WINE INTELLIGENCE

AUSTRALIA: WINE PACKAGING FORMATS

SEPTEMBER 2020

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INTRODUCTION

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

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

Casks continue to perform well in the Australian market, with a significant increase in awareness of smaller casks since 2017. However, casks of all size remain primarily associated with value for money and lower quality wine – a legacy they are yet to move away from. The main barrier to purchasing alternative packaging formats is the long-standing and habitual preference for standard glass bottles, with these being more dominant in Australia than other comparable established markets. Smaller format bottles continue to be seen as delivering comparatively poor value for money, whilst magnums are seen as less practical and portable. In terms of which types of consumers are leading the opportunity for alternative formats for wine in Australia, awareness of these options is significantly higher amongst older 'Boomer' consumers. As for wine in cans, countering the typical view of trade experts, awareness of wine in cans is actually significantly higher amongst 40-55 year olds rather than amongst younger Gen Z and Millennials consumers. However, despite having generally lower awareness of alternative wine packaging formats, purchase of these formats is higher amongst younger drinkers, once they become aware of the options available.

MANAGEMENT SUMMARY

KEY TAKEAWAYS: AUSTRALIA WINE PACKAGING FORMATS 2020

Despite an increasing awareness of smaller formats for wine is not yet translating into increased purchase rates for these alternative formats

The main barrier to purchasing alternative packaging format is the underlying preference for standard glass bottles; with the perception that smaller format bottles are poorer value for money and magnums are not convenient to carry

Awareness of alternative packaging formats for wine is significantly higher amongst older consumers – Boomers

- Awareness of wine in cans significantly higher amongst 40-55 year olds, and much higher than for younger Gen Z and Millennials consumers

Despite having generally lower awareness of alternative wine packaging formats, purchase of these formats is higher amongst younger drinkers once they become aware of the options available

MANAGEMENT SUMMARY

Significantly higher awareness of alternative packaging format for wine amongst older consumers, whilst awareness of wine in cans significantly higher amongst 40-55 year olds, and much higher than for younger Gen Z and Millennials consumers

Awareness of alternative packaging formats is led by Boomers

Older consumers (55+) are more likely than others to be aware of a variety of alternative packaging formats for wine

A significantly higher proportion of those aged between 40 and 54 years old are aware of wine in cans compared with all other Australian regular wine drinkers

Packaging awareness: By gender & age groups

% who are aware of the following packaging types
Base = All Australian regular wine drinkers (n=1,000)

			Gender		Age groups			
Rank 2020		Australian regular wine drinkers	Male	Female	18-24 [Gen Z]	25-39 [Millennials]	40-54 [Gen X]	55+ [Boomers]
	n=	*1,000*	*536*	*464*	*90*	*288*	*272*	*350*
1	Standard glass bottle (750 ml)	88%	87%	88%	76%	79%	90%	96%
2	Small cask (2 or 3L)	67%	64%	71%	42%	47%	75%	84%
3	Large cask (4 or 5L)	63%	61%	66%	42%	44%	67%	82%
4	Large bottle / magnum (1.5L)	63%	61%	65%	55%	55%	61%	72%
5	Small bottle (single serve)	57%	53%	62%	40%	46%	65%	65%
6	Half bottle (375ml)	55%	58%	52%	56%	48%	55%	61%
7	Wine in a can	33%	29%	37%	23%	33%	40%	30%

Red / Blue: Statistically significantly higher / lower than all Australian regular wine drinkers at a 95% confidence level
Source: Wine Intelligence, Vinitrac® Australia, Jul'20, n=1,000 Australian regular wine drinkers

MANAGEMENT SUMMARY

wine intelligence

Despite lower awareness levels of alternative formats for wine, purchase of alternative wine packaging formats is higher amongst Gen-Z and Millennials once they are aware of these options

Despite younger consumers having generally lower awareness levels of alternative wine packaging formats, they are more likely to purchase these alternative packaging types compared with other Australian consumers, particularly 1.5L and 375ml glass bottles

The view amongst the trade is that these younger consumers are more willing to purchase alternative formats due to their experimental nature and consuming wine more frequently at occasions best suited for alternative packaging, such as outdoor events

WHAT DO MARKET EXPERTS SAY?

"Cans are driven by the under 30s. They are more open minded about wine and having different occasions that they're buying it for"

Marketing Manager, Producer, Australia

Packaging purchase: By gender & age groups

% who have purchased each packaging type in the past 6 months
Base = All Australian regular wine drinkers (n=1,000)

			Gender		Age groups			
Rank 2020		Australian regular wine drinkers	Male	Female	18-24 [Gen Z]	25-39 [Millennials]	40-54 [Gen X]	55+ [Boomers]
	n=	*1,000*	*536*	*464*	*90*	*288*	*272*	*350*
1	Standard glass bottle (750 ml)	78%	78%	79%	56%	70%	84%	87%
2	Large cask (4 or 5L)	15%	15%	16%	21%	10%	16%	18%
3	Large bottle / magnum (1.5L)	12%	12%	11%	24%	16%	10%	5%
4	Small cask (2 or 3L)	11%	13%	9%	13%	11%	11%	12%
5	Half bottle (375ml)	11%	15%	7%	22%	20%	8%	4%
6	Small bottle (single serve)	7%	7%	8%	10%	10%	7%	4%
7	Wine in a can	4%	4%	3%	6%	7%	3%	1%

Wine Intelligence Trade Interview Programme 2020
Red / Blue: Statistically significantly higher / lower than all Australian regular wine drinkers at a 95% confidence level
Source: Wine Intelligence, Vinitrac® Australia, Jul'20, n=1,000 Australian regular wine drinkers

MANAGEMENT SUMMARY

Increasing awareness of smaller formats is not translating across to increased purchase rates

The conversion to purchase rate amongst those aware of wine in both small bottles (single serve) and cans has declined over the past three years, meaning that growing awareness is not currently translating across to purchase at the same rate

Trade experts predict that there are opportunities for smaller formats to support increasing moves to alcohol moderation and consumer demand for single serve to increase choice

Packaging conversion: Tracking

% who have purchased each packaging type in the past 6 months
Base = All Australian regular wine drinkers who are aware of the following packaging formats for wine

Rank 2020	n=	2017 *1,000*	2020 *1,000*	Tracking vs. '17
1	Standard glass bottle (750 ml)	93%	89%	⬇
2	Large cask (4 or 5L)	25%	24%	➡
3	Half bottle (375ml)	18%	21%	➡
4	Large bottle / magnum (1.5L)	20%	18%	➡
5	Small cask (2 or 3L)	19%	17%	➡
6	Small bottle (single serve)	20%	13%	⬇
7	Wine in a can	20%	11%	⬇

WHAT DO MARKET EXPERTS SAY?

"There's demand for single serve midweek products. If I want a glass and I live by myself, I don't want to open a whole bottle. I think that is where smaller bottles and can deliver because of the smaller serving size"

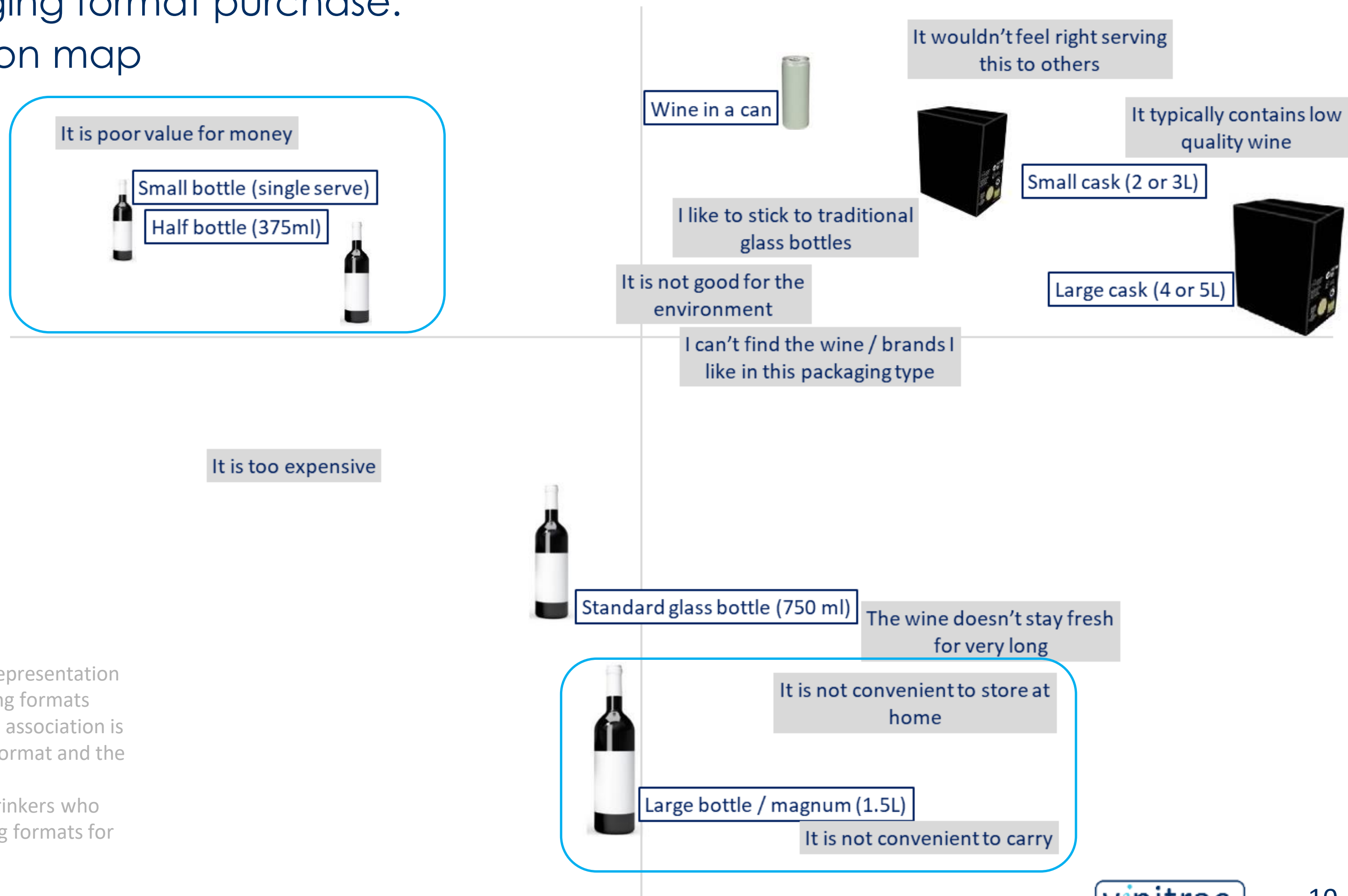
Marketing Manager, Producer, Australia

Wine Intelligence Trade Interview Programme 2020
⬆ / ⬇ : Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac® Australia, Oct'17 and Jul'20, n=1,000 Australian regular wine drinkers

MANAGEMENT SUMMARY

The main barrier to purchasing alternative packaging format is the underlying preference for standard glass bottles; with the perception that smaller format bottles are poorer value for money and magnums are not convenient to carry

Barriers to packaging format purchase:
Imagery perception map



The positioning map is a graphical representation of the association between packaging formats and statements. The strength of the association is measure by how far the packaging format and the statement are from the centre
Base = All Australian regular wine drinkers who are aware of the following packaging formats for wine

Source: Wine Intelligence, Vinitrac® Australia, Jul'20, n=1,000 Australian regular wine drinkers

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PACKAGING FORMATS TESTED

Standard glass bottle (750 ml)

Large bottle / magnum (1.5L)

Half bottle (375ml)

Small bottle (single serve)

Wine in a can

Large cask (4 or 5L)

Small cask (2 or 3L)

Packaging formats were shown in a randomised order to avoid bias

ATTITUDES TOWARDS PACKAGING FORMATS IN AUSTRALIA

An increasing proportion of consumers are aware of smaller formats for wine - half bottles and cans - but this is yet to translate into increased purchase

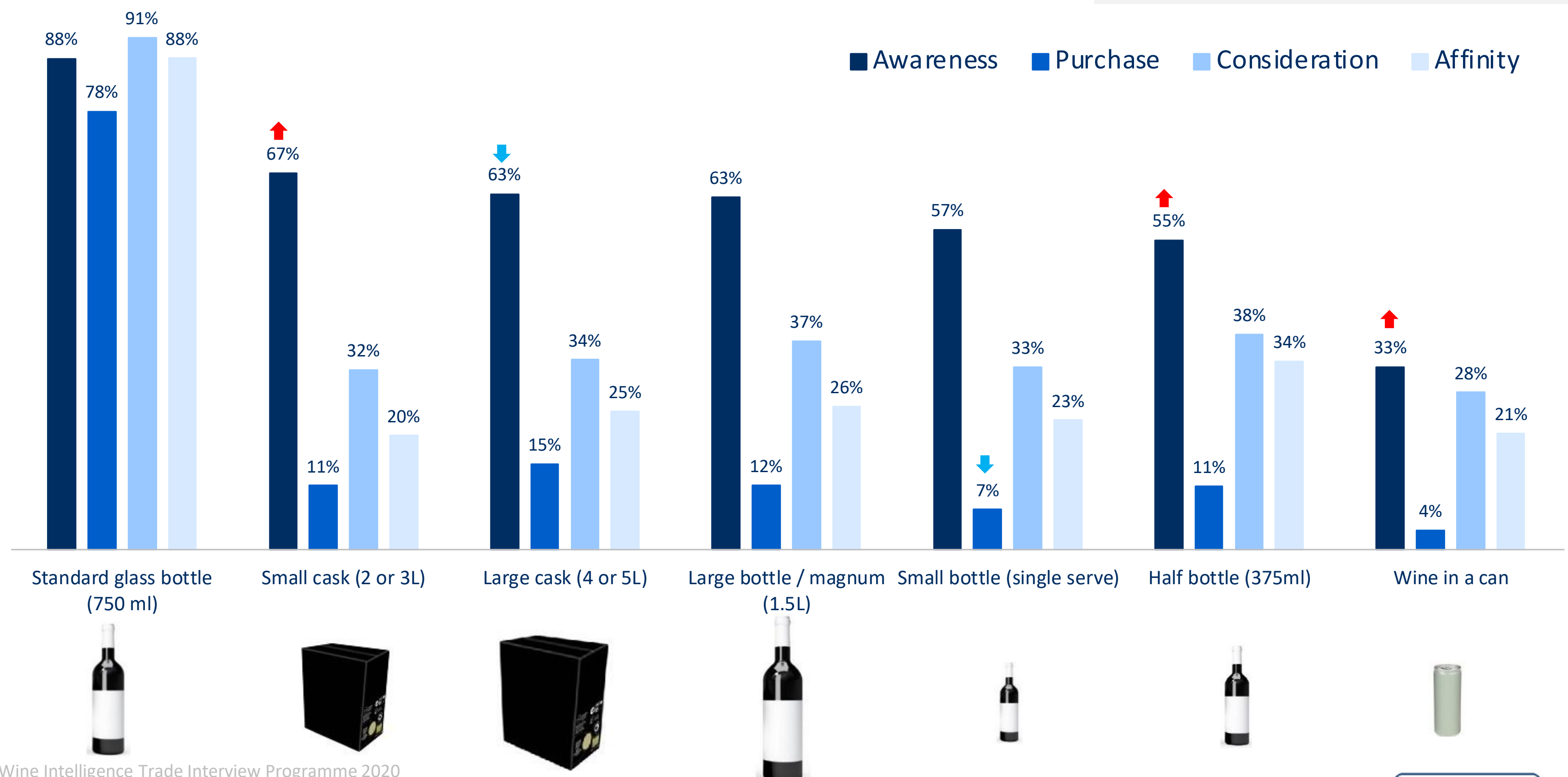
WHAT DO MARKET EXPERTS SAY?

"We are certainly seeing cask drinkers migrate to smaller cask sizes of two litres"

Category Manager, National Retailer, Australia

Packaging attitudes

% who are aware of the following packaging types
Base for awareness and purchase = All Australian regular wine drinkers (n=1,000)
Base for consideration and affinity = All those aware of the packaging type



Wine Intelligence Trade Interview Programme 2020
⬆ / ⬇ : Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac® Australia, Oct'17 and Jul'20, n=1,000 Australian regular wine drinkers

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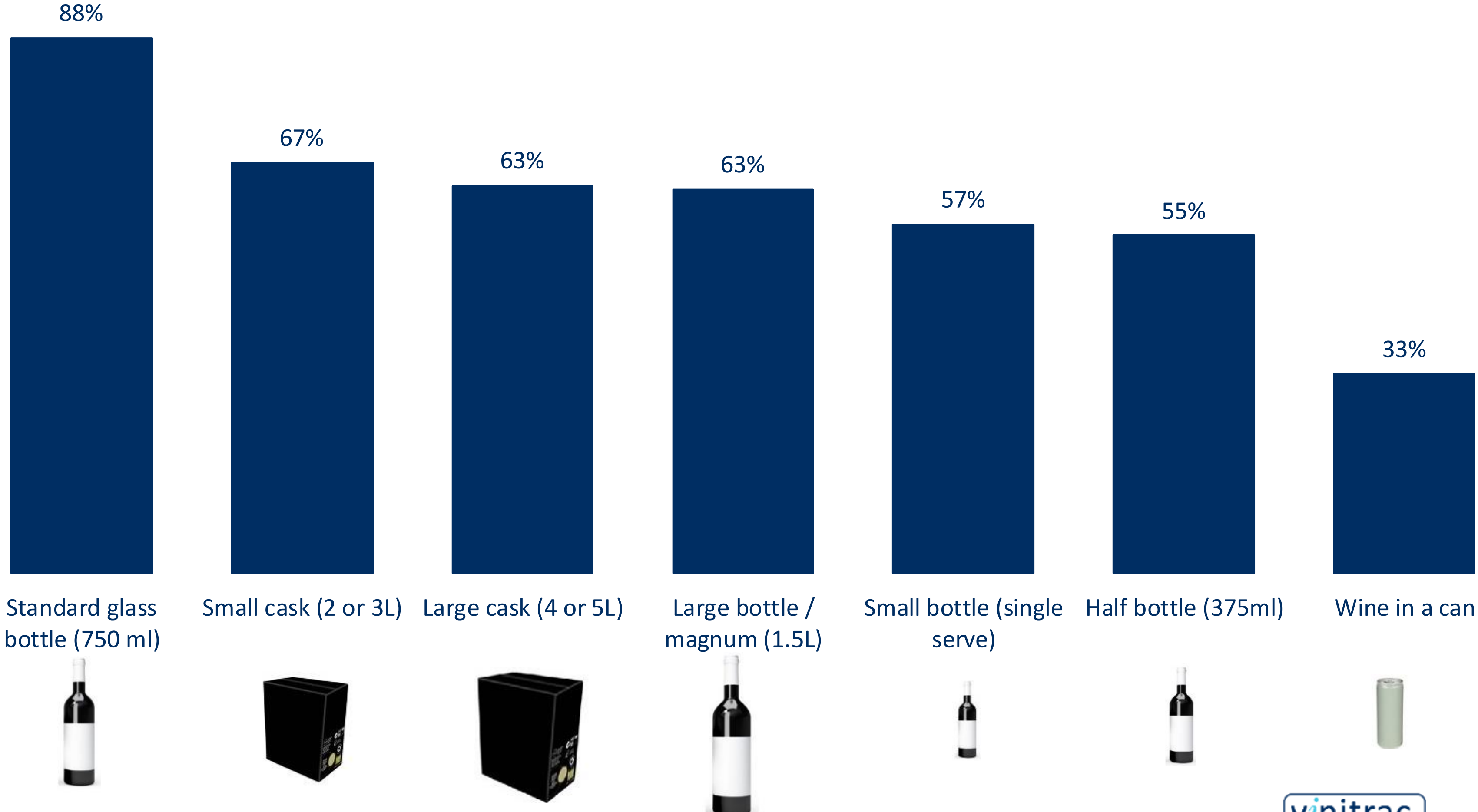
PACKAGING AWARENESS

High awareness levels of alternative wine packaging formats in Australia, with wine in cans known by a third of Australian regular wine drinkers

Packaging awareness

% who are aware of the following packaging types
Base = All Australian regular wine drinkers (n=1,000)



Source: Wine Intelligence, Vinitrac® Australia, Jul’20, n=1,000 Australian regular wine drinkers

PACKAGING AWARENESS

Long-term awareness of small casks, cans and half bottles has increased since 2017, albeit from a small base for those aware of wine in cans

Packaging awareness: Tracking

% who are aware of the following packaging types
Base = All Australian regular wine drinkers (n=1,000)

Rank 2020	n=	2017 1,000	2020 1,000	Tracking vs. '17
1	Standard glass bottle (750 ml)	88%	88%	→
2	Small cask (2 or 3L)	62%	67%	↑
3	Large cask (4 or 5L)	69%	63%	↓
4	Large bottle / magnum (1.5L)	61%	63%	→
5	Small bottle (single serve)	55%	57%	→
6	Half bottle (375ml)	49%	55%	↑
7	Wine in a can	11%	33%	↑

WHAT DO MARKET EXPERTS SAY?

"Cask has definitely grown, it's in double digit growth just through the pandemic so that's got a huge lift"

Marketing Manager, Producer, Australia

"There is growth for cans but still from a small base. I think what has had good growth over the past 12 months is smaller format bottles. People are managing their consumption or moderating with formats smaller than 750ml"

Marketing Manager, Producer, Australia

Wine Intelligence Trade Interview Programme 2020
↑ / ↓ : Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac® Australia, Oct'17 and Jul'20, n=1,000 Australian regular wine drinkers

PACKAGING AWARENESS

Older consumers (over 55) are more likely than others to be aware of a variety of alternative packaging formats for wine, with significantly higher awareness for cans amongst 40-54 yr olds

Packaging awareness: By gender & age groups

% who are aware of the following packaging types
Base = All Australian regular wine drinkers (n=1,000)

			Gender		Age groups			
Rank 2020		Australian regular wine drinkers	Male	Female	18-24 [Gen Z]	25-39 [Millennials]	40-54 [Gen X]	55+ [Boomers]
	n=	*1,000*	*536*	*464*	*90*	*288*	*272*	*350*
1	Standard glass bottle (750 ml)	88%	87%	88%	76%	79%	90%	96%
2	Small cask (2 or 3L)	67%	64%	71%	42%	47%	75%	84%
3	Large cask (4 or 5L)	63%	61%	66%	42%	44%	67%	82%
4	Large bottle / magnum (1.5L)	63%	61%	65%	55%	55%	61%	72%
5	Small bottle (single serve)	57%	53%	62%	40%	46%	65%	65%
6	Half bottle (375ml)	55%	58%	52%	56%	48%	55%	61%
7	Wine in a can	33%	29%	37%	23%	33%	40%	30%

Red / Blue: Statistically significantly higher / lower than all Australian regular wine drinkers at a 95% confidence level
Source: Wine Intelligence, Vinitrac® Australia, Jul'20, n=1,000 Australian regular wine drinkers

PACKAGING AWARENESS

Mainstream Matures – older, confident and the most knowledgeable wine drinkers - are more likely to be aware of alternative packaging formats for wine compared with other drinkers in Australia

Packaging awareness: By Portraits

% who are aware of the following packaging types
Base = All Australian regular wine drinkers (n=1,000)

			Portraits					
Rank 2020	n=	Australian regular wine drinkers	Engaged Explorers	Social Newbies	Mainstream Matures	Contented Treaters	Senior Bargain Hunters	Kitchen Casuals
		1,000	*93*	*162*	*168*	*139*	*208*	*231*
1	Standard glass bottle (750 ml)	88%	81%	71%	95%	89%	94%	89%
2	Small cask (2 or 3L)	67%	47%	41%	83%	69%	81%	69%
3	Large cask (4 or 5L)	63%	49%	40%	78%	65%	72%	66%
4	Large bottle / magnum (1.5L)	63%	60%	55%	75%	68%	65%	56%
5	Small bottle (single serve)	57%	50%	42%	78%	55%	66%	49%
6	Half bottle (375ml)	55%	54%	53%	66%	56%	56%	49%
7	Wine in a can	33%	27%	26%	45%	37%	34%	27%

Red / Blue: Statistically significantly higher / lower than all Australian regular wine drinkers at a 95% confidence level
Source: Wine Intelligence, Vinitrac® Australia, Jul'20, n=1,000 Australian regular wine drinkers

PACKAGING AWARENESS

Minimal differences in packaging awareness amongst wine groups, with the least involved segment of consumers being less aware of large bottles / magnums (1.5L) and wine in cans

wine intelligence

Packaging awareness: By wine involvement

% who are aware of the following packaging types
Base = All Australian regular wine drinkers (n=1,000)

Rank 2020		Australian regular wine drinkers	Wine involvement: Low involvement	Medium involvement	High involvement
	n=	*1,000*	*279*	*403*	*318*
1	Standard glass bottle (750 ml)	88%	87%	88%	87%
2	Small cask (2 or 3L)	67%	68%	68%	66%
3	Large cask (4 or 5L)	63%	66%	64%	61%
4	Large bottle / magnum (1.5L)	63%	56%	65%	67%
5	Small bottle (single serve)	57%	53%	59%	58%
6	Half bottle (375ml)	55%	50%	58%	56%
7	Wine in a can	33%	25%	35%	37%

WHAT DO MARKET EXPERTS SAY?

"There have been some larger bottles / magnums that have done okay in rosé and sparkling. However, I don't think it's ever going to be a big part of the market"

Marketing Manager, Producer, Australia

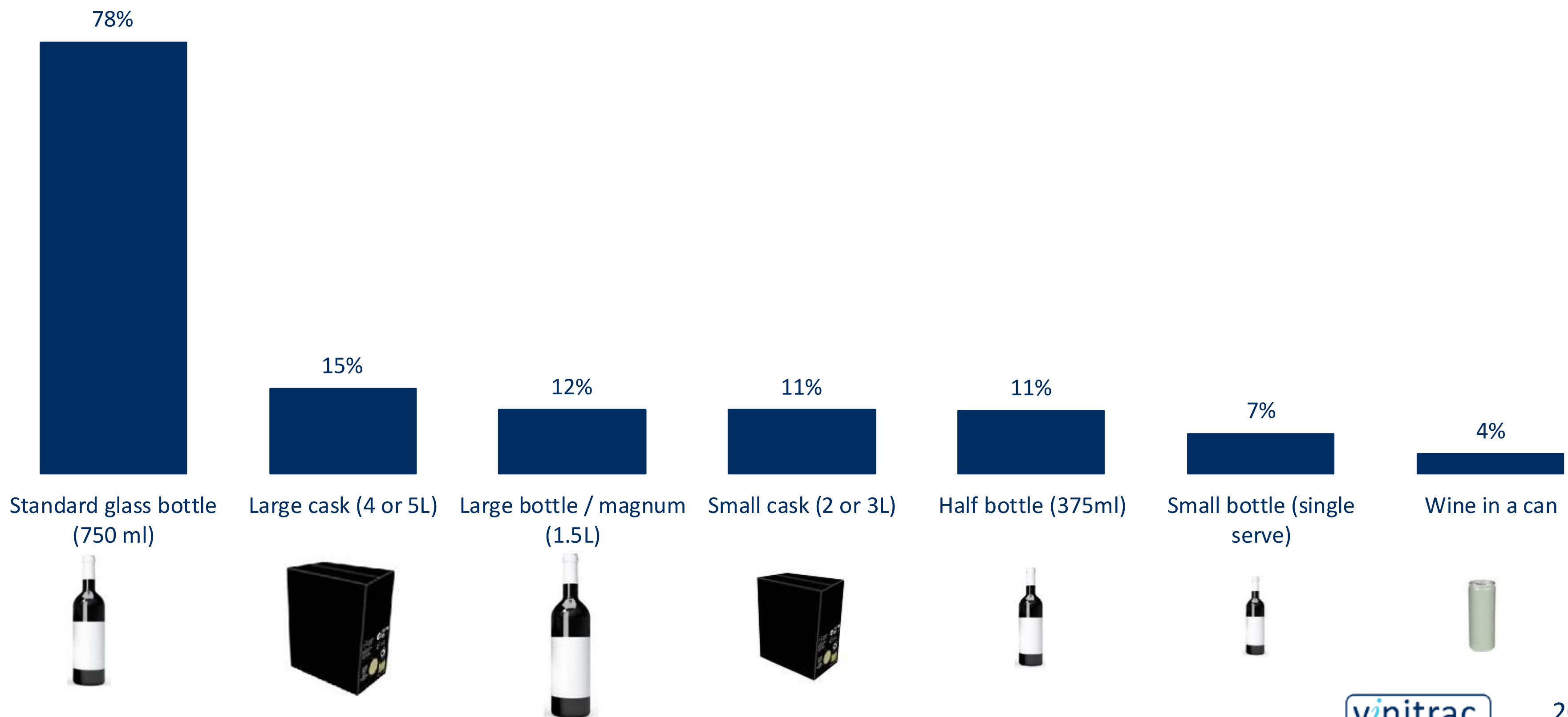
Wine Intelligence Trade Interview Programme 2020
Red / Blue: Statistically significantly higher / lower than all Australian regular wine drinkers at a 95% confidence level
Source: Wine Intelligence, Vinitrac® Australia, Jul'20, n=1,000 Australian regular wine drinkers

PACKAGING PURCHASE

Standard glass bottles (750ml) continues to dominate in the Australian market, while the increased awareness of wines in cans has not yet translated into a substantial increase in purchase

Packaging purchase

% who have purchased each packaging type in the past 6 months
Base = All Australian regular wine drinkers (n=1,000)



Source: Wine Intelligence, Vinitrac® Australia, Jul'20, n=1,000 Australian regular wine drinkers

PACKAGING PURCHASE

Purchase of alternative packaging formats for wine has remained broadly stable in the Australian market; despite increasing awareness of wine cans, this has not yet translated into purchase behaviour

Packaging purchase: Tracking

% who have purchased each packaging type in the past 6 months
Base = All Australian regular wine drinkers (n=1,000)

Rank 2020		2017	2020	Tracking vs. '17
	n=	*1,000*	*1,000*	
1	Standard glass bottle (750 ml)	81%	78%	➡
2	Large cask (4 or 5L)	17%	15%	➡
3	Large bottle / magnum (1.5L)	12%	12%	➡
4	Small cask (2 or 3L)	12%	11%	➡
5	Half bottle (375ml)	9%	11%	➡
6	Small bottle (single serve)	11%	7%	⬇
7	Wine in a can	2%	4%	➡

WHAT DO MARKET EXPERTS SAY?

"The US was at the forefront of the wine in a can category and we jumped on that really early and tried to pioneer it here. Over the past two years, it seems to be growing steadily but it is not setting the world on fire. I think it will continue to be a slow burn"

Category Manager, National Retailer, Australia

Wine Intelligence Trade Interview Programme 2020
⬆ / ⬇ : Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac® Australia, Oct'17 and Jul'20, n=1,000 Australian regular wine drinkers

PACKAGING PURCHASE

Despite younger drinkers having generally lower awareness levels of wine packaging formats, they are more likely to purchase these other packaging types compared with other wine drinkers, particularly 1.5L and 375ml glass bottles

Packaging purchase: By gender & age groups

% who have purchased each packaging type in the past 6 months
Base = All Australian regular wine drinkers (n=1,000)

			Gender		Age groups			
Rank 2020		Australian regular wine drinkers	Male	Female	18-24 [Gen Z]	25-39 [Millennials]	40-54 [Gen X]	55+ [Boomers]
	n=	*1,000*	*536*	*464*	*90*	*288*	*272*	*350*
1	Standard glass bottle (750 ml)	78%	78%	79%	56%	70%	84%	87%
2	Large cask (4 or 5L)	15%	15%	16%	21%	10%	16%	18%
3	Large bottle / magnum (1.5L)	12%	12%	11%	24%	16%	10%	5%
4	Small cask (2 or 3L)	11%	13%	9%	13%	11%	11%	12%
5	Half bottle (375ml)	11%	15%	7%	22%	20%	8%	4%
6	Small bottle (single serve)	7%	7%	8%	10%	10%	7%	4%
7	Wine in a can	4%	4%	3%	6%	7%	3%	1%

Red / Blue: Statistically significantly higher / lower than all Australian regular wine drinkers at a 95% confidence level
Source: Wine Intelligence, Vinitrac® Australia, Jul'20, n=1,000 Australian regular wine drinkers

PACKAGING PURCHASE

Despite generally lower awareness levels amongst the youngest group Social Newbies of packaging formats for wine, they are more likely to purchase them compared with other drinkers, owing to their experimental nature

Packaging purchase: By Portraits

% who have purchased each packaging type in the past 6 months
Base = All Australian regular wine drinkers (n=1,000)

Rank 2020	n=	Australian regular wine drinkers	Portraits: Engaged Explorers	Social Newbies	Mainstream Matures	Contented Treaters	Senior Bargain Hunters	Kitchen Casuals
		1,000	*93*	*162*	*168*	*139*	*208*	*231*
1	Standard glass bottle (750 ml)	78%	73%	57%	94%	86%	81%	76%
2	Large cask (4 or 5L)	15%	10%	16%	18%	12%	18%	15%
3	Large bottle / magnum (1.5L)	12%	27%	23%	5%	12%	4%	8%
4	Small cask (2 or 3L)	11%	9%	12%	15%	11%	10%	11%
5	Half bottle (375ml)	11%	21%	29%	7%	11%	4%	6%
6	Small bottle (single serve)	7%	11%	12%	7%	7%	4%	6%
7	Wine in a can	4%	3%	9%	2%	5%	1%	1%

Red / Blue: Statistically significantly higher / lower than all Australian regular wine drinkers at a 95% confidence level
Source: Wine Intelligence, Vinitrac® Australia, Jul'20, n=1,000 Australian regular wine drinkers

PACKAGING PURCHASE

Australian consumers with high involvement in the wine category are more likely to purchase wine in 1.5L and 375ml glass bottles compared with other drinkers in Australia

Packaging purchase: By wine involvement

% who have purchased each packaging type in the past 6 months
Base = All Australian regular wine drinkers (n=1,000)

Rank 2020		Australian regular wine drinkers	Wine involvement: Low involvement	Medium involvement	High involvement
	n=	*1,000*	*279*	*403*	*318*
1	Standard glass bottle (750 ml)	78%	72%	81%	81%
2	Large cask (4 or 5L)	15%	16%	16%	14%
3	Large bottle / magnum (1.5L)	12%	6%	11%	16%
4	Small cask (2 or 3L)	11%	9%	11%	14%
5	Half bottle (375ml)	11%	7%	10%	16%
6	Small bottle (single serve)	7%	5%	7%	10%
7	Wine in a can	4%	2%	3%	5%

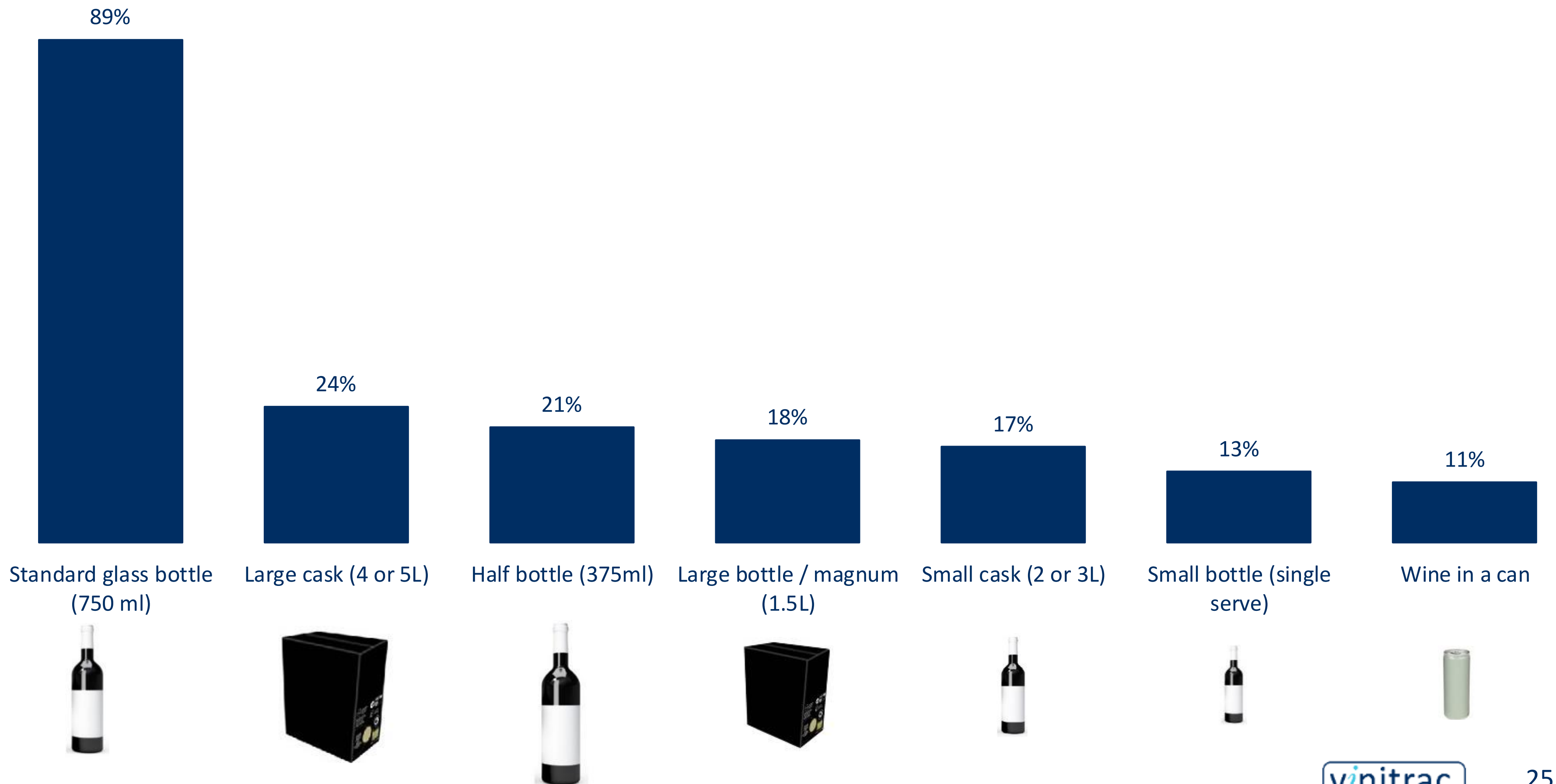
Red / Blue: Statistically significantly higher / lower than all Australian regular wine drinkers at a 95% confidence level
Source: Wine Intelligence, Vinitrac® Australia, Jul'20, n=1,000 Australian regular wine drinkers

PACKAGING CONVERSION

Standard glass bottles (750ml) outperform all other packaging types in terms of converting those aware of each format into purchasers

Packaging conversion

% who have purchased each packaging type in the past 6 months
Base = All Australian regular wine drinkers who are aware of the following packaging formats for wine



Source: Wine Intelligence, Vinitrac® Australia, Jul'20, n=1,000 Australian regular wine drinkers

PACKAGING CONVERSION

The conversion to purchase rate amongst those aware of wine in both small bottles and cans has declined over the past few years, meaning that growing awareness is not currently translating across to purchase at the same rate

Packaging conversion: Tracking

% who have purchased each packaging type in the past 6 months
Base = All Australian regular wine drinkers who are aware of the following packaging formats for wine

Rank 2020	*n=*	2017 *1,000*	2020 *1,000*	Tracking vs. '17
1	Standard glass bottle (750 ml)	93%	89%	
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3	Half bottle (375ml)	18%	21%	
4	Large bottle / magnum (1.5L)	20%	18%	
5	Small cask (2 or 3L)	19%	17%	
6	Small bottle (single serve)	20%	13%	
7	Wine in a can	20%	11%	

/ : Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac® Australia, Oct'17 and Jul'20, n=1,000 Australian regular wine drinkers

PACKAGING CONVERSION

Younger consumers in Australia are significantly more likely than others to purchase alternative packaging types for wine once they become aware of these alternatives

Packaging conversion: By gender & age groups

% who have purchased each packaging type in the past 6 months
Base = All Australian regular wine drinkers who are aware of the following packaging formats for wine

			Gender		Age groups			
Rank 2020		Australian regular wine drinkers	Male	Female	18-24 [Gen Z]	25-39 [Millennials]	40-54 [Gen X]	55+ [Boomers]
	n=	*1,000*	*536*	*464*	*90*	*288*	*272*	*350*
1	Standard glass bottle (750 ml)	89%	89%	89%	74%	88%	93%	91%
2	Large cask (4 or 5L)	24%	24%	25%	51%	23%	23%	22%
3	Half bottle (375ml)	21%	26%	14%	40%	42%	15%	6%
4	Large bottle / magnum (1.5L)	18%	19%	17%	44%	29%	17%	7%
5	Small cask (2 or 3L)	17%	21%	13%	31%	23%	14%	14%
6	Small bottle (single serve)	13%	13%	13%	26%	22%	11%	6%
7	Wine in a can	11%	13%	9%	25%	20%	7%	4%

WHAT DO MARKET EXPERTS SAY?

"Cans are driven by the under 30s. They are more open minded about wine and having different occasions that they're buying it for"

Marketing Manager, Producer, Australia

Wine Intelligence Trade Interview Programme 2020
: sample size < 50
Red / Blue: Statistically significantly higher / lower than all Australian regular wine drinkers at a 95% confidence level
Source: Wine Intelligence, Vinitrac® Australia, Jul'20, n=1,000 Australian regular wine drinkers

PACKAGING CONVERSION

The youngest segment, Social Newbies, are more likely to have purchased alternative packaging formats compared with other Australian wine drinkers, reflecting their open-minded approach to the wine category

Packaging conversion: By Portraits

% who have purchased each packaging type in the past 6 months
Base = All Australian regular wine drinkers who are aware of the following packaging formats for wine

			Portraits					
Rank 2020	*n=*	Australian regular wine drinkers	Engaged Explorers	Social Newbies	Mainstream Matures	Contented Treaters	Senior Bargain Hunters	Kitchen Casuals
		1,000	*93*	*162*	*168*	*139*	*208*	*231*
1	Standard glass bottle (750 ml)	89%	91%	80%	99%	96%	86%	86%
2	Large cask (4 or 5L)	24%	21%	39%	23%	18%	25%	23%
3	Half bottle (375ml)	21%	39%	56%	10%	19%	7%	12%
4	Large bottle / magnum (1.5L)	18%	45%	42%	7%	17%	7%	15%
5	Small cask (2 or 3L)	17%	19%	30%	18%	15%	12%	16%
6	Small bottle (single serve)	13%	22%	30%	9%	13%	5%	12%
7	Wine in a can	11%	12%	36%	5%	14%	4%	5%

: sample size < 50
Red / Blue: Statistically significantly higher / lower than all Australian regular wine drinkers at a 95% confidence level
Source: Wine Intelligence, Vinitrac® Australia, Jul'20, n=1,000 Australian regular wine drinkers

PACKAGING CONVERSION

Australian consumers with high involvement in the wine category are more likely to purchase wine in half bottles compared with other drinkers once they are aware of this format

Packaging conversion: By wine involvement

% who have purchased each packaging type in the past 6 months
Base = All Australian regular wine drinkers who are aware of the following packaging formats for wine

Rank 2020		Australian regular wine drinkers	Wine involvement: Low involvement	Medium involvement	High involvement
	n=	*1,000*	*279*	*403*	*318*
1	Standard glass bottle (750 ml)	89%	82%	91%	93%
2	Large cask (4 or 5L)	24%	24%	25%	23%
3	Half bottle (375ml)	21%	15%	18%	29%
4	Large bottle / magnum (1.5L)	18%	11%	18%	24%
5	Small cask (2 or 3L)	17%	14%	16%	21%
6	Small bottle (single serve)	13%	9%	12%	17%
7	Wine in a can	11%	9%	10%	13%

WHAT DO MARKET EXPERTS SAY?

"What we've seen coming up in the last six months is brands that only play in that half bottle space. I think we'll see more of that because getting the economies of scale for a 375ml bottle is much harder"

Marketing Manager, Producer, Australia

"There is lots of talk about whether half bottles are going to come back in, or if it will just be a mix of small versus the standard 750ml bottles"

Marketing Manager, Producer, Australia

Wine Intelligence Trade Interview Programme 2020
Red / Blue: Statistically significantly higher / lower than all Australian regular wine drinkers at a 95% confidence level
Source: Wine Intelligence, Vinitrac® Australia, Jul'20, n=1,000 Australian regular wine drinkers

PACKAGING CONSIDERATION

Although standard glass bottles outperform other packaging types, Australian consumers have similar consideration levels for all other packaging formats

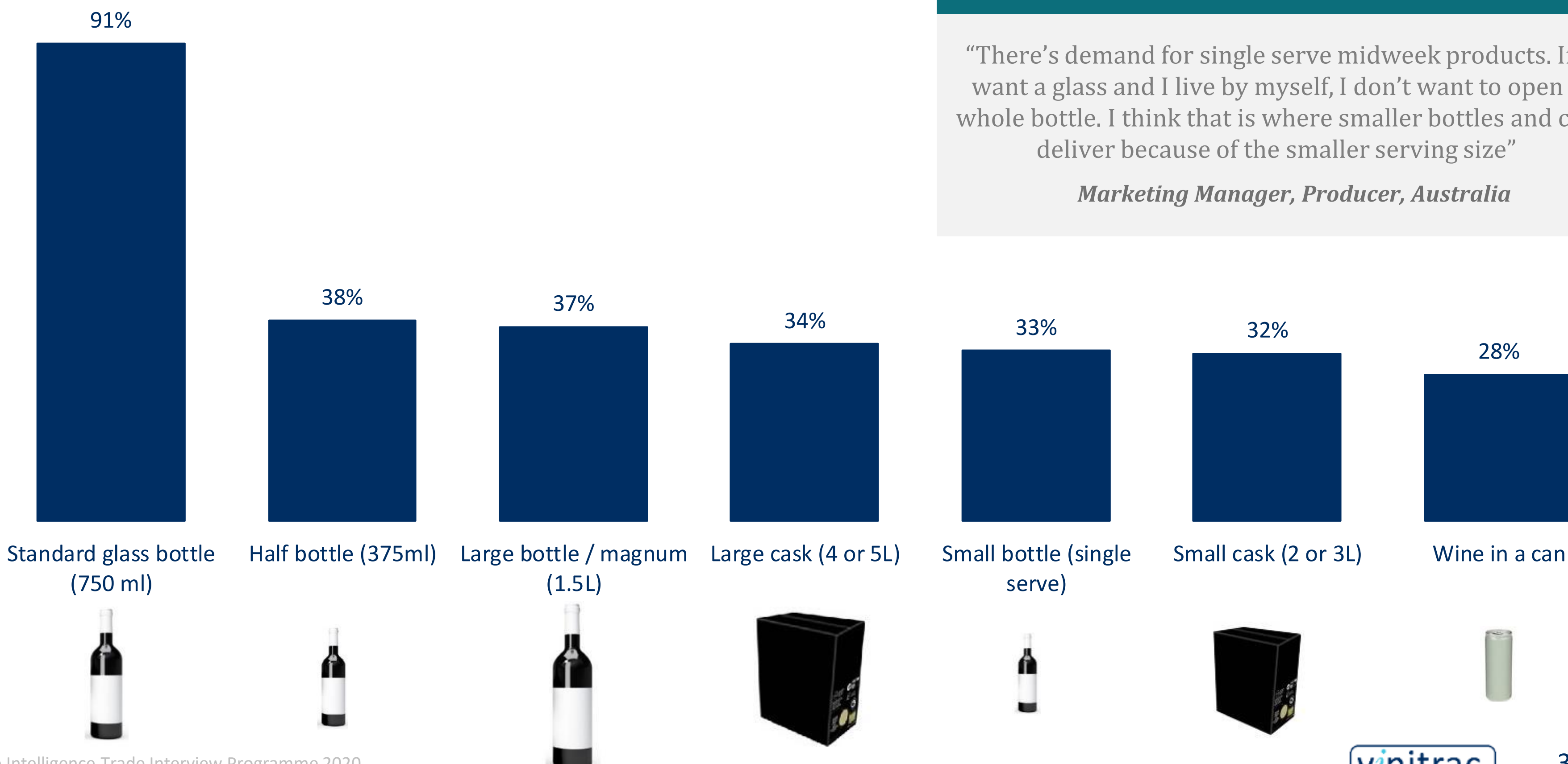
Packaging consideration

% who would consider buying wine in the following types of packaging formats
Base = All Australian regular wine drinkers who are aware of the following packaging formats for wine

WHAT DO MARKET EXPERTS SAY?

"There's demand for single serve midweek products. If I want a glass and I live by myself, I don't want to open a whole bottle. I think that is where smaller bottles and can deliver because of the smaller serving size"

Marketing Manager, Producer, Australia



PACKAGING CONSIDERATION

Stable consideration rates of packaging formats since 2017

Packaging consideration: Tracking

% who would consider buying wine in the following types of packaging formats
Base = All Australian regular wine drinkers who are aware of the following packaging formats for wine

Rank 2020	*n=*	2017 *1,000*	2020 *1,000*	Tracking vs. '17
1	Standard glass bottle (750 ml)	93%	91%	➡
2	Half bottle (375ml)	41%	38%	➡
3	Large bottle / magnum (1.5L)	40%	37%	➡
4	Large cask (4 or 5L)	33%	34%	➡
5	Small bottle (single serve)	33%	33%	➡
6	Small cask (2 or 3L)	33%	32%	➡
7	Wine in a can	25%	28%	➡

⬆ / ⬇ : Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac® Australia, Oct'17 and Jul'20, n=1,000 Australian regular wine drinkers

PACKAGING CONSIDERATION

In line with purchase patterns, Millennials are more likely to consider purchasing a variety of packaging types compared with other wine drinkers whilst Gen Z drinkers lead in future consideration for both magnums and small casks

Packaging consideration: By gender & age groups

% who would consider buying wine in the following types of packaging formats
Base = All Australian regular wine drinkers who are aware of the following packaging formats for wine

			Gender		Age groups			
Rank 2020		Australian regular wine drinkers	Male	Female	18-24 [Gen Z]	25-39 [Millennials]	40-54 [Gen X]	55+ [Boomers]
	n=	*1,000*	*536*	*464*	*90*	*288*	*272*	*350*
1	Standard glass bottle (750 ml)	91%	90%	93%	75%	88%	95%	94%
2	Half bottle (375ml)	38%	41%	35%	55%	53%	41%	23%
3	Large bottle / magnum (1.5L)	37%	37%	38%	62%	55%	37%	21%
4	Large cask (4 or 5L)	34%	35%	33%	42%	45%	37%	26%
5	Small bottle (single serve)	33%	28%	37%	35%	48%	36%	21%
6	Small cask (2 or 3L)	32%	34%	30%	53%	37%	35%	25%
7	Wine in a can	28%	23%	32%	39%	45%	25%	13%

: sample size < 50
Red / Blue: Statistically significantly higher / lower than all Australian regular wine drinkers at a 95% confidence level
Source: Wine Intelligence, Vinitrac® Australia, Jul'20, n=1,000 Australian regular wine drinkers

PACKAGING CONSIDERATION

In line with purchase rates, Social Newbies are more likely to consider purchasing a variety of packaging types compared with other Australian drinkers

Packaging consideration: By Portraits

% who would consider buying wine in the following types of packaging formats
Base = All Australian regular wine drinkers who are aware of the following packaging formats for wine

			Portraits					
Rank 2020	n=	Australian regular wine drinkers	Engaged Explorers	Social Newbies	Mainstream Matures	Contented Treaters	Senior Bargain Hunters	Kitchen Casuals
		1,000	*93*	*162*	*168*	*139*	*208*	*231*
1	Standard glass bottle (750 ml)	91%	93%	79%	98%	94%	92%	90%
2	Half bottle (375ml)	38%	48%	57%	35%	48%	27%	28%
3	Large bottle / magnum (1.5L)	37%	63%	54%	35%	37%	23%	32%
4	Large cask (4 or 5L)	34%	29%	48%	34%	26%	34%	34%
5	Small bottle (single serve)	33%	39%	42%	33%	34%	27%	31%
6	Small cask (2 or 3L)	32%	28%	39%	33%	29%	25%	39%
7	Wine in a can	28%	40%	39%	22%	28%	30%	21%

: sample size < 50
Red / Blue: Statistically significantly higher / lower than all Australian regular wine drinkers at a 95% confidence level
Source: Wine Intelligence, Vinitrac® Australia, Jul'20, n=1,000 Australian regular wine drinkers

PACKAGING CONSIDERATION

Reflecting their purchasing behaviour, higher involved consumers are more likely to consider purchasing large bottles / magnums (1.5L) in the future

Packaging consideration: By wine involvement

% who would consider buying wine in the following types of packaging formats
Base = All Australian regular wine drinkers who are aware of the following packaging formats for wine

Rank 2020		Australian regular wine drinkers	Wine involvement: Low involvement	Medium involvement	High involvement
	n=	*1,000*	*279*	*403*	*318*
1	Standard glass bottle (750 ml)	91%	90%	92%	92%
2	Half bottle (375ml)	38%	33%	38%	43%
3	Large bottle / magnum (1.5L)	37%	26%	36%	47%
4	Large cask (4 or 5L)	34%	34%	33%	36%
5	Small bottle (single serve)	33%	26%	33%	37%
6	Small cask (2 or 3L)	32%	31%	32%	34%
7	Wine in a can	28%	27%	28%	29%

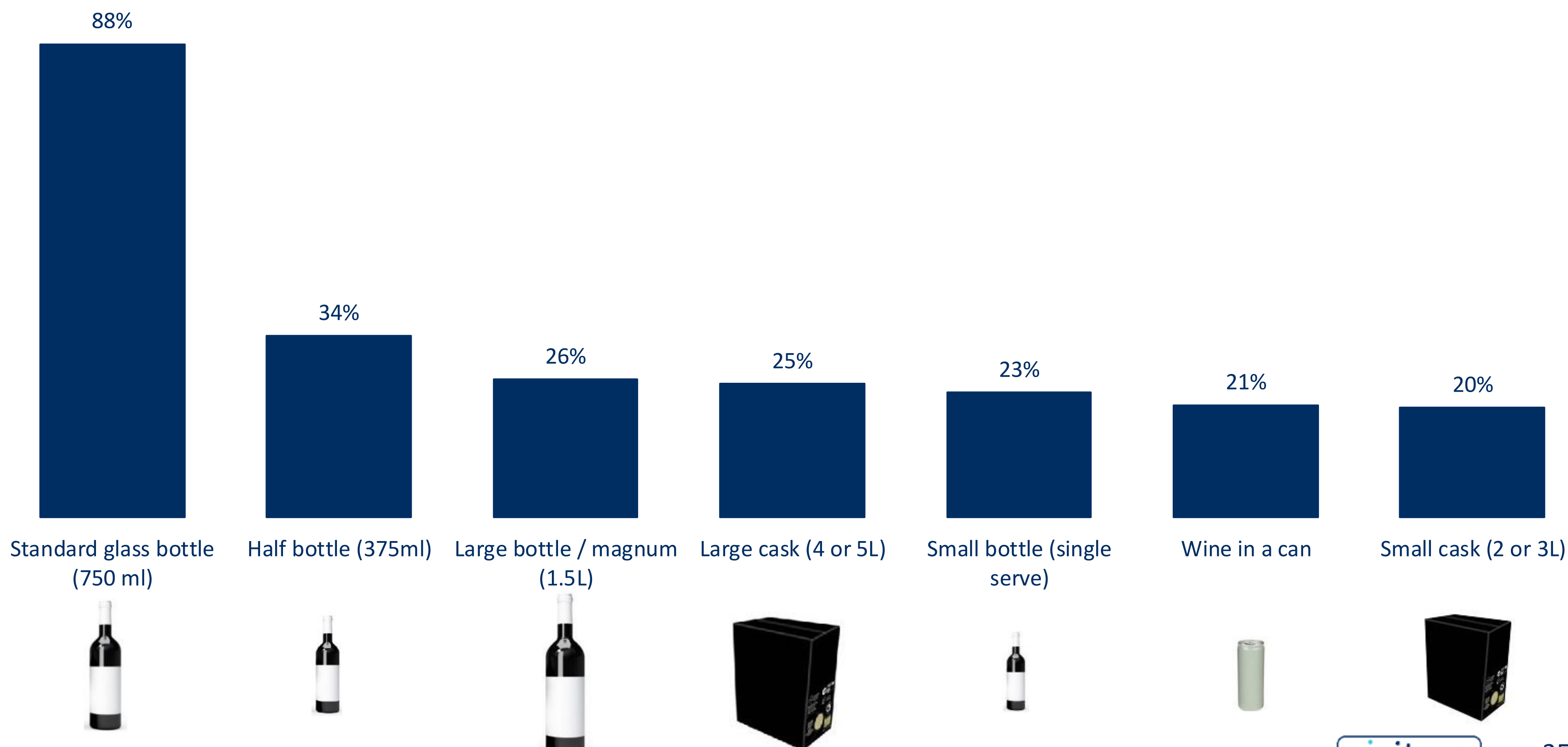
Red / Blue: Statistically significantly higher / lower than all Australian regular wine drinkers at a 95% confidence level
Source: Wine Intelligence, Vinitrac® Australia, Jul’20, n=1,000 Australian regular wine drinkers

PACKAGING AFFINITY

Glass format bottles continue to outperform alternative formats in terms of consumer affinity

Packaging affinity

% who would consider buying wine in the following types of packaging formats
Base = All Australian regular wine drinkers who are aware of the following packaging formats for wine



Source: Wine Intelligence, Vinitrac® Australia, Jul'20, n=1,000 Australian regular wine drinkers

PACKAGING AFFINITY

Stable affinity rates of packaging formats since 2017, with glass bottles of various sizes positioned well amongst Australian regular wine drinkers

Packaging affinity: Tracking

% who would consider buying wine in the following types of packaging formats
Base = All Australian regular wine drinkers who are aware of the following packaging formats for wine

Rank 2020	n=	2017 *1,000*	2020 *1,000*	Tracking vs. '17
1	Standard glass bottle (750 ml)	90%	88%	➡
2	Half bottle (375ml)	34%	34%	➡
3	Large bottle / magnum (1.5L)	30%	26%	➡
4	Large cask (4 or 5L)	25%	25%	➡
5	Small bottle (single serve)	25%	23%	➡
6	Wine in a can	18%	21%	➡
7	Small cask (2 or 3L)	24%	20%	➡

🡅 / 🡇 : Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac® Australia, Oct'17 and Jul'20, n=1,000 Australian regular wine drinkers

PACKAGING AFFINITY

Gen Z and Millennial drinkers in Australia are more likely to feel affinity for a range of alternative packaging formats compared with other Australian drinkers

Packaging affinity: By gender & age groups

% who would consider buying wine in the following types of packaging formats
Base = All Australian regular wine drinkers who are aware of the following packaging formats for wine

			Gender		Age groups			
Rank 2020		Australian regular wine drinkers	Male	Female	18-24 [Gen Z]	25-39 [Millennials]	40-54 [Gen X]	55+ [Boomers]
	n=	*1,000*	*536*	*464*	*90*	*288*	*272*	*350*
1	Standard glass bottle (750 ml)	88%	87%	88%	66%	84%	91%	92%
2	Half bottle (375ml)	34%	36%	30%	44%	52%	34%	20%
3	Large bottle / magnum (1.5L)	26%	26%	25%	42%	34%	30%	14%
4	Large cask (4 or 5L)	25%	26%	23%	45%	24%	25%	22%
5	Small bottle (single serve)	23%	19%	27%	35%	31%	23%	16%
6	Wine in a can	21%	20%	21%	40%	35%	17%	7%
7	Small cask (2 or 3L)	20%	22%	19%	34%	24%	22%	16%

: sample size < 50
Red / Blue: Statistically significantly higher / lower than all Australian regular wine drinkers at a 95% confidence level
Source: Wine Intelligence, Vinitrac® Australia, Jul'20, n=1,000 Australian regular wine drinkers

PACKAGING AFFINITY

The youngest segment Social Newbies are significantly more likely to feel affinity for a majority of alternative wine packaging types compared with other drinkers

wine intelligence

Packaging affinity: By Portraits

% who would consider buying wine in the following types of packaging formats
Base = All Australian regular wine drinkers who are aware of the following packaging formats for wine

			Portraits					
Rank 2020		Australian regular wine drinkers	Engaged Explorers	Social Newbies	Mainstream Matures	Contented Treaters	Senior Bargain Hunters	Kitchen Casuals
	n=	*1,000*	*93*	*162*	*168*	*139*	*208*	*231*
1	Standard glass bottle (750 ml)	88%	86%	77%	97%	91%	87%	86%
2	Half bottle (375ml)	34%	50%	53%	30%	42%	18%	26%
3	Large bottle / magnum (1.5L)	26%	43%	45%	20%	24%	17%	21%
4	Large cask (4 or 5L)	25%	16%	39%	21%	16%	28%	27%
5	Small bottle (single serve)	23%	28%	36%	20%	24%	19%	22%
6	Wine in a can	21%	33%	43%	12%	18%	20%	15%
7	Small cask (2 or 3L)	20%	19%	27%	18%	17%	16%	26%

: sample size < 50
Red / Blue: Statistically significantly higher / lower than all Australian regular wine drinkers at a 95% confidence level
Source: Wine Intelligence, Vinitrac® Australia, Jul'20, n=1,000 Australian regular wine drinkers

PACKAGING AFFINITY

Higher involved consumers have more affinity towards large bottles / magnums (1.5L) compared with other Australian regular wine drinkers

Packaging affinity: By wine involvement

% who would consider buying wine in the following types of packaging formats
Base = All Australian regular wine drinkers who are aware of the following packaging formats for wine

Rank 2020		Australian regular wine drinkers	Wine involvement: Low involvement	Medium involvement	High involvement
	n=	*1,000*	*279*	*403*	*318*
1	Standard glass bottle (750 ml)	88%	83%	88%	91%
2	Half bottle (375ml)	34%	26%	33%	41%
3	Large bottle / magnum (1.5L)	26%	17%	25%	33%
4	Large cask (4 or 5L)	25%	28%	24%	23%
5	Small bottle (single serve)	23%	17%	26%	25%
6	Wine in a can	21%	19%	20%	23%
7	Small cask (2 or 3L)	20%	19%	22%	19%

Red / Blue: Statistically significantly higher / lower than all Australian regular wine drinkers at a 95% confidence level
Source: Wine Intelligence, Vinitrac® Australia, Jul'20, n=1,000 Australian regular wine drinkers

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DRIVERS OF PACKAGING FORMAT PURCHASE

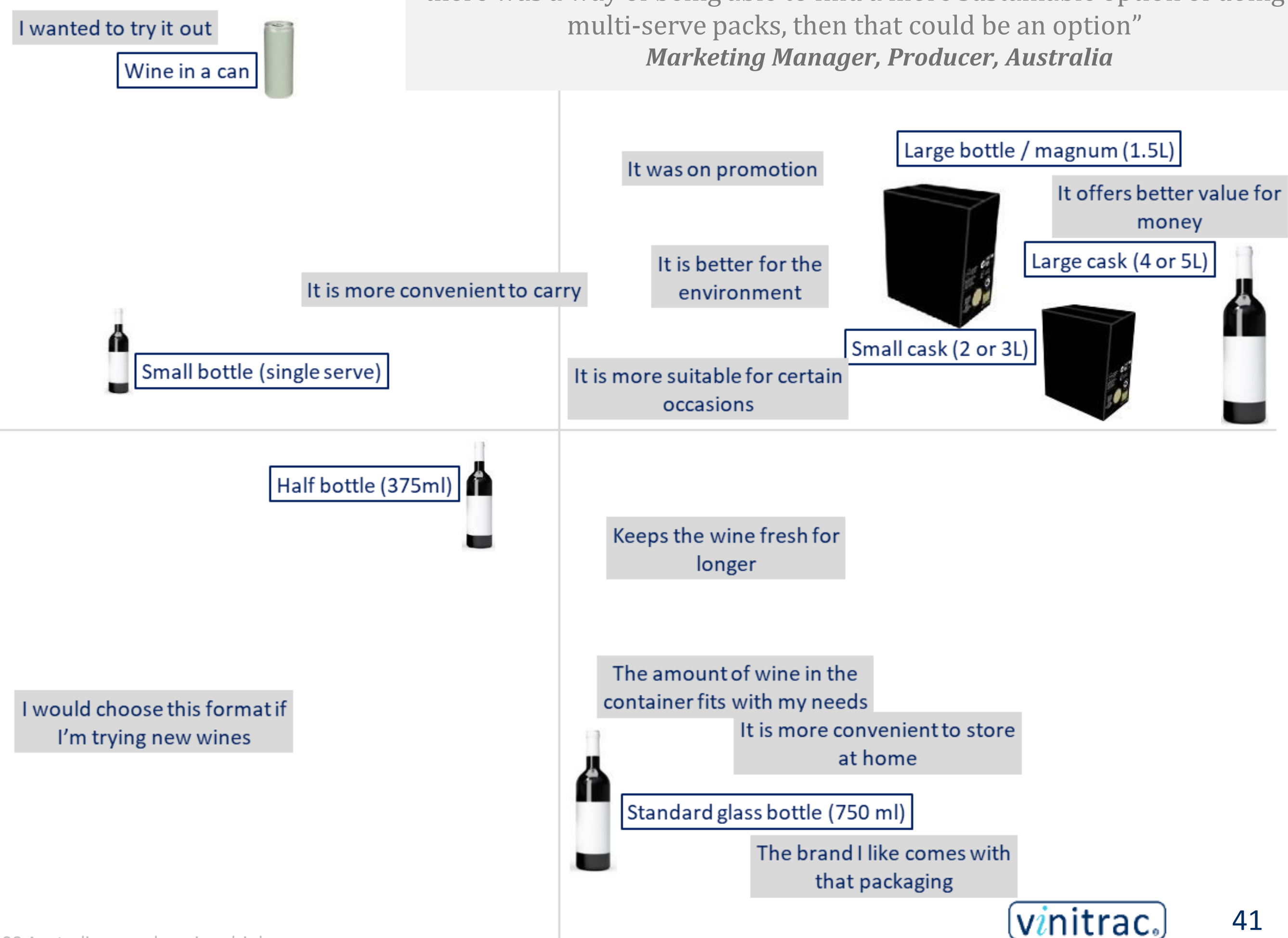
Casks and large bottles / magnums (1.5L) are seen as delivering better value for money and are associated with a positive environmental benefit whereas cans are more associated with trial due to it being a lesser know format

WHAT DO MARKET EXPERTS SAY?

"Casks are seen as sustainable and there is something big in sustainable packaging that we still need to crack from a market point of view. If there was a way of being able to find a more sustainable option of doing multi-serve packs, then that could be an option"

Marketing Manager, Producer, Australia

Drivers of packaging format purchase: Imagery perception map



The positioning map is a graphical representation of the association between packaging formats and statements. The strength of the association is measure by how far the packaging format and the statement are from the centre

Base = All Australian regular wine drinkers who are aware of the following packaging formats for wine

Wine Intelligence Trade Interview Programme 2020

Source: Wine Intelligence, Vinitrac® Australia, Jul'20, n=1,000 Australian regular wine drinkers

REASONS FOR ALTERNATIVE PACKAGING FORMAT PURCHASE

Standard bottles are seen as appropriate for consumer needs significantly more than other options

Reasons for alternative packaging format purchase

% who consider the following reasons to purchase wine in the following packaging formats
Base = All Australian regular wine drinkers who are aware of the following packaging formats for wine

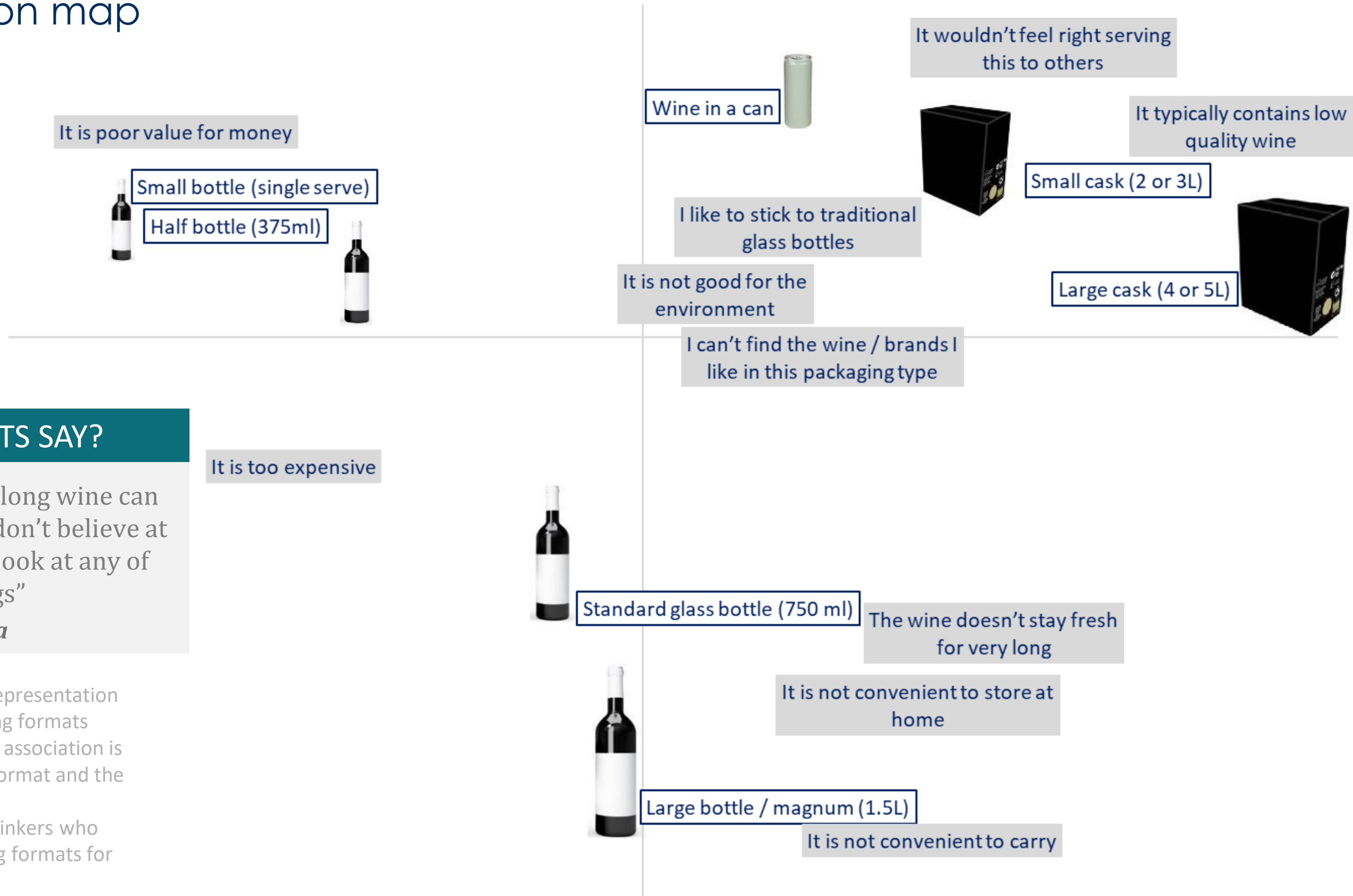
	Standard glass bottle (750 ml)	Large cask (4 or 5L)	Large bottle / magnum (1.5L)	Small cask (2 or 3L)	Small bottle (single serve)	Half bottle (375ml)	Wine in a can
It offers better value for money	28%	30%	25%	21%	7%	8%	5%
It is more suitable for certain occasions	33%	13%	20%	12%	17%	16%	12%
The amount of wine in the container fits with my needs	40%	15%	13%	13%	15%	18%	9%
It was on promotion	27%	16%	20%	15%	15%	14%	15%
It is more convenient to carry	25%	11%	7%	15%	16%	16%	19%
It is more convenient to store at home	35%	15%	8%	16%	10%	11%	8%
I wanted to try it out	16%	6%	9%	7%	19%	17%	20%
The brand I like comes with that packaging	37%	10%	12%	9%	6%	10%	7%
I would choose this format if I'm trying new wines	25%	3%	5%	4%	19%	16%	9%
It is better for the environment	18%	11%	11%	10%	8%	10%	9%
Keeps the wine fresh for longer	21%	10%	7%	11%	11%	11%	5%
I don't know	6%	13%	16%	16%	16%	14%	14%

Orange / red: Statistically significantly higher than 5 / 6 packaging types in the competitive set at a 95% confidence level
Source: Wine Intelligence, Vinitrac® Australia, Jul'20, n=1,000 Australian regular wine drinkers

BARRIERS TO PACKAGING FORMAT PURCHASE

Casks are seen as offering low quality wine, whilst smaller glass bottles are perceived as delivering comparatively poor value for money

Barriers to packaging format purchase: Imagery perception map



WHAT DO MARKET EXPERTS SAY?

"There are issues around how long wine can stay in both plastic and cans. I don't believe at this point in time we need to look at any of these sorts of things"

Producer, Australia

The positioning map is a graphical representation of the association between packaging formats and statements. The strength of the association is measure by how far the packaging format and the statement are from the centre

Base = All Australian regular wine drinkers who are aware of the following packaging formats for wine

Wine Intelligence Trade Interview Programme 2020

Source: Wine Intelligence, Vinitrac® Australia, Jul'20, n=1,000 Australian regular wine drinkers

BARRIERS FOR ALTERNATIVE PACKAGING FORMAT PURCHASE

The main barrier to purchasing alternative packaging formats is the underlying preference for standard glass bottles; with the perception that smaller format bottles are poorer value for money and magnums are not convenient to carry

Barriers for alternative packaging format purchase

% who consider the following reasons to be barriers to purchase the following packaging formats
Base = All Australian regular wine drinkers who are aware of the following packaging formats for wine

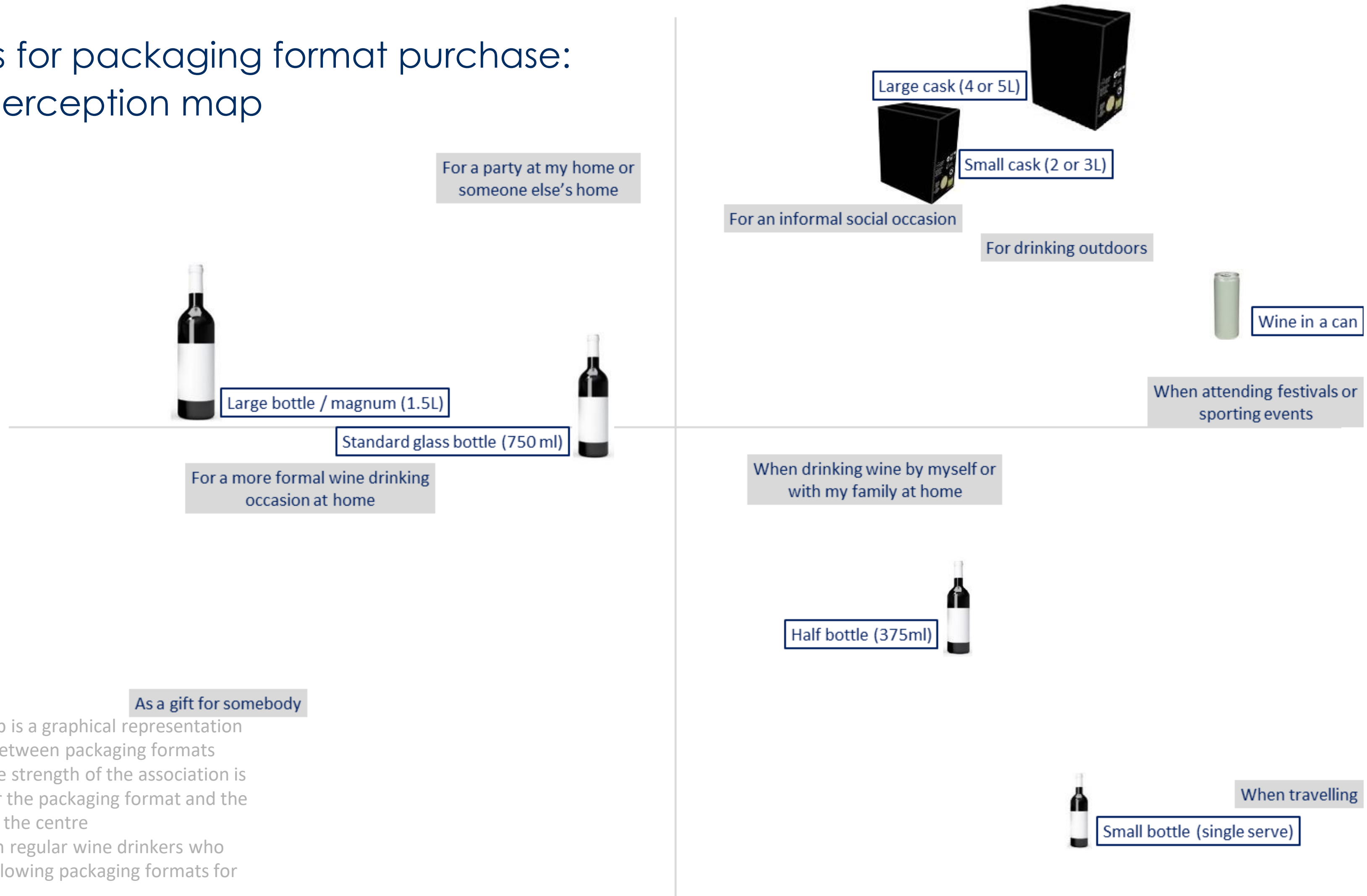
	Standard glass bottle (750 ml)	Large cask (4 or 5L)	Large bottle / magnum (1.5L)	Small cask (2 or 3L)	Small bottle (single serve)	Half bottle (375ml)	Wine in a can
I like to stick to traditional glass bottles	15%	27%	17%	24%	16%	17%	26%
It is poor value for money	13%	6%	7%	7%	32%	24%	20%
It is too expensive	17%	7%	21%	5%	21%	21%	16%
It typically contains low quality wine	10%	37%	5%	30%	4%	2%	17%
It wouldn't feel right serving this to others	3%	26%	7%	21%	9%	7%	27%
I can't find the wine / brands I like in this packaging type	9%	17%	13%	16%	9%	12%	14%
It is not convenient to carry	12%	15%	23%	8%	4%	3%	5%
It is not convenient to store at home	12%	14%	17%	8%	4%	4%	6%
The wine doesn't stay fresh for very long	14%	13%	13%	9%	3%	2%	7%
It is not good for the environment	10%	8%	4%	7%	7%	5%	12%
I don't know	15%	10%	12%	12%	12%	12%	10%

Orange / red: Statistically significantly higher than 5 / 6 packaging types in the competitive set at a 95% confidence level
Source: Wine Intelligence, Vinitrac® Australia, Jul'20, n=1,000 Australian regular wine drinkers

OCCASIONS FOR PACKAGING FORMAT PURCHASE

Clear distinction between wine packaging formats for different wine occasions, with casks showing salience for informal social occasions and cans strongly associated with outdoor events

Occasions for packaging format purchase: Imagery perception map



The positioning map is a graphical representation of the association between packaging formats and statements. The strength of the association is measure by how far the packaging format and the statement are from the centre
Base = All Australian regular wine drinkers who are aware of the following packaging formats for wine

Source: Wine Intelligence, Vinitrac® Australia, Jul'20, n=1,000 Australian regular wine drinkers

OCCASIONS FOR ALTERNATIVE PACKAGING FORMAT PURCHASE

Australian regular wine drinkers continue to be more inclined to purchase standard glass bottles for more formal and gift occasions, whereas cans are more suited for outdoor events

Occasions for alternative packaging format purchase

% who consider the following occasions for purchasing wine in the following packaging formats
Base = All Australian regular wine drinkers who are aware of the following packaging formats for wine

	Standard glass bottle (750 ml)	Large cask (4 or 5L)	Large bottle / magnum (1.5L)	Small cask (2 or 3L)	Small bottle (single serve)	Half bottle (375ml)	Wine in a can
When drinking wine by myself or with my family at home	57%	24%	18%	22%	25%	32%	15%
For a party at my home or someone else's home	49%	18%	30%	15%	8%	13%	12%
For an informal social occasion	44%	18%	16%	19%	11%	18%	17%
For drinking outdoors	33%	16%	11%	18%	15%	15%	24%
As a gift for somebody	57%	4%	30%	4%	11%	18%	4%
When travelling	18%	9%	6%	12%	26%	19%	20%
For a more formal wine drinking occasion at home	52%	6%	17%	5%	6%	11%	6%
When attending festivals or sporting events	16%	8%	7%	8%	12%	11%	23%
Don't know	5%	11%	10%	10%	10%	11%	9%

Orange / red: Statistically significantly higher than 5 / 6 packaging types in the competitive set at a 95% confidence level
Source: Wine Intelligence, Vinitrac® Australia, Jul'20, n=1,000 Australian regular wine drinkers

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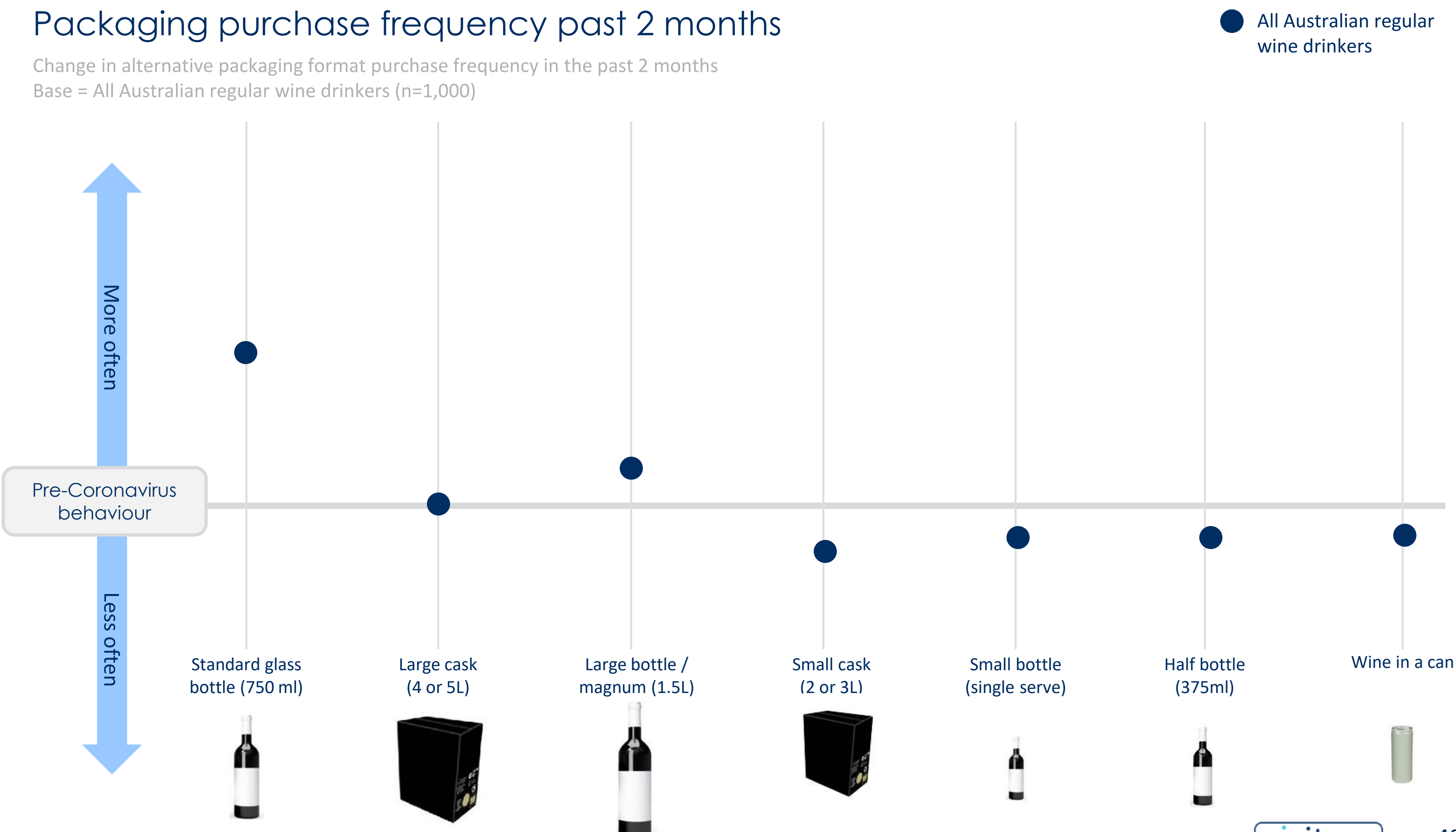
PURCHASE FREQUENCY CHANGE PAST 2 MONTHS – COVID-19 IMPACT

Most significant increase in purchase of standard glass bottles (750ml) during June and July 2020

Packaging purchase frequency past 2 months

Change in alternative packaging format purchase frequency in the past 2 months
Base = All Australian regular wine drinkers (n=1,000)



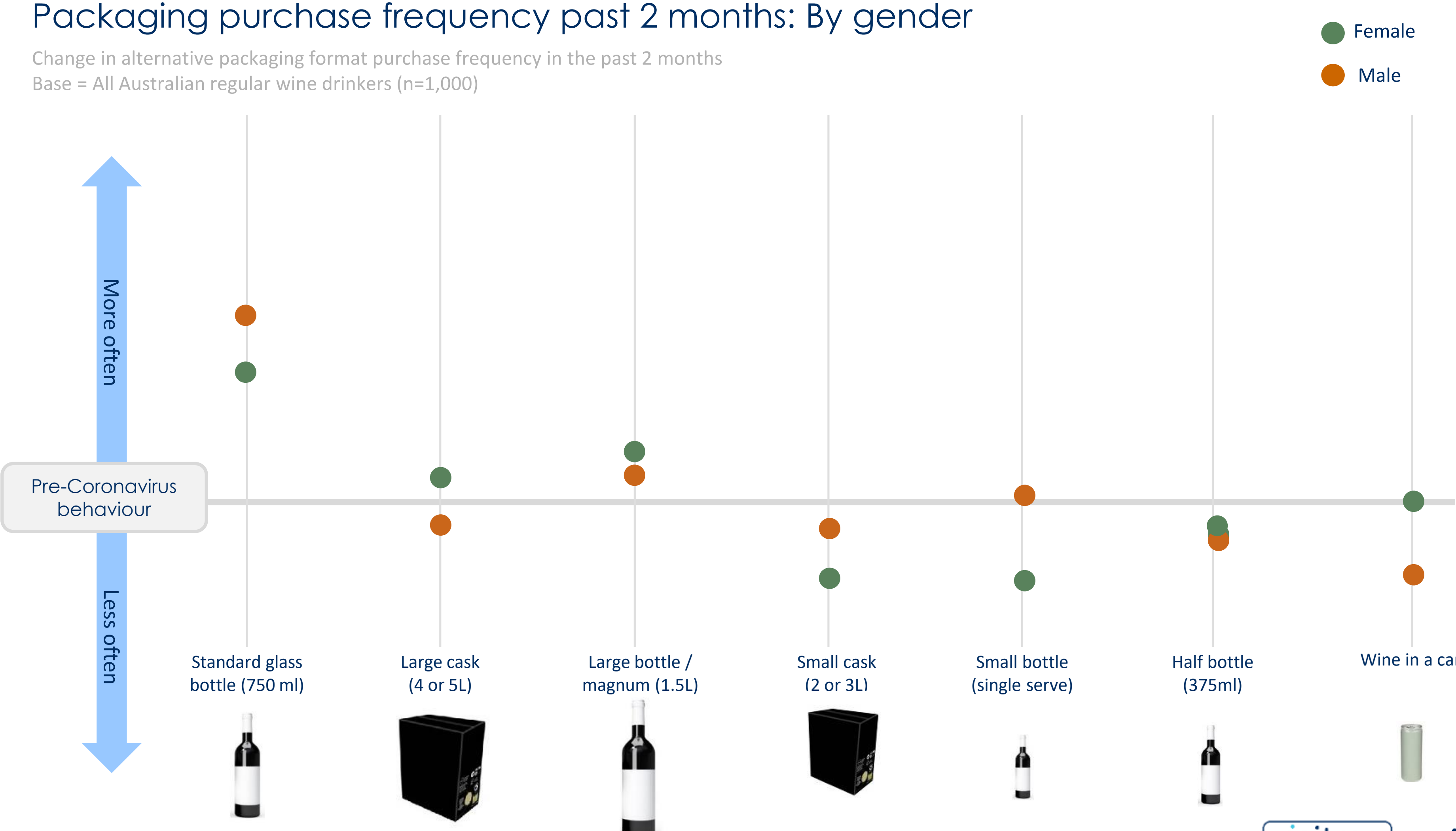
Source: Wine Intelligence, Vinitrac® Australia, Jul'20, n=1,000 Australian regular wine drinkers

PURCHASE FREQUENCY CHANGE PAST 2 MONTHS – COVID-19 IMPACT

Women were more likely to purchase larger formats than normal during June and July 2020

Packaging purchase frequency past 2 months: By gender

Change in alternative packaging format purchase frequency in the past 2 months
Base = All Australian regular wine drinkers (n=1,000)



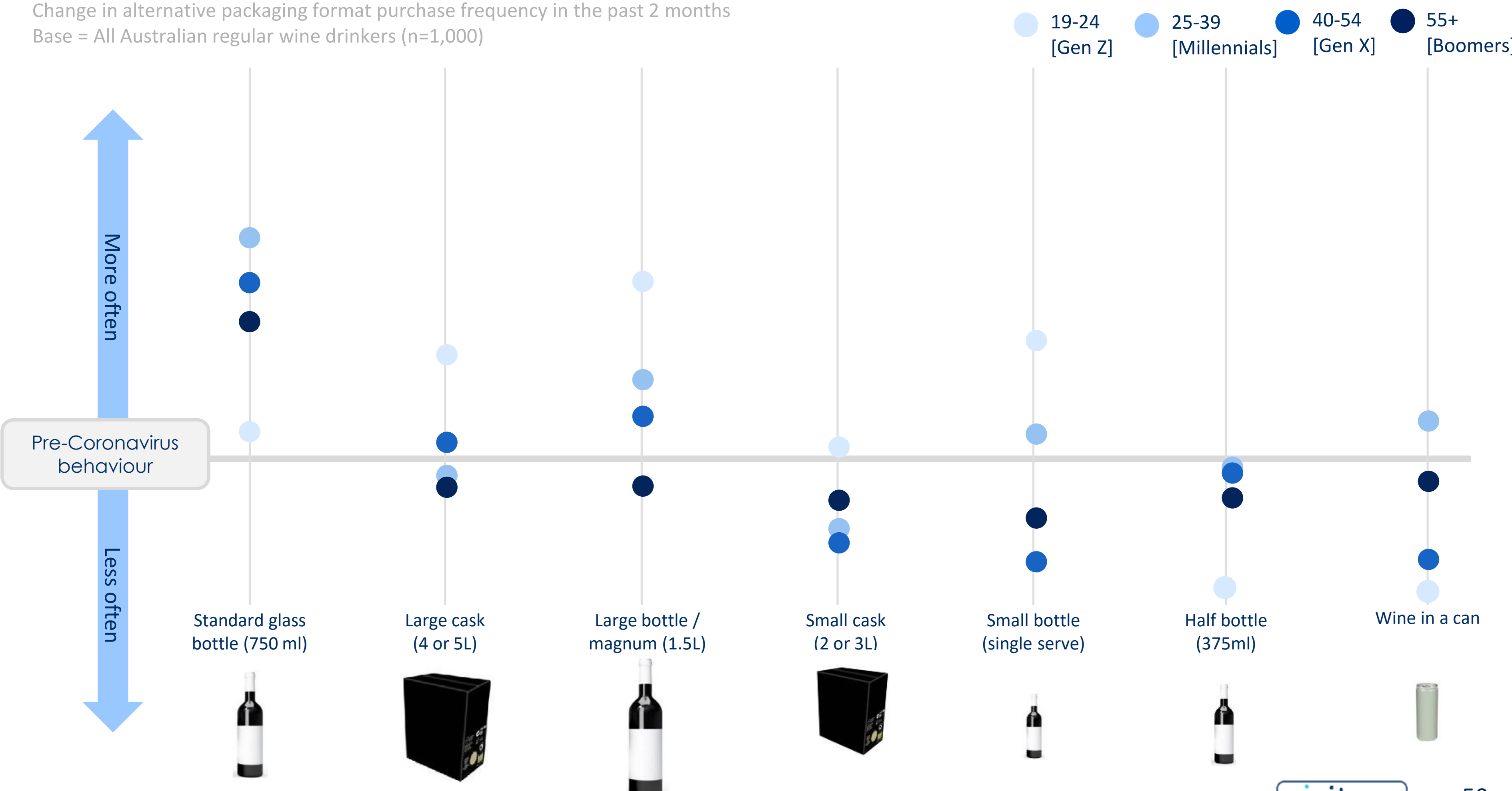
Source: Wine Intelligence, Vinitrac® Australia, Jul'20, n=1,000 Australian regular wine drinkers

PURCHASE FREQUENCY CHANGE PAST 2 MONTHS – COVID-19 IMPACT

Gen Z were increasingly likely to purchase larger formats (casks and bottles) during June and July 2020

Packaging purchase frequency past 2 months: By age groups

Change in alternative packaging format purchase frequency in the past 2 months
Base = All Australian regular wine drinkers (n=1,000)



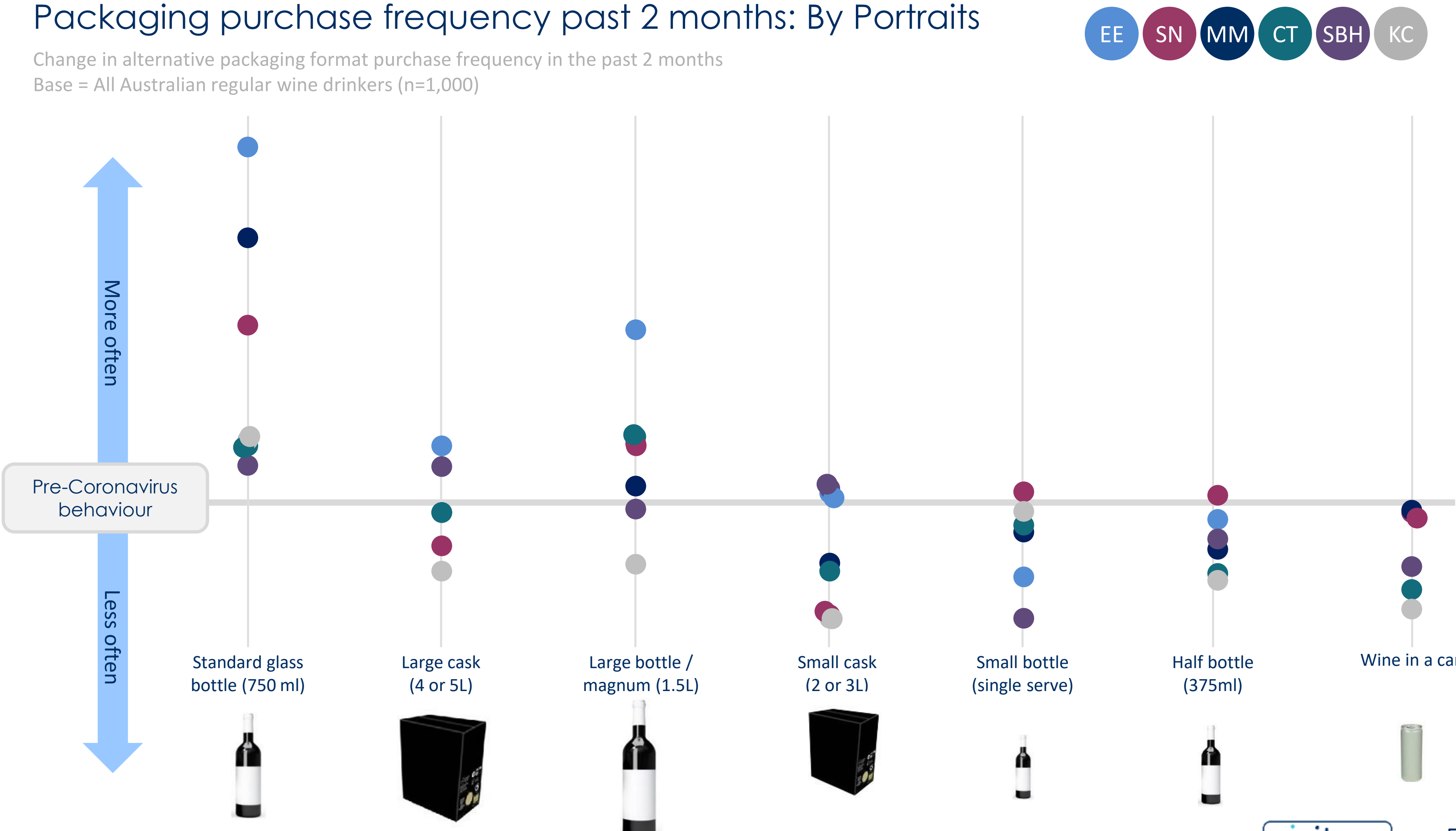
Source: Wine Intelligence, Vinitrac® Australia, Jul'20, n=1,000 Australian regular wine drinkers

PURCHASE FREQUENCY CHANGE PAST 2 MONTHS – COVID-19 IMPACT

Engaged Explorers, one of the younger segments with a strong interest in the category, were more likely than other drinkers to purchase large bottles / magnums (1.5L) during June and July 2020

Packaging purchase frequency past 2 months: By Portraits

Change in alternative packaging format purchase frequency in the past 2 months
Base = All Australian regular wine drinkers (n=1,000)



Source: Wine Intelligence, Vinitrac® Australia, Jul'20, n=1,000 Australian regular wine drinkers

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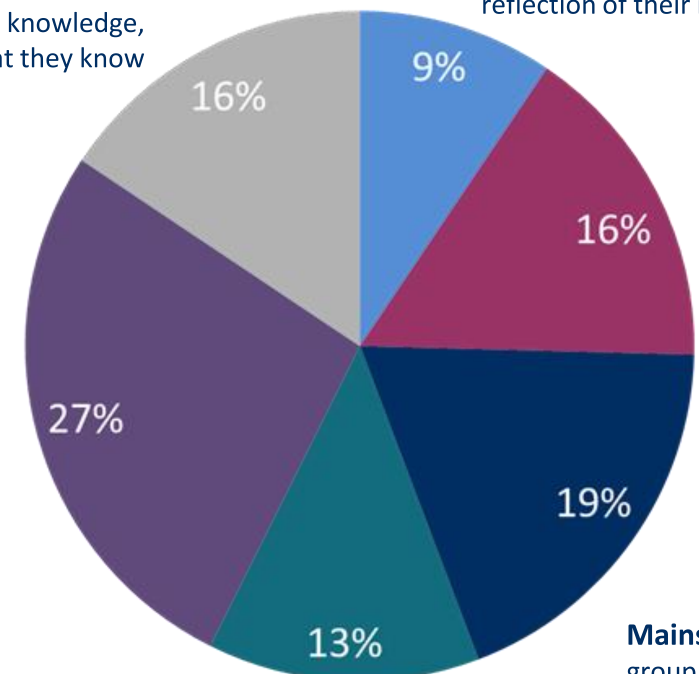
AUSTRALIA PORTRAITS SEGMENTATION

% Share of Australian regular wine drinkers by Portraits segments

Engaged Explorers: One of the younger segments, typically under 44 years, with a higher proportion of men. They are the most frequent wine drinkers and the highest spenders, buying from a broad repertoire of wine styles, countries and regions. With a high level of confidence yet mid-level knowledge of wine, which is a reflection of their relatively shorter time as wine drinkers

Kitchen Casuals: A majority are aged over 45 years old, while drinking wine infrequently and almost exclusively at home. They have the lowest overall spend on wine and demonstrate limited knowledge, tending to stick to what they know



Social Newbies: Youngest segment with majority of wine drinkers under 35 years old and a higher proportion of men. They are more likely to drink wine in the on-premise or in a social setting. Their limited experience means they have less knowledge of wine and are more likely to ask for recommendations from friends and family when choosing wine

Senior Bargain Hunters: One of the oldest wine drinking segments with a small share of total spend. Time in the category has led to relatively strong wine knowledge, but low involvement. However, they still purchase from a narrow repertoire of wine styles and brands, being strongly value driven

Mainstream Matures: A majority of people in this group are aged over 45 with equal male and female representation. They demonstrate the highest levels of knowledge, involvement and confidence of all segments in the wine category and are very value driven wine consumers

Contented Treaters: Aged between 24 to 44 years old and skewed female, with reasonable levels of wine knowledge, involvement and willingness to spend more per bottle of wine. Their low levels of wine consumption frequency leads to to low levels of confidence

Source: Wine Intelligence, Vinitrac® Australia, July 18, Oct'18 (n=4,000) Australian regular wine drinkers

RESEARCH METHODOLOGY: QUANTITATIVE

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

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

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

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

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

The distribution of the sample is shown in the table:

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

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

RESEARCH METHODOLOGY: QUALITITATIVE

TRADE INTERVIEWEES

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

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

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

1 x Producer

1 x Category Manager, National Retailer

1 x Marketing Manager, Producer

Wine Intelligence Ltd Terms and Conditions of Licence for Syndicated Research Products – key sections

Definitions and Interpretation

The “Agreement” means the Agreement between Wine Intelligence Ltd and the Customer to provide a Licence for the use of the Syndicated Research Report(s) for Fees on these terms and conditions of business and as set out in a Proposal and the Acceptance of Proposal

“WI” is Wine Intelligence Ltd, trading as Wine Intelligence.

“Customer” means the person or entity purchasing the Licence for the use of the Syndicated Research Report(s)

“Proprietary Information” means all information contained in the Syndicated Research Report(s) and associated briefings or presentations by WI, plus all logos, Processes, third party data and formats contained therein

“Licence” means the Customer’s right to use, store, retrieve and disseminate the Syndicated Research Report(s), as defined by the Agreement

“Acceptance of Proposal” means the document provided by the Customer to WI confirming the terms of engagement of WI to provide the Customer with the Licence for the use of the Syndicated Research Report(s)

“Fees” means the fees payable by the Customer to WI, as set out in the Contract, plus VAT at the current rate, subject to exemptions as set out in UK and EU law

“Processes” means any research processes, techniques and methodologies used in the creation of the Syndicated Research Report(s)

“Proposal” means the specification of the Syndicated Research Report(s) by WI to the Customer

“Syndicated Research Report” means a written document containing Wine Intelligence copyright materials such as data, information, insight, commentary, either written, oral, video, or audio and, where appropriate, copyright materials of a Third Party that have been reproduced by permission

“Representative Organisation” means any body, association, trading group, generic organisation or any other coalition of interested parties, howsoever constituted, that acts on behalf of a broader group of stakeholders

“Subscription Products” means Syndicated Research Reports delivered to the Customer periodically as part of an ongoing Agreement

1. Engagement

The Customer engages WI to provide the Syndicated Research Report(s), and WI agrees to do so upon the terms of the Agreement for payment of the Fees.

The Fees for the Syndicated Research Reports shall be priced in Pounds Sterling. WI will publish indicative prices in Euros, [XX] Dollars, Australian Dollars, Canadian Dollars from time to time, and the Customer will have the opportunity to pay for Syndicated Research Reports using these currencies. Should the Customer opt for this form of payment the exact amount payable will be based on the prevailing exchange rate at the time of the execution of the Agreement.

2.. **Copyright**

2.1 The Copyright in the Syndicated Research Report(s) shall at all times vest with WI. The copyright in all artwork, data and copy for each element of the report created and assembled by WI shall at all times remain the property of WI.

2.2 All copyright and any other intellectual property rights in any material produced supplied or made available by a third party to WI for inclusion in the Syndicated Research Report shall remain the property of the third party. The Customer warrants its title to WI, except as may be expressly disclosed in writing, and agrees to indemnify WI against any claims by third parties in respect of any infringement of their copyright or other intellectual property rights.

2.3 WI asserts to the Customer its moral right to be identified as the author of the Syndicated Research Report in accordance with the UK Copyright Designs and Patents Act 1988 Section 77 and 78, and shall be entitled to hold itself out as the author of the Syndicated Research Report (and in particular the research undertaken in the process of completing the Syndicated Research Report) as part of WI’s own general marketing activities. WI shall be entitled to publish the name of the Customer in association with the Syndicated Research Report(s) as part of this general marketing activities.

2.4 The copyright in the Processes used to execute the Syndicated Research Report shall remain the property of WI throughout.

3. Licence

3.1 WI grants to the Customer under the Agreement a non-exclusive Licence in perpetuity to store and retrieve an electronic version of the Syndicated Research Report(s)

3.2 The Customer is entitled to disseminate the Syndicated Research Report(s) within its immediate organisation, including organisations affiliated by majority shareholdings, legally liable partnerships, or other majority ownership structure

3.3 If the Customer is a Representative Organisation, the entitlement outlined in Clause 7.2 DOES NOT extend to parties who hold membership or similar interest in the Representative Organisation, except by specific written permission from WI and the payment of further Fees associated with a Multi-User Licence

3.4 The Customer is entitled to extract elements of the Syndicated Research Report and re-use them for internal and external presentations, subject to the doctrine of Fair Use

3.5 At all times the Customer must identify any information extracted from the Syndicated Research Report in 7.5 above as being from WI

4. Warranties

No advice or information whether oral or written provided by WI to the Customer through the Syndicated Research Report(s) shall create any warranty not expressly stated in this Agreement.

The Client warrants and undertakes to abide by the UK Copyright Designs and Patents Act 1988 Section 77 & 78, and undertakes to obey the copyright restrictions on any materials received as part of this Agreement.

Please contact Wine Intelligence for full terms and conditions

Connecting wine businesses with knowledge and insights globally

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