

Thursday, 8 November 2018

Supermarkets continue to take alcohol market share from hotel bottle-shops

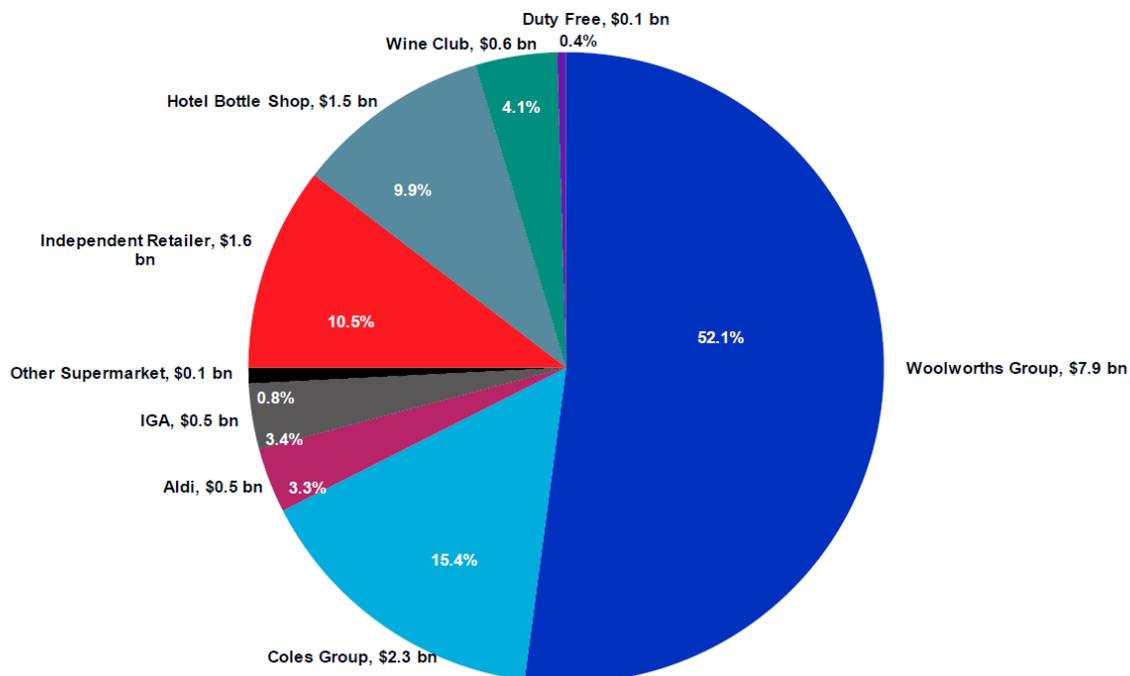
The trend towards supermarket domination of the alcohol retail sector continued apace over the year to September, with Woolworths Group-owned outlets picking up 250,000 customers and hotel bottle-shops losing virtually the same amount (240,000) according to the latest survey data from Roy Morgan.

Woolworths Group and Coles Group continue to dominate the market-share league table, with 5.83 million and 2.41 million customers respectively. That gives Woolworths Group market penetration of 61.8% and market share in dollar terms of 52.1%. By comparison, Coles Group has market penetration of 25.5% and market share of 15.4%.

Woolworths Group brands Dan Murphy's and BWS both increased their customer bases over the 12 months to September, by 4.0% and 9.3% respectively. Coles Group's brands saw more mixed results – Liquorland customer numbers declined by 13.1% over the year, with 1st Choice Liquor virtually unchanged and Vintage Cellars growing its customer base by 18.5%.

These are the latest figures from the [Roy Morgan Alcohol Retail Currency Report](#), based on data collected via in-depth, personal interviews conducted face-to-face with over 50,000 Australians per annum in their own homes, including more than 7,000 who had purchased packaged alcohol within four weeks of being interviewed.

Total packaged alcohol market \$15.1 bn



Source: Roy Morgan Single Source, 12 months ending September 2018, n=3,549.
 Base: Respondents aged 18+, purchased packaged alcohol last 7 days.

FOR IMMEDIATE RELEASE

Michele Levine, CEO, Roy Morgan, commented:

“The success of the Woolworths Group’s brands continues to set the pace, with Dan Murphy’s growing its customer base by 4.0% in the year to September and BWS by 9.3% over the same period.

“This is certainly harming the trade of hotel bottle-shops, which have continued to lose customers. That has to hurt in a retail environment in which total spend on packaged alcohol has been falling throughout 2018.

“Our research shows a number of drivers of buying behaviour in this market, including proximity to other shops, low prices, an easily browseable range and good special offers.

“Roy Morgan’s Single Source survey data can help retailers across the sector understand who their customers are and where they live, work and shop. And our psychographic segmentation tool Helix Personas can help explain customers’ buying behaviour and how to communicate with them.

“The [Roy Morgan Alcohol Retail Currency Report](#) looks at long- and short-term trends for the market size and share (in dollars), customer numbers and cross visitation and overall purchase channel types as well as looking in-depth at major supermarket retailers.”

The full [Roy Morgan Alcohol Retail Currency Report](#) is now available from the Roy Morgan Online Store.

Please click on this link to the [Roy Morgan Online Store](#).

About Roy Morgan

Roy Morgan is the largest independent Australian research company, with offices in each state of Australia, as well as in the United States and the United Kingdom. A full service research organisation specialising in omnibus and syndicated data, Roy Morgan has over 70 years’ experience in collecting objective, independent information on consumers.

Margin of Error

The margin of error to be allowed for in any estimate depends mainly on the number of interviews on which it is based. Margin of error gives indications of the likely range within which estimates would be 95% likely to fall, expressed as the number of percentage points above or below the actual estimate. Allowance for design effects (such as stratification and weighting) should be made as appropriate.

Sample Size	Percentage Estimate			
	40%-60%	25% or 75%	10% or 90%	5% or 95%
5,000	±1.4	±1.2	±0.8	±0.6
10,000	±1.0	±0.9	±0.6	±0.4
20,000	±0.7	±0.6	±0.4	±0.3
50,000	±0.4	±0.4	±0.3	±0.2