Regional analysis 2019

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Regional awareness

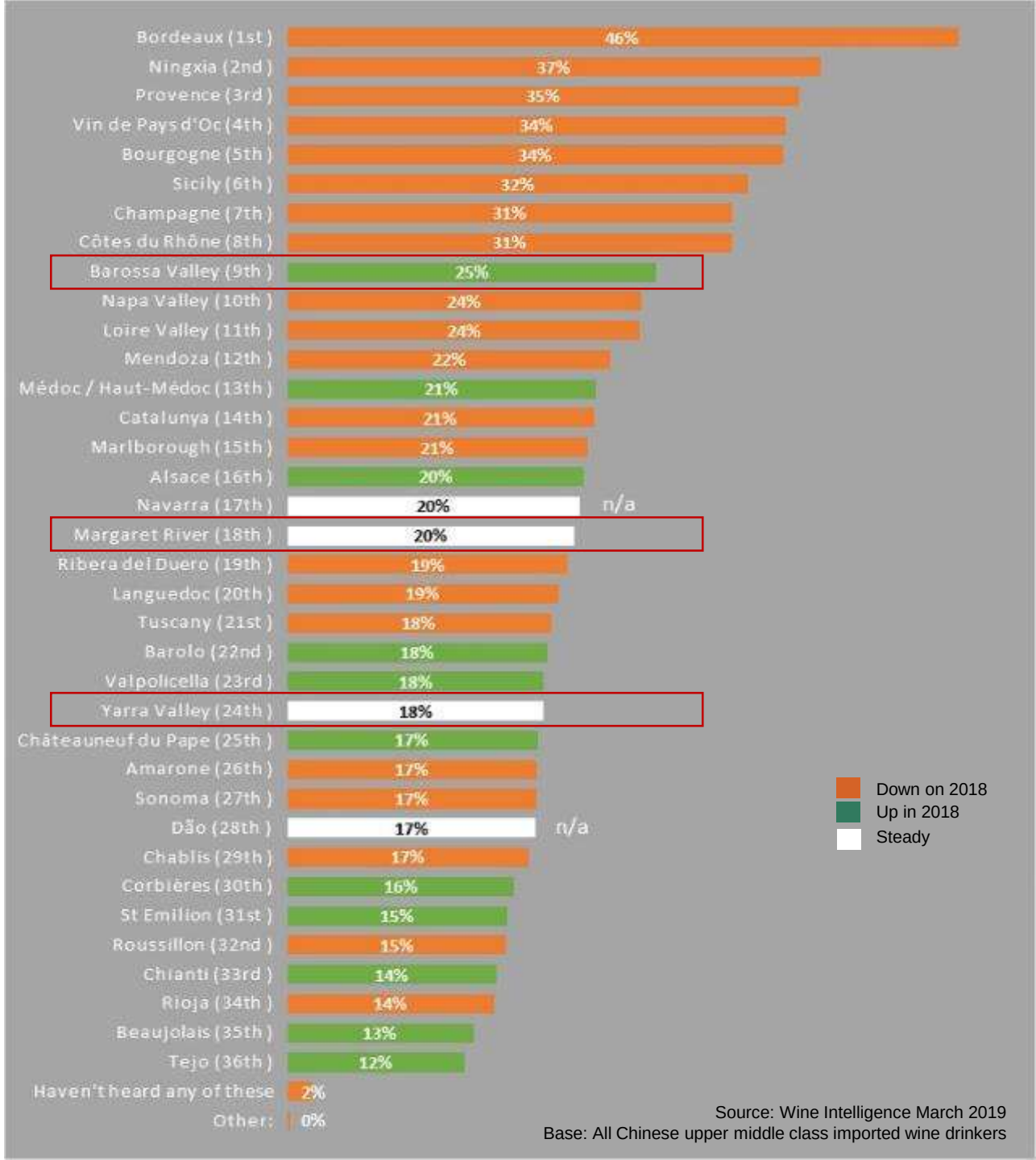
Region of origin is not always the top wine-buying choice cue but……

China	USA	UK	Canada	New Zealand	Singapore	Japan	Australia
Country of origin	Grape variety	Grape variety	A brand I am aware of	Grape variety	Wine that matches or compliments food	Wine that matches or compliments food	Grape variety
Grape variety	A brand I am aware of	Taste or wine style descriptions displayed on the shelves or on wine labels	Grape variety	A brand I am aware of	Promotional offer / discount	Country of origin	A brand I am aware of
Words describing the flavour of the wine	Wine that matches or compliments food	Country of origin	Recommendation by friend or family	Promotional offer / discount	Recommendation by friend or family	Region of origin	Country of origin
Region of origin	Recommendation by friend or family	Wine that matches or compliments food	Taste or wine style descriptions displayed on the shelves or on wine labels	Recommendation by friend or family	Grape variety	Taste or wine style descriptions displayed on the shelves or on wine labels	Recommendation by friend or family
A brand I am aware of	Taste or wine style descriptions displayed on the shelves or on wine labels	Promotional offer / discount	Wine that matches or compliments food	Country of origin	Country of origin	Grape variety	Wine that matches or compliments food
Quality indicators (medals / awards	Promotional offer / discount	Region of origin	Country of origin	Wine that matches or compliments food	A brand I am aware of	Recommendation by friend or family	Taste or wine style descriptions displayed on the shelves or on wine labels

Source: Wine Intelligence

Awareness of regions from China market is high

- **Barossa Valley – 25% aware, 9% have drunk in the past 3 months (consistent with 2018)**
- **Yarra Valley – 18% aware, 6% have drunk in the past 3 months (increased since 2018)**
- **Margaret River – 20% aware, 7% have drunk in the past 3 months (increased since 2018)**
- **A third of those that were aware of the three Australian regions drank the wine.**
- **Bordeaux – 46% aware, 31% have drunk in the past 3 months (dropped since 2018)**



Source: Wine Intelligence March 2019
Base: All Chinese upper middle class imported wine drinkers

Awareness of most regions has been steady over time

Prompted region awareness % who have heard of following regions Base=All Chinese upper middle class imported wine drinkers	Nov-13 n=1,492	Mar-15 n=1,001	Jul-18 n=1,000	2013 vs 2018	2015 vs 2018
Barossa Valley	41%	38%	47%	⬆	⬆
Margaret River	37%	40%	39%	➡	➡
Hunter Valley	37%	33%	47%	⬆	⬆
Eden Valley	34%	36%	30%	⬇	⬇
Mornington Peninsula	34%	34%	27%	⬇	⬇
Great Southern	33%	34%	32%	➡	➡
Tasmania	33%	29%	27%	⬇	➡
Yarra Valley	33%	33%	37%	⬆	⬆
Langhorne Creek	32%	28%	26%	⬇	➡
Adelaide Hills	31%	30%	29%	➡	➡
McLaren Vale	29%	30%	27%	➡	➡
Coonawarra	28%	30%	33%	⬆	➡
Clare Valley	28%	29%	28%	➡	➡
Grampians	28%	29%	19%	⬇	⬇
Rutherglen	27%	26%	22%	⬇	⬇
Other	n/a	n/a	2%	n/a	n/a
None of these	12%	12%	6%	⬇	⬇

➡: statistically no significant change compared to previous wave(s)
⬆: statistically significantly higher than previous wave(s) at a 95% confidence level
⬇: statistically significantly lower than previous wave(s) at a 95% confidence level

Source: Wine Intelligence

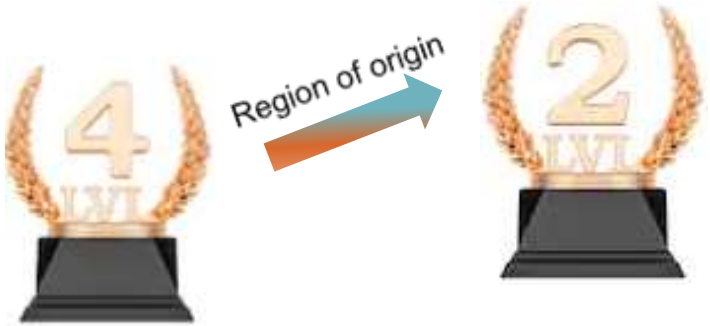
Unprompted awareness demonstrates good knowledge of Australian regions

Prompted region awareness Percentage who have heard of following regions	
Barossa Valley	47%
Hunter Valley	47%
Margaret River	39%
Yarra Valley	37%
Coonawarra	33%
Great Southern	32%
Eden Valley	30%
Adelaide Hills	29%
Clare Valley	28%
McLaren Vale	27%
Mornington Peninsula	27%
Tasmania	27%
Langhorne Creek	26%
Rutherglen	22%
Grampians	19%

Unprompted region awareness Top 15 responses	
Barossa Valley 巴罗萨河谷	44%
Hunter Valley 猎人谷	32%
Coonawarra 库纳瓦拉	27%
Southern Australia 南澳州	19%
Yarra Valley 雅拉谷	17%
Margaret River 玛格丽特河	16%
Riverland 河地	13%
McLaren Vale 迈拉仑维尔谷	13%
Clare Valley 克莱尔谷	11%
Victoria 维多利亚	10%
Western Australia 西澳	9%
Tamar Valley 泰玛谷	7%
New South Wales 新南威尔士	7%
Riverina 滨海沿岸	6%
Tasmania 塔斯马尼亚	4%

Engaged Explorers

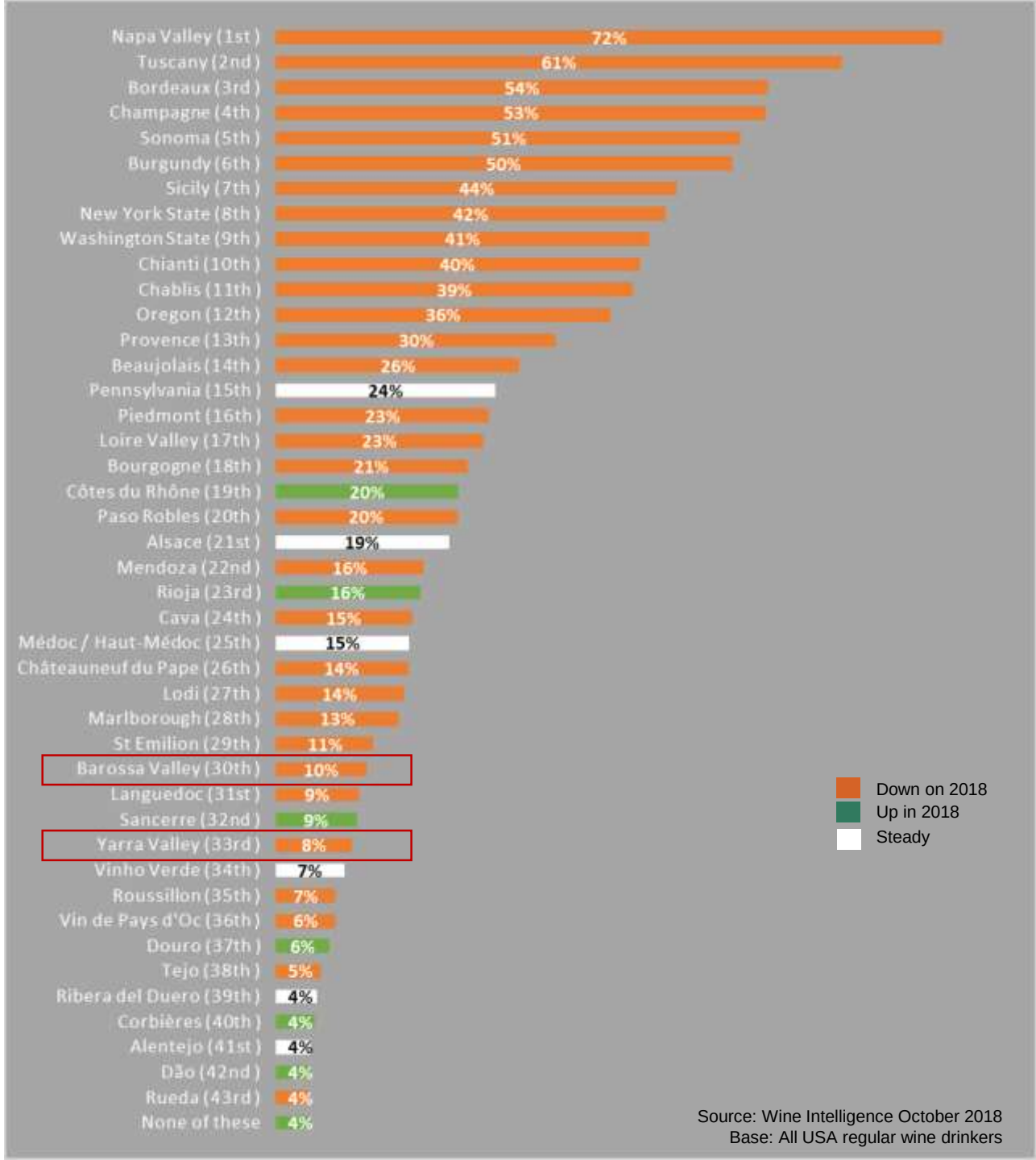
Have been to Australia for a holiday and went to a winery



Source: Wine Intelligence
Base: All Chinese upper middle class imported wine drinkers n=1,000

Awareness of regions in USA market is quite low

- **Barossa Valley – 10% aware, 2% have drunk in the past 3 months (fallen since July 18)**
- **Yarra Valley – 8% aware, 2% have drunk in the past 3 months (fallen since July 18)**
- **1 in 6 of those that were aware of the two Australian regions drank the wine.**
- **Napa Valley – 72% aware, 43% have drunk in the past 3 months (fallen since July 18)**



Awareness of most regions has grown in the long term

Prompted region awareness % who have heard of following regions Base= All US regular wine drinkers	Mar-08 n=2,019	Nov-13 n=2,018	Mar-15 n=2,016	Jul-18 n=2,000	2008 vs 2018	2013 vs 2018	2015 vs 2018
Eden Valley	16%	20%	16%	22%	↑	→	↑
Tasmania	23%	20%	19%	18%	↓	→	→
Barossa Valley	9%	14%	13%	17%	↑	↑	↑
Hunter Valley	14%	23%	13%	16%	↑	↓	↑
Adelaide Hills	10%	13%	10%	16%	↑	↑	↑
Clare Valley	8%	11%	8%	15%	↑	↑	↑
Yarra Valley	9%	14%	9%	15%	↑	→	↑
Langhorne Creek	8%	11%	8%	13%	↑	→	↑
Great Southern	8%	11%	7%	11%	↑	→	↑
McLaren Vale	5%	8%	5%	10%	↑	↑	↑
Margaret River	5%	11%	6%	9%	↑	↓	↑
Coonawarra	9%	8%	7%	8%	→	→	→
Mornington Peninsula	2%	6%	3%	7%	↑	→	↑
Rutherglen	3%	5%	2%	5%	↑	→	↑
Grampians	2%	6%	3%	5%	↑	→	↑
Other	n/a	n/a	n/a	3%	n/a	n/a	n/a
None of these	58%	46%	55%	42%	↓	↓	↓

→: statistically no significant change compared to previous wave(s)
↑: statistically significantly higher than previous wave(s) at a 95% confidence level
↓: statistically significantly lower than previous wave(s) at a 95% confidence level

Source: Wine Intelligence

Unprompted responses highlight low awareness and lack of knowledge

Prompted region awareness Percentage who have heard of following regions	
Eden Valley	22%
Tasmania	18%
Barossa Valley	17%
Hunter Valley	16%
Adelaide Hills	16%
Clare Valley	15%
Yarra Valley	15%
Langhorne Creek	13%
Great Southern	11%
McLaren Vale	10%
Margaret River	9%
Coonawarra	8%
Mornington Peninsula	7%
Rutherglen	5%
Grampians	5%

Unprompted region awareness Top 15 responses	
Yellow Tail	6%
Sydney	5%
Brands	5%
Barossa Valley	5%
Varietals	5%
Adelaide Hills	5%
Countries	4%
South Australia	4%
Clare Valley	3%
Queensland	2%
Victoria	2%
New South Wales	2%
Eden Valley	2%
Adelaide	2%
Melbourne	2%

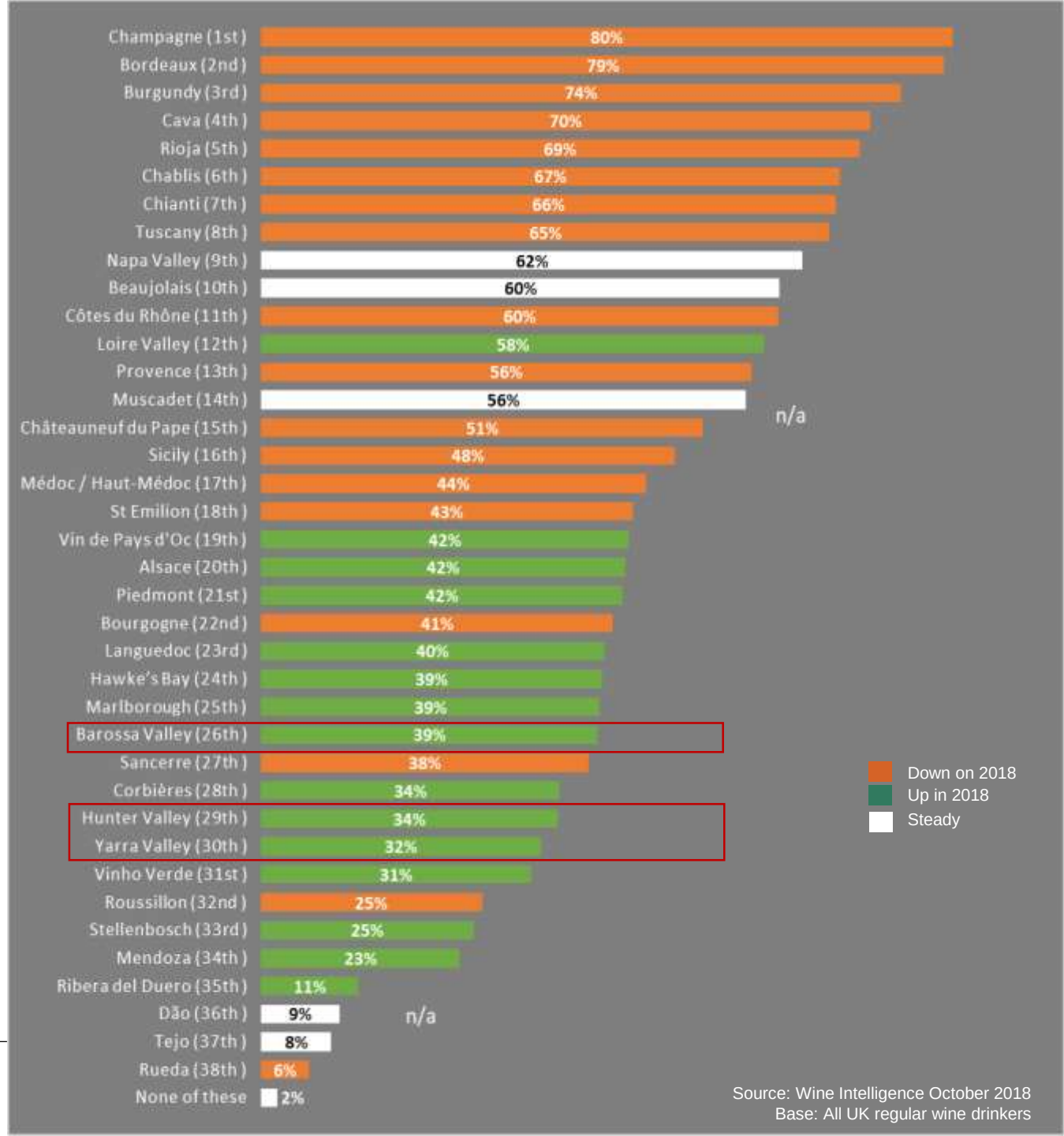
Engaged Explorers

Have been to Australia for a holiday and went to a winery

Source: Wine Intelligence
Base: All USA regular wine drinkers

Awareness of regions in UK market is low but growing

- **Barossa Valley – 39% aware, 6% have drunk in the past 3 months (up since 2017)**
- **Hunter Valley – 34% aware, 6% have drunk in the past 3 months (up since 2017)**
- **Yarra Valley – 32% aware, 4% have drunk in the past 3 months (up since 2017)**
- **1 in 6 of those that were aware of the three Australian regions drank the wine.**
- **Champagne – 80% aware, 19% have drunk in the past 3 months (steady on 2017)**



Awareness of most regions has been steady in the short term

Prompted region awareness % who have heard of following regions Base= All UK regular wine drinkers	2008 n=1,020	2013 n=1,492	2015 n=666	2008 vs 2015	2013 vs 2015
Hunter Valley	31%	46%	44%	↑	↓
Barossa Valley	32%	42%	41%	↑	→
Yarra Valley	27%	38%	39%	↑	→
Tasmania	22%	27%	30%	↑	→
Eden Valley	28%	28%	27%	→	→
Adelaide Hills	21%	19%	20%	→	→
Coonawarra	26%	25%	19%	↓	↓
Langhorne Creek	15%	16%	16%	→	→
Grampians	10%	12%	12%	→	→
Clare Valley	12%	13%	12%	→	→
Margaret River	10%	14%	12%	→	→
Great Southern	9%	13%	11%	→	→
McLaren Vale	9%	12%	9%	→	→
Mornington Peninsula	5%	7%	9%	↑	→
Rutherglen	5%	7%	8%	↑	→
None of these	30%	22%	21%	↓	→

→: statistically no significant change compared to previous wave(s)
↑: statistically significantly higher than previous wave(s) at a 95% confidence level
↓: statistically significantly lower than previous wave(s) at a 95% confidence level

Source: Wine Intelligence

Tourism

Limited ability currently to track visitors nationally to wineries

Tourism Research Australia – National and International Visitor Surveys

- **Activity – visit wineries**
- **Wine Australia regions**
- **Places visited**
- **Supplementary questions**
  - National - 2014 and 2015 (IVS only)
  - NSW only - 2016 onwards
  - National – 2017 onwards
  - National – 2018 onwards

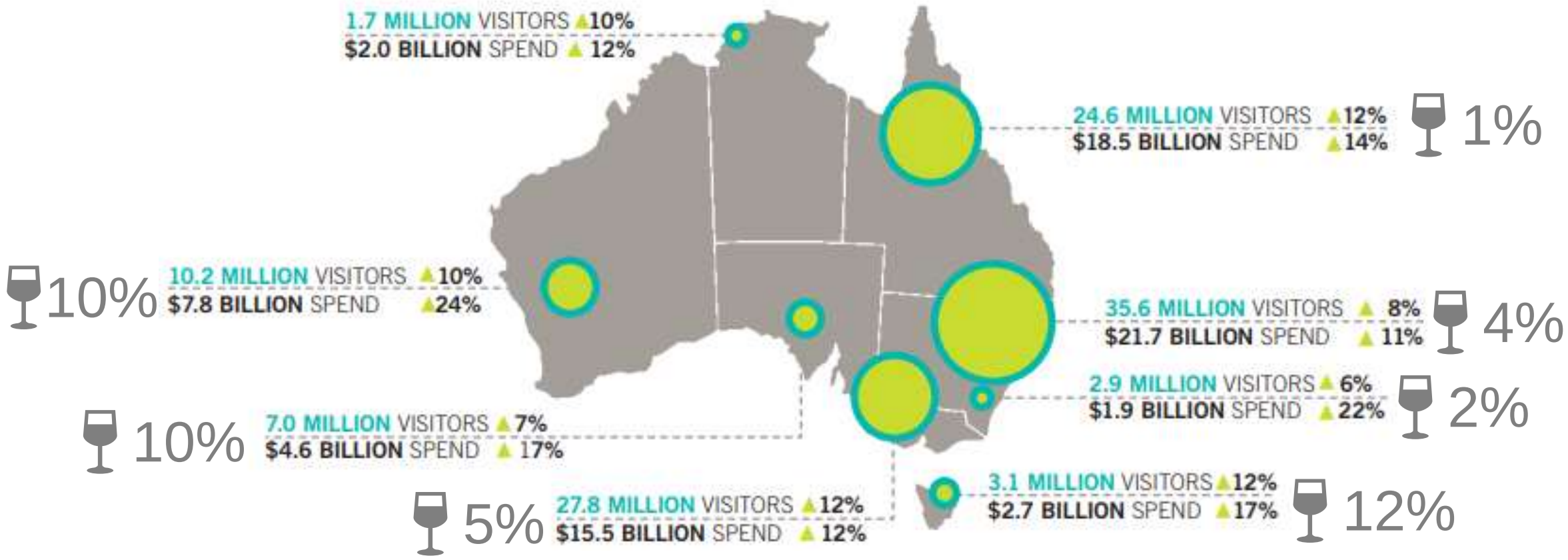
International

- Wine supplementary
  - Did you visit a NSW winery (2016 onwards)
  - Location of the winery visited (NSW Only 2016 onwards)
  - Activity at wineries - visited NSW winery (2017 onwards)
  - Wine supplementary (2014 and 2015)
    - Number of wineries visited on this trip
    - Did you visit any wineries on this trip
    - Type of restaurant or cafe eat or drink at
    - How much did you spend on wine purchased at wineries
    - How satisfied were you with the wine in Australia
    - Reason dissatisfied with wine
    - Activities undertaken at winery
  - Wine supplementary (2017 onwards)
    - Activity at wineries
    - Spend on the wine to take home
  - Wine supplementary (2018)
    - Wine regions visited (2018)
    - Expenditure included purchase of Australian wine
    - Location of winery visited
    - Spend on wine consumed in Australia
    - Spend on Australian wine to take home
    - How likely to recommend services, products or experiences in the wine regions visited
    - Time spent at wineries (2019 onwards)
- Winery/brewery or distillery (2018)
  - Visited wineries, breweries or distilleries
  - Location of brewery visited
  - Location of distillery visited

Domestic overnight

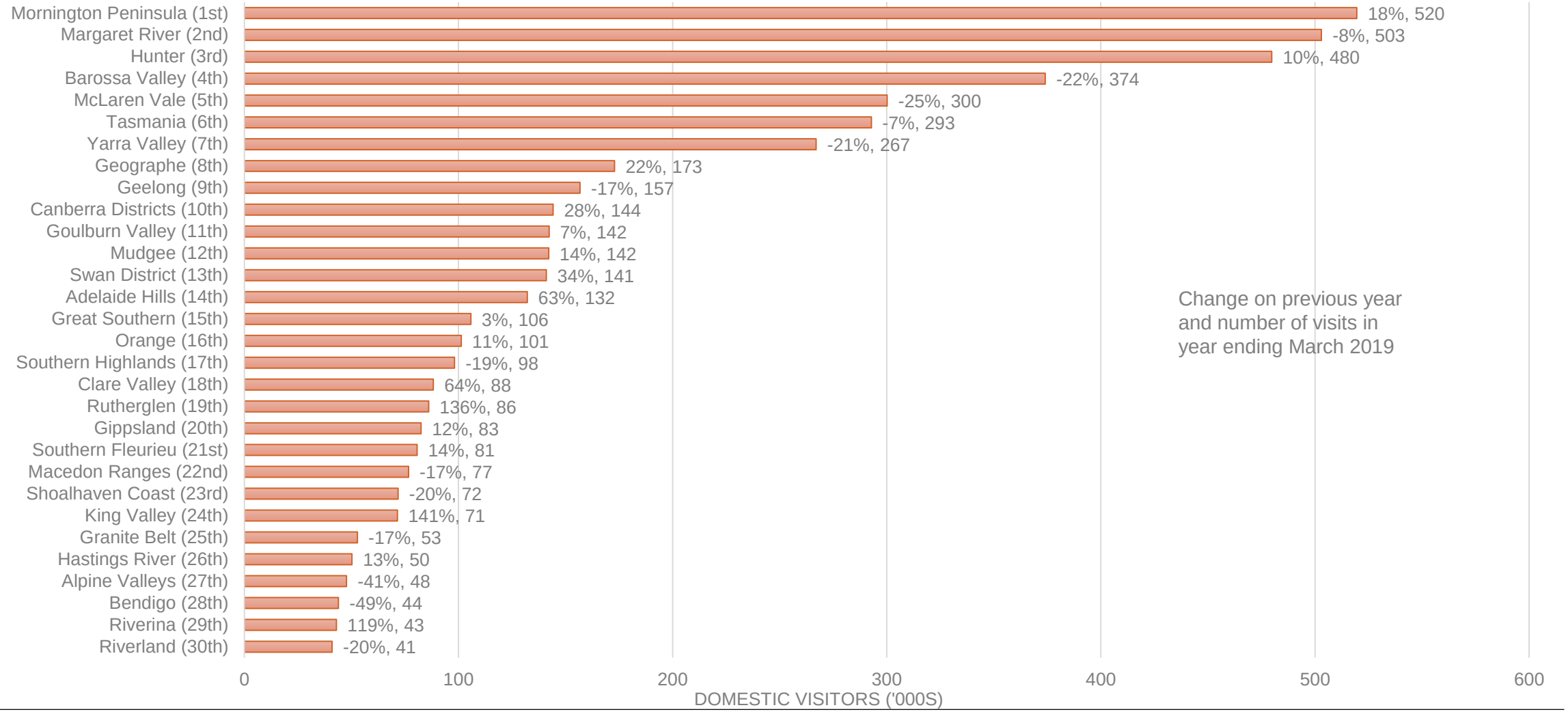
- Food and Wine
  - Types of eateries (2016)
  - Food Experience (2017 onwards)
  - Food experience location (2017 onwards)
  - NSW winery supplementary
    - Activities at NSW wineries (2017 onwards)
    - Spend on wine to take home (2017 onwards)
    - Location of NSW winery (2016 onwards)
    - Visited NSW winery (2016 onwards)
  - VIC winery supplementary
    - Location of Victoria winery
  - Visitation to winery brewery and distillery (2018)
    - Visited winery, brewery or distillery
    - Location of brewery visited
    - Location of distillery visited
    - State of winery visited
    - Winery activity
    - Time spent at wineries
    - Spend on wine (2018 onwards)

One in twenty Australians that stayed overnight, went to a winery



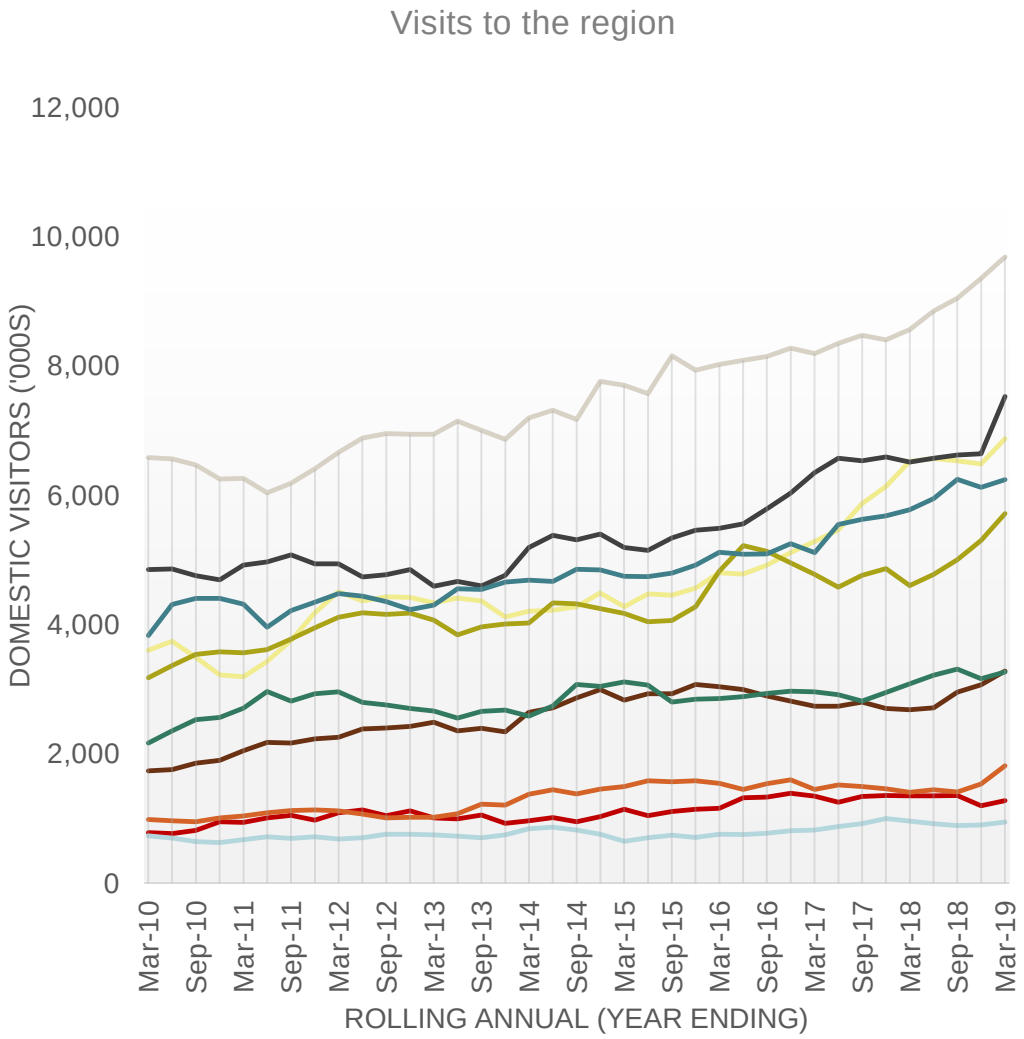
Source: Tourism Research Australia's National Visitor Survey, year ending March 2019

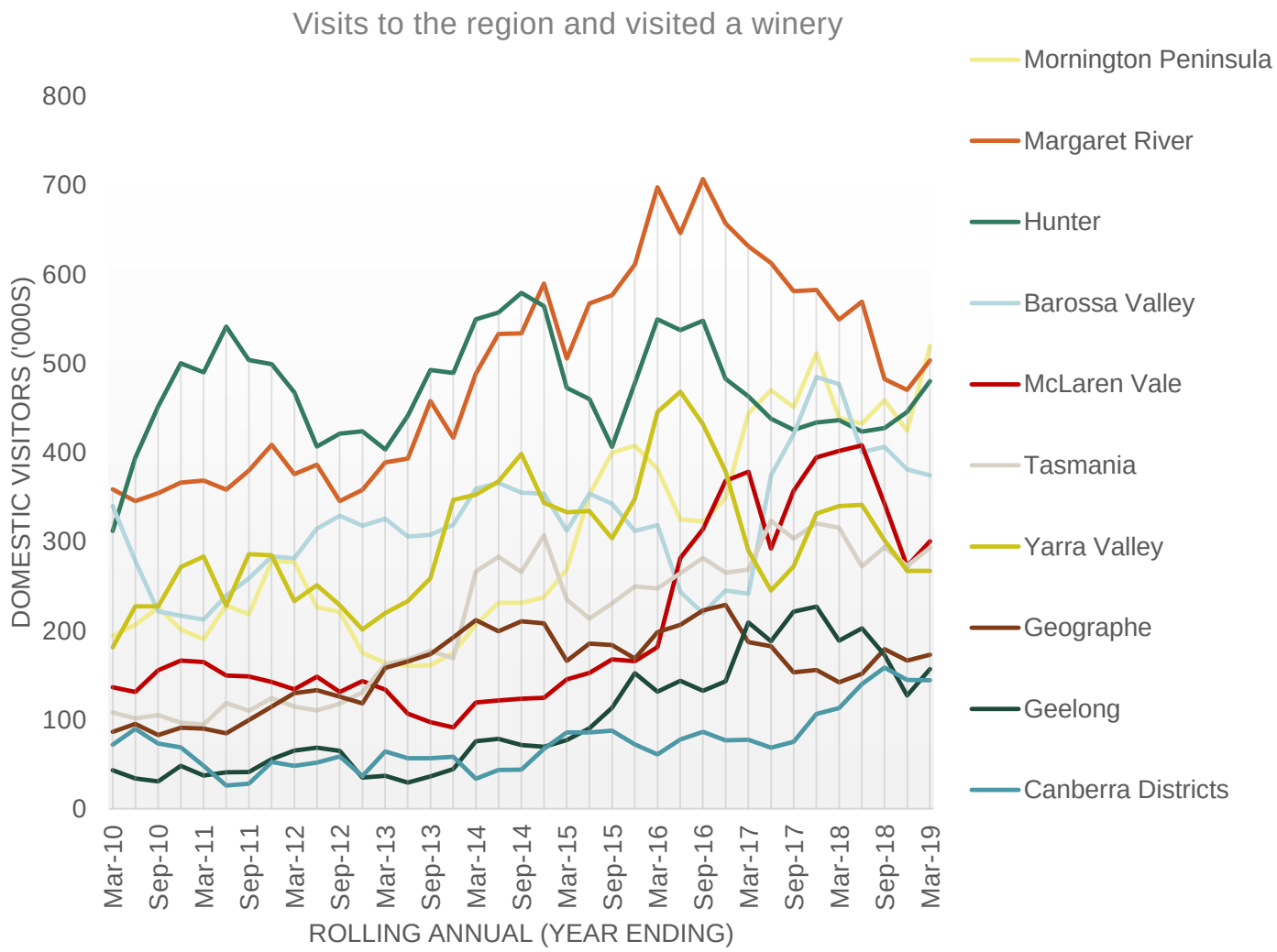
More Australians have been to Mornington Peninsula and Hunter in last twelve months and visited a winery



Source: Tourism Research Australia's National Visitor Survey, year ending March 2019

Opportunity exists to encourage more Australians in the region to visit a winery





Source: Tourism Research Australia's National Visitor Survey

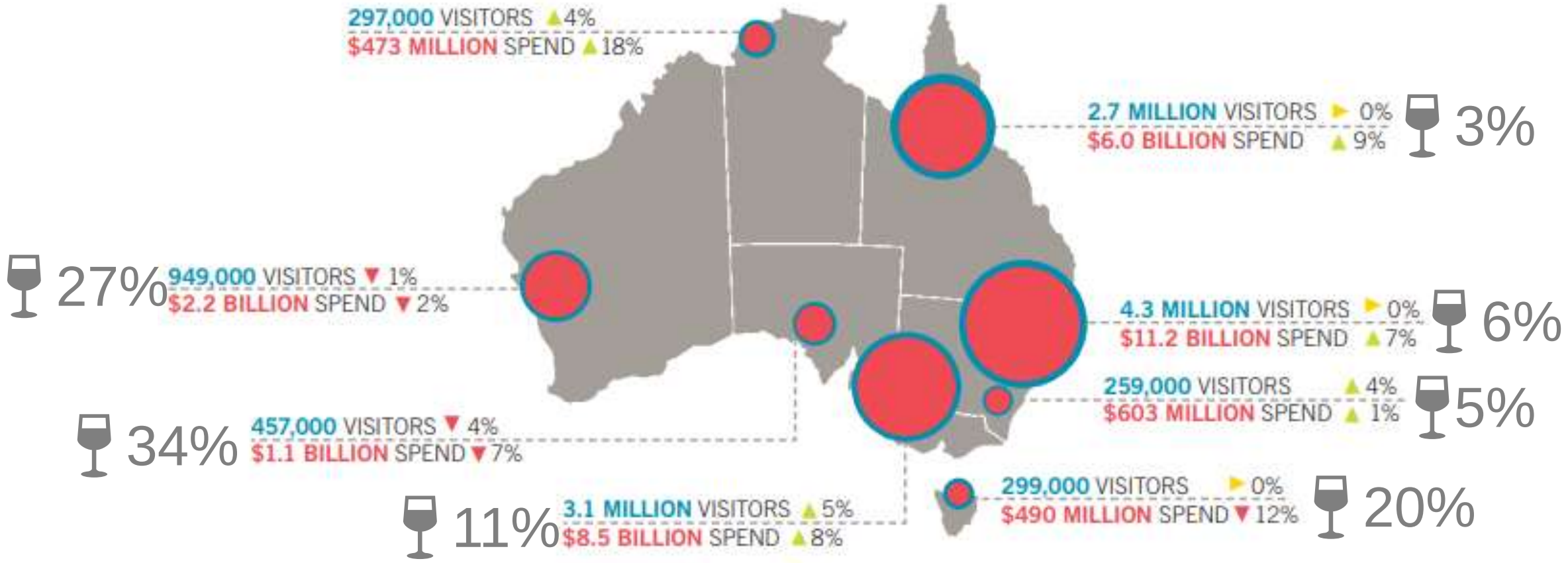
Around half spent $100 or more at wineries in Canberra Districts, McLaren Vale and Barossa Valley

Of the top 10 GI regions that were visited by Australians staying overnight:

- **Majority were from intrastate (60% or more)**
  - Except for Barossa Valley and Canberra Districts
- **Top three activities:**
  - Wine tasting
  - Purchasing wine to take home
  - Purchasing food at the winery
- **Time spent at winery:**
  - Most spent one to three hours at the winery
- **Spend on wine:**
  - A third or more spent $101-$500 in Barossa Valley, McLaren Vale, Hunter and Canberra.
  - For around a quarter of visitors to remaining regions, spend was between $51-$100.

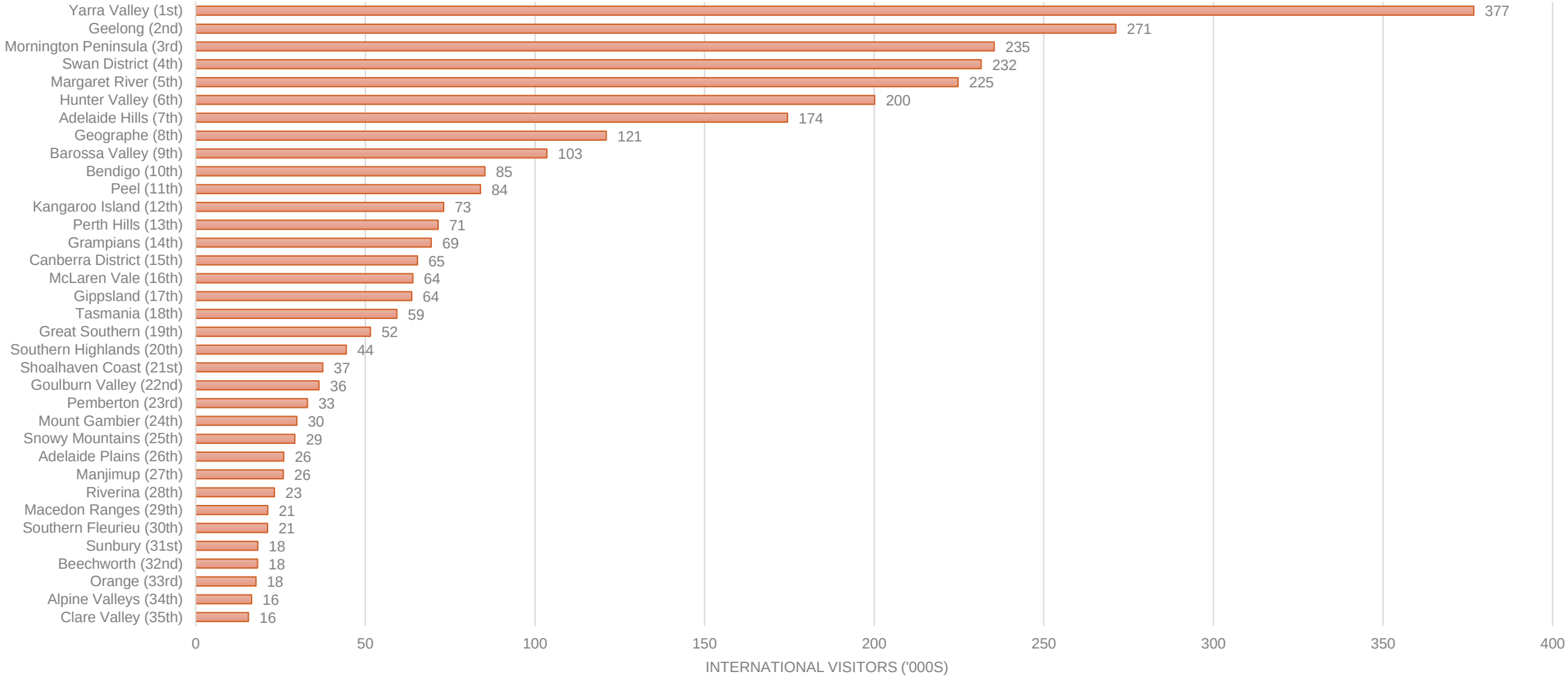
Source: Tourism Research Australia's National Visitor Survey, year ending March 2019

One in eight internationals, went to a winery



Source: Tourism Research Australia's International Visitor Survey, year ending March 2019

Internationals are more likely to visit wineries close to major gateways

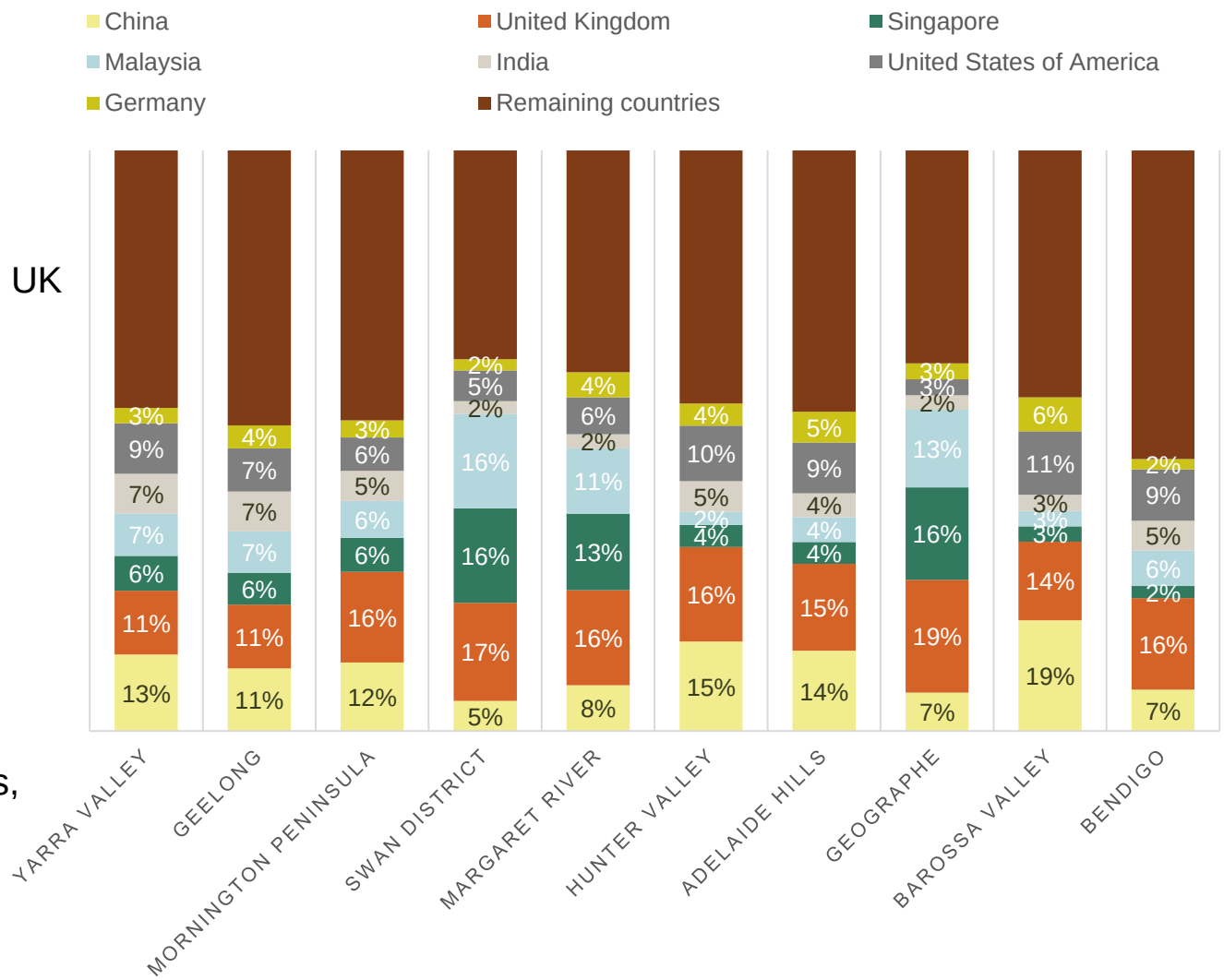


Source: Tourism Research Australia's International Visitor Survey, year ending March 2019

Around a third spent $100 or more across each of the top 10 wine regions

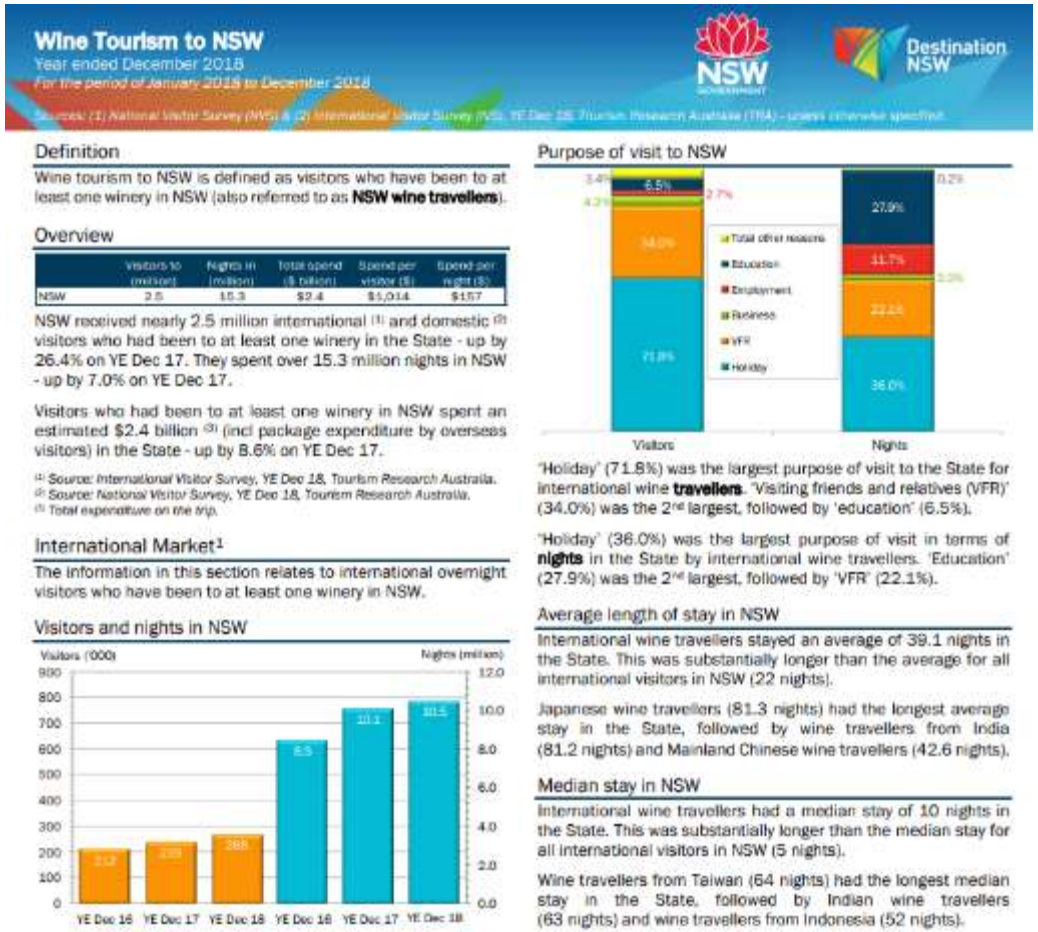
Of the top 10 GI regions that were visited by internationals:

- **Varied depending on which region was visited**
  - Yarra Valley had 13% from China and 11% from the UK
  - Margaret River had 16% from the UK, 13% from Singapore and 11% from Malaysia
- **Top three activities:**
  - Wine tasting
  - Purchasing wine to take home
  - Eat at a winery café/restaurant
- **Spend on wine consumed in Australia:**
  - A third or more spent $101-$500 in Barossa Valley, Hunter and Bendigo.
  - For around a quarter of visitors to remaining regions, spend was between $51-$100.



Source: Tourism Research Australia's International Visitor Survey, year ending March 2019

Regional profiles and wine tourism snapshots



Wine Tourism to NSW

Year ended December 2018

For the period of January 2018 to December 2018

Sources: (1) National Visitor Survey (NVS) & (2) International Visitor Survey (IVS), YE Dec 18, Tourism Research Australia (TRA) - unless otherwise specified

Definition

Wine tourism to NSW is defined as visitors who have been to at least one winery in NSW (also referred to as **NSW wine travellers**).

Overview

	Visitors to (million)	Nights in (million)	Total spend ($ billion)	Spend per visitor ($)	Spend per night ($)
NSW	2.5	15.3	$2.4	$1,014	$157

NSW received nearly 2.5 million international [1] and domestic [2] visitors who had been to at least one winery in the State - up by 26.4% on YE Dec 17. They spent over 15.3 million nights in NSW - up by 7.0% on YE Dec 17.

Visitors who had been to at least one winery in NSW spent an estimated $2.4 billion [3] (incl package expenditure by overseas visitors) in the State - up by 8.6% on YE Dec 17.

[1] Source: International Visitor Survey, YE Dec 18, Tourism Research Australia.
[2] Source: National Visitor Survey, YE Dec 18, Tourism Research Australia.
[3] Total expenditure on the trip.

International Market[1]

The information in this section relates to international overnight visitors who have been to at least one winery in NSW.

Visitors and nights in NSW

Purpose of visit to NSW

'Holiday' (71.8%) was the largest purpose of visit to the State for international wine **travellers**. 'Visiting friends and relatives (VFR)' (34.0%) was the 2nd largest, followed by 'education' (6.5%).

'Holiday' (36.0%) was the largest purpose of visit in terms of **nights** in the State by international wine travellers. 'Education' (27.9%) was the 2nd largest, followed by 'VFR' (22.1%).

Average length of stay in NSW

International wine travellers stayed an average of 39.1 nights in the State. This was substantially longer than the average for all international visitors in NSW (22 nights).

Japanese wine travellers (81.3 nights) had the longest average stay in the State, followed by wine travellers from India (81.2 nights) and Mainland Chinese wine travellers (42.6 nights).

Median stay in NSW

International wine travellers had a median stay of 10 nights in the State. This was substantially longer than the median stay for all international visitors in NSW (5 nights).

Wine travellers from Taiwan (64 nights) had the longest median stay in the State, followed by Indian wine travellers (63 nights) and wine travellers from Indonesia (52 nights).

BAROSSA

REGIONAL PROFILE

ACCOMMODATION SUPPLY

Hotels, Motels and Service Apartments with 15+ rooms	
Establishments	9
Rooms	365
Occupancy	59%
Takings	$14,000,000

- Average occupancy for the year is 59 per cent over 9 establishments and 365 rooms.
- The peak months are October with occupancy of 71 per cent and March and April with Occupancy of 67 per cent.
- Low point of the year is during the winter months with occupancy on average dropping to 53 per cent. December is also low at 50 per cent.

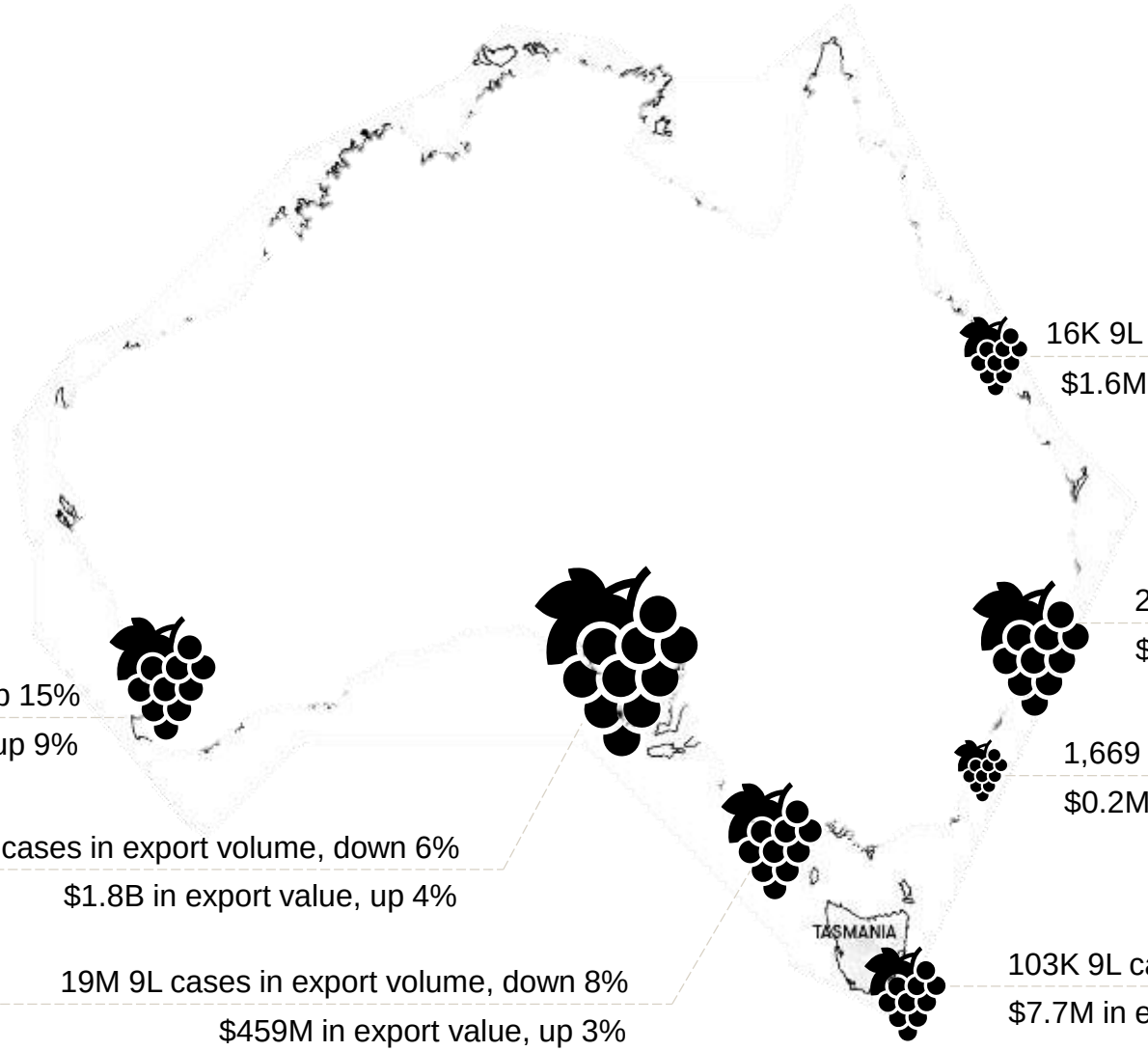
Monthly Occupancy Rates Year end June 2016 - Barossa

Total Overnight Visitation to Barossa & South Australia

Exports

Estimate of overall state by state exports in 2018-19

Please note: This estimate is arrived upon by summing all regional label claims for each respective state and attributing the ‘South Eastern Australia’ label claim and ‘no label claim’ exports to each state according to share of winegrape crush.



16K 9L cases in export volume, down 26%
$1.6M in export value, up 60%

26M 9L cases in export volume, down 4%
$532M in export value, up 3%

1,669 9L cases in export volume, down 51%
$0.2M in export value, down 32%

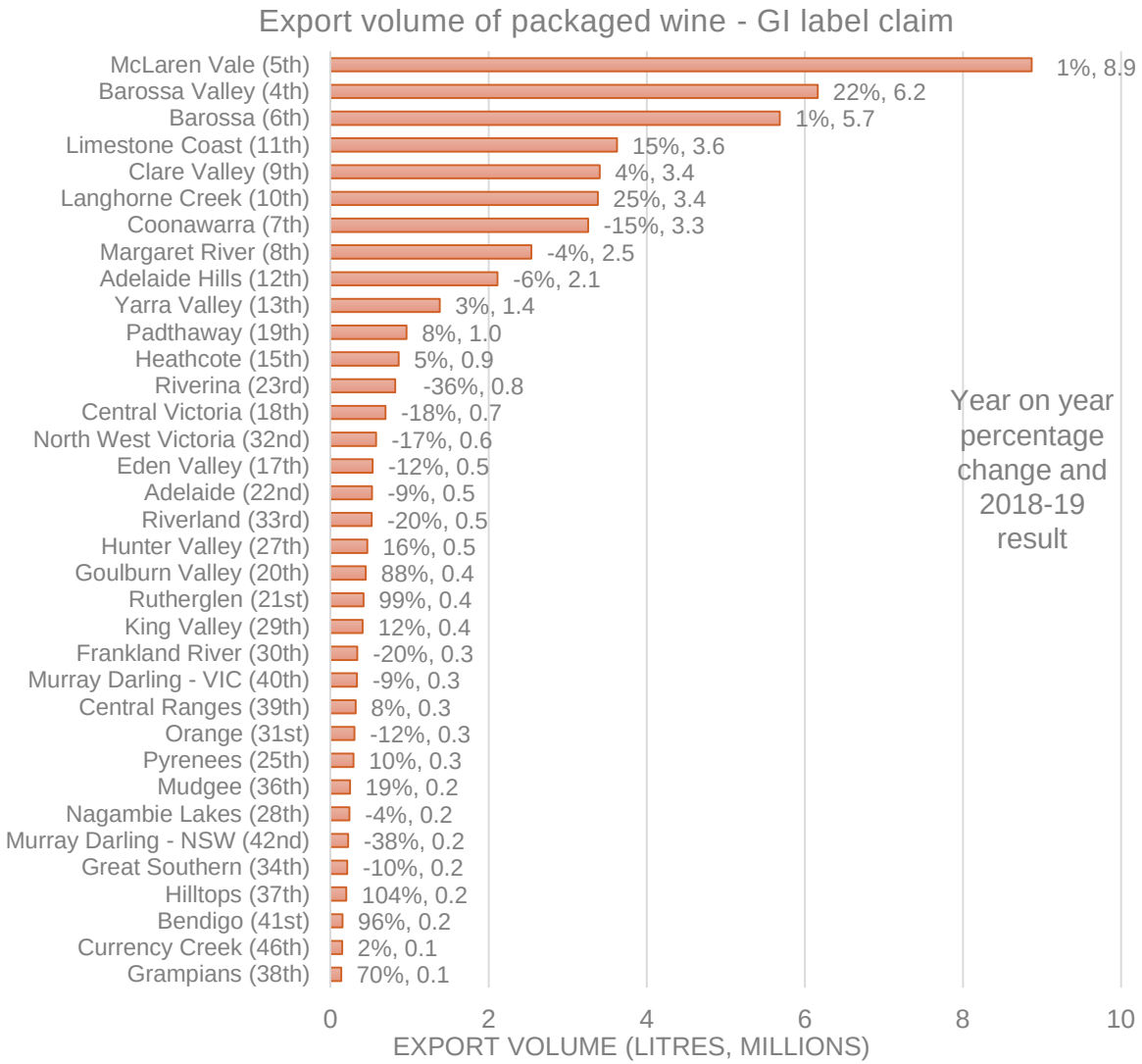
103K 9L cases in export volume, up 3%
$7.7M in export value, up 6%

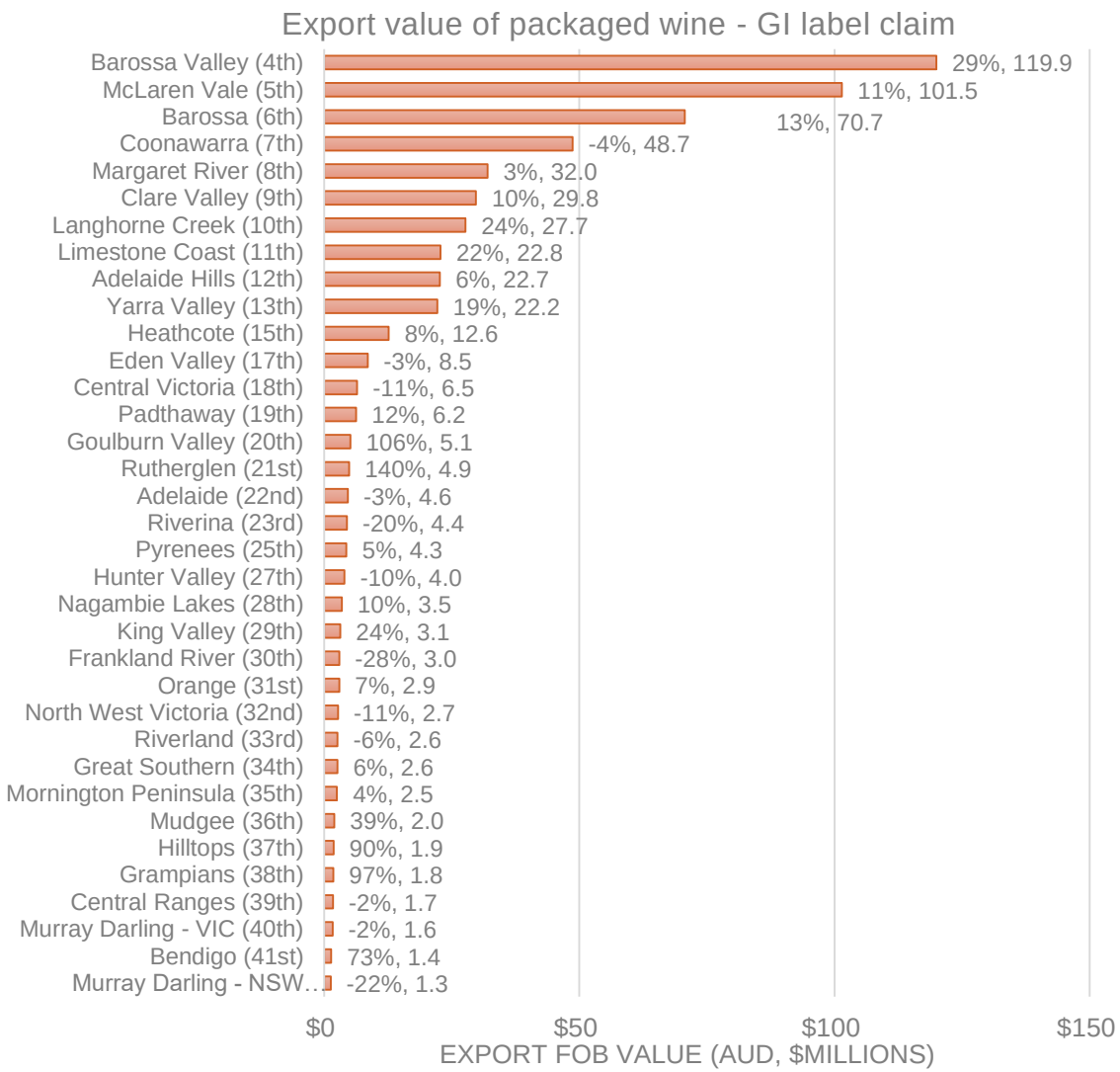
1.1M 9L cases in export volume, up 15%
$68M in export value, up 9%

43M 9L cases in export volume, down 6%
$1.8B in export value, up 4%

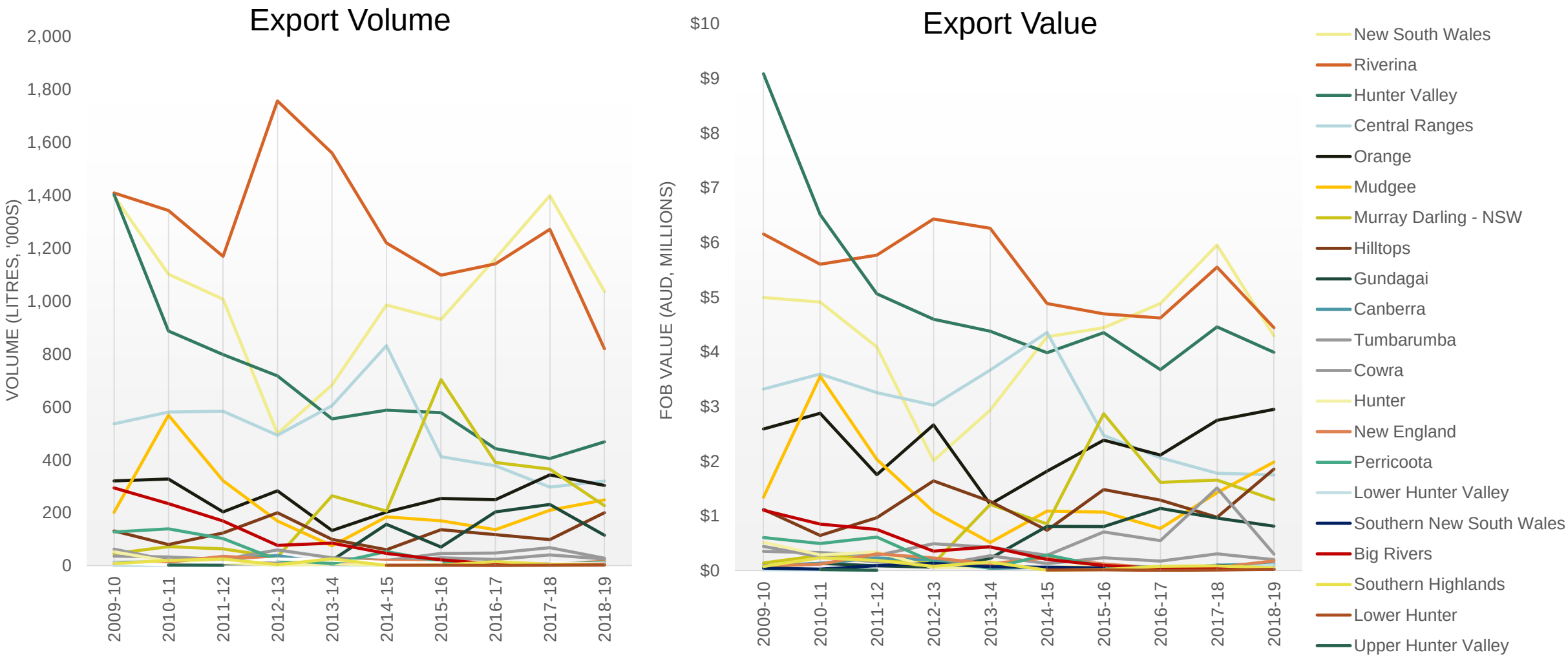
19M 9L cases in export volume, down 8%
$459M in export value, up 3%

GI region benchmarking by export volume and value

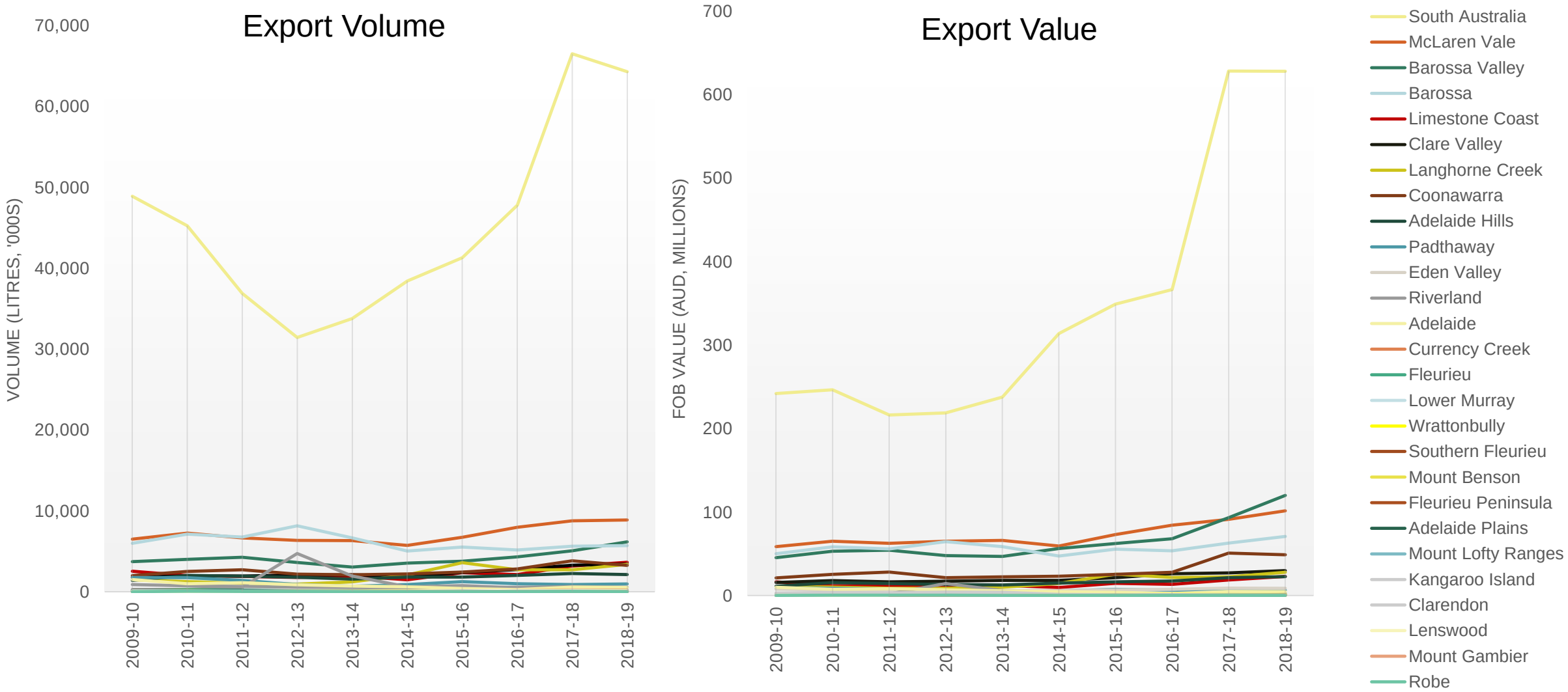




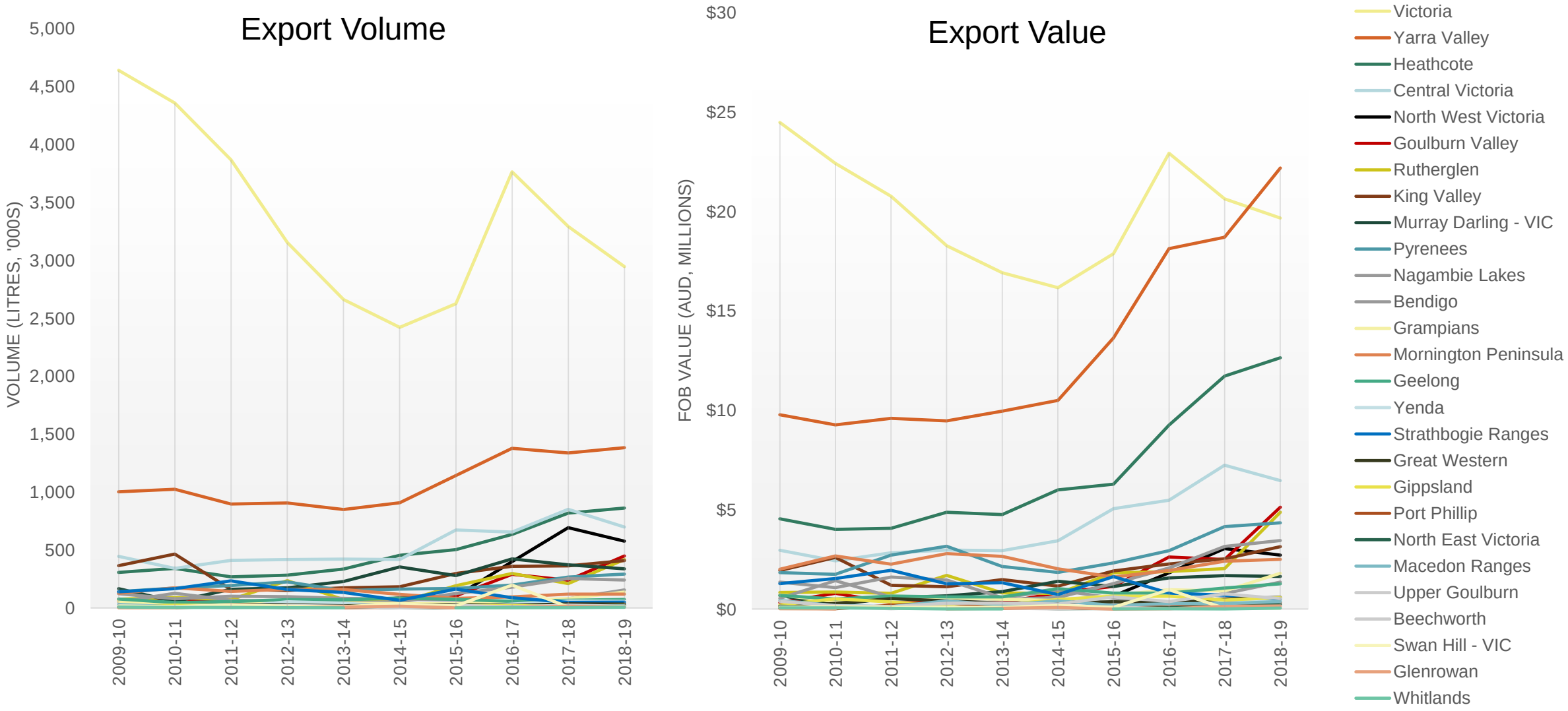
Exports of packaged wine based on NSW GI region label claims



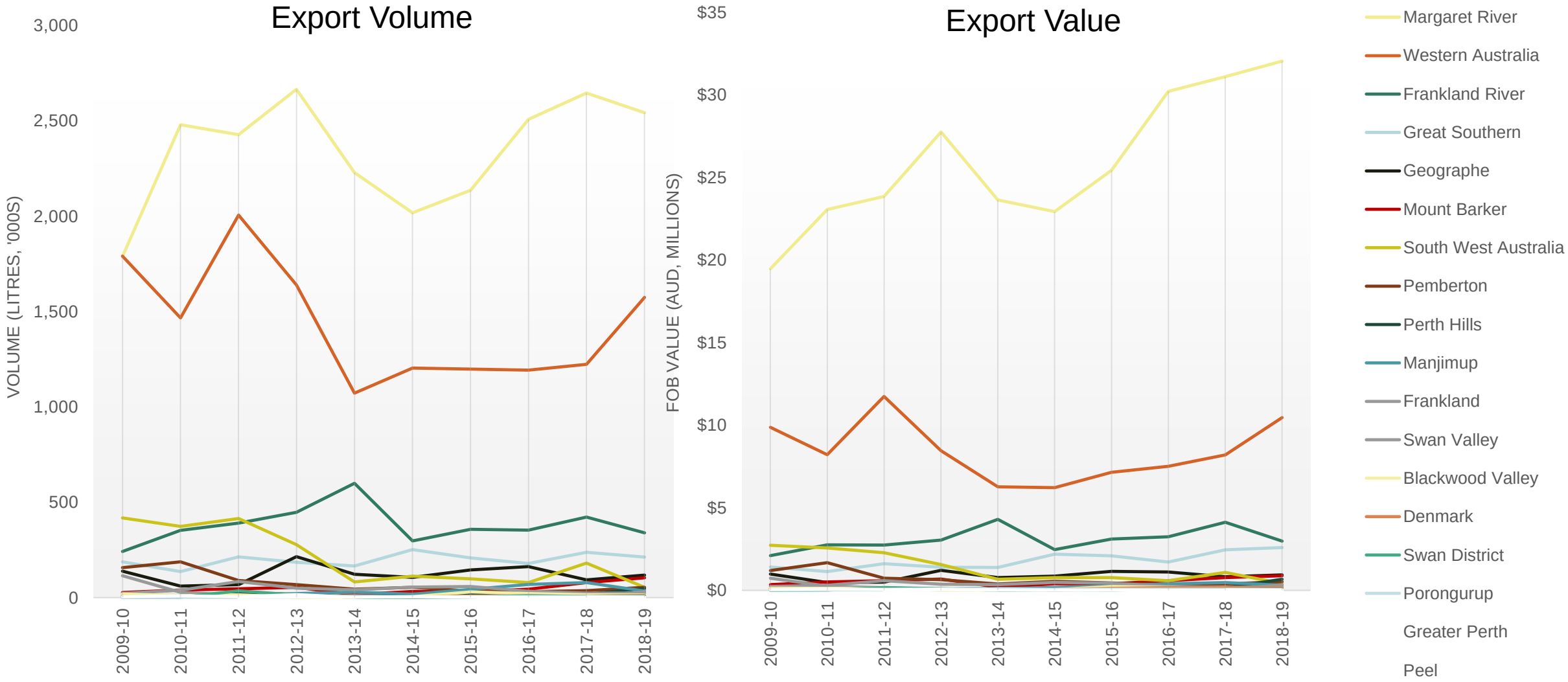
Exports of packaged wine based on SA GI region label claims



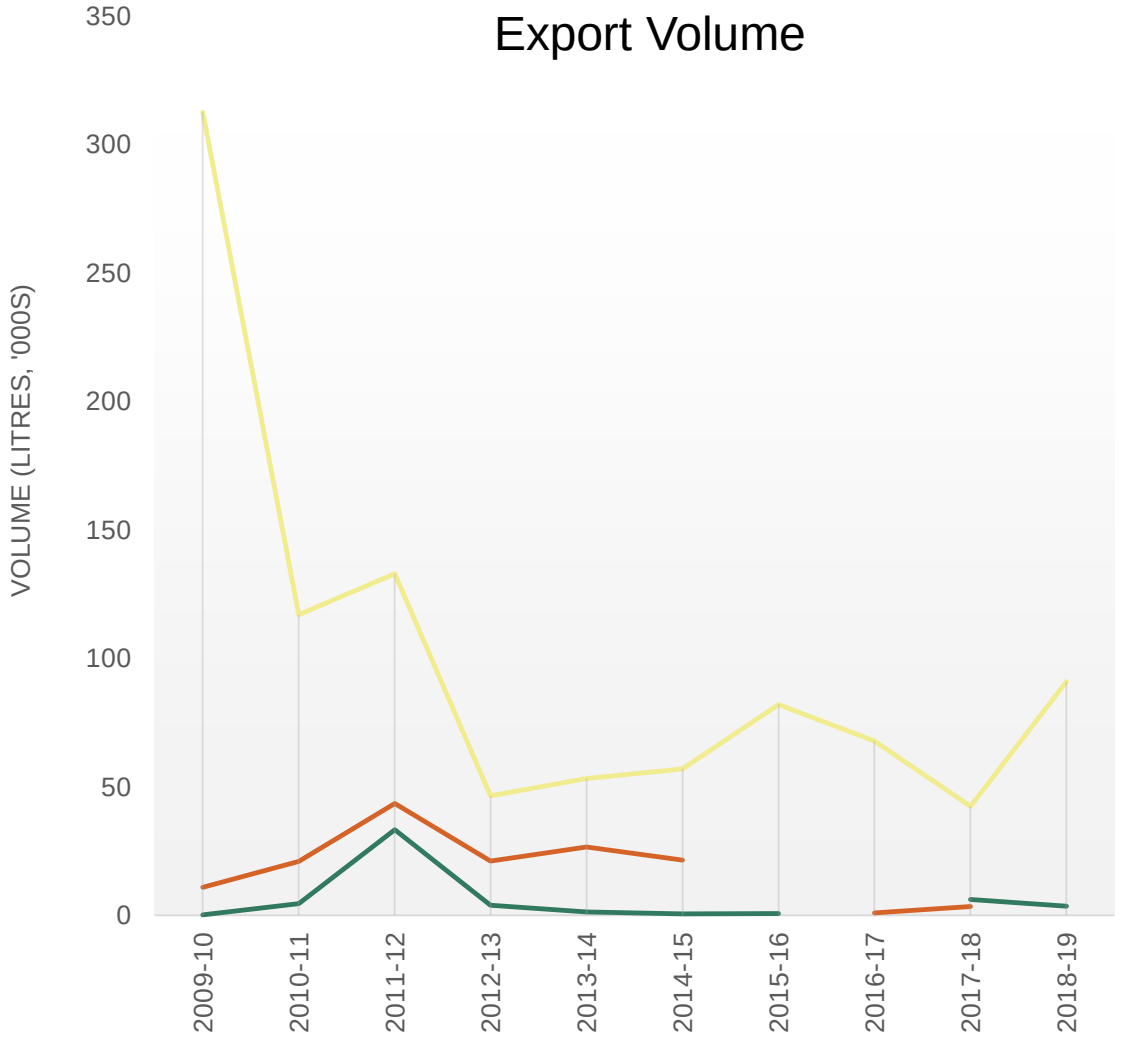
Exports of packaged wine based on VIC GI region label claims

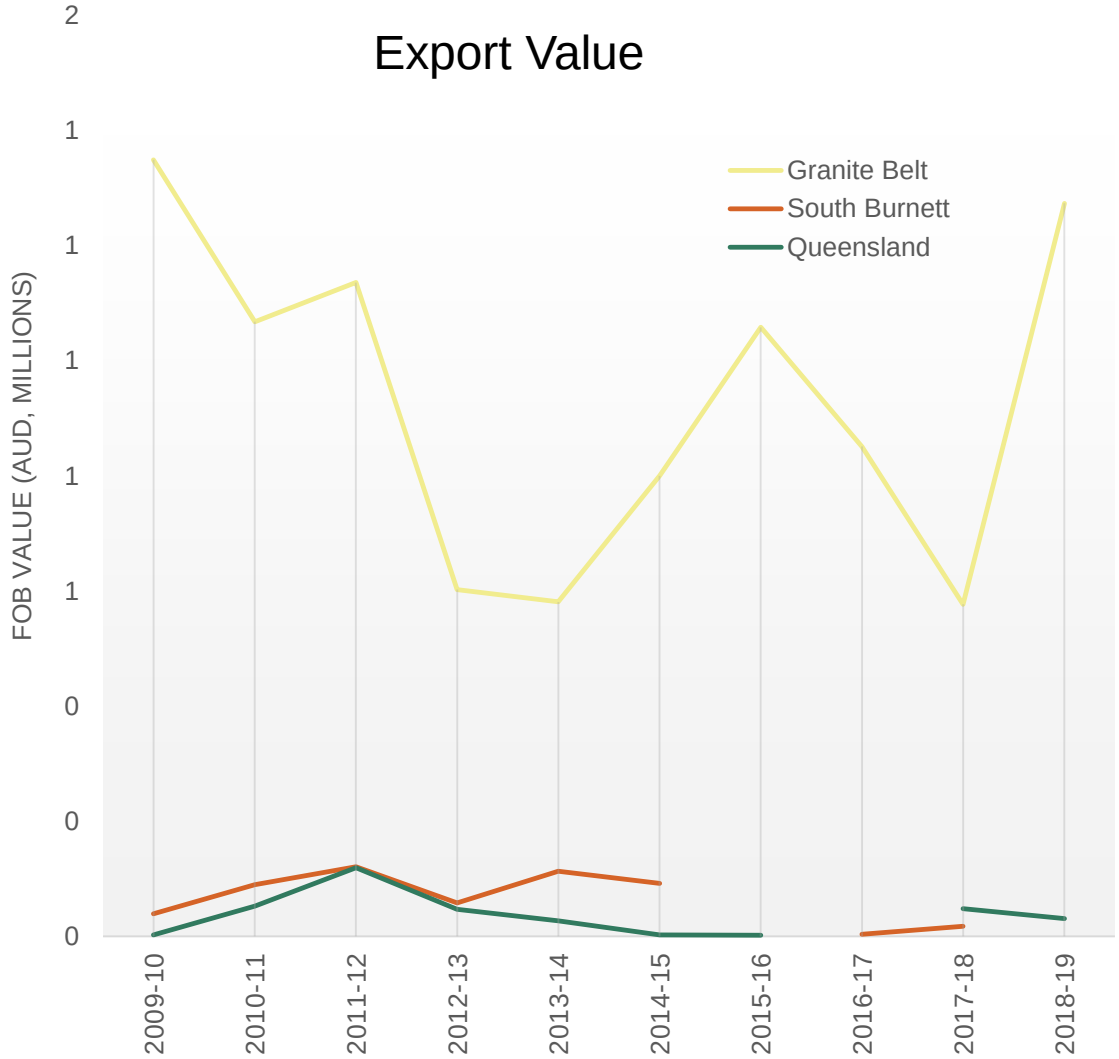


Exports of packaged wine based on WA GI region label claims

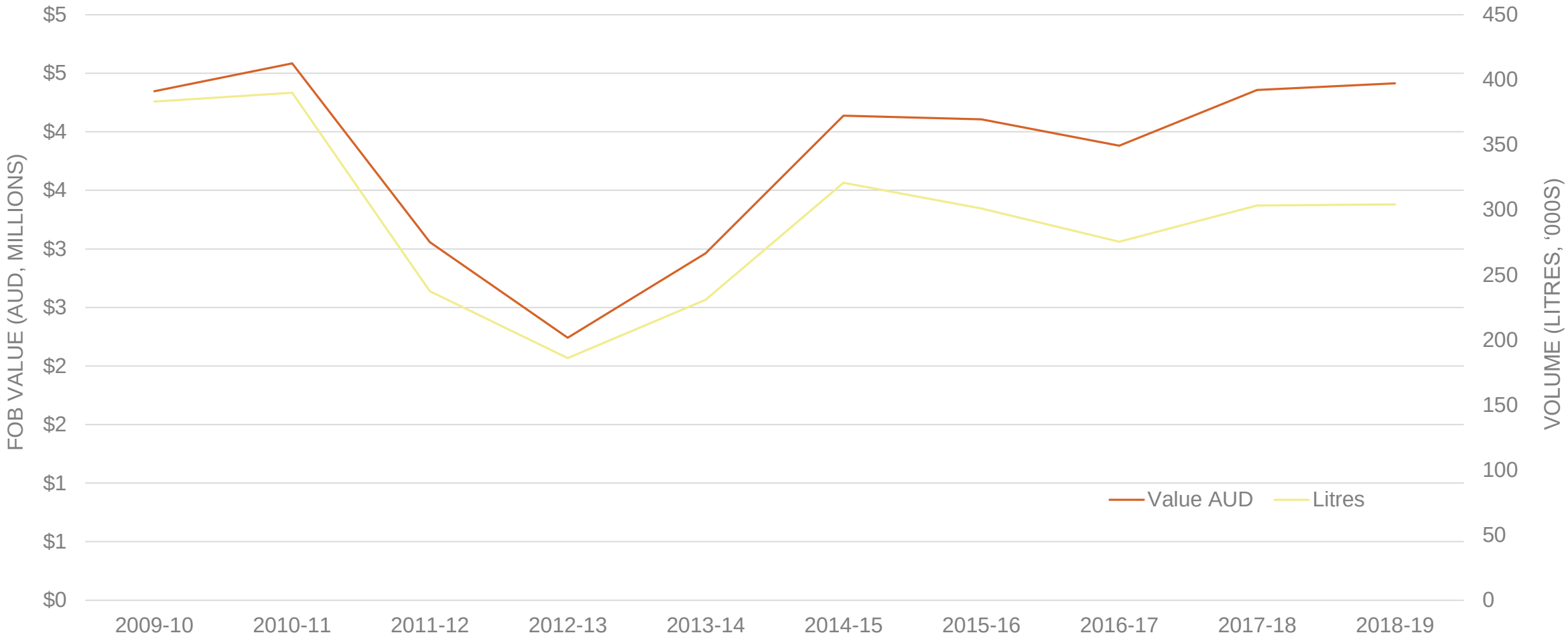


Exports of packaged wine based on QLD GI region label claims

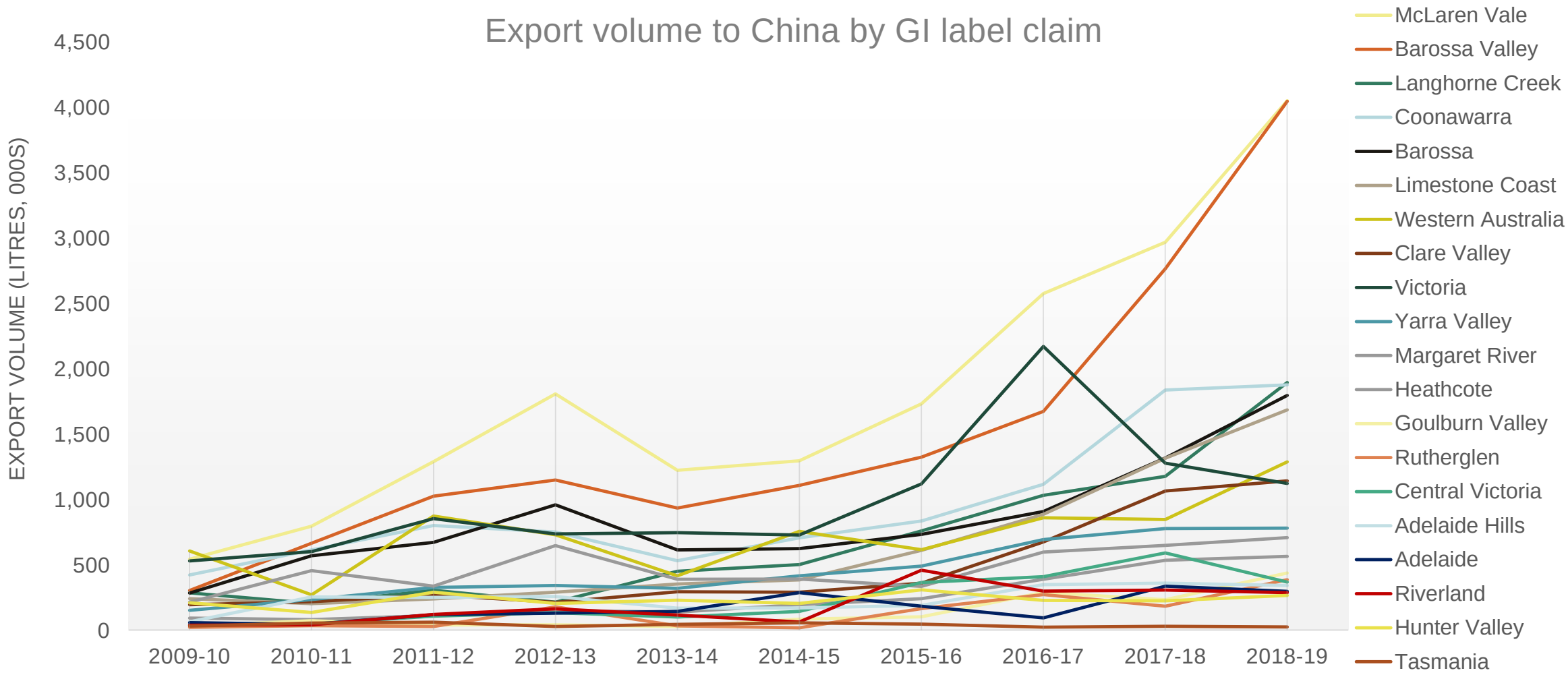




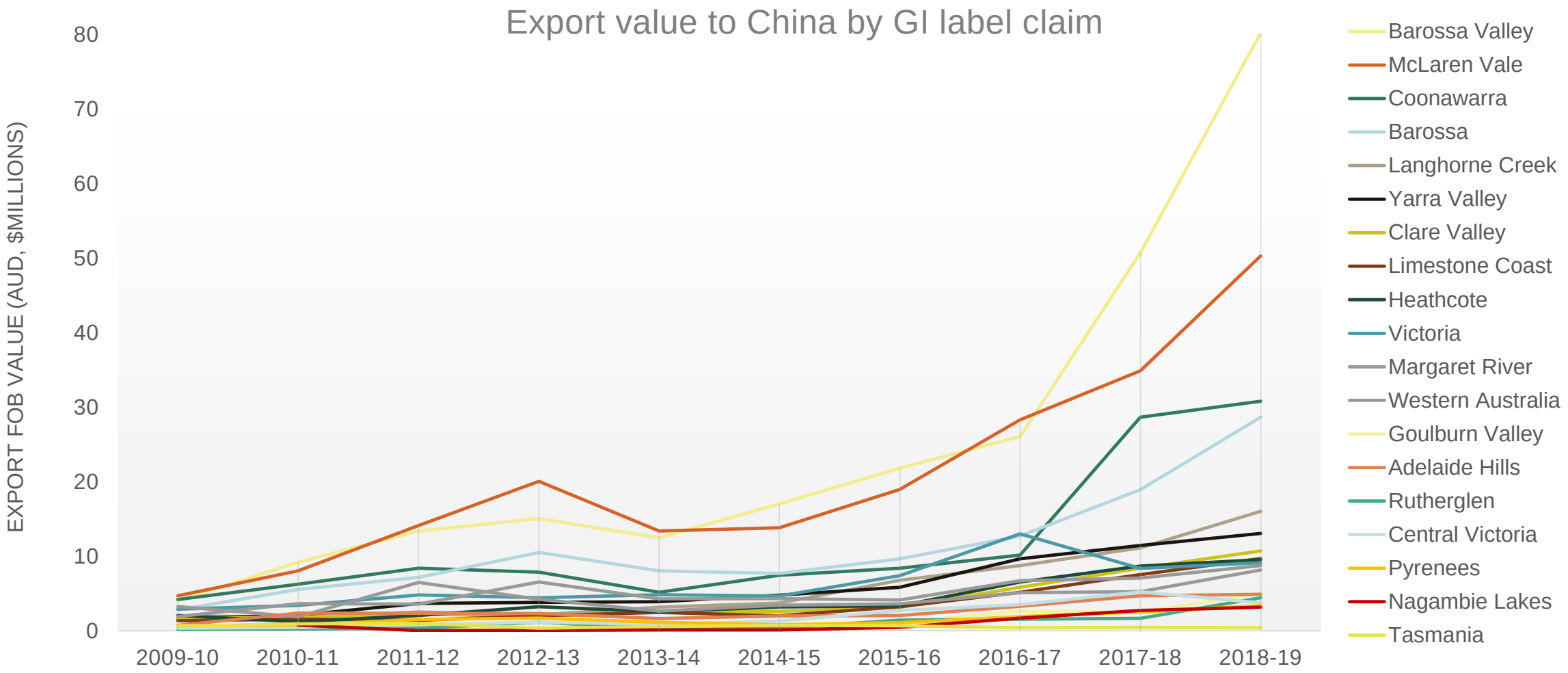
Exports of packaged wine based on TAS GI region label claims



Some regions are more dominant in China than others



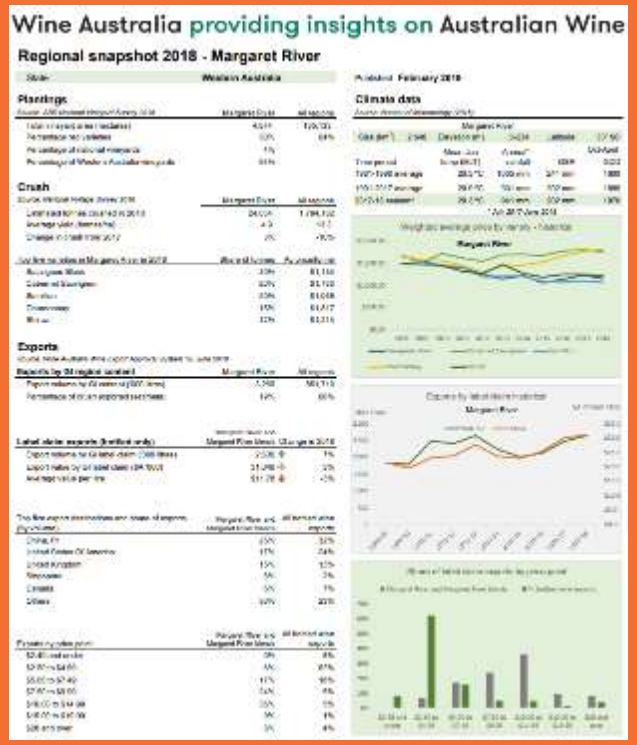
China export value has risen sharply for a number of regions in the last two years



Resources

Regional reporting

Regional snapshots


Wine Australia providing insights on Australian Wine

Regional snapshot 2018 - Margaret River

Plantings

Crush

Exports

Climate data

Regional infographic

Crush and price dispersion

Table 5: Crush by state and region 2019[11]

Region	Tonnes purchased	Winery grown fruit	Winery grown share	Total collected tonnes	Share of national crush	Number of respondents[12]
Murray Darling - Swan Hill	**243,430**	**102,424**	**30%**	**345,854**	**22.4%**	**33**
Murray Darling - Swan Hill	243,430	102,424	30%	345,854	22.4%	33
New South Wales (exc. MD-SH)	**221,195**	**99,746**	**31%**	**320,941**	**20.7%**	**85**
Big Rivers zone other	1,678	4,010	71%	5,688	0.4%	3
Canberra District	110	405	79%	515	0.0%	12
Central Ranges zone other	3,259	430	12%	3,689	0.2%	8
Cowra	2,939		0%	2,939	0.2%	3
Gundagai	3,465	47	1%	3,512	0.2%	9
Hastings River	4	2	36%	6	0.0%	2
Hilltops	1,235	564	31%	1,800	0.1%	16

Regional reports

All state GI claims

Location claim	Volume (000 litres)	Change	Value (000 AUD)	Change	Average Value AUD per litre	Change
New South Wales	1,036	26%	$4,266	28%	$4.14	3%
Riverina	818	36%	$4,439	20%	$5.42	24%
Hunter Valley	467	16%	$3,986	-10%	$8.53	-23%
Central Ranges	319	8%	$1,745	-2%	$5.47	-9%
Orange	302	-12%	$2,946	7%	$9.74	22%
Mudgee	248	19%	$1,981	39%	$7.99	17%
Murray Darling - NSW	226	-38%	$1,252	-22%	$5.72	26%
Hilltops	199	104%	$1,851	90%	$9.29	-7%
Gundagai	114	-50%	$809	-15%	$7.07	70%
Canberra	28	-10%	$612	-23%	$22.05	-14%
Tumbarumba	27	-60%	$256	-80%	$10.98	-51%
Cowra	24	-39%	$197	-35%	$8.09	7%
Hunter	24	7%	$248	-9%	$10.53	-15%
New England	16	250%	$174	222%	$10.95	-8%
Perricoota	13	130%	$99	125%	$7.67	-2%
Lower Hunter Valley	10	361%	$100	334%	$10.64	-6%
Southern NSW	5	-51%	$22	-76%	$4.25	-51%
Big Rivers	4	-20%	$21	-33%	$5.53	-16%
Sthrn Highlands	3	-40%	$44	-47%	$15.47	-11%
Lower Hunter	2	85%	$20	120%	$12.29	19%
Upper Hunter Valley	1		$9		$6.65	na
Griffith	1		$9		$7.87	na
Western Plains	1	-71%	$4	-75%	$6.93	-12%

Market.insights@wineaustralia.com

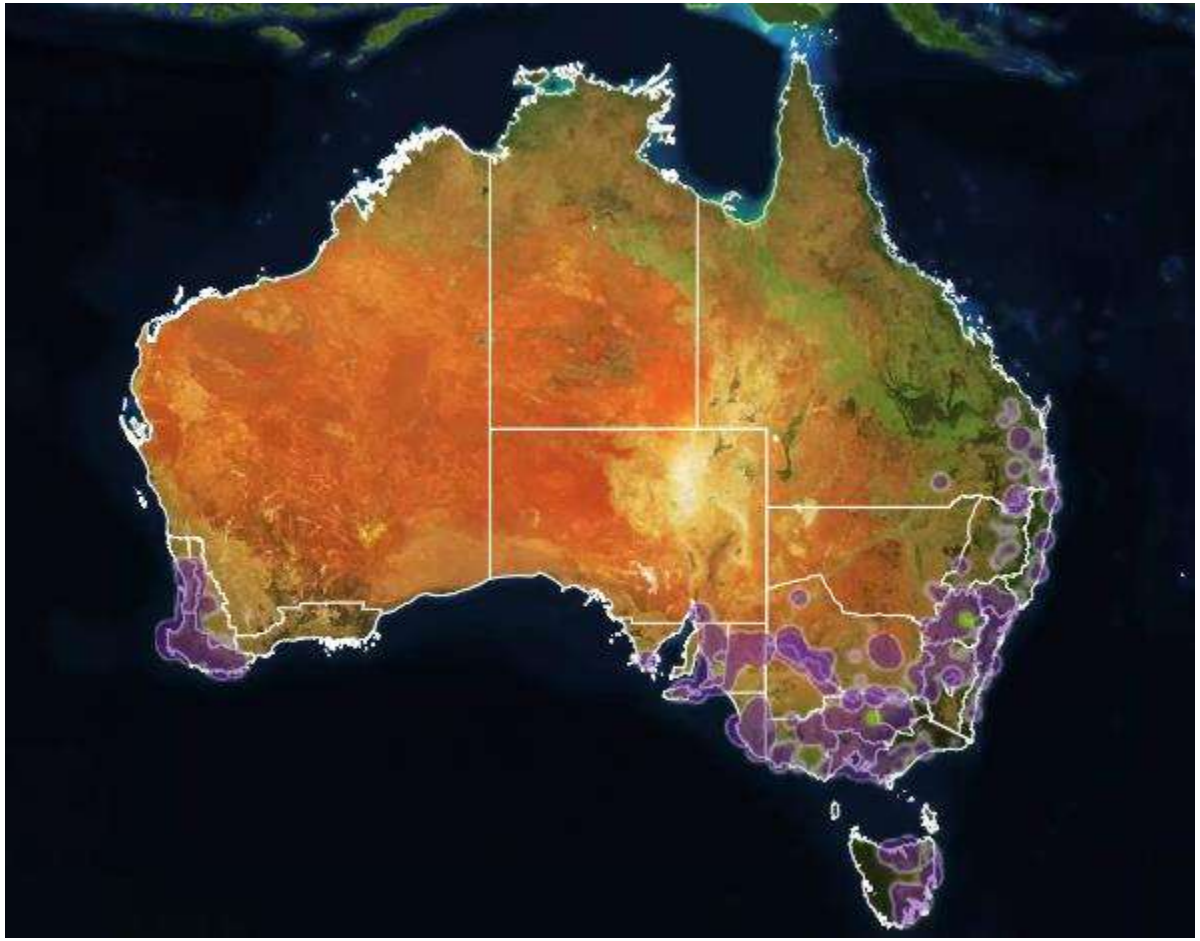
National Vineyard Scan 2018

Sandy Hathaway
Analyst

National Vineyard Scan

Three key outputs

- Report
- Maps
- App



National Vineyard Scan Report

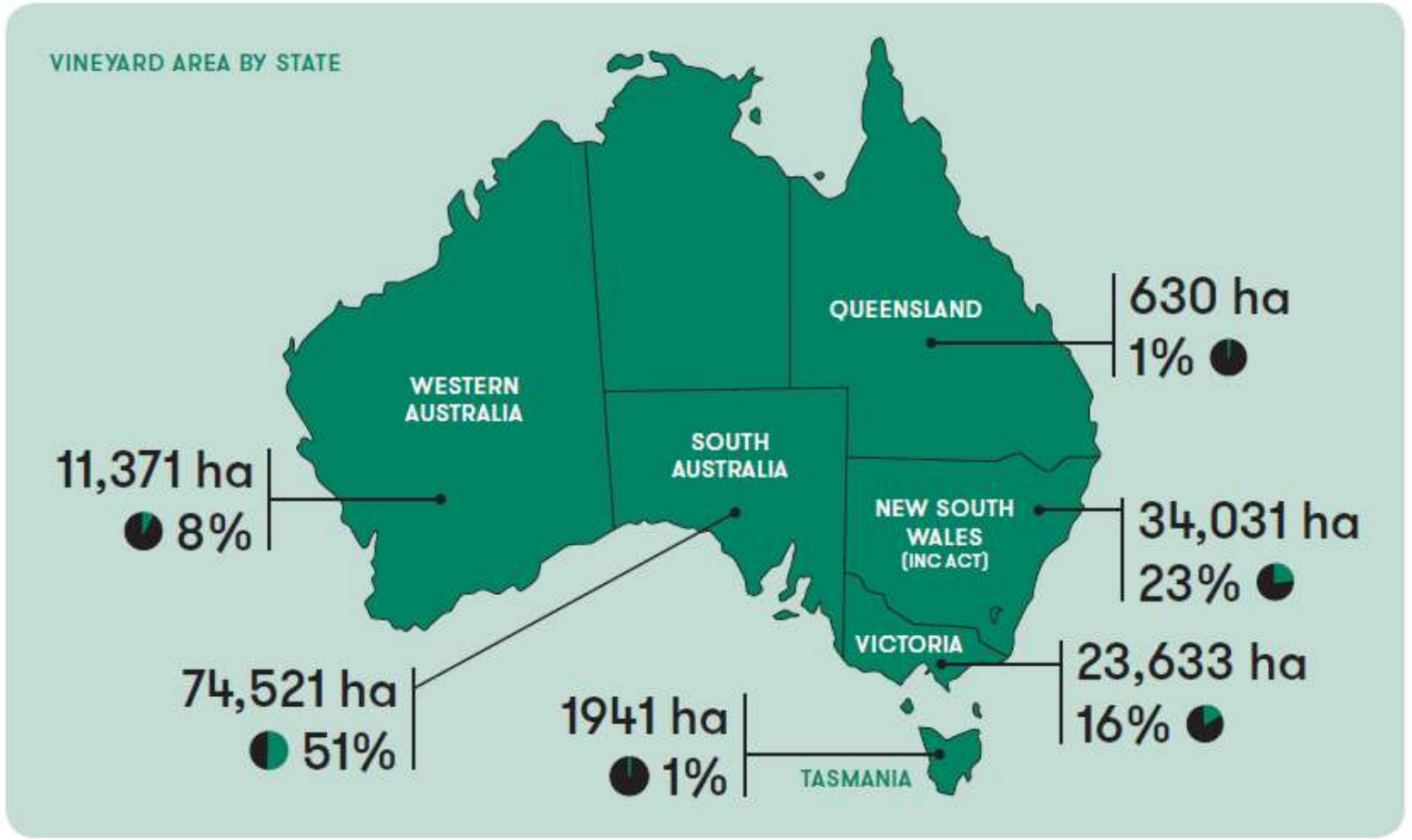
146,128
TOTAL AREA OF VINEYARDS IN HECTARES

463,718
TOTAL LENGTH OF VINE ROWS IN KM

3.17
AVERAGE DENSITY OF VINE ROWS IN KM/HA

5.1 million
TOTAL AREA IN HECTARES OF SATELLITE IMAGERY SCANNED BY GAIA

95%
VINEYARDS LOCATED IN A GI REGION

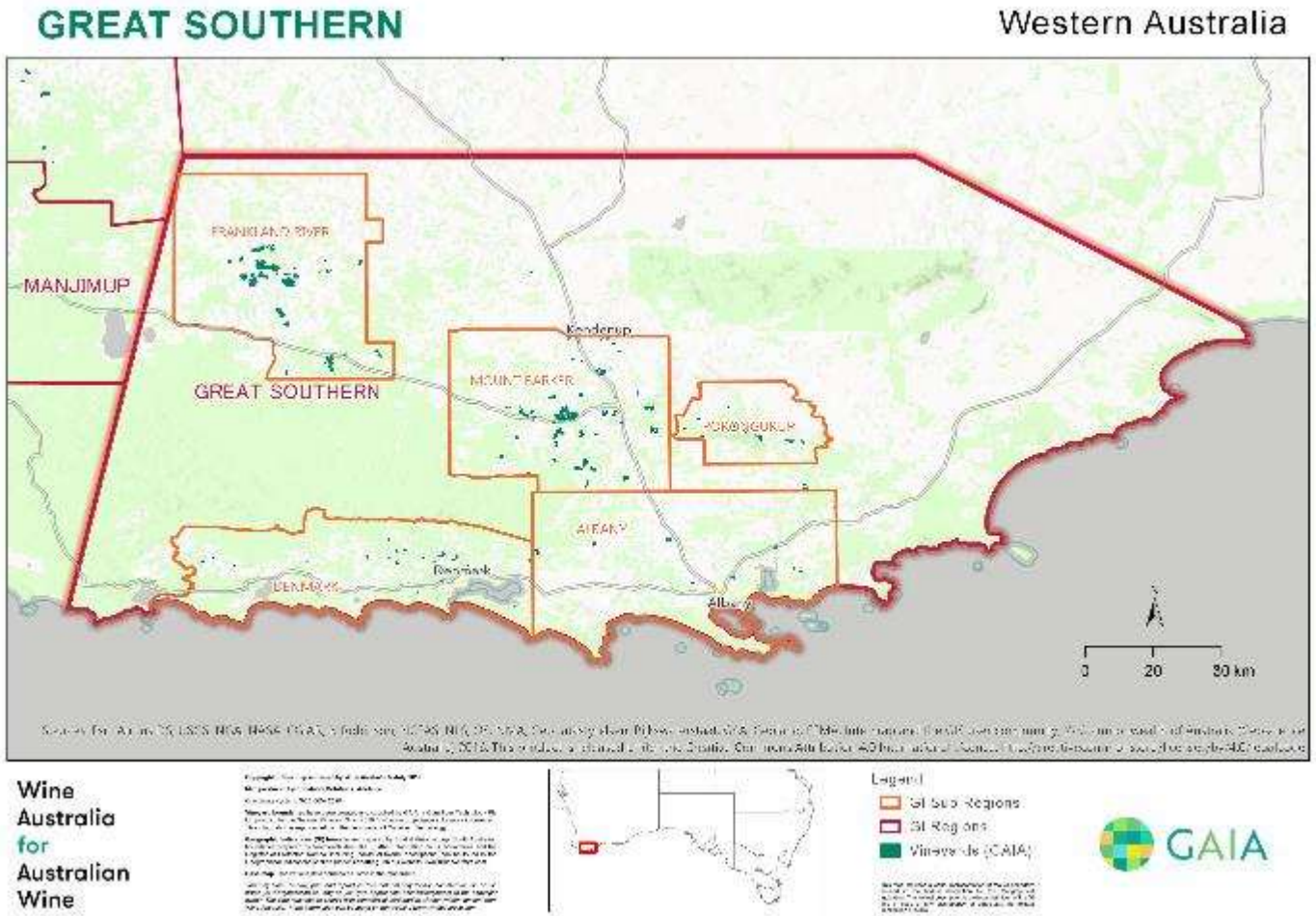


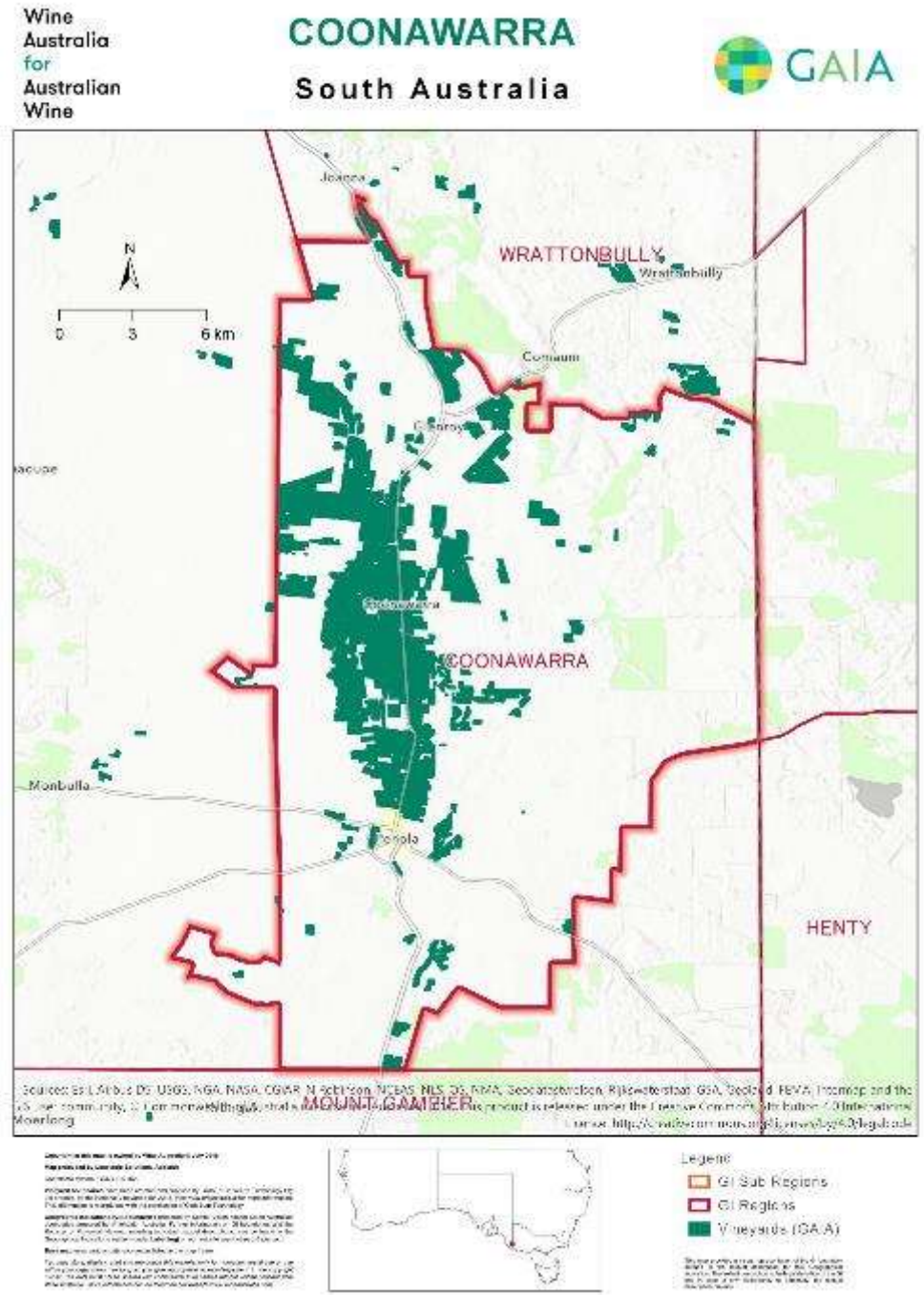
National Results

Table 1. *Summary statistics of wine vineyard block area of wine vine row length in each state and Australia.*

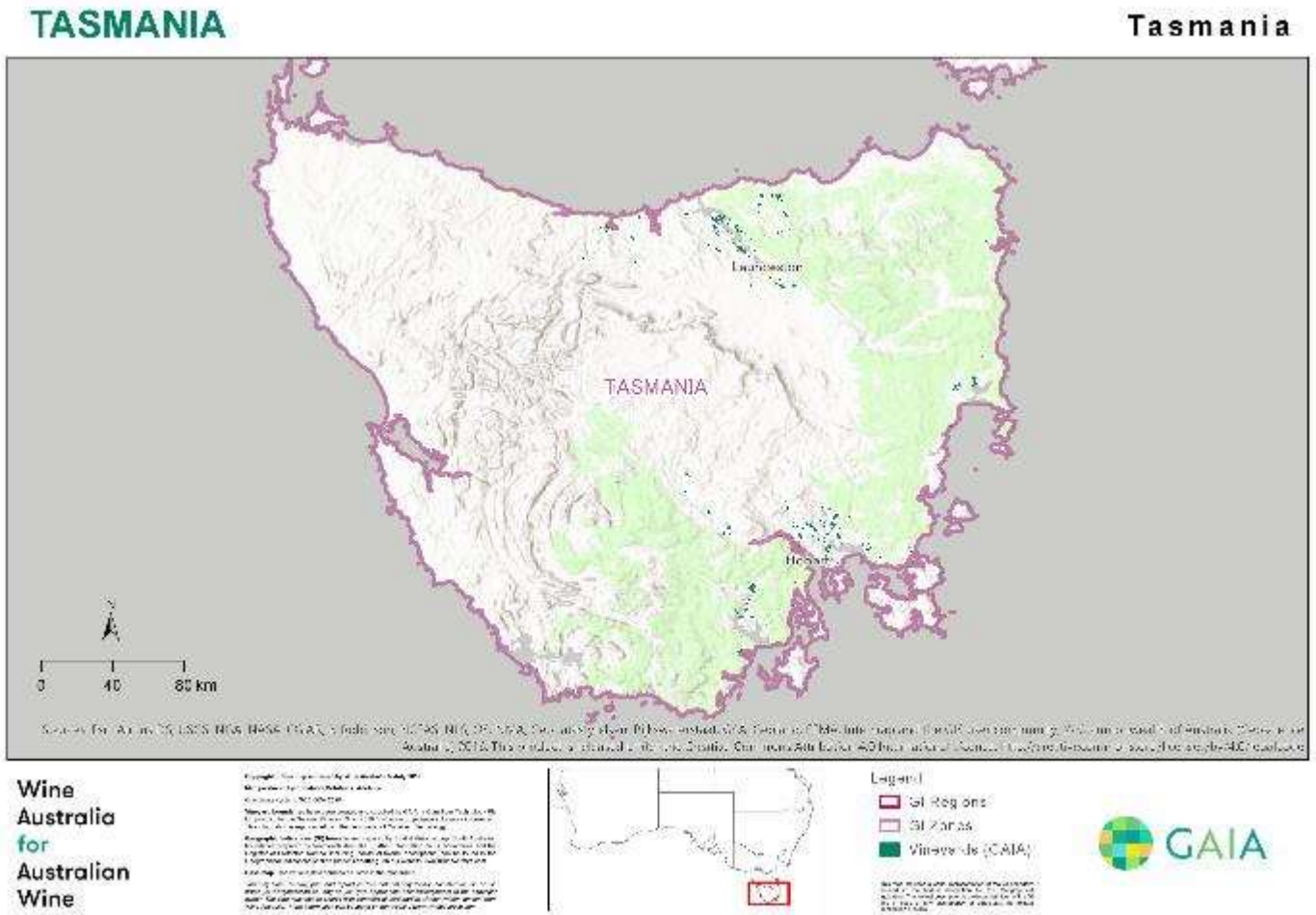
State	Total area "scanned" (ha)	Total area of vineyards (ha)	Total length of vine rows (km)
WA	294269	11371	34992
TAS	358346	1941	6981
SA	1322969	74521	240395
VIC	832154	23633	76524
NSW (incl ACT)	1844899	34031	102929
QLD	448143	630	1897
Total	**5,100,780**	**146,128 ± 8,669**	**463,718**

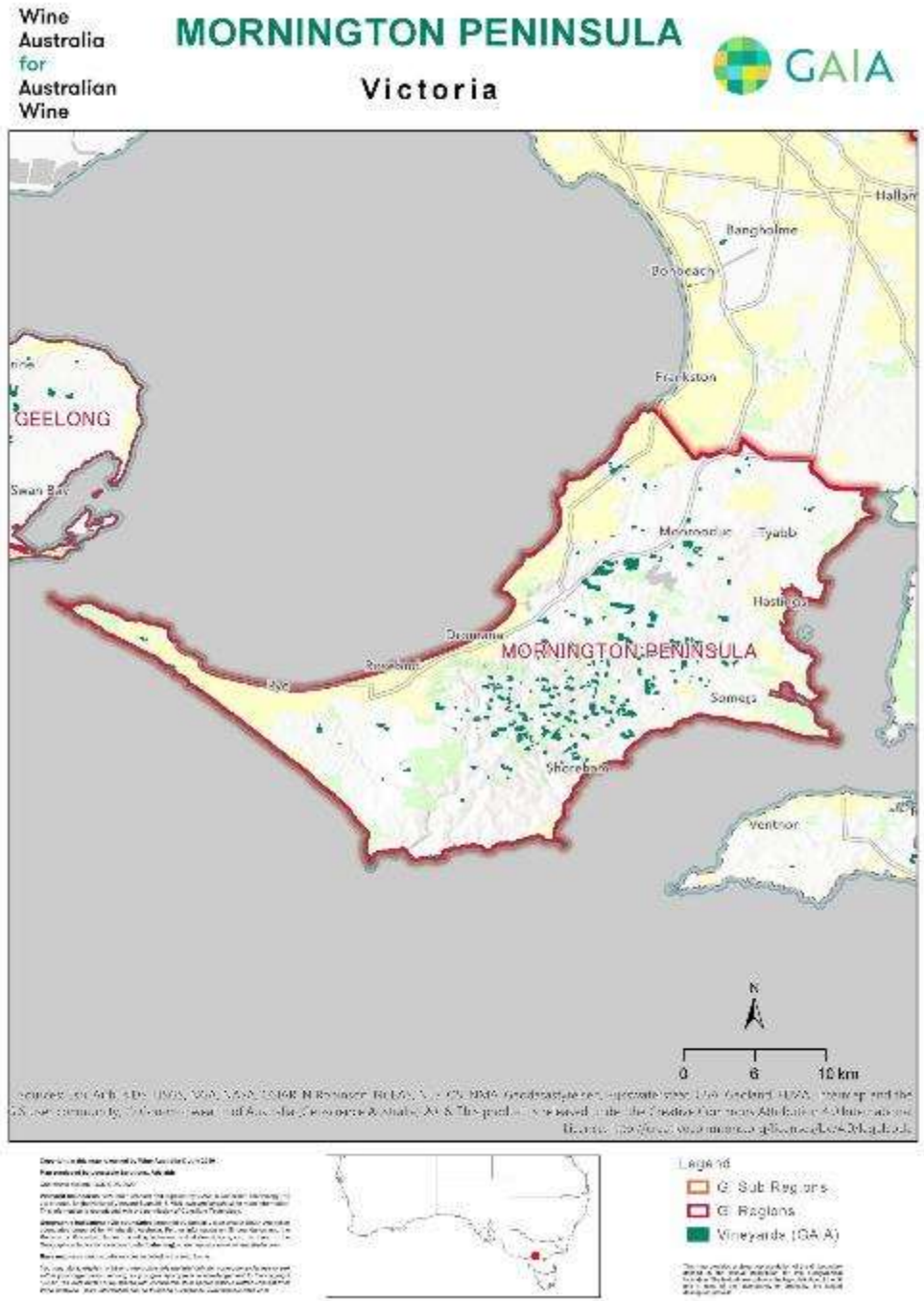
Regional vineyard maps





Regional vineyard maps





The GAIA app

Geospatial Artificial Intelligence for Agriculture

Global State and Regional Opportunities with Wine Australia

Stu Barclay – GM Marketing
Ali Lockwood – Manager, Stakeholder Engagement

11th November, 2019
Shanghai

MADE OUR WAY
CHINA AWARDS 2018
MADE OUR WAY

Award Categories ‘19

11th November, 2019, Shanghai

1	Best Australian Wine Promotion – On Premise
2	Best Australian Wine Promotion – Off Premise (new award)
3	Best Australian Wine Promotion – Online
4	Outstanding Feature Story on Australian Wine
5	Outstanding Lifestyle Story on Australian Wine Featuring Food and/or Tourism
6	Emerging Australian Wine Advocator (new award)
7	Australian Wine Communicator of the Year
8	Australian Wine List of the Year

Judges – Media Awards

Judging panel leader - Lu Yang MS, Corporate/Group Director of Wine for Shangri-La Hotels & Resorts, and Founder of Grapea Institute

Alexander Caillard,
Head of Pudao (Mainland China) and Langton's East Asia (Hong Kong)

Tom King,
Managing Director - North Asia, TWE China

Li Wei,
President and CEO, Swan Holding Group, Founder of HBF

Bel Sun,
Regional Sales Manager of China, Negociants International

Simon Wang,
Chief Operating Officer, ASC Fine Wines

Judges – Trade Awards

Judging panel leader - Stella Cai,
Senior Business Development Manager,
Australian Trade and Investment Commission
Shanghai office

Charles Guo,
Founder of Winemaster House

Silvia Hu,
Co-founder and Editor-in-chief
of Sommelier Press

Li Demei,
Associate Professor, Food Science and Technology College in Beijing University of Agriculture, renowned winemaker and key opinion leader

Maxime Lu,
Founder and Editor-in-chief of WineOnline.cn

Eva Xie,
Gourmet and Wine Critic, Writer, key opinion leader, Senior media professional

Sunny Zhang,
Founder of Pinor, Founder of Pinor Sommelier Academy, and Publisher of Pinor Magazine

Zhu Siwei,
Co-founder, Managing Editor and Senior Wine Educator of TasteSpirit

Benefits

- **Official Award sponsor who will present Trophy on stage**
- **Sponsors will be promoted in Wine Australia event communications and collateral.**
- **Logo placement – all marketing collateral**
- **Inclusion on WeChat Mini Program with wines and contact information, reaching millions of Chinese trade, consumers and media**
- **Two tickets to China gala dinner**
- **Opportunities for sponsor to present wines at Awards i.e. pre-dinner tasting bars and dinner.**
- **COST: $3,500 ex GST per Award**

Prowein China

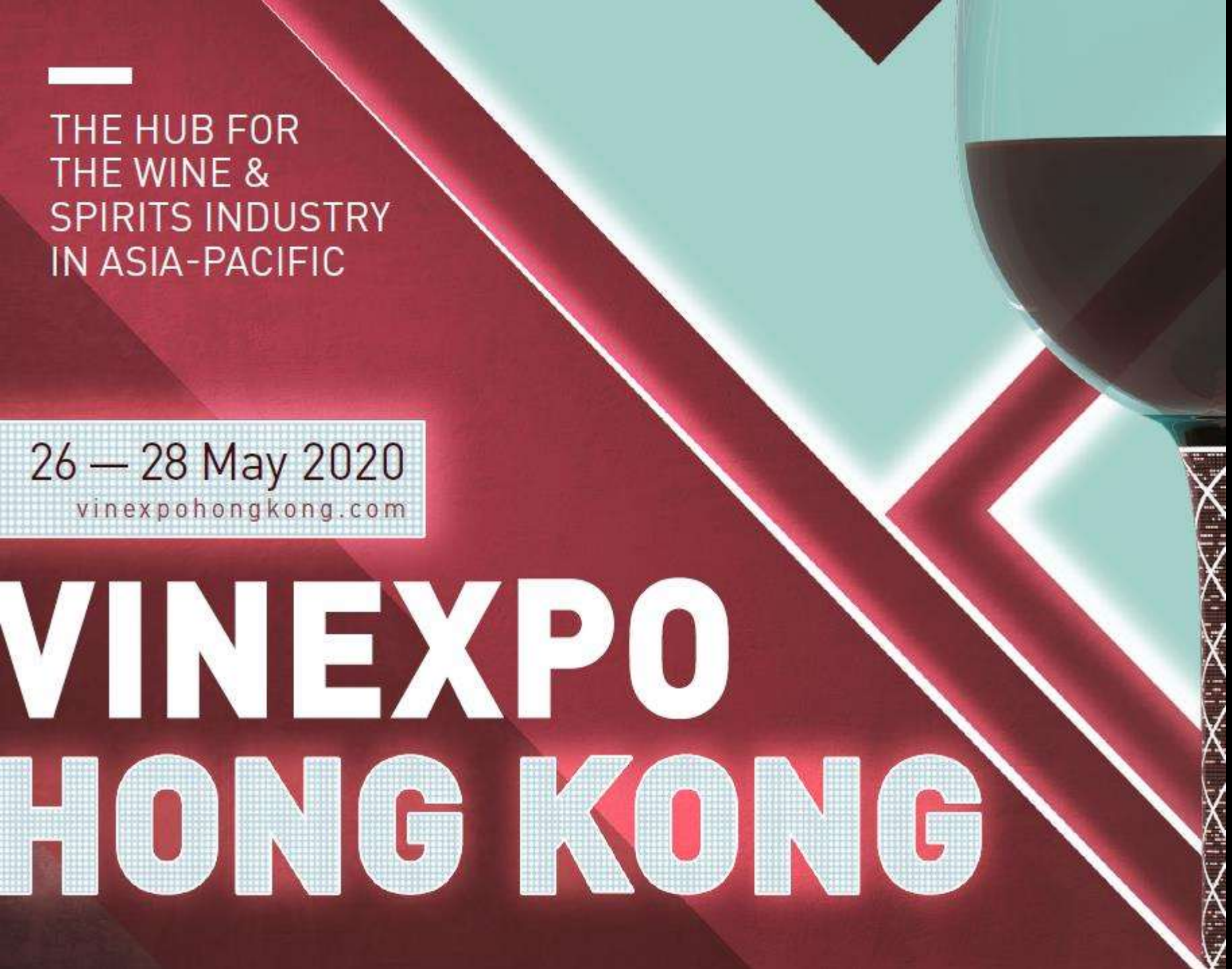
ProWine China - Regions/States

- **12-14 Nov, Shanghai**
- **Option 1 – Forum masterclass. 90 pax. $6K**
- **Option 2 – On-pavilion masterclass. 30 pax $1,200**
- **Option 3 – Regional table $7K**
- **EOI’s - CLOSED**

Vinexpo Hong Kong
and
China Roadshow
2020

China Events – May & June 2020

China Roadshow & Vinexpo



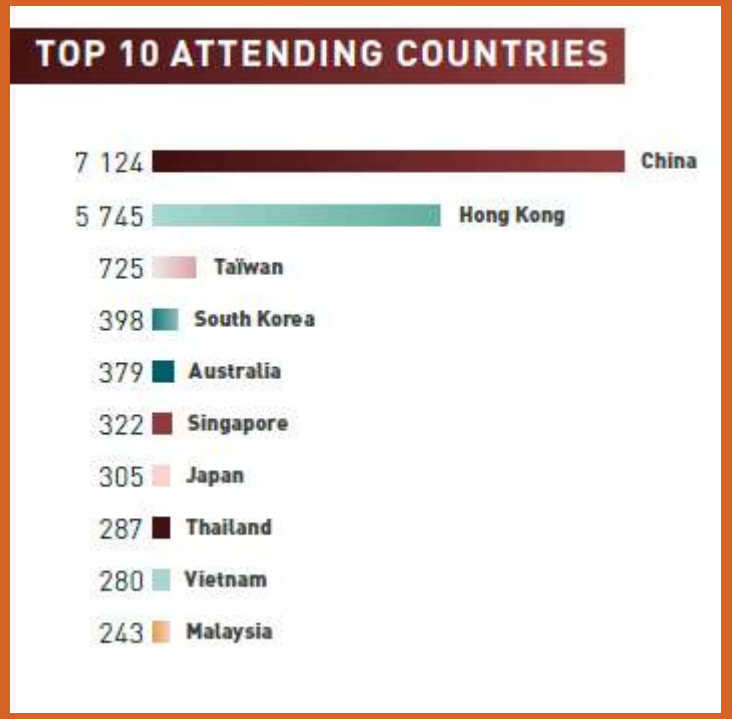
Vinexpo Hong Kong 2020

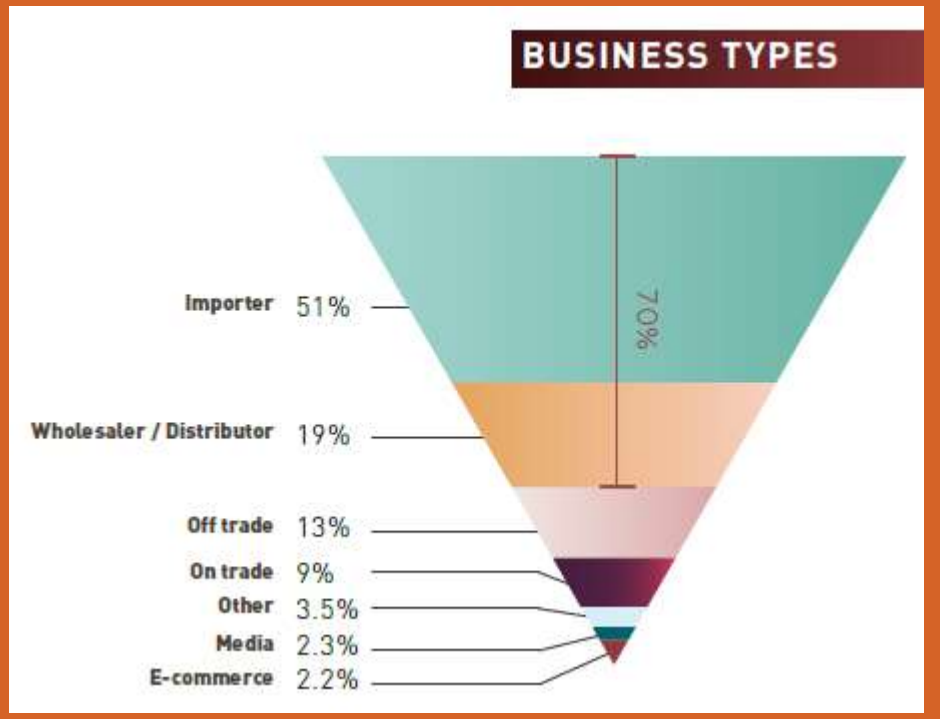
26–28 May, Wan Chai
Hong Kong Convention & Exhibition Centre

- **Biannual event**
- **Vinexpo Hong Kong is the most influential wine trade fair in Asia**
- **Momentum gained as Country of Honour at the 2018 edition of the event**
- **Prominent located pavilion in the main exhibition hall**
- **Wine Australia is inviting regions to join us, and the most influential buyers in Asia, at Vinexpo Hong Kong 2020**

Who's attending?

- 17,600 trade visitors in 2018
- The majority of buyers at the show in 2018 (70%) were importers, wholesalers or merchants, up from 58.8% in 2016
- 72% of all attendees in 2018 were involved in the purchasing of wines and spirits
- More than 65% were key decision makers
  - 34% president/owner/CEO/MD
  - 31% purchasing manager/buyer





Participation – Regions

In addition to individual wineries, Wine Australia also invites Regional Associations to leverage Vinexpo Hong Kong as an opportunity to convey the regional message and showcase the best it has to offer.

Wine Australia is pleased to offer a Regional package to amplify their presence at the event.

There must be a **minimum of 4 x full individual tables with wineries** from the region exhibiting at the event (with a maximum of 2 exhibitors per full table paying $5,600 ex GST each or one exhibitor paying $9,200 ex GST) for the Regional Association to be eligible for a regional presence at the Fair which includes a regional bar/table, branding and access to masterclasses.

Regional Bar or Shared Table	**AUD $9,200 ex GST Regional showcase to be managed by the Association. Maximum of 12 SKUs.**
Minimum of one Masterclass*	**To be held on the Wine Australia stand – no cost aside from wine stock, presenters/translators and coordination**

** Subject to availability based upon final regional EOIs.*

Inclusions:

- One larger bar/dedicated regional area with usage at your discretion
  (i.e. regional showcase, education, on-sell to individual's SKUs or small producers. Charged as a full table. Brands coordinated by the regional association.)
- Shared meeting area with a dedicated meeting table
- Regional branded signage at your bar/dedicated regional area
- Optional participation in the master class schedule at the Wine Australia education area over the course of the Fair (topic, presenter and wines organised by the regional association. Allocation subject to availability, to be determined at registration close.)
- Exhibition services such as refrigeration, glassware, spittoons, shared event staffing, refreshments etc.
- Regional associations can access the Pre-event business-to-business matching service (in conjunction with Vinexpo)
- Listing on Vinexpo Hong Kong website and booklet

China Roadshow 2020 – cities and dates

1 June	Nanjing
3 June	Qingdao
5 June	Xiamen
8 June	Guangzhou

Regional Opportunity – Silver Package

(Regional Table)

For regions that have four or more full exhibition tables*, regions have the option to apply for a Silver Package:

1) **One table for a regional showcase in all four cities**
2) **Up to ten brands and ten wines may be shown on a regional table**
3) **Regional signage for tables from your region and in all collateral and maps**

Inclusions:

- **Dedicated table to showcase > 10 wines from 10 brands**
- **Exhibition services such as storage, refrigeration, glassware, spittoons, shared event staffing, refreshments etc.**
- **Access to exclusive exhibitor-trade activities and social gatherings**
- **Invitations to trade + media networking events**
- **Inclusion on WeChat Mini Program**

Cost:

A$4,500 + GST per table

In addition, for regions with 10 or more full tables*, a regional table will be provided at no cost to the region.

Please note:

- **Translators, wine and freight logistics are an additional expense**

*** Winery tables only. Excludes importer tables.**

****Regional representatives to staff regional table.**

Regional Opportunity – Gold Package

(Master Class)

1) **For regions that have four or more full exhibition tables*, there is an opportunity to apply for the Gold Package to access limited master class opportunities.**

2) **The 2020 program currently has capacity for up to eight additional master classes.**

3) **Inclusions:**

- Dedicated education room holding up to 100 people

- One Chinese language wine educator to deliver class

- AV requirements, furniture and wine tasting equipment

- Inclusion on WeChat Mini Program, Wine Australia website and in all communications to delegates

- Printed collateral (incl. dedicated information booklet and tasting mat for each guests attending class)

- Dedicated Wine Aust pre-production and support

Cost:

A$4,500 + GST per class

Please note:

- **Max. 2 x master classes in total per region**
- **9 wines maximum per master class**
- **90 minute master class**
- **Simultaneous translation available for an additional A$4,000 per masterclass**
- **Translators, wine and freight logistics are an additional expense**

*** Winery tables only. Excludes importer tables**

****Regional representatives are not required to present. Masterclass will be delivered in Chinese**

Regional Opportunity – Platinum Package

(Regional Table + Master Class)

For regions that have four or more full exhibition tables*, regions have the option to apply for a Platinum package:

1) **One table for a regional showcase in all four cities****
2) **Up to ten brands and ten wines may be shown**
3) **Regional signage for tables from your region and in all collateral and maps**

AND a Regional Master Class:

- **Dedicated education room holding up to 100 people**
- **One Chinese language wine educator to deliver class**
- **AV requirements, furniture and wine tasting equipment**
- **Inclusion on WeChat Mini Program, Wine Australia website and in all communications to delegates**
- **Printed collateral (incl. dedicated information booklet and tasting mat for each guests attending class)**
- **Dedicated Wine Aus production team**

Cost:

DISCOUNTED A$8000 + GST per state/region

Please note:

- **Max. 2 x master classes in total per region**
- **9 wines maximum per master class**
- **90 minute master class**
- **Simultaneous translation services available for an additional A$4,000 per masterclass**
- **Translators, wine and freight logistics are an additional expense**

*** Winery tables only. Excludes importer tables**

****Regional representatives to staff regional table**

Regional representatives are not required to present masterclass

State and Regional Opportunities FY19/20

Market	Event	Timing	States and/or region	Details	Investment	Info. Avail.
China	Prowine Shanghai	12-14 Nov	States and regions	Forum masterclass (80 pax) OR On-pavilion masterclass (30 pax) Regional Table	$6,000 ex GST $1,200 ex GST $7,000 es GST	Distributed in May ’19
China	Wine Awards	11 Nov	States and regions	Awards sponsorship	$3,500 ex GST	August, 19
Hong Kong	Vinexpo	May ’20	States and regions	Regional table On pavilion masterclass	$9,200 ex GST	August, 19
China	Roadshow	June ’20	States and regions	Regional tables Forum masterclass Regional table and masterclass	$4,500 ex GST $4,500 ex GST $8,000 ex GST	August, 19
China	Chengdu Food & Drinks Fair	March, ‘20	States and regions	Masterclasses and regional bars – CF&DF and International Wine & Spirits Fair	TBC	TBC

Australian Trade Tastings

Australia Trade Tastings – forum masterclass

- **21st January 2020 - London**
- **27th January 2020 – Edinburgh**
- **Key category tasting for the trade/media**
- **Speakers. Suggest locally based**
- **$2,500 ex GST and ex speaker fee and wines for both cities**
- **EOI's – August**

ProWein 2020

- 60,000 visitors from across the world, including major buyers from Europe, USA, Canada and Asia.

- Australia's presence – 13 wineries in 2010 to 80 in 2020

- **Forum masterclass opp:**
  - 50 pax/8 SKUs/1 hour
  - Cost - $3,750
- **On stand mini tasting opp**
  - 24 pax/6 SKUs/45 mins
  - $1,200
- **GST, freight, speaker fee and wines additional**

Belgium and Netherlands

Belgium – April 2020

- **Regional masterclass**
- **12 SKUs/2 hours**
- **A$2,000 ex GST + wines/speaker/freight**

Netherlands – May 2020

- **Regional seminar at trade tasting**
- **6 SKUs/45 mins**
- **A$800 ex GST + wines/speaker/freight**

London – bespoke masterclass

- **Themed masterclass (45 pax) and/or tasting opportunity (250 pax)**
- **Held in Australia House**
- **Cost effective and targeted**
- **Wine Australia manage invitations, PR, social media, event manage, glassware, AV etc.**

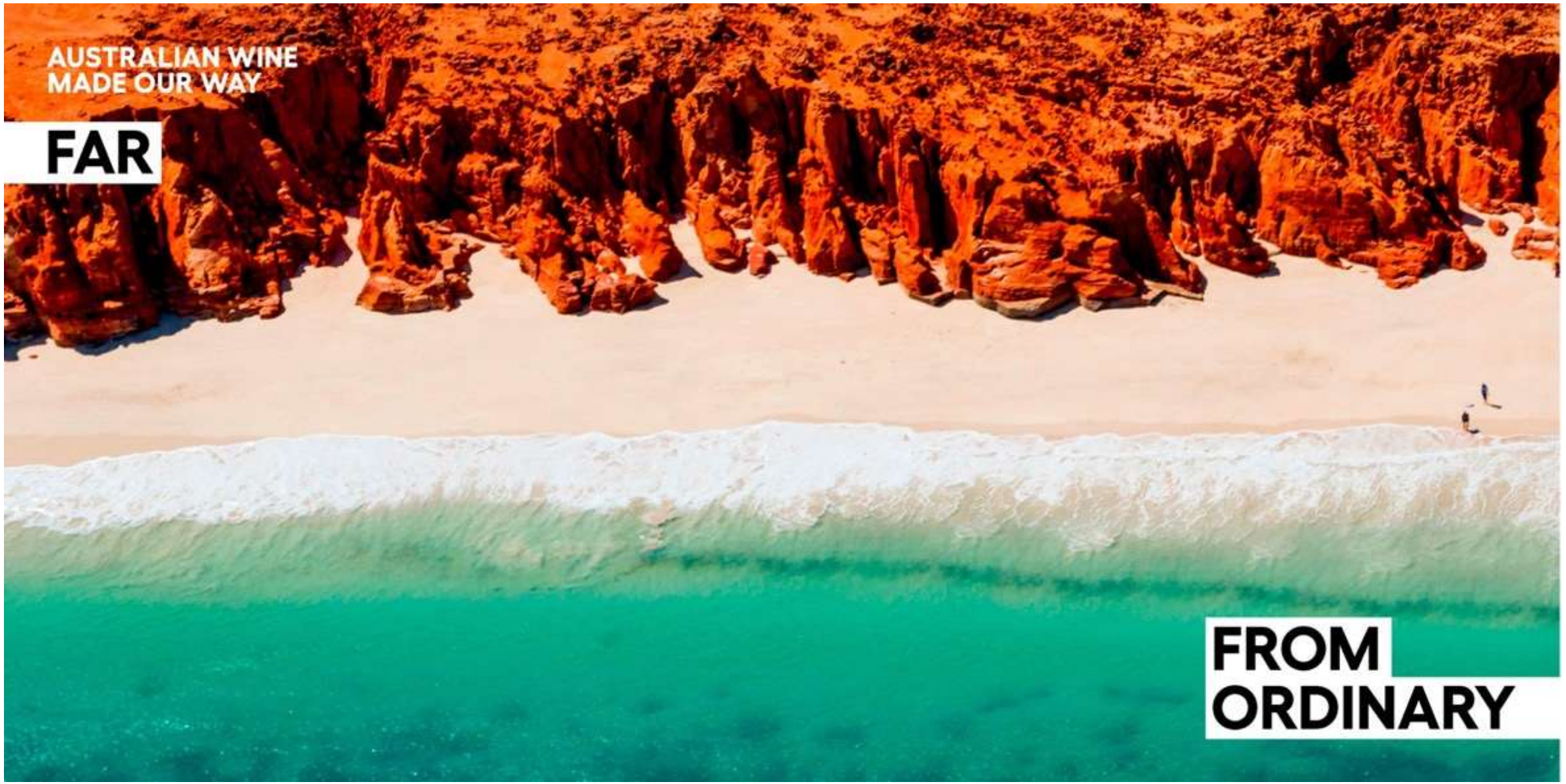
Cost: $10,000 - $20,000 + host and wines

State and Regional Opportunities FY19/20

Market	Event	Timing	States and/or region	Details	Investment	Info. Avail.
London & Edinburgh	Australia Trade Tastings	Jan ‘20	Regions	Regional master class at both events. Last time Sarah Ahmed presented Alternative Varieties from McLaren Vale	A$2,500 plus wines plus speaker fee plus freight if needed.	EOI by end August
Germany	ProWein	March ‘20	Regions	Regional tasting in the Forum for 50 people. Must be draw-card speaker. Last time Madeleine Stenwreth MW presented Margaret River Chardonnay. 8 SKUs (1 hour)	A$3,750 plus wines plus freight plus speaker fee.	EOI by end Sept
Germany	ProWein	March ‘20	Regions	On-stand mini tastings for approx. 24 people plus free pour tasting at wine bar area of stand. 6 SKUs (45 mins)	A$1,200 plus wines plus freight plus speaker (Wine Aus speaker available)	EOI by end Sept

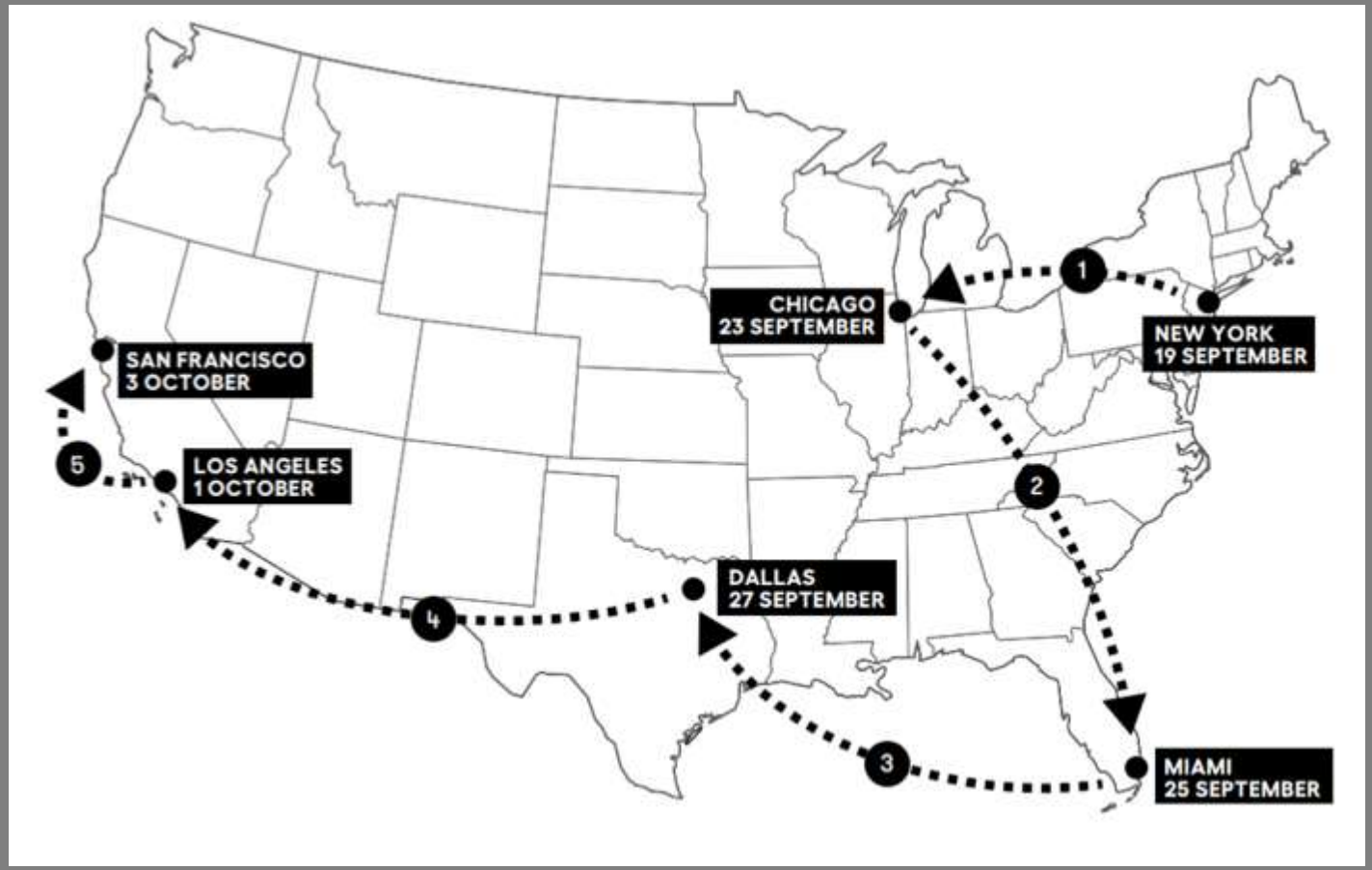
State and Regional Opportunities FY19/20

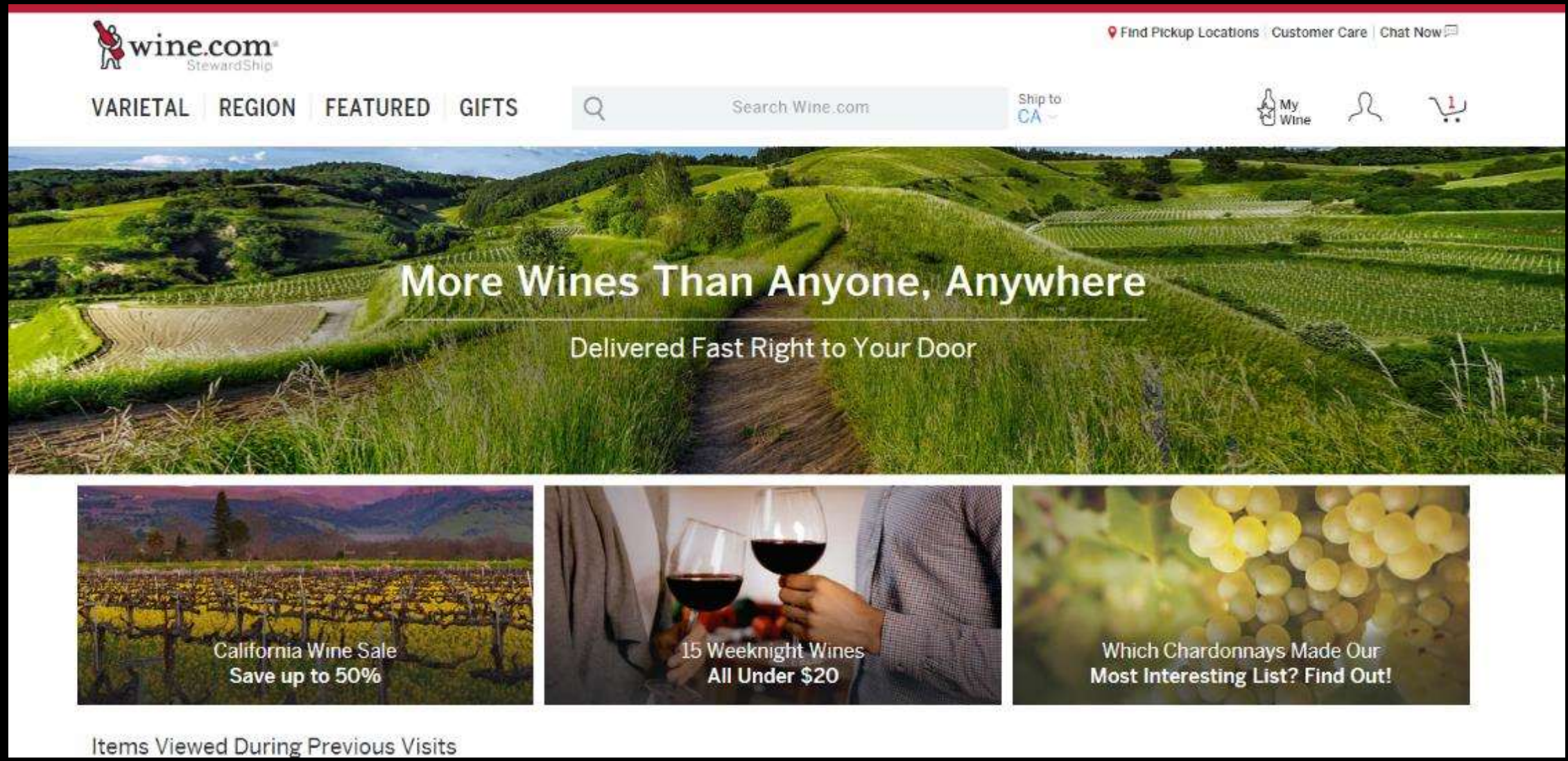
Market	Event	Timing	States and/or region	Details	Investment	Info. Avail.
Belgium	Master class and free pour tasting	April ‘20	Regions	Regional master class. Last time Sarah Ahmed presented Alternative varieties. 12 SKUs (2 hours)	A$2,000 plus wines plus speaker fee plus freight if needed.	Info October
Netherlands	Trade tasting and seminar	May ‘20	Regions	Regional seminars at trade tasting. This is a new format for this market. Two sessions available. 6 SKUs (45 mins)	A$800 plus wines plus freight plus speaker fee.	Info October
London or other major cities	Master Class	Ongoing	Regions	Bespoke master class and tasting in Australia House. From one off master class for 40 people to full trade tasting.	Cost dependent on format. Speaker and wines, plus attending winemakers. E.g. MPVA on tour, Sept 2018	Ongoing


AUSTRALIAN WINE
MADE OUR WAY
FAR
FROM
ORDINARY

Far From Ordinary Roadshow

- **Trade tasting and seminar in key cities – targeting 2,500 attendees**
- **Invitations out July 30th**
- **Far From Ordinary theming and experiential accents**
- **Venues and styling that stand out from the “sea of sameness”**
- **Mini masterclasses – Made our Way Theatre**
- **EOI’s - CLOSED**




wine.com
StewardShip
Find Pickup Locations | Customer Care | Chat Now
VARIETAL | REGION | FEATURED | GIFTS
Search Wine.com
Ship to CA
My Wine
More Wines Than Anyone, Anywhere
Delivered Fast Right to Your Door
California Wine Sale
Save up to 50%
15 Weeknight Wines
All Under $20
Which Chardonnays Made Our
Most Interesting List? Find Out!
Items Viewed During Previous Visits

US Market Entry Program

- **Results based program - customised business plan**
- **Assistance to bring wines into market**
- **Distribute wines to US based importers/distributors**
- **Curate customer meetings and partnerships**
- **Educate wineries – market knowledge**
- **Provide tools, guidance**
- **Strategic guidance dealing with importers, distributors**
- **Financial year program**
- **A$10K per year per company**

What we need to know:

1) Budget

1) KPIs – what do you want to achieve?

1) Timeframe – FY/calendar year

1) Market priorities

Wine Australia AOP available at:
https://www.wineaustralia.com/about-us/strategy-and-planning

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Wine Australia

Visits Program

Tonia Davis
Visits Marketing Manager

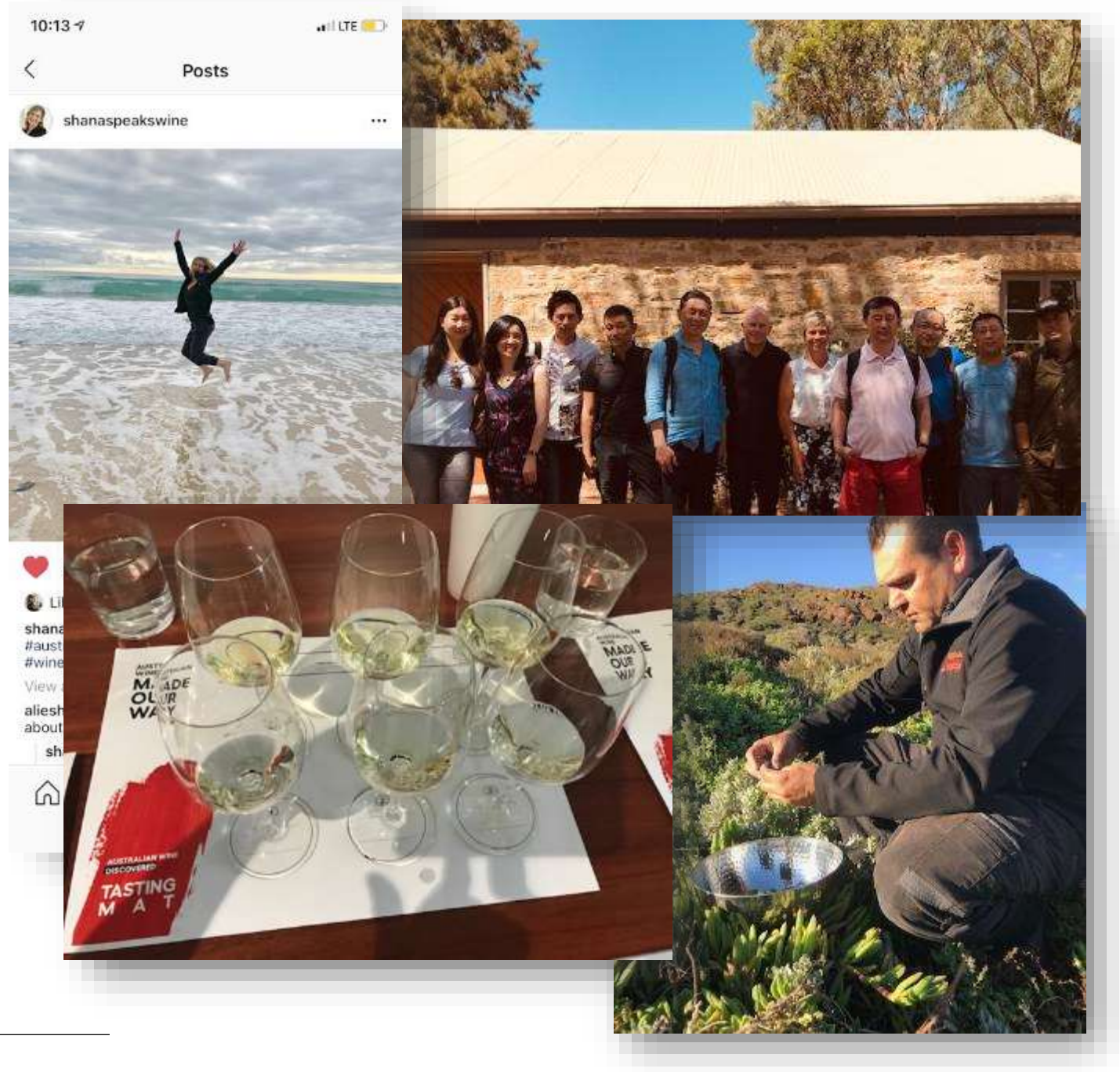
Outcomes

Why host visits

Understanding the visits program

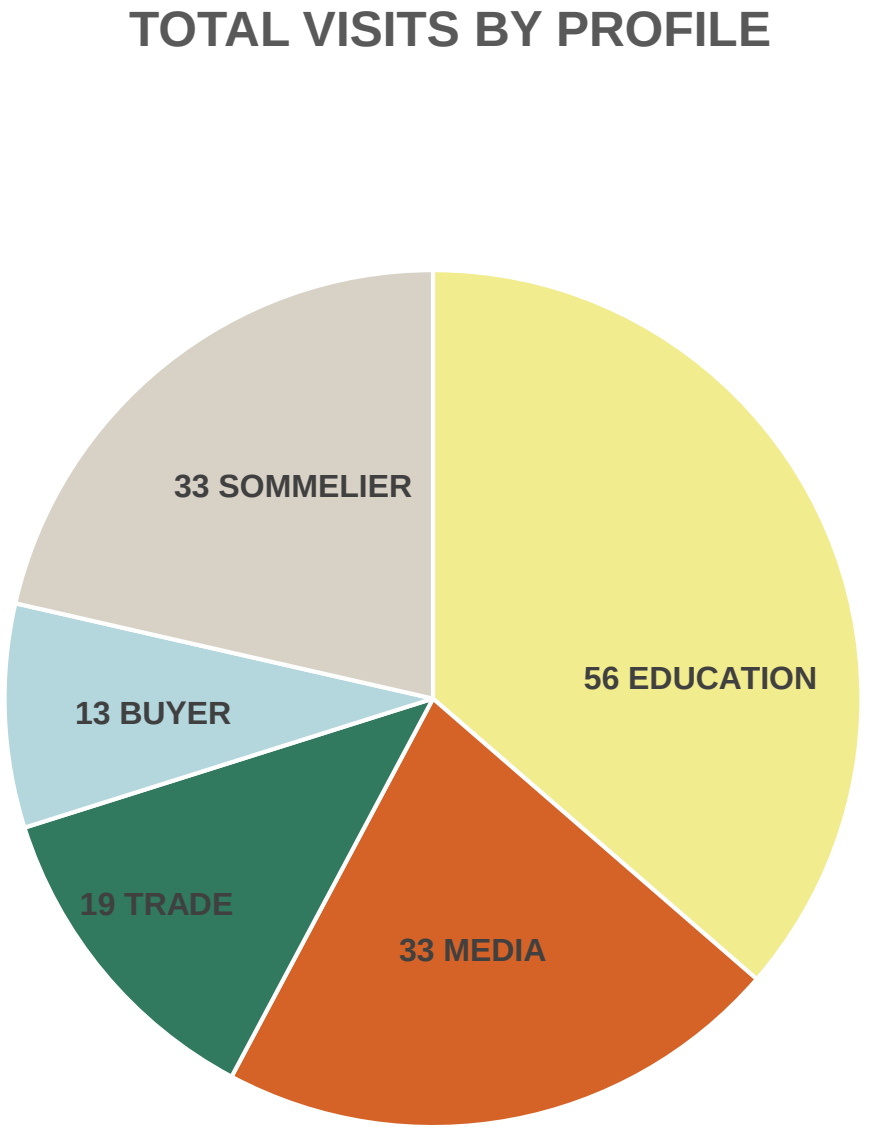
What’s visit success

How we work together



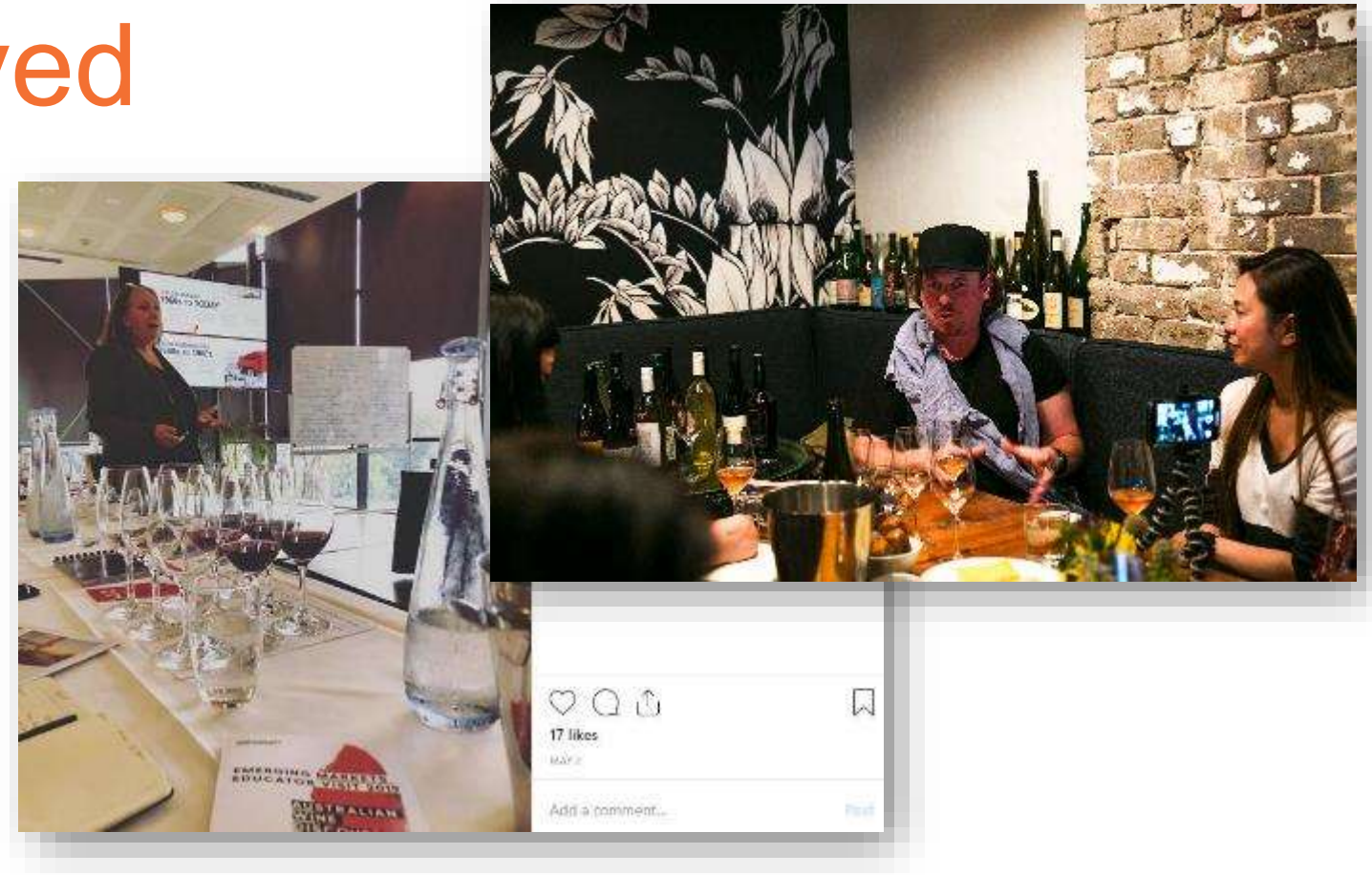
What we've achieved in FY 18/19

- Hosted **154 visitors** on **25 visits and tastings held in Australia.**
- **20+** countries represented
- **124 days** in **19 wine regions**
- **54 Articles** published to date
- **79%** of buyers intended purchasing more Australian wine for their portfolios.



What we've achieved in FY 18/19

- Perception Change
- What we introduced
- Australian wine overview
- Authentic voices in visits
- Australian Wine Discovered program (AWD) **https://www.wineaustralia.com/education**



"This was an unprecedented wine trip, honestly the best I've been on in my career, no exaggeration. The number of visits, the quality and diversity of them, the attention to detail, the depth and breadth of wines is overwhelming."

Madeleine Triffon MS, Plum Market stores in Metro Detroit and Chicago.
US Sommeliers Visit May 2019

How Visits Happen

Shaping visits

Visitor feedback & trends

Industry feedback

The year ahead

Working together

How we shape visits

Visitor feedback – what works

Visitor satisfaction 100%

- Charismatic hosts
- Strong regional overviews
- Themed tastings
- Group tastings over individual winery visits
- Structured tasting prior to a casual meal
- Tourism experiences & free time

Trends resonating with visitors

- Sustainable winemaking practices
- Minimal intervention wines
- Organics and biodynamics
- Climate change
- Small, bespoke producers

"I'd expected an approach to viticulture and winemaking that was wholly commercial and chemically dependent… What I hadn't expected was how much more seriously Australia takes organic certification than the EU, and how many Australian producers are quietly, without fanfare, making changes to the way they operate because they're seeing the effects of climate change in their vineyards right now." Tamlyn Currin ***(Jancis Robinson.com)***

Industry feedback

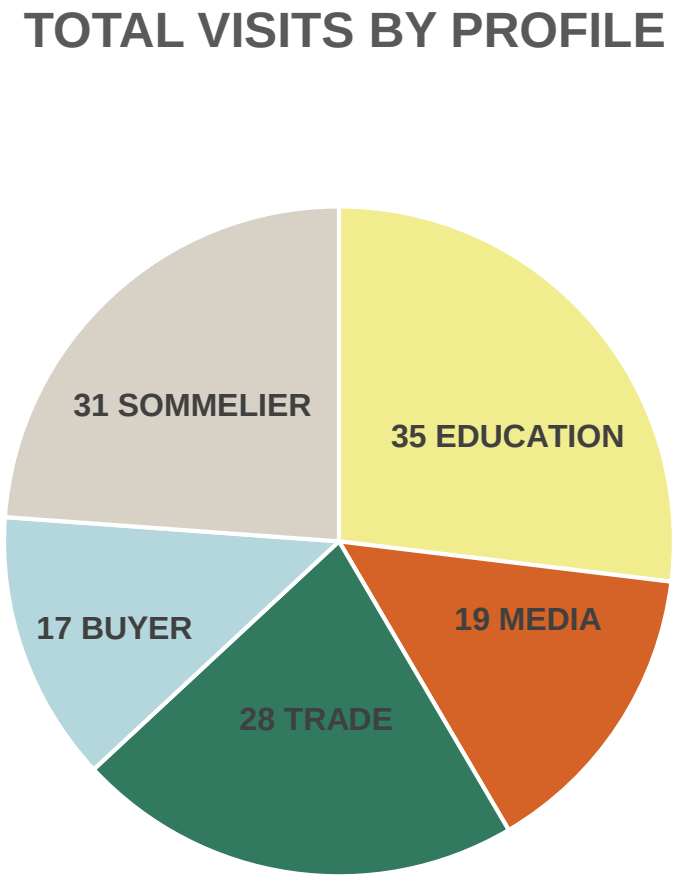
Industry satisfaction – 95%

- What's in it for me?
- Earlier notification of visits and guests
- Weekday visits preferred
- Avoiding visits around vintage
- Association members vs non members

Encourage filling out feedback forms

The year ahead FY19/20

- **130 visitors** proposed
  + individual visits US, China, UK
- **17 visits**
- Even spread of visits across markets and audiences
- Continued Influencer focus
- Visits updates on Wine Australia website **www.wineaustralia.com/whats-happening/visitor-programs**

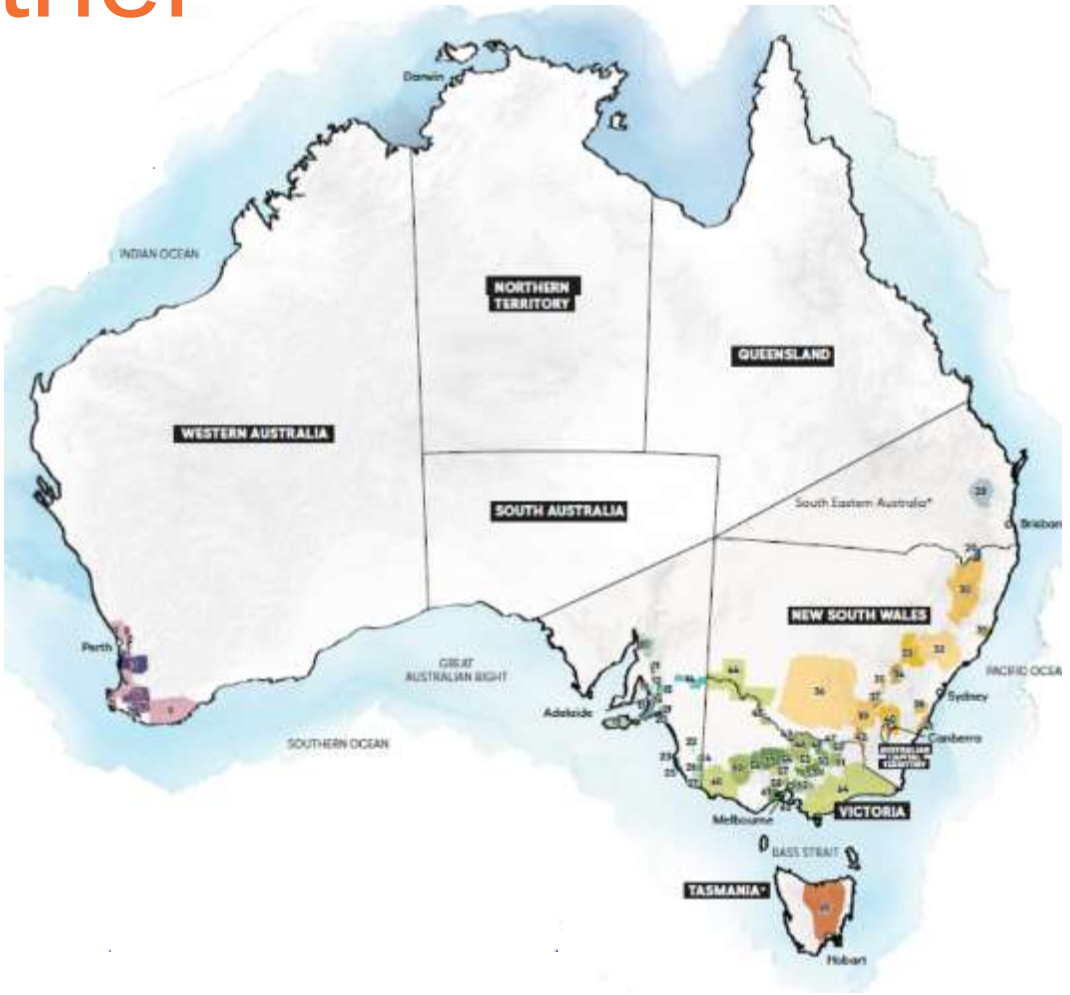


The year ahead FY19/20

- 2 new visits: Irish Sommeliers and German Trade Visits.
- Visit replacement: China Vintage now China Sommeliers Visit
- FY Visit plans
- International visit terminology

How we can work together

- Target markets: The right region for the right visit
- What makes your region unique?
- Strong regional overviews
- Charismatic hosts
- Region news and milestones
- Create memorable moments



Inspired Visits Tasting tomorrow….

Thank you

Tonia Davis

Visits Marketing Manager

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