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ROY MORGAN

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FOR IMMEDIATE RELEASE

Bickford’s narrows the gap to Cottee’s, Diet Cordial gains momentum

New research from Roy Morgan reveals that over 4 million Australians purchase cordial in an average four weeks in the year to March 2019. Australian cordial giant Cottee’s, which has traditionally been the most popular cordial brand in Australia, is now being challenged for top spot by South Australian owned Bickford’s.

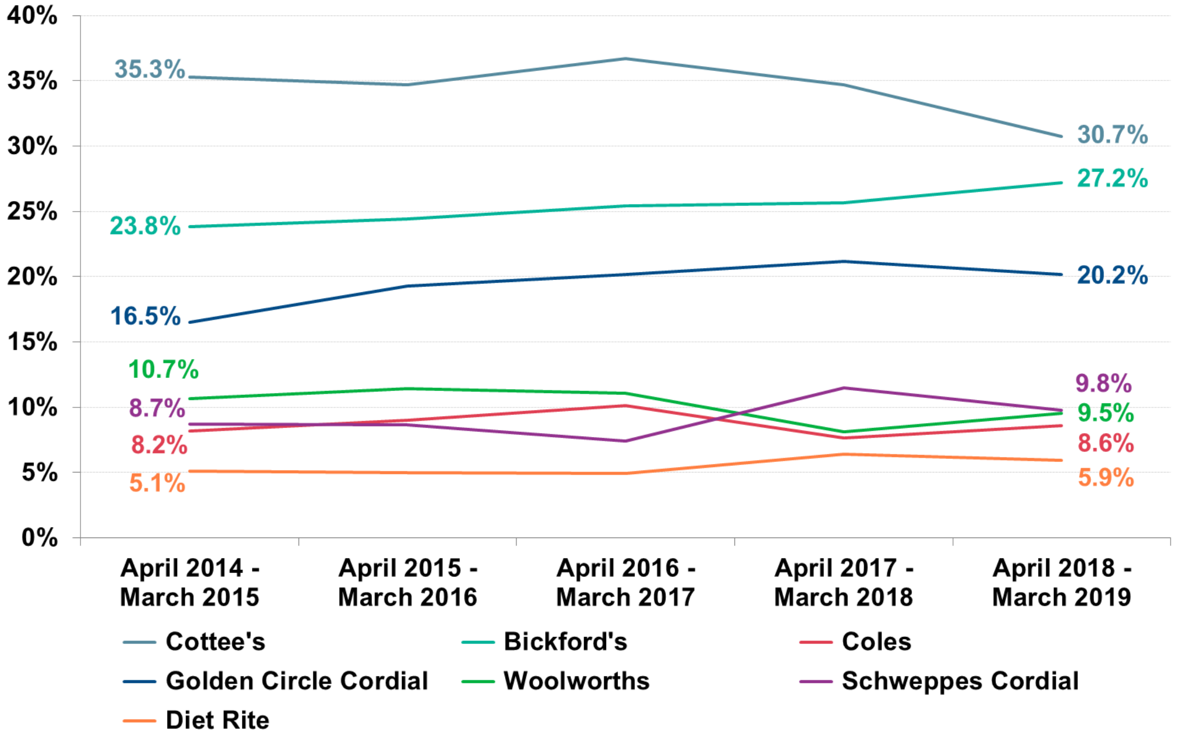
Cottee’s is still the leading cordial brand purchased by 30.7% of cordial customers, down 4.6ppts from four years ago, and now just ahead of Bickford’s which was bought by 27.2% of cordial customers, up 3.4ppts from 2015.

Golden Circle Cordial has also gained traction in Australian fridges, with 20.2% of Australian cordial customers buying the brand in an average four weeks, up 3.7ppts from four years ago. Another success story in the Australian cordial industry is Schweppes Cordial – five years ago they were only purchased by 8.7% of cordial customers, now they sit just shy of 10%.

Diet Rite, the largest exclusively diet brand of cordial in Australia, has seen marginal growth in the last five years with 5.9% of cordial customers now purchasing Diet Rite up from 5.1% four years ago. The growth for Diet Rite has come as diet cordial has become more popular now purchased by 16.2% of cordial customers, up from 13.9% four years prior.

Australia’s two leading supermarkets Woolworths and Coles are again locked in a battle for a larger share of Australia’s cordial customers, with Woolworths private label cordials dropping marginally from 10.7% four years ago to 9.5% and Coles private label cordials rising slightly from 8.2% to 8.6%.

Cordial brands purchased in an average 4 weeks by cordial customers



***Source**: Roy Morgan Single Source (Australia), April 2014 – March 2019. **Base**: Australians 14+ who have purchased cordial in the last 4 weeks, n=16,444.*

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AB & C Socio-Economic Quintiles favour Bickford's while E & FG Quintiles buy Cottee's

The success or failure of a cordial product is tied to the customers a particular brand appeals to and there are significant differences between the customer bases of Australia's leading cordial brands.

For instance, Bickford's primary customer base comes from the high-end AB and C Socio-Economic Quintiles who comprise 45% of Bickford's customer base of over 1.1 million Australians.

In comparison both of Bickford's leading rivals Cottee's and Golden Circle Cordial appeal strongly to the lower-end E and FG Socio-Economic Quintiles. Over 52% of Golden Circle Cordial's 820,000 cordial customers and 45% of Cottee's 1.25 million cordial customers are in the E or FG quintiles.

In addition, Bickford's is popular with customer who live alone, or live with their partner but with no children, while Cottee's is more popular among partners with children, and single parents.

Food attitudes influence what types of cordials Australians choose to buy

Demographics aren't the only measure that cordial consumption sees a correlation with. Roy Morgan asks respondents a number of statements to understand people's views on food and what drives the motivations of customers to purchase particular brands or companies. For instance Australian cordial buyers are far more likely to agree that '*I seldom have time for breakfast*', than the average Australian.

On a brand level Australians agreeing that they '*prefer to eat healthy snacks'*, are more likely to be customers of Bickford's than either Cottee's or Golden Circle while those agreeing that *'Taste is more important than ingredients'* are more likely to buy Cottee's than Bickford's.

In the growing diet cordial market consumers are more likely to agree with the statements *'I restrict how much fattening food I eat'* and *'I'm constantly watching my weight'* than customers of other cordial brands.

Michele Levine, CEO of Roy Morgan, says:

> *"Over 4 million Australians buy cordial in an average four weeks and competition between Australia's leading cordial brands has really intensified in recent years as traditional favourite Cottee's is challenged by Bickford's and Golden Circle Cordial.*
>
> *"Now 1.25 million Australians buy Cottee's cordial in an average four weeks compared to over 1.1 million buying Bickford's and over 820,000 buying Golden Circle.*
>
> *"Bickford's is particularly popular with the higher socio-economic quintiles, while Cottee's, and Golden Circle, are preferred by lower quintile customers as well as families and single parents.*
>
> *"Each brand appeals in some way to different customer types, even behaviourally as seen with the various food attitudes and who agrees with them. Brands stand to win big when they identify underserviced customers, and the cordial market is no different, evidenced by the steady rise of diet cordials.*
>
> *"Roy Morgan can offer a number of insights into who buys cordial, and just as importantly who doesn't. To find out more about your industry, contact Roy Morgan to gain a holistic look at the market and develop strategies to "squash" the competition."*

For comments or more information about Roy Morgan's food, drink and other consumer products data, please contact:

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Related research findings

Find out more about Australians who buy cordial including Bickford's, Berri, Cottee's, Golden Circle, Schweppes Cordial, Diet Rite, Coles, Woolworths and our other in-depth food and drink profiles.

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 75 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%
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