A division of the IWSR Group

United States

Sparkling Wine Landscapes 2023

Contents

Wine Intelligence Viewpoint

There are positive signals for sparkling wine in the US, with a growing base of consumers, increased frequency of purchase and evolving perceptions of the category, though there are signs that momentum could slow

The US sparkling wine market has shown remarkable growth in the past few years, increasing by nearly 10 million annual drinkers to just under 60 million.

Italian sparkling wine – led by Prosecco – stands at the forefront, holding half of all market share by volume, ahead of US producers.

The demographic landscape is changing, with younger women who drink sparkling wine stepping back, while men are becoming more prevalent. Younger male drinkers are the most involved and are driving rising engagement.

The market is shifting from conservative drinking to exploration, with significantly more consumers preferring to try new styles rather than only choosing the wines they know. Less importance is given to brands when selecting a wine, despite this still being the most important choice cue overall.

Sparkling wine continues to shed its traditional image as a drink primarily for special events and celebrations.

Instead, it is increasingly seen as suitable for casual occasions, making it a versatile option for a broader range of consumers. This is a lasting impact of the pandemic, when sparkling wine drinkers grew used to consuming sparkling wine on everyday occasions at home. Furthermore, the perception of sparkling wine quality has improved across all types, supporting greater affinity with the beverage.

Despite these positive trends, there are signs that growth in the category is slowing. Rapid growth during the pandemic appears to have been unsustainable, with volumes forecast to be stable over the next five years.

Opportunities

Growing popularity.
Increased consumption frequency.
More engaged consumers.
Italian sparkling wine.
Alternative packaging, including small formats.

Threats

US and Italian dominance.
Brands losing influence.
Static volume forecast.

Management Summary

Sparkling Wine in the US Market

2023

1. Sparkling wine gaining popularity

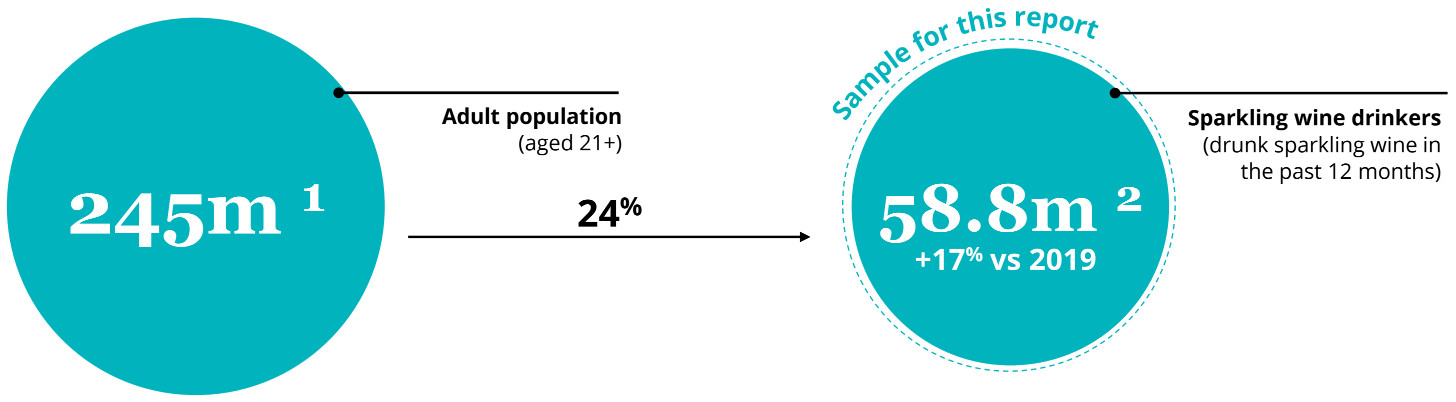
There has been a rapid surge in the population of sparkling wine drinkers, today representing an opportunity of almost 60 million people, or a quarter of all adults in the country.

This is 17% higher than four years ago. In 2017, sparkling wine accounted for 8.3% of the total wine category, increasing to over 12% in 2022, and is expected to reach 14% by 2027.

Sparkling wine volume has increased at a CAGR of over 5% over the past five years while the total wine category declined. However, sparkling volumes sold in 2022 were down on 2021, which suggests its growth in popularity may be waning.

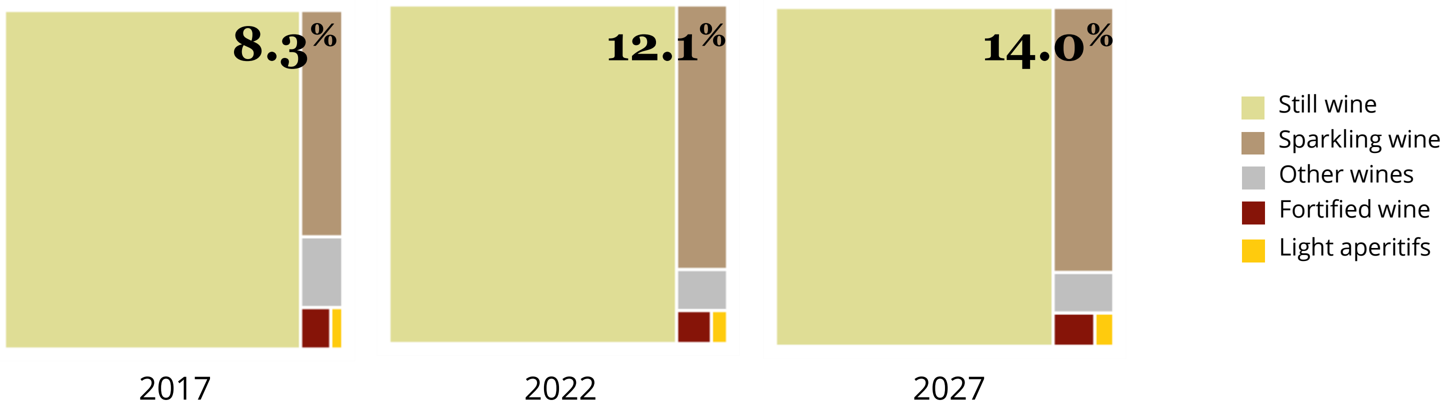
Population of sparkling wine drinkers

In million (LDA+ adults)



Sparkling wine market share

% of total wine category



[1] Adults aged 21+, US Census Bureau, population estimates
[2] Wine Intelligence online calibration study, May 2023 (n=4,015) US adults 21+ years - Drinkers of at least one type of sparkling wine in the past 12 months
IWSR, July 2023

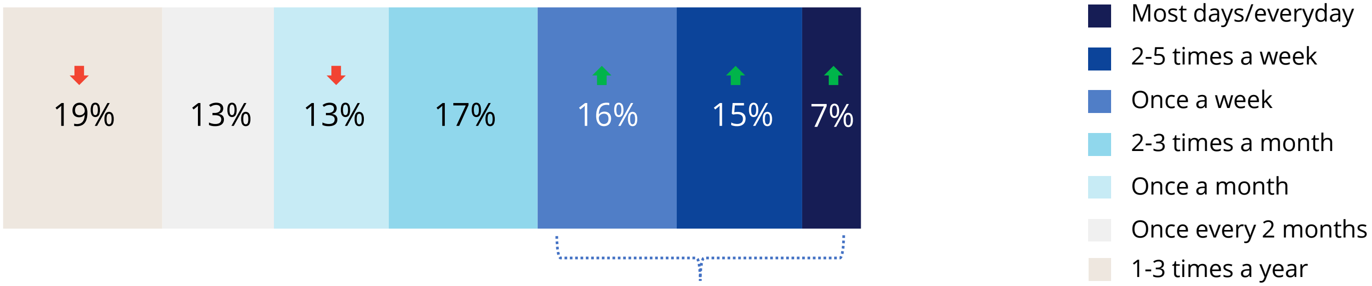
2. Increased consumption frequency

There was an impressive jump in consumption frequency for sparkling wine between 2019 and 2022, which has continued into 2023, suggesting that change during the pandemic has been carried through. Today, almost two in five consume sparkling wine weekly, against just over 20% in 2019.

Consumption of sparkling wine per capita in the US increased at more than the average rate for the top 20 markets between 2017 and 2022. However, the CAGR was negative from 2021 to 2022.

Consumption frequency

% who drink sparkling wine at the stated frequencies
Base = All drinkers of sparkling wine (n=1,043)



38% consume sparkling wine on a weekly basis (⬆ vs 22% in 2019)

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	13.1%	8.9%
2	St. Martin and St. Maarten	6.29	8.34	21.7%	32.6%
3	Italy	7.87	7.38	-1.2%	-6.2%
4	Turks and Caicos	5.27	6.50	-2.4%	23.4%
5	Germany	5.31	5.51	-1.9%	3.7%
38	United States	1.59	1.53	5.3%	-4.0%

⬆/⬇: 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 US
IWSR, July 2023

3. Changes in perception and occasion usage

While remaining the beverage of choice for events such as weddings and christenings, sparkling wine is increasingly seen as suitable for casual occasions and everyday drinking.

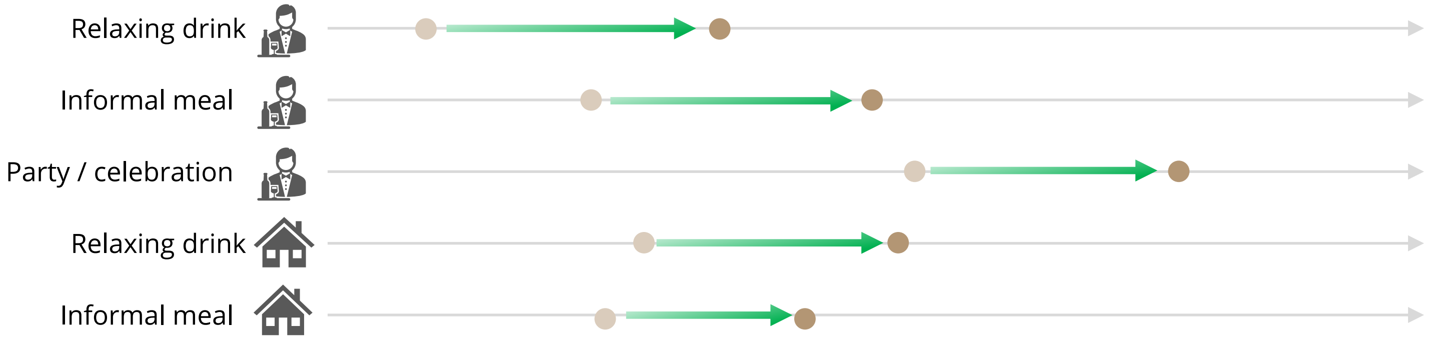
Three in 10 now consider sparkling wine to be suitable for a relaxing drink at the end of the day at home, up from 23% in 2019. This is most likely a result of the pandemic, with wine drinkers growing more accustomed to consuming sparkling wine in the home on everyday occasions.

Beverage suitability to special events

% who would consider drinking the following beverages on the following occasions
Minimum value: 25%, Maximum value: 56%
Base = Those who have drunk the following beverages in the past 12 months

Sparkling wine occasions suitability: Tracking

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



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

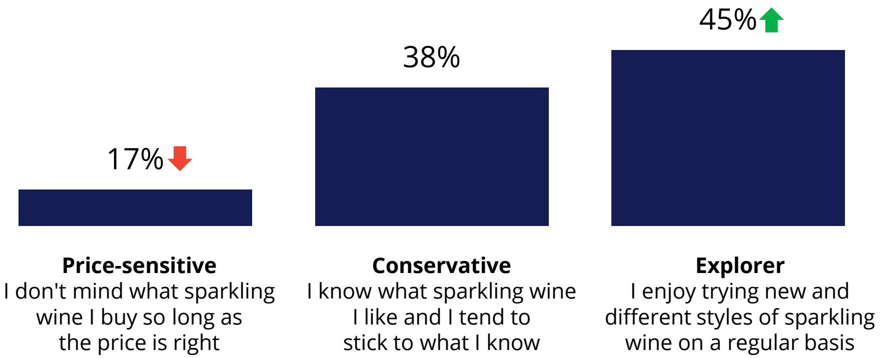
4. Younger men are driving rising engagement

Engagement is growing as attitudes towards sparkling wine shifts. The market has evolved from a conservative approach to consumers exploring, with nearly half of drinkers wanting to try new sparkling wines rather than sticking to what they know, an increase from 38% in 2019.

Men under 55 are driving change. They constantly show significantly higher involvement levels, more frequent usage, more diverse repertoires and higher typical spends.

Attitudes towards sparkling wine

% who have selected the following statements to be applicable to them
Base = All sparkling wine drinkers (n=1,043)



54% of male drinkers aged 35-54 are wine explorers

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

% who 'agree' or 'strongly agree' with the following statement
Base = All drinkers of sparkling wine (n=1,043)

	All drinkers of sparkling wine in the US	Male		
		21-34	35-54	55+
	(n=1,043)	(n=190)	(n=207)	(n=147)
Drinking sparkling wine gives me pleasure	80%	75%	86%	68%
I always look for the best quality sparkling wines I can get for my budget	75%	77%	78%	66%
Deciding which sparkling wine to buy is an important decision	69%	72%	78%	63%
I like to take my time when I purchase a bottle of sparkling wine	66%	71%	78%	58%
I have a strong interest in sparkling wine	61%	71%	74%	41%
I feel competent about my knowledge of sparkling wine	54%	65%	71%	42%
Sparkling wine is important to me in my lifestyle	54%	68%	67%	37%
Generally speaking, sparkling wine is an expensive drink	46%	58%	55%	38%

⬆ / ⬇: 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® US, May 2019 - June 2023 (n≥1,008) drinkers of sparkling wine in the US

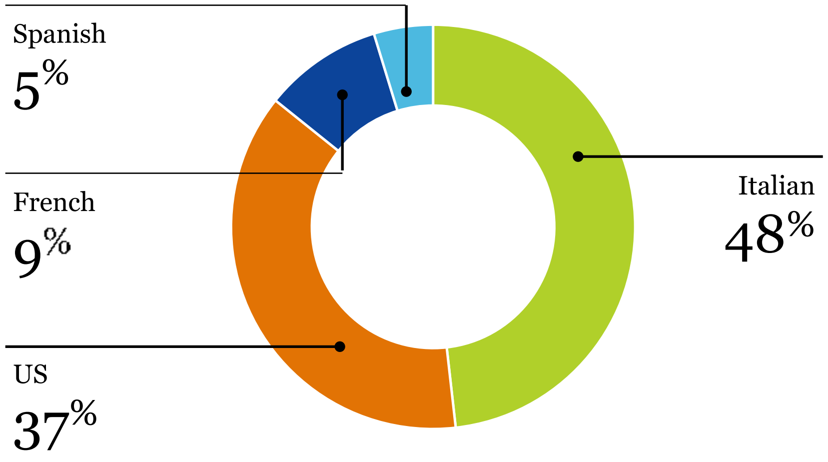
5. Italian sparkling wine dominates

Italian sparkling wine is in top position with half of by all market share by volume, ahead of domestic sparkling wine. Sparkling wine from Italy has achieved a CAGR of over 10% since 2017 and there is a strong opportunity for Italian producers to continue capitalising on their popularity in the US market.

Italian sparkling wine's success is driven by Prosecco, which has about half of Italian wine volumes in the US. Consumers who reported drinking Prosecco have gone from a third in 2019 to 42% in 2023.

Top origins by market shares (volume)

% of purchases that fall within the origin below



Top 5 sparkling wine types by consumption: Tracking

% who have drunk wine from the following places in the past 12 months
Base = All drinkers of sparkling wine (n≥1,008)

	2019 (n=2,000)	2022 (n=1,008)	2023 (n=1,043)	Tracking vs. '19	Tracking vs. '22
Sparkling wine / Champagne from the USA	**55%**	**55%**	**61%**	⬆	⬆
Rosé sparkling wine	**47%**	**45%**	**55%**	⬆	⬆
Prosecco	**33%**	**29%**	**42%**	⬆	⬆
Fruit-infused sparkling wine	**28%**	**30%**	**36%**	⬆	⬆
Champagne	**22%**	**25%**	**32%**	⬆	⬆

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

6. Brands loosing influence

Brand awareness is one of the most important choice cues, but it is losing influence overall, down by 6ppt on average since 2019 across sparkling wine types. Less reliance on brands suggests consumers might be more open to trying new and different styles of sparkling wine, which could impact established brands.

Some well-known brands have experienced declining awareness levels since the pandemic but seem to have regained some ground in the short term.

Sparkling wine choice cues in the off-trade

Average for all sparkling wine types tested
% who find the following factors to be the most important factor when buying sparkling wine in the off-trade
Base = All drinkers of sparkling wine (n≥1,043)

Ranking '23		2019 (n=2,000)	2023 (n=1,043)	ppt difference
1	A brand I am aware of	29%	23%	-6
2	Recommendation by friends or family	16%	15%	-1
3=	Recommendation by wine critic or writer	9%	10%	1
3=	Recommendation by shop staff or shop leaflets	11%	10%	-1
5=	Promotional offer	7%	9%	2
5=	Alcohol content	8%	9%	1
5=	Appeal of the bottle and / or label design	8%	9%	1
8	Whether the sparkling wine has won a medal or award	4%	8%	3
9	Whether it's suitable for gifting	4%	7%	3

Most severe decreases for brand influence for Asti (-17ppt ↓) and Cava (-14ppt ↓). The importance of 'brand' has grown for sparkling wine from other origins (+8ppt ↑)

= Represents equal ranking
↑/↓: 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 US

Management Summary

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

	2019	2023	Tracking
Sparkling wine / Champagne from the USA	**55%**	**61%**	↑
Rosé sparkling wine	**47%**	**55%**	↑
Prosecco	**33%**	**42%**	↑
Fruit-infused sparkling wine	**28%**	**36%**	↑
Champagne	**22%**	**32%**	↑

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

	2019	2023	Tracking
Red wine	**68%**	**69%**	→
White wine	**63%**	**68%**	↑
Beer	**55%**	**58%**	→
Vodka	**44%**	**52%**	↑
Rosé wine	**46%**	**51%**	↑

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

	2019	2023	Tracking
Dom Pérignon	**57%**	**52%**	↓
Korbel	**54%**	**50%**	↓
Martini	**48%**	**50%**	→
Yellow Tail	**54%**	**49%**	↓
Barefoot Bubbly	**49%**	**43%**	↓

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%**	**79%**	↓
Half bottle (375ml)	**13%**	**27%**	↑
Single serve bottle (187ml)	**15%**	**26%**	↑
Magnum (1.5L)	**14%**	**25%**	↑
Single serve can	**7%**	**16%**	↑

↑/↓: 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 US

Market Data

Sparkling Wine in the US Market

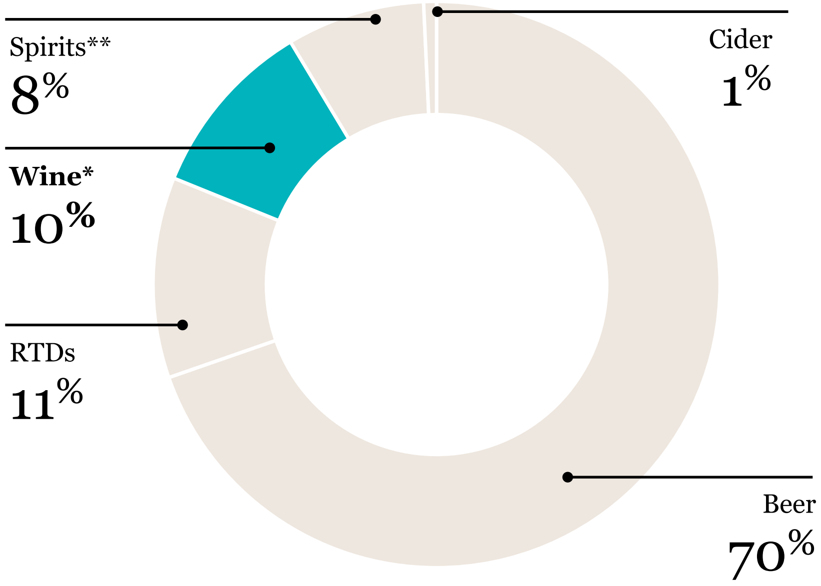
2023

Total beverage alcohol market

Beer dominates the US market, with nearly three-quarters of total alcohol volume; after a drop in volume over the last five years, wine is forecasted to continue its decline

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	3,508,601.07	3,427,106.77	0.0%	-1.5%
Beer	2,457,747.20	2,387,762.76	-2.2%	-2.2%
RTDs	393,058.41	392,709.10	26.2%	0.9%
Wine*	362,468.19	351,422.65	-1.3%	-2.3%
Spirits**	269,426.60	270,195.60	2.9%	1.6%
Cider	25,900.67	25,016.67	-1.6%	-2.6%

* 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

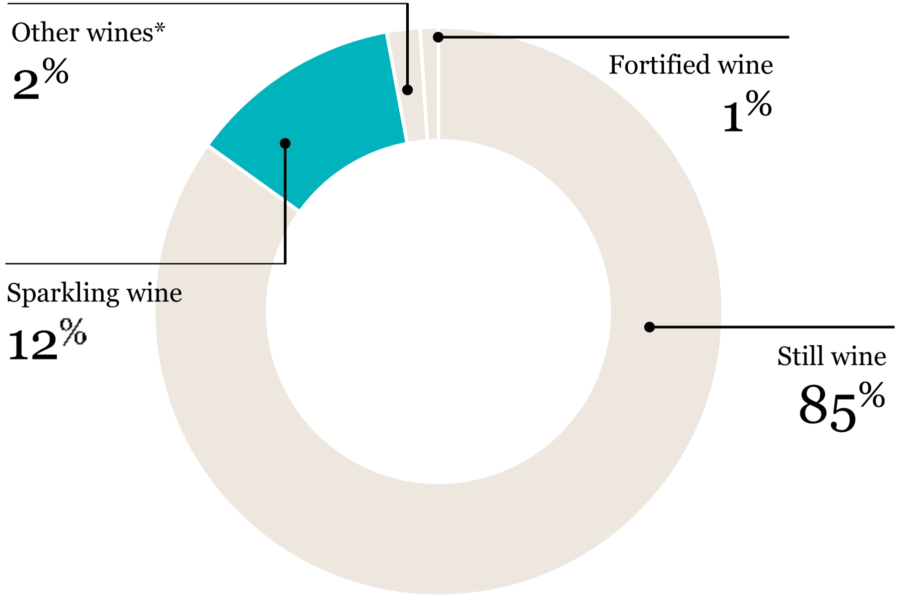
Source: IWSR, July 2023

Total wine market

Still wine has most wine market volume but has suffered a drop, while sparkling wine volumes have increased at a CAGR of more than 5% over the past five years

Total wine market share by category**

% of purchases that fall within the categories below



Total wine market volumes by category

000s 9-litre cases

	2021	2022	CAGR 17-22	CAGR F 22-27
Total Wine	362,468.19	351,422.65	-1.3%	-2.3%
Still Wine	306,107.28	297,054.85	-2.0%	-2.9%
Sparkling Wine	43,863.22	42,479.45	6.3%	0.7%
Other Wines*	7,350.35	6,604.10	-7.5%	0.4%
Fortified Wine	3,456.44	3,612.70	-2.6%	1.0%
Light Aperitifs	1,690.90	1,671.55	0.8%	0.5%

*Other Wines includes non-grape based wines

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

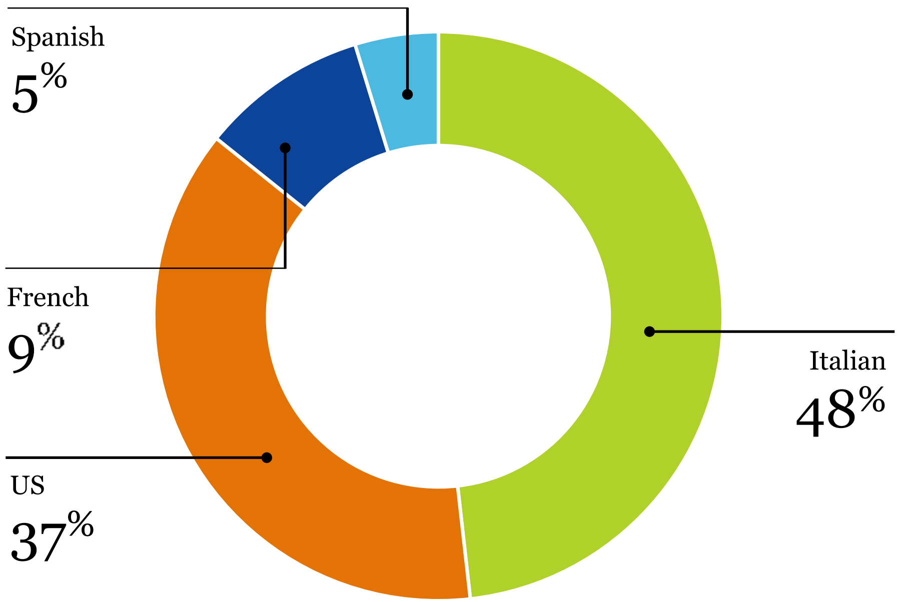
Source: IWSR, July 2023

Sparkling wine volumes by origin

Italian sparkling wine has half of the market after achieving a CAGR of more than 10% since 2017; US sparkling is in second and is expected to continue with steady growth of 3%

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	**43,863.22**	**42,479.45**	6.3%	0.7%
Italian	**20,898.10**	**20,196.45**	10.4%	3.5%
US	**16,074.50**	**15,728.15**	3.4%	-3.1%
French	**4,165.05**	**3,983.80**	6.3%	0.9%
Spanish	**2,128.40**	**1,983.00**	-1.0%	-2.5%
International *	**201.25**	**203.50**	3.4%	3.6%
Argentinian	**165.75**	**140.00**	-7.5%	-7.8%
German	**104.75**	**91.75**	-3.9%	-2.8%
Australian	**52.50**	**54.50**	-7.4%	-0.4%
South African	**33.00**	**35.00**	6.1%	4.2%
New Zealand	**24.00**	**26.50**	13.6%	7.2%

*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 sells at an average bottle price of US$14.30; French fizz is significantly more expensive than other origins and has experienced the best growth over the last five years

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	14.34	2.2%	1.0%
1	Italian	12.04	1.2%	0.5%
2	US	9.54	0.8%	1.4%
3	French	47.52	4.2%	0.5%
4	Spanish	10.13	0.3%	0.1%
5	International*	9.32	-0.2%	1.1%
6	Argentinian	9.33	0.4%	0.2%
7	German	9.60	1.0%	0.1%
8	Australian	9.86	0.7%	0.1%
9	South African	8.99	0.0%	0.0%
10	New Zealand	11.99	0.0%	0.0%

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

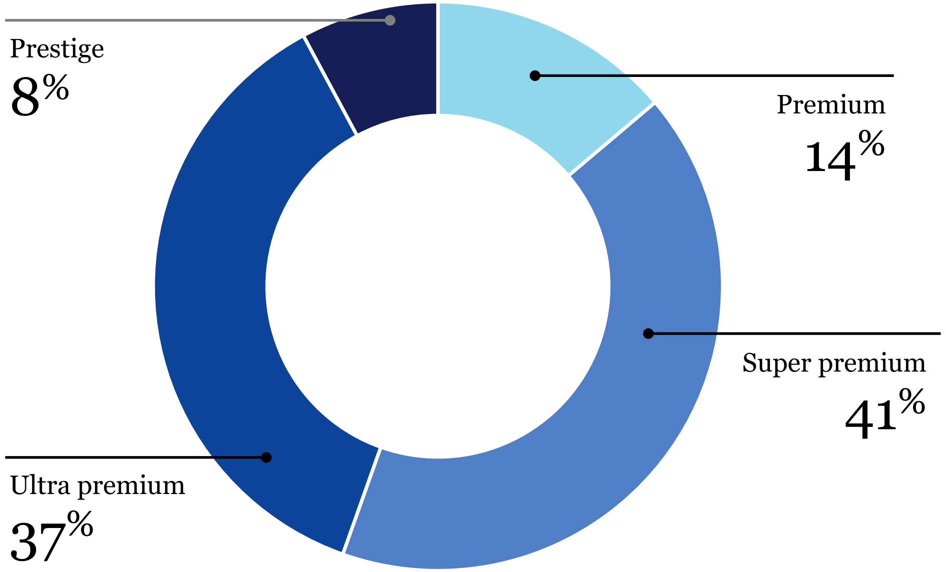
Source: IWSR, July 2023

Champagne by price band

The market for Champagne is mostly driven by volumes in the ultra and super-premium price bands; volume growth over the past five years has been bigger in the highest price bands

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
Premium (Under USD 40.00)	301.66	311.70	2.0%	3.3%
Super Premium (USD 40.00 to 59.99)	973.90	938.75	4.9%	3.2%
Ultra Premium (USD 60.00 to 99.99)	828.95	828.60	6.5%	1.6%
Prestige (USD 100.00 to 299.99)	163.24	176.85	8.3%	0.6%
Prestige Plus (USD 300.00 and over)	7.30	7.30	10.7%	1.7%

Other sparkling wine data available on the next slide

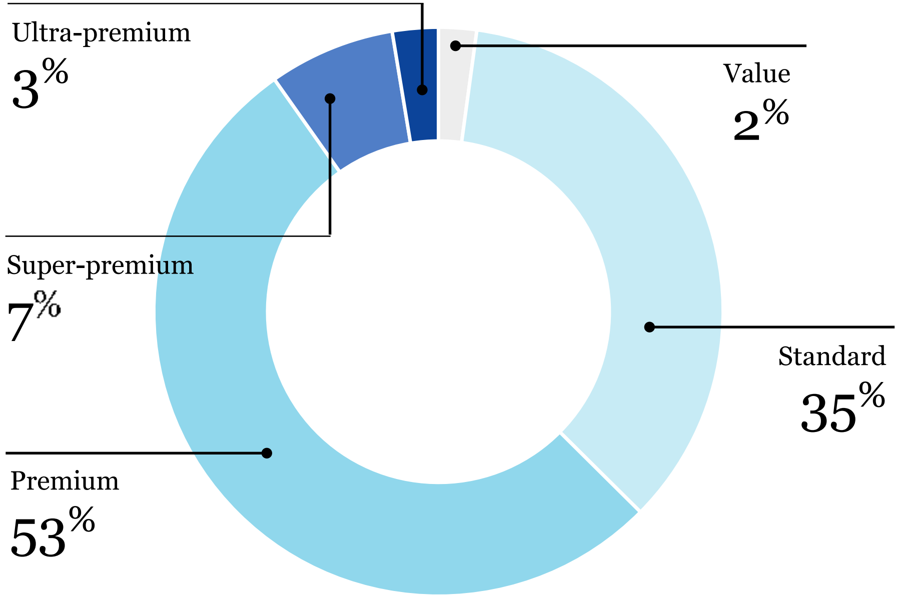
*Prestige Plus omitted from pie chart due to small market share (<1%)
Source: IWSR, July 2023

Other sparkling wine by price band

The vast majority of non-Champagne sparkling wine is sold in the premium category

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
Value (USD 3.00 to 4.99)	821.25	867.75	11.7%	4.7%
Standard (USD 5.00 to 9.49)	14,775.70	14,188.90	1.9%	-5.1%
Premium (USD 9.50 to 14.99)	21,958.00	21,226.70	10.2%	3.3%
Super Premium (USD 15.00 to 24.99)	2,888.60	2,883.15	3.1%	2.6%
Ultra Premium (USD 25.00 to 49.99)	1,144.25	1,049.20	14.9%	2.3%
Prestige (USD 50.00 to 99.99)	0.37	0.55	n/a	48.7%

Champagne data available on the previous slide

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

Source: IWSR, July 2023

Sparkling wine consumption per capita

Per capita consumption of sparkling wine in the US has increased at more than the average for the top 20 markets over the past five years. However, the CAGR was negative between 2021 and 2022

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	13.1%	8.9%
2	St. Martin and St. Maarten	6.29	8.34	21.7%	32.6%
3	Italy	7.87	7.38	-1.2%	-6.2%
4	Turks and Caicos	5.27	6.50	-2.4%	23.4%
5	Germany	5.31	5.51	-1.9%	3.7%
6	Lithuania	4.88	5.06	7.3%	3.6%
7	Latvia	4.47	4.89	2.6%	9.4%
8	France	4.73	4.86	-1.3%	2.7%
9	Guadeloupe	4.17	4.81	-1.8%	15.5%
10	Martinique	4.22	4.43	-4.6%	4.8%
11	Estonia	4.08	4.34	4.0%	6.3%
12	Belgium and Luxembourg	4.28	4.27	-1.5%	-0.2%
13	Austria	3.44	3.54	0.3%	2.9%
14	Switzerland	3.23	3.33	0.9%	3.0%
15	Cayman Islands	3.13	3.31	2.1%	5.8%
16	Sweden	3.28	3.30	6.7%	0.6%
17=	United Kingdom	3.16	3.01	-0.6%	-4.8%
17=	Slovenia	2.89	3.01	3.0%	4.1%
18	New Zealand	3.13	2.94	-1.6%	-6.1%
19	Reunion	2.55	2.93	0.7%	14.7%
38	United States	1.59	1.53	5.3%	-4.0%

Source: IWSR, July 2023

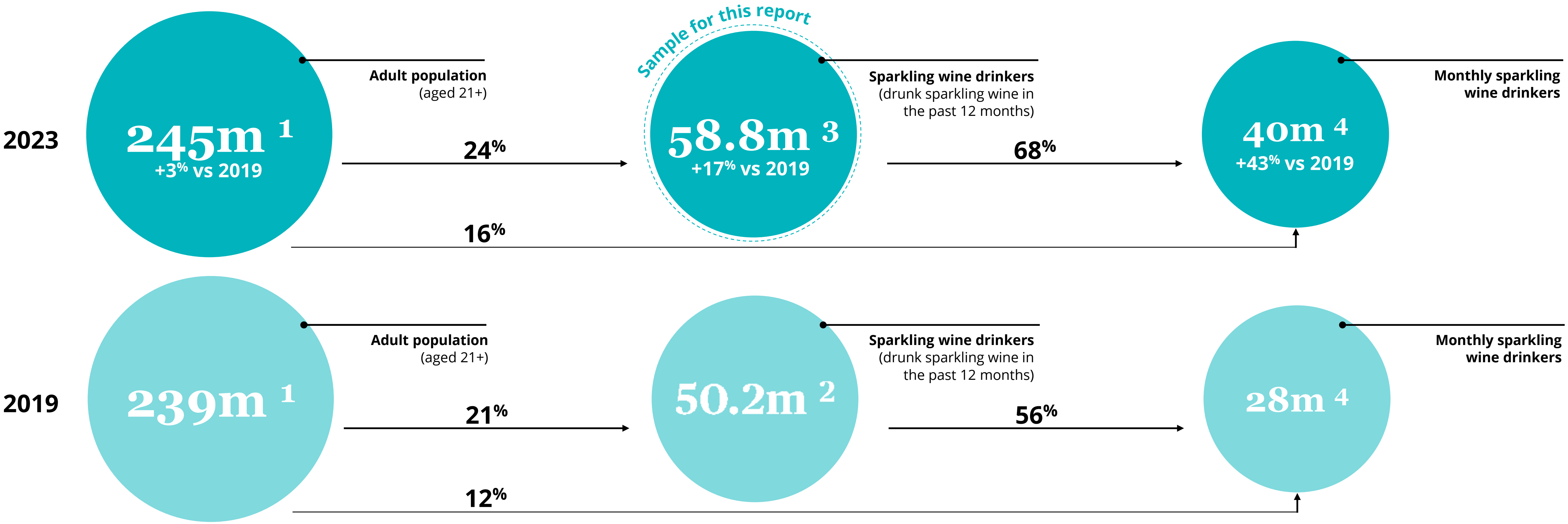
Market Demographics

Sparkling Wine in the US Market

2023

US sparkling wine drinkers

A surging population of sparkling wine drinkers reflects the growing popularity of the category



1 Adults aged 21+, US Census Bureau, population estimates
2 Wine Intelligence online calibration studies with YouGov and SSI, September 2019, (n=2,258) US adults,21+ 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=4,015) US adults 21+ years - Drinkers of at least one type of sparkling wine in the past 12 months
4 Wine Intelligence, Vinitrac® US July 2023 (n=1,043) drinkers of sparkling wine in the US

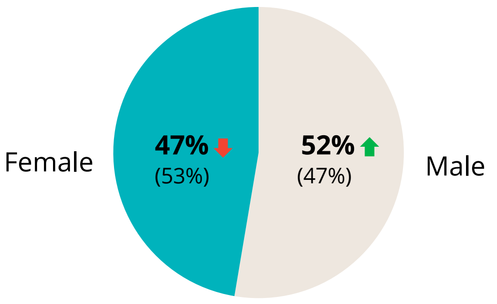
Demographics

Men have become more prevalent within the population of sparkling wine drinkers. One in five of the sparkling wine drinking population has a gross annual household income of over US$150,000 and about the same proportion is based in California

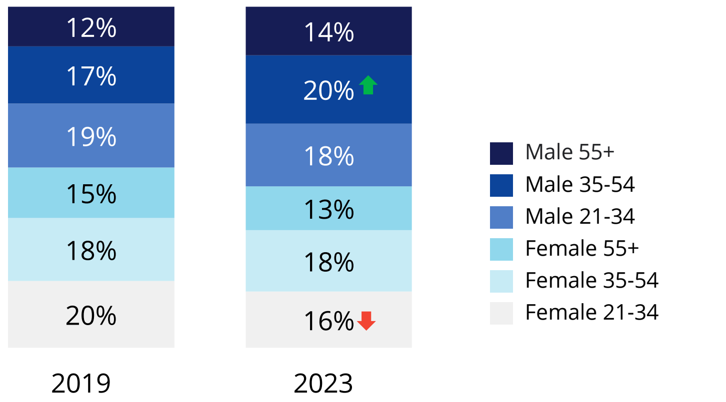
Sparkling wine drinkers: who are they?

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

Gender



Age

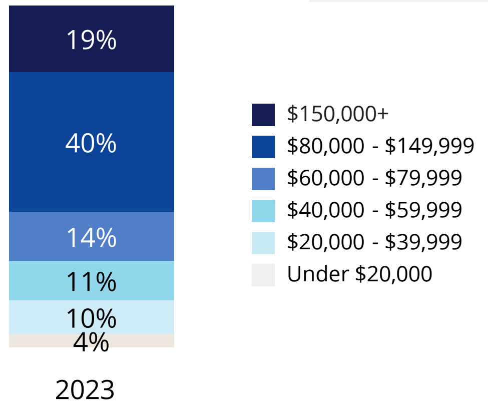


Leading states

	2019	2023	Tracking
California	18%	18%	→
Texas	6%	8%	→
Florida	6%	7%	→
New York	7%	7%	→
Illinois	4%	5%	→
Pennsylvania	4%	3%	→
Washington	3%	3%	→

Income

Note
Tracking not represented due to methodology change. From 2023, the sample is also quota-based on income.



Data into brackets: 2019 data

↑/↓: 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 US

Drinking Repertoire

Sparkling Wine in the US Market

2023

Drinking repertoire

Apart from wine, the alcoholic drinks most frequently consumed by sparkling wine drinkers are beer and vodka. Drinkers have expanded their repertoires, with almost all drink types registering long-term increases. Tequila and RTDs have experienced the biggest jumps since 2019.

Other alcoholic beverage repertoire: Tracking

% who have drunk the following beverages in the past 12 months
Base = All sparkling wine drinkers (n ≥1,008)

Ranking '23		2019 (n=2,000)	2022 (n=1,008)	2023 (n=1,043)	Tracking vs. '19	Tracking vs. '22
1	Red wine	68%	66%	69%	→	→
2	White wine	63%	64%	68%	↑	→
3	Beer	55%	49%	58%	→	↑
4	Vodka	44%	41%	52%	↑	↑
5	Rosé wine	46%	46%	51%	↑	↑
6=	Whisky / Whiskey	37%	37%	45%	↑	↑
6=	Tequila	35%	34%	45%	↑	↑
8	Cocktails	33%	29%	41%	↑	↑
9=	Craft beer	36%	32%	35%	→	→
9=	Rum	34%	30%	35%	→	↑
9=	Sangria	35%	32%	35%	→	→
12	Hard seltzer	n/a	25%	33%	n/a	↑
13	Pre-mixed / ready to drink alcoholic beverages	21%	24%	32%	↑	↑
14	Sweet / dessert wine	24%	27%	28%	↑	→
15	Gin	20%	22%	26%	↑	↑

8 is the average number of alcoholic beverage types drunk (↑ vs 7 in 2019)

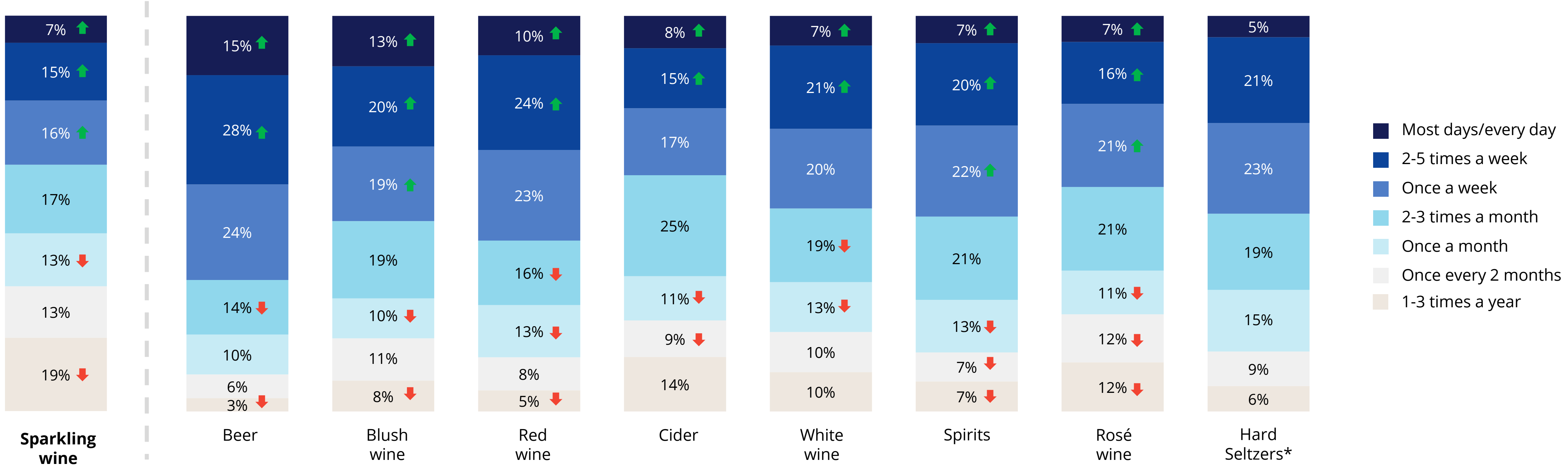
= Represents equal ranking, n/a: beverage type not tested during this wave
↑/↓: Statistically significantly higher / lower than previous waves at a 95% confidence level
Source: Wine Intelligence, Vinitrac® US, May 2019 - June 2023 (n≥1,008) drinkers of sparkling wine in the US

Consumption frequency

Sparkling wine is more likely than other categories to be consumed as an occasional drink with most consumers drinking it less than three times a months; weekly sparkling wine drinking is on the rise

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



*2019 Tracking not available for Hard Seltzer

↑/↓: Statistically significantly higher / lower than May 2019 at a 95% confidence level

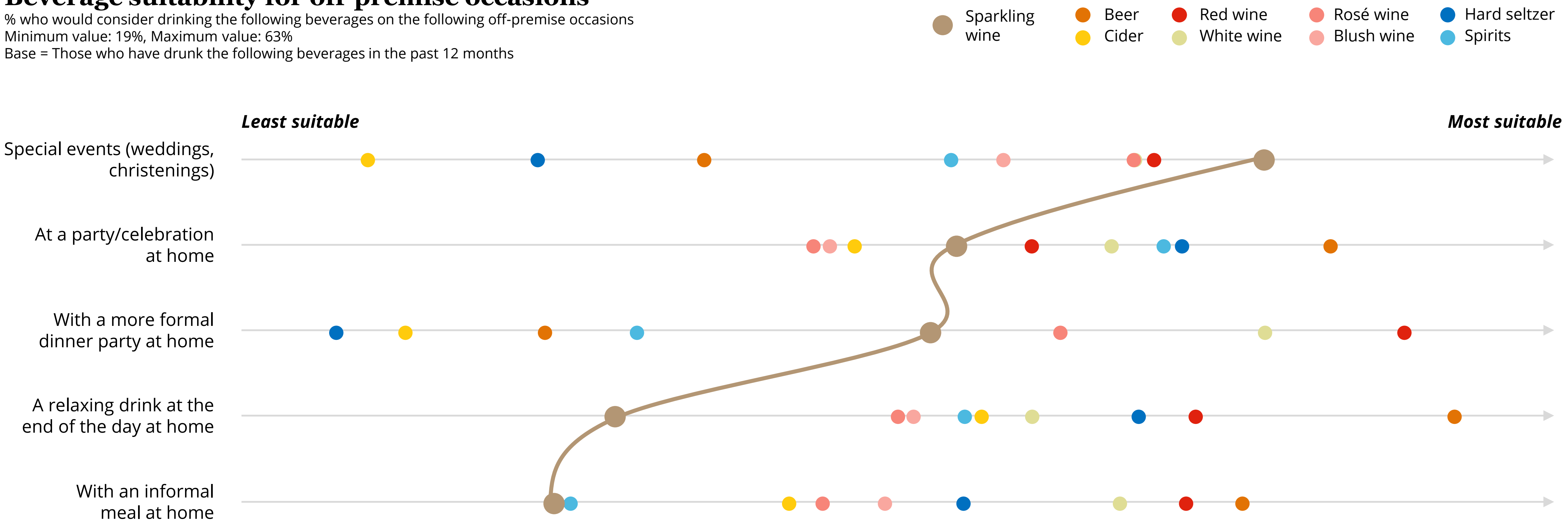
Source: Wine Intelligence, Vinitrac® US, May 2019 - June 2023 (n≥1,043) drinkers of sparkling wine in the US

Alcoholic beverage suitability

Sparkling wine is the beverage of choice for special events and is seen as well-suited for parties

Beverage suitability for off-premise occasions

% who would consider drinking the following beverages on the following off-premise occasions
Minimum value: 19%, Maximum value: 63%
Base = Those who have drunk the following beverages in the past 12 months



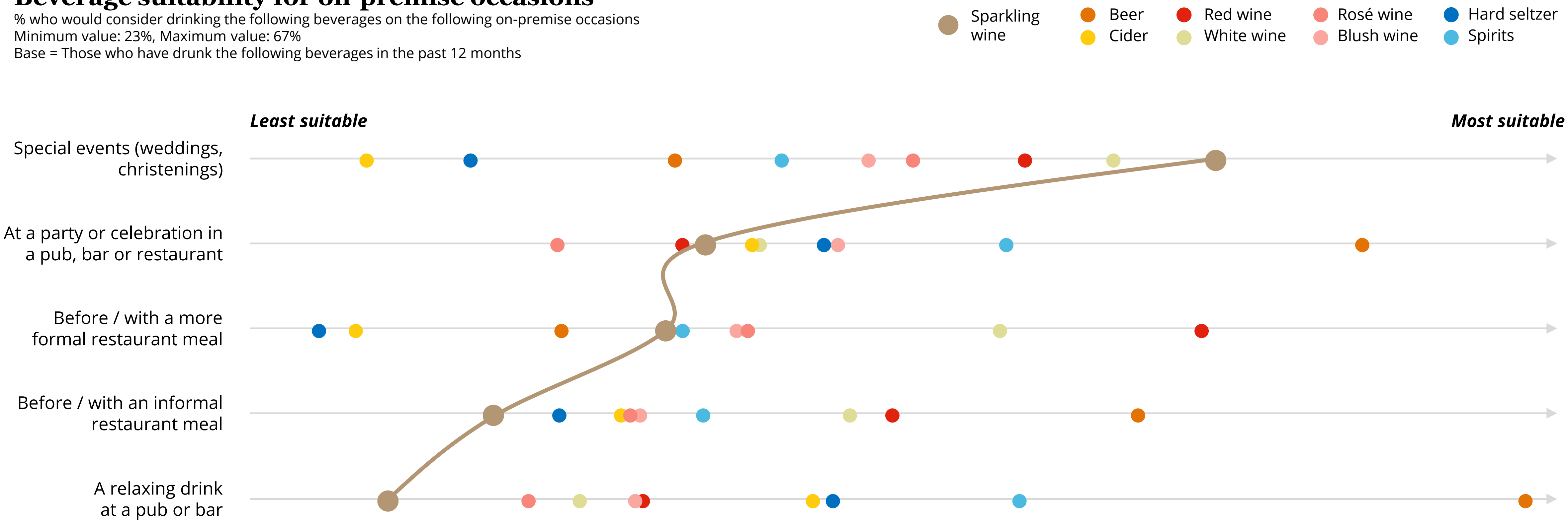
Source: Wine Intelligence, Vinitrac® US, June 2023 (n=1,043) drinkers of sparkling wine in the US

Alcoholic beverage suitability

Special events are viewed as the most suitable on-premise occasions for drinking sparkling wine

Beverage suitability for on-premise occasions

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



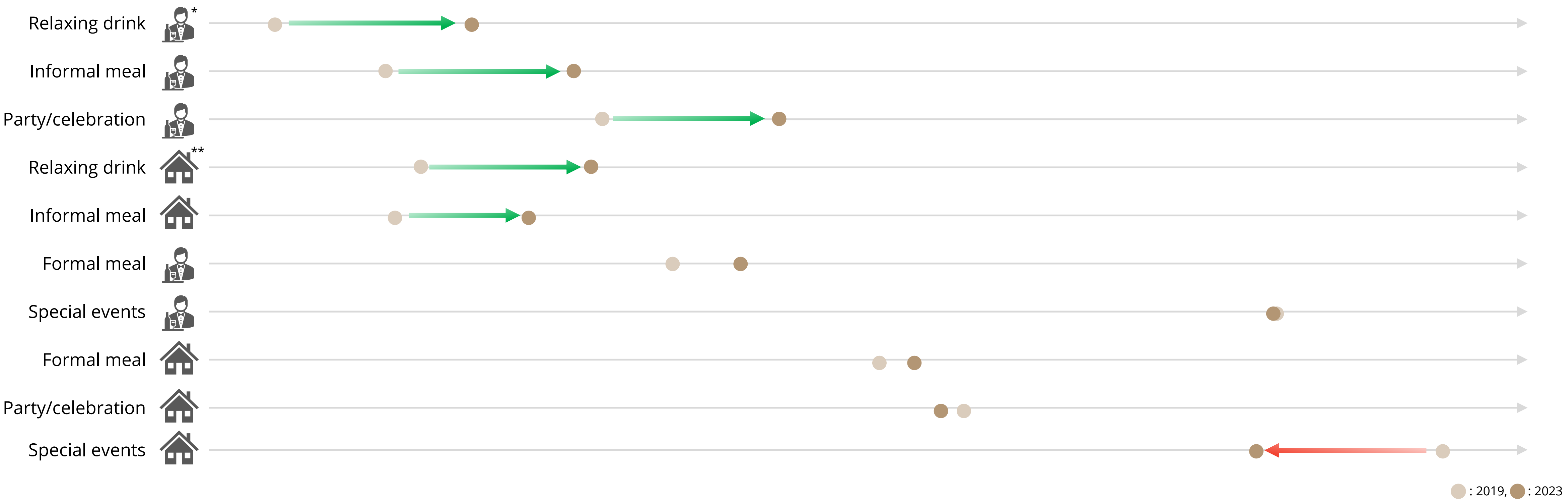
Source: Wine Intelligence, Vinitrac® US, June 2023 (n=1,043) drinkers of sparkling wine in the US

Sparkling wine suitability

Sparkling wine is increasingly seen as suitable on casual occasions; it is more associated than before with celebrations in bars and restaurants but being considered less for special events such as weddings

Sparkling wine occasions suitability: Tracking

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



* On-premise
** Off-premise

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

Consumption Behavior

Sparkling Wine in the US Market

2023

Consumption frequency

An impressive jump in consumption frequency for sparkling wine between 2019 and 2022 has continued into 2023, suggesting a change during the pandemic has carried through

Consumption frequency of sparkling wine: Tracking

% who drink sparkling wine at the stated frequencies
Base = All drinkers of sparkling wine (n≥1,008)

	2019 (n=2,000)	2022 (n=1,008)	2023 (n=1,043)	Tracking vs. '19	Tracking vs. '22
Most days / every day	**4%**	**9%**	**7%**	↑	→
2-5 times a week	**5%**	**15%**	**15%**	↑	→
Once a week	**12%**	**15%**	**16%**	↑	→
2-3 times a month	**17%**	**19%**	**17%**	→	→
Once a month	**17%**	**15%**	**13%**	↓	→
Once every two months	**15%**	**11%**	**13%**	→	→
1-3 times a year	**29%**	**17%**	**19%**	↓	→

38% 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® US, May 2019 - June 2023 (n≥1,008) drinkers of sparkling wine in the US

Consumption frequency

Vivid contrast of consumption frequency between gender and age groups. Younger males are more likely to consume sparkling wine more frequently

Consumption frequency of sparkling wine, by gender x age

% who drink sparkling wine at the stated frequencies
Base = All drinkers of sparkling wine (n=1,043)

	All drinkers of sparkling wine in the US	Male			Female		
		21-34	35-54	55+	21-34	35-54	55+
	(n=1,043)	(n=190)	(n=207)	(n=147)	(n=170)	(n=186)	(n=133)
Most days / every day	7%	15%	8%	3%	7%	6%	0%
2-5 times a week	15%	23%	29%	3%	12%	12%	1%
Once a week	16%	19%	22%	12%	15%	14%	14%
2-3 times a month	17%	16%	17%	15%	21%	20%	13%
Once a month	13%	11%	8%	15%	12%	19%	20%
Once every two months	13%	8%	8%	17%	12%	15%	21%
1-3 times a year	19%	8%	9%	36%	20%	15%	31%

47% of male drinkers consume sparkling wine on a weekly basis

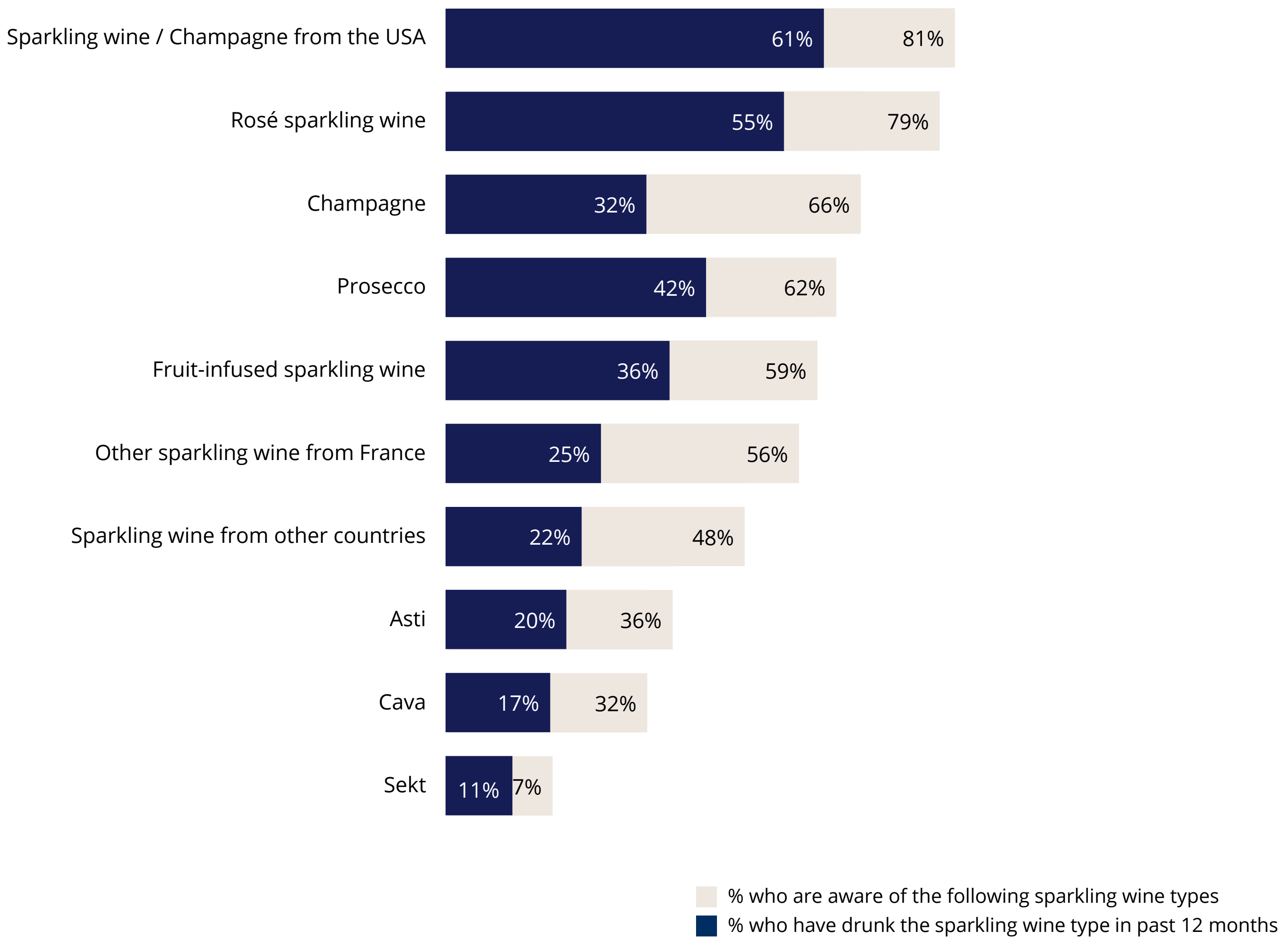
% / %: Statistically significantly higher / lower than all drinkers of sparkling wine at a 95% confidence level
Source: Wine Intelligence, Vinitrac® US, June 2023 (n=1,043) drinkers of sparkling wine in the US

Sparkling wine types consumption and awareness

Sparkling wine produced is the US is the most recognised type, followed by rosé and Champagne. US sparkling wine holds the highest conversion rate, with 75% of those who are aware of it having drunk it in the last six months

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 drinkers of sparkling wine (n=1,043)



Source: Wine Intelligence, Vinitrac® US, June 2023 (n=1,043) drinkers of sparkling wine in the US

Sparkling wine type awareness

There is increased knowledge of different sparkling wine types. Prosecco and non-Champagne sparkling wine from France have improved most on this metric

Sparkling wine awareness: Tracking

% who are aware of the following sparkling wine types
Base = All drinkers of sparkling wine (n≥1,008)

	2019 (n=2,000)	2022 (n=1,008)	2023 (n=1,043)	Tracking vs. '19	Tracking vs. '22
Sparkling wine / Champagne from the USA	**79%**	**76%**	**81%**	→	↑
Rosé sparkling wine	**78%**	**72%**	**79%**	→	↑
Champagne	**61%**	**57%**	**66%**	↑	↑
Prosecco	**52%**	**49%**	**62%**	↑	↑
Fruit-infused sparkling win	**54%**	**50%**	**59%**	↑	↑
Other sparkling wine from France	**44%**	**46%**	**56%**	↑	↑
Sparkling wine from other countries	**49%**	**38%**	**48%**	→	↑
Asti	**41%**	**32%**	**36%**	↓	↑
Cava	**21%**	**27%**	**32%**	↑	↑
Sekt	**n/a**	**14%**	**17%**	n/a	↑

n/a: the sparkling wine type has not been tested during this wave
↑ /↓: Statistically significantly higher / lower than the previous wave at a 95% confidence level
Source: Wine Intelligence, Vinitrac® US, May 2019 - June 2023 (n≥1,008) drinkers of sparkling wine in the US

Sparkling wine type awareness

Women aged over 34 are more likely to be aware of rosé, Prosecco and fruit-infused sparkling wines; sekt is the least known type in the market, especially among older consumers

Sparkling wine type awareness, by age and gender

% who are aware of the following sparkling wine types
Base = All drinkers of sparkling wine (n=1,043)

	All drinkers of sparkling wine in the US	Male			Female		
		21-34	35-54	55+	21-34	35-54	55+
	(n=1,043)	(n=190)	(n=207)	(n=147)	(n=170)	(n=186)	(n=133)
Sparkling wine / Champagne from the USA	81%	79%	85%	85%	77%	82%	80%
Rosé sparkling wine	79%	68%	74%	77%	83%	88%	87%
Champagne	66%	61%	71%	74%	62%	61%	70%
Prosecco	62%	50%	62%	59%	65%	67%	72%
Fruit-infused sparkling wine	59%	52%	64%	49%	63%	69%	54%
Other sparkling wine from France	56%	55%	63%	62%	49%	54%	54%
Sparkling wine from other countries	48%	39%	55%	51%	42%	49%	52%
Asti	36%	29%	38%	51%	17%	37%	53%
Cava	32%	36%	42%	25%	39%	26%	19%
Sekt	17%	26%	30%	8%	12%	13%	5%

% / %: Statistically significantly higher / lower than all drinkers of sparkling wine at a 95% confidence level
Source: Wine Intelligence, Vinitrac® US, June 2023 (n=1,043) drinkers of sparkling wine in the US

Sparkling wine type consumption

With awareness increasing, consumption of all types of sparkling wines has risen. The biggest long-term increases are in Champagne and other French sparkling wines

Sparkling wine consumption: Tracking

% who have drunk the sparkling wine type in past 12 months
Base = All drinkers of sparkling wine (n≥1,008)

	2019 (n=2,000)	2022 (n=1,008)	2023 (n=1,043)	Tracking vs. '19	Tracking vs. '22
Sparkling wine / Champagne from the USA	**55%**	**55%**	**61%**	⬆	⬆
Rosé sparkling wine	**47%**	**45%**	**55%**	⬆	⬆
Prosecco	**33%**	**29%**	**42%**	⬆	⬆
Fruit-infused sparkling wine	**28%**	**30%**	**36%**	⬆	⬆
Champagne	**22%**	**25%**	**32%**	⬆	⬆
Other sparkling wine from France	**15%**	**22%**	**25%**	⬆	➡
Sparkling wine from other countries	**18%**	**16%**	**22%**	⬆	⬆
Asti	**17%**	**15%**	**20%**	➡	⬆
Cava	**8%**	**13%**	**17%**	⬆	⬆
Sekt	**n/a**	**8%**	**11%**	n/a	⬆

n/a: the sparkling wine type has not been tested during this wave
⬆ / ⬇: Statistically significantly higher / lower than the previous wave at a 95% confidence level
Source: Wine Intelligence, Vinitrac® US, May 2019 - June 2023 (n≥1,008) drinkers of sparkling wine in the US

Sparkling wine types consumption

Men aged 35–54 are more likely than other groups to consume different types of sparkling wines; women aged 55+ are least likely to have a wide repertoire

Sparkling wine type consumption, by age and gender

% who have drunk the sparkling wine type in past 12 months
Base = All drinkers of sparkling wine (n=1,043)

	All drinkers of sparkling wine in the US	Male			Female		
		21-34	35-54	55+	21-34	35-54	55+
	(n=1,043)	(n=190)	(n=207)	(n=147)	(n=170)	(n=186)	(n=133)
Sparkling wine / Champagne from the USA	61%	67%	68%	56%	58%	64%	47%
Pink or Rosé sparkling wine or Champagne	55%	55%	57%	34%	61%	68%	45%
Prosecco	42%	34%	47%	35%	45%	46%	46%
Fruit-infused sparkling wine	36%	36%	46%	17%	43%	42%	25%
Champagne	32%	41%	44%	30%	29%	25%	19%
Other sparkling wine from France	25%	37%	35%	18%	24%	21%	9%
Sparkling wine from other countries	22%	26%	32%	17%	19%	20%	13%
Asti	20%	17%	24%	24%	13%	19%	21%
Cava	17%	24%	28%	8%	20%	12%	3%
Sekt	11%	20%	20%	1%	8%	9%	1%

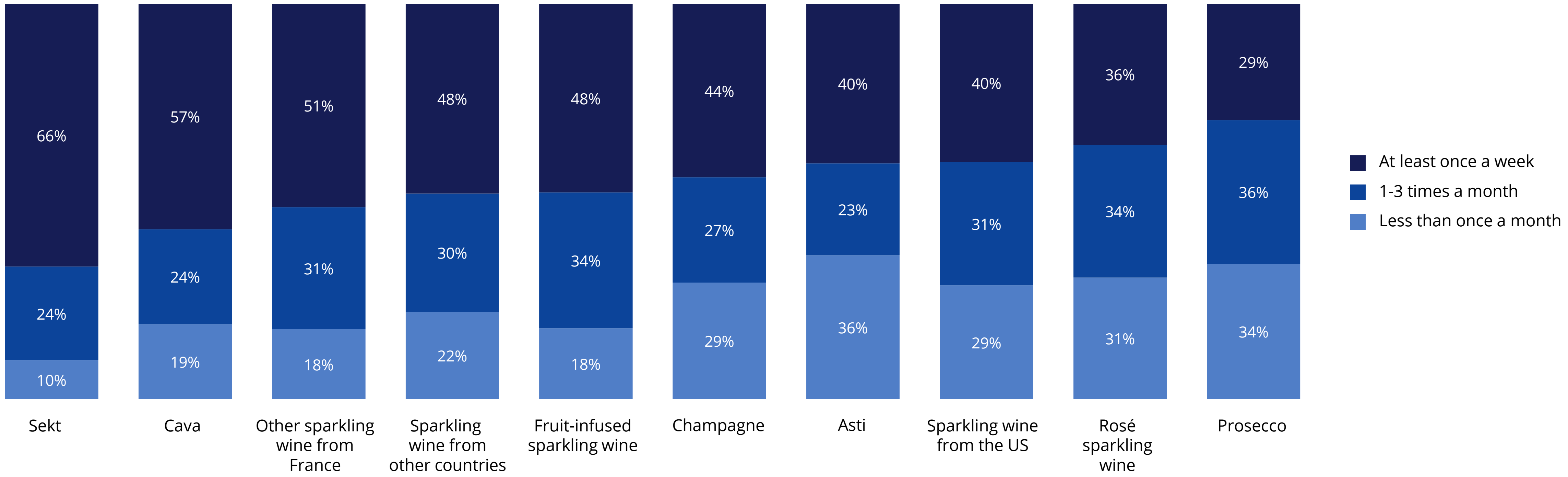
% / %: Statistically significantly higher / lower than all drinkers of sparkling wine at a 95% confidence level
Source: Wine Intelligence, Vinitrac® US, June 2023 (n=1,043) drinkers of sparkling wine in the US

Consumption frequency

Sekt has the highest consumption frequency, but from a small base; US sparkling wine is consumed weekly by 40% of its drinkers, similar to Asti

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



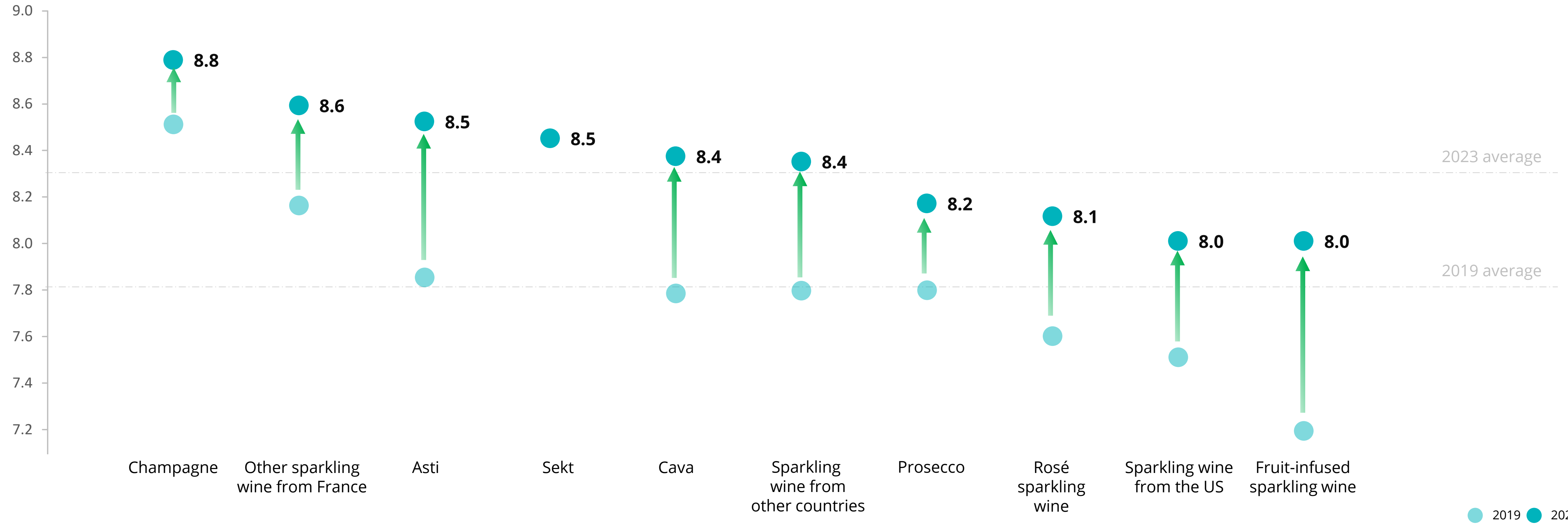
Source: Wine Intelligence, Vinitrac® US, June 2023 (n=1,043) drinkers of sparkling wine in the US

Quality perception

US drinkers are expressing more positive views about the quality of all sparkling wine types; French sparkling wines, including Champagne, are seen as the highest quality of all tested

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

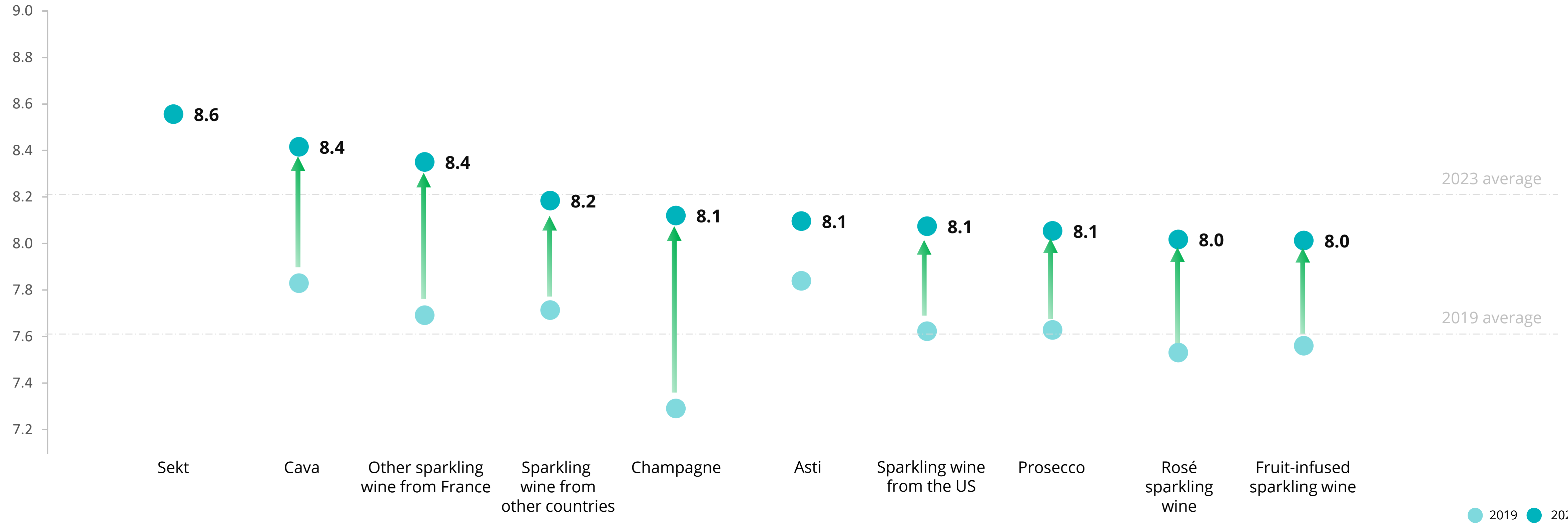
Source: Wine Intelligence, Vinitrac® US, May 2019 - June 2023 (n≥1,043) drinkers of sparkling wine in the US

Value for money

Opinions on value for money have improved significantly for almost all sparkling wine types; Champagne has seen the biggest increase in value for money perception among its base

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® US, May 2019 - June 2023 (n≥1,043) drinkers of sparkling wine in the US

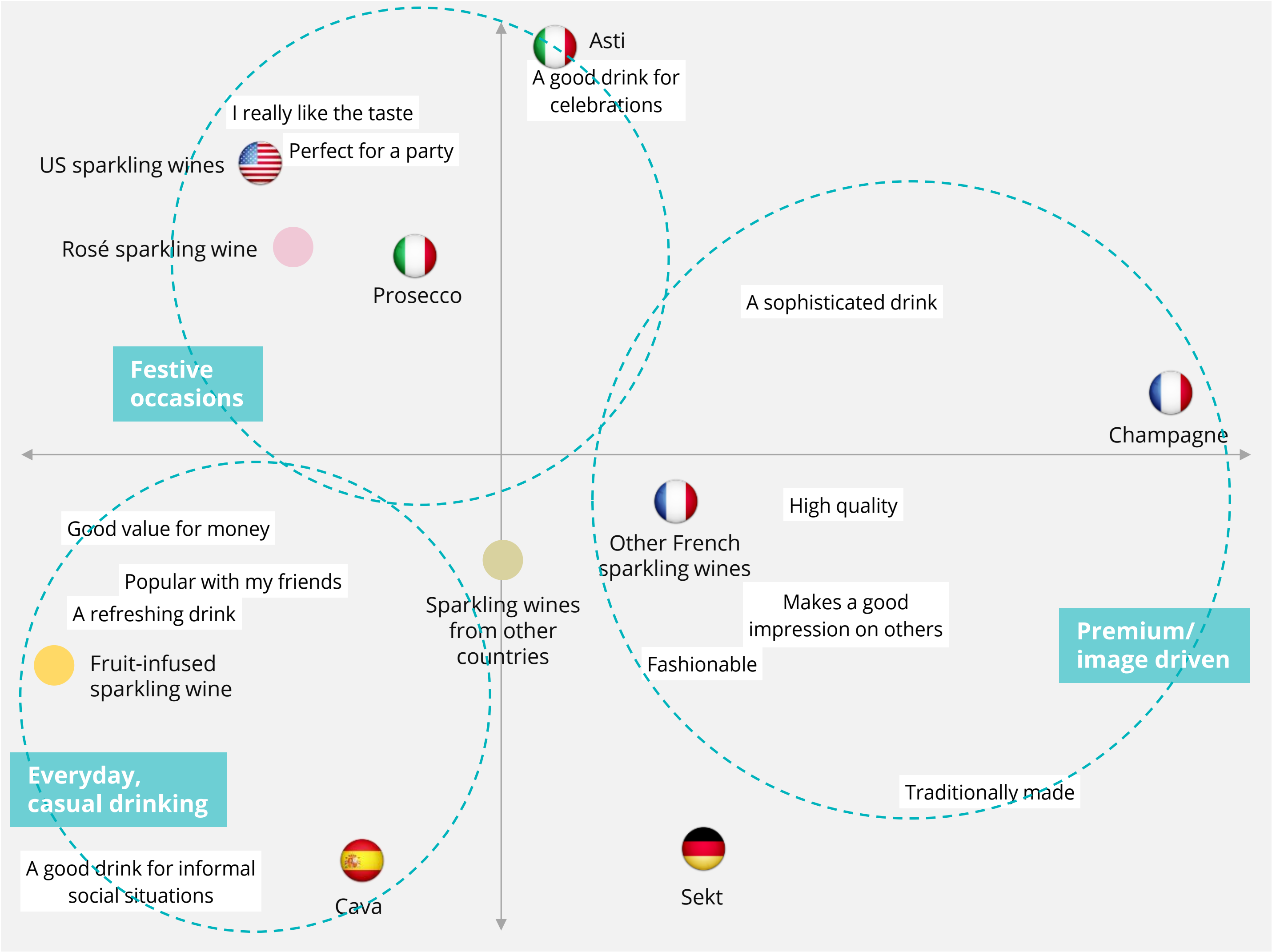
Imagery perception

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

French sparkling wines are most associated with sophistication, quality and tradition, and highly associated with making a good impression on others or being trendy. Rosé, Italian and US sparkling wines are seen as suitable for festive occasions, while other sparkling types are considered suitable for everyday and casual drinking

Sparkling wine types imagery perception

Base = Those who have drunk the following sparkling wine types



Source: Wine Intelligence, Vinitrac® US, June 2023 (n=1,043) drinkers of sparkling wine in the US

Imagery perception

Champagne and Prosecco score the highest image associations overall and overperform on celebrations; Champagne also distinguishes itself on quality, fashion and being traditionally-made

Sparkling wine type 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

	Champagne	Prosecco	Fruit-infused sparkling wine	Rosé sparkling wine	Sparkling wine from other countries	Other sparkling wine from France	Sparkling wine / Champagne from the USA	Cava	Asti	Sekt
A good drink for celebrations	51%	47%	37%	44%	41%	38%	46%	37%	46%	36%
High quality	54%	39%	35%	38%	41%	42%	36%	37%	39%	43%
I really like the taste	41%	45%	47%	45%	37%	41%	42%	36%	42%	26%
Good value for money	29%	37%	42%	38%	37%	33%	41%	43%	34%	30%
Perfect for a party	34%	39%	35%	40%	36%	32%	42%	31%	36%	30%
A refreshing drink	26%	37%	43%	36%	37%	36%	35%	37%	31%	30%
A sophisticated drink	41%	34%	26%	31%	32%	35%	29%	24%	32%	33%
A good drink for informal social situations	25%	31%	41%	32%	34%	27%	32%	36%	23%	32%
Popular with my friends	23%	33%	36%	30%	27%	27%	28%	28%	28%	31%
Makes a good impression on others	36%	28%	25%	22%	33%	31%	23%	29%	31%	31%
Fashionable	34%	29%	24%	29%	23%	26%	22%	31%	22%	28%
Traditionally made	38%	21%	23%	19%	24%	27%	20%	25%	19%	24%

Green / turquoise: Statistically significantly higher than 3 or more / 2 sparkling wine types at a 95% confidence level
Source: Wine Intelligence, Vinitrac® US, June 2023 (n=1,043) drinkers of sparkling wine in the US

Purchase Behavior

Sparkling Wine in the US Market

2023

Purchase locations

US sparkling wine is most likely to be bought in stores than other sparkling wine types; sparkling wine from other countries is mostly purchased in the on-premise; there has been a widespread increase in on-premise purchase across sparkling wine types

Sparkling wine types purchase location

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

	Sparkling wine / Champagne from the USA	Rosé sparkling wine	Fruit-infused sparkling wine	Asti	Sparkling wine from other countries	Prosecco	Other sparkling wine from France	Champagne	Cava	Sekt
In a store	75%	73%	71%	68%	68%	68%	64%	64%	58%	55%
In a bar or pub	30%	26%	33%	32%	37%	28%	41%	33%	40%	49%
In a restaurant	44%	42%	46%	39%	51%	46%	47%	48%	52%	51%

Buying sparkling wine in bars or pubs has increased by +14ppt ⬆ vs 2019. The change is partially driven by men aged 35–54. The most significant increases were for: Asti (+19ppt ⬆), other sparkling wines from France (+19ppt ⬆) and Cava (+18ppt ⬆)

Green / turquoise: Statistically significantly higher than 3 or more / 2 sparkling wine types at a 95% confidence level

Source: Wine Intelligence, Vinitrac® US, June 2023 (n=1,043) drinkers of sparkling wine in the US

Buying channels

Men aged 21–34 shop for sparkling wine through a broader range of channels, especially online platforms, including wine clubs, online retailers, supermarkets, winery websites and delivery apps

Sparkling wine-buying channels: by age and gender

% who have purchased sparkling wine from the following channels in the past six months
Base = All drinkers of sparkling wine (n=1,043)

	All drinkers of sparkling wine in the US	Male			Female		
		21-34	35-54	55+	21-34	35-54	55+
	(n=1,043)	(n=190)	(n=207)	(n=147)	(n=170)	(n=186)	(n=133)
In a liquor store	50%	48%	47%	50%	46%	53%	56%
In a supermarket	37%	33%	40%	35%	37%	41%	38%
In a wine shop	34%	36%	44%	31%	35%	29%	27%
In a super store	33%	37%	42%	20%	40%	34%	20%
In a club store	28%	27%	38%	22%	28%	26%	21%
In a state-controlled liquor store	18%	23%	25%	14%	12%	16%	15%
From a winery during the visit	17%	18%	26%	13%	19%	16%	10%
From a wine club or membership	16%	29%	28%	10%	12%	10%	4%
In a convenience store	16%	28%	25%	3%	13%	14%	4%
From an online retailer	13%	23%	21%	3%	10%	10%	4%
From a supermarket website	12%	22%	19%	5%	8%	13%	1%
From a winery's website	12%	22%	19%	3%	8%	8%	6%
From a delivery app	11%	22%	19%	3%	9%	7%	4%
In a drug store	10%	21%	15%	4%	6%	8%	3%
From Duty Free	8%	17%	11%	3%	9%	4%	1%
Other	1%	2%	1%	1%	2%	1%	1%

61% of men aged 21–34 are **online users,** vs 38% among all sparkling wine drinkers

% / %: Statistically significantly higher / lower than all sparkling wine drinkers at a 95% confidence level
Source: Wine Intelligence, Vinitrac® US, June 2023 (n=1,043) drinkers of sparkling wine in the US

Choice cues

Brand awareness is one of the most important choice cues, but 'brand' is losing influence overall; more significance is being attributed to gifting and accolades

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

	Sparkling wine / Champagne from the USA	Pink or Rosé sparkling wine or Champagne	Prosecco	Fruit-infused sparkling wine (from anywhere)	Champagne	Sparkling wine from France (other than Champagne)	Sparkling wine from other countries	Asti	Cava	Sekt
A brand I am aware of	25%	24%	25%	22%	24%	19%	26%	29%	15%	15%
Recommendation by friends or family	17%	17%	20%	16%	12%	16%	15%	12%	17%	10%
Recommendation by wine critic or writer	8%	10%	9%	6%	9%	12%	7%	10%	11%	14%
Recommendation by shop staff or shop leaflets	6%	10%	8%	11%	11%	12%	10%	9%	11%	8%
Promotional offer	10%	8%	9%	10%	8%	11%	11%	8%	11%	8%
Alcohol content	11%	9%	8%	9%	9%	7%	6%	10%	9%	10%
Appeal of the bottle and / or label design	9%	10%	6%	13%	8%	8%	8%	7%	5%	13%
Whether the sparkling wine has won a medal or award	7%	6%	6%	6%	9%	9%	8%	5%	8%	12%
Whether it's suitable for gifting	6%	5%	5%	6%	8%	5%	9%	9%	12%	9%

Brand association has become less relevant, decreasing on average by 6ppt vs 2019, with the biggest falls in Asti (-17ppt) and Cava (-14ppt). However, 'brand' has gained importance for sparkling wine from other origins (+8ppt)

Gifting suitability is gaining significance, especially for Cava (+8ppt) and sparkling wine from other origins (+6ppt)

Top 3 choice cues for the sparkling wine type
Green / turquoise: Statistically significantly higher than 3 or more / 2 sparkling wine types at a 95% confidence level
Source: Wine Intelligence, Vinitrac® US, June 2023 (n=1,043) drinkers of sparkling wine in the US

Formats

Men under 55 are most inclined to buy wine in a format other than the standard glass bottle; women aged 35 and over are most likely to order by the glass when out in bars or restaurants

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 (n=817)	Male 21-34 (n=146)	Male 35-54 (n=132)	Male 55+ (n=131)	Female 21-34 (n=124)	Female 35-54 (n=155)	Female 55+ (n=125)
Bottle (750ml)	79%	74%	75%	81%	76%	87%	85%
Half bottle (375ml)	27%	41%	41%	12%	23%	24%	10%
Single serve bottle (187ml)	26%	36%	34%	14%	27%	25%	13%
Magnum (1.5L)	25%	40%	39%	20%	18%	18%	14%
Single serve can	16%	22%	22%	7%	18%	18%	4%

	Those who purchase in the on-trade (n=611)	Male 21-34 (n=140)	Male 35-54 (n=112)	Male 55+ (n=60)	Female 21-34 (n=112)	Female 35-54 (n=119)	Female 55+ (n=65)
By the glass	78%	71%	73%	72%	74%	89%	96%
By the bottle (750ml)	44%	56%	56%	39%	43%	37%	18%
By the half bottle (375ml)	25%	37%	37%	14%	18%	19%	7%
By the small bottle (200ml)	18%	26%	24%	12%	11%	19%	4%

Smaller formats are attracting more consumers: half-bottle (+14ppt ⬆), single serve (+11ppt ⬆) and cans (+9ppt ⬆) in the off-premise; half-bottle (+11ppt ⬆) and small bottle (+10ppt ⬆) in the on-premise.

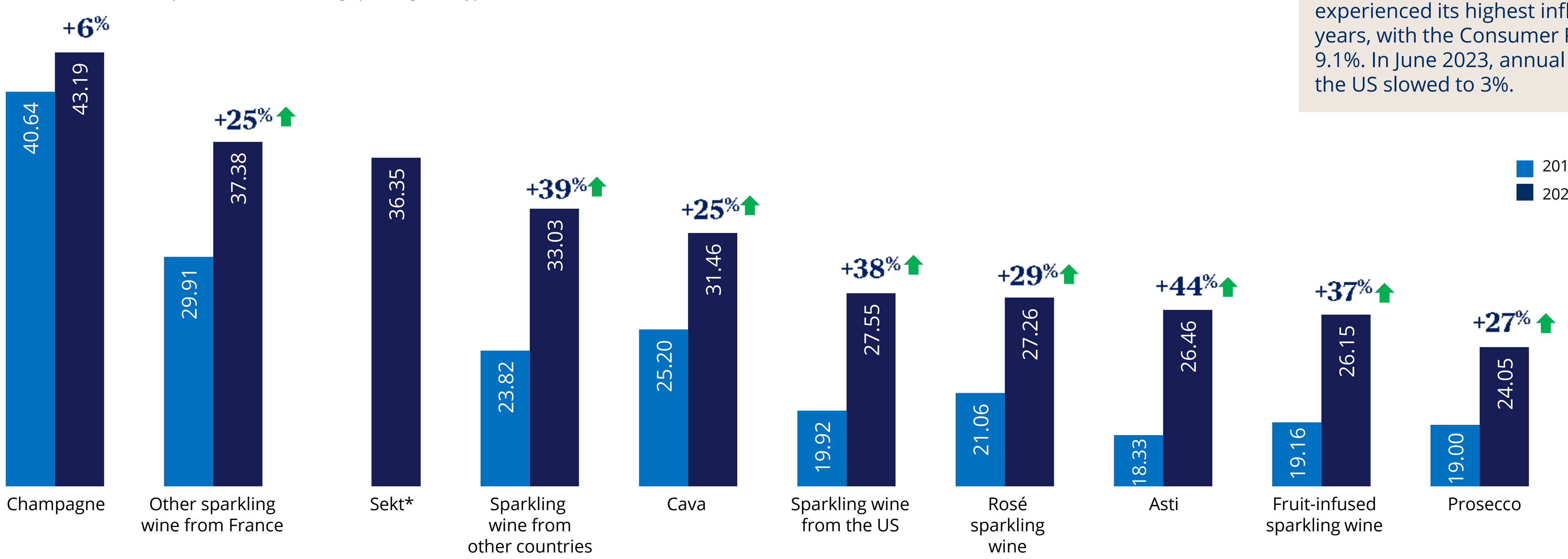
% / %: Statistically significantly higher / lower than all sparkling wine drinkers at a 95% confidence level
Source: Wine Intelligence, Vinitrac® US, June 2023 (n=1,043) drinkers of sparkling wine in the US

Typical spend

With the exception of Champagne, all sparkling wine types have experienced a significant increase in typical spend since 2019, averaging a rise of over 30% across all types

Typical spend in the off-trade by the bottle

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



Economic context: In 2022, the US experienced its highest inflation in 40 years, with the Consumer Price Index up 9.1%. In June 2023, annual inflation in the US slowed to 3%.

* Tracking not available
↑ / ↓: Statistically significantly higher / lower than the previous wave at a 95% confidence level
Sources: Wine Intelligence, Vinitrac® US, May 2019 - June 2023 (n≥1,008) drinkers of sparkling wine in the US
International Monetary Fund (IMF), World Economic Outlook, 2023

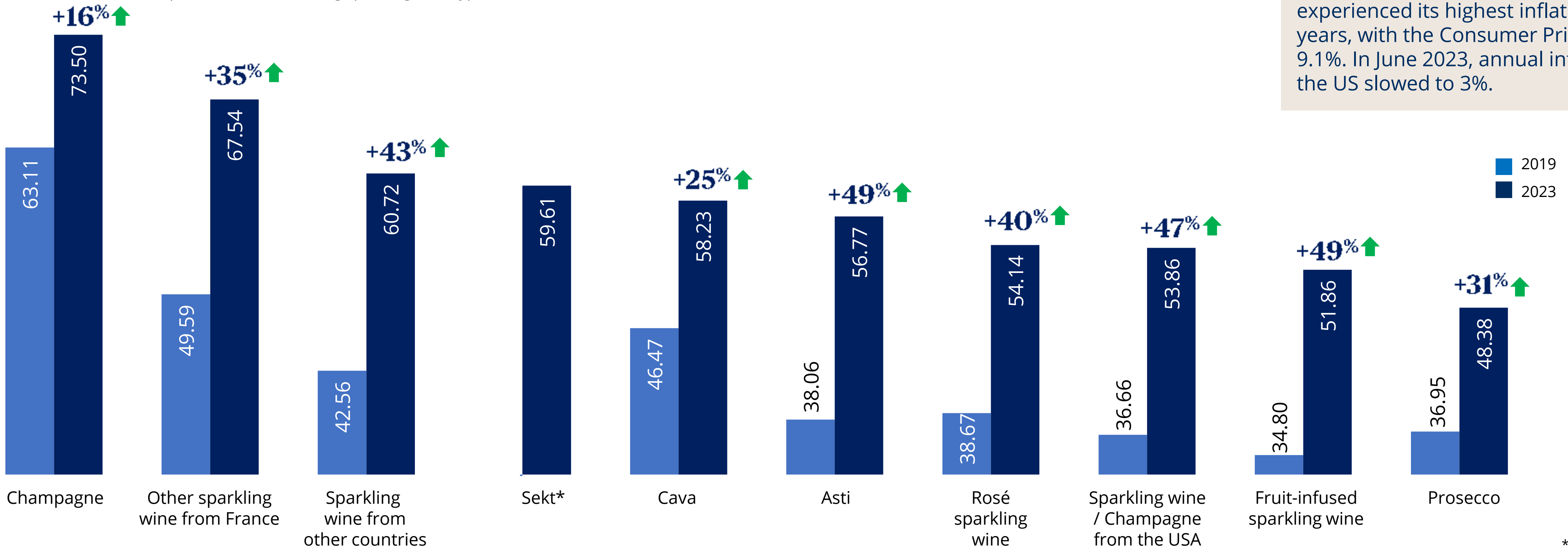
Typical spend

The typical spend per bottle in the on-trade has significantly increased, by 37% on average across all sparkling wine types, which is above inflation over the period shown

Typical spend in the on-trade by the bottle

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

Economic context: In 2022, the US experienced its highest inflation in 40 years, with the Consumer Price Index up 9.1%. In June 2023, annual inflation in the US slowed to 3%.



* Tracking not available
↑ / ↓: Statistically significantly higher / lower than the previous wave at a 95% confidence level
Sources: Wine Intelligence, Vinitrac® US, May 2019 - June 2023 (n≥1,008) drinkers of sparkling wine in the US
International Monetary Fund (IMF), World Economic Outlook, 2023

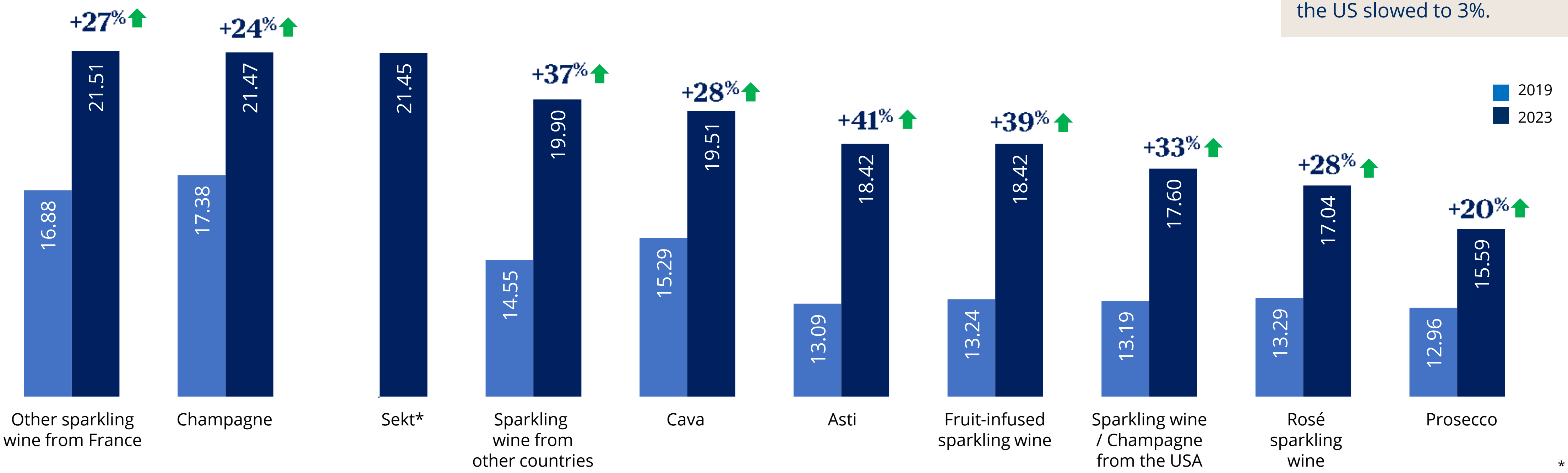
Typical spend

Consumers recall spending about the same price for a glass of Champagne and other French sparkling wine, at just over the US$20 mark; significant spend increases are seen across all styles

Typical spend in the on-trade by the glass

% who spend the following on sparkling wine by the glass in the on-trade
Base = Those who have purchased the following sparkling wine types in the on-trade

Economic context: In 2022, the US experienced its highest inflation in 40 years, with the Consumer Price Index up 9.1%. In June 2023, annual inflation in the US slowed to 3%.



* Tracking not available

↑/↓: Statistically significantly higher / lower than the previous wave at a 95% confidence level

Sources: Wine Intelligence, Vinitrac® US, May 2019 - June 2023 (n≥1,008) drinkers of sparkling wine in the US
International Monetary Fund (IMF), World Economic Outlook, 2023

Attitudes and Involvement

Sparkling Wine in the US Market

2023

Attitudes towards sparkling wine

Almost half of sparkling wine drinkers enjoy trying new and different styles on a regular basis, up from 38% in 2019; most men over 54 are cautious and choose wines they are familiar with

Attitudes towards sparkling wine: Tracking

% who have selected the following statements to be applicable to them
Base = All drinkers of sparkling wine (n≥1,008)

	2019 (n=2,000)	2022 (n=1,008)	2023 (n=1,043)	Tracking vs. '19	Tracking vs. '22
I enjoy trying new and different styles of sparkling wine on a regular basis	**38%**	**41%**	**45%**	↑	↑
I don't mind what sparkling wine I buy so long as the price is right	**22%**	**19%**	**17%**	↓	→
I know what sparkling wine I like and I tend to stick to what I know	**40%**	**40%**	**38%**	→	→

Attitudes towards sparkling wine, by age and gender

% who have selected the following statements to be applicable to them
Base = All drinkers of sparkling wine (n=1,043)

	All drinkers of sparkling wine in the US	Male			Female		
		21-34	35-54	55+	21-34	35-54	55+
	(n=1,043)	(n=190)	(n=207)	(n=147)	(n=170)	(n=186)	(n=133)
I enjoy trying new and different styles of sparkling wine on a regular basis	**45%**	**47%**	**54%**	**29%**	**46%**	**50%**	**40%**
I don't mind what sparkling wine I buy so long as the price is right	**17%**	**16%**	**12%**	**17%**	**21%**	**18%**	**19%**
I know what sparkling wine I like and I tend to stick to what I know	**38%**	**37%**	**34%**	**54%**	**33%**	**32%**	**41%**

↑ / ↓: 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® US, May 2019 - June 2023 (n≥1,008) drinkers of sparkling wine in the US

Involvement, value and expertise

There is stronger involvement among male drinkers, especially those aged 35–54

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

% who 'agree' or 'strongly agree' with the following statements
Base = All drinkers of sparkling wine (n=1,043)

	All drinkers of sparkling wine in the US	Male			Female		
		21-34	35-54	55+	21-34	35-54	55+
	(n=1,043)	(n=190)	(n=207)	(n=147)	(n=170)	(n=186)	(n=133)
Drinking sparkling wine gives me pleasure	80%	75%	86%	68%	76%	85%	86%
I always look for the best quality sparkling wines I can get for my budget	75%	77%	78%	66%	72%	77%	81%
Deciding which sparkling wine to buy is an important decision	69%	72%	78%	63%	61%	70%	67%
I like to take my time when I purchase a bottle of sparkling wine	66%	71%	78%	58%	63%	63%	63%
I have a strong interest in sparkling wine	61%	71%	74%	41%	62%	64%	43%
I feel competent about my knowledge of sparkling wine	54%	65%	71%	42%	50%	52%	35%
Sparkling wine is important to me in my lifestyle	54%	68%	67%	37%	49%	51%	42%
Generally speaking, sparkling wine is an expensive drink	46%	58%	55%	38%	42%	42%	33%

% / %: Statistically significantly higher / lower than all sparkling wine drinkers at a 95% confidence level
Source: Wine Intelligence, Vinitrac® US, June 2023 (n=1,043) drinkers of sparkling wine in the US

Brand Health

Sparkling Wine in the US 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 US 2023

[yellow tail]

1st

KORBEL
CALIFORNIA CHAMPAGNE

2nd

BAREFOOT BUBBLY

3rd

Sparkling wine Brand Power Index 2023

A changing landscape for brands, with most top 30 scores going down; Martini has been replaced in the top three by Korbel; the canned sparkling wine brand BABE has jumped nine places; improvements for Asti leader Tosti and US wineries Ste Michelle and J Vineyards

Ranking '23		Final Index	Tracking vs 2022	Score difference vs 2022
1	Yellow Tail	95.1	⬆+1	-3.4
2	Korbel	92.2	⬆+4	-7.2
3	Barefoot Bubbly	90.7	⬇-2	2.7
4	Martini	90.4	⬇-1	0.1
5	Moët & Chandon	88.1	=	-2.8
6	Cupcake	88.1	⬇-2	-0.1
7	Dom Pérignon	87.8	=	-4.8
8	Josh Cellars	74.5	⬆+2	-8.0
9	André	73.3	⬇-1	-1.3
10	Chandon	69.4	⬇-1	2.0
11	Veuve Clicquot	68.8	=	-4.0
12	La Marca	68.3	⬆+1	-6.2
13	Cook's	66.7	⬇-1	-4.6
14	Verdi	61.7	⬆+4	-4.7
15	Henkell	61.3	⬆+1	-3.7

Ranking '23		Final Index	Tracking vs 2022	Score difference vs 2022
16	Riunite	60.2	⬆+1	-2.9
17	Ballatore	60.0	⬇-3	1.1
18	BABE	58.7	⬆+9	-7.6
19	Perrier-jouët	58.2	⬆+1	-3.8
20	Luc Belaire	57.5	⬇-1	-3.0
21	Santa Margherita	56.1	⬆+4	-4.8
22	Gruet	55.1	⬆+2	-3.8
23	Gloria Ferrer	54.9	n/a	n/a
24	Tosti	54.1	⬆+8	-5.5
25	Domaine Ste. Michelle	54.0	⬆+6	-4.5
26	Freixenet	53.2	⬇-3	-1.7
27	J Vineyards	52.9	⬆+11	-5.8
28	Mumm Napa	52.4	⬇-7	0.7
29	Mionetto	52.4	⬆+6	-5.0
30	J. Roget	51.8	⬆+4	-4.3

= Represents equal rankings

⬆/⬇: Ranking higher / lower than the previous wave at a 95% confidence level

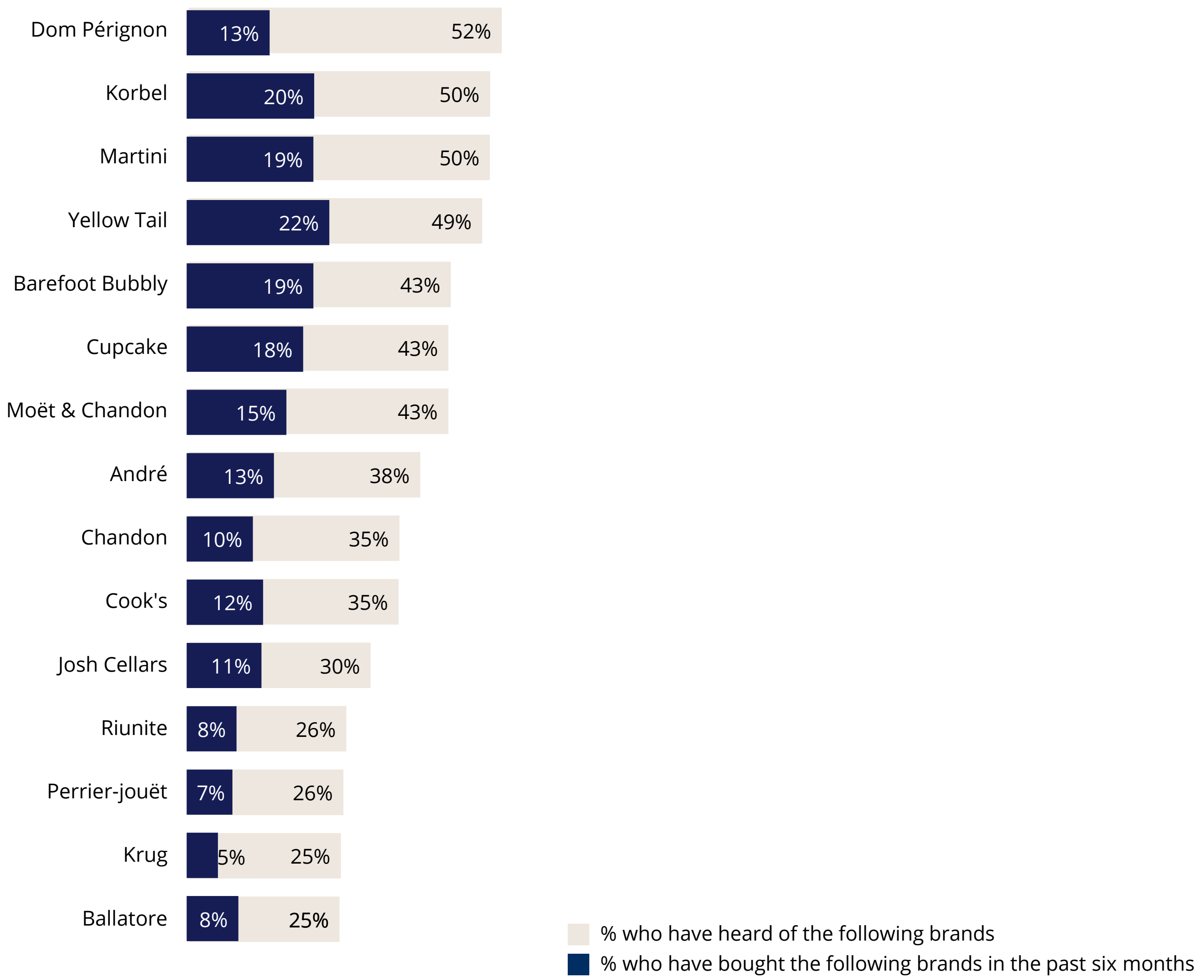
Source: Wine Intelligence, Vinitrac® US, May 2019 - June 2023 (n≥1,048) drinkers of sparkling wine in the US

Sparkling wine brands consumption and awareness

International names top the 15 most-known and consumed brands of sparkling wine in the US, with a broad spread of countries of origin

Top 15 sparkling wine brands

% who have heard of the following brands and % who have bought the them in past six months
Base = All drinkers of sparkling wine (n=1,043)



Source: Wine Intelligence, Vinitrac® US, June 2023 (n=1,043) drinkers of sparkling wine in the US

Sparkling wine brand awareness

Long-term decline in awareness for the top brands after the pandemic; some brands have improved awareness levels, including Chandon, Veuve Clicquot, La Marca Prosecco and Henkell Sekt

Brand awareness: Top 30

% who have heard of the following brands
Base = All drinkers of sparkling wine (n≥1,008)

Ranking '23		2019 (n=2,000)	2022 (n=1,008)	2023 (n=1,043)	Tracking vs. '19	Tracking vs. '22
1	Dom Pérignon	57%	43%	52%	↓	↑
2=	Korbel	54%	40%	50%	↓	↑
2=	Martini	48%	45%	50%	→	↑
4	Yellow Tail	54%	38%	49%	↓	↑
5=	Barefoot Bubbly	49%	40%	43%	↓	→
5=	Cupcake	40%	33%	43%	→	↑
5=	Moët & Chandon	47%	40%	43%	↓	→
8	André	45%	37%	38%	↓	→
9=	Chandon	30%	31%	35%	↑	→
9=	Cook's	35%	27%	35%	→	↑
11	Josh Cellars	n/a	22%	30%	n/a	↑
12=	Riunite	n/a	23%	26%	n/a	→
12=	Perrier-jouët	24%	23%	26%	→	→
14=	Krug	26%	20%	25%	→	↑
14=	Ballatore	27%	24%	25%	→	→

Ranking '23		2019 (n=2,000)	2022 (n=1,008)	2023 (n=1,043)	Tracking vs. '19	Tracking vs. '22
16	Verdi	23%	21%	24%	→	→
17=	La Marca	12%	18%	23%	↑	↑
17=	Veuve Clicquot	18%	20%	23%	↑	→
17=	Gruet	n/a	19%	23%	n/a	→
20=	Henkell	13%	17%	20%	↑	→
20=	Bollinger	24%	20%	20%	↓	→
20=	J. Roget	22%	20%	20%	→	→
23=	Domaine Ste. Michelle	n/a	15%	18%	n/a	↑
23=	Laurent-perrier	16%	15%	18%	→	→
23=	Jacob's Creek	16%	19%	18%	→	→
23=	Mionetto	17%	16%	18%	→	→
27=	Taittinger	18%	15%	17%	→	→
27=	Ruffino	17%	13%	17%	→	↑
27=	Santa Margherita	16%	15%	17%	→	→
27=	Veuve du Vernay	n/a	17%	17%	n/a	→

Results for all brands tested available in the data table

= Represents equal rankings; n/a: brand not tested during this wave
↑ / ↓: Statistically significantly higher / lower than the previous wave at a 95% confidence level
Source: Wine Intelligence, Vinitrac® US, May 2019 - June 2023 (n≥1,008) drinkers of sparkling wine in the US

Sparkling wine brand purchase

A broadly positive outlook for purchasing trends, with most top 30 brands experiencing an improvement

Brand purchase: Top 30

% who have bought the following brands in the past six months
Base = All drinkers of sparkling wine (n≥1,008)

Ranking '23		2019 (n=2,000)	2022 (n=1,008)	2023 (n=1,043)	Tracking vs. '19	Tracking vs. '22
1	Yellow Tail	22%	17%	22%	→	↑
2	Korbel	17%	15%	20%	↑	↑
3=	Barefoot Bubbly	22%	17%	19%	→	→
3=	Martini	15%	17%	19%	↑	→
5	Cupcake	17%	15%	18%	→	→
6	Moët & Chandon	12%	12%	15%	↑	↑
7=	André	13%	11%	13%	→	↑
7=	Dom Pérignon	9%	9%	13%	↑	↑
9	Cook's	10%	8%	12%	→	↑
10=	Josh Cellars	n/a	8%	11%	n/a	↑
10=	La Marca	4%	7%	11%	↑	↑
12	Chandon	7%	9%	10%	↑	→
13=	Verdi	6%	6%	9%	↑	↑
13=	Henkell	2%	6%	9%	↑	↑
15=	Veuve Clicquot	4%	7%	8%	↑	→

Ranking '23		2019 (n=2,000)	2022 (n=1,008)	2023 (n=1,043)	Tracking vs. '19	Tracking vs. '22
15=	Ballatore	6%	7%	8%	↑	→
15=	Riunite	n/a	6%	8%	n/a	→
18	Perrier-jouët	3%	5%	7%	↑	↑
19=	Gruet	n/a	4%	6%	n/a	↑
19=	Domaine Ste. Michelle	n/a	4%	6%	n/a	↑
19=	Luc Belaire	n/a	5%	6%	n/a	→
19=	J. Roget	3%	3%	6%	↑	↑
19=	Mionetto	4%	4%	6%	↑	→
24=	Gloria Ferrer	2%	n/a	5%	↑	n/a
24=	BABE	n/a	5%	5%	n/a	→
24=	Campo Viejo	n/a	3%	5%	n/a	↑
24=	Freixenet	3%	4%	5%	↑	→
24=	Santa Margherita	4%	5%	5%	→	→
24=	Roederer Estate	n/a	4%	5%	n/a	→
24=	Krug	4%	4%	5%	→	→

Results for all brands tested available in the data table

= Represents equal rankings; n/a: brand not tested during this wave
↑ / ↓: Statistically significantly higher / lower than the previous wave at a 95% confidence level
Source: Wine Intelligence, Vinitrac® US, May 2019 - June 2023 (n≥1,008) drinkers of sparkling wine in the US

Sparkling wine brand conversion

Several significant long-term increases in conversion, including an impressive jump of 23% for Henkell

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=2,000)	2022 (n=1,008)	2023 (n=1,043)	Tracking vs. '19	Tracking vs. '22
1	La Marca	38%	41%	47%	↑	→
2=	Yellow Tail	42%	45%	45%	→	→
2=	Barefoot Bubbly	45%	44%	45%	→	→
4=	Henkell	19%	34%	42%	↑	→
4=	Cupcake	43%	46%	42%	→	→
6	Luc Belaire	n/a	33%	40%	n/a	→
7=	Korbel	31%	37%	39%	↑	→
7=	Martini	32%	38%	39%	↑	→
7=	BABE	n/a	38%	39%	n/a	→
10=	Josh Cellars	n/a	35%	38%	n/a	→
10=	Gloria Ferrer	17%	n/a	38%	↑	n/a
12=	Verdi	27%	29%	37%	↑	→
12=	Campo Viejo	n/a	23%	37%	n/a	↑
12=	Veuve Clicquot	24%	34%	37%	↑	→
15=	McBride Sisters	n/a	n/a	36%	n/a	n/a

Ranking '23		2019 (n=2,000)	2022 (n=1,008)	2023 (n=1,043)	Tracking vs. '19	Tracking vs. '22
15=	Moët & Chandon	26%	30%	36%	↑	→
17=	André	29%	29%	35%	↑	→
17=	Domaine Ste. Michelle	n/a	28%	35%	n/a	→
17=	Zonin	17%	34%	35%	↑	→
20	Cook's	29%	29%	34%	→	→
21=	Argyle	n/a	39%	33%	n/a	→
21=	Heidsieck Co Monopole	14%	29%	33%	↑	→
21=	Freixenet	22%	23%	33%	↑	→
24=	Codorníu	23%	25%	32%	→	→
24=	Mionetto	23%	26%	32%	↑	→
24=	Segura Viudas	26%	24%	32%	→	→
24=	Roederer Estate	n/a	26%	32%	n/a	→
24=	Gerard Bertrand	n/a	n/a	32%	n/a	n/a
24=	J Vineyards	20%	26%	32%	↑	→
24=	Ballatore	21%	30%	32%	↑	→

Results for all brands tested available in the data table

= Represents equal rankings; n/a: brand not tested during this wave
↑ / ↓: Statistically significantly higher / lower than the previous wave at a 95% confidence level
Source: Wine Intelligence, Vinitrac® US, May 2019 - June 2023 (n≥1,008) drinkers of sparkling wine in the US

Sparkling wine brand consideration

The picture is mostly stable in terms of brand consideration, with a few notable exceptions: a significant decrease for Cupcake but a strong increase for Tosti

Brand consideration: Top 30

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

Ranking '23		2019 (n=2,000)	2022 (n=1,008)	2023 (n=1,043)	Tracking vs. '19	Tracking vs. '22
1	Moët & Chandon	64%	58%	66%	→	↑
2	Josh Cellars	n/a	55%	64%	n/a	↑
3	Veuve Clicquot	62%	56%	63%	→	→
4=	Cupcake	68%	64%	61%	↓	→
4=	Barefoot Bubbly	66%	63%	61%	→	→
6=	Yellow Tail	63%	59%	60%	→	→
6=	Dom Pérignon	56%	59%	60%	→	→
8	Korbel	59%	54%	59%	→	→
9=	La Marca	56%	56%	58%	→	→
9=	Tosti	43%	45%	58%	↑	↑
11=	Martini	53%	53%	57%	→	→
11=	Santa Margherita	48%	49%	57%	→	→
13	J Vineyards	48%	59%	56%	→	→
14	Domaine Ste. Michelle	n/a	46%	55%	n/a	→
15=	BABE	n/a	51%	54%	n/a	→

Ranking '23		2019 (n=2,000)	2022 (n=1,008)	2023 (n=1,043)	Tracking vs. '19	Tracking vs. '22
15=	Luc Belaire	n/a	45%	54%	n/a	→
15=	Nicolas Feuillatte	n/a	46%	54%	n/a	→
15=	Gloria Ferrer	47%	n/a	54%	→	n/a
15=	Chandon	53%	53%	54%	→	→
20=	Mumm Napa	57%	47%	53%	→	→
20=	Verdi	50%	51%	53%	→	→
20=	Schramsberg	50%	48%	53%	→	→
23=	J. Roget	40%	39%	52%	↑	↑
23=	Henkell	41%	55%	52%	↑	→
23=	Cook's	47%	50%	52%	→	→
26=	Ballatore	50%	51%	51%	→	→
26=	Freixenet	50%	45%	51%	→	→
28=	Ruffino	45%	48%	50%	→	→
28=	Perrier-jouët	51%	48%	50%	→	→
28=	Taittinger	51%	49%	50%	→	→

Results for all brands tested available in the data table

= Represents equal rankings; n/a: brand not tested during this wave
↑ / ↓: Statistically significantly higher / lower than the previous wave at a 95% confidence level
Source: Wine Intelligence, Vinitrac® US, May 2019 - June 2023 (n≥1,008) drinkers of sparkling wine in the US

Sparkling wine brand affinity

Affinity scores are mostly stable, but there was a negative performance for Cupcake; Tosti and Henkell registered significant increases

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=2,000)	2022 (n=1,008)	2023 (n=1,043)	Tracking vs. '19	Tracking vs. '22
1=	Moët & Chandon	50%	49%	54%	→	→
1=	Yellow Tail	54%	56%	54%	→	→
1=	BABE	n/a	35%	54%	n/a	↑
1=	Barefoot Bubbly	60%	54%	54%	↓	→
5=	Cupcake	59%	57%	53%	↓	→
5=	Veuve Clicquot	50%	49%	53%	→	→
7	Josh Cellars	n/a	44%	52%	n/a	→
8=	Korbel	48%	45%	50%	→	→
8=	La Marca	43%	47%	50%	→	→
10	Tosti	34%	38%	49%	↑	→
11=	Martini	46%	44%	48%	→	→
11=	J Vineyards	36%	38%	48%	↑	→
13=	Santa Margherita	39%	35%	47%	→	↑
13=	Dom Pérignon	42%	44%	47%	→	→
15=	Henkell	28%	42%	46%	↑	→

Ranking '23		2019 (n=2,000)	2022 (n=1,008)	2023 (n=1,043)	Tracking vs. '19	Tracking vs. '22
15=	McBride Sisters	n/a	n/a	46%	n/a	n/a
17=	Luc Belaire	n/a	41%	45%	n/a	→
17=	Freixenet	39%	45%	45%	→	→
17=	Riunite	n/a	39%	45%	n/a	→
20	André	42%	40%	44%	→	→
21=	Schramsberg	41%	45%	43%	→	→
21=	Gloria Ferrer	32%	n/a	43%	↑	n/a
21=	Chandon	39%	47%	43%	→	→
24=	Mionetto	30%	28%	42%	↑	↑
24=	Mumm Napa	46%	47%	42%	→	→
24=	Segura Viudas	35%	30%	42%	→	→
24=	Ballatore	34%	38%	42%	↑	→
28=	Veuve du Vernay	n/a	34%	41%	n/a	→
28=	Verdi	41%	41%	41%	→	→
30=	Zonin	31%	33%	41%	→	→

Results for all brands tested available in the data table

= Represents equal rankings; n/a: brand not tested during this wave
↑ / ↓: Statistically significantly higher / lower than the previous wave at a 95% confidence level
Source: Wine Intelligence, Vinitrac® US, May 2019 - June 2023 (n≥1,008) drinkers of sparkling wine in the US

Sparkling wine brand recommendation

A stable picture in brand recommendation, with Henkell showing a notable improvement

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=2,000)	2022 (n=1,008)	2023 (n=1,043)	Tracking vs. '19	Tracking vs. '22
1	Dom Pérignon	48%	51%	53%	→	→
2	Moët & Chandon	50%	46%	52%	→	→
3=	Barefoot Bubbly	51%	52%	51%	→	→
3=	Veuve Clicquot	55%	46%	51%	→	→
5	BABE	n/a	42%	49%	n/a	→
6=	Yellow Tail	47%	49%	47%	→	→
6=	Argyle	n/a	41%	47%	n/a	→
6=	Cupcake	50%	53%	47%	→	→
6=	Korbel	45%	41%	47%	→	→
6=	Luc Belaire	n/a	46%	47%	n/a	→
6=	Gloria Ferrer	30%	n/a	47%	↑	n/a
12	Schramsberg	40%	40%	46%	→	→
13=	Josh Cellars	n/a	46%	45%	n/a	→
13=	Martini	43%	43%	45%	→	→
15=	Henkell	20%	44%	44%	↑	→

Ranking '23		2019 (n=2,000)	2022 (n=1,008)	2023 (n=1,043)	Tracking vs. '19	Tracking vs. '22
15=	La Marca	43%	42%	44%	→	→
15=	Segura Viudas	34%	31%	44%	→	→
18	Mumm Napa	43%	41%	43%	→	→
19=	Verdi	34%	33%	42%	↑	↑
19=	Santa Margherita	38%	36%	42%	→	→
19=	Tosti	33%	34%	42%	→	→
19=	Nicolas Feuillatte	n/a	32%	42%	n/a	→
23=	Veuve du Vernay	n/a	29%	41%	n/a	↑
23=	Piper-heidsieck	39%	26%	41%	→	↑
23=	Scharffenberger	32%	33%	41%	→	→
26=	Freixenet	39%	37%	40%	→	→
26=	Chandon	35%	40%	40%	→	→
26=	Domaine Ste. Michelle	n/a	33%	40%	n/a	→
29=	McBride Sisters	n/a	n/a	39%	n/a	n/a
29=	G.H. Mumm	36%	46%	39%	→	→

Results for all brands tested available in the data table

= Represents equal rankings; n/a: brand not tested during this wave
↑ / ↓: Statistically significantly higher / lower than the previous wave at a 95% confidence level
Source: Wine Intelligence, Vinitrac® US, May 2019 - June 2023 (n≥1,008) drinkers of sparkling wine in the US

Sparkling wine brand most often bought

Most brands have similar 'most often bought' scores to last year, except for negative outlooks for Barefoot, Korbel, Chandon and Cook's

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=1,008)	2023 (n=1,043)	Tracking vs. '22
1	Barefoot Bubbly	49%	38%	↓
2	André	28%	37%	→
3=	Martini	35%	35%	→
3=	Yellow Tail	40%	35%	→
5=	La Marca	31%	32%	→
5=	Cupcake	41%	32%	→
5=	Moët & Chandon	31%	32%	→
5=	Dom Pérignon	26%	32%	→
9	Henkell	35%	29%	→
10	Korbel	44%	28%	↓
11	Veuve Clicquot	25%	27%	→
12	Verdi	30%	26%	→
13	McBride Sisters	n/a	25%	n/a
14=	Josh Cellars	26%	24%	→
14=	Freixenet	33%	24%	→
16=	Gloria Ferrer	n/a	23%	n/a
16=	BABE	27%	23%	→
16=	Riunite	34%	23%	→
19=	Gruet	18%	22%	→
19=	Tosti	30%	22%	→
21	Campo Viejo	24%	20%	→
22	Santa Margherita	13%	19%	→
23	Argyle	20%	18%	→
24=	Ruffino	12%	17%	→
24=	Chandon	31%	17%	↓
24=	Heidsieck Co Monopole	11%	17%	→
27	Krug	19%	16%	→
28=	Scharffenberger	18%	15%	→
28=	Mumm Napa	19%	15%	→
28=	Cook's	33%	15%	↓

Results for all brands tested available in the data table

2019 tracking not available due to methodology change
= 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® US, May 2019 - June 2023 (n≥1,008) drinkers of sparkling wine in the US

Research Methodology

Sparkling Wine in the US Market

2023

Research methodology

QUANTITATIVE

The data was collected in the US since March 2017

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

- 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**
- Invalid respondents (those who sped through the survey or gave inconsistent answers to selected questions) were removed before analysis
- The survey was quota-based and post-weighted to be representative of US alcohol drinkers and sparkling wine drinkers in terms of age, gender***, US divisions and annual pre-tax household income
- Income quota was introduced from 2022 onwards
- The distribution of the sample is shown in the table:

		Mar-17	May-18	May-19	Jun+Jul-20	Jun-21	Jun-22	Jun-23
	n =	1,465	2,200	2,000	1,020	1,414	1,008	1,043
Gender	Male	44%	47%	47%	49%	50%	49%	52%
	Female	56%	53%	53%	51%	50%	50%	47%
	Total	*100%*	*100%*	*100%*	*100%*	*100%*	*99%*	*99%*
Age	21-24	10%	12%	12%	7%	7%	7%	7%
	25-34	24%	26%	26%	28%	28%	28%	28%
	35-44	14%	19%	19%	22%	22%	22%	22%
	45-54	16%	17%	17%	13%	13%	13%	16%
	55-64	19%	13%	13%	13%	13%	13%	16%
	65 and over	18%	14%	14%	17%	17%	17%	11%
	Total	*100%*	*100%*	*100%*	*100%*	*100%*	*100%*	*100%*
US Divisions	New England	8%	6%	6%	4%	5%	4%	5%
	Middle Atlantic	16%	15%	15%	17%	17%	17%	13%
	East North Central	10%	14%	14%	11%	11%	11%	13%
	West North Central	7%	6%	6%	6%	6%	6%	4%
	South Atlantic	18%	16%	16%	19%	19%	19%	18%
	East South Central	3%	5%	5%	4%	4%	4%	3%
	West South Central	8%	9%	9%	11%	11%	11%	11%
	Mountain	4%	6%	6%	7%	7%	7%	8%
	Pacific	25%	24%	24%	20%	20%	20%	23%
	Total	*100%*	*100%*	*100%*	*100%*	*100%*	*100%*	*100%*
Annual household income before taxes	Under $50,000	n/a	n/a	n/a	n/a	n/a	35%	19%
	$50,000 - $99,999	n/a	n/a	n/a	n/a	n/a	35%	31%
	$100,000+	n/a	n/a	n/a	n/a	n/a	28%	49%
	Prefer not to answer	n/a	n/a	n/a	n/a	n/a	2%	2%
	Total	n/a	n/a	n/a	n/a	n/a	*100%*	*100%*

Source: Wine Intelligence, Vinitrac® US, March 2017 - June 2023 (n≥1,008) drinkers of sparkling wine in the US

** Methodology changes / new criteria from 2018 sparkling wave*
*** 50% of data from June 2020, 50% from July 2020 - Two data collection dates to reduce impact of any timing issues surrounding coronavirus lockdowns*
**** 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**
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	

Brand Power Index

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