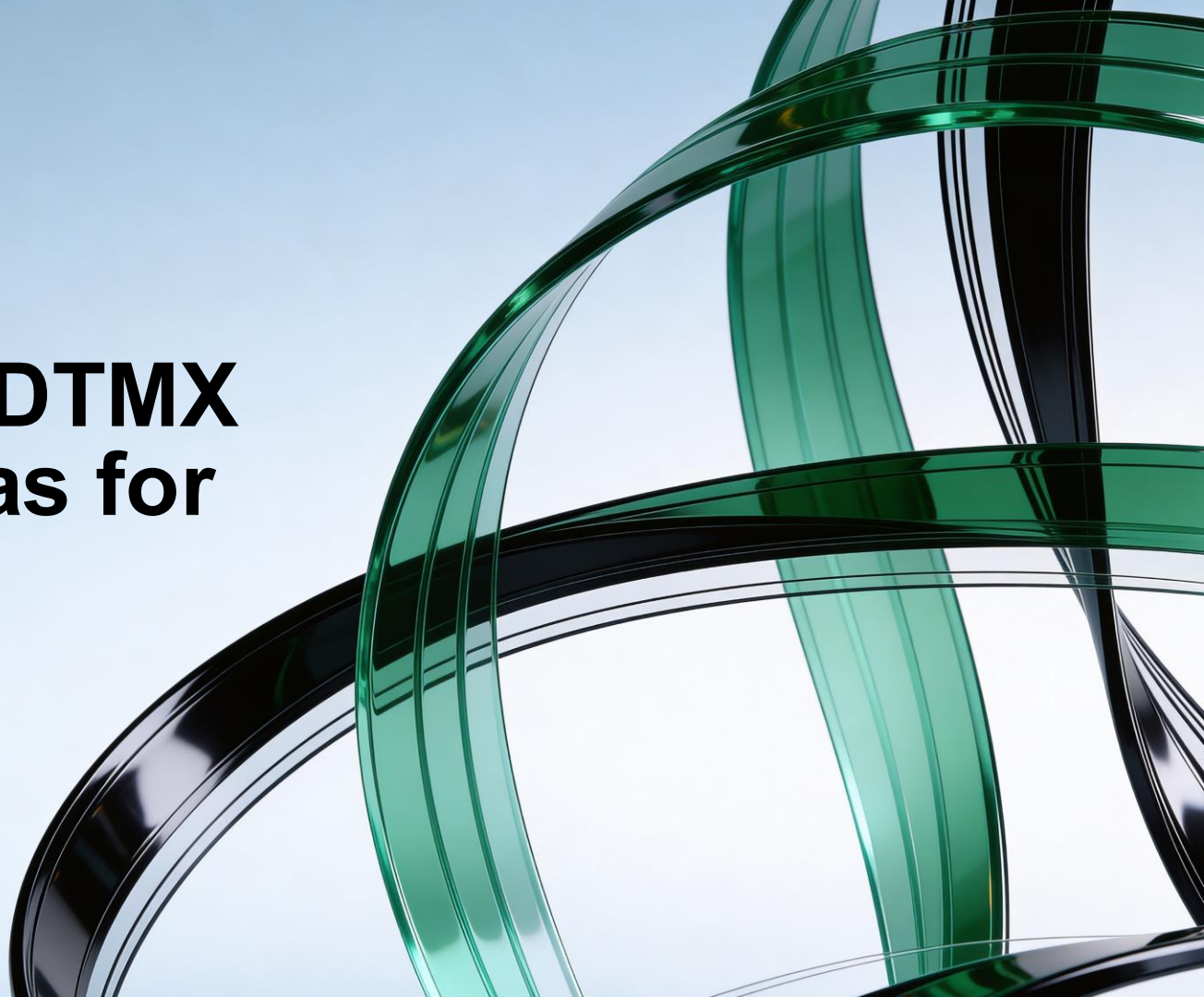


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DTMx 3.0

Coca-Cola DTMX growth ideas for **Australia**

From Consumer and market insights



We're embedded in Australia

26m

Population

\$13.25B

Soft drinks market

19%

Australians drink
Coke Classic weekly

~65%

Woolworths and Coles
combined grocery market share

KEY DISTINCTIONS

BBQs & Outdoors: BBQ is the #1 at-home social occasion. 71% hosted a gathering last year; 36% monthly. Camping, beach, and road trips are all outdoor moments with friends, where bring your own is the norm.

Pubs & Mixers: CSDs show up prominently in pubs and clubs as a mixer. Aussies drank out 28 times on average in 2024 (+22% YoY). When Australians splurge, dining out is the #1 choice.

Car Culture: Drive-through bottle shops are uniquely Australian. The servo stop is a road trip ritual.

Sports Nation: AFL, cricket, rugby league, surfing, and NRL are cultural touchpoints.

AUSTRALIA

AT A GLANCE

DIGITAL EMBEDDEDNESS



CULTURAL EMBEDDEDNESS OF SODA



ON/OFF CONSUMPTION LEAN



RETAIL ECOSYSTEM



We know your competitive growth context

01



Shift to morning culture

Shift among under-35s toward healthier lifestyles, including participation in run clubs and morning activities.

02



Retail duopoly squeezes brand visibility

Woolworths and Coles control ~63% of grocery; their private label and promotional clutter mean non-promoted brands struggle to stand out.

03



Hospitality insolvency and on-trade fragility

With rent, labor, and food prices rising, Australian businesses are entering insolvency at the highest rate in four years—hospitality is one of the hardest-hit industries. 47% of operators cite rising food/supply costs as their biggest concern.



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We can help you grow

Coca-Cola is already part of Australian culture. The challenge is keeping pace with how Australians are living.

Cut through the cluttered retail environment with POSM innovation

The ACCC's behavioral research found Australian shoppers are "cognitively overloaded" by supermarket environments.

- More than half of all products at Coles and Woolworths are on promotion at any given time
- 1 in 4 shoppers can't tell a real discount from a label; defaulting to promotional signage cues rather than comparing value
- Non-promotional POSM must work harder to even register as distinct

The opportunity is to design POSM that doesn't compete with the promotional clutter—it breaks out of it. 3D displays, and sensorial formats that trigger through visual disruption.



Win the drive-through approach by winning driver attention

Australia has one of the highest car ownership rates globally at 78.2%, and the car-first creates purchasing moments unique to this market.

- 42% of Australians plan a road trip every six months—and the servo stop and bottle-o run are embedded rituals of that journey
- The drive-through bottle-o is a format that barely exists anywhere else in the world. Drivers need to know what they want before arriving, so there is limited time to influence purchase decisions in the drive-through setting

The opportunity is to own the approach; bollard wraps, entrance-gate displays, and digitally triggered signage that intercept the driver before they've committed to a choice.

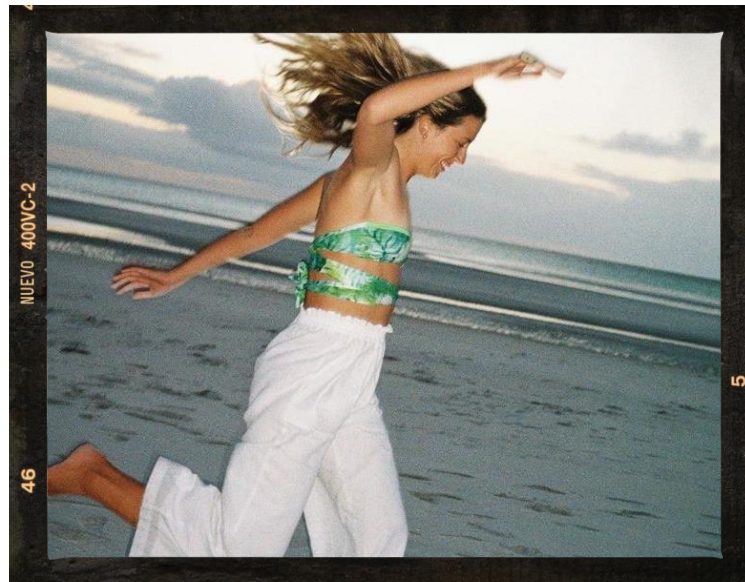


Bring “better for you” messaging to diverse morning spaces

Morning fitness culture is booming. Run club participation surged 59% in 2024 as younger audiences shift socializing to earlier in the day with wellness focus.

- 49% of Australians cite physical health and wellness as their absolute highest priority
- Gen Z now 4x more likely to want to meet people through working out than at bars or clubs

The opportunity is to align zero-sugar variants, hydration, and functional beverages with the new morning mindset at run clubs, beach fitness, sunrise swims.



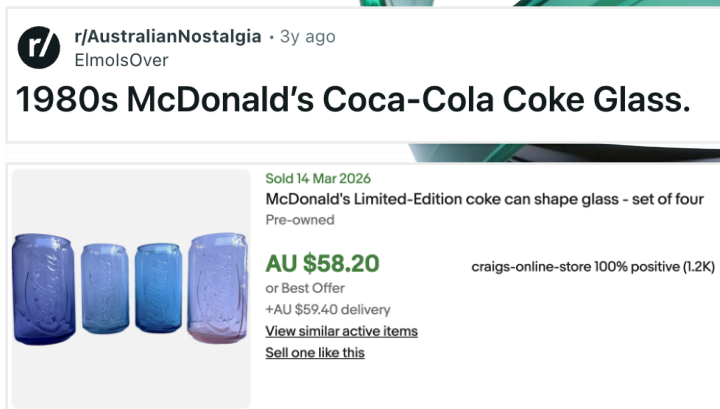
Sources: Strava/YouGov.


Capitalize on Australia's heritage merch culture

Australia has a proven appetite for branded merch, and the cultural embeddedness of Coca-Cola means Australians are distinctly receptive to their releases.


- Australia's branded merch market hit \$1.07B in 2025, growing at ~4% a year. Drinkware is the fastest-growing category, with 63% of items kept for 2+ years
- McDonald's x Coke glass promotions have run across multiple eras in Australia, each becoming a sought-after collectible still traded on Gumtree and eBay years later

The opportunity is to build on this proven collectability—extending beyond traditional Coca-Cola glassware and stubby holders, and elevating functional outdoor merch (Esky coolers, sport bottles, camping gear) into always-on activations, not just QSR gift-with-purchase moments.



 r/AustralianNostalgia · 3y ago
ElmolsOver

1980s McDonald's Coca-Cola Coke Glass.



Sold 14 Mar 2026
McDonald's Limited-Edition coke can shape glass - set of four
Pre-owned

AU \$58.20
or Best Offer
+AU \$59.40 delivery
[View similar active items](#)
[Sell one like this](#)

craigs-online-store 100% positive (1.2K)

Diversify POSM for Australia's evolving sport calendar

Australia's sporting landscape is expanding beyond AFL and NRL, from record-breaking mega-events and fast-growing community sports.

- The Melbourne F1 saw a record 465K fans with expanded experiential zones. The Australian Open hit 1.22 million attendees in 2025. Beverage brands like Grey Goose, Lipton and Waterdrop are central to the fan experience
- New sports are scaling. Pickleball debuted at the Australian Open in 2025. Padel might be at Brisbane 2032

The opportunity is to match Australia's diverse sporting calendar with POSM that leans into the cultural codes of each space. Premium activations at mega-events and localized, grassroots branding for new sports. We can show up early and own these spaces as they scale.





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Thank
you