A division of the IWSR Group

United Kingdom

Sparkling Wine Landscapes 2023

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Wine Intelligence Viewpoint

Sparkling wine continues to grow in the UK, with evidence of a maturing consumer base that is increasingly confident in its preferences

Sparkling wine continues on a positive trajectory in the market, with the annual and monthly sparkling wine drinking population both growing by just over 2 million from 2019. This growth is also reflected in volumes, with sparkling wine making up a larger proportion of the wine sold in the UK.

This is a continuation of COVID-era trends, with wine drinkers growing more accustomed to consuming sparkling wine at home and in more casual occasions. This is reflected in the growth in the belief sparkling is suitable for more casual occasions.

There is evidence the newer sparkling wine drinkers are maturing in their tastes. Sparkling wine drinkers are more likely to stick with what they know, suggesting a decent amount of experience in the sector. They are also generally more engaged with the category, reporting higher levels of interest in it.

In recent years, Prosecco has performed very well in the market and still leads in terms of reported consumption. However, there are signs the category may be doing less well. Fewer see it as high quality or good value for money. The category could be a victim of its own success, with its ubiquity meaning drinkers may increasingly associate it with lesser quality versions of the beverage. This decline in perceptions could have an impact on the performance of Prosecco within the UK market, while other categories like English Sparkling compete for market share.

The sparkling wine category seems to be developing an issue around recruiting younger drinkers to the category, with significantly fewer LDA–24s involved with the drink than in 2019.

Opportunities

Growing drinking population.
English sparkling wine's rise
Increasing enthusiasm for the category

Threats

Increasingly rigid approach to the category.
Recruiting younger drinkers.
Decline of Processo perceptions.

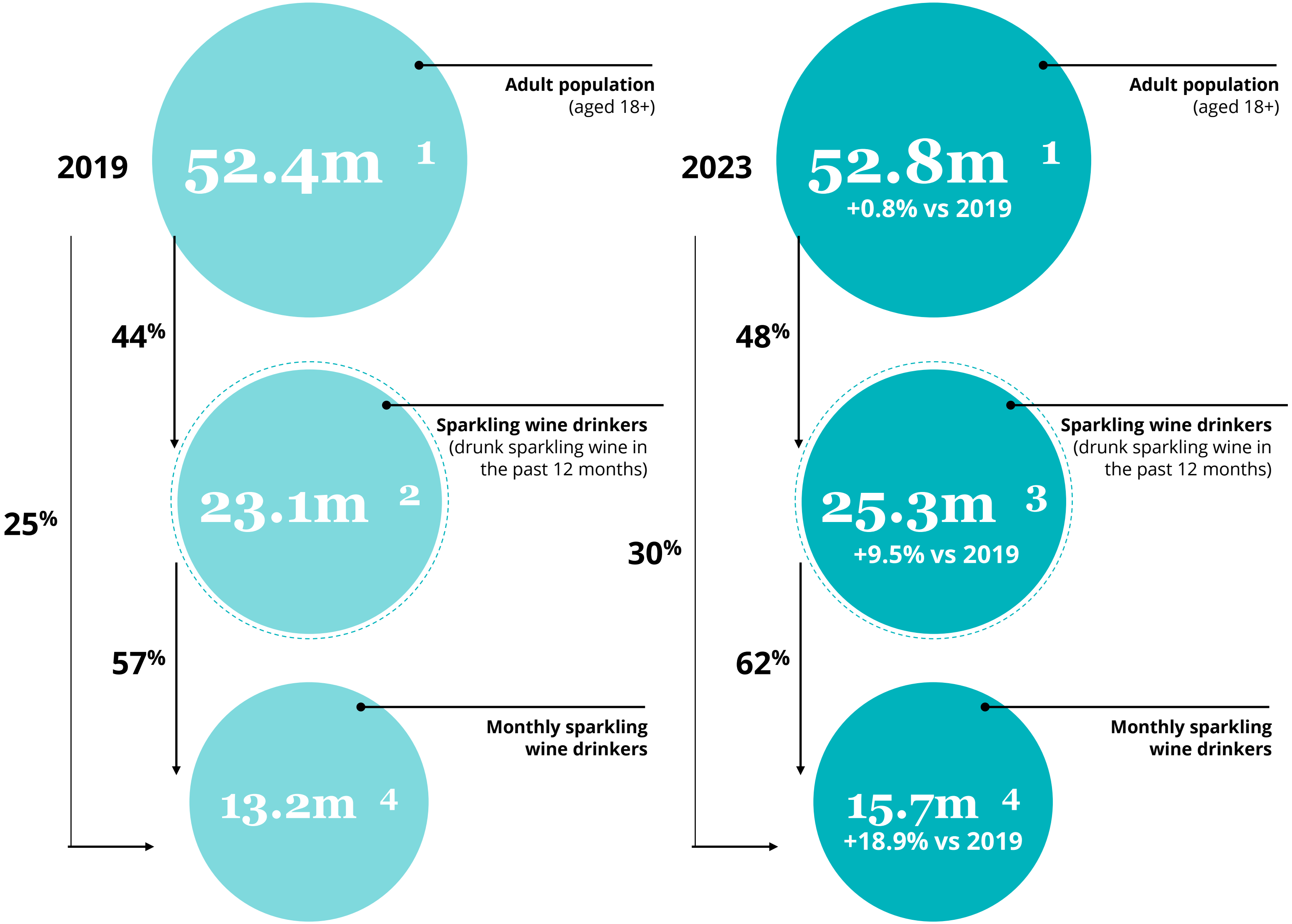
Management Summary

Sparkling Wine in the UK Market

2023

1. A third of the adult population drinks sparkling wine monthly

The sparkling wine-drinking population in the UK has grown since 2019. The category has an additional 2.2 million annual sparkling wine drinkers and a further 2.5 million monthly drinkers. However, there has been a decline in the annual and monthly wine drinking population since our 2022 report



1 ONS, 2021 census data released 2022, Scotland population estimates
2 Wine Intelligence online calibration study with Opinium, November 2019 (n=2,000) UK adults 18+ years - Drinkers of at least one type of sparkling wine in the past 12 months
3 Wine Intelligence online calibration study, June 2022 and May 2023 (n=2,507) UK adults 18+ years - Drinkers of at least one type of sparkling wine in the past 12 months
4 Wine Intelligence, Vinitrac® UK, May '19, Jun '23, (n≥1,010) drinkers of sparkling wine in the UK

2. Sparkling increases its market share

Sparkling was the only wine category to experience growth in volumes in the UK between 2017 and 2022, although, like all other wine segments, it experienced decline between 2021 and 2022.

Sparkling wine has increased its share of the UK wine market, from 12.4% in 2017 to 14% in 2022, and is forecast to reach 15.1% in 2027

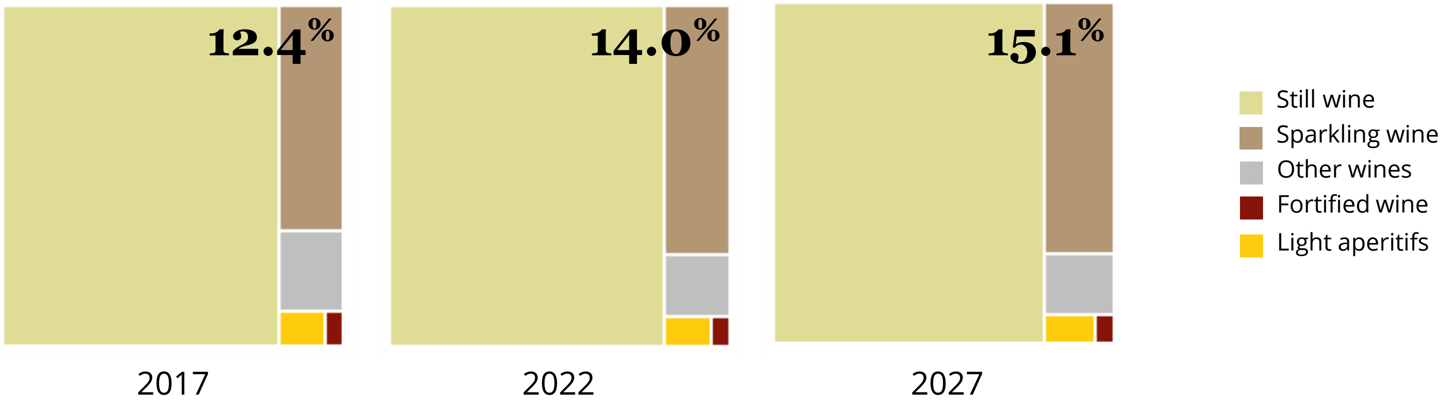
Total beverage alcohol market volumes by category

000s 9-litre cases

	2021	2022	CAGR 17-22	CAGR F 22-27
Total Wine	138,284.78	128,263.37	-2.0%	-1.9%
Still Wine	111,529.03	103,106.05	-2.2%	-2.1%
Sparkling Wine	18,793.05	18,008.35	0.4%	-0.5%
Other Wines*	5,286.25	4,823.55	-5.2%	-2.4%
Fortified Wine	1,967.05	1,665.22	-3.3%	-2.6%
Light Aperitifs	709.40	660.20	-2.8%	-3.7%

Sparkling wine market share

in % of total wine category



*Other Wines includes non-grape based wines

IWSR, July 2023

3. A growing preference for what they know

Drinkers are increasingly rigid and stick to the sparkling wines they know. This could be because new drinkers who entered the category during the pandemic becoming more certain about what they enjoy. Enthusiasm for the category has increased, with greater numbers saying they have a strong interest in the beverage and that it is important to their lifestyle

Attitudes towards sparkling wine: Tracking

% who have selected the following statements to be applicable to them
Base = All UK drinkers of sparkling wine (n≥1,010)

	2019 (n=1,010)	2022 (n=2,000)	2023 (n=2,021)	Tracking vs. '19	Tracking vs. '22
I enjoy trying new and different styles of sparkling wine on a regular basis	34%	31%	33%	→	→
I don't mind what sparkling wine I buy so long as the price is right	30%	30%	25%	↓	↓
I know what sparkling wine I like and I tend to stick to what I know	37%	39%	41%	↑	→

Sparkling wine involvement, value and expertise: Tracking

% who 'agree' or 'strongly agree' with the following statements
Base = All UK drinkers of sparkling wine (n≥1,010)

Ranking '23		2019 (n=1,010)	2022 (n=2,000)	2023 (n=2,021)	Tracking vs. '19	Tracking vs. '22
1	Drinking sparkling wine gives me pleasure	76%	74%	80%	↑	↑
2	I always look for the best quality sparkling wines I can get for my budget	71%	72%	74%	→	→
3	I like to take my time when I purchase a bottle of sparkling wine	55%	58%	60%	↑	→
4	Deciding which sparkling wine to buy is an important decision	53%	57%	59%	↑	→
5	Generally speaking, sparkling wine is an expensive drink	48%	54%	50%	→	↓
6	I have a strong interest in sparkling wine	37%	41%	42%	↑	→
7	I feel competent about my knowledge of sparkling wine	37%	39%	40%	→	→
8	Sparkling wine is important to me in my lifestyle	34%	38%	39%	↑	→

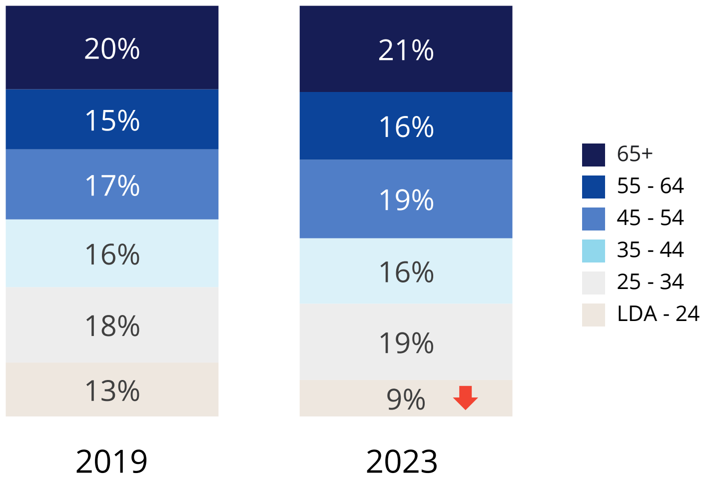
= Represents equal ranking
↑ / ↓: Statistically significantly higher / lower than the previous wave at a 95% confidence level
Source: Wine Intelligence, Vinitrac® UK, May '19, Jun '22, Jun '23, (n≥1,010) drinkers of sparkling wine in the UK

4. Fewer younger people involved in the sparkling wine category

Although the sparkling wine-drinking population has grown, the proportion of LDA-24-year-old drinkers involved with the beverage has declined since 2019. This could be due to broader moderation trends among this demographic and competition from other categories, such as RTDs. The category's potential issue with recruiting younger drinkers could pose a threat to its long-term future

Age: tracking

% of respondents who fall within the following age brackets
Base = All UK drinkers of sparkling wine (n≥1,010)



= Represents equal ranking
↑/↓: Statistically significantly higher / lower than the previous wave at a 95% confidence level
% / %: Statistically significantly higher / lower than all drinkers of sparkling wine at a 95% confidence level
Source: Wine Intelligence, Vinitrac® UK, May '19, Jun '23, (n≥1,010) drinkers of sparkling wine in the UK

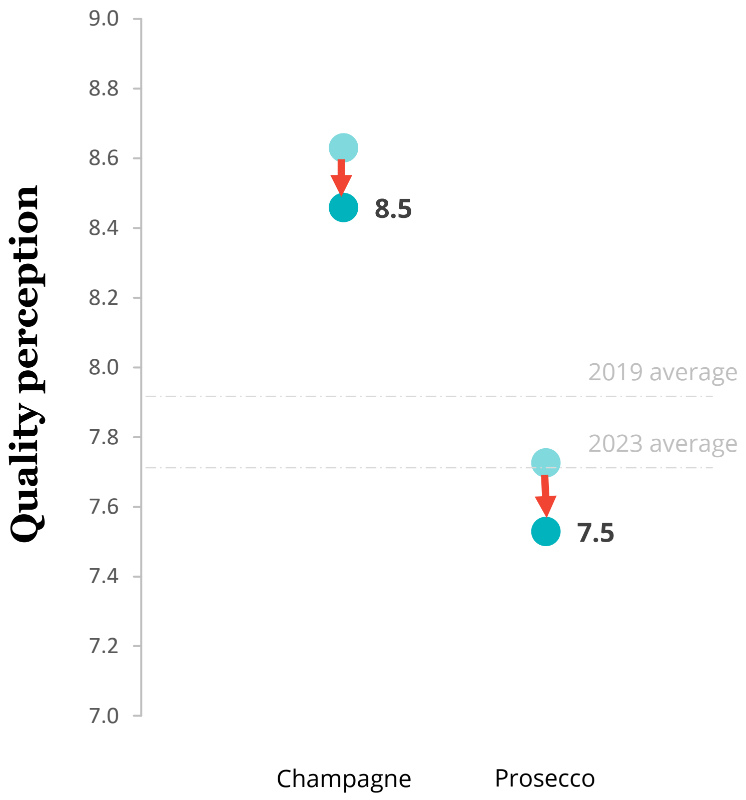
5. Changing perceptions around Prosecco

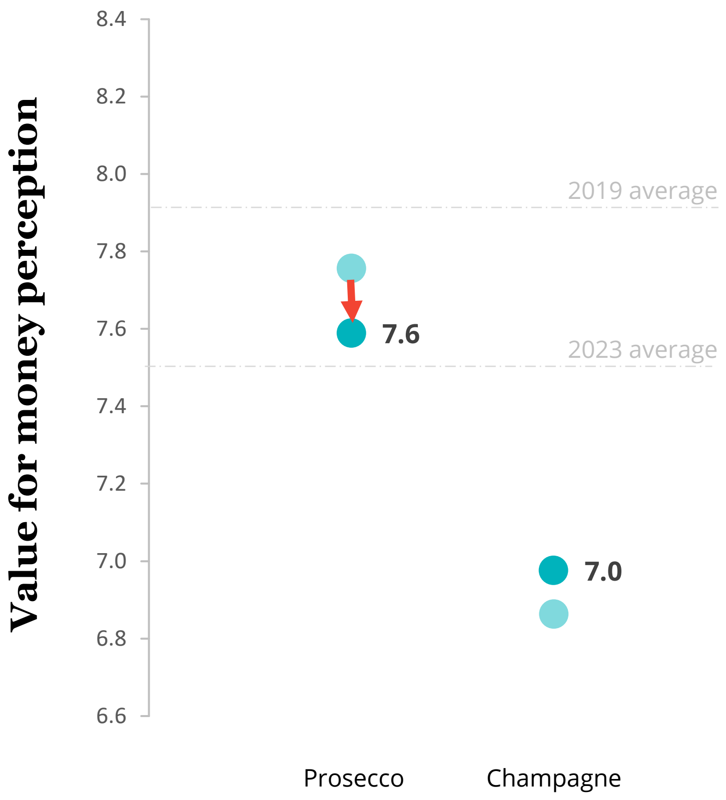
Sparkling wine drinkers in the UK have significantly lower perceptions of the quality of both Champagne and Prosecco. They also feel that Prosecco is not providing the same value for money as in previous years, with the relative ubiquity of the product in the market perhaps driving these changes.

These perception shifts could have an impact on the performance of Prosecco in the UK

Drinker's perception: Champagne and Prosecco

Mean quality perception, participants indicated their view of the quality or value for money of the following sparkling wine types on a scale of 0 –10
Base = Those who have drunk the following sparkling wine types





: 2019, : 2023
/ : Statistically significantly higher / lower than 2019 at a 95% confidence level
Source: Wine Intelligence, Vinitrac® UK, May '19, Jun '23, (n≥1,010) drinkers of sparkling wine in the UK

6. Prosecco is starting to decline

Prosecco has experienced a large year-on-year decrease in volumes sold in the UK, after a post-pandemic boom in sales. Overall, the category flatlined between 2017 and 2022, with its share of the sparkling wine category decreasing by 2.1%. Prosecco is forecast to continue to decline until 2027, although at a slower pace than other sparkling wine categories

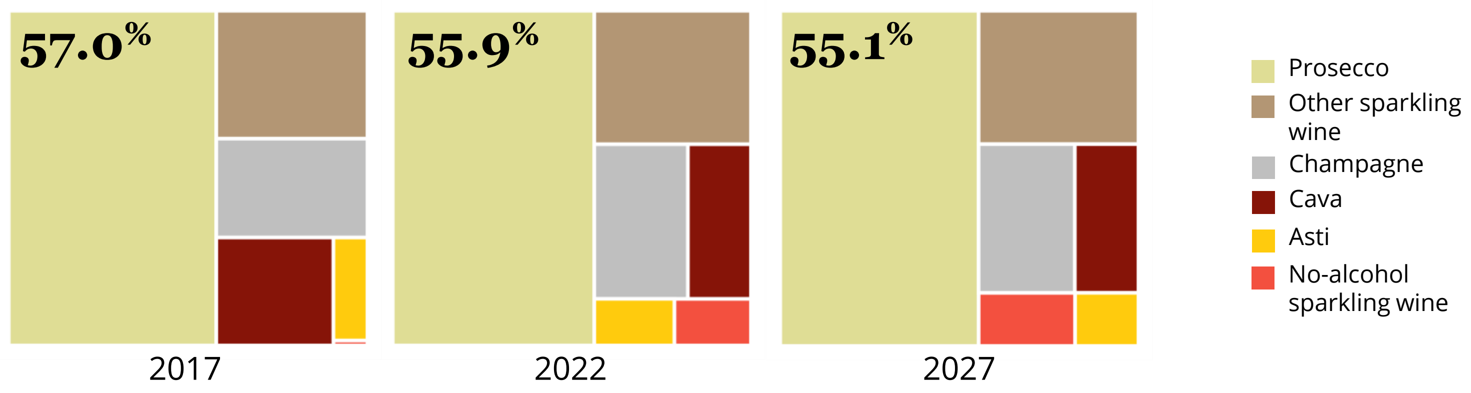
Total sparkling wine market volumes by category

000s 9-litre cases

	2021	2022	CAGR 17-22	CAGR 21-22	CAGR F 22-27
Total Sparkling Wine	18,793.10	18,008.40	0.4%	-4.2%	-0.5%
Prosecco	10,613.70	10,077.00	0.0%	-5.1%	-0.8%
Other Sparkling Wines	3,235.20	3,128.90	2.2%	-3.3%	-0.1%
Champagne	2,187.50	2,160.50	0.0%	-1.2%	-0.7%
Cava	1,472.60	1,458.00	-4.5%	-1.0%	-1.1%
Asti	602.50	559.00	1.9%	-7.2%	-2.4%
No-Alcohol Sparkling Wine	579.80	536.00	84.5%	-7.6%	7.0%
Flavoured Sparkling Wines	93.00	80.00	-19.5%	-14.0%	-3.8%
Low-Alcohol Sparkling Wine	8.80	9.00	-1.6%	2.3%	0.8%

Total sparkling wine market share*

in % of total wine category



*Flavoured sparkling wines and low-alcohol sparkling wine omitted from chart due to small market share (<1%)

IWSR, July 2023

Management Summary

Top sparkling wine beverages
% who have drunk the following beverages in the past six months

	2019	2023	Tracking
Prosecco	**82%**	**76%**	↓
Champagne	**60%**	**52%**	↓
Pink or Rosé sparkling wine or Champagne	**n/a**	**42%**	n/a
Cava	**44%**	**36%**	↓
Sparkling wine from Australia, New Zealand, USA	**31%**	**26%**	↓

Top alcoholic beverages (other than sparkling)
% who have drunk the following beverages in the past 12 months

	2019	2023	Tracking
White wine	**77%**	**71%**	↓
Red wine	**67%**	**60%**	↓
Beer	**60%**	**59%**	→
Rosé wine	**56%**	**54%**	→
Gin	**51%**	**51%**	→

Most-known sparkling wine brands
% who have heard the following brands in the past six months

	2019	2023	Tracking
Moët & Chandon	**71%**	**61%**	↓
Blossom Hill	**58%**	**54%**	↓
Martini	**59%**	**54%**	↓
Dom Pérignon	**59%**	**53%**	↓
Plaza Centro	**57%**	**52%**	↓

Sparkling wine format purchase in the off-trade
% who have bought the following brands in the past six months

	2019	2023	Tracking
Bottle (750ml)	**83%**	**85%**	→
Single serve bottle	**19%**	**18%**	→
Half bottle (375ml)	**15%**	**15%**	→
Magnum (1.5L)	**18%**	**14%**	↓
Single serve can	**7%**	**8%**	→

↑/↓: Statistically significantly higher / lower than May 2019 at a 95% confidence level
Source: Wine Intelligence, Vinitrac® US, May 2019 - June 2023 (n≥1,043) drinkers of sparkling wine in the UK

Market Data

Sparkling Wine in the UK Market

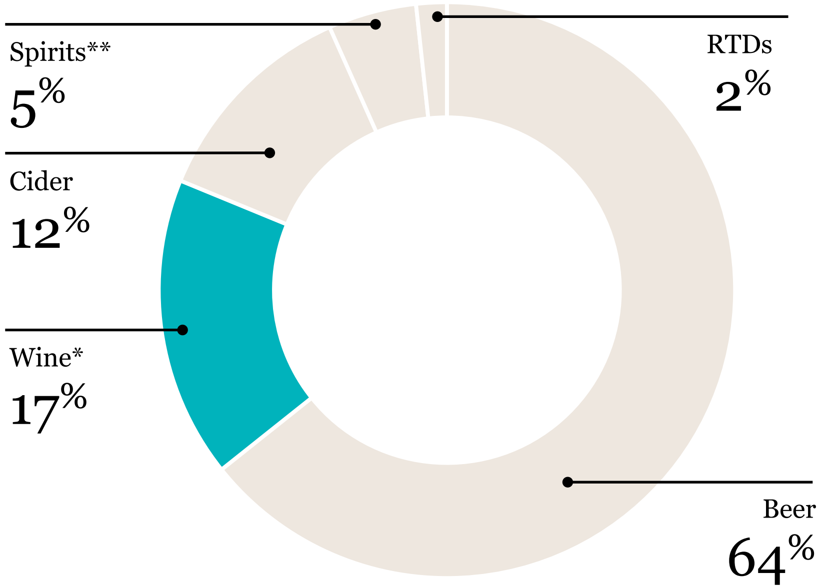
2023

Total beverage alcohol market

Wine accounts for just under a fifth of the UK alcohol market, with beer claiming the biggest share

Total beverage alcohol market share by category

% of purchases that fall within the categories below



Total beverage alcohol market volumes by category

000s 9-litre cases

	2021	2022	CAGR 17-22	CAGR F 22-27
Total beverage alcohol	740,969.78	758,004.81	-0.6%	-0.6%
Beer	464,658.33	487,333.33	-0.1%	-0.4%
Wine*	138,284.78	128,263.37	-2.0%	-1.9%
Cider	86,966.67	91,825.00	-2.9%	-0.2%
Spirits**	38,957.26	37,594.51	2.4%	-0.9%
RTDs	12,102.75	12,988.60	9.5%	1.7%

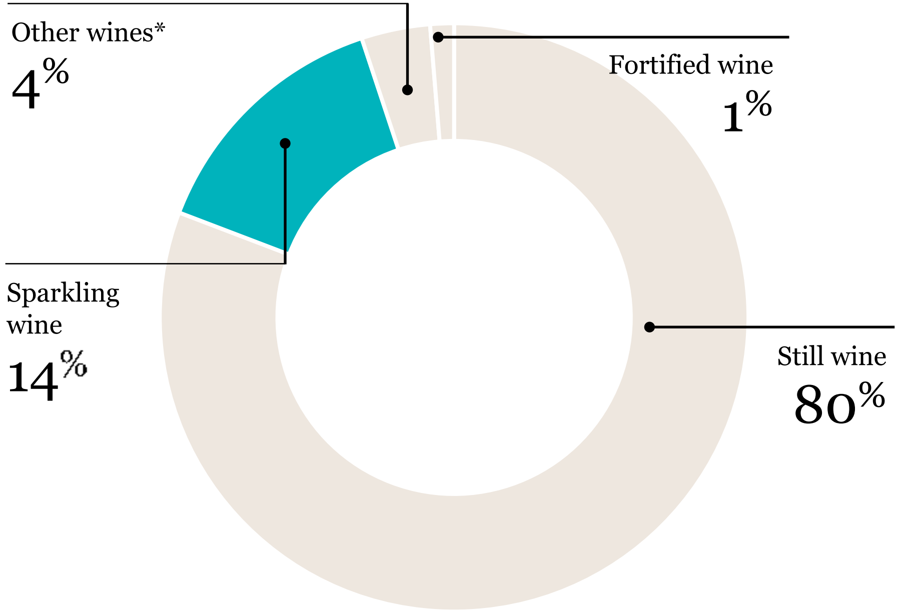
* Wine includes still wine, sparkling wine, fortified wine and light aperitifs
** Spirits include whisky, gin and genever, vodka, agave-based spirits, national spirits, rum, cane, brandy and flavored spirits
Source: IWSR, July 2023

Total wine market

Still wine makes up the bulk of the wine market in the UK, with sparkling accounting for only 14%; sparkling was the only wine sub-category to experience growth between 2017 and 2022

Total wine market share by category**

% of purchases that fall within the categories below



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Fortified Wine	1,967.05	1,665.22	-3.3%	-2.6%
Light Aperitifs	709.40	660.20	-2.8%	-3.7%

* Other wines includes non-grape based wines

** Light aperitifs omitted from pie chart due to small market share (<1%)

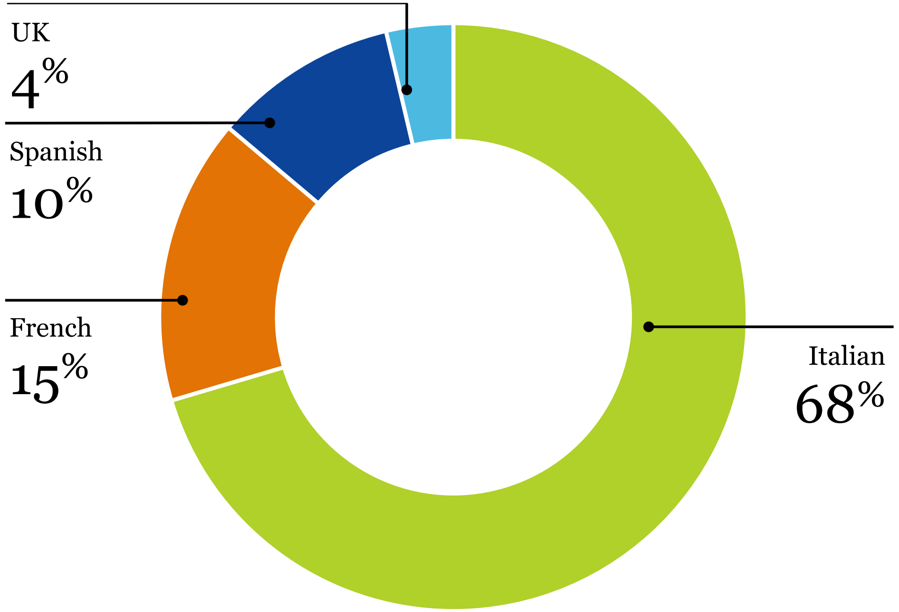
Source: IWSR, July 2023

Sparkling wine volumes by origin

The leading country of origin for sparkling wine in the UK is Italy; domestically produced sparkling wine saw large growth in volumes sold

Sparkling wine market share by origin**

% of purchases that fall within the origin below



Sparkling wine volumes by origin

000s 9-litre cases

		2021	2022	CAGR 17-22	CAGR F 22-27
	Total	18,793.05	18,008.35	0.4%	-0.5%
1	Italian	13,026.60	12,266.50	0.5%	-0.5%
2	French	2,786.75	2,739.75	1.3%	0.1%
3	Spanish	1,786.80	1,771.25	-3.1%	-1.0%
4	United Kingdom	526.90	641.60	11.3%	2.1%
5	International*	206.80	184.55	-0.9%	-6.6%
6	German	147.35	120.65	4.7%	-3.5%
7	Australian	130.00	107.00	-12.6%	1.4%
8	US	52.10	48.00	-9.9%	-8.0%
9	New Zealand	43.00	41.75	-1.9%	0.1%
10	Chilean	35.00	40.00	25.7%	4.1%

* International refers to wine where grapes are from multiple countries of origin

** Other origins omitted from pie chart due to small market share (<1%)

Source: IWSR, July 2023

Sparkling wine retail price by origin

Sparkling wine in the UK sells at an average price equivalent to US$15.64 per bottle; English and French wines have higher average bottle prices than other countries of origin

Historic and forecast growth: Retail price

Five-year CAGR % calculated using a fixed exchange rate

		Retail price per 0.75l 2022 (US$)	CAGR 17-22	CAGR F 22-27
	Average	15.64	2.4%	0.2%
1	Italian	11.15	1.2%	-0.1%
2	French	38.04	2.1%	-0.1%
3	Spanish	9.81	0.3%	-0.3%
4	United Kingdom	27.01	14.7%	0.6%
5	International*	8.60	3.4%	-0.2%
6	German	5.79	0.2%	0.2%
7	Australian	11.75	-0.1%	-0.4%
8	US	11.24	2.6%	1.3%
9	New Zealand	16.98	2.0%	0.7%
10	Chilean	8.79	-4.8%	-0.1%

*International refers to wine where grapes are from multiple countries of origin

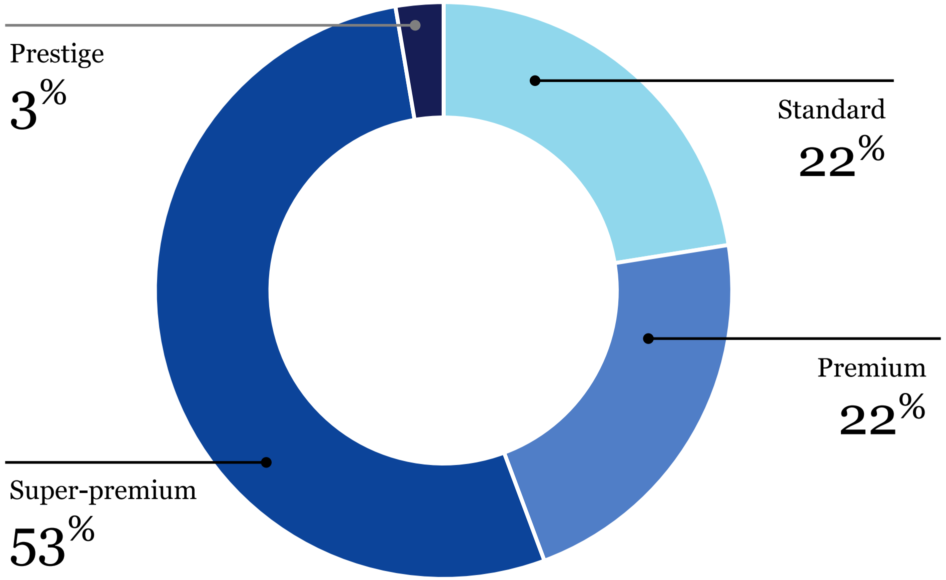
Source: IWSR, July 2023

Champagne by price band

Champagne saw most growth at super-premium and prestige price points

Champagne market share by price band*

% of purchases that fall within the categories below



Champagne volumes by price band

000s 9-litre cases, prices for 75cl bottles equivalent

	2021	2022	CAGR 17-22	CAGR F 22-27
Standard (under GBP 20.00)	**495.00**	**485.50**	**-1.3%**	**-0.4%**
Premium (between GBP 20.00 and 33.99)	**506.75**	**472.00**	**-1.4%**	**-2.1%**
Super Premium (between GBP 34.00 and 119.99)	**1,132.75**	**1,145.00**	**1.0%**	**-0.5%**
Prestige (between GBP 120.00 to 274.99)	**52.75**	**57.75**	**3.1%**	**3.0%**
Prestige Plus (over GBP 275.00)	**0.25**	**0.25**	**0.0%**	**0.0%**

Other sparkling wine data available on the next slide

*Prestige Plus omitted from pie chart due to small market share (<1%)

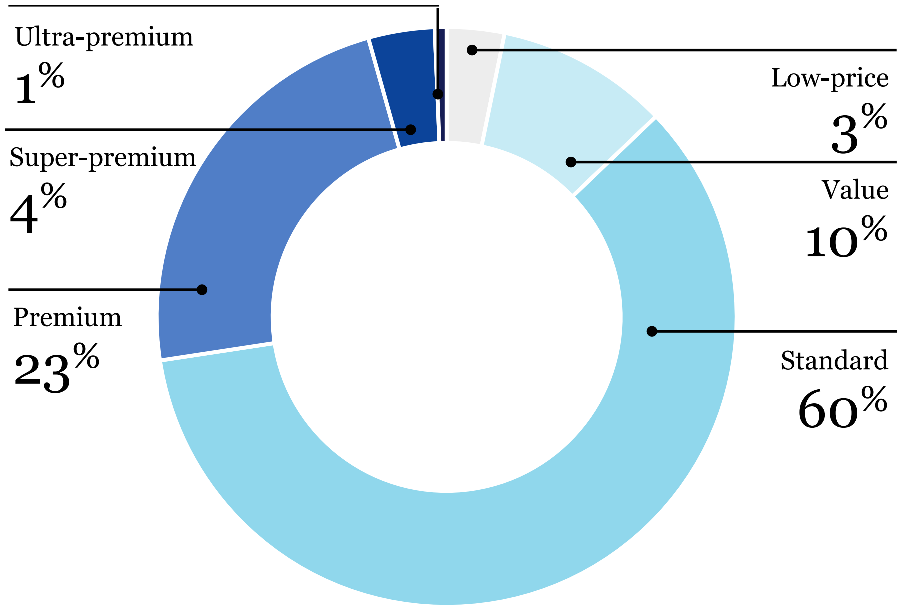
Source: IWSR, July 2023

Other sparkling wine by price band

There has been sizeable growth for sparkling wine at super-premium and ultra-premium price points

Sparkling wine market share by price band

% of purchases that fall within the categories below



Sparkling wine volumes by price band

000s 9-litre cases, prices for 75cl bottles equivalent

	2021	2022	CAGR 17-22	CAGR F 22-27
Low-Price (under GBP 4.00)	555.35	509.25	17.7%	5.7%
Value (between GBP 4.00 and 5.99)	1,641.20	1,526.55	-4.1%	0.1%
Standard (between GBP 6.00 to 9.49)	9,782.66	9,469.30	-0.5%	-1.0%
Premium (between GBP 9.50 and 16.49)	4,113.84	3,652.30	1.2%	-0.7%
Super Premium (between GBP 16.50 and 33.99)	446.50	585.85	20.9%	2.5%
Ultra Premium (over GBP 34.00)	66.00	104.60	31.4%	3.9%

Champagne data available on the previous slide

Source: IWSR, July 2023

Sparkling wine consumption per capita

The UK is a top 20 market for per capita consumption of sparkling wine

Per capita consumption of sparkling wine

Litres per annum (LDA+ adults)

		2021	2022	CAGR 17-22	CAGR 21-22
1	St. Barths	12.47	13.58	8.4%	9.2%
2	St. Martin and St. Maarten	6.29	8.34	2.5%	33.5%
3	Italy	7.87	7.38	-1.2%	-6.2%
4	Turks and Caicos	5.27	6.50	-0.2%	26.0%
5	Germany	5.31	5.51	-1.2%	3.5%
6	Lithuania	4.88	5.06	6.1%	2.5%
7	Latvia	4.47	4.89	1.4%	8.2%
8	France	4.73	4.86	-0.8%	3.1%
9	Guadeloupe	4.17	4.81	-1.3%	16.0%
10	Martinique	4.22	4.43	-4.2%	5.3%
11	Estonia	4.08	4.34	3.3%	5.6%
12	Belgium and Luxembourg	4.28	4.27	-0.8%	0.5%
13	Austria	3.44	3.54	0.6%	3.2%
14	Switzerland	3.23	3.33	1.5%	3.6%
15	Cayman Islands	3.13	3.31	4.2%	7.9%
16	Sweden	3.28	3.30	7.8%	1.1%
17=	United Kingdom	3.16	3.01	0.4%	-4.2%
17=	Slovenia	2.89	3.01	3.0%	4.0%
18	New Zealand	3.13	2.94	-0.1%	-4.8%
19	Reunion	2.55	2.93	1.1%	15.2%
20	US Virgin Islands	3.06	2.92	7.7%	-4.8%

Source: IWSR, July 2023

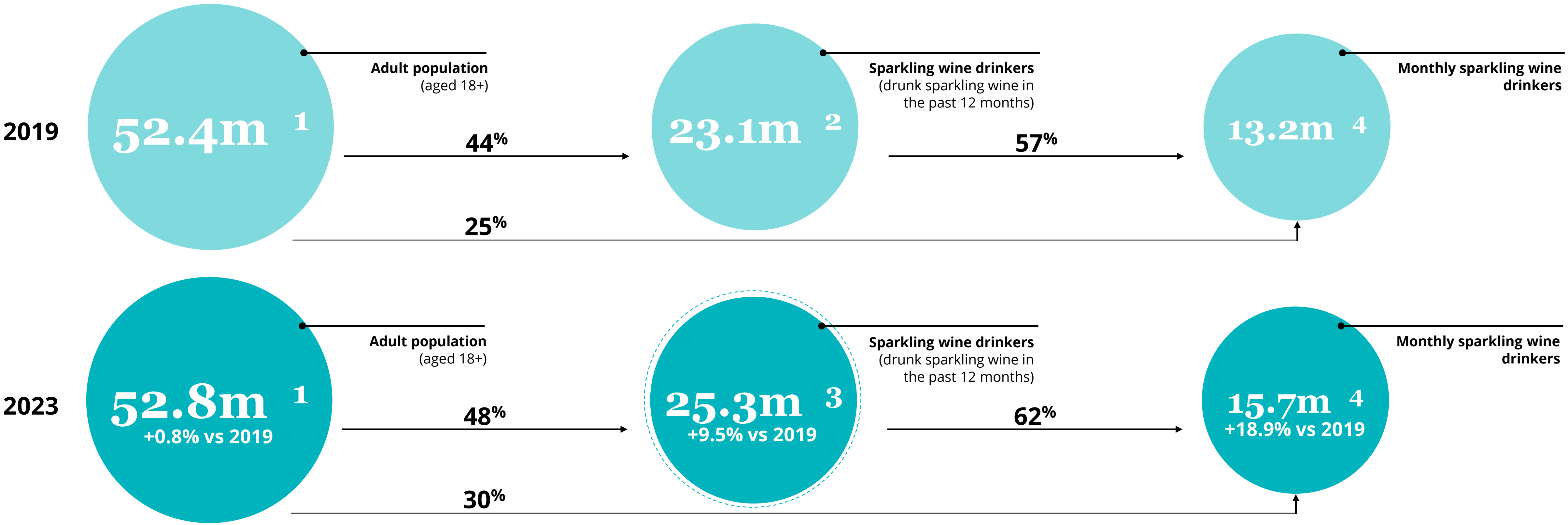
Market Demographics

Sparkling Wine in the UK Market

2023

UK sparkling wine drinkers

The sparkling wine drinking population has grown by 1.8 million annual drinkers and 2.5 million monthly wine drinkers since 2019



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4 Wine Intelligence, Vinitrac® UK, May ’19, Jun ’23, (n≥1,010) drinkers of sparkling wine in the UK

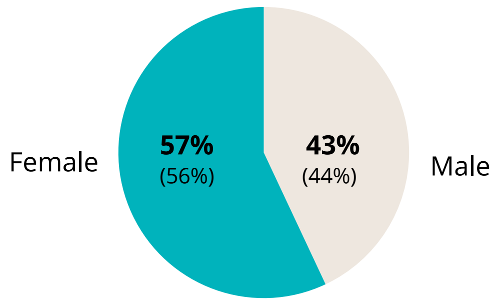
Demographics

The gender and age balance of sparkling wine drinkers in the UK broadly aligns with 2019. The most notable change is an increase in the highest earners, although this is likely to be a consequence of increased wage demands in response to inflation

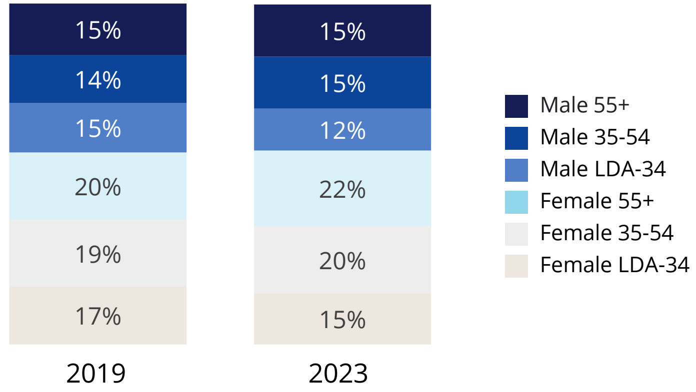
Sparkling wine drinkers, who are they?

All drinkers of sparkling wine in the UK in 2023 compared with 2019

Gender



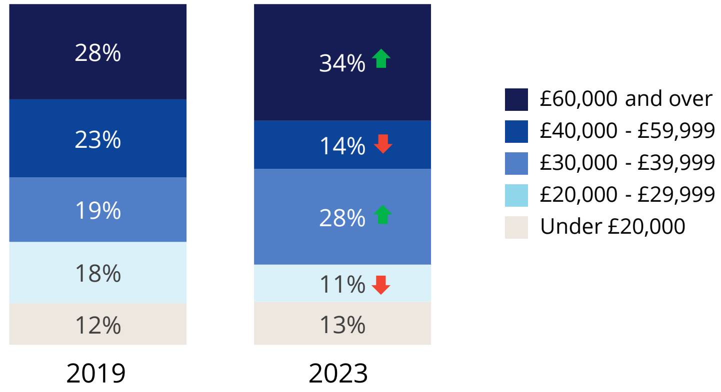
Age



UK Regions

	2019	2023	Tracking
North	22%	29%	↑
East Anglia + South East	22%	25%	→
London	16%	15%	→
Midlands	15%	9%	↓
Scotland	9%	7%	↓
South West	10%	7%	↓
Wales	4%	4%	→
Northern Ireland	3%	3%	→

Income



Data into brackets: 2019 data

↑/↓: Statistically significantly higher / lower than May '19 at a 95% confidence level

Source: Wine Intelligence, Vinitrac® UK, May '19, Jun '23, (n≥1,010) drinkers of sparkling wine in the UK

Drinking Repertoire

Sparkling Wine in the UK Market

2023

Drinking repertoire

Consumption of still wine among sparkling wine drinkers has declined significantly since 2019, indicating that sparkling wine drinkers are losing interest in that category

Other alcoholic beverage repertoire: Tracking, top 15

% who have drunk the following beverages in the past 12 months
Base = All UK sparkling wine drinkers (n≥1,010)

Ranking '23		2019 (n=1,010)	2022 (n=2,000)	2023 (n=2,021)	Tracking vs. '19	Tracking vs. '22
1	White wine	77%	72%	71%	↓	→
2	Red wine	67%	60%	60%	↓	→
3	Beer	60%	56%	59%	→	↑
4	Rosé wine	56%	53%	54%	→	→
5	Gin	51%	52%	51%	→	→
6	Cider	53%	48%	49%	→	→
7	Vodka	44%	41%	42%	→	→
8	Cocktails	39%	35%	41%	→	↑
9	Whisky / Whiskey	37%	35%	36%	→	→
10	Rum	30%	30%	32%	→	→
11	Craft beer	31%	30%	30%	→	→
12=	Liqueurs	30%	28%	28%	→	→
12=	Pre-mixed / ready to drink alcoholic beverages	24%	27%	28%	↑	→
14	Port	26%	21%	21%	↓	→
15	Brandy / Cognac	22%	20%	20%	→	→

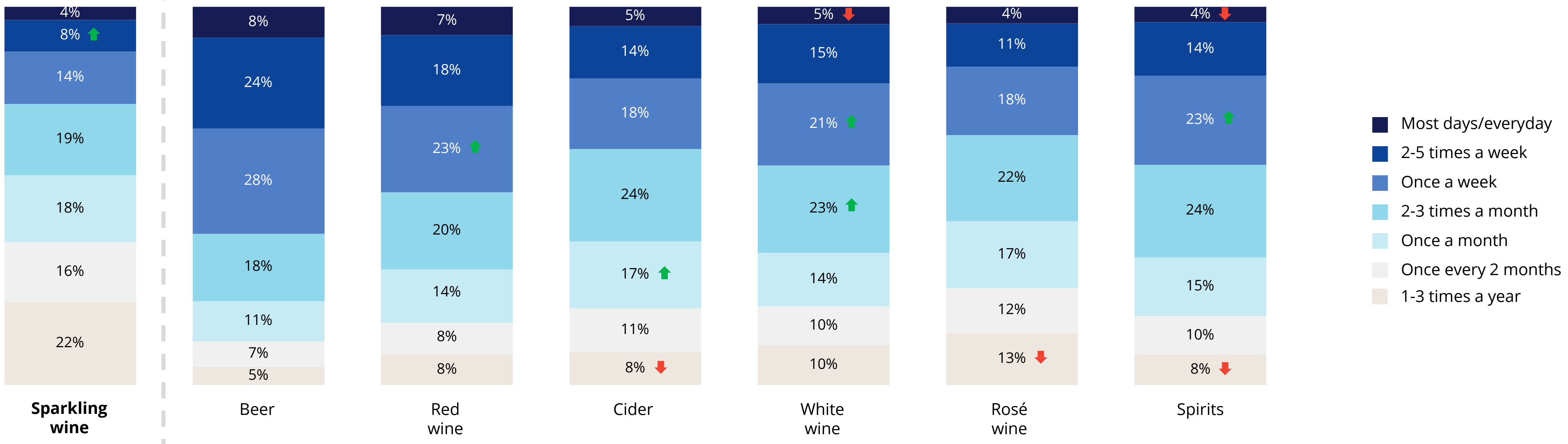
= Represents equal ranking
↑ / ↓: Statistically significantly higher / lower than the previous wave at a 95% confidence level
Source: Wine Intelligence, Vinitrac® UK, May '19, Jun '22, Jun '23, (n≥1,010) drinkers of sparkling wine in the UK

Consumption frequency

A quarter of respondents drink sparkling wine on a weekly basis, the lowest of all categories included in the survey, but the proportion drinking sparkling wine on a weekly basis has increased since 2019

Consumption frequency: sparkling wine and other alcoholic beverages

% who drink the following beverages at the stated frequencies
Base = Those who have drunk the following beverages in the past 12 months



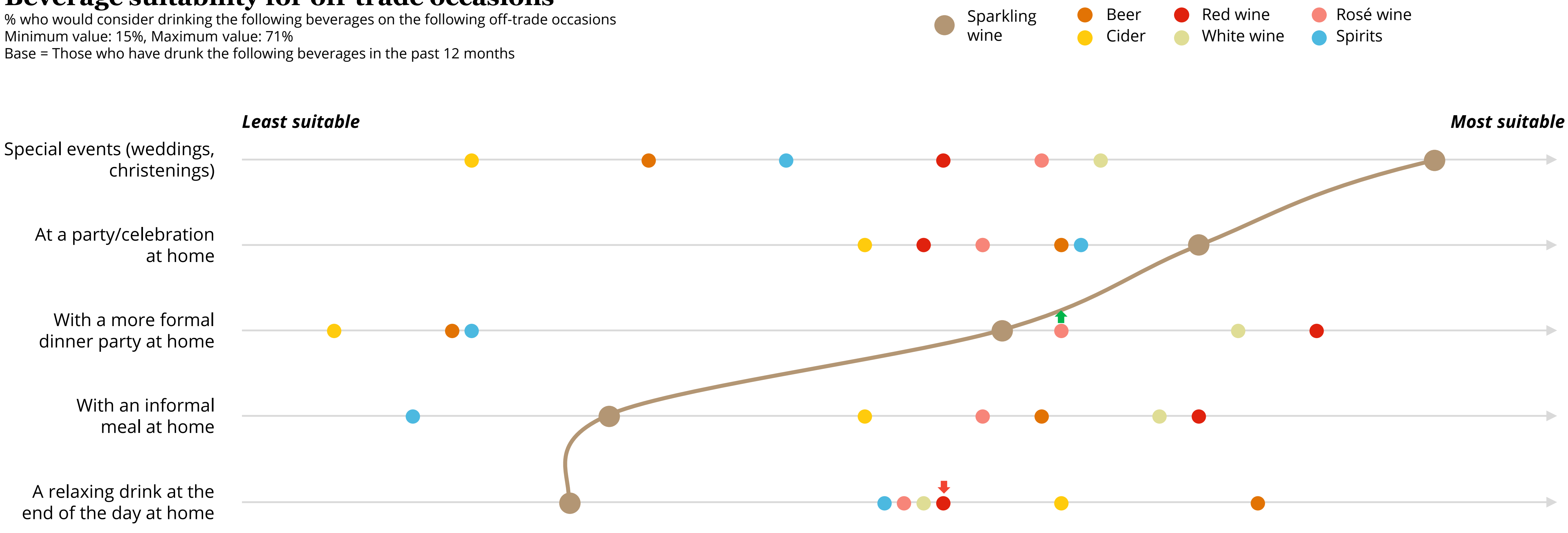
↑/↓: Statistically significantly higher / lower than May '19 at a 95% confidence level
Source: Wine Intelligence, Vinitrac® UK, May '19, Jun '23, (n≥1,010) drinkers of sparkling wine in the UK

Alcoholic beverage suitability

Sparkling wine is the beverage of choice for special events and celebrations

Beverage suitability for off-trade occasions

% who would consider drinking the following beverages on the following off-trade occasions
Minimum value: 15%, Maximum value: 71%
Base = Those who have drunk the following beverages in the past 12 months



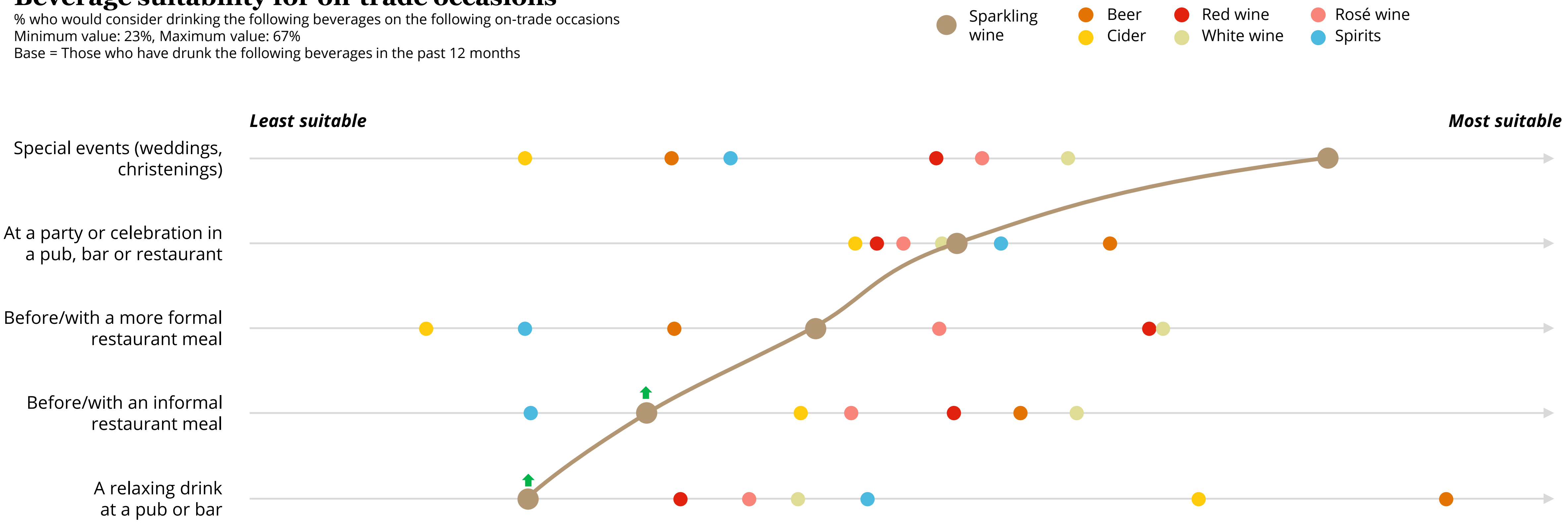
↑/↓: Statistically significantly higher / lower than May '19 at a 95% confidence level
Source: Wine Intelligence, Vinitrac® UK, May '19, Jun '23, (n≥1,010) drinkers of sparkling wine in the UK

Alcoholic beverage suitability

Sparkling wine is increasingly seen as suitable for relaxed, end-of-day drinking and informal meals at home; the gap between drinks for celebratory occasions in the on-trade is relatively small

Beverage suitability for on-trade occasions

% who would consider drinking the following beverages on the following on-trade occasions
Minimum value: 23%, Maximum value: 67%
Base = Those who have drunk the following beverages in the past 12 months



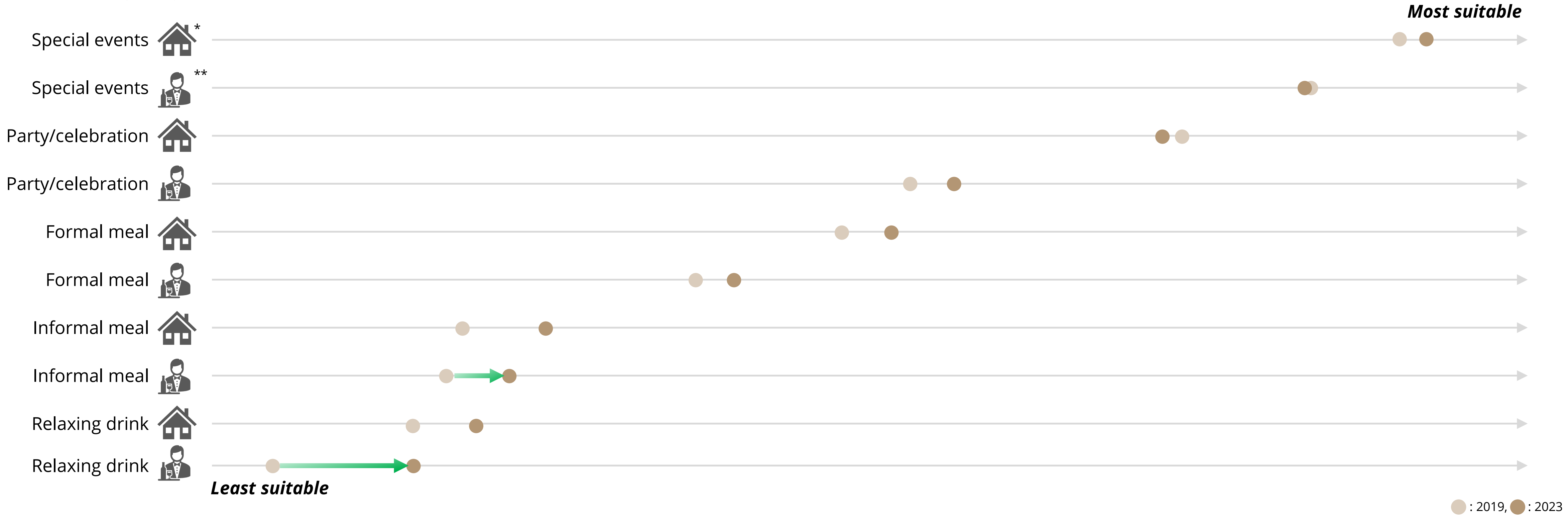
⬆/⬇: Statistically significantly higher / lower than May '19 at a 95% confidence level
Source: Wine Intelligence, Vinitrac® UK, May '19, Jun '23, (n≥1,010) drinkers of sparkling wine in the UK

Sparkling wine suitability

Sparkling wine is viewed as more suitable for on-trade occasions than in 2019, although it is still seen as having the lowest levels of suitability for these occasions

Sparkling wine occasions suitability: Tracking

% who would consider sparkling wine on the following occasions
Occasions sorted by most to least suitable
Base = All drinkers of sparkling wine (n≥1,043)



* On-trade
** Off-trade

Source: Wine Intelligence, Vinitrac® US, May 2019 - June 2023 (n≥1,043) drinkers of sparkling wine in the UK

Consumption Behaviour

Sparkling Wine in the UK Market

2023

Consumption frequency

Consumption of sparkling wine is broadly similar to before the pandemic, although there has been a slight increase in weekly levels of consumption

Consumption frequency of sparkling wine: Tracking

% who drink sparkling wine at the stated frequencies
Base = All UK drinkers of sparkling wine (n≥1,010)

	2019 (n=1,010)	2022 (n=2,000)	2023 (n=2,021)	Tracking vs. '19	Tracking vs. '22
Most days / every day	**4%**	**3%**	**4%**	→	→
2-5 times a week	**5%**	**9%**	**8%**	↑	→
Once a week	**13%**	**15%**	**14%**	→	→
2-3 times a month	**16%**	**18%**	**19%**	→	→
Once a month	**18%**	**16%**	**18%**	→	→
Once every two months	**19%**	**16%**	**16%**	→	→
1-3 times a year	**25%**	**23%**	**22%**	→	→

26% consume sparkling wine on a weekly basis (↑ vs 22% in 2019)

↑ / ↓: Statistically significantly higher / lower than the previous wave at a 95% confidence level
Source: Wine Intelligence, Vinitrac® UK, May '19, Jun '22, Jun '23, (n≥1,010) drinkers of sparkling wine in the UK

Consumption frequency

Younger men are an increasing force in sparkling wine consumption in the UK market, with greater proportions of them becoming frequent consumers

Consumption frequency of sparkling wine, by gender and age

% who drink sparkling wine at the stated frequencies
Base = All UK drinkers of sparkling wine (n=2,021)

	All drinkers of sparkling wine in the UK (n=2,021)	Male LDA-34 (n=249)	Male 35-54 (n=309)	Male 55+ (n=309)	Female LDA-34 (n=303)	Female 35-54 (n=400)	Female 55+ (n=446)
Most days / every day	4%	14%	4%	0%	4%	2%	1%
2-5 times a week	8%	17%	14%	3%	9%	8%	3%
Once a week	14%	21%	23%	8%	12%	14%	8%
2-3 times a month	19%	19%	14%	17%	21%	26%	15%
Once a month	18%	13%	17%	24%	16%	15%	20%
Once every two months	16%	7%	12%	17%	16%	18%	21%
1-3 times a year	22%	9%	17%	31%	22%	16%	32%

34% of male drinkers consume sparkling wine on a weekly basis

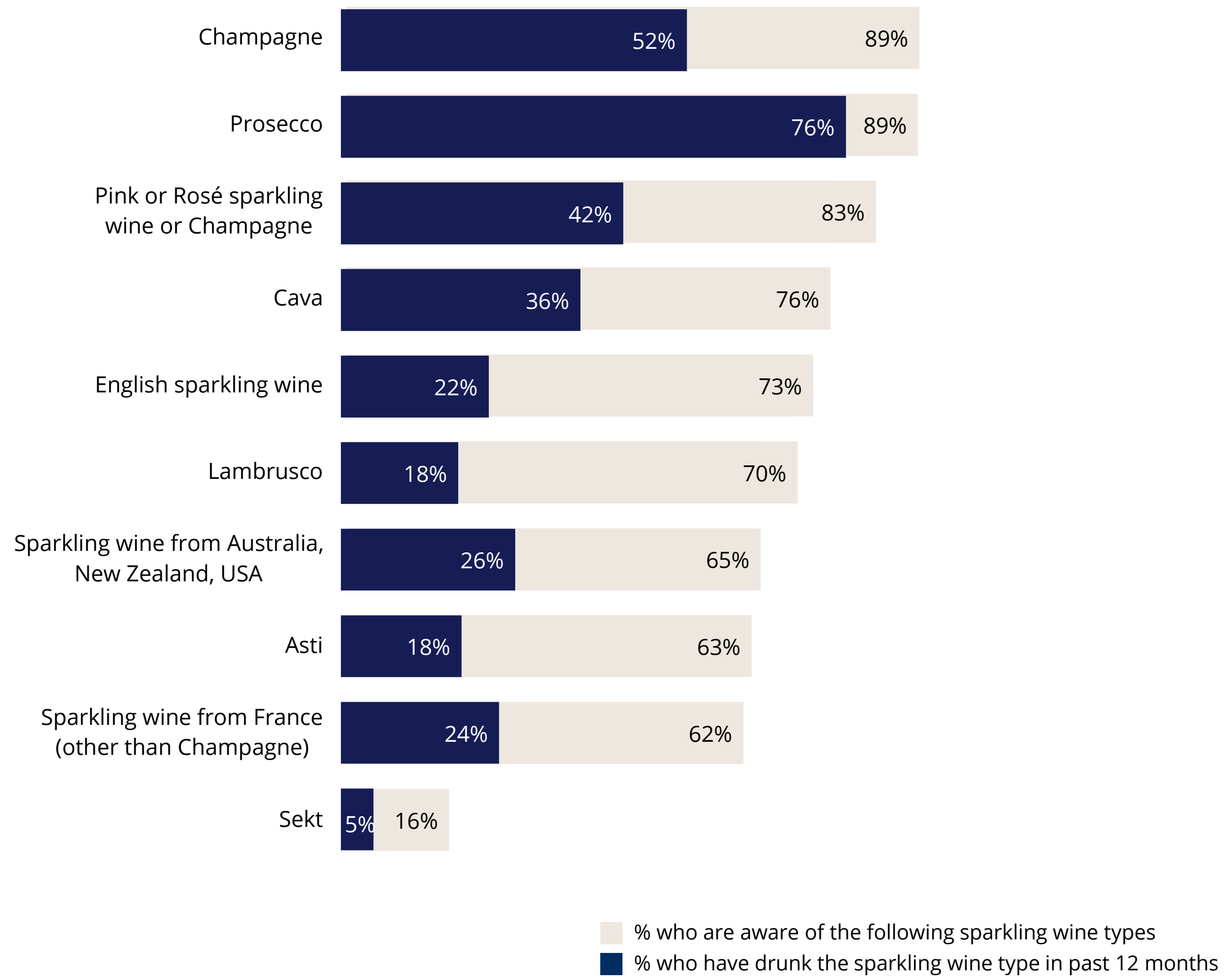
% / %: Statistically significantly higher / lower than all drinkers of sparkling wine at a 95% confidence level
Source: Wine Intelligence, Vinitrac® UK, Jun '23 (n=2,021) drinkers of sparkling wine in the UK

Sparkling wine types consumption and awareness

Prosecco has the joint-highest awareness levels and the highest consumption incidence among sparkling wine drinkers

Sparkling wine types awareness and consumption

% who are aware of the following sparkling wine types and % who have drunk the sparkling wine type in past 12 months
Base = All UK drinkers of sparkling wine (n=2,021)



Source: Wine Intelligence, Vinitrac® UK, Jun '23 (n=2,021) drinkers of sparkling wine in the UK

Sparkling wine type awareness

Breadth of knowledge among sparkling wine drinkers is becoming diluted as new consumers enter the category. This helps to explain significantly lower awareness levels

Sparkling wine awareness: Tracking

% who are aware of the following sparkling wine types
Base = All UK drinkers of sparkling wine (n≥1,010)

	2019 (n=1,010)	2022 (n=2,000)	2023 (n=2,021)	Tracking vs. '19	Tracking vs. '22
Champagne	**95%**	**87%**	**89%**	↓	↑
Prosecco	**94%**	**87%**	**89%**	↓	→
Pink or Rosé sparkling wine or Champagne	**n/a**	**82%**	**83%**	n/a	→
Cava	**84%**	**73%**	**76%**	↓	→
English sparkling wine	**78%**	**68%**	**73%**	↓	↑
Lambrusco	**76%**	**68%**	**70%**	↓	→
Sparkling wine from Australia, New Zealand, USA	**71%**	**62%**	**65%**	↓	→
Asti	**67%**	**60%**	**63%**	↓	↑
Sparkling wine from France (other than Champagne)	**n/a**	**59%**	**62%**	n/a	↑
Sekt	**n/a**	**16%**	**16%**	n/a	→

n/a = tracking unavailable for this wave
↑ / ↓: Statistically significantly higher / lower than the previous wave at a 95% confidence level
Source: Wine Intelligence, Vinitrac® UK, May '19, Jun '22, Jun '23, (n≥1,010) drinkers of sparkling wine in the UK

Sparkling wine type awareness

Older drinkers have more awareness of different sparkling wine types, probably because of their experience of the category

Sparkling wine type awareness, by age and gender

% who are aware of the following sparkling wine types
Base = All UK drinkers of sparkling wine (n=2,021)

	All drinkers of sparkling wine in the UK	Male			Female		
		LDA-34	35-54	55+	LDA-34	35-54	55+
	(n=2,021)	(n=249)	(n=309)	(n=309)	(n=303)	(n=400)	(n=446)
Champagne	89%	82%	85%	96%	85%	90%	95%
Prosecco	89%	74%	84%	97%	84%	90%	98%
Pink or Rosé sparkling wine or Champagne	83%	76%	75%	85%	83%	85%	87%
Cava	76%	49%	70%	92%	54%	80%	94%
English sparkling wine	73%	71%	74%	84%	55%	72%	80%
Lambrusco	70%	42%	69%	92%	38%	75%	91%
Sparkling wine from Australia, New Zealand, USA	65%	58%	66%	74%	52%	63%	72%
Asti	63%	29%	59%	87%	32%	66%	88%
Sparkling wine from France	62%	56%	63%	68%	50%	64%	66%
Sekt	16%	23%	20%	23%	11%	13%	10%

% / %: Statistically significantly higher / lower than all drinkers of sparkling wine at a 95% confidence level
Source: Wine Intelligence, Vinitrac® UK, Jun '23 (n=2,021) drinkers of sparkling wine in the UK

Sparkling wine type consumption

Sparkling wine drinkers are consuming a narrower range than in 2019, with all leading types seeing lower consumption levels. This could indicate that more drinkers are focusing on specific sparkling wine types than a broad range

Sparkling wine consumption: Tracking

% who have drunk the sparkling wine type in past 12 months
Base = All UK drinkers of sparkling wine (n≥1,010)

	2019 (n=2,000)	2022 (n=1,008)	2023 (n=1,043)	Tracking vs. '19	Tracking vs. '22
Prosecco	82%	75%	76%	↓	→
Champagne	60%	51%	52%	↓	→
Pink or Rosé sparkling wine or Champagne	n/a	44%	42%	n/a	→
Cava	44%	35%	36%	↓	→
Sparkling wine from Australia, New Zealand, USA	31%	23%	26%	↓	↑
Sparkling wine from France (other than Champagne)	n/a	22%	24%	n/a	→
English sparkling wine	21%	18%	22%	→	↑
Asti	21%	18%	18%	→	→
Lambrusco	20%	18%	18%	→	→
Sekt	n/a	6%	5%	n/a	→

n/a = tracking unavailable for this wave
↑ / ↓: Statistically significantly higher / lower than the previous wave at a 95% confidence level
Source: Wine Intelligence, Vinitrac® UK, May '19, Jun '22, Jun '23, (n≥1,010) drinkers of sparkling wine in the UK

Sparkling wine type consumption

Younger men have the broadest sparkling wine repertoires; older drinkers tend to consume a narrower variety; young men consume more English sparkling wine than older drinkers

Sparkling wine type consumption, by age and gender

% who have drunk the sparkling wine type in past 12 months
Base = All UK drinkers of sparkling wine (n=2,021)

	All drinkers of sparkling wine in the UK (n=2,021)	Male LDA-34 (n=249)	Male 35-54 (n=309)	Male 55+ (n=309)	Female LDA-34 (n=303)	Female 35-54 (n=400)	Female 55+ (n=446)
Prosecco	76%	63%	73%	77%	72%	82%	82%
Champagne	52%	65%	58%	44%	63%	52%	38%
Pink or Rosé sparkling wine or Champagne	42%	43%	37%	24%	61%	56%	34%
Cava	36%	29%	41%	44%	26%	42%	33%
Sparkling wine from Australia, New Zealand, USA	26%	36%	33%	21%	25%	29%	18%
Sparkling wine from France	24%	38%	29%	19%	23%	25%	15%
English sparkling wine	22%	41%	25%	14%	25%	23%	12%
Asti	18%	16%	20%	23%	12%	22%	15%
Lambrusco	18%	26%	22%	18%	12%	20%	11%
Sekt	5%	12%	9%	2%	4%	5%	0%

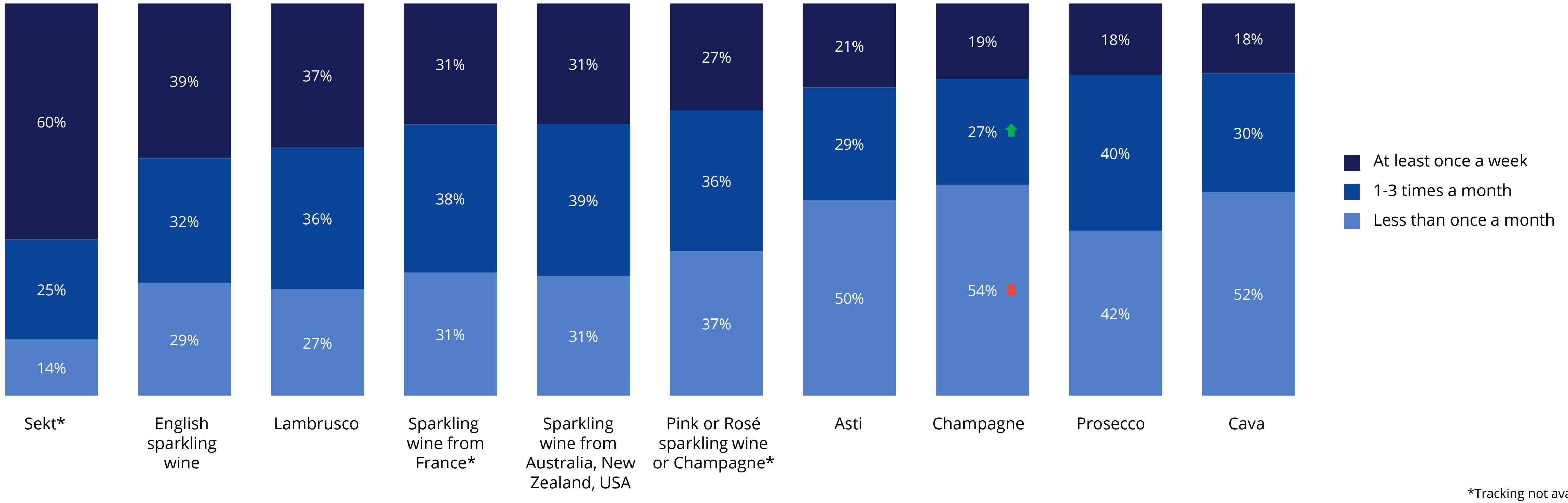
% / %: Statistically significantly higher / lower than all drinkers of sparkling wine at a 95% confidence level
Source: Wine Intelligence, Vinitrac® UK, Jun '23 (n=2,021) drinkers of sparkling wine in the UK

Consumption frequency

Frequency of consumption of all sparkling wine segments has remained broadly the same since 2019, although there has been an increase in monthly consumption of Champagne

Consumption frequency: all sparkling wine types

% who drink the following sparkling wine types at the stated frequencies
Base = Those who have drunk the following sparkling wine types



*Tracking not available

↑/↓: Statistically significantly higher / lower than May '19 at a 95% confidence level

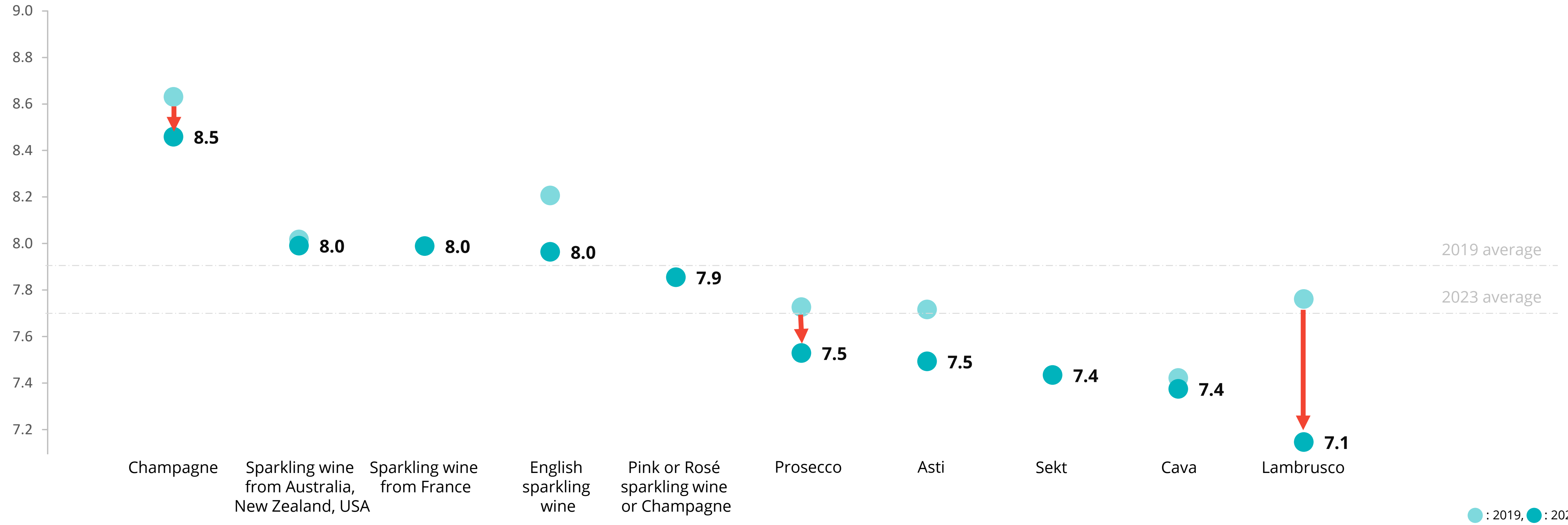
Source: Wine Intelligence, Vinitrac® UK, May '19, Jun '23, (n≥1,010) drinkers of sparkling wine in the UK

Quality perception

Sparkling wine drinkers have significantly reduced perceptions about the quality of Champagne, Prosecco and Lambrusco; English sparkling wine quality is rated on a par with France and the New World

Quality perception: all sparkling wine types

Mean quality perception, participants indicated their view of the quality of the following sparkling wine types on a scale of 0 –10
Base = Those who have drunk the following sparkling wine types



→ / ←: Statistically significantly higher / lower than 2019 at a 95% confidence level

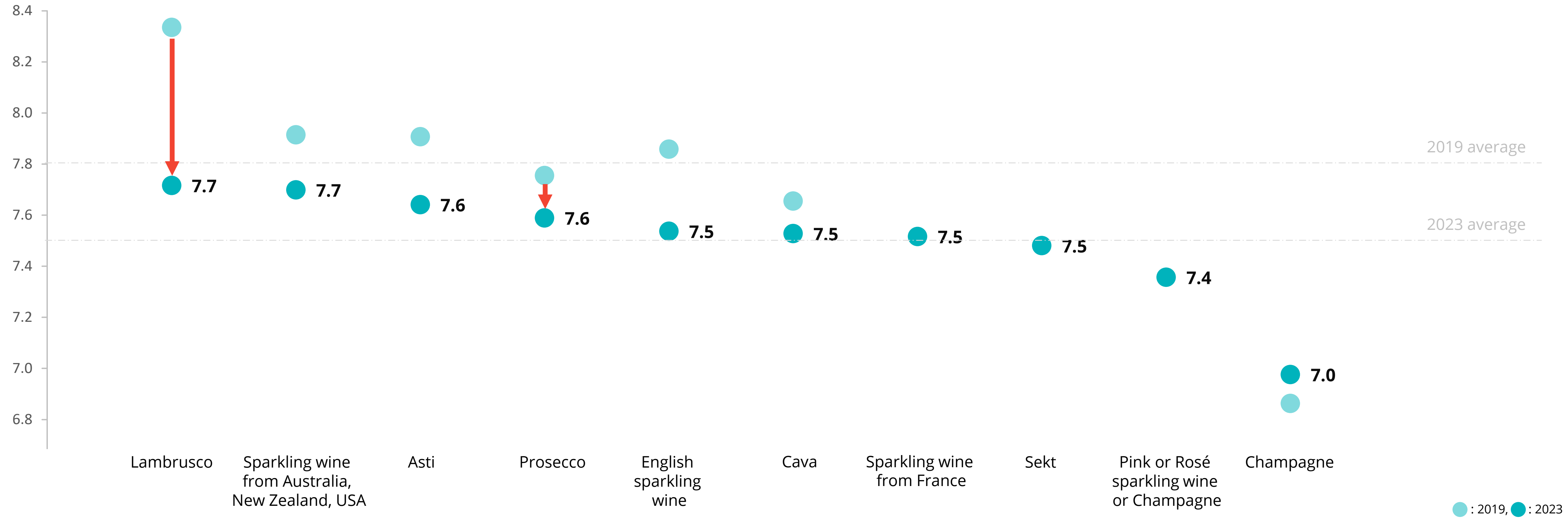
Source: Wine Intelligence, Vinitrac® UK, May '19, Jun '23, (n≥1,010) drinkers of sparkling wine in the UK

Value for money

The perceived value for money of Italian sparkling wine has decreased in the long term; Champagne is recognised as offering the highest quality but is considered the worst value for money

Value for money perception: all sparkling wine types

Mean value for money perception, participants indicated their view of the value for money of the following sparkling wine types on a scale of 0–10
Base = Those who have drunk the following sparkling wine types



→ / ←: Statistically significantly higher / lower than 2019 at a 95% confidence level
Source: Wine Intelligence, Vinitrac® UK, May '19, Jun '23, (n≥1,010) drinkers of sparkling wine in the UK

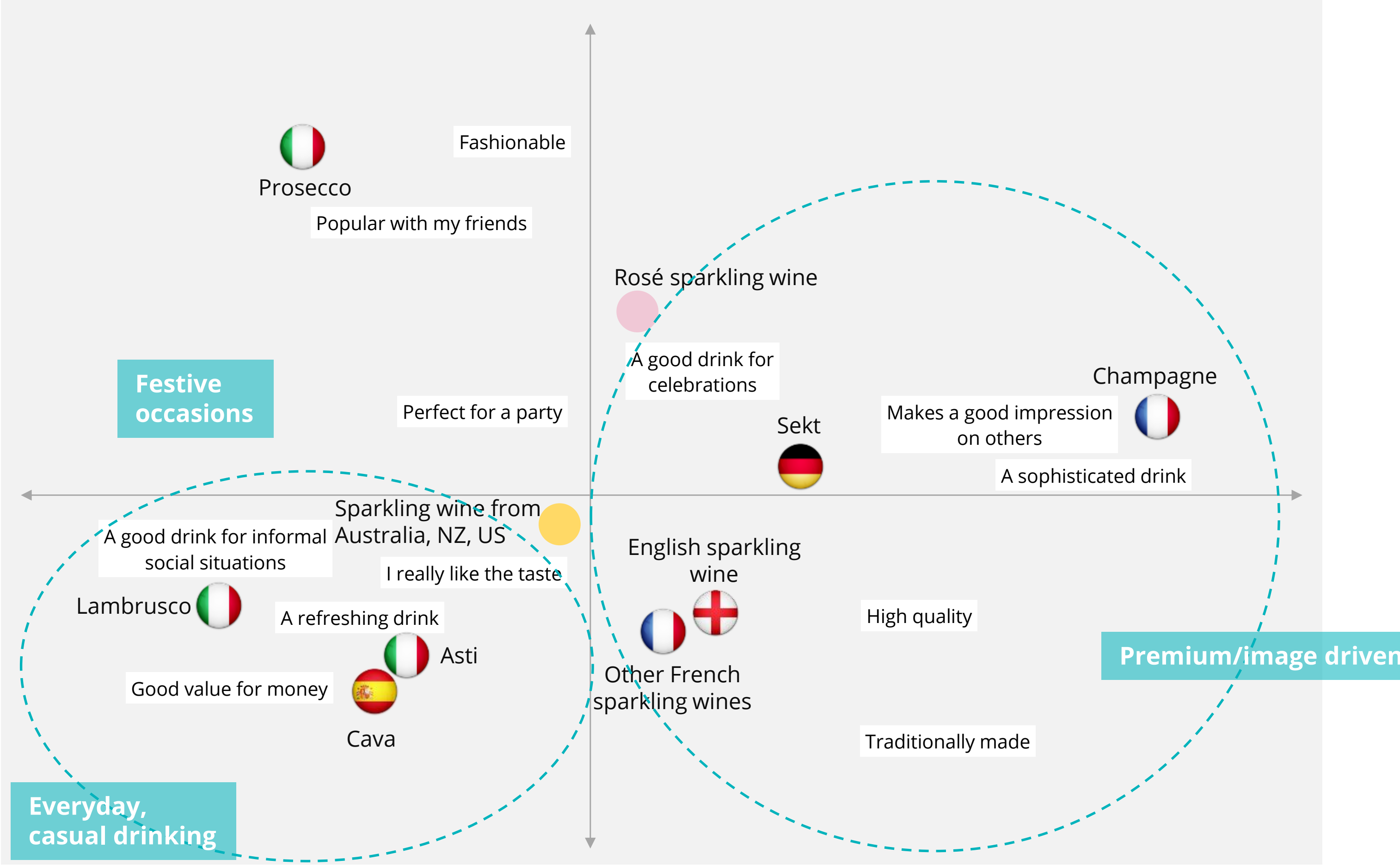
Imagery perception

The positioning map is a graphical representation of the association between sparkling wine types and statements. The strength of the association is measured by how far the sparkling wine types and the statement are from the centre

English and French sparkling wines are closely associated with being high quality and portraying a premium image. Italian and Spanish sparkling wines are closely tied to everyday and casual drinking

Sparkling wine types imagery perception

Base = Those who have drunk the following sparkling wine types



Source: Wine Intelligence, Vinitrac® UK, Jun '23 (n=2,021) drinkers of sparkling wine in the UK

Imagery perception

Champagne and Prosecco score highest overall, outperforming on celebrations; Champagne is also linked with quality, fashion and tradition; almost half of English sparkling wine drinkers see it as high quality

Sparkling wine types imagery perception

Sparkling wine types sorted by level of association; statements sorted by average for all sparkling wine types
% who associate the sparkling wine types with the following statements
Base = Those who have drunk the following sparkling wine types

	Prosecco	Champagne	Pink or Rosé sparkling wine or Champagne	Cava	Sparkling wine from Australia, New Zealand, USA	Sparkling wine from France (other than Champagne)	English sparkling wine	Asti	Lambrusco	Sekt
A good drink for celebrations	53%	61%	47%	42%	39%	36%	38%	36%	30%	37%
I really like the taste	45%	41%	46%	37%	44%	36%	41%	46%	36%	20%
Perfect for a party	55%	38%	41%	42%	36%	33%	34%	41%	36%	33%
A refreshing drink	44%	26%	36%	39%	37%	30%	36%	40%	39%	22%
Good value for money	48%	17%	28%	44%	38%	33%	31%	38%	44%	21%
High quality	27%	56%	35%	27%	35%	34%	45%	26%	23%	26%
A good drink for informal social situations	42%	17%	33%	34%	33%	29%	28%	34%	34%	23%
Popular with my friends	46%	25%	31%	24%	29%	24%	25%	22%	30%	20%
A sophisticated drink	20%	50%	32%	19%	22%	26%	28%	21%	18%	26%
Traditionally made	17%	43%	24%	25%	22%	29%	32%	21%	19%	28%
Fashionable	38%	26%	30%	17%	21%	19%	26%	20%	22%	16%
Makes a good impression on others	18%	40%	24%	12%	21%	23%	24%	15%	18%	21%

Green / turquoise: Statistically significantly higher than 4 or more / 3 sparkling wine types at a 95% confidence level
Source: Wine Intelligence, Vinitrac® UK, Jun '23 (n=2,021) drinkers of sparkling wine in the UK

Purchase Behaviour

Sparkling Wine in the UK Market

2023

Purchase locations

Prosecco and pink sparkling wine are popular in all purchase locations; Cava is the sub-category most frequently bought in the off-trade, with English sparkling wine having a higher purchase incidence in bars or pubs

Sparkling wine types purchase location

% who purchase sparkling wine in the following places
Base = Those who have drunk the following sparkling wine types

	Prosecco	Champagne	Pink or Rosé sparkling wine or Champagne	Cava	Sparkling wine from Australia, New Zealand, USA	Sparkling wine from France	English sparkling wine	Asti	Lambrusco	Sekt
In a shop	79%	70%	75%	81%	74%	67%	53%	74%	68%	51%
In a bar or pub	38%	24%	37%	24%	32%	34%	39%	25%	33%	42%
In a restaurant	42%	38%	45%	32%	40%	45%	42%	26%	35%	42%

Green / turquoise: Statistically significantly higher than 4 or more / 3 sparkling wine types at a 95% confidence level
Source: Wine Intelligence, Vinitrac® UK, Jun '23 (n=2,021) drinkers of sparkling wine in the UK

Buying channels

Supermarkets are the number one place to shop for sparkling wine but are favoured less by younger drinkers; corner shops and supermarket websites are the next preferred channels among this group

Sparkling wine-buying channels: by age and gender

% who have purchased sparkling wine from the following channels in the past six months
Base = All UK drinkers of sparkling wine (n=2,021)

	All drinkers of sparkling wine in the UK	Male			Female		
		LDA-34	35-54	55+	LDA-34	35-54	55+
	(n=2,021)	(n=249)	(n=309)	(n=309)	(n=303)	(n=400)	(n=446)
In a supermarket	72%	52%	69%	82%	64%	76%	81%
In a discount store	28%	27%	25%	24%	34%	31%	26%
From a supermarket website	21%	32%	24%	11%	23%	28%	13%
In a wine shop / off licence chain	17%	25%	17%	14%	25%	19%	8%
In a corner / convenience shop	17%	31%	22%	7%	24%	20%	6%
In an independent wine specialist store	13%	24%	19%	7%	15%	13%	6%
From an online retailer	13%	21%	19%	6%	17%	13%	5%
From Duty Free	11%	20%	11%	8%	15%	10%	6%
From a wine club or membership organisation	9%	15%	13%	6%	10%	9%	3%
From a delivery app	8%	18%	12%	1%	13%	7%	1%
From a winery during a visit	7%	20%	8%	2%	10%	6%	3%
From the wine producer’s cellar	7%	20%	10%	2%	9%	6%	1%
From a winery's website	6%	16%	11%	2%	7%	5%	2%
On cross-channel shopping trips	6%	16%	9%	3%	8%	4%	2%

61% of men aged LDA-34 are **online users,** vs 37% among all sparkling wine drinkers

% / %: Statistically significantly higher / lower than all sparkling wine drinkers at a 95% confidence level
Source: Wine Intelligence, Vinitrac® UK, Jun '23 (n=2,021) drinkers of sparkling wine in the UK

Choice cues

Brand awareness is the leading choice cue; promotional offers are the second biggest driver for most sparkling wine types; recommendations and packaging are more important for English sparkling wine

Sparkling wine choice cues in the off-trade

Sparkling wine types sorted by sample size
% who find the following factors to be the most important factor when buying sparkling wine in the off-trade
Base = Those who have drunk the following sparkling wine types

	Prosecco	Champagne	Pink or Rosé sparkling wine or Champagne	Cava	Sparkling wine from Australia, New Zealand, USA	Sparkling wine from France	English sparkling wine	Asti	Lambrusco	Sekt
A brand I am aware of	27%	31%	27%	26%	24%	23%	20%	30%	23%	12%
Promotional offer	20%	13%	16%	21%	16%	13%	9%	17%	14%	19%
Recommendation by friends or family	13%	10%	11%	10%	14%	13%	15%	9%	12%	11%
Appeal of the bottle and / or label design	8%	9%	10%	7%	8%	10%	11%	8%	7%	9%
Whether the sparkling wine has won a medal or award	5%	8%	5%	7%	8%	10%	8%	6%	6%	12%
Alcohol content	6%	5%	7%	6%	9%	7%	9%	7%	12%	6%
Whether it's suitable for gifting	6%	12%	8%	5%	5%	6%	6%	5%	9%	8%
Recommendation by wine critic or writer	4%	6%	6%	5%	7%	8%	10%	7%	7%	10%
Recommendation by shop staff or shop leaflets	4%	3%	4%	4%	5%	6%	10%	6%	5%	9%

Top 3 choice cues for the sparkling wine type
Green / turquoise: Statistically significantly higher than 4 or more / 3 sparkling wine types at a 95% confidence level
Source: Wine Intelligence, Vinitrac® UK, Jun '23 (n=2,021) drinkers of sparkling wine in the UK

Formats

Greater proportions of male drinkers are purchasing a broader range of packaging formats in both the off-trade and on-trade

Sparkling wine format purchase

% who purchase the following sparkling wine formats in the off-trade/on-trade
Base = Those who purchase in the off-trade / the on-trade

	Those who purchase in the off-trade	Male			Female		
		LDA-34	35-54	55+	LDA-34	35-54	55+
	(n=1,744)	(n=198)	(n=264)	(n=279)	(n=238)	(n=362)	(n=400)
Bottle (750ml)	85%	77%	81%	91%	79%	86%	89%
Single serve bottle	18%	26%	24%	7%	23%	23%	11%
Half bottle (375ml)	15%	35%	20%	8%	21%	11%	5%
Magnum (1.5L)	14%	38%	22%	6%	16%	14%	4%
Single serve can	8%	18%	9%	1%	14%	9%	1%

	Those who purchase in the on-trade	Male			Female		
		LDA-34	35-54	55+	LDA-34	35-54	55+
	(n=1,298)	(n=199)	(n=208)	(n=138)	(n=234)	(n=286)	(n=229)
By the glass	64%	52%	56%	57%	66%	74%	70%
By the bottle (750ml)	51%	60%	58%	57%	44%	49%	45%
By the small bottle (200ml)	13%	26%	18%	5%	9%	12%	7%
By the half bottle (375ml)	13%	28%	20%	1%	13%	9%	5%

% / %: Statistically significantly higher / lower than all sparkling wine drinkers at a 95% confidence level
Source: Wine Intelligence, Vinitrac® UK, Jun '23 (n=2,021) drinkers of sparkling wine in the UK

Formats

There has been a significant fall in the purchase of half-bottles in the on-trade; the popularity of magnums in the off-trade has also waned

Sparkling wine format purchase: tracking

% who purchase the following sparkling wine formats in the off-trade/on-trade
Base = Those who purchase in the off-trade / the on-trade

Those who purchase in the off-trade	2019 (n=868)	2022 (n=1,670)	2023 (n=1,744)	Tracking vs. '19	Tracking vs. '22
Bottle (750ml)	83%	81%	85%	→	↑
Single serve bottle	19%	15%	18%	→	↑
Half bottle (375ml)	15%	15%	15%	→	→
Magnum (1.5L)	18%	14%	14%	↓	→
Single serve can	7%	7%	8%	→	→

Those who purchase in the on-trade	2019 (n=614)	2022 (n=1,268)	2023 (n=1,298)	Tracking vs. '19	Tracking vs. '22
By the glass	68%	58%	64%	→	↑
By the bottle (750ml)	52%	49%	51%	→	→
By the small bottle (200ml)	10%	12%	13%	→	→
By the half bottle (375ml)	18%	18%	13%	↓	↓

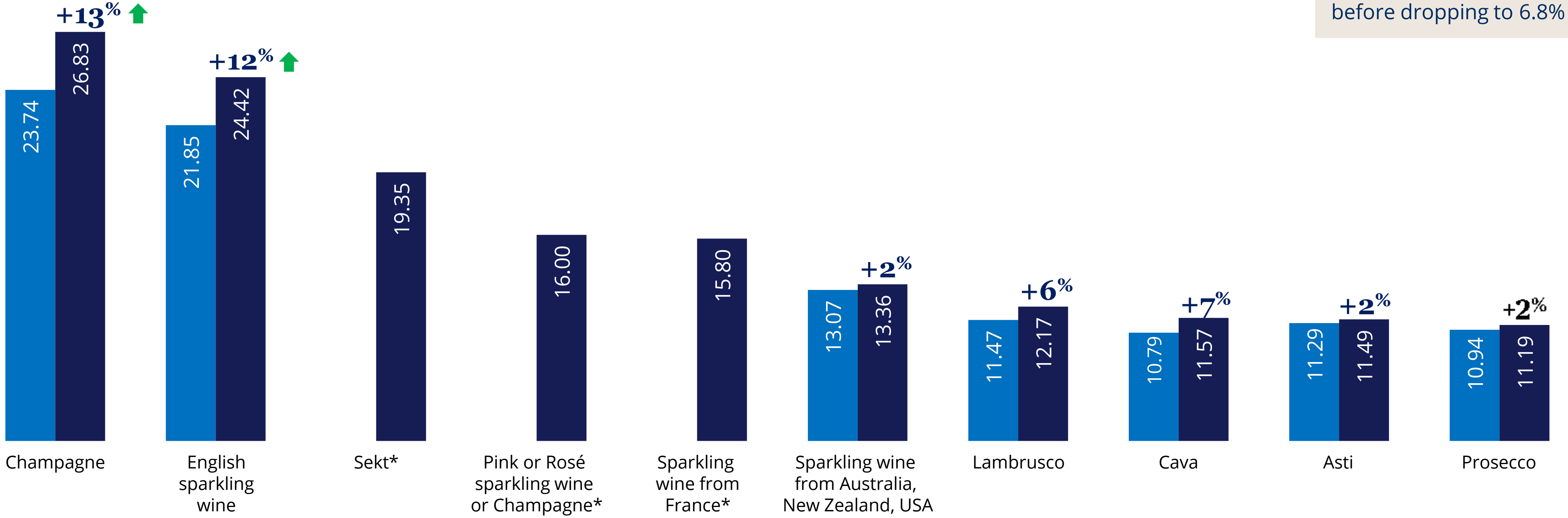
↑/↓: Statistically significantly higher / lower than May '19 at a 95% confidence level
Source: Wine Intelligence, Vinitrac® UK, May '19, Jun '23, (n≥1,010) drinkers of sparkling wine in the UK

Typical spend

The typical spend on a bottle of sparkling wine has increased by 10%, with the largest increases in Champagne and English sparkling wine

Typical spend in the off-trade by the bottle

Mean typical spend, expressed in local currency (GB Pounds)
Base = Those who have purchased the following sparkling wine types in the off-trade



Economic context: In recent years, the UK experienced its highest inflation in the 21st century, reaching 9.1% in 2022, before dropping to 6.8% in 2023.

*Tracking not available

↑/↓: Statistically significantly higher / lower than May '19 at a 95% confidence level

Source: Wine Intelligence, Vinitrac® UK, May '19, Jun '23, (n≥1,010) drinkers of sparkling wine in the UK
International Monetary Fund (IMF), World Economic Outlook, 2023

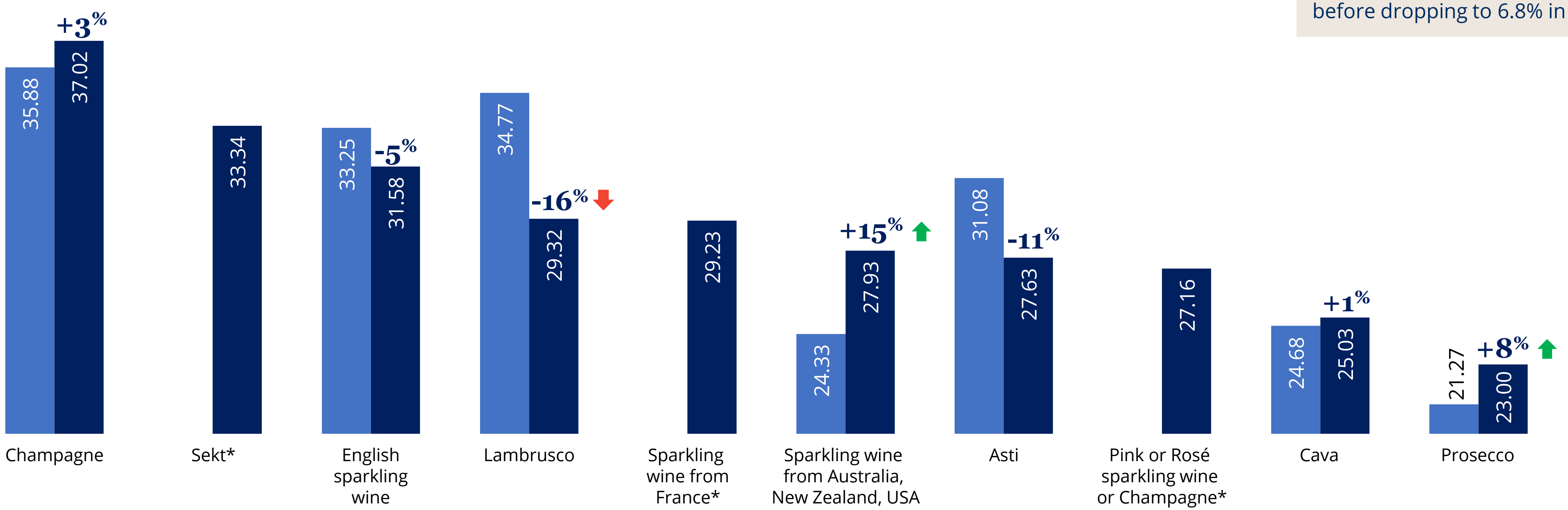
Typical spend

The typical spend on a bottle in the on-trade has remained broadly stable since 2019; Lambrusco experienced a significant drop in typical spend which could be linked to its lower quality perception

Typical spend in the on-trade by the bottle

Mean typical spend, expressed in local currency (GB Pounds)
Base = Those who have purchased the following sparkling wine types in the on-trade

Economic context: In recent years, the UK experienced its highest inflation in the 21st century, reaching 9.1% in 2022, before dropping to 6.8% in 2023.



*Tracking not available
⬆/⬇: Statistically significantly higher / lower than May '19 at a 95% confidence level
Source: Wine Intelligence, Vinitrac® UK, May '19, Jun '23, (n≥1,010) drinkers of sparkling wine in the UK
International Monetary Fund (IMF), World Economic Outlook, 2023

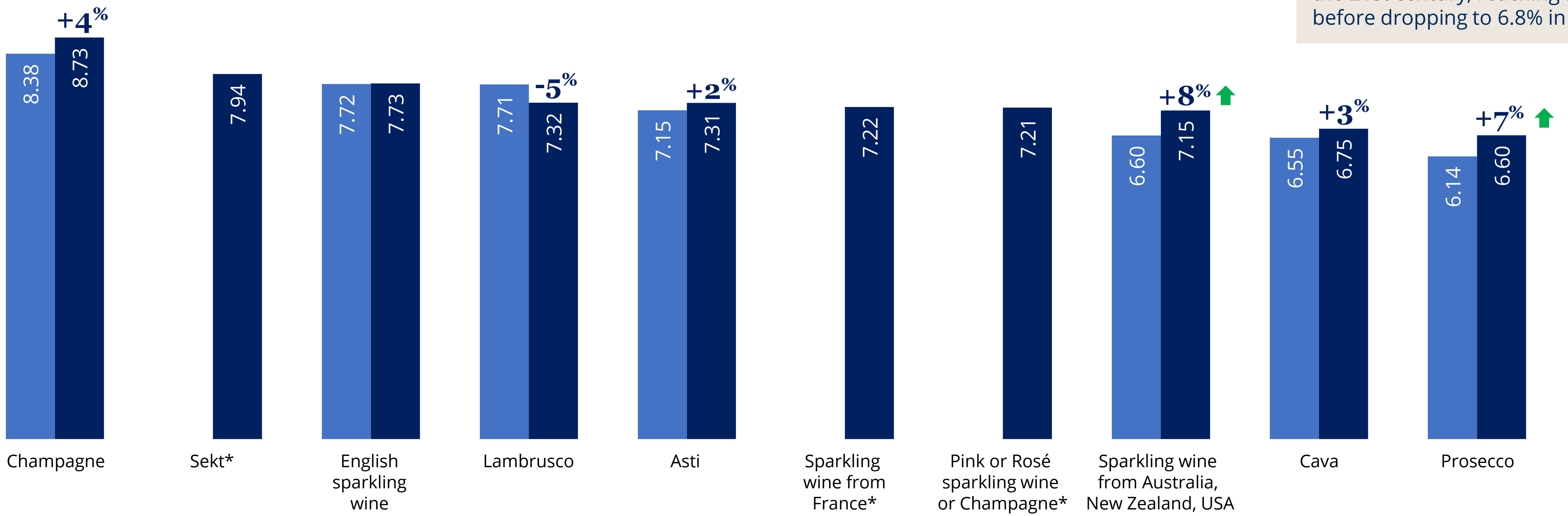
Typical spend

Spending by the glass in the on-trade is broadly the same as in 2019

Typical spend in the on-trade by the glass

Mean typical spend, expressed in local currency (GB Pounds)
Base = Those who have purchased the following sparkling wine types in the on-trade

Economic context: In recent years, the UK experienced its highest inflation in the 21st century, reaching 9.1% in 2022, before dropping to 6.8% in 2023.



*Tracking not available
↑/↓: Statistically significantly higher / lower than May '19 at a 95% confidence level
Source: Wine Intelligence, Vinitrac® UK, May '19, Jun '23, (n≥1,010) drinkers of sparkling wine in the UK
International Monetary Fund (IMF), World Economic Outlook, 2023

Attitudes and Involvement

Sparkling Wine in the UK Market

2023

Attitudes towards sparkling wine

UK sparkling wine drinkers are more rigid in their choice than in 2019, which is especially the case among middle-aged consumers

Attitudes towards sparkling wine: Tracking

% who have selected the following statements to be applicable to them
Base = All UK drinkers of sparkling wine (n≥1,010)

	2019 (n=1,010)	2022 (n=2,000)	2023 (n=2,021)	Tracking vs. '19	Tracking vs. '22
I enjoy trying new and different styles of sparkling wine on a regular basis	**34%**	**31%**	**33%**	➡	➡
I don't mind what sparkling wine I buy so long as the price is right	**30%**	**30%**	**25%**	⬇	⬇
I know what sparkling wine I like and I tend to stick to what I know	**37%**	**39%**	**41%**	⬆	➡

Attitudes towards sparkling wine, by age and gender

% who have selected the following statements to be applicable to them
Base = All UK drinkers of sparkling wine (n=2,021)

	All drinkers of sparkling wine in the UK	Male			Female		
		LDA-34	35-54	55+	LDA-34	35-54	55+
	(n=2,021)	(n=249)	(n=309)	(n=309)	(n=303)	(n=400)	(n=446)
I enjoy trying new and different styles of sparkling wine on a regular basis	**33%**	**49%**	**39%**	**23%**	**43%**	**33%**	**23%**
I don't mind what sparkling wine I buy so long as the price is right	**25%**	**15%**	**22%**	**28%**	**24%**	**27%**	**30%**
I know what sparkling wine I like and I tend to stick to what I know	**41%**	**35%**	**39%**	**49%**	**33%**	**40%**	**47%**

⬆ / ⬇: Statistically significantly higher / lower than the previous wave at a 95% confidence level
% / %: Statistically significantly higher / lower than all sparkling wine drinkers at a 95% confidence level
Source: Wine Intelligence, Vinitrac® UK, May '19, Jun '22, Jun '23, (n≥1,010) drinkers of sparkling wine in the UK

Involvement, value and expertise

There has been noticeable growth in enthusiasm for sparkling wine; combined with increasingly rigid selection, this could indicate that drinkers are passionate about their favourite wines but unlikely to venture beyond them

Sparkling wine involvement, value and expertise: Tracking

% who 'agree' or 'strongly agree' with the following statements
Base = All UK drinkers of sparkling wine (n≥1,010)

Ranking '23		2019 (n=1,010)	2022 (n=2,000)	2023 (n=2,021)	Tracking vs. '19	Tracking vs. '22
1	Drinking sparkling wine gives me pleasure	76%	74%	80%	↑	↑
2	I always look for the best quality sparkling wines I can get for my budget	71%	72%	74%	→	→
3	I like to take my time when I purchase a bottle of sparkling wine	55%	58%	60%	↑	→
4	Deciding which sparkling wine to buy is an important decision	53%	57%	59%	↑	→
5	Generally speaking, sparkling wine is an expensive drink	48%	54%	50%	→	↓
6	I have a strong interest in sparkling wine	37%	41%	42%	↑	→
7	I feel competent about my knowledge of sparkling wine	37%	39%	40%	→	→
8	Sparkling wine is important to me in my lifestyle	34%	38%	39%	↑	→

↑ / ↓: Statistically significantly higher / lower than the previous wave at a 95% confidence level
Source: Wine Intelligence, Vinitrac® UK, May '19, Jun '22, Jun '23, (n≥1,010) drinkers of sparkling wine in the UK

Involvement, value and expertise

LDA men under 35 seem to be the most involved with the sparkling wine category, with greater numbers in this group saying they have a strong interest in the category and that it is important to their lifestyle

Sparkling wine involvement, value and expertise, by age and gender

% who 'agree' or 'strongly agree' with the following statements
Base = All UK drinkers of sparkling wine (n=2,021)

	All drinkers of sparkling wine in the UK	Male			Female		
		LDA-34	35-54	55+	LDA-34	35-54	55+
	(n=2,021)	(n=249)	(n=309)	(n=309)	(n=303)	(n=400)	(n=446)
Drinking sparkling wine gives me pleasure	80%	74%	81%	81%	76%	81%	83%
I always look for the best quality sparkling wines I can get for my budget	74%	76%	72%	74%	74%	77%	71%
I like to take my time when I purchase a bottle of sparkling wine	60%	67%	67%	58%	59%	60%	54%
Deciding which sparkling wine to buy is an important decision	59%	68%	61%	57%	59%	60%	51%
Generally speaking, sparkling wine is an expensive drink	50%	62%	52%	47%	49%	52%	45%
I have a strong interest in sparkling wine	42%	65%	51%	31%	49%	46%	24%
I feel competent about my knowledge of sparkling wine	40%	63%	50%	31%	44%	42%	24%
Sparkling wine is important to me in my lifestyle	39%	55%	48%	25%	40%	46%	26%

% / %: Statistically significantly higher / lower than all sparkling wine drinkers at a 95% confidence level
Source: Wine Intelligence, Vinitrac® UK, Jun '23 (n=2,021) drinkers of sparkling wine in the UK

Brand Health

Sparkling Wine in the UK Market

2023

Wine Brand Power Index

Brand health measures included in the index

Awareness	% who have heard of each brand (when prompted with a list of brand names with logos) Base = All wine drinkers	**Brand awareness index**
Purchase	% who have bought each brand in the past 3 months Base = All wine drinkers	**Brand purchase index**
Conversion	% who have bought each brand in the past 3 months Base = Those who have heard of each brand	
Consideration	% who would consider buying each brand Base = Those who have heard of each brand	
Affinity	% who think each brand is right for people like them Base = Those who have heard of each brand	**Brand connection index**
Recommendation	% who would recommend each brand to a friend Base = Those who have heard of each brand	

Wine Brand Power Index

Sparkling wine Brand Power Index UK 2023

BLOSSOM HILL.

1st

PLAZA CENTRO Prosecco

2nd

Freixenet

3rd

Sparkling wine Brand Power Index 2023

Freixenet has become one of the top three most powerful sparkling wine brands in the UK market due to a higher purchase incidence among drinkers

Ranking '23		Final Index	Tracking vs 2022	Score difference vs 2022
1	Blossom Hill	90.8	=	-1.4
2	Plaza Centro	87.0	=	1.5
3	Freixenet	86.5	↑+1	4.6
4	Fillipo Sansovino	83.4	↑+2	4.6
5	Yellow Tail	81.7	↓-2	-3.0
6	Jacob's Creek	80.5	↑+1	4.7
7	Moët & Chandon	80.4	↓-2	-0.7
8	Martini	77.2	=	3.6
9	Hardys	66.1	=	1.2
10	Lanson	65.4	=	2.0
11	i heart Wines	62.8	=	1.3
12	Dom Pérignon	61.9	↓-1	-0.8
13	Bollinger	61.8	↑+1	1.2
14	Veuve Clicquot	61.7	↑+1	1.6
15	Canti	59.4	↑+2	5.5

Ranking '23		Final Index	Tracking vs 2022	Score difference vs 2022
16	Oyster Bay	58.6	↓-4	-3.3
17	Wolf Blass	57.3	↓-1	-0.3
18	Chapel Down	54.7	↑+4	4.7
19	Taittinger	54.3	↑+1	3.4
20	Laurent Perrier	54.2	↓-1	2.3
21	Bella Cucina	52.0	↓-3	0.0
22	Kylie Minogue	51.5	↑+1	2.0
23	Barefoot Bubbly	47.4	↓-2	-2.7
24	Nyetimber	47.1	↑+4	4.1
25	GH Mumm	46.6	↓-1	-2.9
26	Sorso	45.7	↓-1	-0.9
27	Nicolas Feuillatte	45.5	↑+5	4.8
28	Piper Heidsieck	44.7	↓-2	-0.2
29=	Most Wanted	44.4	n/a	n/a
29=	Henkell	44.4	=	3.2

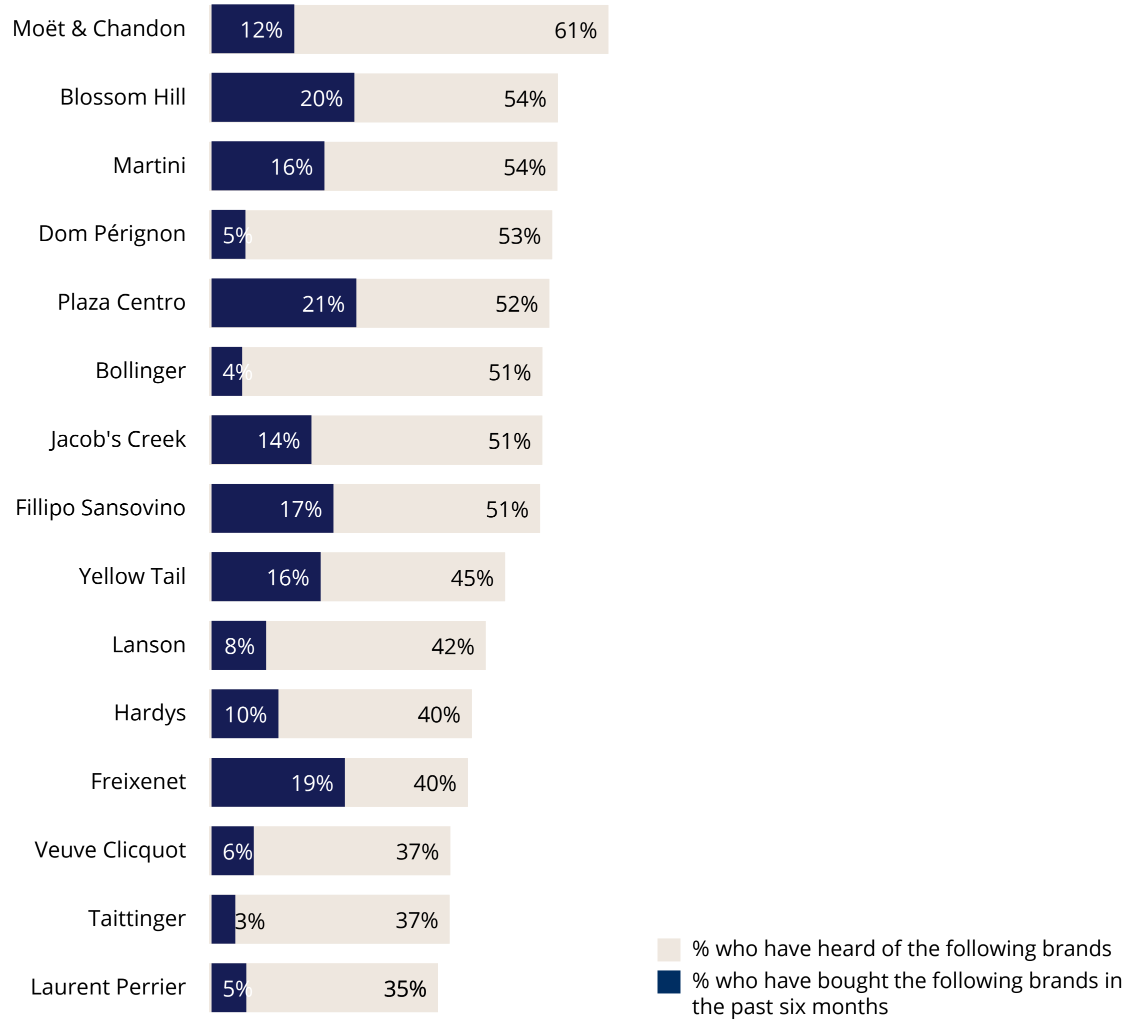
= Represents equal rankings
↑ / ↓: Ranking higher / lower than the previous wave at a 95% confidence level
Source: Wine Intelligence, Vinitrac® UK, Jun '22, Jun '23, (n≥2,000) drinkers of sparkling wine in the UK

Sparkling wine brands consumption and awareness

There is the lack of a strong correlation between awareness and consumption of sparkling wine brands among drinkers

Top 15 brands

% who have heard of the following brands and % who have bought the them in past six months
Base = All UK drinkers of sparkling wine (n=2,021)



Source: Wine Intelligence, Vinitrac® UK, Jun '23 (n=2,021) drinkers of sparkling wine in the UK

Sparkling wine brand awareness

Awareness of brands has declined, probably because of the increased size of the sparkling wine drinking population, as less experienced consumers enter the category

Brand awareness: Top 30

% who have heard of the following brands
Base = All UK drinkers of sparkling wine (n≥1,010)

Ranking '23		2019 (n=1,010)	2022 (n=2,000)	2023 (n=2,021)	Tracking vs. '19	Tracking vs. '22
1	Moët & Chandon	71%	61%	61%	↓	→
2=	Blossom Hill	58%	54%	54%	↓	→
2=	Martini	59%	50%	54%	↓	↑
4	Dom Pérignon	59%	50%	53%	↓	→
5	Plaza Centro	57%	51%	52%	↓	→
6=	Bollinger	56%	50%	51%	↓	→
6=	Jacob's Creek	56%	47%	51%	↓	↑
6=	Fillipo Sansovino	54%	49%	51%	→	→
9	Yellow Tail	40%	45%	45%	↑	→
10	Lanson	50%	42%	42%	↓	→
11=	Hardys	46%	41%	40%	↓	→
11=	Freixenet	34%	37%	40%	↑	↑
13=	Veuve Clicquot	37%	34%	37%	→	↑
13=	Taittinger	39%	34%	37%	→	↑
15	Laurent Perrier	41%	32%	35%	↓	↑

Ranking '23		2019 (n=1,010)	2022 (n=2,000)	2023 (n=2,021)	Tracking vs. '19	Tracking vs. '22
16	Canti	31%	30%	32%	→	→
17	Oyster Bay	29%	29%	31%	→	→
18=	Krug	35%	28%	28%	↓	→
18=	Wolf Blass	30%	29%	28%	→	→
20=	Piper Heidsieck	27%	22%	23%	↓	→
20=	GH Mumm	29%	23%	23%	↓	→
22	Perrier Jouet	24%	21%	21%	→	→
23	i heart Wines	n/a	17%	19%	n/a	→
24=	Nosecco Alcohol Free	n/a	16%	17%	n/a	→
24=	Heidsieck Co Monopole	18%	17%	17%	→	→
24=	Barefoot Bubbly	19%	18%	17%	→	→
24=	Chapel Down	15%	15%	17%	→	→
28	Kylie Minogue	n/a	10%	16%	n/a	↑
29	Nicolas Feuillatte	13%	14%	15%	→	→
30	Bella Cucina	n/a	15%	14%	n/a	→

Results for all brands tested available in the data table

n/a = tracking unavailable for this wave
= Represents equal rankings
↑/↓: Statistically significantly higher / lower than the previous wave at a 95% confidence level
Source: Wine Intelligence, Vinitrac® UK, May '19, Jun '22, Jun '23, (n≥1,010) drinkers of sparkling wine in the UK

Sparkling wine brand purchase

Freixenet is enjoying significantly higher purchase rates among sparkling wine drinkers than in both 2019 and 2022

Brand purchase: Top 30

% who have bought the following brands in the past six months
Base = All UK drinkers of sparkling wine (n≥1,010)

Ranking '23		2019 (n=1,010)	2022 (n=2,000)	2023 (n=2,021)	Tracking vs. '19	Tracking vs. '22
1	Plaza Centro	22%	20%	21%	→	→
2	Blossom Hill	22%	23%	20%	→	→
3	Freixenet	13%	17%	19%	↑	↑
4	Fillipo Sansovino	17%	16%	17%	→	→
5=	Martini	16%	15%	16%	→	→
5=	Yellow Tail	14%	18%	16%	→	↓
7	Jacob's Creek	17%	13%	14%	↓	→
8	Moët & Chandon	15%	12%	12%	↓	→
9	Hardys	12%	9%	10%	↓	→
10	Canti	9%	8%	9%	→	→
11=	i heart Wines	n/a	7%	8%	n/a	→
11=	Lanson	10%	8%	8%	↓	→
13=	Oyster Bay	7%	7%	6%	→	→
13=	Veuve Clicquot	7%	5%	6%	→	→
15=	Bella Cucina	n/a	5%	5%	n/a	→
15=	Wolf Blass	6%	6%	5%	→	→
15=	Laurent Perrier	4%	3%	5%	→	↑
15=	Dom Pérignon	6%	5%	5%	→	→
15=	Chapel Down	4%	4%	5%	→	→
15=	Nosecco Alcohol Free	n/a	4%	5%	n/a	→
21=	Kylie Minogue	n/a	3%	4%	n/a	→
21=	Bollinger	5%	5%	4%	→	→
21=	Henkell	2%	3%	4%	↑	→
21=	Most Wanted	n/a	n/a	4%	n/a	n/a
21=	Barefoot Bubbly	5%	4%	4%	↓	→
26=	Taittinger	5%	3%	3%	↓	→
26=	GH Mumm	5%	4%	3%	↓	→
26=	Piper Heidsieck	5%	2%	3%	↓	→
26=	Mondelli	n/a	3%	3%	n/a	→
26=	Sorso	n/a	3%	3%	n/a	→

Results for all brands tested available in the data table

n/a = tracking unavailable for this wave
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↑ / ↓: Statistically significantly higher / lower than the previous wave at a 95% confidence level
Source: Wine Intelligence, Vinitrac® UK, May '19, Jun '22, Jun '23, (n≥1,010) drinkers of sparkling wine in the UK

Sparkling wine brand conversion

With its higher purchase rate, Freixenet is the clear market leader for conversion

Brand conversion: Top 30

% who have bought the following brands in the past six months
Base = Those who have heard of each brand

Ranking '23		2019 (n=1,010)	2022 (n=2,000)	2023 (n=2,021)	Tracking vs. '19	Tracking vs. '22
1	Freixenet	39%	45%	48%	↑	→
2	i heart Wines	n/a	41%	41%	n/a	→
3	Plaza Centro	39%	39%	39%	→	→
4=	Bella Cucina	n/a	35%	38%	n/a	→
4=	Blossom Hill	38%	42%	38%	→	→
6=	Yellow Tail	36%	40%	34%	→	↓
6=	Fillipo Sansovino	32%	32%	34%	→	→
8	Sorso	n/a	39%	33%	n/a	→
9	Most Wanted	n/a	n/a	32%	n/a	n/a
10=	Henkell	17%	28%	31%	↑	→
10=	Val D'Oca	n/a	26%	31%	n/a	→
12	Martini	27%	29%	30%	→	→
13=	Corvezzo	n/a	21%	29%	n/a	→
13=	Gusbourne	25%	26%	29%	→	→
15=	Canti	30%	25%	28%	→	→

Ranking '23		2019 (n=1,010)	2022 (n=2,000)	2023 (n=2,021)	Tracking vs. '19	Tracking vs. '22
15=	Jacob's Creek	31%	28%	28%	→	→
15=	Kylie Minogue	n/a	32%	28%	n/a	→
18	Chapel Down	27%	28%	27%	→	→
19=	Nosecco Alcohol Free	n/a	26%	26%	n/a	→
19=	La Marca	27%	22%	26%	→	→
21=	Nyetimber	25%	22%	25%	→	→
21=	Rathfinny	30%	13%	25%	→	↑
23=	La Gioiosa	n/a	21%	24%	n/a	→
23=	Valdo	31%	19%	24%	→	→
23=	Hardys	27%	22%	24%	→	→
26	Borgo Molino	n/a	17%	23%	n/a	→
27=	Camel Valley	24%	23%	22%	→	→
27=	Graham Beck	n/a	n/a	22%	n/a	n/a
27=	Zonin	20%	20%	22%	→	→
30	Tosti	n/a	21%	21%	n/a	→

Results for all brands tested available in the data table

n/a = tracking unavailable for this wave
= Represents equal rankings
↑/↓: Statistically significantly higher / lower than the previous wave at a 95% confidence level
Source: Wine Intelligence, Vinitrac® UK, May '19, Jun '22, Jun '23, (n≥1,010) drinkers of sparkling wine in the UK

Sparkling wine brand consideration

Consideration for brands is broadly the same as in 2019

Brand consideration: Top 30

% who would consider buying the following brands
Base = Those who have heard of each brand

Ranking '23		2019 (n=1,010)	2022 (n=2,000)	2023 (n=2,021)	Tracking vs. '19	Tracking vs. '22
1	Freixenet	67%	67%	67%	→	→
2	i heart Wines	n/a	63%	65%	n/a	→
3	Yellow Tail	66%	64%	64%	→	→
4=	Blossom Hill	65%	64%	62%	→	→
4=	Jacob's Creek	64%	61%	62%	→	→
4=	Wolf Blass	60%	57%	62%	→	→
7	Fillipo Sansovino	62%	59%	61%	→	→
8=	Chapel Down	59%	57%	60%	→	→
8=	Plaza Centro	61%	59%	60%	→	→
10	Kylie Minogue	n/a	58%	59%	n/a	→
11	Most Wanted	n/a	n/a	58%	n/a	n/a
12=	Moët & Chandon	58%	57%	57%	→	→
12=	Oyster Bay	64%	59%	57%	↓	→
12=	Veuve Clicquot	58%	57%	57%	→	→
12=	Lanson	60%	53%	57%	→	→

Ranking '23		2019 (n=1,010)	2022 (n=2,000)	2023 (n=2,021)	Tracking vs. '19	Tracking vs. '22
12=	Nicolas Feuillatte	53%	49%	57%	→	→
17=	Bella Cucina	n/a	56%	56%	n/a	→
17=	Hardys	59%	54%	56%	→	→
19=	Sorso	n/a	52%	54%	n/a	→
19=	Canti	55%	47%	54%	→	↑
19=	Nyetimber	51%	51%	54%	→	→
22=	Gusbourne	61%	49%	53%	→	→
22=	Bolney	n/a	55%	53%	n/a	→
22=	Taittinger	53%	49%	53%	→	→
25=	Laurent Perrier	53%	51%	52%	→	→
25=	Barefoot Bubbly	61%	57%	52%	↓	→
27=	Corvezzo	n/a	44%	51%	n/a	→
27=	Louis Roederer Cristal	49%	49%	51%	→	→
27=	Marques de Monistrol	44%	39%	51%	→	↑
27=	Piper Heidsieck	55%	51%	51%	→	→

Results for all brands tested available in the data table

n/a = tracking unavailable for this wave
= Represents equal rankings
↑ / ↓: Statistically significantly higher / lower than the previous wave at a 95% confidence level
Source: Wine Intelligence, Vinitrac® UK, May '19, Jun '22, Jun '23, (n≥1,010) drinkers of sparkling wine in the UK

Sparkling wine brand affinity

Nyetimber has experienced a significant increase in affinity of 13%, which could mean that it experiences better performances on other brand health metrics soon

Brand affinity: Top 30

% who think the following brands are right for people like them
Base = Those who have heard of each brand

Ranking '23		2019 (n=1,010)	2022 (n=2,000)	2023 (n=2,021)	Tracking vs. '19	Tracking vs. '22
1	Freixenet	54%	58%	59%	→	→
2	Blossom Hill	58%	55%	56%	→	→
3	i heart Wines	n/a	56%	55%	n/a	→
4	Yellow Tail	56%	55%	54%	→	→
5	Chapel Down	46%	42%	52%	→	↑
6=	Nyetimber	38%	42%	51%	↑	→
6=	Plaza Centro	51%	51%	51%	→	→
8	Fillipo Sansovino	50%	47%	50%	→	→
9	Jacob's Creek	56%	48%	49%	↓	→
10	Bella Cucina	n/a	45%	48%	n/a	→
11=	Kylie Minogue	n/a	52%	47%	n/a	→
11=	Sorso	n/a	48%	47%	n/a	→
13	Wolf Blass	46%	44%	45%	→	→
14=	Oyster Bay	50%	48%	44%	→	→
14=	Barefoot Bubbly	53%	44%	44%	→	→

Ranking '23		2019 (n=1,010)	2022 (n=2,000)	2023 (n=2,021)	Tracking vs. '19	Tracking vs. '22
14=	Hardys	41%	42%	44%	→	→
17	Most Wanted	n/a	n/a	42%	n/a	n/a
18=	Nicolas Feuillatte	38%	36%	41%	→	→
18=	Veuve Clicquot	47%	44%	41%	↓	→
18=	Moët & Chandon	45%	41%	41%	→	→
18=	Martini	37%	40%	41%	→	→
18=	Lanson	40%	38%	41%	→	→
23=	Henkell	33%	37%	40%	→	→
23=	Canti	40%	36%	40%	→	→
25=	Gusbourne	39%	27%	38%	→	→
25=	GH Mumm	37%	39%	38%	→	→
27=	Maschio	36%	33%	37%	→	→
27=	Val D'Oca	n/a	29%	37%	n/a	→
27=	Codorníu	38%	34%	37%	→	→
30=	Mondelli	n/a	29%	36%	n/a	→

Results for all brands tested available in the data table

n/a = tracking unavailable for this wave
= Represents equal rankings
↑ / ↓: Statistically significantly higher / lower than the previous wave at a 95% confidence level
Source: Wine Intelligence, Vinitrac® UK, May '19, Jun '22, Jun '23, (n≥1,010) drinkers of sparkling wine in the UK

Sparkling wine brand recommendation

Nyetimber has a significantly higher recommendation incidence, with four in 10 of those who have heard of the brand saying they would recommend it

Brand recommendation: Top 30

% who would recommend the following brands to a friend
Base = Those who have heard of each brand

Ranking '23		2019 (n=1,010)	2022 (n=2,000)	2023 (n=2,021)	Tracking vs. '19	Tracking vs. '22
1	Freixenet	47%	52%	53%	→	→
2	i heart Wines	n/a	46%	47%	n/a	→
3	Blossom Hill	47%	44%	46%	→	→
4	Yellow Tail	45%	46%	44%	→	→
5	Nyetimber	31%	44%	43%	↑	→
6	Moët & Chandon	45%	43%	42%	→	→
7=	Chapel Down	39%	42%	41%	→	→
7=	Fillipo Sansovino	43%	39%	41%	→	→
7=	Jacob's Creek	43%	37%	41%	→	→
7=	Plaza Centro	44%	41%	41%	→	→
7=	Veuve Clicquot	44%	41%	41%	→	→
12=	Sorso	n/a	41%	40%	n/a	→
12=	Gusbourne	38%	30%	40%	→	→
14=	Bella Cucina	n/a	39%	38%	n/a	→
14=	Lanson	39%	36%	38%	→	→

Ranking '23		2019 (n=1,010)	2022 (n=2,000)	2023 (n=2,021)	Tracking vs. '19	Tracking vs. '22
14=	Kylie Minogue	n/a	38%	38%	n/a	→
17=	Henkell	27%	32%	36%	→	→
17=	Nicolas Feuillatte	38%	31%	36%	→	→
17=	Val D'Oca	n/a	35%	36%	n/a	→
17=	Martini	33%	35%	36%	→	→
21	Hardys	37%	34%	35%	→	→
22=	Dom Pérignon	35%	35%	34%	→	→
22=	Wolf Blass	37%	36%	34%	→	→
22=	Oyster Bay	42%	41%	34%	↓	↓
22=	Barefoot Bubbly	43%	34%	34%	↓	→
26=	Louis Roederer Cristal	30%	36%	33%	→	→
26=	La Gioiosa	n/a	28%	33%	n/a	→
26=	Canti	33%	30%	33%	→	→
29=	Bollinger	33%	32%	32%	→	→
29=	Gratien & Meyer	n/a	33%	32%	n/a	→

Results for all brands tested available in the data table

n/a = tracking unavailable for this wave
= Represents equal rankings
↑/↓: Statistically significantly higher / lower than the previous wave at a 95% confidence level
Source: Wine Intelligence, Vinitrac® UK, May '19, Jun '22, Jun '23, (n≥1,010) drinkers of sparkling wine in the UK

Sparkling wine brand most often bought

Most brands have similar scores to 2022; Barefoot Bubbly has experienced a big increase in its ‘most often bought’ incidence

Brand most-often bought: Top 30

% who buy the following brand most often
Base = Those who have purchased the following brands in the past six months

Ranking '23		2022 (n=2,000)	2023 (n=2,021)	Tracking vs. '22
1	Freixenet	48%	46%	→
2=	Fillipo Sansovino	33%	39%	→
2=	Martini	36%	39%	→
2=	Blossom Hill	44%	39%	→
5=	Barefoot Bubbly	20%	35%	↑
5=	Chapel Down	34%	35%	→
7	Plaza Centro	40%	34%	→
8=	Nyetimber	37%	32%	→
8=	Yellow Tail	34%	32%	→
8=	Moët & Chandon	33%	32%	→
11	Mirabeau	n/a	30%	n/a
12=	Sorso	31%	27%	→
12=	i heart Wines	28%	27%	→
14=	Jacob's Creek	21%	25%	→
14=	La Gioiosa	30%	25%	→
14=	Graham Beck	n/a	25%	n/a
14=	Canti	19%	25%	→
18=	Codorníu	10%	24%	→
18=	Bella Cucina	27%	24%	→
20	Hardys	24%	23%	→
21	Nicolas Feuillatte	14%	22%	→
22=	Piper Heidsieck	16%	21%	→
22=	Laurent Perrier	15%	21%	→
22=	Zonin	22%	21%	→
25	Henkell	40%	20%	↓
26=	Veuve Clicquot	20%	19%	→
26=	Kylie Minogue	22%	19%	→
26=	Most Wanted	n/a	19%	n/a
26=	Lanson	26%	19%	→
26=	Valdo	27%	19%	→

Results for all brands tested available in the data table

2019 tracking not available due to methodology change
n/a = tracking unavailable for this wave
= Represents equal rankings; grey shading: low sample size (n<50)
↑/↓: Statistically significantly higher / lower than the previous wave at a 95% confidence level
Source: Wine Intelligence, Vinitrac® UK, May '19, Jun '22, Jun '23, (n≥1,010) drinkers of sparkling wine in the UK

Research Methodology

Sparkling Wine in the UK Market

2023

Research methodology

QUANTITATIVE

Data was collected in the UK since March 2017.

The June 2023 wave was tracked against May 2019 and June 2022.

Data was gathered via Wine Intelligence's Vinitrac® online survey of all alcohol drinkers and sparkling wine drinkers in the UK.

Respondents meet the following requirements:

- Adult drinking age
- Permanent resident of the country
- Are aware of at least one sparkling wine type
- Drink at least one type of sparkling wine at least once a year

For the purpose of tracking, a sub-set of sparkling wine drinkers who have drunk sparkling at least once a year (n=962) in 2019 data have been used.

Invalid respondents (those who sped through the survey or gave inconsistent answers to selected questions) were removed before analysis.

The data is representative of UK sparkling wine drinkers in terms of gender, age, annual pre-tax household income and region.

The distribution of the sample is shown in the table.

		May-19	Jun-22	Jun-23
	n=	1,010	2,000	2,021
Gender*	Male	44%	46%	43%
	Female	56%	53%	57%
	Total	*100%*	*100%*	*100%*
Age	18-24	13%	11%	9%
	25-34	18%	19%	19%
	35-44	16%	18%	16%
	45-54	17%	18%	19%
	55-64	15%	13%	16%
	65+	20%	20%	21%
	Total	*100%*	*100%*	*100%*
Annual household income before taxes	Under £20,000	12%	12%	13%
	£20,000 - £29,999	18%	18%	11%
	£30,000 - £39,999	19%	21%	28%
	£40,000 - £59,999	23%	20%	14%
	£60,000+	28%	30%	34%
	Total	*100%*	*100%*	*100%*
Region	North	22%	23%	29%
	Midlands	15%	13%	9%
	South East + East	22%	25%	25%
	London	16%	17%	15%
	South West	10%	9%	7%
	Wales	4%	4%	4%
	Scotland	9%	7%	7%
	Northern Ireland	3%	2%	3%
	Total	*100%*	*100%*	*100%*

Source: Wine Intelligence, Vinitrac® UK, May '19, Jun '22, Jun '23, (n≥1,010) drinkers of sparkling wine in the UK

**Please note that additional Gender categories were also surveyed. These categories fell naturally in the sample and were not enforced via quotas*

Research methodology

BRAND POWER INDEX

The **Brand Power Index** is calculated by comparing the tested origins' incidence rates against each others for each health measure. We do this by comparing the individual incidence of each origin against the highest incidence of all origins to gauge how far / close each individual origin is to the top origin in each measure.

In this process, the incidence (%) is converted to an indexed value (#) per origin, for each measure, because we are dividing percentages to reach an integer. Once we have indexed each origin for each measure, we then again index these indexes to create one final indexed score which we use to rank the origin in the market. Each health measure is given a different weighting.

The index does not take account of sales volumes or value, sales trends over time or opinions.

Awareness	% who have heard of each brand (when prompted with a list of brand names and logos) Base = All wine drinkers	**Brand awareness index**	**Brand Power Index**
Purchase	% who have bought each brand in the past 3 months Base = All wine drinkers	**Brand purchase index**	
Conversion	% who have bought each brand in the past 3 months Base = Those who have heard of each brand		
Consideration	% who would consider buying each brand Base = Those who have heard of each brand		
Affinity	% who think each brand is right for people like them Base = Those who have heard of each brand	**Brand connection index**	
Recommendation	% who would recommend each brand to a friend Base = Those who have heard of each brand		

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