	→
15=	19 Crimes	n/a	46%	36%	n/a	↓

Ranking '23		2019	2022	2023	Tracking vs. '19	Tracking vs. '22
15=	Wahu	38%	40%	36%	→	→
17	Shaw + Smith	41%	36%	35%	→	→
18=	De Bortoli	37%	33%	33%	→	→
18=	Villa Maria	31%	30%	33%	→	→
18=	Cat Amongst The Pigeons	37%	48%	33%	→	↓
18=	Wynns	41%	34%	33%	↓	→
18=	Giesen	34%	36%	33%	→	→
23=	d'Arenberg	39%	34%	32%	→	→
23=	Banrock Station	35%	31%	32%	→	→
23=	Fifth Leg	38%	33%	32%	→	→
23=	Tyrrell's	31%	28%	32%	→	→
27=	McGuigan	34%	32%	31%	→	→
27=	Peter Lehmann	38%	33%	31%	↓	→
27=	Evans & Tate	41%	36%	31%	↓	→
27=	Lindeman's	33%	27%	31%	→	→

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® Australia, July 2019, July 2022 and July 2023 (n≥1,000), Australian regular wine drinkers

Brand recommendation

Penfolds is now the brand with the highest recommendation rate among Australian regular wine drinkers, with significantly more willing to recommend it than in 2019 and 2022

Recommendation: Tracking

Percentage who would recommend the following brands to a friend

Ranking '23		2019	2022	2023	Tracking vs. '19	Tracking vs. '22
1	Penfolds	44%	44%	49%	↑	↑
2	Brown Brothers	52%	49%	47%	→	→
3	Pepperjack	45%	40%	40%	→	→
4	Oyster Bay	43%	38%	39%	→	→
5=	Henschke	n/a	37%	36%	n/a	→
5=	Grant Burge	38%	38%	36%	→	→
5=	Jacob's Creek	46%	42%	36%	↓	↓
8=	Tempus Two	33%	33%	35%	→	→
8=	Wolf Blass	43%	39%	35%	↓	→
8=	Shaw + Smith	39%	34%	35%	→	→
11=	d'Arenberg	34%	25%	34%	→	↑
11=	Annie's Lane	34%	33%	34%	→	→
11=	19 Crimes	n/a	41%	34%	n/a	→
14=	Taylors	35%	33%	30%	→	→
14=	Cloudy Bay	33%	37%	30%	→	→

Ranking '23		2019	2022	2023	Tracking vs. '19	Tracking vs. '22
14=	Giesen	27%	36%	30%	→	→
17=	Wahu	34%	37%	28%	→	→
17=	Wirra Wirra	34%	29%	28%	→	→
17=	Winesmiths	n/a	27%	28%	n/a	→
17=	Yellow Tail	33%	34%	28%	↓	↓
21=	Cat Amongst The Pigeons	29%	34%	27%	→	→
21=	Villa Maria	29%	31%	27%	→	→
21=	Kim Crawford	n/a	n/a	27%	n/a	n/a
21=	Squealing Pig	28%	29%	27%	→	→
25=	De Bortoli	31%	28%	26%	↓	→
25=	Wynns	34%	29%	26%	↓	→
25=	Evans & Tate	34%	25%	26%	↓	→
28=	Peter Lehmann	32%	28%	25%	↓	→
28=	Brand's Laira	32%	28%	25%	→	→
30	Tyrrell's	26%	24%	24%	→	→

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® Australia, July 2019, July 2022 and July 2023 (n≥1,000), Australian regular wine drinkers

Research Methodology

Research methodology

Quantitative

The data was collected in Australia since March 2016.

The July 2019 and July 2022 waves were tracked against July 2023.

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

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

Invalid respondents (those who sped through the survey or gave inconsistent answers to selected questions) were removed before analysis.

The data is representative of Australian regular wine drinkers in terms of gender*, age and region.

The distribution of the sample is shown in the table.

*Please note that additional Gender categories were also surveyed. These categories fell naturally in the sample and were not enforced via quotas.

		Jul-19	*Jul-22*	*Jul-23*
	n=	*1,000*	*1,008*	*1,008*
Gender*	Male	50%	55%	50%
	Female	50%	45%	50%
	Total	***100%***	***100%***	***100%***
Age	LDA-24	13%	8%	7%
	25-34	19%	21%	20%
	35-44	16%	21%	20%
	45-54	15%	17%	16%
	55-64	16%	12%	14%
	65 and over	20%	20%	22%
	Total	***100%***	***100%***	***100%***
Region	Australian Capital Territory	1%	2%	1%
	New South Wales	33%	35%	34%
	Northern Territory	2%	1%	1%
	Queensland	18%	19%	19%
	South Australia	7%	7%	6%
	Tasmania	1%	2%	2%
	Victoria	29%	27%	28%
	Western Australia	9%	8%	9%
	Total	***100%***	***100%***	***100%***

Source: IWSR, Vinitrac® Australia July 2019, July 2022 and July 2023 (n≥1,000), Australian 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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www.theiwsr.com

enquiries@theiwsr.com

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