U.S. Wine Consumer Survey Report for Wine Australia

July 5th, 2019

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INTRODUCTION

Wine Australia engaged Wine Opinions to conduct a series of trade and consumer research initiatives on the U.S. wine market for a 5-year period from 2015 through 2019.

The research conducted in 2019 was comprised of both trade and consumer quantitative online surveys of perceptions, attitudes, purchase and usage behaviors, and trends regarding Australian wines. The 2019 findings are compared to an earlier round of Wine Opinions research where questions are comparable.

This report summarizes the findings of the consumer survey.

Objectives

The primary objective of the consumer research was to evaluate responses to the newly evolved strategy of the campaign, which places a focus on selected wine varieties and the specific Australian producing regions that best align with each. These are wines selling mainly at price points at or just above $15, the price segment seeing growth through the current U.S. market trend of “premiumization.”

A secondary objective was to compare consumer attitudes and behaviors on key wine choice and purchase issues first measured in 2016.

Specific goals of the survey were to:

- Establish the demographic profiles of consumers with trial or purchase of Australian wines of the varietal types/regions identified as the primary promotional focus of the new strategy document.
- Measure the degree of influence of purchase factors, including region of production and varietal type (alongside factors such as price, ratings, discounted pricing, packaging, etc.).
- Specifically test the value of region vs. varietal type as purchase decision factors.
- Assess the perceived value of different sources of information on wine regions.
- Measure purchase frequency of Australian wines vs. those of leading competitor countries.
- Among current Australian wine purchasers, assess perceptions of “quality for the price” of red or white Australian wines under and over $15.

INTRODUCTION (continued)

- Determine the leading reasons for not purchasing Australian wine in the past year, and/or negative perceptions of Australian wine.
- Through a multi-cell test, measure the impact of regional specificity on perceptions of wine quality.
- Measure the degree of trial or interest in trial of leading varietal types of Australian wine.
- For comparison to previous research, establish degree of trial and liking of wines from the principal producing regions in Australia.
- Establish the most prevalent set of Australian wine likes and dislikes, and current consumer perceptions of Australian wine attributes.

Methodology

In total, 1,795 Wine Opinions consumer panelists participated in this survey. Respondents were split into three cells for the question determining the relationship of specificity of region to perceived wine quality. Cell sizes range from 485 to 530.

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

- Generation: iGen[1] 21 – 24; Millennials 25 – 42; GenX 43 – 54; Baby Boomers 55 – 73; Ages 74+
- Gender
- Purchasers of wines costing $15 - $30 vs. others
- Frequent or occasional purchasers of Australian wines vs. others
- Those who currently buy Australian wines over $15 and rate them highly vs. others.

Note: In the tables that follow, light tan shadings call out row numbers of directional or statistical significance.

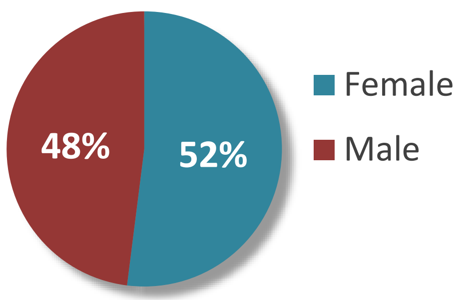
[1] iGen or iGeneration refers to a smaller proportion of the Generation Y where the active use of technology is central to all elements of life and influences not only how things are done but also attitudes and values.

KEY TAKEAWAYS

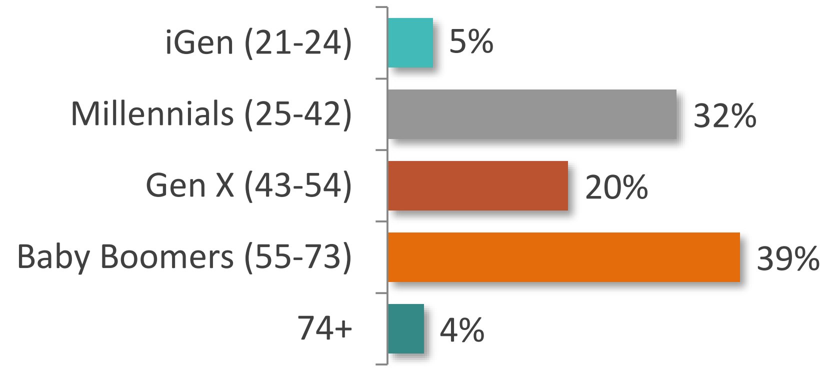
- There appears to be an opportunity for introduction or re-introduction to Australian wines on the U.S. market, as about one-third of respondents state that they don’t know enough about Australian wines to know what they might like. Similarly, another one in four say they have not often seen Australian wines where they shop for wine, and/or that Australian wines have not been recommended to them. It is not known if distribution, lack of representation of good selections of Australian wines selling over $15, education of the trade, or related factors contributed to these findings.
- In a test of the degree of importance of a variety of factors that might influence wine purchase decisions, knowing the grape variety and the region of production were solidly the top choices, validating the “pairing” strategy of Wine Australia. A separate test between the two factors showed varietal type to more likely be a deciding factor in purchase choice.
- An opportunity for increased placement (distribution) of wines that are the focus of the strategy document is indicated by the fact that 52% of respondents agreed with the statement “I am intrigued by the different regions and appellations of Australia.” This sentiment was expressed most often by the youngest respondents – iGeneration and Millennials.
- The challenge of placing Australian regional wines of quality in broad distribution was underscored as the leading “dislike” among consumers who buy Australian wines over $15 and give high ratings to their quality, citing them as “hard to find” .
- Wines labeled with regional identification more specific than country or state were shown to be perceived by respondents as significantly higher in quality. This was especially true of those who frequently buy wines over $15.
- Of the ten Australian wine regions tested, Barossa Valley and Tasmania were by far the most widely known to respondents (only 36% had “never heard of” these regions). All other regions were much less known, with “never heard of” percentages ranging from 42% to 53%. There is clearly much room for consumer education and the development of awareness and trial of these wines.
- There was a statistically significant decline in the 2019 survey vs. 2016 in the percentage of respondents citing “Too fruity/fruit bomb” as what they like least about Australian wines.

RESPONDENT PROFILES

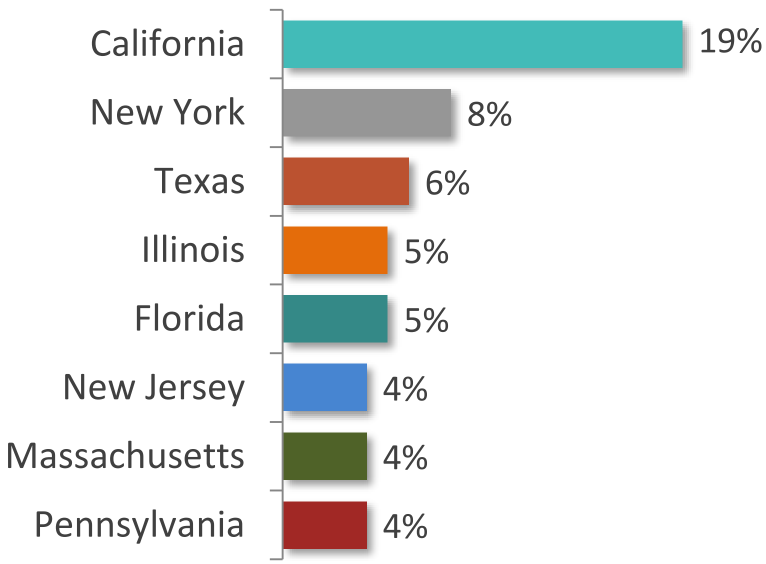
Respondents by Gender



Respondents by Generation



Top States Represented



Respondent Wine Consumption Frequency

Every day	30%
A few times a week	52%
About once a week	10%
Several times a month	6%
About once a month	2%
Once every 2 – 3 months	1%
Less often than every 2 – 3 months	0%

WINE PURCHASE FREQUENCIES

Respondents fit the profile of highly involved wine drinkers in terms of consumption frequency (noted on previous page) and wine purchase frequency by price segment (below) with 54% buying in the critical $15 - $20 price range monthly or weekly and 34% buying in the $20 - $30 range at that frequency.

Weekly/monthly purchases under $10 skew to iGen and Millennial respondents, while purchases of wine from $10 - $20 are fairly equal across age segments. Purchases in the $20 - $30 pride range are most frequent among GenX respondents.

Italy and France dominate all other countries tested in terms of purchase frequency in the past year, with Spain in a middle tier of its own.

Past year purchase frequencies for Australia, New Zealand, Argentina, and Chile are similar, with 35% - 37% “several purchases” or “frequently” in the past year. For each of these four countries, 1 – 2 purchases in the past 12 months was most likely.

Purchase Frequency by Price

	WEEKLY	MONTHLY	SEVERAL TIMES A YEAR	LESS OFTEN	NEVER
Under $10	22%	24%	16%	21%	16%
$10 - $14.99	24%	38%	22%	13%	3%
$15 - $19.99	16%	38%	32%	11%	3%
$20 - $29.99	6%	28%	36%	22%	8%
$30 or more	4%	16%	30%	33%	17%

Purchase Frequency by Country

	PURCHASE FREQUENTLY	MADE SEVERAL PURCHASES	MADE 1-2 PURCHASES	HAVE NOT PURCHASED
Italy	34%	33%	24%	9%
France	32%	31%	25%	12%
Spain	24%	31%	30%	15%
New Zealand	12%	23%	33%	33%
Argentina	10%	27%	35%	28%
Australia	10%	27%	35%	28%
Chile	10%	26%	35%	29%

IMPORTANCE OF WINE PURCHASE FACTORS

Respondents were asked to rate the level of importance they attached to a number of factors that might influence their purchase decision. They were to assume that they were “looking for a new wine to try.”

Ratings were on a 7 point scale, where 7 means “Very likely to influence my decision,” and 1 means “Not at all likely to influence my decision.”

Of greatest importance were varietal type and region of production, with mean scores of 6.1 and 6.0 respectively. Recommendation of a friend (5.7) and having tried and liked other wines from the region (5.6) formed a second tier of importance.

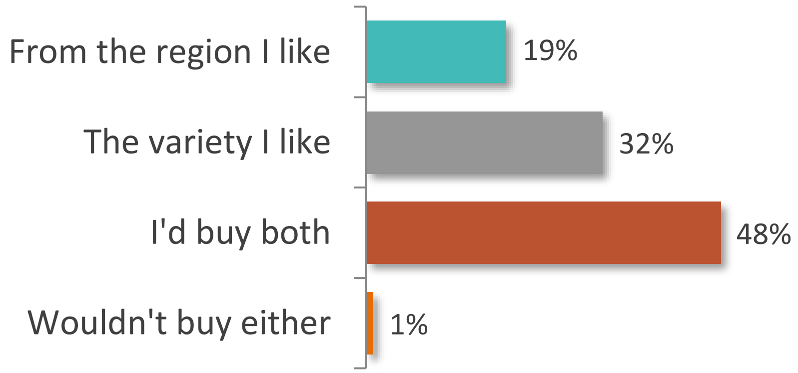
A following question posed a situation wherein respondents were asked respondents were asked to indicate whether they were more likely to buy a wine from a region whose wines they like and buy, but from a different grape variety than they usually buy; or of a grape variety they like and buy, but from a different region than they usually buy. They could also opt to “buy both wines” or not buy either one.

In the test, “I’d buy both” was the most prevalent choice, but wine variety was favored over region by 32% of respondents vs. 19%.

Importance of Purchase Factors

The grape variety of the wine is among my favorites	6.1
From a region that produces other wines that I already know and like	6.0
The wine has been recommended by a friend	5.7
I have tried and liked wines from other regions in the country where this wine was made	5.6
Score of over 90 points from a wine critic or publication	5.0
There’s a 10% discount offered on the wine	4.5
Has won a gold medal or award in a competition	4.5
The label catches my eye or is quite attractive	4.2

Region vs. Variety Choice



INTEREST IN SOURCES OF WINE INFORMATION

Respondents were asked to rate the degree of importance they attached to a variety of sources that might provide information on a wine region in which they are interested.

By a wide margin, in-store tastings were considered to be of the greatest interest. Advice for a variety of sources formed a second tier, led by advice from a sommelier in a restaurant or a knowledgeable staff person in a retail store, which was of most interest to iGen and Millennial respondents.

Recommended food pairings and articles on the region were forms of advice also of at least some interest to 67% and 76% of respondents respectively. These sources of advice were also rated highest by iGen and Millennials.

Articles in wine columns or magazine and wine critic reviews were valued somewhat more by Baby Boomers and older respondents than the younger segments.

A regional website and social media posts for the region were considered not of interest respectively by 40% and 51% of survey respondents.

Interest in any source was not related to consumption frequency, but those giving high quality ratings to Australian wines over $15 were more interested than others in maps, articles, critic reviews and advice.

Information Source Interest

	Great Interest	Some Interest	Not Much Interest	No Interest at All
An in-store tasting of wines from the region	64%	30%	5%	2%
Advice from Somm or knowledgeable staff	34%	50%	13%	3%
Recommended food pairings for region’s wines	22%	45%	25%	7%
Articles on region in wine column or wine magazine	22%	54%	19%	5%
A map of the region and its vineyard areas	19%	44%	28%	9%
Wine critic reviews of the region’s wines	17%	54%	22%	6%
The region’s informational website	13%	47%	30%	10%
Social media posts from the region	9%	40%	35%	16%

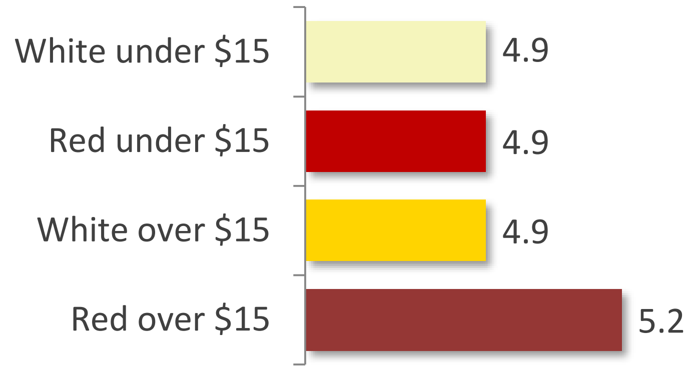
AUSTRALIAN WINE QUALITY PERCEPTIONS

A total of 1,151 respondents (or 64 per cent of the sample) reported purchasing an Australian wine in the past 12 months. The quality of these wines was rated by purchasers on a 7-point scale where 7 means "very best quality" and 1 means "very worst quality."

White wines and red wines under $15 as well as white wines over $15 were given mean ratings of 4.9, while red wines over $15 earned a mean rating of 5.2. Ratings for the under-$15 wines given by the youngest respondents (age 21 – 24*) were slightly higher than for older respondents. For Australian red wines over $15, the higher ratings skewed toward GenX and Baby Boomer respondents.

Purchasers were also permitted to answer "Don't know or no opinion." The highest percentage of "don't know" responses for Australian wines over $15 was given by the iGen respondents (age 21 – 24). The highest percentage of "don't know" responses for Australian white wines under $15 was given by Baby Boomers and older respondents.

Australian Wine Quality Ratings



* Caution, very small base size

NON-PURCHASER RESPONSES

The 450 respondents who had not purchased an Australian wine in the past 12 months were shown a list of reasons for not purchasing Australian wine.

About one-third of respondents agreed they either like U.S. wine better, or like European wines better, or just don't know much about Australian wine.

Not knowing much about Australian wine skewed heavily toward iGen (58%*) and Millennial (40%) respondents. These youngest age groups were also the most likely to respond that no one has ever recommended an Australian wine to them (iGen 69%*, and Millennials 31%).

While only 12% indicated that they used to like Australian wines but that their tastes had changed, this response was more likely to be given by GenX and Baby Boomer respondents than the younger segments.

One in four respondents (24%) agreed that they had not seen Australian wines very much in the places they buy wines, and an equal percentage agreed that no one has ever recommended an Australian wine to them. These responses may be symptomatic of an issue of distribution and/or education of the trade.

Reasons for Not Purchasing Australian Wines

I just like wines from California (or Oregon or Washington) better	36%
The European wines are more to my liking	33%
Don't know much about them and am not sure which ones I'd like	33%
I don't see them very much in the places I buy wine	24%
No one has ever recommended an Australian wine to me	24%
Don't like big, blockbuster Australian wine style	20%
They are just not to my liking	16%
I used to like them, but my tastes have changed	12%
I tend to buy wines over $15 and I don't see many Australian wines in that price range	8%

* Caution, very small base size

REASONS FOR NOT LIKING AUSTRALIAN WINE

Those who had not purchased an Australian wine in the past 12 months, and who chose “They are just not to my liking” as the reason were posed a follow-up question.

There were 69 respondents in this category. They were asked to “describe what it is about Australian wines that you do not like” in a comment box.

As categorized by Wine Opinions, the answers mainly point to perceptions that are similar to those of the 20% of respondents who indicated in the previous question that they do not like “the big, blockbuster style” of Australian wines.

Reasons for “Not to My Liking”

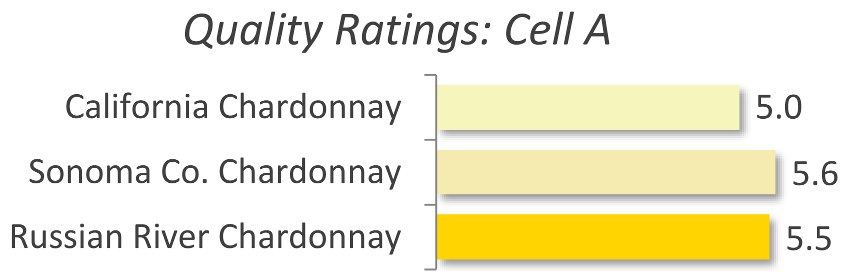
Taste (general)	22%
Fruit bombs/overly jammy/ripe	22%
Too brash/bold/big/lacking in subtlety	20%
Haven’t found any I like	13%
Not a Shiraz fan/Australia is mainly Shiraz	9%
Too sweet/too much added sugar	7%
Too high in alcohol	7%

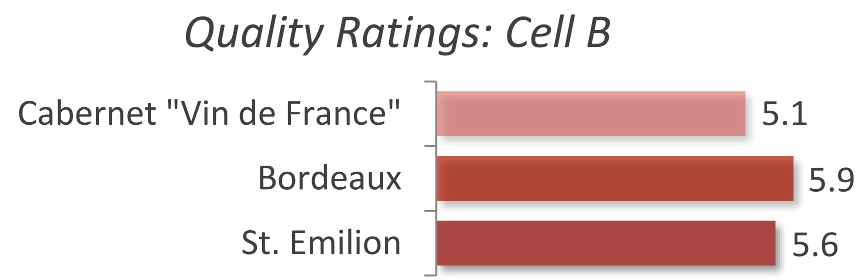
VALUE OF REGIONAL SPECIFICITY

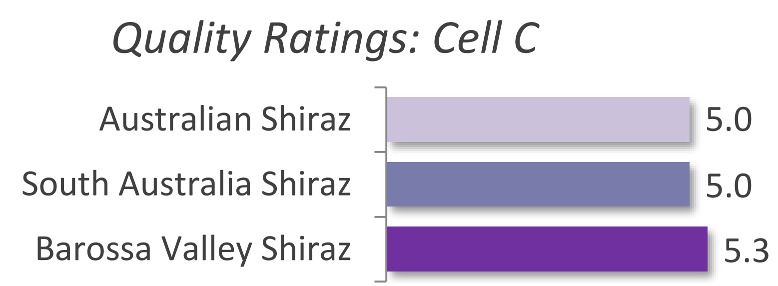
A three-cell test was conducted to determine the degree of correlation (if any) between increasing levels of specificity in defined wine production areas and perceptions of wine quality. Survey respondents were shown three production regions and asked to rate the likely quality of wine produced in each. Ratings were on a 7 point scale where 7 meant “the very highest quality” and 1 meant “very poor quality.”

Respondents were randomly viewed either three California Chardonnay regions, three Cabernet regions in France, or three Shiraz regions in Australia. Mean quality rating scores for all wines ranged from 5.0 to 5.9. In each cell, quality assumptions for wines from one or more regions or sub-regions received higher mean ratings than wines labeled from the country or state levels.

The results also indicate that awareness of a region exceeds level of specificity in importance, which may be exemplified by the higher quality rating for “Bordeaux” than “St. Emilion,” or “Sonoma County” than “Russian River Valley.”







INTEREST IN AUSTRALIAN WINES

Respondents were first asked their degree of trial, purchase of, and whether they like eight types of wine. Succeeding questions determined the level of interest respondents would (or do) have in Australian wines of those types.

The chart at right details the current degrees of purchase, trial, or interest in Australian wines of the types that respondents say they have tried and liked or buy sometimes or regularly.

Australian Shiraz (35%) and Syrah or blends (22%) are the only Australian wines among all varieties that are currently purchased by one in five or more respondents.

Purchase of Australian Shiraz, Syrah or blends, and Cabernet Sauvignon skew somewhat male. Chardonnay purchasers skew female.

Some 35% - 42% have tried and liked Australian Shiraz, Syrah or blends, Cabernet Sauvignon, and Chardonnay. Interest in trying Australian Riesling, Pinot Noir, and Sparkling wines among those who like or buy such wines is strong, ranging from 42% for Pinot Noir to 45% for Riesling and 52% for Sparkling.

Usage or Interest in Australian Wines

(Base: have tried and liked or buy these wine types)

	Buy sometimes or regularly	Tried and liked	Tried and didn't like	Not tried but interested	Not tried not interested
Shiraz	35%	42%	5%	14%	4%
Syrah/Syrah blends	22%	35%	7%	29%	8%
Red blends	16%	36%	5%	33%	10%
Cabernet Sauvignon	14%	42%	8%	28%	9%
Chardonnay	10%	36%	9%	30%	14%
Riesling	7%	25%	4%	45%	19%
Pinot Noir	7%	28%	8%	42%	15%
Sparkling wine	4%	20%	4%	52%	21%

INTEREST IN AUSTRALIAN WINES (Continued)

The chart at right shows the degree of interest in Australian wines of the types respondents say they have not tried but are interested in trying.

While base sizes for the individual types of wines were small, it was clear that there was good interest in trying Australian wines among those who have not tried but are interested in trying each type of wine.

Interest was strongest for the red wines, with 80% saying they were somewhat or very interested in trying Australian Syrah or Syrah blends, while 77% expressed such interest in Shiraz, as did 74% for red blend wines. Among white wines, 61% respondents reported being somewhat or very interested in Riesling and sparkling wines. Lowest interest in all wine types was for Chardonnay, with 52% saying they were somewhat or very interested in this type of wine from Australia.

Interest in Trying Australian Wines
(Base: have not tried but interested in these types)*

	Very interested in trying	Somewhat interested in trying	Not very interested in trying	Not at all interested in trying	Not sure or don't know
Syrah/Syrah blends	32%	48%	10%	4%	6%
Shiraz	25%	52%	11%	6%	6%
Riesling	22%	39%	10%	13%	16%
Chardonnay	20%	32%	22%	22%	4%
Cabernet Sauvignon	20%	46%	7%	11%	17%
Red blends	20%	54%	17%	2%	7%
Sparkling wine	18%	43%	17%	18%	4%
Pinot Noir	13%	52%	15%	17%	4%

* Caution, small base size

PERCEPTIONS OF AUSTRALIAN WINES

A series of statements about Australian wines, aspects of their production and qualities, and consumer attitudes toward the wines were presented to survey respondents to review.

More than half of the respondents (58%) agreed that most people don't know about the smaller, artisanal wineries of Australia. And 52% indicated they were intrigued by the different regions and appellations of Australia – a sentiment strongest among iGen (65%) and Millennial (56%) respondents.

Nearly half (49%) believe Australia offers some good quality brands that are widely available, while 44% agreed the wines offer a lot of flavor for the money and 39% agreed Australian wines go well with a wide range of foods. Agreement with all of these statements skewed primarily toward Baby Boomer respondents, as did looking to Australia mainly for Shiraz (34% of Baby Boomers vs 19% - 30% of others).

Recent discovery of how good Australian wines can be was expressed mainly by the youngest (iGen) consumers at 28% vs. 9% - 12% for older respondents.

Frequent purchasers of Australian wine were much more likely than others to agree with the statements of quality, value, flavor, and food-friendliness.

Perception Statement Agreement

Most people don't know about the small, artisanal wineries of Australia	58%
I am intrigued by the different regions and appellations of Australia	52%
Australia has some reliable, good quality brands that are widely available	49%
Australian wines offer a lot of flavor for the money	44%
Australian wines go well with a wide range of foods	39%
I look to Australia mainly for Shiraz; for other varieties I tend to buy from other countries	31%
I buy mainly fine Australian wines above $15, not the big volume, lower priced brands	26%
I look to Australia more for reliable value wines than top quality or special occasion wines	21%
I have recently discovered how good Australian wines can be	10%

AUSTRALIAN WINE REGION FAMILIARITY

The survey measured degrees of familiarity and trial/purchase of wines from major producing regions of Australia. More than half of respondents had either not heard of or heard of and not tried wines from every region except Barossa Valley (48% heard of not tried or not heard of). The combination of heard of not tried and not heard of for all other regions ranged from 56% for McLaren Vale to 79% for Tasmania.

The at least occasional purchase of wines from the best known regions (Barossa Valley, McLaren Vale, and Coonawarra) was skewed significantly to Baby Boomers.

For all regions, the ratio of “tried and liked” to “tried and disliked” was extremely favorable, with approximately 10 times as many respondents who had tried and liked the wines to every respondent who had tried and disliked the wines.

Wine Regions – 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	22%	27%	3%	12%	36%
McLaren Vale	16%	24%	3%	12%	44%
Coonawarra	10%	23%	3%	18%	46%
Eden Valley	9%	24%	2%	23%	43%
Yarra Valley	9%	25%	2%	19%	45%
Adelaide Hills	9%	25%	2%	22%	42%
Margaret River	9%	18%	2%	17%	53%
Clare Valley	8%	20%	2%	20%	50%
Hunter Valley	8%	20%	2%	19%	51%
Tasmania	5%	15%	2%	43%	36%

AUSTRALIAN WINE - ”LIKES”

At the end of the survey, respondents were asked to comment on what they liked best (and what they liked least) about Australian wines. Comment boxes were provided for the remarks, which have been sorted and categorized for this report.

The top two “likes” stood out both in frequency of mention and as perceptions familiar through the five-year period of this report:

That the wines are “affordable” or inexpensive was cited by 17% of respondents, but an additional 15% stated “good value,” and 4% noted ”good quality for the price. Baby Boomers were most likely to express these sentiments.

That Australian wines are seen as “big, bold, rich, and full-bodied” was the consensus of 16% of respondents. An additional 4% stated “fruit-forward, fruity, very ripe.”

Likes Best About Australian Wines

Affordable/cost/inexpensive/price	17%
Big/bold/rich/full bodied/depth of flavor	16%
Value/good value	15%
Taste/flavor (general)	10%
Shiraz/like Shiraz/make great Shiraz	6%
Quality/decent quality	6%
Fruit forward/fruity/very ripe	4%
Good QPR	4%
Distinct/Unique winemaking style	4%
Crisp taste/crispness	2%
Consistent quality/reliable	2%
Fresh	2%
Unique expression of climate	2%
White wines	2%
Sauvignon Blanc	2%

AUSTRALIAN WINE - ”DISLIKES”

A number of “dislikes” about Australian wine (“fruit bombs,” “too jammy,” “alcohol,” “too big,”) essentially were expressions of attributes a good many other respondents cited as “likes,” (“big,” “bold,” “rich,” “full-bodied”). These perceptions did not skew toward a single age group, but did skew toward those who most frequently buy wines in the range of $15 - $30.

A second dislike of note was the lack of availability of the better wines in broad U.S. distribution - a factor at the heart of the new strategy being tested in this current survey. This dislike was cited by 10% of respondents, and skewed toward those who rate Australian wines highly and purchase Australian wines priced over $15.

All other “dislikes” mentioned were cited by very few respondents.

Likes Least About Australian Wines

Availability/hard to find better wines/only larger providers available	10%
Fruit bombs/too jammy/overly ripe/too fruit forward	9%
Alcohol content	6%
Too big/bold/lack complexity/too much	6%
Poor quality of cheaper wines/cheap wines are not good	6%
Taste (general)	5%
Many bulk wines/mass market wines	4%
Inconsistent quality	4%
Many mediocre/average wines/boring wines/one dimensional wines	4%
Critter labels/joke labels/Yellowtail	3%
Many are overly sweet	3%
White wines (general)	3%
Price (general)	2%
Price for better/more highly rated wines is very high	2%
Overall quality	2%
Not much information available re: wines/regions/confusing regions	2%
Limited varietal selection	2%

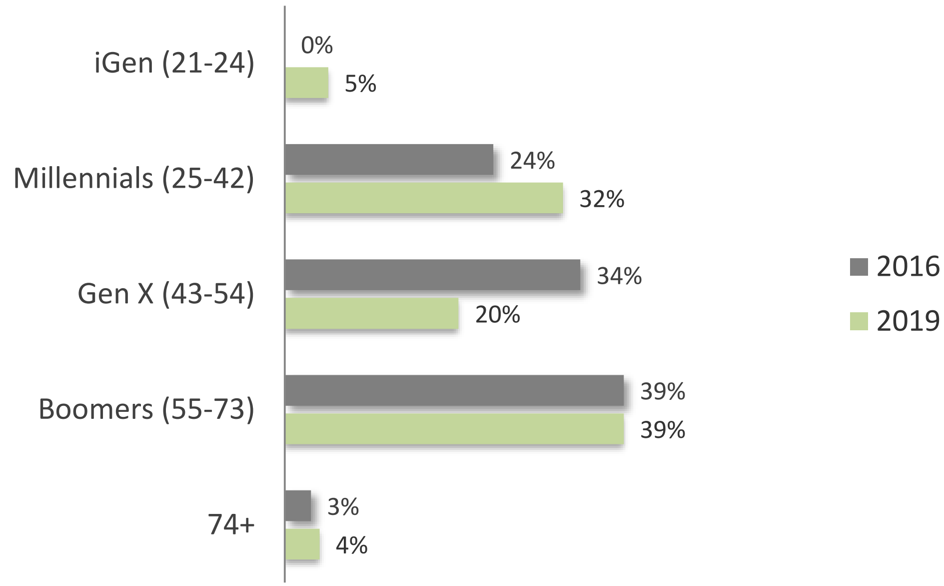
TRENDED DATA

There were a few questions in the 2019 survey that were first included in a 2016 half-length consumer survey. The data on this and succeeding pages compares responses from the 2016 and 2019 surveys.

Some differences between the 2016 and 2019 survey findings may stem from differences in the composition of the Wine Opinions consumer panel today in comparison to 2016. The panel now has a greater proportion of Millennial wine drinkers, and also includes iGen wine drinkers ages 21 – 24. Correspondingly, the proportion of GenX respondents has declined. The younger skew of the 2019 respondent pool accounts for the fact that slightly fewer 2019 respondents frequently buy wines costing $20 - $30 (40% in 2016 vs. 34% in 2019). The age skew also accounts for a slightly smaller proportion of daily wine drinkers in 2019 (30%, vs. 35% in 2016).

A slightly lower percent of 2019 respondents reported purchasing Australian wines in the past year than in 2016 (10%, vs. 13% in 2016), which also corresponds to the difference in age profiles in the two surveys.

Respondents by Generation 2016 - 2019



TRENDED DATA

Quality ratings among those who have purchased Australian wines under $15 in the past year changed only slightly, from 5.1 in 2016 to 4.9 in 2019. It is possible that this perception shift may be related to the "premiumization" trend among consumers.

Among those who indicated they did not buy an Australian wine in the past year, there was a very slight (not statistically significant) increase in those saying that they used to like Australian wines but their tastes have changed (9% in 2016 and 12% in 2019).

There was a significant increase between the two surveys in those saying they tend to buy wines over $15 and don't see many Australian wines in that price range. This may be an indication distribution challenges for Australian wines over $15.

Australian Wine Quality Ratings

	2016	2019
Australian white wine under $15	5.1	4.9
Australian red wine under $15	5.1	4.9
Australian white wine over $15	4.9	4.9
Australian red wine over $15	5.2	5.2

Reasons Have Not Purchased

	2016	2019
I don't know much about them and am not sure which ones I'd like	34%	33%
I don't see them very much in the places I buy wine	21%	24%
I used to like them but my tastes have changed	9%	12%
I tend to buy wines over $15 and don't see many Australian wines in that price range	3%	8%

TRENDED DATA

In the 2019 survey there were no reported declines in the purchase of wines from any region included in the 2016 survey.

Directional increases in purchase were noted in the Barossa and Eden Valleys, Coonawarra, Adelaide Hills, Yarra Valley, Margaret River, Hunter Valley, and a statistically significant gain for Tasmania. These gains, while quite modest, point to increased awareness among high frequency wine drinkers and consumers who regularly buy wines over $20.

In the 2019 survey, Southeast Australia and Southwest Australia were not measured.

“Buy at Least Occasionally” by Region

	2016	2019
Barossa Valley	19%	22%
McLaren Vale	16%	16%
Coonawarra	9%	10%
Clare Valley	8%	8%
Eden Valley	8%	9%
Adelaide Hills	8%	9%
Southeast Australia	8%	*
Yarra Valley	7%	9%
Margaret River	7%	9%
Hunter Valley	6%	8%
Southwest Australia	5%	*
Tasmania	3%	5%

*Did not include in 2019

TRENDED DATA

The top “likes” about Australian wine (good value/affordable, and big/bold flavors) remained essentially unchanged in 2019 from the 2016 survey. There was a decline in “Shiraz/Syrah” as a stated “like” (10% in 2016 vs. 6% in 2019).

In the category of “like least,” the top two reasons (“fruit bombs,” “hard to find”) were also unchanged from 2016 to 2019. However, there was a slight decline in the percentage of respondents citing “hard to find the better wines” (12% in 2016 vs. 10% in 2019).

There was a significant decline in the “Too fruity/fruit bomb” dislike, which fell from 16% in 2016 to 9% in 2019.

Like Best About Australian Wines

2016 (Base = 811)		2019 (Base = 999)	
Good value/QPR	20%	Affordable/cost/ inexpensive/price	17%
Big/bold red wines/depth of flavor/ full bodied	17%	Big/bold/rich/full bodied/depth of flavor	16%
Taste/flavor (general)/ drinkability/great taste	14%	Value/good value	15%
Shiraz/Syrah/good Shiraz	10%	Taste/flavor (general)	10%

Like Least About Australian Wines

2016 (Base = 613)		2019 (Base = 940)	
Too fruity/fruit bombs/jammy/over-ripe flavors	16%	Availability/hard to find better wines/only larger providers available	10%
Availability/hard to find/limited selection of better wines	12%	Fruit bombs/too jammy/overly ripe/too fruit forward	9%
Cost/price (general)	7%	Alcohol content	6%
Taste/flat/boring/all taste the same	6%	Too big/bold/lack complexity/too much	6%

AUSTRALIA CONSUMER QUESTIONNAIRE

1. What is your age? Drop-down list of exact ages starting with “Under 21” and ending with “74 and over.” *(Under 21 disqualifies)*

2. What is your gender?

Male

Female

3. In what state do you live? *(Drop-down menu of states: Canada and “Other” terminate)*

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

Every day

A few times a week

About once a week

Several times a month

About once a month

Once every 2-3 months

Less often than once every 2-3 months *(Disqualifies)*

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 $10

$10 - $14.99

$15 - $19.99

$20 - $29.99

$30 or more

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

7 – Very likely to influence	6	5	4	3	2	1 – Not at all likely to influence

The wine is from a region that produces other wines you already know and like

There is a 10% discount offered on the wine

The grape variety of the wine is among your favorites

The wine has gotten a score of over 90 points from a wine critic or publication

You have tried and liked wines from other regions in the country where this wine was made

The wine has won a gold medal or award in a competition

The wine has been recommended to you by a friend

The label catches your eye and is quite attractive

(Choices rotate)

7. Imagine that you are browsing in one of your favorite wine shops and come across the two wines described below. Assume that the wines are the same price, and each is recommended by a trusted staff member in the shop. Here are descriptions of the two wines:

Wine A – A wine from a region that produces wines you like and often buy, but made from a different grape variety than the wines from that region you usually buy.

Wine B – A wine made of a grape variety that produces wines you like and often buy, but from a different region than the wines of that variety you usually buy.

From the list below, what would you most likely do?

I’d probably buy Wine A (from the region that I know I like)

I’d probably buy Wine B (the variety that I know I like)

I’d buy them both because I like trying new wines

I’d probably not buy either one

8. When you are looking for information on a wine region whose wines you are interested in trying, what is your degree of interest in the kinds or sources of information listed below?

Great interest	Some interest	Not much interest	No interest at all	Not sure or don't know

The region's informational website

A map of the region and its vineyard areas

Recommended food pairings for wines of the region

Articles on the region in a wine column or wine magazine

Wine critic reviews of the region's wines

Social media posts from the region and its winemakers

An in-store tasting of wines from the region

Advice on the region and its wines from a sommelier in a restaurant or a knowledgeable staff person in a retail store

(Choices rotate)

9. In the past year, which of the following best describes your purchases of wines from the countries listed below? If you have not purchased wine from a given country, please choose that answer.

I purchase these wines frequently	Have made several purchases	Have made one or two purchases	Have no purchased in the past year

Spain

Italy

New Zealand

Argentina

Australia

Chile

(Countries rotate)

10. (This question is shown only to those indicating a purchase of Australian wines in Q9) Thinking of any wines from AUSTRALIA you have purchased at retail in the past 12 months, please indicate your opinion of the PRICE/QUALITY ratio (value) of them. 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 have not purchased a wine described in a given row, please just select “don’t know or no opinion” in that row.

7 – Very likely to influence	6	5	4	3	2	1 – Not at all likely to influence

Australian WHITE wine UNDER $15

Australian RED wine UNDER $15

Australian WHITE wine OVER $15

Australian RED wine OVER $15

(Skip over Q11 to Q13)

11. (This question is shown only to those indicating NO purchase of Australian wines in Q9) You indicated that you have not purchased any Australian wine in the past 12 months. Please indicate the reason(s) why, by either choosing from the list of reasons below or entering your own in the text box below the list. You may choose as many reasons as apply.

I don’t like the big, blockbuster Australian wine style

I just like wines from California (or Oregon, Washington) better

The European wines are more to my liking

No one has ever recommended an Australian wine to me

I don’t know much about them and am not sure which ones I’d like

I don’t see them very much in the places where I buy wine

I used to like them, but my tastes have changed

They are just not to my liking

I tend to buy wines over $15 and I don’t see many Australian wines in that price range

Other (please enter reason below)

(Reasons rotate except for “Other”)

12. *(This question is shown only to those indicating "just not to my liking" in Q12)* In the previous question, you indicated that Australian wines are not to your liking. In the comment box below, please describe what it is about Australian wines that you do not like. *(Open-ended comment box)*

13. 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
Syrah (or blends of Syrah and other "Rhone" varietals)
Other Red blend wines
Sparkling wine
(Varieties rotate)

Respondents are divided randomly into three cells, and then see one of the following questions:

14. Please rate the quality you would expect from each of the three wines listed below. Assume that each is from a credible producer or winery. Please rate them on a 7-point scale where "7" means "the very highest quality" and "1" means "very poor quality." *(Drop down 7-point scale next to each type)*

Cell 1 sees:

California Chardonnay
Sonoma County Chardonnay
Russian River Chardonnay

Cell 2 sees:

Cabernet Sauvignon Vin de France
Bordeaux
St. Emilion

Cell 3 sees:

Australia Shiraz
South Australia Shiraz
Barossa Valley Shiraz

15. Respondents are shown from Q13 the wine types they have tried and liked or buy sometimes/regularly. You indicated you have tried and liked, buy sometimes, or buy 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.

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

Each row is a type of wine the respondent checked as either “tried and liked” or “buy sometimes/regularly” in Q13

16. Respondents are shown from Q13 the wine types they checked as “not tried but interested.” You indicated you have not tried, but are interested in trying the wine types listed below. Please indicate your degree of interest in trying each of these types of Australian wine.

Very interested in trying from Australia	Somewhat interested in trying from Australia	Not very interested in trying from Australia	Not at all interested in trying from Australia	Not sure or don’t know

17. 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)

18. What is it that you like BEST about wines from Australia, and what is it that you like LEAST about them? Please offer a brief comment in one or both of the boxes below. If you have not tried or have no opinion about Australian wines, please just skip this question.

Like BEST about Australian wine

Like LEAST about Australian wine

19. 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

I buy mainly fine Australian wines above $15; not the big volume, lower priced brands

Most people don’t know about the small, artisanal wineries of Australia

Australia has some reliable, good quality brands that are widely available

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

I have recently discovered how good Australian wines can be

Australian wines go well with a wide range of foods

(Statements rotate)

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