



“ **Wine Opinions** ”

Wine Australia Trade Survey Report

April 15th, 2023

INTRODUCTION

On behalf of Wine Australia, Wine Opinions has begun a four-year project to provide baselines of the current market position of Australian wines in the U.S. and investigate opportunities to grow Australian wine share of market. This report details the results of the Year 1 survey of members of the U.S. wine trade.

The primary objectives of the study were as follows:

- *Measure trade engagement with the U.S. market promotional campaigns of Australia and leading competitor countries.*
- *Evaluate the importance of a variety of wine campaign promotional initiatives.*
- *Measure the levels of interest among members of the trade in adding to their portfolios wines with lower alcohol levels, lower calories/carbohydrates, and related “better for you” features.*
- *Detail trade views of the importance of organic or sustainable certifications and labeling.*
- *Compare the current sales of Australian wine (over and under \$20) to their “pre-COVID” 2019 levels.*
- *Set baseline trade evaluations of the “quality for the price” of red and white Australian wines selling at retail under \$20; \$20-\$30; and over \$30.*

- *Explore growth potential for the leading varietal types of Australian wine priced over \$20.*
- *Compare trade levels of familiarity with each of the major Australian wine growing regions to the baselines set in the 2019 Wine Australia trade survey.*
- *Determine the most critical factors for new portfolio additions and the Australian regions/varietals of most interest.*
- *Establish trade usage of the leading e-commerce or trade press websites.*

Methodology

There were 443 survey respondents. Results were calculated at a confidence level of 90%. Confidence intervals for the total sample were $\pm 2.3\%$ to $\pm 3.9\%$. In some cases, rows or columns of figures do not add to 100% due to rounding.

Reporting is based on analysis and comparisons of the relevant tiers of the trade.

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

KEY TAKEAWAYS

- **“In-Person” Importance:** Every promotional campaign activity considered by half or more survey respondents to be “very important” was an in-person event or experience. While this sentiment does not negate the benefits of social media campaigns, information downloads from campaign websites, and other such initiatives, it is a strong indication that the wine trade has put the pandemic in the rear-view mirror and is literally embracing personal interactions with their peers.
- **Campaign Engagement:** The Wine Australia campaign was rated at or near the top among campaigns in terms of its social media initiatives, email newsletter, and POS materials.
- **Quality for Price Perceptions:** For both red and white Australian wines, trade perceptions of “quality for the price” jump significantly for wines priced at or above \$20, in comparison to wines priced below \$20.
- **Growth Potential:** Survey respondents saw the greatest growth potential for Australian wines to be in red blends, Cabernet Sauvignon, and (to a slightly lesser extent) sparkling wines and Shiraz. The optimum price points for growth of these types of Australian wines were seen as \$20 - \$25. Sparkling wine from Australia was seen to have significantly higher growth potential than either Chardonnay or Riesling.
- **Region/Varietal Interest:** Of the “pairs” of wine types and Australian regions selling at or above \$20, survey respondents showed the greatest interest in Cabernet Sauvignon from Margaret River or Coonawarra and Shiraz from Barossa or McLaren Vale.

RESPONDENT PROFILES

Survey respondents were fairly evenly divided across tiers of the wine trade.

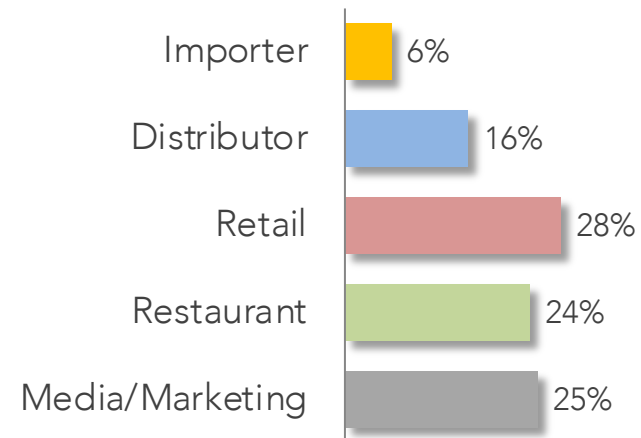
The small percentage of importers reflects the fact that importers who also have distributor licenses were assigned to the distributor category for analysis.

The “media/marketing” segment includes academics and wine educators, as well as those in the media and in marketing or public relations.

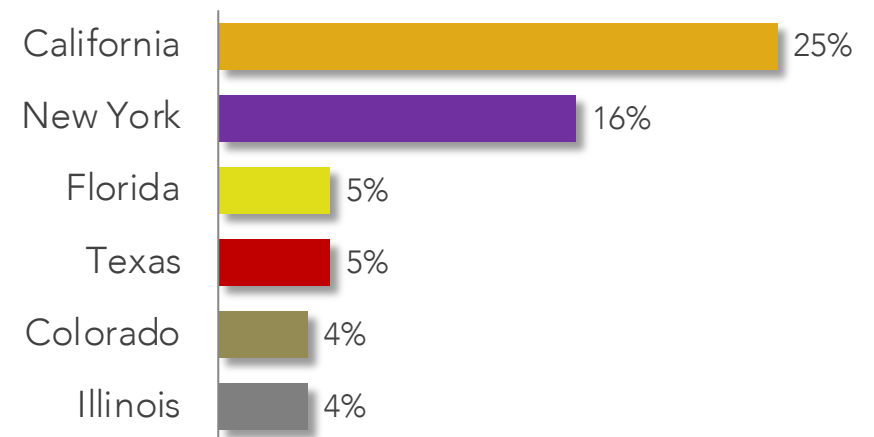
As always in trade market research, the largest percentage of respondents were from California, followed by New York. Adding New Jersey to the “New York metropolitan area” would bring the New York share of respondents to 19%.

Looking at just the retail tier of the trade, there were slightly more respondents from New York than California, while the numbers of respondents in the restaurant and distributor trade tiers were greater in California than New York.

Trade Tiers



Top States



VALUE OF PROMOTIONAL CAMPAIGN ELEMENTS

Respondents were shown a list of the types of activity, information, and initiatives most often offered to the trade by country and regional promotional campaigns. They were asked to rate the degree of importance to them of each type of initiative.

The chart at right shows the percentage of respondents rating each initiative as “very important” to them.

Information and downloads from campaign websites were seen as “very important” more often by distributors (44%) and the restaurant trade (40%) than off-premise retailers (30%).

Social media campaigns aimed at consumers were seen as “very important” significantly more often by distributors than any other tier of the trade.

All of the top-rated campaign elements were “in person” activities.

Every one of the listed campaign elements except for walk-around tastings, webinars, and master classes were rated as “very important” significantly more often by respondents who are involved with the Wine Australia campaign, in comparison to those who are not.

“Very Important” Initiatives

<i>Email newsletters that are informational</i>	19%
<i>Information and downloads from the campaign website</i>	37%
<i>Social media campaigns reaching the trade</i>	23%
<i>Display maps of the wine regions and related promotional materials</i>	40%
<i>Advertising in trade publications (print or online)</i>	13%
<i>Advertising in consumer publications (print or online)</i>	19%
<i>Visits to key accounts by winemakers from the region</i>	62%
<i>In-person “walkaround” trade tastings</i>	64%
<i>Webinars with winemakers</i>	26%
<i>In-person masterclasses</i>	47%
<i>Trade trips to the region</i>	64%

CAMPAIGN ENGAGEMENT

Respondents were asked to indicate their experience and involvement with the U.S. promotional campaigns of the competitor regions.

In line with their larger share of the imported wine market overall, trade event attendance was especially strong for Italy and France. Spain stood alone after Italy and France, well above the “New World” countries in terms of trade event attendance.

Online webinars and master class attendance also skewed slightly to the “Old World” countries.

The “Old World” counties’ dominance of attendance may reflect the fact that these countries have multiple regions which are independently active in the U.S. market.

Email newsletter subscriptions were highest for Australia, driven by subscriptions among importers and distributors.

Social media engagement was strong among all competitor countries, especially New Zealand, Argentina, Australia, and Italy. For most of these countries, including Australia, social media engagement was highest among distributors.

As with most other country campaigns, engagement with Wine Australia events skewed to email newsletters and social media followers. Australia stood out in newsletter engagement, especially among distributors and importers.

	Italy	France	Spain	Argentina	Australia	Chile	New Zealand
Attended a trade event in person	58%	55%	42%	28%	23%	27%	19%
Attended a webinar or master class online	28%	29%	26%	16%	21%	16%	19%
Get their email newsletter	45%	47%	47%	41%	52%	45%	43%
Follow them on social media	50%	53%	50%	54%	53%	49%	56%

CAMPAIGN DIRECT EXPERIENCE

Respondents were asked to indicate any direct experience they had with the country campaigns in the past 12 months.

Sizeable majorities had used POS material from every campaign. POS usage was highest by the distributor and retail tiers of the trade, as would be expected.

Italy stood out as the country with the lowest usage of POS materials, followed by France. Usage of POS materials from New Zealand and Australia were very slightly higher than Argentina, Chile, and Spain. Every respondent working for a distributor of Australian wine indicated usage of Wine Australia campaign POS

materials.

Participation in cooperative promotions was generally low across campaigns.

Trade trip participation was highest for Italy and France, with Spain just behind. As seen in previous research on this subject, trade trips to “New World” countries were reported by only single digits.

The sample size of those making trade trips was too small to determine any significant skews or patterns in trade trip attendance between the tiers of the trade.

	Italy	France	Spain	Argentina	Australia	Chile	New Zealand
Have used POS materials	68%	76%	80%	83%	85%	82%	86%
Participated in a cooperative promotion	36%	28%	24%	24%	21%	24%	21%
Went on trade trip to region	20%	18%	13%	4%	5%	5%	2%

SALES/REPRESENTATION OF WINES OVER \$20

Respondents in the importer, distributor, restaurant, and retail tiers of the trade were asked to indicate whether their companies sold wines of each competitor country that are priced over \$20. Only 7% of respondents' companies do not carry such wines.

Italy and France were by far the most universally represented at respondent companies, followed by Spain. Nearly all retailers reported carrying wines of Italy and France (97% each). Spain followed with 94% of retailers.

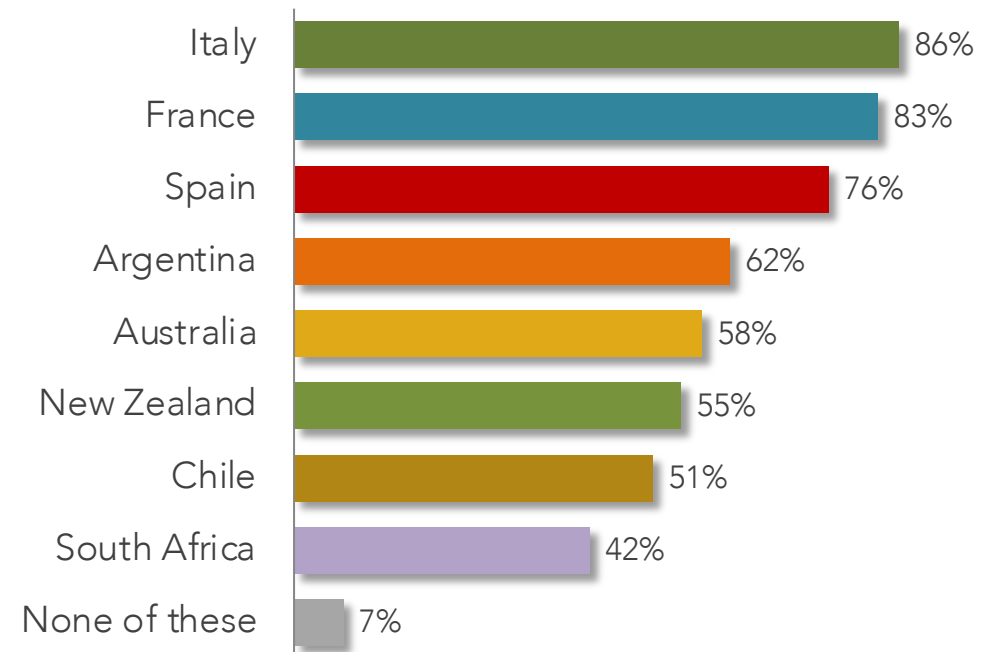
On-premise representation by country also skewed heavily to Italy (82%) and France (80%), followed by Spain (67%).

Australian wines that retail for over \$20 were carried by 19% of respondent importers, 57% of distributors, 54% of on-premise accounts, and 77% of retailers.

Of the 170 respondents whose companies carry Australian wines selling over \$20, 136 of them also indicated selling Australian wines that are priced over \$30.

Those members of the trade who sell Australian wines over \$30 were much more likely to sell New World wines over \$20 in general, ranging from South Africa (64%) to Argentina (83%). This suggests there may be a segment of the trade that is more accepting or tuned into to the New World at the higher end of the market.

Carry Wines Over \$20



INTEREST IN “BETTER FOR YOU” WINES

Respondents were shown a list of benefits associated with the emerging “better for you” category and asked to state their level of interest in adding to their sales portfolios wines with each feature.

In terms of alcohol content, a plurality favored the modest alcohol level of 7% - 9%. Nearly 1 in 4 had high interest in “zero” alcohol wines. Zero alcohol wines were especially of interest to the retailer tier of the trade (35%). Fewer favored wines with alcohol levels between the two ends of the spectrum.

High interest in the 7% - 9% alcohol level was indicated by 29% of all respondents. A somewhat greater percentage of those involved with the Australian wine campaign (36%) had high interest in 7% - 9% alcohol wines.

Wines designated as vegan were also of notable interest to the trade. They were of high interest to 26% of both retail and restaurant respondents, and 27% of those who sell Australian wine. It is notable that among all tested attributes, “vegan” was the one where the appeal to the on-premise trade tier was equal to that among the off-premise trade and distributors.

Wines offering lower calories and carbohydrates were of high interest to 24% of respondents in the retail tier of the trade.

*Degree of Interest
(Ratings of 4/5)*

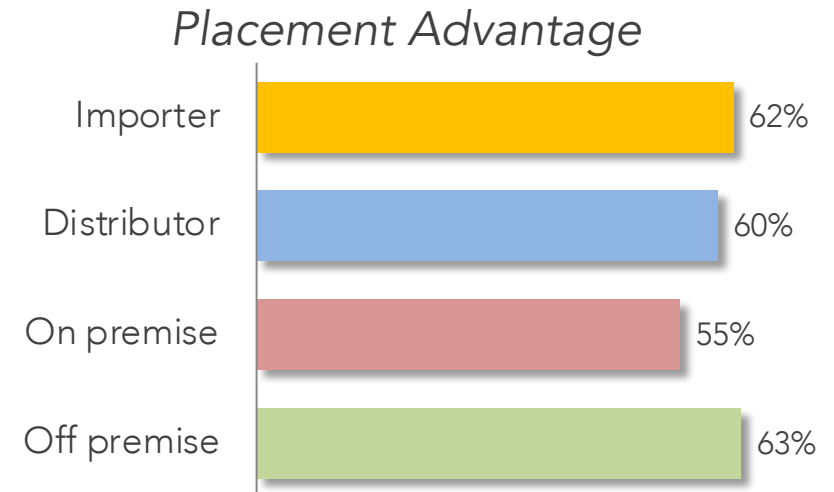
Alcohol 7% - 9%	29%
Alcohol below 7%	16%
Zero alcohol	23%
Low calories/carbohydrates	15%
Vegan	25%
Low sugar content	19%

INTEREST IN ADDING ORGANIC WINES

Asked to evaluate the advantage in gaining new shelf or wine list placement that wines made from organic grapes might have, 60% of all respondents rated such wines to have a “good” or “great” advantage (ratings of “4” or “5” on the 5-point scale).

Higher (but not statistically significant) ratings were given by importers and retailers, as well as respondents whose companies are involved with the Wine Australia campaign (62%).

It is worth noting that the percentage of respondents with negative perceptions of wines made from organic grapes (“1” or “2” on the 5-point scale) was very small, ranging from 12% to 19% among the trade tiers.



SUSTAINABLE PRODUCTION STATEMENTS

Respondents were shown three alternatives for identifying sustainably produced Australian wines on their front or back labels:

- A statement that the wine is “Sustainably produced” on the front or back label
- A statement of “Certified sustainable” production on the front or back label
- A logo or “Trustmark” on the front or back label indicating certification of sustainable production

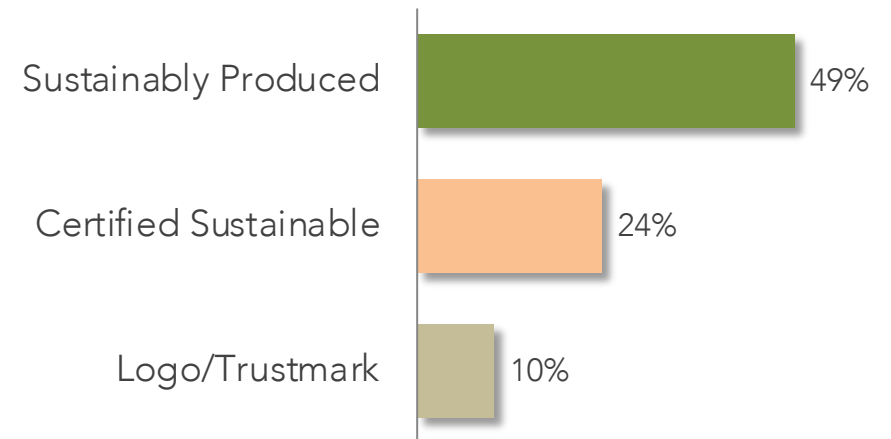
After exposure to the three alternatives, respondents were asked to rank them in order of their marketing value.

“Sustainably Produced” was the clear favorite, being ranked first by 57% of distributors, 49% of the on-premise trade, and 49% of retailers.

The “Certified Sustainable” statement was preferred by more importers and the on-premise trade than the other trade tiers.

It should also be kept in mind that this question asked for an assessment of the marketing value of the alternative statements, and not personal preference.

*Statement Preference
(Ranked First)*



SALES COMPARISON TO 2019

Respondents in the importer, distributor, on-premise, and off-premise tiers of the trade were asked to indicate whether their sales of all domestic and imported wines (measured in dollars) had increased, decreased, or stayed the same in comparison to sales levels recorded in 2019.

In total, the percentage of respondents reporting increased sales outweighed those reporting decreases by 11%.

The percentage of respondents reporting decreased sales of Australian wines selling at the retail equivalent of under \$20 was a net 12% greater than the percentage reporting increased sales of under-\$20 Australian wines.

Reported sales of Australian wines that sell for over \$20 were unchanged in dollar sales volume compared to 2019.

Net Change in Dollars 2019 vs. Present

Total Sales (Domestic and Imported)	
<i>Increased</i>	30%
<i>About the same</i>	42%
<i>Decreased</i>	19%
<i>Don't know or not sure</i>	9%
Australian Wines Under \$20	
<i>Increased</i>	13%
<i>About the same</i>	52%
<i>Decreased</i>	25%
<i>Don't know or not sure</i>	10%
Australian Wines Over \$20	
<i>Increased</i>	22%
<i>About the same</i>	47%
<i>Decreased</i>	22%
<i>Don't know or not sure</i>	9%

Base size 190 – 193 total respondents

AUSTRALIAN WINE STOCK LEVELS

Respondents whose companies sell Australian wines were asked to list the number of Australian wine SKUs their companies carried, by price segment. Those in the on-premise trade were asked to base their answers on the “retail equivalent” price, and not their wine list by-the-bottle prices.

For Australian wines selling at retail under \$20, three-quarters of restaurant accounts stocked 1-4 SKUs. Retail trade respondents’ stock levels of under-\$20 Australian wines was evenly spread, presumably based on total SKU size of the account.

On-premise accounts’ representation of Australian wines in the \$20-\$25 price range was similar to that of under-\$20 wines, with a significant majority stocking 1-4 SKUs.

There was a significant decline in the percentage of retailers carrying more than 10 SKUs of Australian wine at prices over \$20 (compared to the percentage carrying more than 10 SKUs of Australian wine under \$20). While 46% carried more than 10 SKUs of the under-\$20 wines, only 26% carried more than 10 SKUs of \$20 - \$25 Australian wines.

Under \$20

SKUs	Restaurant*	Retailer
1 - 4	76%	33%
5 - 10	9%	21%
11 - 20	3%	26%
21+	12%	20%

*Caution, small base: n=34

\$20 - \$25

SKUs	Restaurant*	Retailer
1 - 4	71%	38%
5 - 10	14%	36%
11 - 20	6%	17%
21+	9%	8%

*Caution, small base: n=35

AUSTRALIAN WINE STOCK LEVELS (continued)

Among on-premise respondents, the pattern of carrying Australian wines at prices over \$20 (retail equivalent) continued through the higher price segments: a preponderance carry 1-4 SKUs and few carry more than 4 Australian wine SKUs in the higher price segments.

Likewise, there was a moderate but significant drop in the percentage of Australian wine SKUs carried by retailers once the price range reached \$30.

\$25 - \$30

SKUs	Restaurant*	Retailer
1 - 4	79%	56%
5 - 10	7%	26%
11 - 20	7%	12%
21+	7%	6%

*Caution, small base: n=29

\$30 - \$40

SKUs	Restaurant*	Retailer
1 - 4	80%	64%
5 - 10	10%	26%
11 - 20	3%	3%
21+	7%	7%

*Caution, small base: n=30

\$40 or More

SKUs	Restaurant*	Retailer
1 - 4	63%	71%
5 - 10	21%	20%
11 - 20	8%	1%
21+	8%	7%

*Caution, small base: n=38

AUSTRALIAN WINE QUALITY PERCEPTIONS

Survey respondents were asked to estimate the price/quality ratio (QPR) of red and white wines from Australia selling in the price ranges of under \$20, \$20 - \$30, and \$30 or more. Ratings were on a 7-point scale where 7 means “very best quality for the price” and 1 means “very worst quality for the price.” Respondents could also choose “Don’t know, or no opinion” for each wine color/price segment.

For white wines, there was a distinct jump in QPR perceptions across trade tiers when the price moves into the \$20 - \$30 category. For red wines, the jump in quality for price perceptions was even greater (in both the step up from under \$20 to \$20 - \$30 and the step up to \$30 or more).

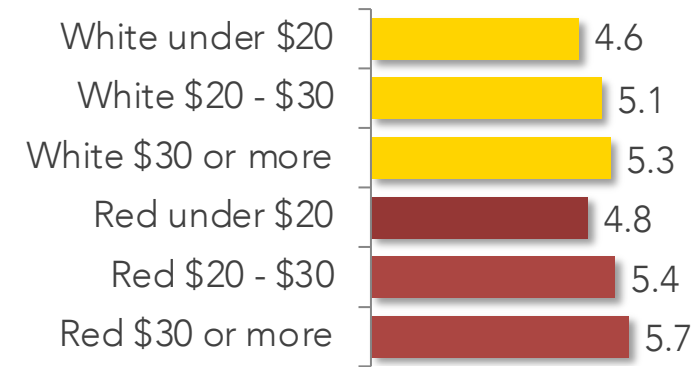
QPR ratings of Australian red wines in the \$20 - \$30 price segment were highest among importers, while distributors gave slightly higher QPR ratings than the other trade tiers for Australian white wines in the \$20 - \$30 price segment.

Importers also gave the highest QPR ratings to Australian red wines in the \$30 or more segment (as did those in the media/PR/marketing trade tier).

For Australian white wines selling at \$30 or more,

distributors and the media/PR/marketing trade tier gave the highest QPR ratings.

Australian Wine QPR Ratings – All Respondents



QPR Ratings by Trade Tier

	IMPORTER	DISTRIBUTOR	ON PREMISE	OFF PREMISE	MEDIA MARKETING
White under \$20	4.6	4.9	4.5	4.6	4.6
White \$20 - \$30	5.1	5.3	5.1	5.1	5.1
White \$30 or more	5.1	5.5	5.3	5.0	5.5
Red under \$20	4.7	5.0	4.6	4.8	4.8
Red \$20 - \$30	5.7	5.4	5.2	5.5	5.4
Red \$30 or more	5.8	5.7	5.5	5.6	5.8

GROWTH POTENTIAL FOR AUSTRALIAN VARIETALS

Respondents were shown a list of the leading varietal types of Australian wine. They were asked to evaluate the growth potential on the U.S. market of each type, assuming retail prices of \$20 or more. The rating scale consisted of “no growth,” “a little growth,” “good growth,” or “great growth.”

The chart at right shows the “good” or “great” responses for each type of wine.

Red blends and Cabernet Sauvignon were seen by more than half of survey respondents as having the most growth potential. Distributors gave the highest rating to Cabernet Sauvignon, while retailers were most optimistic about the growth potential of Red Blend wines.

Those in the restaurant tier saw the greatest growth potential in Red Blends, followed closely by Cabernet Sauvignon.

Growth potential of Shiraz was rated highest by those in the on-premise trade tier.

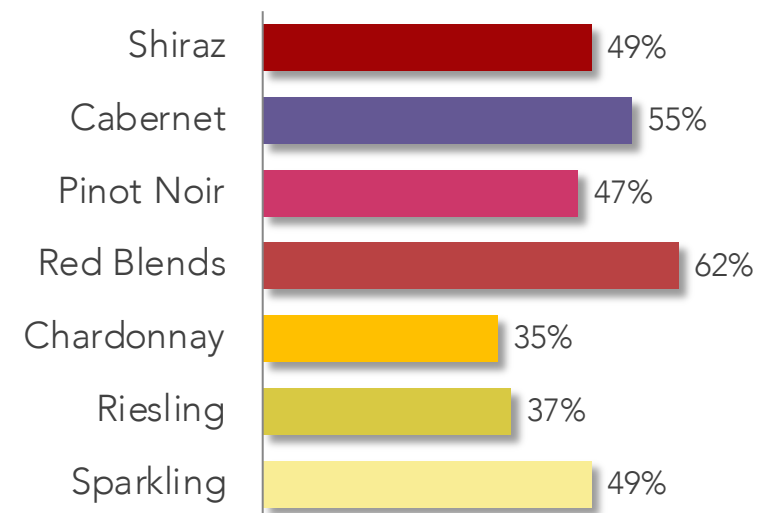
For the white wine varieties, especially sparkling wines, the on-premise trade was also most optimistic.

Respondents were also asked to enter the name of any other varietal wine grown in Australia which they considered to have “good” or “great” growth potential. Grenache (entered by 23%), followed by Semillon (22%),

and Sauvignon Blanc (21%) were the only varieties with a significant number of mentions.

It is noteworthy that, other than Chardonnay and Riesling, there were not large differences between varieties in the trade’s assessment of their potential. This may suggest that the image of Australia as a whole is more influential than the individual variety or the notion of particular Australian specialties or weaknesses. It may also be a reflection of the fact that Chardonnay and Riesling are generally not seen by the trade as having growth potential, regardless of where they are produced.

“Good” or “Great” Growth Potential



POTENTIAL OF WINE TYPES BY PRICE SEGMENT

For every varietal type tested, a plurality of survey respondents saw the greatest potential for growth to be in the \$20 - \$25 price segment of the U.S. market.

For Pinot Noir, nearly as many respondents saw growth opportunity in the \$25 - \$30 price segment. In contrast, almost one in three saw growth potential for Australian Riesling in the under-\$20 price tier.

Growth opportunities in price segments over \$30 were seen by 32% of respondents for Cabernet Sauvignon, and by 28% for Pinot Noir.

Just as Australia overall overshadowed the outlook for individual varieties, in this question it appears that optimism about the \$20-\$25 and \$25-\$30 price segments was more influential than differences between varieties.

On-premise respondents were consistently less positive than off-premise for wines under \$20.

Growth Potential of Australian Wine Types by Price Category

Wine Type	< \$20	\$20-\$25	\$25-\$30	\$30-\$40	\$40+
Shiraz	18%	35%	26%	13%	7%
Cabernet Sauvignon	13%	30%	24%	20%	12%
Pinot Noir	11%	32%	30%	18%	10%
Red Blends	25%	34%	27%	12%	2%
Chardonnay	18%	41%	27%	10%	5%
Riesling	30%	45%	17%	7%	1%
Sparkling	16%	37%	25%	16%	6%

AUSTRALIAN WINE REGION FAMILIARITY

The survey measured degrees of familiarity and sales of wines from 12 Australian producing regions.

As in 2019, Barossa Valley was the best-known region. Barossa Valley and McLaren Vale were the only two regions that are sold by more than half of survey respondent companies.

The least familiar among regions was Mornington Peninsula, which was not familiar to nearly half (48%) of respondents.

Tasmania stood out as just over half of respondents (52%) expressed a degree of familiarity with the region, but their companies do not sell its wine.

There was little variation in the percentages of respondents checking “very familiar and sell” for each region in this survey compared to the results of the 2019 trade survey.

Wine Region Familiarity and Sales

	VERY FAMILIAR AND DO SELL	SOMEWHAT FAMILIAR AND DO SELL	SOMEWHAT FAMILIAR AND DON'T SELL	NOT FAMILIAR
Barossa Valley	42%	19%	35%	4%
McLaren Vale	33%	22%	38%	7%
Margaret River	22%	25%	43%	10%
Coonawarra	22%	23%	46%	9%
Clare Valley	22%	24%	45%	10%
Yarra Valley	19%	26%	48%	7%
Hunter Valley	18%	23%	48%	11%
Adelaide Hills	18%	27%	45%	10%
Tasmania	13%	17%	52%	18%
Limestone Coast	7%	15%	40%	39%
Mornington Peninsula	4%	8%	39%	48%
Langhorne Creek	4%	12%	41%	43%

PORTFOLIO ADDITION FACTORS

Survey respondents in the importer, distributor, on-premise and off-premise trade tiers were asked to consider a number of statements that might enter into a decision to make a new portfolio addition of a wine that would sell for \$20 - \$40.

The chart at right shows the statements and the percentages of respondents rating each statement as either “somewhat” or “very” important to making the decision to add a new wine to their sales portfolios.

Respondents rated finding a wine to fill a gap in their portfolio as the most important factor.

Also of high importance were the quality reputation of the wine’s region of production of its varietal type; having a consistent supply of the wine; and personally liking the wine.

Critic ratings or scores, and “having a consistent supply” were of more importance to importers and distributors than retailers and the on-premise trade.

Consistent supply was of significantly higher importance to importers and distributors (92% vs. 76% for other respondents); as was filling a gap in the

portfolio (94% vs. 83%). Personal preferences were most important to on-premise respondents.

Decision Factors for Portfolio Additions (Somewhat/Very Important)

The appellation of origin	77%
Score/rating from respected wine critic	55%
Produced by certified sustainable winery	60%
Region known for quality of varietal type	85%
Wine is in a growth category	66%
There is a consistent supply of the wine	81%
Wine is made from organic grapes	60%
Promotional support from trade association or producer	65%
You personally like the wine	84%
The wine fills a gap in your portfolio	87%

REGION/VARIETAL APPEAL

Survey respondents in the importer, distributor, on-premise and off-premise trade tiers were shown six Australian wine regions and the varietal type of wine most closely associated with each region. They were asked to state their level of interest in such wines that would sell on the U.S. market for \$20 or more.

The table at right shows the percentage of respondents giving ratings of “6” or “7” on a 7-point scale where “7” meant “great interest.”

The Shiraz and Cabernet Sauvignon regional wines were of greatest interest to respondents. Retailers were the most enthusiastic about these wines/regions, with 56% giving 6/7 ratings to Barossa or McLaren Vale Shiraz and 52% giving 6/7 ratings to Margaret River or Coonawarra Cabernet Sauvignon. Red blends were also of greater appeal to the retail trade than those in the on-premise tier.

Pinot Noir from Yarra Valley or Adelaide Hills was favored by the on-premise trade (45% giving 6/7 ratings, vs. 35% of retailers and 32% of distributors).

Decision Factors for Portfolio Additions (Ratings of 6/7 on a 7-point scale)

Shiraz from Barossa or McLaren Vale	44%
Cabernet Sauvignon from Margaret River or Coonawarra	45%
Chardonnay from Margaret River, Yarra Valley, or Adelaide Hills	35%
Pinot Noir from Yarra Valley or Adelaide Hills	37%
Sparkling wine from Tasmania or Adelaide Hills	40%
Red blends from any region	38%

INTEREST IN ONLINE PUBLICATIONS

All respondents were shown a list of e-commerce or wine interest publication sites. They were asked to indicate which of these they visit on a weekly or more often basis.

More than half of respondents make weekly or more often visits to wine-searcher, Wine Spectator, SevenFifty (or Provi), and Wine Enthusiast.

Wine-searcher is most often visited by importers and distributors. Wine Spectator and Wine Enthusiast are significantly more often visited by retailers than those in the on-premise trade. Decanter is most popular with distributors.

Websites that are visited weekly or more often by less than 10% of respondents include the following:

now.breakthrubev.com

jebdunnuck.com

libdib.com

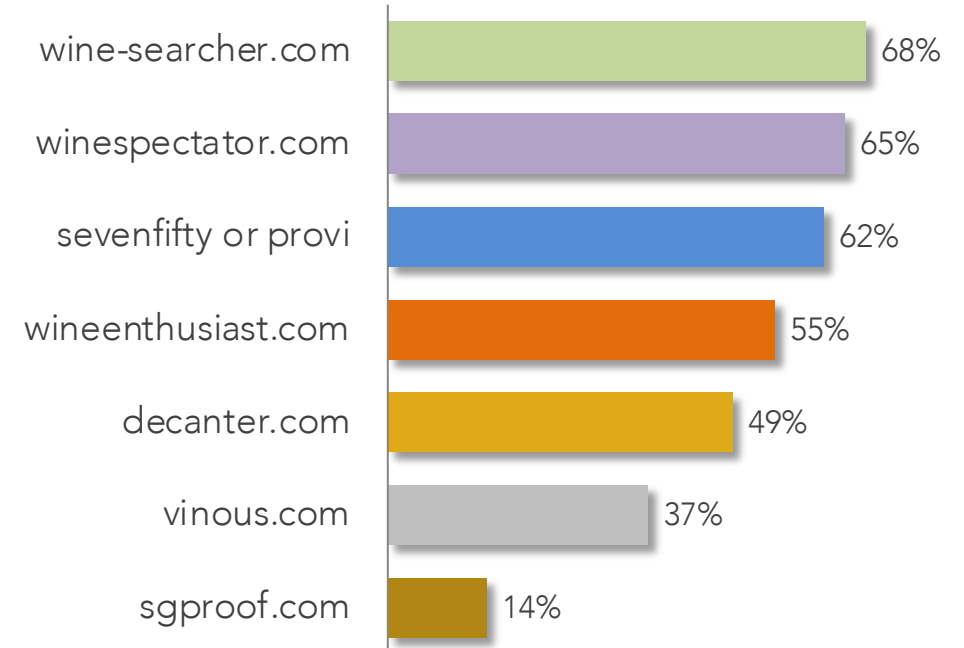
winebusiness.com

robertparker.com

jancisrobinson.com

cellartracker.com

Websites of Interest



Appendix

SURVEY QUESTIONNAIRE

1. Please indicate which of the categories below best describes where you work.

- Grape grower, vineyard management or related field *(Disqualifies)*
- Wine producer (or working directly for a wine producer) *(Disqualifies)*
- Wine trade or regional association *(Disqualifies)*
- Wine importer (or working directly for a wine importer)
- Company that both imports and distributes wine
- Distributor, wholesaler, broker or related field
- Restaurant, hotel, or hospitality industry
- Wine retailer, retail sales, administration or related field
- Wine media, educator, academic, or related field
- Public relations, marketing, or retail/restaurant consultant
- Other wine industry field (please enter) *(Open-ended text box)*

2. In what state is your company or place of employment located *(Drop-down menu; Canada and “other” disqualifies)*

3. Of all the kinds of things that campaigns promoting wine regions do, what importance do you attach to each of the promotional initiatives listed below?

Not important at all	Not very important	Somewhat important	Very important
Email newsletters Information and downloads from regional websites Social media campaigns for the trade Social media campaigns reaching consumers Display maps of regions Advertising in trade publications Advertising in consumer publications		Visits to key accounts by winemakers from the region In-person “walk-around” trade tastings Webinars with winemakers In-person master classes Trade trips to the region <i>(Factors rotate)</i>	

SURVEY QUESTIONNAIRE

4. In the past year, which (if any) of the following activities related to the countries listed below have you participated in or experienced? Please check any/all that apply.

Attended a trade event in person	Attended a webinar or master class online	Get their email newsletter	Follow them on social media
----------------------------------	---	----------------------------	-----------------------------

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

5. In the past year, what direct experience (if any) have you had with the trade associations of the wine regions below? Please check any/all that apply.

Have used POS materials	Participated in a cooperative promotion	Went on a trade trip to the region
-------------------------	---	------------------------------------

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

SURVEY QUESTIONNAIRE

6. If your company or place of business sells or represents wines from any of the following countries that are sold at retail for \$20 or more, please indicate by checking that country. If your company does not sell or represent wines that retail for \$20 or more from any of these countries, please choose “none” from the bottom of the list.

Australia
France
Spain
Italy
Chile
Argentina
South Africa
New Zealand
None of the above

(Rows rotate except for last row)

7. What is your degree of interest in adding to your portfolio wines with the features listed below? On the 5-point scale, "1" mean "no interest at all," and "5" means "very high interest."

1 – No interest at all	2	3	4	5 – Very high interest
------------------------	---	---	---	------------------------

Alcohol level of 7%, 8%, or 9% ABV
Alcohol level below 7%
Zero alcohol
Low calories and carbohydrates
Vegan
Low sugar content

SURVEY QUESTIONNAIRE

8. In your opinion, what advantage (if any) do you believe imported wines labeled as being made from organically grown grapes have in terms of gaining new shelf or wine list placements? On a 5-point scale where "1" means "no advantage at all," and "5" means "great advantage," please check a degree of advantage for each certification or claim. *(Multiple choice)*

- 1 - No advantage
- 2
- 3
- 4
- 5 - Great advantage

9. Does your company sell or represent wines from Australia?

- Yes
- No *(Skip to Q13)*

10. How many individual wines or SKUs of Australian wine in each retail price range listed below do you carry, sell or represent at this time? If you are in the on-premise trade, please base your answers on the "retail equivalent" price ranges and include any wines that are sold by the glass only.

Under \$20	\$20 - \$25	\$25 - \$30	\$30 - \$40	\$40 or more
------------	-------------	-------------	-------------	--------------

- 1 – 4
- 5 – 10
- 11 – 20
- 20 – 50
- More than 50

SURVEY QUESTIONNAIRE

11. Thinking of the Australian wines you sell that are sustainably produced, please rank the value of the factors listed below. *(Ranking scale from 1 to 3)*

A statement that the wine is "Sustainably produced" on the front or back label

A statement of "Certified sustainable" production on the front or back label

A logo or "Trustmark" on the front or back label indicating certification of sustainable production

(Rows rotate)

12. Compared to 2019, how have your company's total wine sales, and your portfolio and sales of Australian wines changed? *(Multiple choice rows)*

Don't know or not sure	Decreased	About the same	Increased
------------------------	-----------	----------------	-----------

Total sales in dollars of domestic and imported wines

Sales of Australian wines priced under \$20 (retail equivalent)

Sales of Australian wines priced over \$20 (retail equivalent)

Total number of Australian wine SKUs carried

SURVEY QUESTIONNAIRE

13. Thinking of both RED and WHITE wines from Australia selling in the price range of Under \$20 (750ml bottle at retail) please indicate your opinion of the PRICE/QUALITY ratio of these wines. On the scale of 1 to 7, “7” means the very best quality for the price (value) and “1” means the very worst quality for the price (value). If you don’t know or have no opinion, please select that choice for any wine type that applies.

Don't know or no opinion	1	2	3	4	5	6	7 – Very best value
-----------------------------	---	---	---	---	---	---	------------------------

Red wines from Australia
White wines from Australia

14. Thinking of both RED and WHITE wines from Australia selling in the \$20 - \$30 price range (750ml bottle at retail) please indicate your opinion of the PRICE/QUALITY ratio of these wines. On the scale of 1 to 7, “7” means the very best quality for the price (value) and “1” means the very worst quality for the price (value). If you don’t know or have no opinion, please select that choice for any wine type that applies.

Don't know or no opinion	1	2	3	4	5	6	7 – Very best value
-----------------------------	---	---	---	---	---	---	------------------------

Red wines from Australia
White wines from Australia

SURVEY QUESTIONNAIRE

15. Thinking of both RED and WHITE wines from Australia selling in the price range of \$30 or more (750ml bottle at retail) please indicate your opinion of the PRICE/QUALITY ratio of these wines. On the scale of 1 to 7, “7” means the very best quality for the price (value) and “1” means the very worst quality for the price (value). If you don’t know or have no opinion, please select that choice for any wine type that applies.

Don't know or no opinion	1	2	3	4	5	6	7 – Very best value
--------------------------	---	---	---	---	---	---	---------------------

Red wines from Australia
White wines from Australia

16. What is your opinion of the growth potential on the U.S. market for Australian wines of the following varieties or types that sell at retail for \$20 or more? If you don’t know or have no opinion for a particular variety, please choose that response.

Don't know or no opinion	No growth potential	A little growth potential	Good growth potential	Great growth potential
--------------------------	---------------------	---------------------------	-----------------------	------------------------

Shiraz
Cabernet Sauvignon
Pinot Noir
Red blends (“GSM” or other)
Chardonnay
Riesling
Sparkling
(Grape varieties rotate)

SURVEY QUESTIONNAIRE

17. Are there other Australian wine beyond those listed in the question above that you believe have “Great” or “Good” growth potential? If so, please enter the varieties, appellations, types, or styles of those wines in the text boxes below. You may enter up to three wine appellations, types, or styles. If none apply, or you may skip this question. *(Three open-ended text boxes)*

At this point, respondents who checked “Good” or “Great” growth potential for any variety (or varieties) in Q16 sees those varietal names as answer rows in Q18.

18. You indicated that you believe that the following Australian wine varieties or types have positive growth potential. For each variety of wine listed below, please check the retail price range in which you believe that variety has the most growth potential.

Under \$20	\$20 - \$25	\$25 - \$30	\$30 - \$40	\$40 or more
------------	-------------	-------------	-------------	--------------

(Respondents see the wine types they rated “Good” or “Great” for growth potential in Q16)

SURVEY QUESTIONNAIRE

19. Please indicate your level of familiarity with the following Australian wine regions and their wines.

Not familiar with these wines	Somewhat familiar, my business DOES NOT sell or represent them	Somewhat familiar, my business DOES represent them	Very familiar, my business DOES sell or represent them
-------------------------------	---	---	---

Hunter Valley
 Barossa Valley
 McLaren Vale
 Clare Valley
 Yarra Valley
 Margaret River
 Adelaide Hills
 Coonawarra
 Tasmania
 Langhorne Creek
 Limestone Coast
 Mornington Peninsula
 (Regions rotate)

SURVEY QUESTIONNAIRE

At this point, those who indicated in Q2 that they work in the “media, academic...” or “PR, marketing...” fields are skipped to Q22.

20. Please rate the importance of the factors listed below when making the decision to add to your portfolio a new imported wine that would sell at retail in the range of \$20 - \$40.

Not important at all	Not very important	Neutral or not sure	Somewhat important	Very important
----------------------	--------------------	---------------------	--------------------	----------------

The appellation of origin

Score or rating from a respected wine critic

The wine was produced by a winery certified for its sustainable practices

The region of production is known for producing quality wines of the type you are considering

The wine is in a category that is already showing growth on the market

There is a consistent supply of the wine

The wine is made from organically grown grapes

Promotional support from the producer or a trade association

You personally like the wine

That the wine is of a type, from a region, and/or in a price segment that fills a gap in your portfolio

Other (Please describe)

(Factors rotate except for “other”)

SURVEY QUESTIONNAIRE

21. Thinking of new wines from Australia that would sell at retail for over \$20 on the U.S. market, what level of interest would you (or your company) have for the wine types coming from the regions listed below? On a 7-point scale, “7” means “Great interest in selling this wine from this region,” and “1” means “No interest at all in this wine from this region.” For purpose of rating your interest, assume that the wine quality is appropriate for its price.

Don't know or no opinion	1- No interest	2	3	4	5	6	7 – Great interest
--------------------------	----------------	---	---	---	---	---	--------------------

Shiraz – Barossa or McLaren Vale

Cabernet Sauvignon – Margaret River or Coonawarra

Chardonnay – Margaret River, Yarra Valley, or Adelaide Hills

Pinot Noir – Yarra Valley or Adelaide Hills

Sparkling – Tasmania or Adelaide Hills

Red blends – From any region

22. Please check any of the e-commerce or publication sites listed below that you visit weekly or more often.

sevenfifty.com (or provi.com)

libdib.com

vinous.com

now.breakthrubev.com

sgproof.com

wine-searcher.com

winespectator.com

decanter.com

wineenthusiast.com

Other - please describe (*Open-ended text box*)

(*Rows rotate, except for last row*)



“ **Wine Opinions** ”

P.O. BOX 231 • SARATOGA SPRINGS, NY 12866 • (707) 815-9463
INFO@WINEOPINIONS.COM • WWW.WINEOPINIONS.COM