Wine Australia Consumer Survey Report

2022

INTRODUCTION

Following a 5-year U.S. market research project conducted from 2014 to 2019, Wine Australia engaged Wine Opinions to conduct U.S. trade and consumer research initiatives for a 4-year period from 2022 through 2025. The 2022 consumer survey repeated several essential inquiries from the 2019 survey for the purpose of updating baseline data. The new survey also placed greater focus on Australian wines in higher price tiers, and current consumer issues of most relevance to the ongoing Wine Australia campaign in the U.S.

Objectives

The objectives of the 2022 survey were as follows:

- *Track changes in the demographic profiles of those who regularly buy Australian wines and the wines of competitor regions*
- *Determine levels of interest or trial of Australian wines across varietal types among those who purchase each type*
- *Compare purchases of Australian wines to wines from competitor countries by price segment, ranging from under $20 to $40 or more*
- *Establish "quality for price" perceptions of Australian and competitor imported wines by price segment*
- *Track changes in awareness, trial, and purchase of Australian wines of each producing region*
- *Identify the factors that are most influential to consumer choice of a new wine to try*
- *Evaluate the degree of purchase influence of the leading wine critics*
- *Measure the degree of consumer interest or purchase of wines with lower alcohol, sugar, carbohydrates, or related attributes*
- *Determine the importance to consumers of organically grown grapes and/or wines produced by wineries with certifications for sustainable practices*
- *Measure the degree of consumer engagement with social media channels as conduits of wine information and the degree to which they follow the social media accounts of wine publications, wine regions, retailers, critics, wineries, and brands*

INTRODUCTION (continued)

Methodology

There were 1,438 respondents in total, of which 85% were high frequency wine drinkers. Among all respondents, 548 had purchased an Australian wine in the past 12 months. Results were calculated at a confidence level of 90%. Confidence intervals for the total sample were ± 1.32% to ± 2.2%. In some cases, rows or columns of figures do not add to 100% due to rounding.

Note: Light tan shadings in tables call out row or column numbers of directional interest or statistical significance.

Analysis and Reporting

All questions were cross-tabulated by the following segments, and significant differences of note are highlighted in this report:

- *Age Segments: 21 - 39, 40 - 59, 60 - plus*
- *Gender*
- *Those who purchase wines costing $20 - $30 (but not $30-plus) vs. those who purchase wines costing $30 – plus*
- *Past 12-month purchasers of Australian wines vs. those who have not purchased Australian wines in the past 12 months.*
- *Those who have purchased Australian wines costing $20 or more in the past 12 months vs. those who have purchased Australian wine in the past 12 months, but not in the $20 or more price segments*
- *All purchasers of Australian wines costing $30-plus vs. those who buy $30-plus wines from other regions but NOT Australia*

KEY TAKEAWAYS

- ***Australian Wine Buyers:*** *Purchasers of Australian wines generally conform to the age segments of high frequency wine drinkers. However, a greater percentage of wine drinkers under age 40 are buyers of $30-plus Australian wines than those who buy $30-plus wines from other regions but not Australia. As well, Australian wine buyers overall are significantly more likely to be males than those who do not buy Australian wines. They also show higher levels of engagement in social media for the purpose of pursuing their interests in wine.*
- ***Organic and Sustainable:*** *More than two-thirds of those who buy Australian wines costing $20 or more consider organically grown grapes and certified sustainable wine production to be of importance in making wine purchase decisions.*
- ***Interest in Australian Wines:*** *Among Australian wine buyers who had not tried such wines from Australia, interest in trying rosé, Riesling, Pinot Noir, and Rhone-style blends was somewhat higher than for other types of Australian wine.*
- ***Australian Wine Regions:*** *As in the 2019 consumer survey, more than half of all survey respondents stated an interest in the different regions and appellations of Australia. This sentiment was highest among wine drinkers under the age of 40.*
- ***Quality Ratings:*** *Purchasers of Australian wines costing $20 - $30 or $30-plus expressed very high levels of satisfaction with the "quality for the price" of the wines. High ratings were consistent across age and gender segments.*
- ***Lack of Familiarity:*** *Among those who have not purchased an Australian wine costing over $20, nearly two-thirds felt "not familiar enough" to make a good choice.*

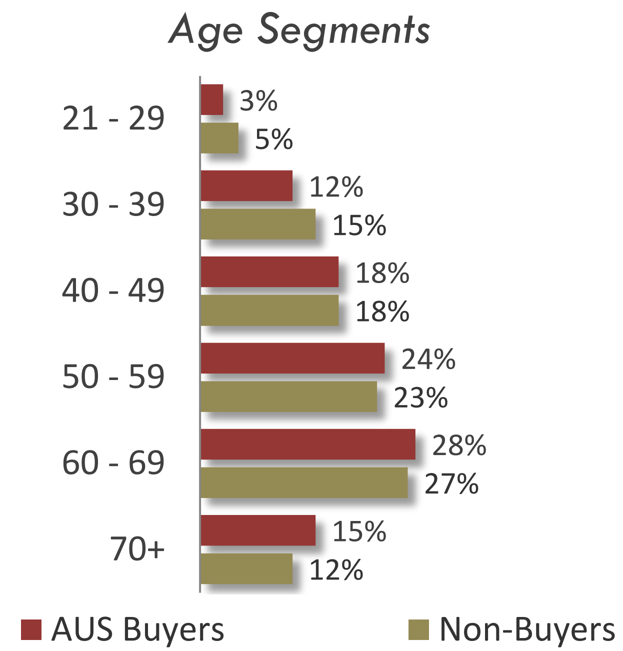
RESPONDENT PROFILES

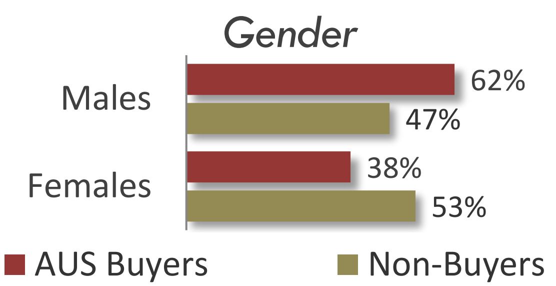
There were 548 respondents who purchased Australian wines in the past 12 months. There were also 801 respondents who had not purchased an Australian wine in the past 12 months. There were only slight differences in the age profiles of these two groups. However, there was a slight skew to under age 40 buyers of $30-plus Australian wines compared to those who buy $30-plus wines from other regions but not Australia (21% vs. 17%, respectively).

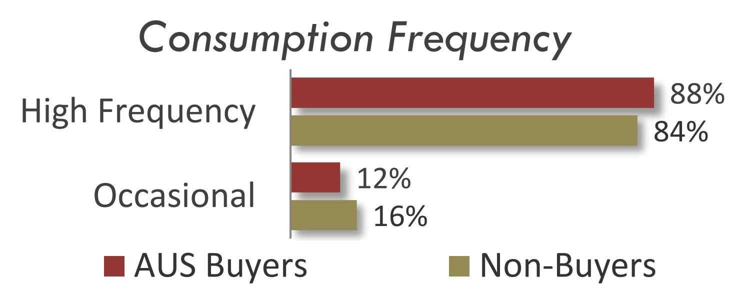
It was also notable that those who buy Australian wines under (and not over) $20 skewed higher in the 60 - 69 age range, compared to buyers of Australian wines costing $20 or more (30% vs 24%, respectively).

The Australian wine buyers vs non-buyers differed significantly in their gender composition, as Australian wine buyers were predominantly male, while the group that had not purchased Australian wines in the past 12 months skewed somewhat female.

Australian wine buyers were also somewhat more likely to be high frequency wine drinkers (drinking wine “a few days a week” or “every day”) than those who had not bought an Australian wine in the past 12 months.





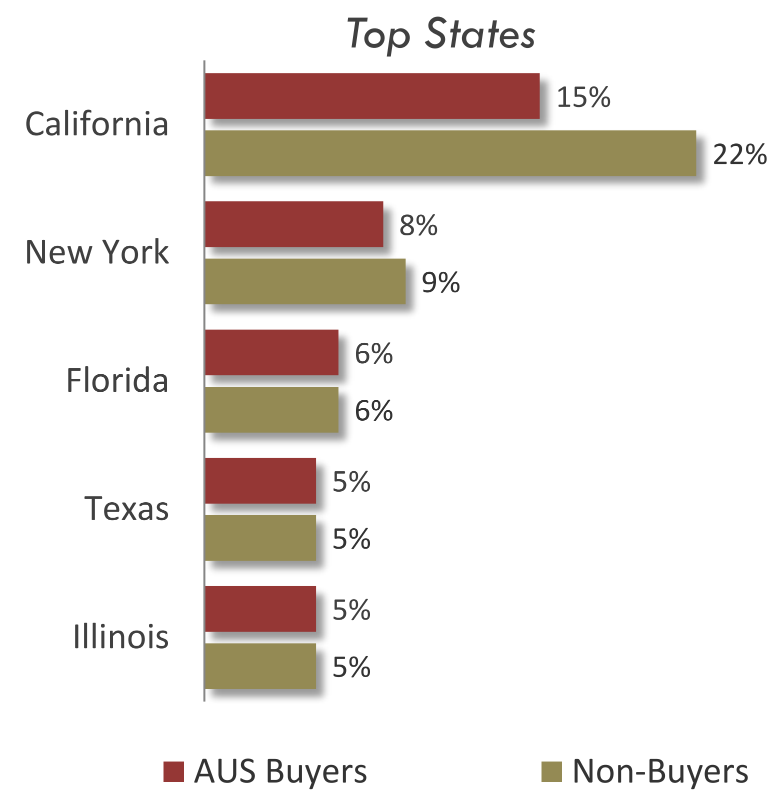


RESPONDENT PROFILES (continued)

The overall distribution of survey respondents followed the expected skew to the states with major metropolitan area wine markets, though all 50 states and the District of Columbia were represented.

Looking at Australian wine buyers vs. non-buyers, there were significant skews to non-buyers in California. However, among those who sometimes or regularly buy Australian Shiraz wines, the California skew was reversed, with 21% of Shiraz buyers residing in the Golden State, compared to 17% of those who do not buy Australian Shiraz wines. This suggests that East Coast Syrah buyers are getting more of such wines from European sources, while Californians who like Syrah/Shiraz are getting a significant share of the wine such wines from Australia.

When New York, New Jersey, and Connecticut are combined as a “Metropolitan New York” market, they account for 15% of Australian wine buyers vs. 12% of those who do not buy Australian wines.



SOCIAL MEDIA CHANNELS

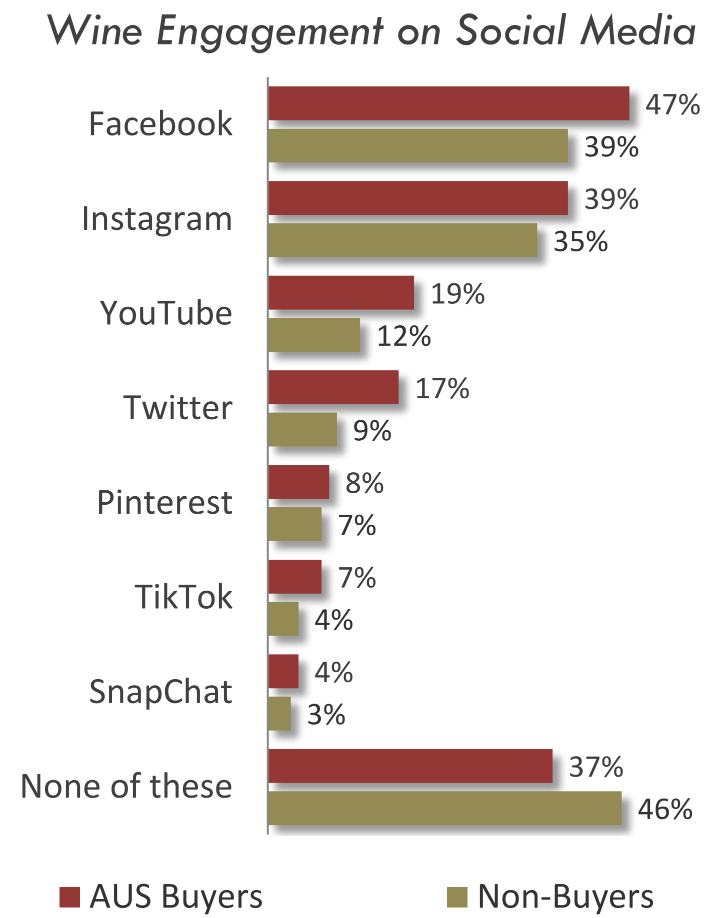
Respondents were asked to check any of the listed social media channels they use to post, discuss, or get information about wine, or recommendations of wine at least once a week or more often.

Among all respondents, 37% of Australian wine buyers and 46% of those who have not purchased an Australian wine in the past 12 months indicated they did not use any of the social media channels.

Female respondents were more likely than males to cite the usage of Instagram, Pinterest, and SnapChat. Males were more likely to cite Twitter.

Instagram, YouTube, and TikTok all skewed in usage to the age 21-39 segment.

Buyers of Australian wines costing $20 or more were significantly more likely than those who buy Australian wines under $20 to use Facebook, Instagram, YouTube, Twitter, TikTok, and Snapchat for wine-related purposes.



SOCIAL MEDIA ACCOUNTS FOLLOWED

Those who use social media for wine-related purposes were asked to check from a list any of the types of wine businesses or publications they follow on social media.

Among all respondents, wineries or wine brands were followed by 82%, with little differentiation by age, gender, or purchase of Australian wines.

Males were somewhat more likely than females to follow wine publications, regions, wine bloggers, and critics. Females were more likely to follow restaurants or sommeliers.

As might be expected, younger respondents more often followed most of the wine-interest sites, except for the sites of wine regions, which were significantly more often followed by those who are age 60 or older.

While buyers of Australian wines of any price were likely to be followers of wineries, retailers, and wine regions, those who buy Australian wines costing over $20 were significantly more likely to be following wine publications, restaurants or sommeliers, wine bloggers or influencers, and wine critic sites.

Types of Social Media Accounts Followed

Account Type	*Male*	*Female*	*21 – 39*	*40 – 59*	*60-plus*	*AUS $20+*	*AUS <$20*
Winery or wine brand	83%	82%	83%	86%	78%	83%	78%
Wine retail store	67%	62%	76%	66%	56%	69%	69%
Wine publication	67%	49%	61%	58%	58%	68%	55%
Restaurant or sommelier	55%	62%	73%	63%	43%	64%	47%
Wine region	56%	43%	41%	48%	57%	56%	50%
Wine blogger or influencer	41%	34%	55%	39%	26%	49%	24%
Wine critic site	36%	22%	30%	30%	27%	37%	22%

750ml BOTTLE PURCHASES BY PRICE SEGMENT

Respondents were asked to state their frequency of purchase of 750ml wines at retail by price segment.

About two-thirds of all respondents purchase wines under $20 on a monthly or weekly basis.

Female respondents were somewhat more likely than males to be regular purchasers of wines costing less than $15, while males were somewhat to significantly more likely to be monthly or weekly purchasers of $15-plus wines.

Respondents under the age of 60 were more frequent purchasers of wines costing $20 or more, though purchase frequencies by age varied only slightly for wines costing $40 or more.

Unsurprisingly, those who have purchased Australian wines costing $20 or more several times or more frequently in the past 12 months were more likely than others to be frequent purchasers of wines costing more than $20 – particularly wines in the $20 - $30 price segment.

Monthly or Weekly Purchases

Price Range	*Male*	*Female*	*21 – 39*	*40 – 59*	*60-plus*	*AUS $20+*	*AUS <$20*
Under $15	60%	66%	63%	63%	62%	65%	77%
$15 - $20	68%	61%	66%	64%	66%	74%	61%
$20 - $30	54%	38%	50%	49%	41%	66%	26%
$30 - $40	35%	17%	29%	31%	21%	46%	11%
$40 or more	23%	8%	17%	19%	12%	30%	6%

PURCHASE INFLUENCE FACTORS

Respondents were asked to rate the importance of a number of factors on a scale representing their degree of influence over the purchase of a new wine. Overall, the grape variety and region of production were the factors deemed most influential across age and gender groups, as well as buyers of Australian wines at any price level. Knowing the region of production was also somewhat more valued by respondents over the age of 40.

Females were somewhat more likely than males to find recommendations from friends or store staff to be influential.

It was of note that those who buy Australian wines costing over $30 were significantly more likely than those who buy $30-plus wines but NOT wines from Australia to value scores of 90 or more from wine critics or publications.

Those who have purchased Australian wines in the past 12 months (in comparison to those who have not) were significantly more likely to state the influence of 90+ wine scores, recommendations from wine-knowledgeable family members or friends, and “crowd-sourced” ratings on wine apps such as Vivino or CellarTracker.

Ratings of “6” or “7” on 7-Point Scale

Factors	*Male*	*Female*	*21 – 39*	*40 – 59*	*60-plus*	*Buys AUS $30+*	*Buys $30+ not AUS*
Wine is from a region you know and like	68%	67%	62%	67%	69%	70%	72%
Score of 90+ from critic or wine publication	31%	30%	22%	27%	37%	35%	24%
Recommendation from wine-knowledgeable family member or friend	45%	52%	51%	51%	45%	50%	52%
The grape variety is among your favorites	71%	72%	68%	72%	73%	74%	72%
Recommendation from retail store staff	27%	31%	32%	28%	29%	27%	31%
High rating from users of apps like Vivino or Cellartracker	18%	16%	21%	18%	14%	22%	19%

INFLUENCE OF WINE CRITICS OR PUBLICATIONS

Respondents were asked to check from a list of wine publications and critics any whose wine ratings would influence their purchase decision when buying a wine they had not previously tasted.

In total, the Wine Spectator and Wine Enthusiast were the only publications cited by more than half of respondents (82% and 75%, respectively).

The influence of the publications and critics mostly skewed to males, except for the Wine Enthusiast and the columnists for the New York Times and Wall Street Journal. The newspaper columns also skewed somewhat to an under-40 audience, while the influence of the Wine Advocate and Jancis Robinson skewed significantly to those in the age 60 or older segment.

It was also of interest that the Vinous website was the only publication deemed influential to a greater percentage of those who buy Australian wines costing over $30 than those who buy wines in that price segment, but not Australian wines.

Purchase Decision Influence

Critic / Publication	*Male*	*Female*	*21 – 39*	*40 – 59*	*60-plus*	*Buys AUS $30+*	*Buys $30+ not AUS*
Wine Spectator	86%	77%	75%	81%	85%	79%	86%
Wine Enthusiast	75%	75%	79%	73%	75%	64%	72%
Robert Parker Wine Advocate	55%	33%	37%	37%	55%	62%	54%
James Suckling	47%	24%	35%	32%	41%	51%	50%
New York Times – Eric Asimov	26%	25%	41%	26%	21%	25%	28%
Decanter Magazine	22%	13%	21%	18%	16%	27%	24%
Jancis Robinson	21%	9%	11%	13%	19%	26%	23%
Wall Street Journal – Lettie Teague	15%	13%	29%	11%	14%	20%	13%
Antonio Galloni - Vinous	20%	6%	13%	11%	17%	31%	21%

INTEREST IN “LOW OR NO” ATTRIBUTES

Respondents were asked to review a list of attributes common to the “better for you” category of wines and indicated their level of interest in each attribute, assuming they had not purchased such wines.

There were between 1% - 5% of respondents who had purchased wine with one or more of the attributes and they were eliminated from analysis.

Females were significantly more interested than males in each of the attributes, except for reduced alcohol or no alcohol.

Lower alcohol wines were of interest to about 4 in 10 respondents across all age groups. Lower calories or carbohydrates and gluten-free wines were mainly of interest to respondents under the age of 60.

“Somewhat” or “Very” Interested

Attribute	*Male*	*Female*	*21 – 39*	*40 – 59*	*60-plus*	*AUS $20+*	*AUS <$20*
Low calories or carbohydrates	26%	45%	40%	37%	29%	34%	30%
Vegan	18%	27%	30%	25%	16%	17%	22%
Low alcohol (5% - 9%)	38%	43%	40%	41%	40%	42%	39%
Zero alcohol	12%	19%	21%	18%	10%	18%	17%
Low (or no) sugar	36%	51%	45%	44%	41%	41%	42%
Gluten free	15%	25%	27%	23%	12%	22%	16%

ORGANIC GRAPES AND SUSTAINABLE PRACTICES

Respondents were asked to indicate the level of importance they give to wines made from organically grown grapes or made by wineries that are certified for their sustainable production practices.

Across consumer segments tested, nearly all showed that approximately two-thirds of respondents considered these attributes “somewhat” or “very” important in the wines they purchase.

Interest in both organically grown grapes and sustainable production skewed to females and mostly to the under-60 age segments.

Buyers of Australian wines costing $20 or more favored organically grown grapes to a significantly greater degree than those who only buy Australian wines costing less than $20.

“Somewhat” or “Very” Important

Factors	*Male*	*Female*	*21 – 39*	*40 – 59*	*60-plus*	*AUS $20+*	*AUS <$20*
Organically grown grapes	58%	63%	60%	63%	58%	65%	50%
Certified sustainable production	65%	70%	72%	67%	66%	68%	64%

INTEREST IN AUSTRALIAN WINES

Respondents were asked to indicate the varietal types of wine they sometimes or regularly purchase. For each varietal type they buy, they were then asked whether they buy, have tried and liked, or have tried and not liked that type of wine from Australia.

Following is a summary of the levels of trial and interest expressed in Australian wines of each varietal type included in the survey.

Chardonnay

There were 14% of Chardonnay drinkers in the survey who buy Australian Chardonnay at least occasionally and another 44% who have tried and liked but don't currently purchase Australian Chardonnay.

Interest in trying Australian Chardonnay was expressed by 27% of the Chardonnay drinkers and 7% were not interested. Younger wine drinkers were more likely interested and interest skewed somewhat to females.

Riesling

Just 9% of Riesling drinkers surveyed buy Australian Riesling wines and another 26% have tried and liked but don't currently buy Australian Riesling. However, nearly half (47%) have not tried an Australian Riesling but expressed interest.

As with Chardonnay, interest in trying Australian Riesling skewed to females. Interest in trying Australian Riesling also skewed to those who have not purchased an Australian wine in the past 12 months.

Cabernet Sauvignon

Among Cabernet Sauvignon drinkers, 17% buy Australian Cabernet Sauvignon at least occasionally and another 47% have tried and liked it. Interest in trying Australian Cabernet Sauvignon was expressed by 24% of Cabernet drinkers. Another 5% were not interested.

Interest in trying Australian Cabernet Sauvignon skewed significantly to respondents under age 40 and – again – to females.

Pinot Noir

As with Riesling, just 9% of Pinot Noir drinkers surveyed had purchased an Australian Pinot Noir. There were also 34% who had tried and liked the wine.

Interest in trying Australian Pinot Noir was expressed by 41% of the Pinot Noir drinkers in the survey. There were 8% who were not interested.

Interest in trying Australian Pinot Noir skewed just slightly to females (47%, vs 36% of males). Interest in trying Pinot

INTEREST IN AUSTRALIAN WINES (continued)

Noir from Australia was also significantly higher among those who buy $20 - $30 wines, but not wines costing $30 or more (46%, vs. 33% respectively). And just over half of those who had not purchased an Australian wine in the past 12 months were interested in trying Australian Pinot Noir.

Shiraz

There were 35% of survey respondents who indicated that they buy Shiraz and that they at least occasionally buy Australian Shiraz. Another 45% indicated that they have tried and liked Australian Shiraz but have not purchased it. There were just 12% of respondents who indicated at least occasional purchase of Shiraz who also indicated they had not tried Australian Shiraz but were interested in doing so. Only 3% who have tried Australian Shiraz were not interested in buying.

Interest in Australian Shiraz skewed to the younger age segments.

NOTE: Wine Opinions believes that many respondents are Syrah buyers who recognized “Shiraz” as the Australian term for Syrah, and checked it because “Syrah” was not a choice offered on the list. Therefore, the percentages cited above may not fairly represent the market position or consumer usage and attitudes regarding Australian Shiraz.

Rhone-Style Blends

Among those who at least occasionally buy Rhone-style blends, 13% have bought such wines from Australia, and another 28% have tried and liked Rhone-style blended wines from Australia. The largest segment of respondent who have tried and liked or purchase Rhone-style blends indicated they had not tried such wines from Australia but were interested in trying them (46%).

Those with an interest in Australian Rhone-style blends skewed significantly to the 21 – 39 age segment and to those who buy Australian wines under $20. Females were somewhat more likely to have an interest in trying these wines.

Other Red Blends

There were 14% of respondents who indicated at least occasional purchase of red blended wines from Australia that were not Rhone-style blends. Another 38% had tried and liked such wines. There were also 37% of respondents who at least occasionally buy red blended wines that are not Rhone varieties indicating an interest in trying such wines from Australia. Interest also skewed

INTEREST IN AUSTRALIAN WINES (continued)

to females and those in the 21 – 39 age segment.

Rosé Wine

Of all wine types, rosé wine from Australia was purchased at least occasionally by the smallest number of survey respondents (4%). An additional 17% indicated trying and liking a rosé wine from Australia.

There were 62% of respondents who had not tried rosé wines from Australia but were interested in trying them. These respondents skewed significantly to females and the 21-39 age segment, and to those who currently buy Australian wines under $20.

Sparkling Wine

Only 6% of those who sometimes or regularly buy sparkling wines buy Australian sparkling wines sometimes or regularly. Another 21% have tried and liked the wines.

Interest in trying Australian wines skewed significantly to respondents under the age of 40 (63%), and was also high among those aged 40 – 59 (55%). Females were significantly more interested in trial than males.

ROSÉ WINE PREFERENCES

Respondents who sometimes or regularly buy rosé wines were asked to review a series of statements about their preferences or interest in such wines and to check only the statements they agreed with.

Most of the rosé drinkers buy rosé wines of multiple regions or countries, are interested in trying more and different styles, and sometimes buy sparkling rosé wines.

Sweetness/dryness preferences divide along gender lines, with males leaning toward the drier wines and about one in three females preferring some sweetness in their rosé wines.

Sparkling rosé purchases skew significantly to younger rose buyers.

Those who buy Australian wines costing $20 or more stated the highest levels of purchase for rosé wines of several regions or countries.

About 1 in 4 rosé drinker respondents indicated that they most often buy rosé wines of Provence.

Rosé Wine Agreement Statements

Statements	*Male*	*Female*	*21 – 39*	*40 – 59*	*60-plus*	*AUS $20+*	*AUS <$20*
I buy rosé wines of several regions or countries	82%	69%	75%	75%	77%	91%	78%
I sometimes buy sparkling rosé wines	69%	72%	80%	74%	60%	72%	71%
I'm very interested in trying more and different types and styles of rosé wine	66%	65%	69%	65%	64%	70%	71%
I prefer the very driest style of rosé	57%	49%	56%	53%	52%	56%	57%
I like rose wines that are quite fruity, with just a hint of sweetness	19%	35%	33%	27%	23%	22%	28%
I like rosé wines that have a little ore color and flavor than the rosé wines of Provence.	27%	22%	29%	20%	28%	28%	25%
I mostly buy rosé wines of Provence	24%	20%	22%	20%	24%	25%	17%

SUMMARY OF INTEREST IN AUSTRALIAN WINES

The chart below summarizes respondent interest in trying an Australian wine of a varietal type they like or buy at least occasionally. The data displayed shows the percentage of each consumer segment who indicated they have not tried but are interested in trying an Australian wine of each type listed.

Female interest in trying the wines significantly exceeded male interest for each varietal type. Interest in trying Riesling, Rhone-style blends, and rosé wines from Australia was indicated by more than half to two-thirds of the female respondents who had not yet tried those wines from Australia.

Similarly, the 21 – 39 age segment showed the greatest interest in every varietal type.

Among buyers of Australian wines over $20, interest in trying rosé, Riesling, Pinot Noir, and Rhone-style blends was highest. Those who buy Australian wines under $20 were most interested in trying rosé, Rhone-style blends, Riesling, and Pinot Noir wines from Australia.

"Have not tried but interested"

Statements	*Male*	*Female*	*21 – 39*	*40 – 59*	*60-plus*	*AUS $20+*	*AUS <$20*
Chardonnay	22%	34%	42%	30%	18%	10%	28%
Riesling	41%	54%	49%	46%	46%	31%	53%
Cabernet Sauvignon	17%	32%	37%	24%	18%	6%	19%
Pinot Noir	36%	47%	48%	38%	41%	23%	50%
Shiraz	8%	18%	17%	13%	10%	3%	5%
Rhone-style blends	41%	54%	52%	49%	42%	27%	53%
Other red blends	33%	41%	42%	37%	34%	20%	37%
Rosé	58%	65%	68%	61%	59%	46%	73%

AUSTRALIAN WINE PURCHASES BY PRICE SEGMENT

The chart below summarizes past-12-months purchases of Australian wines by price and demographic segments. There were 722 respondents in total indicating past-12-month purchase of Australian wines costing $20 or more.

Over half of Australian wine buyers had purchased an Australian wine for less than $20 in the past 12 months. One in four had purchased an Australian wine in the $25 - $29.99 price range. And one in ten had purchased an Australian wine costing $40 or more.

Females were more likely than males to have purchased an Australian wine under $20. Males were significantly more likely to be purchasers of Australian wines in the $25 and over price segments.

Respondents under age 60 were significantly more likely than those 60 and older to have purchased Australian wines costing $40 or more.

It was also of note that purchases of Australian wines in the $20 - $24.99 price segment skewed somewhat to those in the age 21 – 39 segment.

Purchases of Australian Wine in Past 12 Months

Price	*Total*	*Male*	*Female*	*21 – 39*	*40 – 59*	*60-plus*
Under $20	56%	52%	61%	62%	54%	55%
$20 - $24.99	47%	50%	44%	53%	48%	44%
$25 - $29.99	26%	31%	19%	24%	29%	24%
$30 - $39.99	15%	19%	10%	21%	15%	13%
$40 or more	10%	13%	6%	13%	12%	7%

AUSTRALIAN WINE QUALITY RATINGS

Respondents who had purchased Australian wines in either the $20 - $29.99 or $30 – plus price ranges in the past 12 months were asked to rate the ”quality for the price” of their purchases.

The chart below shows the sum of ”good” and “excellent” ratings.

In the $20 - $29.99 category, 56% of respondents gave ratings of “good,” compared to 32% rating their Australian wine purchase “excellent.” The remaining 12% were ratings of “average,” or “poor.”

Females and those in the 40 – 59 age segment gave the highest ratings of wines in the $20 - $29.99 category.

In the $30 or more category, “quality for the price” ratings were somewhat higher than for the $20 - $29.99. Among respondents in total, 47% gave ratings of “good,” and 45% gave ratings of “excellent.”

As with the $20 - $29.99 category, females gave somewhat higher quality ratings than males to their purchases of $30-plus Australian wines. It was of note that “excellent” ratings for the $30-plus wines were given by 60% of those in the ages 21 – 39 segment, compared to 47% of those in the 40 – 59 segment and just 33% of those in ages 60-plus.

“Good” or “Excellent” Ratings of Australian Wine Purchases

Price	Total	Male	Female	21 – 39	40 – 59	60-plus
$20 - $29.99	88%	86%	90%	83%	92%	85%
$30 or more	92%	91%	94%	93%	93%	88%

NON-PURCHASERS OF $20-PLUS AUSTRALIAN WINES

Those who has not purchased an Australian wine costing $20 or more in the past 12 months were asked to review a series of statements that might be reasons they have not made such purchases and check any with which they were in agreement.

By far, unfamiliarity was the leading reason for not purchasing a $20-plus Australian wine. This was agreed to by nearly two-thirds of respondents across age groups.

Females were significantly more likely than males to profess unfamiliarity with Australian wines, as well as not buying imported wines very often. Males were significantly more likely than females to state a liking for European wines or wines from countries other than Australia, or that they had tried and not liked an over-$20 Australian wine.

Across age segments, reasons to have not purchased an over-$20 Australian wine were remarkably similar.

Reasons Have Not Purchased Australian Wine $20-Plus

Price	*Total*	*Male*	*Female*	*21 – 39*	*40 – 59*	*60-plus*
Not familiar enough with Australian wines $20-plus to make a good choice	61%	56%	65%	62%	60%	61%
For $20-plus, I prefer “old world” wines from European wine regions	31%	38%	25%	26%	33%	30%
I prefer imported wines from other countries	31%	39%	23%	28%	33%	29%
I don’t buy imported wines very often	16%	14%	19%	19%	16%	16%
I don’t think Australian wines offer good value for the price	12%	16%	8%	8%	13%	13%
I’ve tried $20-plus Australian wines and mostly did not like them	6%	9%	4%	6%	7%	5%

2022 AUSTRALIAN WINE REGION FAMILIARITY

In comparison to the 2019 survey, there was slight improvement in awareness of nearly all regions, especially Adelaide Hills (42% ”have not heard of” in 2019 vs. 37% in 2022) and Margaret River (53% “have not heard of” in 2019 vs. 49% in 2022).

Taking “tried and liked” together with “buy at least occasionally,” the leading regions are Barossa Valley (46%), McLaren Vale (41%), Adelaide Hills (37%). Tasmania “tried and liked” or “buy at least occasionally” was lowest, at 20%.

As in 2019, the percentages of respondents who “tried and did NOT like” wines of each region were between 1% - 3%, approximately 10 times smaller than the percentages who had “tried and liked” the wines of each region.

*Degree of Familiarity and Trial**

	LIKE/BUY AT LEAST OCCASIONALLY	TRIED AND LIKED	TRIED AND DID NOT LIKE	HEARD OF/NOT TRIED	HAVE NOT HEARD OF
Barossa Valley	18%	28%	3%	14%	37%
McLaren Vale	16%	25%	2%	15%	43%
Coonawarra	9%	24%	2%	19%	46%
Eden Valley	9%	25%	2%	23%	40%
Yarra Valley	8%	26%	3%	20%	43%
Adelaide Hills	9%	28%	2%	24%	37%
Margaret River	10%	23%	2%	17%	49%
Clare Valley	9%	23%	2%	19%	48%
Hunter Valley	8%	20%	2%	20%	50%
Tasmania	4%	16%	1%	47%	32%

*NOTE: shaded numbers call out differences in columns

AUSTRALIAN WINE AGREEMENT STATEMENTS

Nearly all respondents agreed with one or more of the statements they were shown, describing an aspect of Australian wines. There were slight to significant male skews to agreement with each statement.

More than half of all respondents (except those in ages 60-plus) agreed they were “intrigued by the different regions and appellations of Australia.” This sentiment skewed somewhat to those under the age of 40 and those who buy Australian wines costing $20 or more.

Only about 1 in 4 respondents agreed that they look to Australia mainly for “value wines.”

It was of note that those who at least occasionally buy Australian wines costing $20 or more were significantly more likely than the under-$20 buyers to agree that “Australian wines offer a lot of flavor for the money.”

Australian Wine Agreement Statements

Statements	*Male*	*Female*	*21 – 39*	*40 – 59*	*60-plus*	*AUS $20+*	*AUS <$20*
I look to Australia more for reliable value wines than top quality or special occasion wines.	24%	18%	20%	19%	23%	28%	33%
For Australian wine, I mainly buy wines above $20, not the big-volume lower-priced brands.	26%	17%	26%	23%	20%	47%	9%
I look to Australia mainly for Shiraz. For other varieties I tend to buy from other countries.	33%	25%	35%	27%	29%	31%	46%
I am intrigued by the different regions and appellations of Australia.	56%	55%	69%	57%	48%	69%	54%
Australian wines offer a lot of flavor for the money.	43%	36%	33%	38%	44%	74%	43%
I don’t agree with any of these statements	13%	16%	13%	14%	16%	1%	5%

Appendix

SURVEY QUESTIONNAIRE

1. What is your age? *Drop-down list of exact ages starting with “Under 21” and ending with “70 and over.” (Under 21 disqualifies)*

2. What is your gender?

Male
Female

3. In what state do you live? *(Drop-down list of states)*

4. On average, how often do you drink wine?

Every day
A few times a week
About once a week
2-3 times a month
About once a month
Once every 2-3 months *(Disqualifies)*
Less often than once every 2-3 months *(Disqualifies)*

SURVEY QUESTIONNAIRE

5. Please indicate how often, on average, you buy wine at a retail store (not restaurant) in these price ranges (per 750ml bottle).

Weekly	Monthly	Several times a year	Less often	Never

Under $15
$15 - $20
$20 - $30
$30 - $40
$40 or more

6. When you are looking for a new wine to buy, how important are each of the factors listed below? On the 7-point scale, “7” means “very influential to my purchase decision" and “1” means "not at all influential to my purchase decision."

1 – Not at all influential	2	3	4	5	6	7 – Very influential

The wine is from a region that produces other wines you already know and like
A score of over 90 points from a wine critic or publication
Recommendation from a wine-knowledgeable family member or friend
The grape variety of the wine is among your favorites
Recommendation from the retail store staff
Ratings from other wine drinkers on an app or website such as Vivino or CellarTracker
(Choices rotate)

SURVEY QUESTIONNAIRE

At this point, those who checked "5," "6," or "7" for "A score of over 90 points" in Q6 are shown Q7. All others skip to Q8.

7. Please check any of the critics or publications listed below whose wine ratings would influence your decision to purchase a wine you have not tried.

The Wine Spectator
James Suckling
Wall Street Journal (Lettie Teague)
Robert Parker Wine Advocate
Decanter magazine
New York Times (Eric Asimov)
Jancis Robinson
The Wine Enthusiast
Antonio Galloni (Vinous)
Other - Please describe *(Open-ended text box)*
(Choices rotate except for last row)

SURVEY QUESTIONNAIRE

8. What is your degree of interest in wines with any of the attributes listed below? For each attribute listed, please the degree of interest you have in purchasing wines with that attribute.

Not interested	Somewhat interested	Very interested	Sometimes purchase

Low calories or carbohydrates
Vegan
Low alcohol (5% to 9%)
Alcohol-free (zero alcohol)
Low (or no) sugar
Gluten-free
(Attributes rotate)

9. Thinking of the wines you purchase, how important to you is it that the wine was made from organically grown grapes and/or that the winery has been certified for its sustainable practices? Please check the level of importance to you for each. If you have no opinion or are not sure, please choose that answer from the bottom of the list.

	Organically Grown Grapes	Certified Sustainable
Very important		
Somewhat important		
Not too important		
Not important at all		
No opinion or not sure		

SURVEY QUESTIONNAIRE

10. Please check any of the social media channels listed below that you use to post, discuss, or get information or recommendations on wine at least once a week or more often. If you don't use these social media channels and/or don't use them for gathering information on wine, please check "Don't use" from the bottom of the list.

Facebook
Twitter
TikTok
YouTube
Instagram
SnapChat
Pinterest
Don't use any of the above for wine
(Channels rotate)

At this point, those who checked Facebook, Twitter, or Instagram in Q10 are shown Q11. All others are skipped to Q12.

11. From the list below, please check any that you follow on social media.

Wine retail store
Wine publication or magazine
Winery or wine brand
A restaurant or sommelier
Wine critic site
A wine blogger or influencer
A wine region
(Choices rotate)

SURVEY QUESTIONNAIRE

12. What is your level of trial and/or purchase of the types of wine listed below?

Have not tried and not interested	Have not tried but AM interested	Tried and did NOT like	Tried and LIKED	Buy sometimes or regularly

Chardonnay
Riesling
Cabernet Sauvignon
Pinot Noir
Shiraz
"Rhone style" blends (Grenache, Syrah, Mourvedre, etc.)
Other Red blend wines
Rosé wine
Sparkling wine
(Varieties rotate)

At this point, those who indicated in Q12 that they sometimes or regularly buy rosé wines are shown Q13. All others skip to Q14.

13. Please check any of the statements below that describe your preferences or interests in rosé wines.

I like rosé wines that are quite fruity, with just a hint of sweetness
I mostly buy rosé wines of Provence
I buy rosé wines of several regions or countries
I like rosé wines that have a little more color and flavor than the rosé wines of Provence
I prefer the very driest style of rosé
I sometimes buy sparkling rosé wines
I'm very interested in trying more and different types and styles of rosé wines.
(Statements rotate)

SURVEY QUESTIONNAIRE

At this point, those who in Q12 indicated that they have tried and liked, or buy sometimes/regularly any wine varieties or types are shown Q14. All others are skipped to Q15.

14. You indicated you have tried and liked, or buy sometimes/regularly the wine types listed below. For each of these, please indicate your trial, usage, or level of interest in each of these types of wine from Australia.

Have not tried from Australia and not interested	Have not tried from Australia but AM interested	Tried from Australia and did NOT like	Tried from Australia and LIKED	Buy from Australia sometimes or regularly

Each row is a type of wine the respondent checked as either “tried and liked” or “buy sometimes/regularly” in Q12

15. You indicated you have not tried, but are interested in trying the wine types listed below. Please indicate if you would be interested in trying each of these types of Australian wine.

Interested in trying this type of wine from Australia	Not interested in trying this type of wine from Australia

Each row is a type of wine the respondent checked as either “tried and liked” or “buy sometimes/regularly” in Q14

SURVEY QUESTIONNAIRE

16. In the past 12 months, which of the following best describes your retail purchases of 750ml bottled **wines priced $20 or more** from the countries listed below? If you have not purchased wine from a given country, please choose that answer.

I purchased these wines frequently	Purchased several times	Purchased once or twice	Have not purchased in the past year

France
Spain
Italy
New Zealand
Argentina
Australia
Chile
(Countries rotate)

17. Thinking of the wines from the countries listed below that you have purchased in the past 12 months, please check the price ranges that apply to any wine purchases you made from each country. *(Matrix of checkboxes)*

Under $20	$20 - $24.99	$25 - $29.99	$30 - $39.99	$40 or more

Regions checked in Q16 as purchased "frequently," "several times," or "once/twice" are shown as rows

SURVEY QUESTIONNAIRE

At this point, those who checked Australian wines as purchased in the $20 - $24.99 or $25 - $29.99 price ranges in Q17 are shown Q18.

18. Overall, how would you rate the quality for the price of the Australian wines you purchased in the past 12 months that were in the price range of $20 - $29.99?

Excellent value for the price
Good value for the price
Average value for the price
Poor value for the price

At this point, those who checked Australian wines as purchased in the "$30 - $39.99" or "$40 or more" price ranges in Q17 are shown Q19.

19. Overall, how would you rate the quality for the price of the Australian wines you purchased in the past 12 months that were in the price range of $30 or more?

Excellent value for the price
Good value for the price
Average value for the price
Poor value for the price

SURVEY QUESTIONNAIRE

At this point, those who checked “Have not purchased” for Australian wines priced $20 or more in Q16 are shown Q20.

20. Please review the list below and check any statement that describes why you have not purchased an Australian wine priced $20 or more in the past 12 months. You may check as many statements as apply, or enter a reason in the text box at the bottom of the row.

I have tried Australian wines costing $20 or more and mostly did not like them
I don't buy imported wines very often
I prefer imported wines from other countries
I don't think Australian wines costing $20 or more offer good value for the price
At the $20 or more price levels, I prefer the "Old World" wines from European wine regions
I'm not familiar enough with Australian wines over $20 to make a good choice
Other - please explain (Open-ended comment box)

SURVEY QUESTIONNAIRE

21. Please indicate your familiarity with wines from the following regions in Australia. Please choose the answer closest to your experience.

Like these wines and buy them at least occasionally	Have tried the wines, liked them	Have tried the wines, did not like them	Have heard of, but not tried any of the wines	Have not heard of

Barossa Valley
Clare Valley
Eden Valley
Yarra Valley
Adelaide Hills
McLaren Vale
Hunter Valley
Margaret River
Coonawarra
Tasmania
(Regions rotate)

22. Please indicate IF YOU AGREE with any of the following statements by checking that statement. Please skip any statement that you do not agree with.

I look to Australia more for reliable value wines than top quality or special occasion wines
For Australian wine, I mainly buy wines above $20, not the big volume, lower priced brands
I look to Australia mainly for Shiraz; for other varieties, I tend to buy from other countries
I am intrigued by the different regions and appellations of Australia
Australian wines offer a lot of flavor for the money
(Statements rotate)

“Wine Opinions”

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