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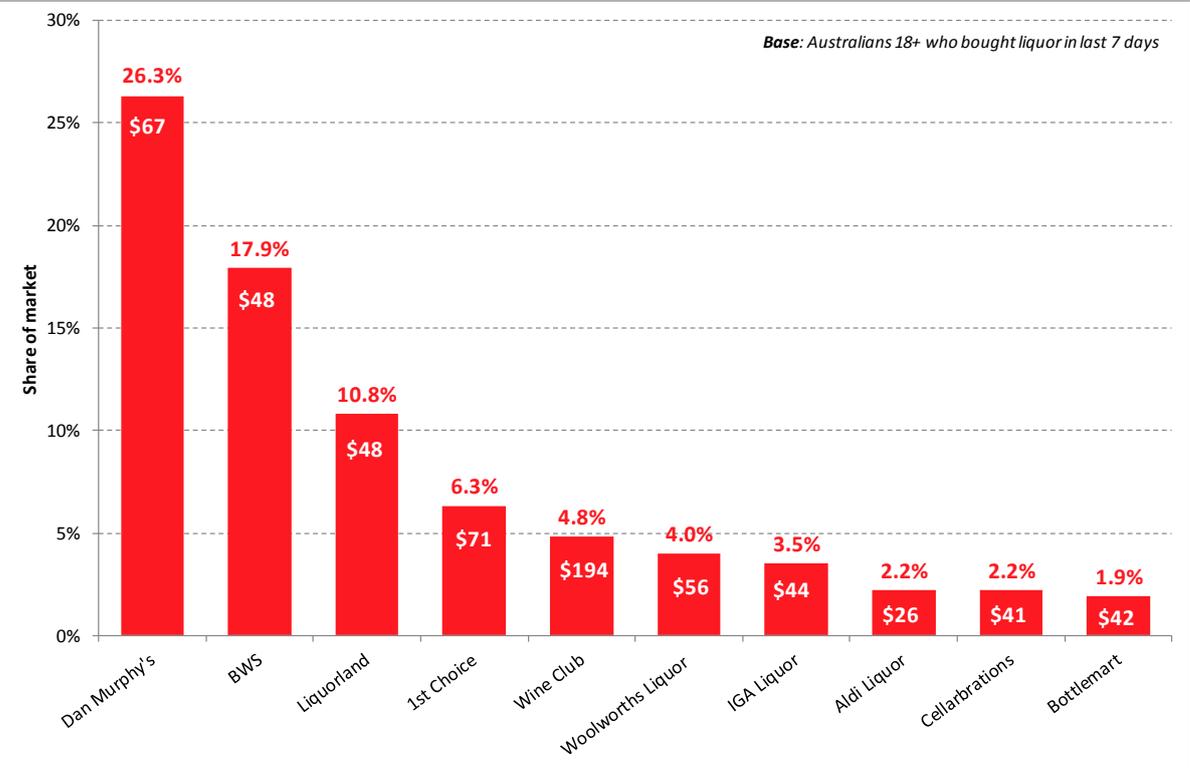
Dan Murphy's (and Woolworths) blitzing the Aussie liquor market

According to the latest findings from Roy Morgan Research, some 4.8 million Australian adults buy alcohol in an average seven days, spending almost \$296 million between them (an average of \$61 per person per week). Enjoying the largest slice of this rather substantial pie is liquor megastore Dan Murphy's--leader not only in terms of market share, as it happens, but also in total customer numbers.

In any given week, 1.2 million Aussies 18+ (or 23.9% of total alcohol-buyers) shop at Dan Murphy's, spending an average of \$67 each. The result? An impressive 26.3% share of total dollars spent on alcohol during an average seven-day period--well ahead of BWS (Beer Wine Spirits), which has 17.9% of the total weekly liquor spend.

With 1.1 million people shopping there in an average seven days, BWS is only just behind Dan Murphy's in terms of customer volume. However, because BWS customers spend considerably less on average (\$48) than Dan Murphy's shoppers, the difference in market share between the two retailers is more pronounced.

Top 10 liquor retailers in terms of market share



Source: Roy Morgan Single Source (Australia), October 2014 – September 2015 (n=3,730). Dollar figures = average customer spend for each store.

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Liquorland (10.8% of total market dollars), 1st Choice (6.3%) and wine clubs such as Cellarmasters and the Wine Society (4.8%) complete the top five liquor retailers with respect to market-share size.

But where a retailer sits in term of market share does not always correspond with the volume of customers shopping with them in any given seven days.

Wine clubs are the most striking example of this. While they account for the fifth-greatest portion of total dollars spent—thanks to their customers’ hefty \$194 weekly spend— they don’t even crack the top 10 for customer numbers. Used by 74,000 Australian adults in an average seven days, these online retailers tend to specialise in bulk sales (eg cases of wine) rather than spontaneous one-off purchases.

The opposite pattern is true of ALDI Liquor, which attracts the fifth-highest number of shoppers in any given seven days (251,000) but only 2.2% of total dollars spent due to their customers’ low average spend (\$26). Given the low prices of ALDI Liquor’s products, this is not especially surprising.

Andrew Price, General Manager – Consumer Products, Roy Morgan Research, says:

“These latest alcohol findings will come as very good news to Woolworths Limited, which owns both Dan Murphy’s and BWS, the retailers with the highest share of Australia’s liquor market—just over 44% between the two of them.

“With its enormous, well-stocked stores, low-price policy and strong online presence, Dan Murphy’s also happens to be the current Liquor Store of the Month in the [Roy Morgan Customer Satisfaction Awards](#). Clearly the chain is ticking all the right boxes among Australia’s alcohol buyers, who not only flock there in droves but rack up one of the higher average weekly spends.

“BWS serves a different purpose, being geared more towards convenience with its stores located adjacent to Woolworths supermarkets. It is interesting to note that Woolworths also has a finger in the wine club pie with Cellarmasters, one of the country’s top online wine stores.

“With its three very different liquor retail offerings, Woolworths seems well positioned to thrive in this competitive market [even as the proportion of Australians drinking and buying alcohol continues to decline...](#)”

For comments or more information about Roy Morgan Research’s alcohol data, please contact:

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Related research findings

View our [extensive range of alcohol profiles and reports](#), including [Liquor Store customer profiles](#) such as the [Dan Murphy’s Customer profile](#) and the [BWS customer profile](#).

Compiled with data from Roy Morgan's Single Source survey (the largest of its kind in the world, with 50,000 respondents p.a), these ready-made profiles provide a broad understanding of the target audience, in terms of demographics, attitudes, activities and media usage in Australia.

About Roy Morgan Research

Roy Morgan Research is the largest independent Australian research company, with offices in each state of Australia, as well as in Indonesia, the United States and the United Kingdom. A full service research organisation specialising in omnibus and syndicated data, Roy Morgan Research 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
7,500	±1.1	±1.0	±0.7	±0.5
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