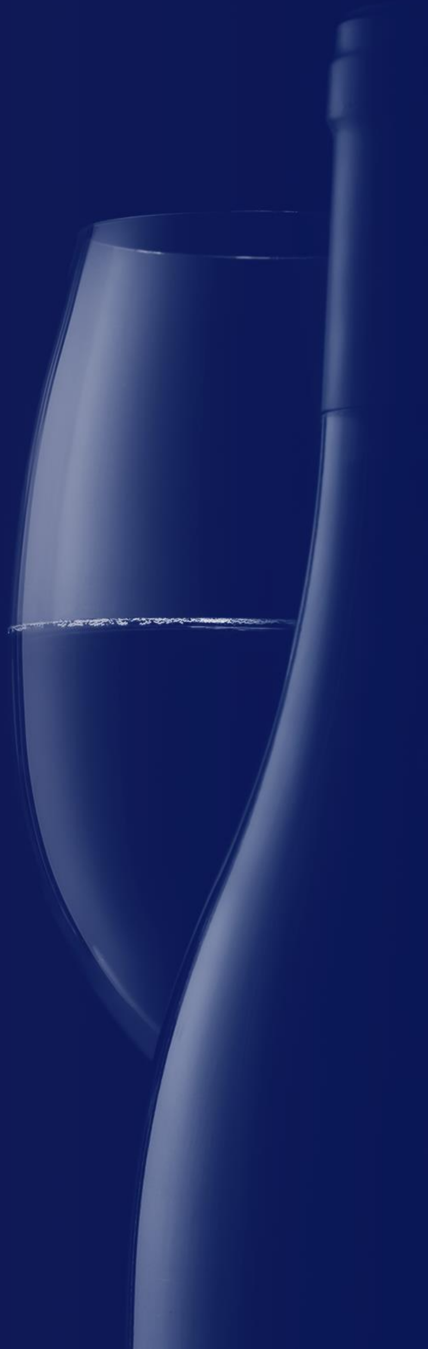
IWSR drinks market analysis

United States

Wine Landscapes 2024



Contents

IWSR Viewpoint

Stable growth in the number of regular wine drinkers, coupled with ongoing moderation, contributed to making 2023 a challenging year for the US wine industry.

Growth in the regular and weekly wine drinking populations are in line with overall growth in the US population. However, IWSR has noticed difficulty for wine in recruiting younger LDA+ drinkers, with Gen Z accounting for only 7% of the US regular wine drinkers (RWDs) – vs 36% of Boomers – while their interest in other beverages continues to grow. This means that the demographic make-up of regular wine drinkers is ageing.

Furthermore, the moderation trend, particularly prevalent among younger people, is leading to lower drinking frequency levels and volumes across the board.

Millennials are most involved in the wine category, with an improving financial outlook and a continued willingness to spend more on wine. Despite that, their wine consumption has also moderated, and their category loyalty has been insufficient to offset overall decline.

Improving economic conditions are reflected in partial recovery of consumer sentiment. The picture remains mixed though, as economic pressure is pushing many to re-evaluate their spending by prioritising essentials over wine.

Following the pandemic, regular wine drinkers returned to the on-premise – though insufficiently to allow for a full recovery of the sector. Last year, however, even that stalled as consumers dialled back on casual drinking occasions and showed an increased preference for at-home consumption.

IWSR's volume and value data shows year-on-year decreases of 1.5% and 0.5% respectively. In previous years, premiumisation was able to offset volume declines but that is no longer the case.

IWSR is forecasting further volume decline of 2.3% (CAGR 2022–27) – compounded by inflated inventory levels in distribution and retail – and further challenges lie ahead for wine in the US.

Sparkling wine had been a relative bright spot in the category, bucking the broader category decline to post a CAGR of 6.3% CAGR over the previous five years, driven by strong growth in Prosecco and Champagne. However, in 2023, this growth softened, and sparkling wine posted year-on-year volume and value declines, suggesting the sub-category may have plateaued.

Opportunities

- Millennial involvement driving the category.
- Increased income of RWDs leaves space for spending on premium and innovative wines.

Threats

- Ongoing volume decrease for still wine.
- Continued moderation.
- Challenges recruiting Gen Z wine drinkers.
- Some decreases in on-premise spending.
- Increased competition from spirits and RTDs.

Management Summary

Key takeaways

1. Recruitment in-line with population growth
2. Ageing regular wine drinkers driving lower involvement
3. Decline of Generation Treaters
4. Mixed consumer sentiment
5. On-premise visits flatline
6. Slower premiumisation amid challenges

1. Recruitment in-line with population growth

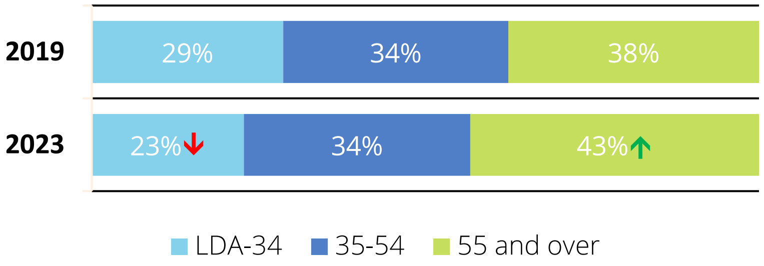
Growth in numbers of regular and weekly wine drinkers is in line with population increases

1 Adults aged 21+, US Census Bureau, population estimates
2 IWSR online calibration studies, October 2018, recalibrated to Census Bureau population data
3 IWSR online calibration studies, rolling average of 2022 and 2023, (n=15,709) US adults,21+. Wine=still light wine (red, white, rosé)
4 IWSR, Vinitrac® US, October 2018 and July/October 2023, (n≥4,033) US regular wine drinkers

2. Ageing RWDs driving lower involvement

The proportion of regular wine drinkers aged 55 or over has expanded, with younger drinkers in decline. They tend to be less involved in wine and the shift explains the increasing knowledge levels observed

Age Grouping



Wine knowledge index: Tracking[1]

Wine knowledge index is the 'objective' measurement of consumer knowledge about wine

	2019 (n=7,002)	2022 (n=8,057)	2023 (n=4,033)	Tracking vs. '19	Tracking vs. '22
Knowledge Index	27.5	26.5	28.2	↑	↑

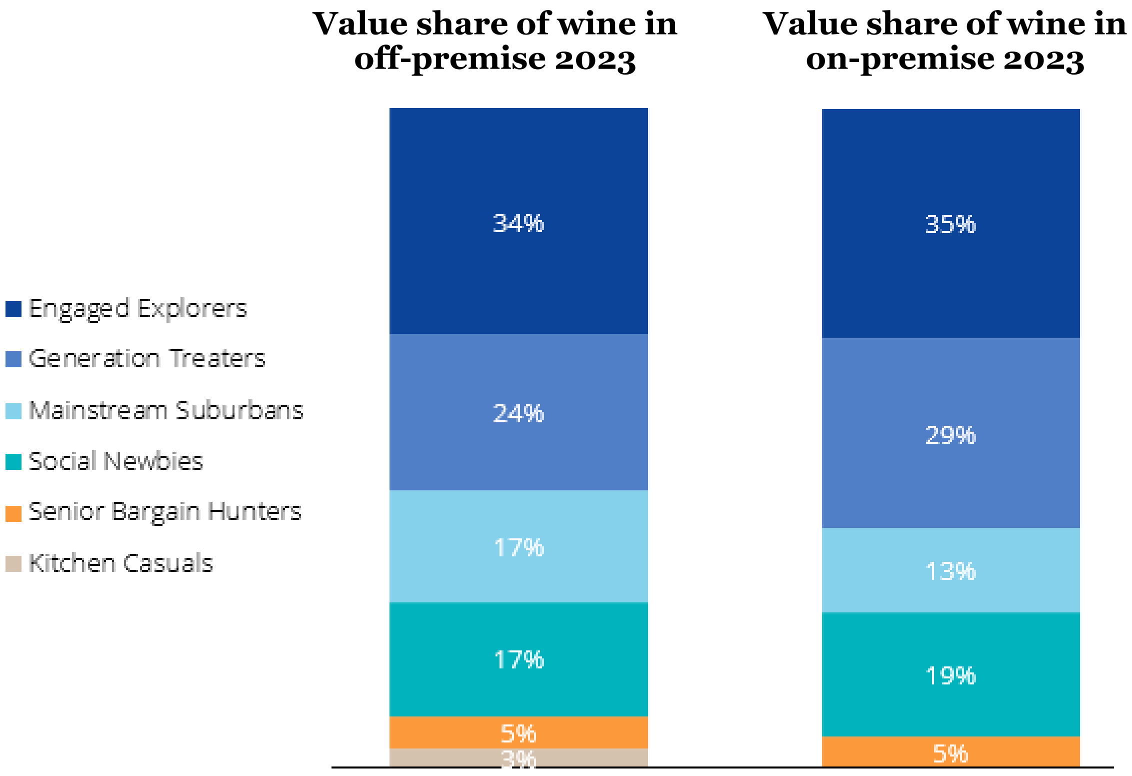
Wine involvement by generation in 2023

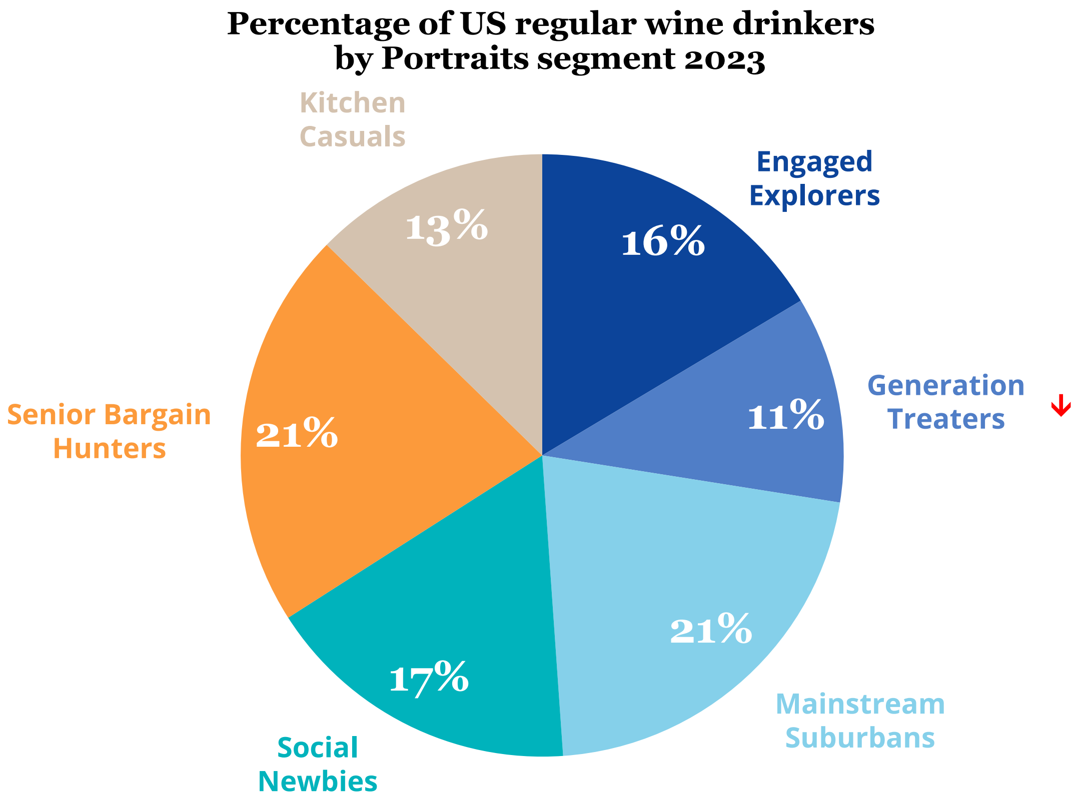
	All US Regular Wine Drinkers (n=4,033)	Gen Z LDA-26 (n=262)	Millennials 27-42 (n=1,232)	Gen X 43-58 (n=1,075)	Boomers 59+ (n=1,464)
High involvement	30%	33%	44%	30%	18%
Medium involvement	53%	52%	44%	55%	59%
Low involvement	17%	15%	11%	15%	23%

[1]Wine knowledge index (0–100) is calculated based on consumer-reported awareness of wine-producing countries, wine-growing regions and wine brands.
Base: All US regular wine drinkers (n≥4,033);
↑/↓: Statistically significantly higher/lower than the previous wave(s) at a 95% confidence level; %/%: Statistically significantly higher/lower than all regular wine drinkers at a 95% confidence level
Source: IWSR, Vinitrac® US, July/October 2019, October/November 2022 and July/October 2023 (n≥4,033), US regular wine drinkers

3. Decline of Generation Treaters

The proportion of Generation Treaters has decreased since 2022. These are typically high spenders, drink more wine and enjoy drinking in the on-premise

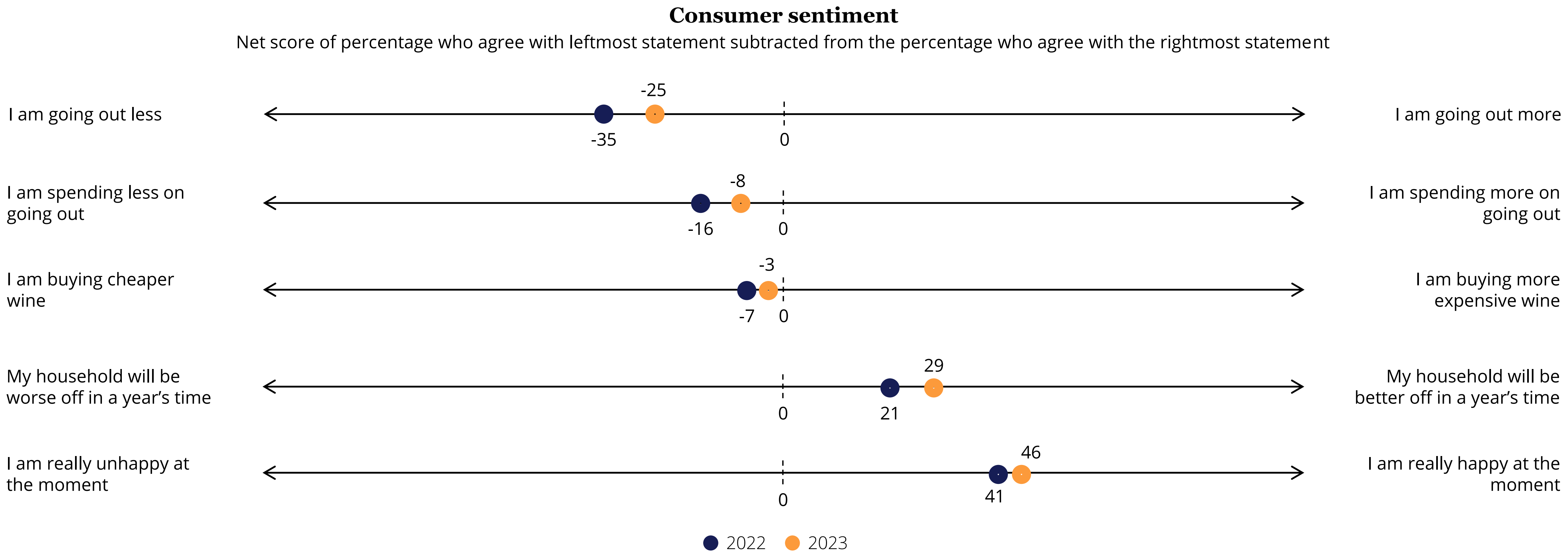




Base: All US regular wine drinkers (n≥4,033)
↑/↓: Statistically significantly higher/lower than the October 2022 at a 95% confidence level;
Source: IWSR, Vinitrac® US, July/October 2023 (n=4,033), US regular wine drinkers

4. Mixed consumer sentiment

Improvements in consumer sentiment have not led to higher spending on wine. Though regular wine drinkers are also cutting back on going out, there could be opportunities in linking wine with happiness and celebrations



Base: All US regular wine drinkers (n≥4,033)
Source: IWSR, Vinitrac® US, October/November 2022 and July/October 2023 (n≥4,033), US regular wine drinkers

5. On-premise visits flatline

The return of regular wine drinkers to the on-premise at a greater frequency than before the pandemic hasn't eased the category's woes. Lower typical spend on casual occasions reflects financial restraint

On-premise: Wine consumption frequency by occasion

Those who buy wine in the on-premise

	2019	2022	2023	Tracking vs. '19	Tracking vs. '22
A relaxing drink out at the end of the day	4.30	5.09	5.20	↑	→
With an informal meal in a pub / bar / restaurant	2.65	2.99	2.90	↑	→
With a more formal dinner in a restaurant	2.41	2.82	2.64	↑	↓
At a party / celebration / big night out	2.14	2.40	2.35	↑	→

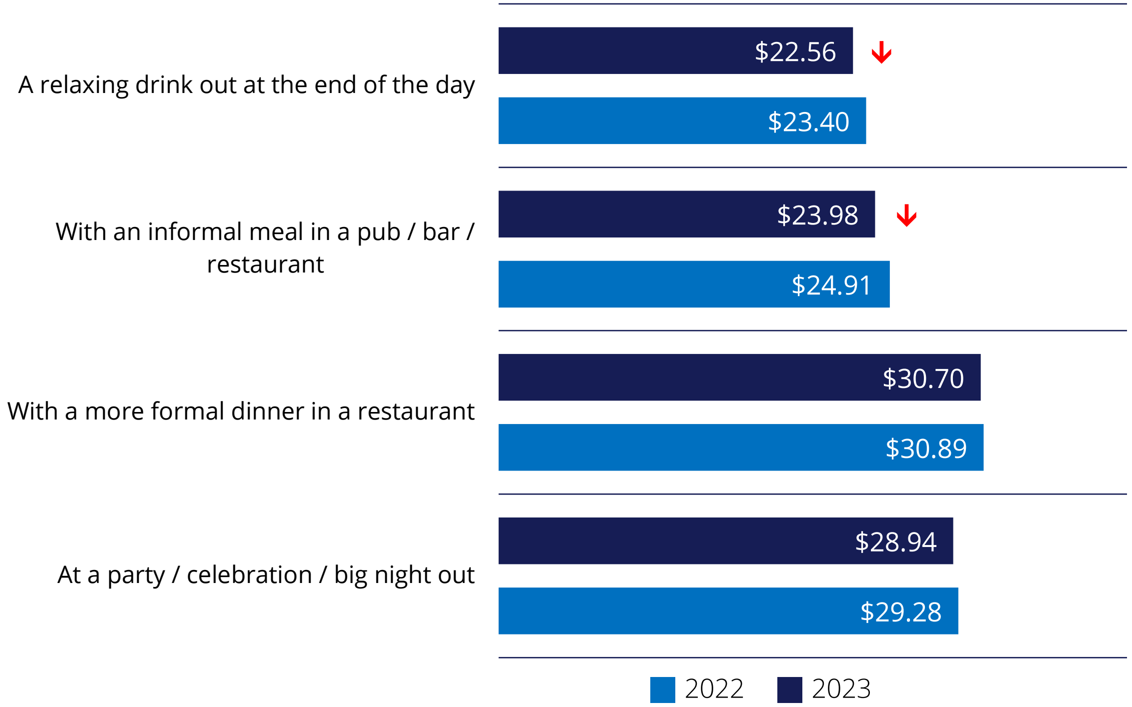
Wine purchase in on-premise: by generation

Percentage who buy wine in a bar, pub or restaurant

	All US Regular Wine Drinkers (n=4,033)	Gen Z LDA-26 (n=262)	Millennials 27-42 (n=1,232)	Gen X 43-58 (n=1,075)	Boomers 59+ (n=1,464)
Bar or pub	57%	55%	69%	55%	47%
Restaurant	86%	88%	88%	85%	84%
On-trade drinkers	88%	92%	93%	87%	84%

On-premise: Typical spend per bottle by occasion

Those who buy wine in the on-premise



Base: All US regular wine drinkers (n≥4,033); Base: Those who buy wine in the on-premise

↑/↓: Statistically significantly higher/lower than the previous wave(s) at a 95% confidence level; %/%: Statistically significantly higher/lower than all regular wine drinkers at a 95% confidence level

Source: IWSR, Vinitrac® US, July/October 2019, October/November 2022 and July/October 2023, (n≥4,033), US regular wine drinkers

6. Slower premiumisation amid challenges

Though US regular wine drinkers appear to be continuing to trade-up in still wine, the trend hasn't been able to mitigate wider value losses in the category

Still wine by price band

000s 9-litre cases

	2021	2022	CAGR 17-22	CAGR F 22-27
Low-Price (under $3.00)	33,056	31,241	-2.9%	-9.1%
Value (between $3.00 and $4.99)	59,804	57,290	-3.5%	-7.5%
Standard (between $5.00 and $9.49)	106,853	102,527	-3.9%	-4.1%
Premium (between $9.50 and $14.99)	71,967	70,654	0.5%	0.2%
Super Premium (between $15.00 and $24.99)	23,955	24,834	4.2%	5.4%
Ultra Premium (between $25.00 and $49.99)	4,962	4,908	2.9%	3.0%
Prestige (between $50.00 and $99.99)	5,300	5,386	3.1%	1.6%
Prestige Plus (over $100.00)	210	215	3.0%	2.6%

Total wine by value

US$000: Fixed Exchange with Tax

	2021	2022	CAGR 21-22	CAGR F 22-27
Total Wine	$43,725,749	$43,505,887	-0.5%	0.1%
Still Wine	$35,244,263	$35,101,048	-0.4%	-0.3%
Sparkling Wine	$7,377,994	$7,311,625	-0.9%	1.7%
Other Wines	$553,606	$526,662	-4.9%	1.0%
Fortified Wine	$337,935	$352,415	4.3%	1.1%
Light Aperitifs	$211,952	$214,137	1.0%	1.8%

Market context

"As baby boomers enter retirement with secure income levels, trading up is still prevalent within core wine consumers."

"Growth in premium-and-above segments will not be able to offset losses in standard-and-below due to the latter's bigger scale."

Executive Summary Report 2023, US

Source: IWSR

Management summary: tracking metrics

California remains the top choice, but there is a growing interest in European regions. Top wine brands have higher purchasing levels among regular wine drinkers than before the pandemic

Top alcoholic beverages

Percentage who have drunk the following beverages in the past 12 months

	2019	2023	Tracking
Red wine	77%	78%	→
White wine	72%	71%	→
Beer	60%	60%	→
Vodka	45%	47%	↑
Whisky / Whiskey	37%	41%	↑

Top country of origin

Percentage who have drunk wine from the following places in the past six months

	2019	2023	Tracking
California (USA)	65%	69%	↑
Italy	37%	38%	→
France	31%	31%	→
Other USA	29%	29%	→
Spain	19%	18%	→

Top region of origin

Percentage who have drunk wine from the following regions in the past six months

	2019	2023	Tracking
Napa Valley	41%	41%	→
Sonoma	20%	19%	→
Tuscany	13%	15%	↑
Champagne	11%	13%	↑
Prosecco	10%	11%	↑

Top wine brands

Percentage who have bought the following brands in the past three months

	2019	2023	Tracking
Barefoot	26%	30%	↑
Yellow Tail	23%	23%	→
Sutter Home	15%	19%	↑
Cupcake	12%	14%	↑
Josh Cellars	7%	14%	↑

Base: All US regular wine drinkers (n≥4,033)
↑/↓: Statistically significantly higher/lower than the previous wave(s) at a 95% confidence level
Source: IWSR, Vinitrac® US, July/October 2019 and July/October 2023 (n≥4,033), US regular wine drinkers

Management summary: tracking metrics

Leading retailers have consolidated their positions and regular wine drinkers have increasingly turned to superstores as destinations that have competitive pricing and promotions

Top red varietals

Percentage who have drunk the following varietals in the past six months

	2019	2023	Tracking
Merlot	51%	51%	→
Cabernet Sauvignon	46%	47%	→
Pinot Noir	43%	43%	→
Red blend	34%	36%	↑
Zinfandel	32%	32%	→

Top wine-buying channels

Percentage who have bought wine from the following channels in the past six months

	2019	2023	Tracking
In a supermarket	50%	50%	→
In a liquor store	47%	49%	↑
In a super store	33%	38%	↑
In a club store	27%	28%	→
In a wine shop	25%	27%	↑

Top white varietals

Percentage who have drunk the following varietals in the past six months

	2019	2023	Tracking
Chardonnay	48%	48%	→
Pinot Grigio / Pinot Gris	42%	44%	→
Sauvignon Blanc	36%	39%	↑
Moscato	34%	36%	→
Riesling	29%	30%	→

Top wine-buying retailers

Percentage who mainly use the following retailers to buy wine

	2019	2023	Tracking
Walmart	28%	31%	↑
Total Wine & More	14%	18%	↑
Costco	17%	17%	→
Target	11%	13%	↑
Kroger	9%	13%	↑

Base: All US regular wine drinkers (n≥4,033)
↑/↓: Statistically significantly higher/lower than the previous wave(s) at a 95% confidence level
Source: IWSR, Vinitrac® US, July/October 2019 and July/October 2023 (n≥4,033), US regular wine drinkers

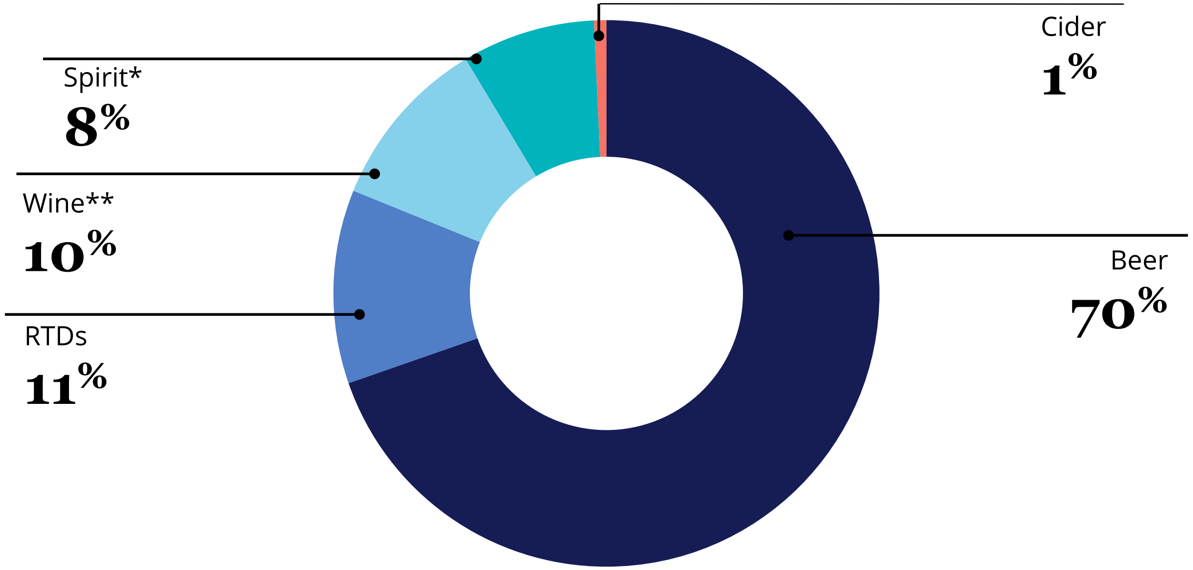
Market Data

Alcohol market share by category

Beer maintains market dominance despite a decline. In contrast, RTDs have shown growth since 2017 and are now the second biggest category by volume – and forecast to continue growing

Total beverage alcohol market share by category

Percentage 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	3,427,107	-0.03%	-1.5%
Beer	2,457,747	2,387,763	-2.2%	-2.2%
RTDs	393,058	392,709	26.2%	0.9%
Wine	362,468	351,423	-1.3%	-2.3%
Spirits**	269,427	270,196	2.9%	1.6%
Cider	25,901	25,017	-1.6%	-2.6%

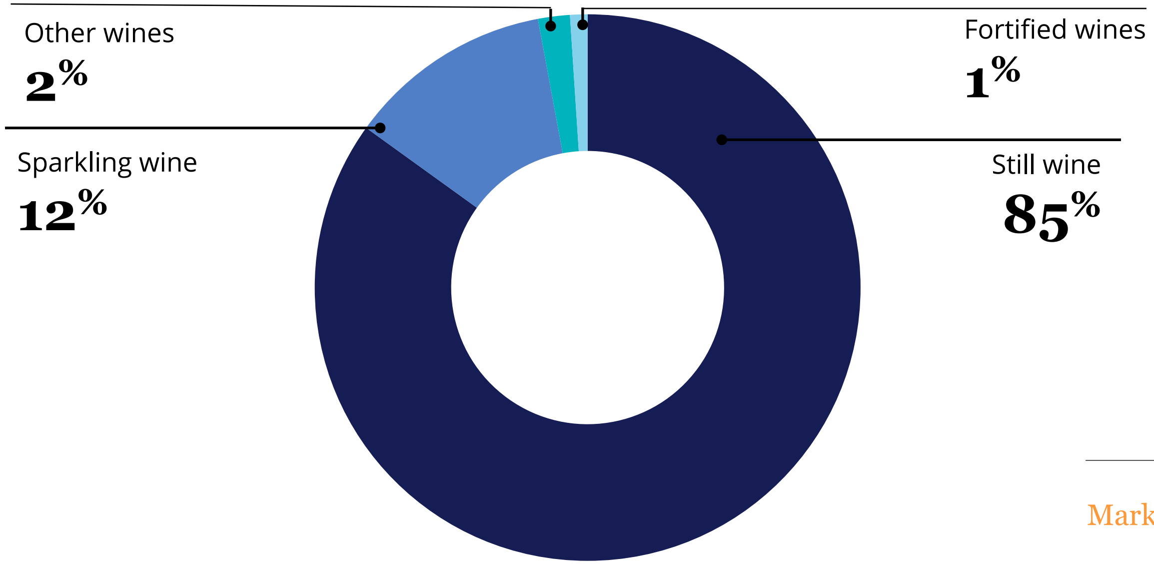
*Spirits includes whisky, gin and genever, vodka, agave-based spirits, national spirits and rum
**Wine includes still wine, sparkling wine, fortified wine and light aperitifs
Source: IWSR

Total wine market volumes

Still wine has experienced decline since 2017 and this is expected to continue in the future. Other wine segments are projected to grow until 2027 from smaller bases

Total wine share by category

Percentage of purchases that fall within the categories below



Total wine 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%

Market context

"Still wine volumes decreased in 2022 at a rate similar to before the pandemic, suggesting that the category has moved past recent years' volume fluctuations [...] [The on-premise] was hit by staff shortages, reduced wine offerings and less footfall as most offices are yet to fully return to work."

Executive Summary Report 2023, US

*Other Wines includes non-grape based wines
Source: IWSR

Still wine volumes by origin

The US wine market is driven by domestic consumption, accounting for 76% of the total, followed by Italian wine. There is consistent decline across most origins, with France and New Zealand bucking the trend

Total still wine volumes and market share by origin

000s 9-liter cases

		2021	2022	CAGR 17-22	CAGR F 22-27	Market Share
	Total	303,722	294,602	-2.0%	-2.9%	
1	US	229,287	222,646	-2.0%	-3.9%	76%
2	Italian	23,842	22,819	-2.7%	-0.7%	8%
3	French	12,707	12,664	1.6%	1.6%	4%
4	Australian	11,841	10,804	-6.1%	-2.1%	4%
5	New Zealand	9,090	9,533	6.2%	3.7%	3%
6	Chilean	5,614	5,207	-4.1%	-2.5%	2%
7	Argentinian	3,881	3,828	-6.0%	-1.0%	1%
8	Spanish	3,954	3,810	-3.2%	-0.3%	1%
9	Portuguese	1,747	1,721	1.9%	-0.9%	1%
10	German	1,759	1,571	-6.9%	-1.8%	1%

Source: IWSR

Still wine retail price by origin

Still wine's retail price is up across the board, though most notably for the US, in part pushed by inflation. There could be challenges ahead from inflated inventories and high domestic production

Historic and forecast growth: Retail price

Five-year CAGR % calculated using a variable exchange rate

		Retail price per 0.75l 2022 (US$)	CAGR 17-22	CAGR F 22-27
	Total	9.84	2.6%	2.7%
1	US	9.62	2.9%	3.2%
2	Italian	9.95	1.2%	1.0%
3	French	13.09	1.3%	1.3%
4	Australian	7.36	2.3%	0.4%
5	New Zealand	13.00	0.4%	0.4%
6	Chilean	8.65	0.4%	0.5%
7	Argentinian	10.98	1.7%	0.7%
8	Spanish	11.33	0.3%	0.9%
9	Portuguese	8.27	1.5%	0.2%
10	German	10.50	0.9%	0.1%

Market context

"Many wine companies have restructured their portfolios to become more premium."

"From a production standpoint, 2022 was a year of recovery in grape quality. Vines produced smaller grapes due to frost and/or drought in 2021. Yields are expected to be smaller in quantity but higher in quality."

Executive Summary Report 2023, US

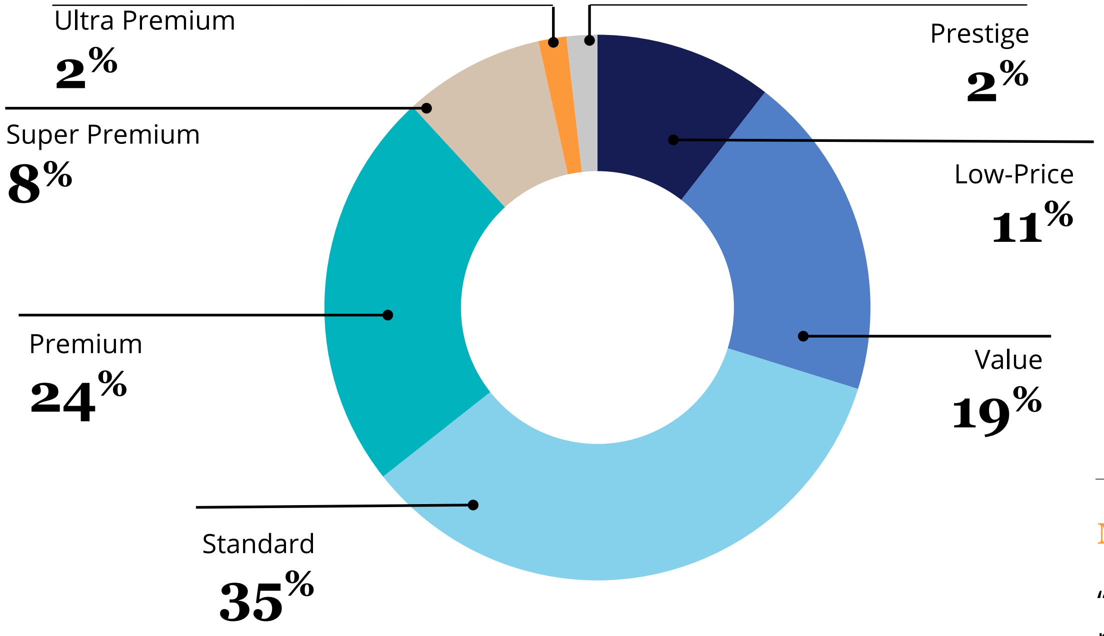
Source: IWSR

Still wine by price band

Decline for standard-and-below and growth for premium-and-above have continued, but volume growth in premium wine was unable to compensate for volume losses in other bands

Still wine by price band*

Percentage of purchases that fall within the categories below



*Prestige Plus omitted from pie chart due to small market share (less than 1%)
Source: IWSR

Still wine by price band

000s 9-litre cases

	2021	2022	CAGR 17-22	CAGR F 22-27
Low-Price (under $3.00)	33,056	31,241	-2.9%	-9.1%
Value (between $3.00 and $4.99)	59,804	57,290	-3.5%	-7.5%
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Prestige (between $50.00 and $99.99)	5,300	5,386	3.1%	1.6%
Prestige Plus (over $100.00)	210	215	3.0%	2.6%

Market context

"Achieving volume growth has been challenging for still wine, with the lion's share of volume resting in below-premium price segments."

"In previous years, demand was growing at US$10, which reduced the number of brands sitting within the US$10–US$14.99 band, making overall growth more challenging."

Executive Summary Report 2023, US

Still wine consumption per capita

The amount of still wine that US LDA+ consumers drink is declining and currently stands at slightly under 11 litres per year, highlighting challenges in recruitment into the category and ongoing moderation

Per capita consumption of still wine

Liters per annum (LDA+ population)

		2021	2022	CAGR 17-22	CAGR 21-22
1	St. Martin and St. Maarten	46.67	49.01	12.3%	5.0%
2	Portugal	43.00	45.71	-0.9%	6.3%
3	Montenegro	41.76	42.62	-0.9%	2.0%
4	Italy	42.16	39.95	-2.8%	-5.2%
5	Slovenia	37.63	37.82	-2.8%	0.5%
6	St. Barths	33.89	37.21	9.3%	9.8%
7	Switzerland	36.14	34.94	-1.5%	-3.3%
8	France	35.71	33.93	-5.2%	-5.0%
9	Greece	27.95	33.79	0.5%	20.9%
10	Hungary	31.52	32.65	0.6%	3.6%
11	Denmark	33.37	30.99	-1.2%	-7.1%
12	Austria	30.93	30.12	-1.3%	-2.6%
13	Turks and Caicos	27.56	30.08	-2.9%	9.2%
14	Romania	27.55	27.87	2.4%	1.2%
15	US Virgin Islands	27.78	27.86	-2.6%	0.3%
50	United States	11.10	10.68	-2.9%	-3.8%

Source: IWSR

Sparkling wine volumes by origin

Sparkling wine growth has subsided from its 2022 heights, with a year-on-year volume decrease. The category had a strong CAGR between 2017 and 2022, mainly benefitting Italian and French sparkling wines

Total sparkling wine volumes and market share by origin

000s 9-litre cases

		2021	2022	CAGR 17-22	CAGR F 22-27	Market Share
	Total	41,572	40,179	6.4%	0.6%	
1	Italian	20,898	20,196	10.4%	3.5%	50%
2	US	16,075	15,728	3.4%	-3.1%	39%
3	Spanish	2,128	1,983	-1.0%	-2.5%	5%
4	French	1,890	1,721	7.7%	-1.1%	4%
5	International*	201	204	3.4%	3.6%	1%
6	Argentinian	166	140	-7.5%	-7.8%	0%
7	German	105	92	-3.9%	-2.8%	0%
8	Australian	53	55	-7.4%	-0.4%	0%
9	South African	33	35	6.1%	4.2%	0%
10	New Zealand	24	27	13.6%	7.2%	0%

Market context

"The return of the on-premise in 2021, complemented by more events such as weddings and holiday gatherings, resulted in the most significant volume increase in recent memory, surpassing pre-pandemic gains. However, that level of growth was unsustainable in 2022 and sparkling wine volumes decreased."

"Prosecco continues to be a driving force, reaching new volume highs each year."

Executive Summary Report 2023, US

Sparkling wine includes all sparkling wine types except Champagne, and includes no/low sparkling wine types
*International refers to wine where grapes are from multiple countries of origin
Source: IWSR

Sparkling wine retail price by origin

Like still wine, the price of sparkling wine has been increasing. After Champagne, other French sparkling wines are the most expensive, followed by domestic products

Historic and forecast growth for sparkling wine: Retail price

Five-year CAGR % calculated using a variable exchange rate

		Retail price per 0.75l 2022 (US$)	CAGR 17-22	CAGR F 22-27
	Total	11.19	1.6%	1.0%
1	Italian	12.04	1.2%	0.5%
2	US	9.54	0.8%	1.4%
3	Spanish	10.13	0.3%	0.1%
4	French	18.09	4.7%	-0.3%
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%

Sparkling wine includes all sparkling wine types except Champagne, and includes no/low sparkling wine types
*International refers to wine where grapes are from multiple countries of origin
Source: IWSR

Market context

"Sparkling wine remains an affordable luxury for consumers looking to celebrate."

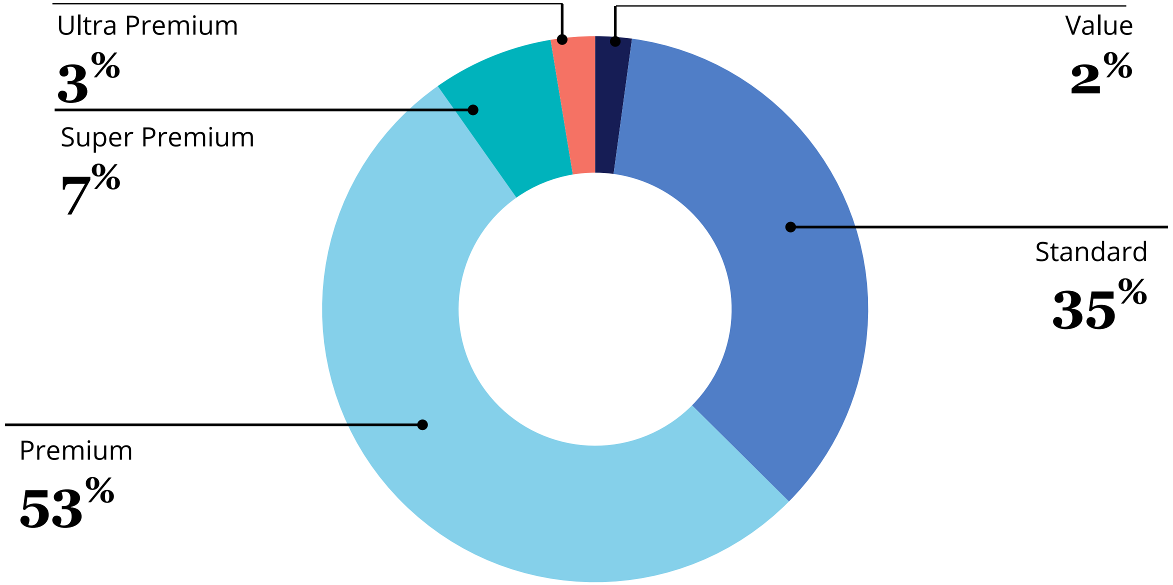
Executive Summary Report 2023, US

Sparkling wine by price band

Most sparkling wine sold in the US is in the premium category, which showed growth between 2017 and 2022 and is projected to continue increasing, while the standard-and-below category is in decline

Sparkling wine by price brand**

Percentage of purchases that fall within the categories below



Sparkling wine volumes by price band

000s 9-litre cases

	2021	2022	CAGR 17-22	CAGR F 22-27
Value (Under $5.00)	821	868	11.7%	4.7%
Standard (between $5.00 and $9.49)	14,776	14,189	1.9%	-5.1%
Premium (between $9.50 and $14.99)	21,958	21,227	10.2%	3.3%
Super Premium (between $15.00 and $24.99)	2,889	2,883	3.1%	2.6%
Ultra Premium (over $50.00)	1,144	1,049	14.9%	2.3%

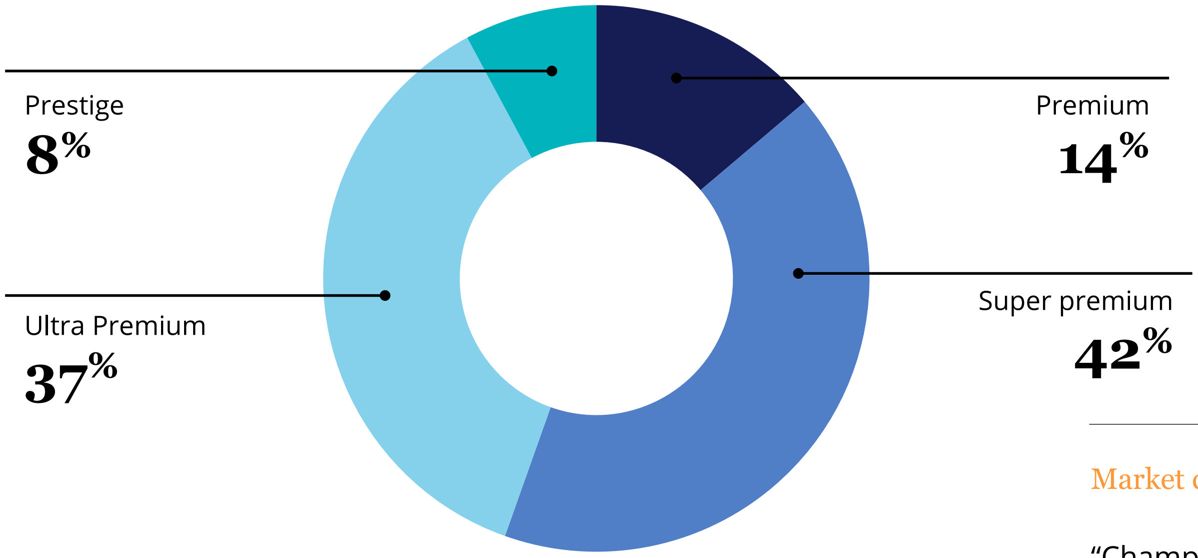
Sparkling wine includes all sparkling wine types except Champagne, and includes no/low sparkling wine types
Prestige omitted from pie chart due to small market share (less than 1%)
Source: IWSR

Champagne by price band

Champagne witnessed growth across all price bands between 2017 and 2022, and the upward trend is expected to continue. Most Champagne falls within the super-premium and ultra-premium segments

Champagne by price brand

Percentage of purchases that fall within the categories below



Champagne volumes by price band

000s 9-litre cases

	2021	2022	CAGR 17-22	CAGR F 22-27
Premium (under $40.00)	301.66	311.70	2.0%	3.3%
Super Premium (between $40.00 and $59.99)	973.90	938.75	4.9%	3.2%
Ultra Premium (between $60.00 and $99.99)	828.95	828.60	6.5%	1.6%
Prestige ($100.00 and over)	163.24	176.85	8.3%	0.6%

Market context

"Champagne shipments to the US saw a slight decline, but it remains Champagne's leading export market. The decline can partly be attributed to high global demand for Champagne in 2022 and difficulties in delivering adequate supplies to the US market. Some parts of the country still face supply and allocation issues, and a full recovery from the pandemic and suspended tariffs, especially in the on-premise, has not yet been achieved."

Executive Summary Report 2023, US

Prestige Plus omitted from charts due to small market share (less than 0.1%)
Source: IWSR

Sparkling wine consumption per capita

There was sustained growth in per capita consumption of sparkling wine between 2017 and 2021, followed by a downturn, which is forecast to continue

Per capita consumption of sparkling wine

Litres per annum (LDA+ population)

		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%
38	United States	1.59	1.53	5.3%	-4.0%

Sparkling wine includes Champagne
Source: IWSR

Market Demographics

US regular wine drinkers

Growth in numbers of regular and weekly wine drinkers is in line with population increases

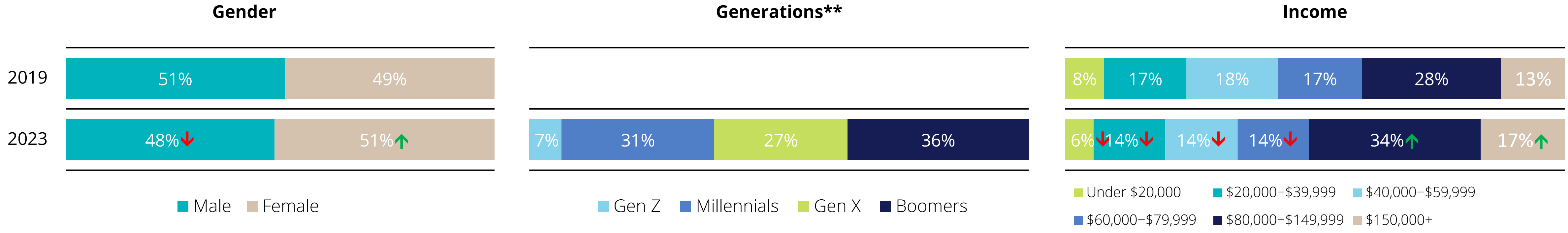
1 Adults aged 21+, US Census Bureau, population estimates
2 IWSR online calibration studies, October 2018, recalibrated to Census Bureau population data
3 IWSR online calibration studies, rolling average of 2022 and 2023, (n=15,709) US adults,21+. Wine=still light wine (red, white, rosé)
4 IWSR, Vinitrac® US, October 2018 and July/October 2023, (n≥4,033) US regular wine drinkers

Demographics

US regular wine drinkers are increasingly from higher-income brackets. Though this is welcome news, indicating strong economic resilience among these groups, it has not offset category-wide difficulties

Q US regular wine drinkers*: who are they?

All regular wine drinkers in US in 2023 compared with 2019 –



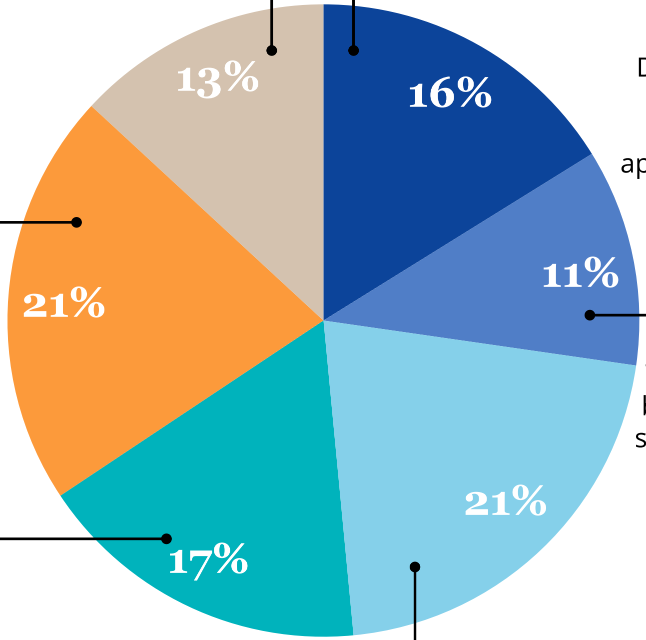
US Divisions

	2017	2023	Tracking		2017	2023	Tracking
South Atlantic	21%	20%	→	Mountain	7%	7%	→
Pacific	20%	18%	↓	West North Central	6%	6%	→
Middle Atlantic	15%	15%	→	New England	5%	5%	→
East North Central	11%	14%	↑	East South Central	4%	4%	→
West South Central	11%	10%	→				

Base: All US regular wine drinkers (n≥4,033);
↑/↓: Statistically significantly higher/lower than the previous wave(s) at a 95% confidence level
Source: IWSR, Vinitrac® US, July/October 2019 and July/October 2023 (n≥4,033), US regular wine drinkers
*Definition of regular wine drinkers: respondents who drink wine once a month. **Tracking not available for generations due to change to question

US Portraits: wine drinker segmentation

Percentage share of US regular wine drinkers by Portraits segments 2023



KITCHEN CASUALS
An older segment, they are infrequent and low-spending wine drinkers, with very few consuming wine in the on-premise. They show limited interest in the wine category, sticking to what they are familiar with, and typically buy wine for relaxation at home rather than a special occasion.

ENGAGED EXPLORERS
Primarily comprised of Millennials and Gen X wine drinkers, with a male bias, Engaged Explorers boast high annual household incomes. Distinguished by their elevated knowledge and confidence levels, this group are wine enthusiasts for whom the beverage is a vital component of their lifestyles. They are keen to explore new wines, appreciating the beverage to enhance special occasions, unwind at the end of the day or to complement food. Their expansive approach to the wine category explains both the frequency of their consumption of wine and their higher expenditure on it.

SENIOR BARGAIN HUNTERS
The oldest segment, they are the least frequent wine drinkers. Time in the category means they have reasonable wine knowledge but purchase from a narrow repertoire of countries and regions of origin and brands. Senior Bargain Hunters tend to stick to what they know and are strongly value-driven – which is why their go-to channel is supermarkets.

GENERATION TREATERS
The youngest segment, with the majority under 35 and a heavy male bias, they enjoy high household incomes. They are the most involved segment, although they exhibit the lowest knowledge base. Their lack of expertise hasn't hindered their confidence. They remain open to experimentation in their selections, and purchase more wine from more obscure countries, regions, and varietals. They are more sensitive to wine's perceived ability to make people appear sophisticated and fashionable.

SOCIAL NEWBIES
A younger segment, this group is now drinking wine typically on a weekly basis. They mostly drink wine at home and less frequently but are not afraid to spend when they do so. Wine is not fully integrated into their lifestyles and they have limited wine knowledge.

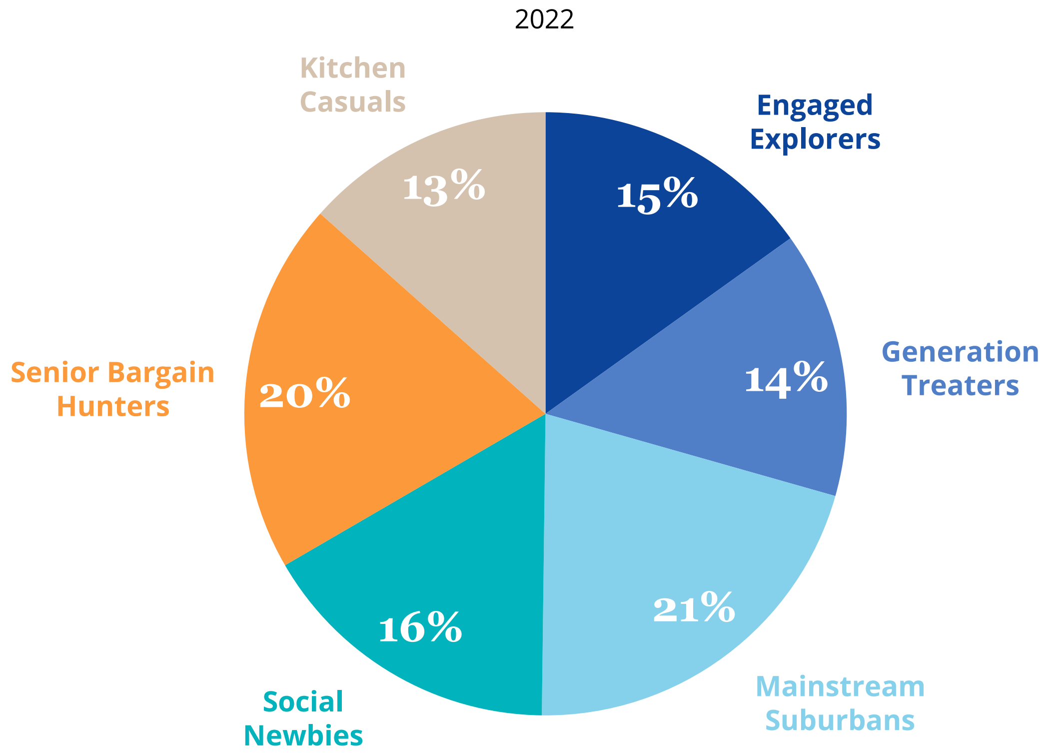
MAINSTREAM SUBURBANS
Mainstream Suburbans are primarily Gen X and Boomer wine enthusiasts, with a female bias. Boasting both high knowledge and confidence in the wine category, they are frequent consumers of still wine, favouring informal relaxing occasions, while exercising restraint in their spending.

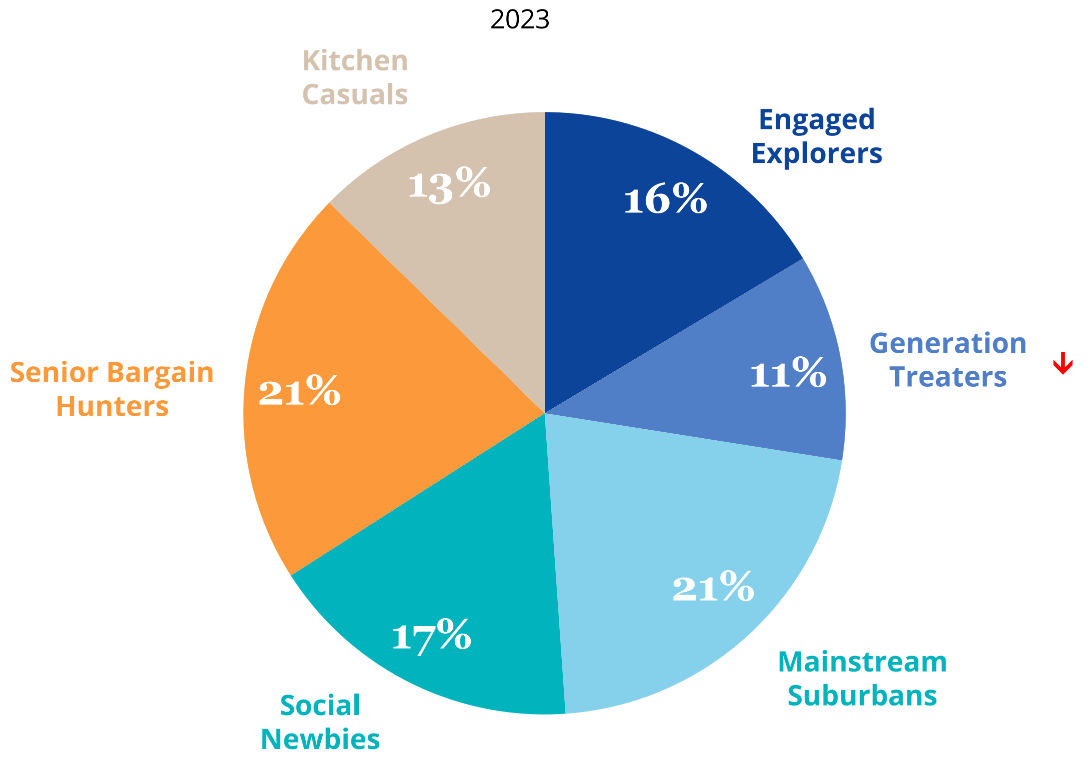
Source: IWSR, Vinitrac® US, July/October 2023 (n=4,033) US regular wine drinkers

US Portraits: wine drinker segmentation

There has been a decline in the proportion of RWDs who are Generation Treaters since 2022, in part due to an ageing demographic. Senior Bargain Hunters and Mainstream Suburbans are the largest segments

Percentage share of population of US regular wine drinkers by Portraits segments 2022 vs 2023

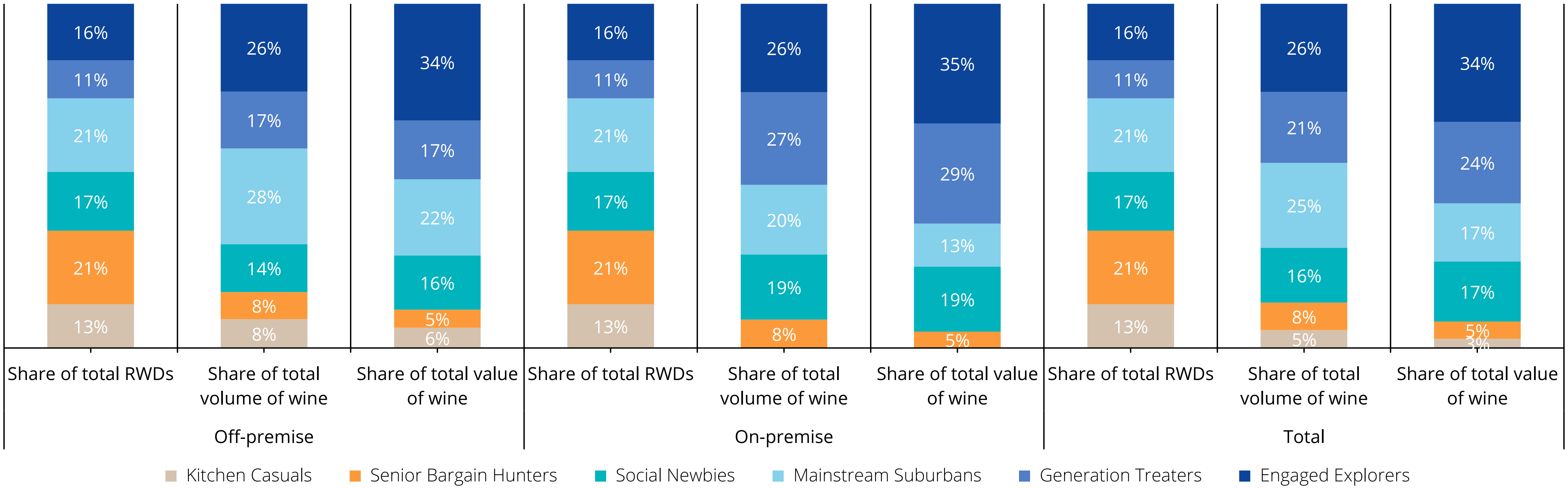




↑/↓: Statistically significantly higher/lower than the previous wave(s) at a 95% confidence level
Source: IWSR, Vinitrac® US, October/November 2022 and July/October 2023 (n≥4,033), US regular wine drinkers

US Portraits market sizing

Engaged Explorers and Generation Treaters account for 16% and 11% of RWDs respectively and drive much of the volume and most of the value consumed in the US. Generation Treaters are keen on-premise wine drinkers



Base: All US regular wine drinkers (n=4,033); Source: IWSR, Vinitrac® US, July/October 2023 (n=4,033), US regular wine drinkers.

Consumer Sentiment

Consumer sentiment: tracking

Despite an improvement in consumer sentiment, US regular wine drinkers continue to down-trade. Essentials are being prioritised over wine

Consumer sentiment: spending and wine

Net score of percentage who agree with leftmost statement subtracted from the percentage who agree with the rightmost statement

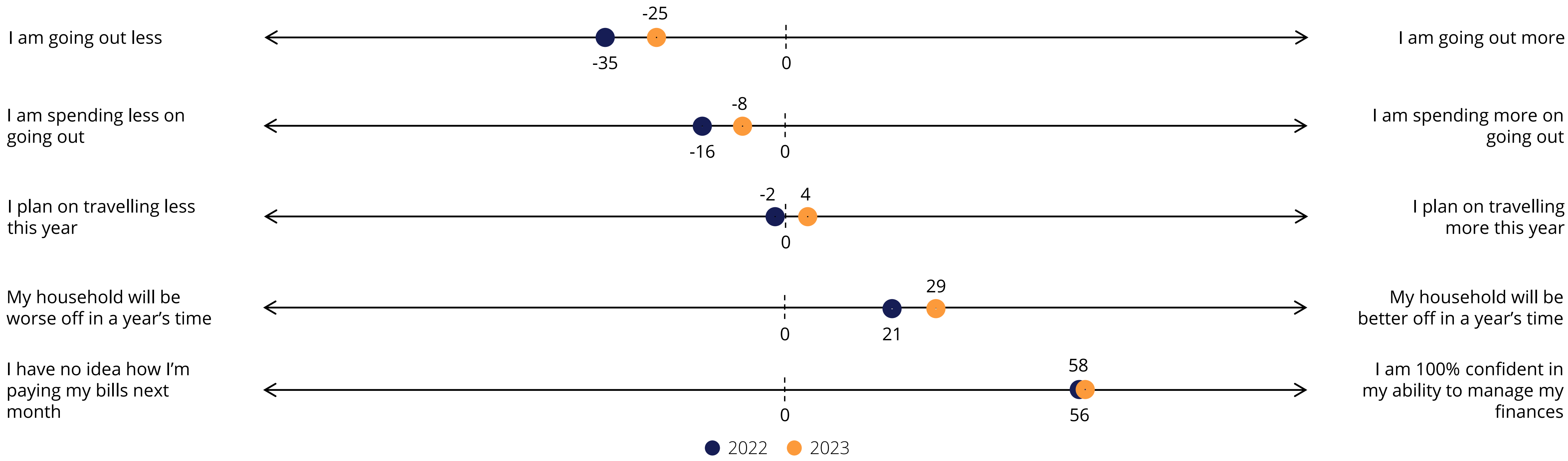
Base: All US regular wine drinkers (n≥4,033)
Source: IWSR, Vinitrac® US, October/November 2022 and July/October 2023 (n≥4,033), US regular wine drinkers

Consumer sentiment: tracking

Despite growing optimism, regular wine drinkers are going out less often and spending less when doing so

Consumer sentiment: general well-being, travel and socialising

Net score of percentage who agree with leftmost statement subtracted from the percentage who agree with the rightmost statement



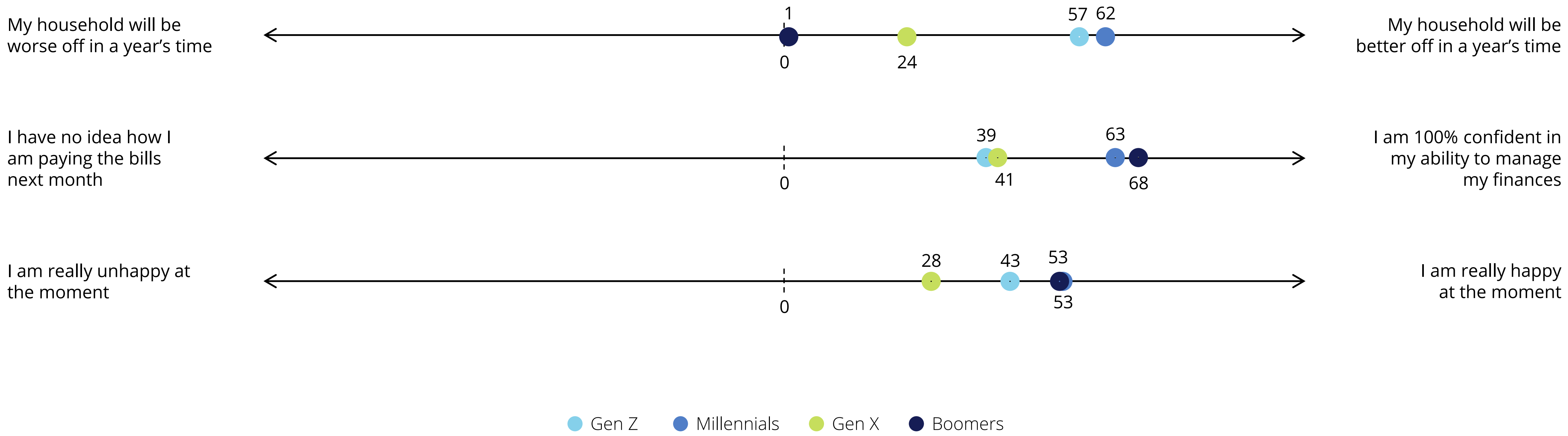
Base: All US regular wine drinkers (n≥4,033)
Source: IWSR, Vinitrac® US, October/November 2022 and July/October 2023 (n≥4,033), US regular wine drinkers

Consumer sentiment by generation

Younger age groups are most optimistic about the future. Millennial regular wine drinkers show a strongly positive sentiment across the board, explaining their high involvement in the category

Consumer sentiment: generations

Net score of percentage who agree with leftmost statement subtracted from the percentage who agree with the rightmost statement



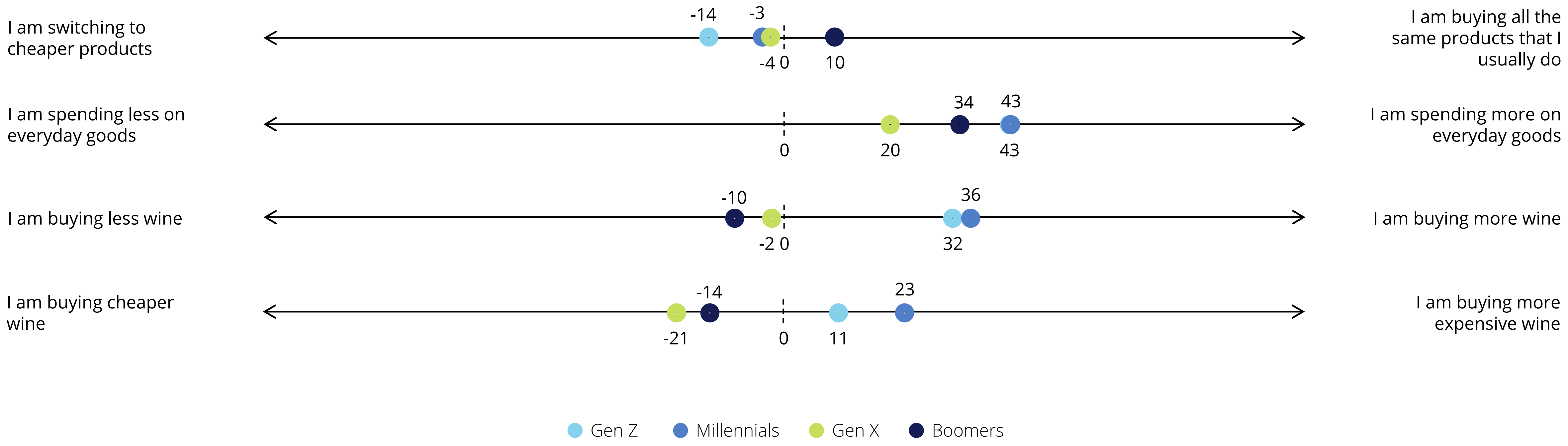
Base: All US regular wine drinkers (n=4,033)
Source: IWSR, Vinitrac® US, July/October 2023 (n=4,033), US regular wine drinkers

Consumer sentiment by generation

All age groups except Boomers are down-trading on products generally, to the detriment of wine. Younger people appear to be more economically resilient, as they claim to be buying more wine and spending more on it

Consumer sentiment: generations

Net score of percentage who agree with leftmost statement subtracted from the percentage who agree with the rightmost statement



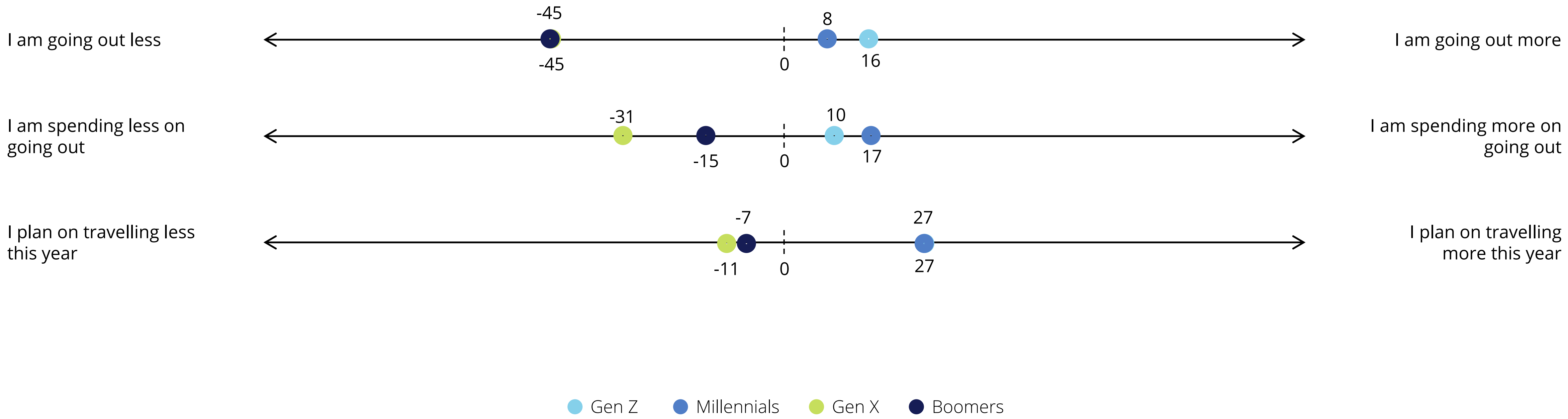
Base: All US regular wine drinkers (n=4,033)
Source: IWSR, Vinitrac® US, July/October 2023 (n=4,033), US regular wine drinkers

Consumer sentiment by Generation

Attitudes to travelling and going out are mixed. Younger regular wine drinkers are going out more and increasing their on-premise spending

Consumer sentiment: travel and socialising

Net score of percentage who agree with leftmost statement subtracted from the percentage who agree with the rightmost statement



Base: All US regular wine drinkers (n=4,033)
Source: IWSR, Vinitrac® US, July/October 2023 (n=4,033), US regular wine drinkers

Wine Views and Attitudes

Attitudes towards wine

Boomers are most likely to be loyal in their wine choices, while younger drinkers are more discovery-oriented. Gen Z is most price-sensitive

Attitudes towards wine: Tracking

Percentage who 'agree' or 'strongly agree' with the following statements

	2019 (n=7,002)	2022 (n=8,057)	2023 (n=4,033)	Tracking vs. '19	Tracking vs. '22
I enjoy trying new and different styles of wine on a regular basis	52%	58%	58%	↑	→
I don't mind what I buy so long as the price is right	24%	17%	15%	↓	↓
I know what I like and I tend to stick to what I know	24%	25%	26%	↑	→

Attitudes towards wine by generation

Percentage who 'agree' or 'strongly agree' with the following statements

	All US Regular Wine Drinkers (n=4,033)	Gen Z LDA-26 (n=262)	Millennials 27-42 (n=1,232)	Gen X 43-58 (n=1,075)	Boomers 59+ (n=1,464)
I enjoy trying new and different styles of wine on a regular basis	58%	65%	73%	60%	43%
I don't mind what I buy so long as the price is right	15%	23%	13%	18%	14%
I know what I like and I tend to stick to what I know	26%	12%	14%	22%	43%

Base: All US regular wine drinkers (n≥4,033)
↑/↓: Statistically significantly higher/lower than the previous wave(s) at a 95% confidence level; %/%: Statistically significantly higher/lower than all regular wine drinkers at a 95% confidence level
Source: IWSR, Vinitrac® US, July/October 2019, October/November 2022 and July/October 2023 (n≥4,033), US regular wine drinkers

Wine involvement

US regular wine drinkers are more involved with the category than in 2019, driven by Millennials

Wine involvement: Tracking

	2019 (n=7,002)	2022 (n=8,057)	2023 (n=4,033)	Tracking vs. '19	Tracking vs. '22
High involvement	24%	32%	30%	↑	→
Medium involvement	53%	51%	53%	→	→
Low involvement	23%	17%	17%	↓	→

Wine involvement by generation

	All US Regular Wine Drinkers (n=4,033)	Gen Z LDA-26 (n=262)	Millennials 27-42 (n=1,232)	Gen X 43-58 (n=1,075)	Boomers 59+ (n=1,464)
High involvement	30%	33%	44%	30%	18%
Medium involvement	53%	52%	44%	55%	59%
Low involvement	17%	15%	11%	15%	23%

Base: All US regular wine drinkers (n≥4,033)
↑/↓: Statistically significantly higher/lower than the previous wave(s) at a 95% confidence level; %/%: Statistically significantly higher/lower than all regular wine drinkers at a 95% confidence level
Source: IWSR, Vinitrac® US, July/October 2019, October/November 2022 and July/October 2023 (n≥4,033), US regular wine drinkers

Involvement and perceived expertise

Regular wine drinkers are more price sensitive than before the pandemic, and becoming increasingly so

Involvement and perceived expertise in wine: Tracking

Percentage who ‘agree’ or ‘strongly agree’ with the following statements

Ranking '23		2019 (n=7,002)	2022 (n=8,057)	2023 (n=4,033)	Tracking vs. '19	Tracking vs. '22
1	Drinking wine gives me pleasure	81%	87%	87%	↑	→
2	I always look for the best quality wines I can get for my budget	72%	77%	79%	↑	↑
3	Deciding which wine to buy is an important decision	63%	70%	70%	↑	→
4	I like to take my time when I purchase a bottle of wine	60%	68%	68%	↑	→
5	Generally speaking, wine is reasonably priced	60%	67%	66%	↑	→
6	I have a strong interest in wine	54%	61%	60%	↑	→
7	Wine is important to me in my lifestyle	49%	56%	54%	↑	↓
8	I feel competent about my knowledge of wine	46%	52%	51%	↑	→
9	Compared to others, I know less about the subject of wine	37%	44%	41%	↑	↓
10	Generally speaking, wine is an expensive drink	35%	39%	37%	↑	→
11	I don’t understand much about wine	27%	30%	27%	→	↓

Base: All US regular wine drinkers (n≥4,033)
↑/↓: Statistically significantly higher/lower than the previous wave(s) at a 95% confidence level
Source: IWSR, Vinitrac® US, July/October 2019, October/November 2022 and July/October 2023 (n≥4,033), US regular wine drinkers

Involvement and perceived expertise

Millennials over-index on involvement and perceived expertise. They are enthusiastic about wine but usually have a budget in mind. Gen Z show much lower interest, echoing recruitment struggles for the category

Involvement and perceived expertise in wine by generation

Percentage who 'agree' or 'strongly agree' with the following statements

Ranking '23		All US Regular Wine Drinkers (n=4,033)	Gen Z LDA-26 (n=262)	Millennials 27-42 (n=1,232)	Gen X 43-58 (n=1,075)	Boomers 59+ (n=1,464)
1	Drinking wine gives me pleasure	87%	79%	87%	88%	89%
2	I always look for the best quality wines I can get for my budget	79%	71%	83%	80%	76%
3	Deciding which wine to buy is an important decision	70%	66%	76%	71%	66%
4	I like to take my time when I purchase a bottle of wine	68%	71%	76%	67%	61%
5	Generally speaking, wine is reasonably priced	66%	62%	72%	65%	62%
6	I have a strong interest in wine	60%	66%	73%	64%	47%
7	Wine is important to me in my lifestyle	54%	56%	65%	54%	43%
8	I feel competent about my knowledge of wine	51%	52%	65%	53%	36%
9	Compared to others, I know less about the subject of wine	41%	52%	47%	36%	37%
10	Generally speaking, wine is an expensive drink	37%	50%	49%	36%	26%
11	I don't understand much about wine	27%	37%	28%	23%	28%

Base: All US regular wine drinkers (n=4,033)
%/%: Statistically significantly higher/lower than all regular wine drinkers at a 95% confidence level
Source: IWSR, Vinitrac® US, July/October 2023 (n=4,033), US regular wine drinkers

Wine knowledge and confidence indices

Increased wine knowledge has not translated into stronger confidence among regular wine drinkers

Wine knowledge index: Tracking[1]

Wine knowledge index is the 'objective' measurement of consumer knowledge about wine

	2019 (n=7,002)	2022 (n=8,057)	2023 (n=4,033)	Tracking vs. '19	Tracking vs. '22
Knowledge Index	27.5	26.5	28.2	↑	↑

Wine confidence index: Tracking[2]

Wine confidence index is the 'subjective' measurement of consumer confidence about their wine knowledge

	2019 (n=7,002)	2022 (n=8,057)	2023 (n=4,033)	Tracking vs. '19	Tracking vs. '22
Confidence Index	54.8	55.5	55.6	→	→

[1]Wine knowledge index (0–100) is calculated based on consumer-reported awareness of wine-producing countries, wine-growing regions and wine brands
[2]Wine confidence index (0–100) is calculated based on the extent to which consumers feel competent about their wine knowledge. Wine confidence index uses consumers' answers to three attitudinal statements: 1) I feel competent about my knowledge of wine / 2) Compared to others, I know less about the subject of wine / 3) I don't understand much about wine.
Base: All US regular wine drinkers (n≥4,033); ↑/↓: Statistically significantly higher/lower than the previous wave(s) at a 95% confidence level
Source: IWSR, Vinitrac® US, July/October 2019, October/November 2022 and July/October 2023 (n≥4,033), US regular wine drinkers

Wine-drinking motivations

Wine drinking is a habit among older US regular wine drinkers, with Boomers preferring to pair it with food, but it is more of a lifestyle drink for younger age groups

Wine drinking motivations by generation

Percentage who ‘agree’ or ‘strongly agree’ with the following statements

Ranking '23		All US Regular Wine Drinkers (n=4,033)	Gen Z LDA-26 (n=262)	Millennials 27-42 (n=1,232)	Gen X 43-58 (n=1,075)	Boomers 59+ (n=1,464)
1	Drinking wine makes me feel relaxed	60%	48%	56%	65%	62%
2	I really love the taste of wine	56%	46%	51%	61%	59%
3	Wine enhances food and meals	54%	43%	44%	56%	63%
4	To celebrate special occasions	53%	48%	49%	55%	56%
5	Wine helps create a warm / friendly atmosphere	42%	38%	40%	44%	43%
6	Drinking wine can be good for my health	40%	22%	37%	45%	43%
7	Wine is about sharing with a partner / close friend or family member	38%	33%	37%	37%	40%
8	I treat myself with wine at the end of the day	37%	39%	39%	42%	32%
9	Wine is about sharing something with others	35%	26%	31%	35%	39%
10	Wine is a refreshing drink	34%	34%	35%	34%	33%
11	I like learning about new wines	31%	33%	33%	34%	28%
12	I like shopping / choosing wines to drink	27%	31%	31%	26%	23%
13	Most of my friends drink wine	24%	27%	27%	23%	22%
14	Wine is a fashionable drink	21%	37%	26%	21%	15%
15	It makes me feel individual and unique	15%	25%	24%	14%	7%
16	It makes people sophisticated	12%	26%	18%	10%	6%

Base: All US regular wine drinkers (n=4,033)
%/%: Statistically significantly higher/lower than all regular wine drinkers at a 95% confidence level
Source: IWSR, Vinitrac® US, July/October 2023 (n=4,033), US regular wine drinkers

Wine-buying choice cues

Increased knowledge and the 'less-but-better' trend have pushed up choice cues compared to 2019. The leading cues have stabilised, although recommendations, awards and online availability have all declined since 2022

Wine choice cues: Tracking

Percentage who indicate each of the following factors is 'important' or 'very important' when buying wine

Ranking '23		2019 (n=7,002)	2022 (n=8,057)	2023 (n=4,033)	Tracking vs. '19	Tracking vs. '22
1	Grape variety	73%	76%	77%	↑	→
2=	A brand I am aware of	64%	71%	72%	↑	→
2=	Wine that matches or complements food	66%	70%	72%	↑	→
4	Taste or wine style descriptions displayed on the shelves or on wine labels	63%	68%	68%	↑	→
5	Recommendation by friend or family	62%	68%	67%	↑	→
6	The country of origin	50%	56%	58%	↑	→
7	The region of origin	49%	54%	55%	↑	→
8=	Promotional offer	51%	53%	53%	↑	→
8=	Alcohol content	43%	52%	53%	↑	→
10	Recommendations from shop staff or shop leaflets	48%	55%	52%	↑	↓
11	Appeal of the bottle and / or label design	38%	46%	43%	↑	↓
12	Recommendation by wine critic or writer	35%	43%	41%	↑	↓
13	Recommendation by wine guide books	31%	39%	37%	↑	↓
14	Whether or not the wine has won a medal or award	28%	35%	31%	↑	↓
15	Whether or not the wine is available to buy via the internet	20%	28%	25%	↑	↓

Base: All US regular wine drinkers (n≥4,033); = represents equal ranking
↑/↓: Statistically significantly higher/lower than the previous wave(s) at a 95% confidence level
Source: IWSR, Vinitrac® US, July/October 2019, October/November 2022 and July/October 2023 (n≥4,033), US regular wine drinkers

Drinking Repertoire

Drinking repertoire

Consumption of red and white wine is stable. The popularity of tequila and RTDs among regular wine drinkers shows long-term growth, underlining the threat posed by these to the wine category

Alcoholic beverage repertoire: Top 15 tracking

Percentage who have drunk the following beverages in the past 12 months

Ranking '23		2019 (n=7,002)	2022 (n=8,057)	2023 (n=4,033)	Tracking vs. '19	Tracking vs. '22
1	Red wine	77%	76%	78%	→	→
2	White wine	72%	72%	71%	→	→
3	Beer	60%	58%	60%	→	↑
4	Vodka	45%	48%	47%	↑	→
5	Whisky / Whiskey	37%	41%	41%	↑	→
6	Tequila	34%	36%	40%	↑	↑
7	Rosé wine	35%	37%	39%	↑	→
8	Craft beer	38%	33%	33%	↓	→
9	Rum	31%	31%	32%	→	→
10	Cocktails	28%	32%	31%	↑	→
11=	Champagne (French Champagne)	26%	28%	27%	→	→
11=	Hard seltzer	n/a	28%	27%	n/a	→
13=	Sparkling wine / Champagne from the USA	20%	22%	22%	↑	→
13=	Prosecco	20%	22%	22%	↑	→
13=	Pre-mixed / ready to drink alcoholic beverages	16%	20%	22%	↑	↑

Base: All US regular wine drinkers (n≥4,033); =Represents equal ranking

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

Source: IWSR, Vinitrac® US, July/October 2019, October/November 2022 and July/October 2023 (n≥4,033), US regular wine drinkers

Varietal consumption (1/2)

The varietal repertoires of RWDs have broadened since 2019. Only Pinot Grigio and Sauvignon Blanc strengthened their positions in the past year, possibly benefitting from affordability and wider recognition

White varietal consumption: Tracking

Percentage who have drunk the following varietals or wine types in the past six months

Ranking '23		2019 (n=7,002)	2022 (n=8,057)	2023 (n=4,033)	Tracking vs. '19	Tracking vs. '22
1	Chardonnay	48%	47%	48%	→	→
2	Pinot Grigio / Pinot Gris	42%	42%	44%	→	↑
3	Sauvignon Blanc	36%	36%	39%	↑	↑
4	Moscato	34%	35%	36%	→	→
5	Riesling	29%	28%	30%	→	→
6	White blend	21%	25%	25%	↑	→
7	Chenin Blanc	10%	11%	13%	↑	→
8=	Gewürztraminer	9%	10%	9%	→	→
8=	Fumé Blanc	7%	9%	9%	↑	→
8=	Viognier	7%	9%	9%	↑	→
11=	Verdejo	5%	7%	7%	↑	→
11=	Albariño	5%	7%	7%	↑	→
11=	Sémillon	5%	7%	7%	↑	→
11=	Torrontés	4%	6%	7%	↑	→
15=	Colombard	4%	7%	6%	↑	↓

Base: All US regular wine drinkers (n≥4,033); =Represents equal ranking

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

Source: IWSR, Vinitrac® US, July/October 2019, October/November 2022 and July/October 2023 (n≥4,033), US regular wine drinkers

Varietal consumption (2/2)

Merlot, Cabernet Sauvignon and Pinot Noir remain the top red varietals. Though the picture is largely stable, some regular wine drinkers have experimented with new varietals

Red varietal consumption: Tracking

Percentage who have drunk the following varietals or wine types in the past six months

Ranking '23		2019 (n=7,002)	2022 (n=8,057)	2023 (n=4,033)	Tracking vs. '19	Tracking vs. '22
1	Merlot	51%	49%	51%	→	→
2	Cabernet Sauvignon	46%	44%	47%	→	↑
3	Pinot Noir	43%	43%	43%	→	→
4	Red blend	34%	35%	36%	↑	→
5	Zinfandel	32%	30%	32%	→	↑
6	Malbec	24%	24%	23%	→	→
7	Shiraz / Syrah	20%	20%	19%	→	→
8	Sangiovese	11%	12%	12%	↑	→
9	Tempranillo	10%	10%	10%	→	→
10=	Meritage	8%	10%	9%	↑	→
10=	Pinotage	7%	9%	9%	↑	→
12=	Grenache / Garnacha	8%	9%	8%	→	→
12=	Carménère	6%	8%	8%	↑	→
14	Gamay	6%	8%	7%	→	↓

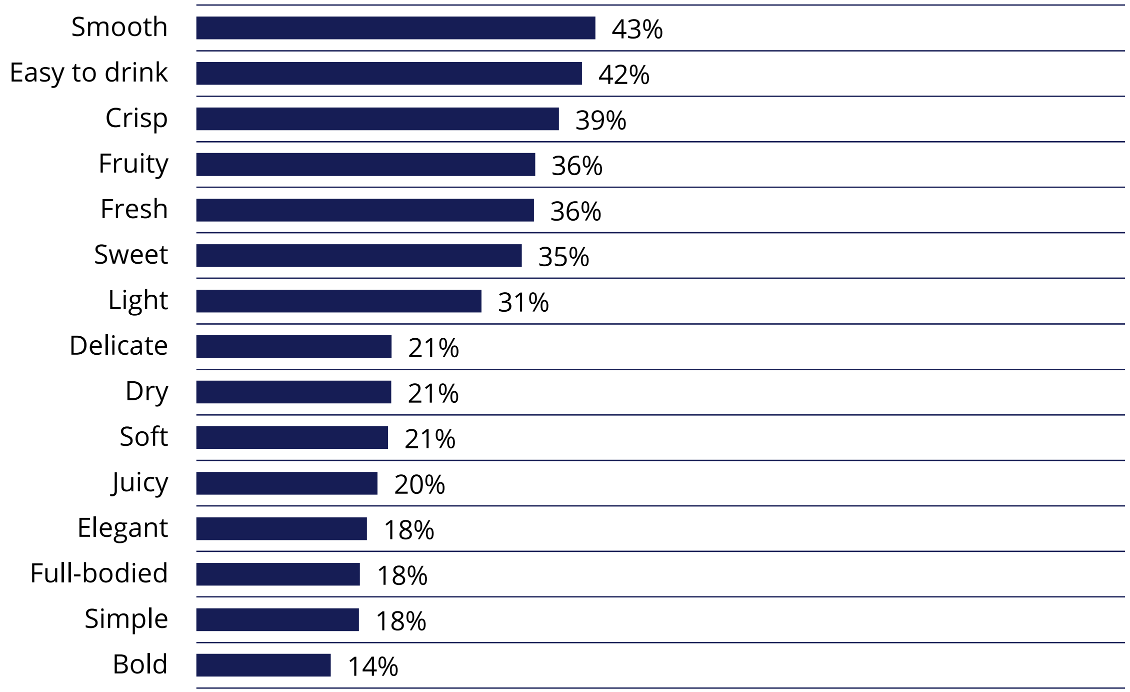
Base: All US regular wine drinkers (n≥4,033); =Represents equal ranking
↑/↓: Statistically significantly higher/lower than the previous wave(s) at a 95% confidence level
Source: IWSR, Vinitrac® US, July/October 2019, October/November 2022 and July/October 2023 (n≥4,033), US regular wine drinkers

Ideal wine attributes

The most preferred attributes among regular wine drinkers are 'smooth' and 'easy-to-drink' for both white and red wine. They also like their whites crisp, fruity and fresh, and their reds full-bodied and rich

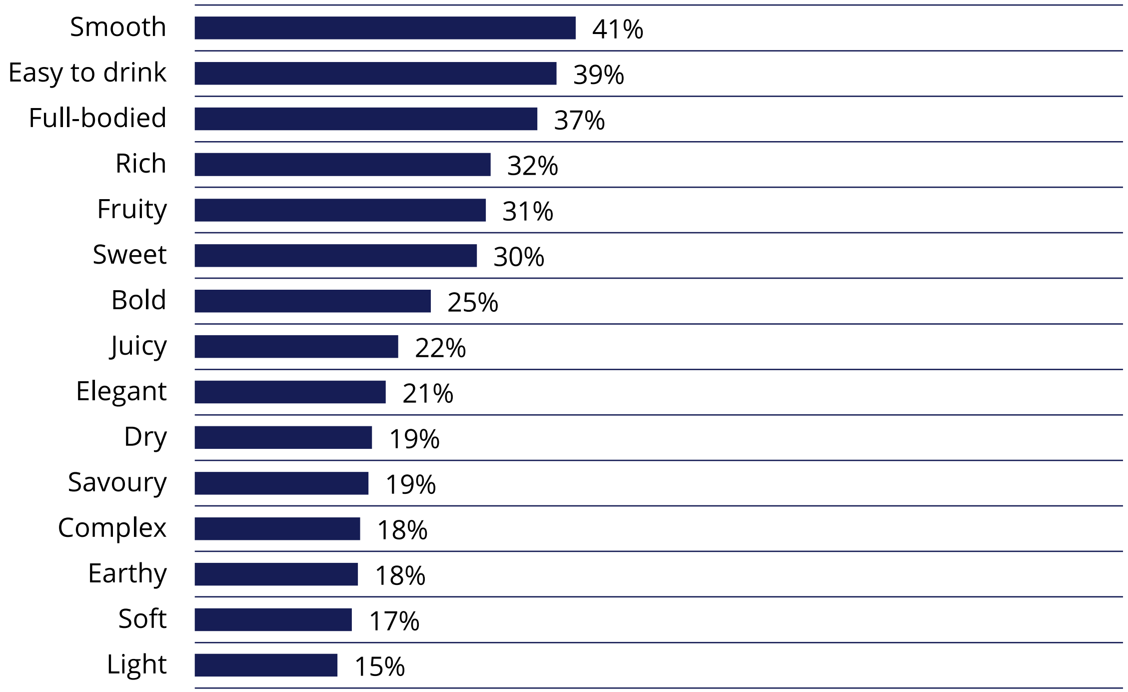
Ideal white wine attributes: Top 15

Percentage who select each description for their ideal white wine



Ideal red wine attributes: Top 15

Percentage who select each description for their ideal white wine



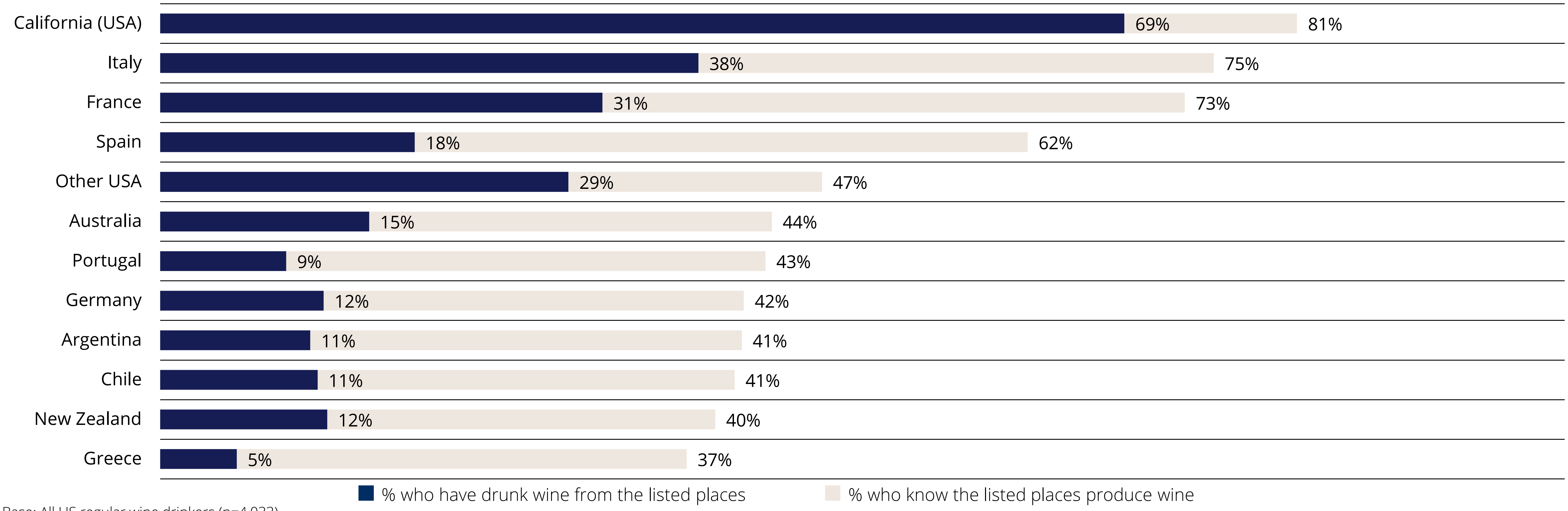
Base: All US regular wine drinkers (n=4,033)
Source: IWSR, Vinitrac® US, July/October 2023 (n=4,033), US regular wine drinkers

Country of origin awareness and consumption

California enjoys high awareness and consumption among regular wine drinkers. Purchase of Italian and French wines lags behind domestic wines, despite high awareness

Country of origin: Top 15 awareness and consumption levels

Percentage of those who know of or have drunk wine from the following places



Base: All US regular wine drinkers (n=4,033)
Source: IWSR, Vinitrac® US, July/October 2023 (n=4,033), US regular wine drinkers

Country of origin awareness

California and Italy are both enjoying steady increases in awareness. Following a post-pandemic dip, levels have rebounded since 2022, a trend boosted by higher awareness among the 55+ age group

Country of origin awareness: Tracking

Percentage of those who know the following places produce wine

Ranking '23		2019 (n=7,002)	2022 (n=8,057)	2023 (n=4,033)	Tracking vs. '19	Tracking vs. '22
1	California (USA)	78%	78%	81%	↑	↑
2	Italy	73%	70%	75%	↑	↑
3	France	71%	68%	73%	→	↑
4	Spain	61%	57%	62%	→	↑
5	Other USA	48%	47%	47%	→	→
6	Australia	45%	42%	44%	→	→
7	Portugal	41%	39%	43%	→	↑
8	Germany	43%	39%	42%	→	↑
9=	Argentina	44%	39%	41%	↓	↑
9=	Chile	44%	38%	41%	↓	↑
11	New Zealand	39%	36%	40%	→	↑
12	Greece	34%	35%	37%	↑	↑
13	South Africa	31%	27%	29%	→	↑
14	Canada	22%	22%	23%	→	→
15	Israel	18%	18%	19%	→	→

Base: All US regular wine drinkers (n≥4,033); =Represents equal ranking
↑/↓: Statistically significantly higher/lower than the previous wave(s) at a 95% confidence level
Source: IWSR, Vinitrac® US, July/October 2019, October/November 2022 and July/October 2023 (n≥4,033), US regular wine drinkers

Country of origin consumption

Most countries of origin have experienced growth or stable consumption in the past year. The longer-term picture shows a slight shift in preference towards North American and Old World wines

Country of origin consumption: Tracking

Percentage of those who have drunk wine from the following places in the past six months

Ranking '23		2019 (n=7,002)	2022 (n=8,057)	2023 (n=4,033)	Tracking vs. '19	Tracking vs. '22
1	California (USA)	65%	66%	69%	↑	↑
2	Italy	37%	36%	38%	→	↑
3	France	31%	29%	31%	→	↑
4	Other USA	29%	30%	29%	→	→
5	Spain	19%	17%	18%	→	↑
6	Australia	17%	14%	15%	↓	→
7=	New Zealand	11%	10%	12%	→	↑
7=	Germany	11%	11%	12%	→	→
9=	Chile	14%	10%	11%	↓	→
9=	Argentina	13%	10%	11%	↓	→
11	Portugal	7%	8%	9%	↑	↑
12=	Greece	4%	5%	5%	↑	→
12=	Canada	4%	5%	5%	↑	→
12=	South Africa	6%	5%	5%	↓	→
15	Moldova	n/a	2%	3%	n/a	→

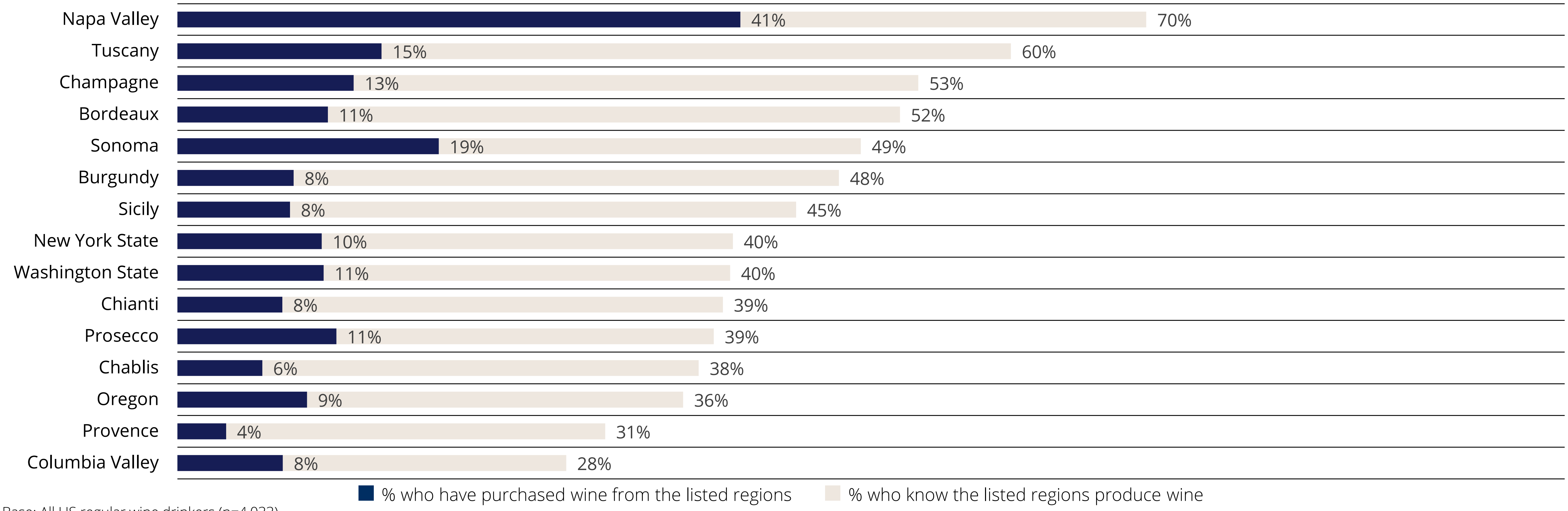
Base: All US regular wine drinkers (n≥4,033); =Represents equal ranking
↑/↓: Statistically significantly higher/lower than the previous wave(s) at a 95% confidence level
Source: IWSR, Vinitrac® US, July/October 2019, October/November 2022 and July/October 2023 (n≥4,033), US regular wine drinkers

Region of origin awareness and purchase

Napa Valley is by far the region with the highest awareness and purchase. Sonoma and Prosecco have relatively high levels of purchase relative to their awareness

Region of origin: Top 15 awareness and purchase levels

Percentage of those who know of or have purchased wine from the following regions in the past three months



Base: All US regular wine drinkers (n=4,033)
Source: IWSR, Vinitrac® US, July/October 2023 (n=4,033), US regular wine drinkers

Region of origin awareness

Awareness has largely rebounded to levels consistent with those seen pre-pandemic

Region of origin awareness: Tracking

Percentage of those who know the following places produce wine

Ranking '23		2019 (n=7,002)	2022 (n=8,057)	2023 (n=4,033)	Tracking vs. '19	Tracking vs. '22
1	Napa Valley	71%	65%	70%	→	↑
2	Tuscany	59%	55%	60%	→	↑
3	Champagne	54%	49%	53%	→	↑
4	Bordeaux	54%	49%	52%	→	↑
5	Sonoma	51%	46%	49%	→	↑
6	Burgundy	49%	45%	48%	→	↑
7	Sicily	41%	39%	45%	↑	↑
8=	New York State	41%	40%	40%	→	→
8=	Washington State	42%	38%	40%	↓	→
10=	Chianti	41%	37%	39%	↓	↑
10=	Prosecco	36%	36%	39%	↑	↑
12	Chablis	39%	35%	38%	→	↑
13	Oregon	38%	34%	36%	↓	↑
14	Provence	31%	29%	31%	→	→
15	Columbia Valley	28%	25%	28%	→	↑

Base: All US regular wine drinkers (n≥4,033); =Represents equal ranking

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

Source: IWSR, Vinitrac® US, October 2019, November 2022, October 2023 (n≥4,033), US regular wine drinkers

Region of origin purchase

US regions account for half of those with the highest purchase rates. Italy and France are the only other countries with regions in the top 10

Region of origin purchase: Tracking

Percentage of those who have bought wine from the following regions in the past three months

Ranking '23		2019 (n=7,002)	2022 (n=8,057)	2023 (n=4,033)	Tracking vs. '19	Tracking vs. '22
1	Napa Valley	41%	39%	41%	→	↑
2	Sonoma	20%	17%	19%	→	→
3	Tuscany	13%	12%	15%	↑	↑
4	Champagne	11%	11%	13%	↑	↑
5=	Prosecco	10%	12%	11%	↑	→
5=	Bordeaux	10%	10%	11%	→	→
5=	Washington State	11%	11%	11%	→	→
8	New York State	9%	13%	10%	→	↓
9	Oregon	10%	9%	9%	→	→
10=	Burgundy	8%	8%	8%	→	→
10=	Sicily	7%	7%	8%	↑	→
10=	Columbia Valley	8%	6%	8%	→	↑
10=	Chianti	8%	8%	8%	→	→
14=	Chablis	6%	6%	6%	→	→
14=	Paso Robles	6%	6%	6%	→	→

Base: All US regular wine drinkers (n≥4,033); = represents equal ranking

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

Source: IWSR, Vinitrac® US, July/October 2019, October/November 2022 and July/October 2023 (n≥4,033), US regular wine drinkers

Wine-Buying Behaviours

Wine-buying channel usage

US regular wine drinkers have diversified their wine purchasing channels since the pandemic. Purchases at supermarkets have remained stable, but have doubled through wine clubs and membership organisations

Wine-buying channel usage: Tracking

Percentage who have bought wine from the following channels in the past six months

Ranking '23		2019 (n=7,002)	2022 (n=8,057)	2023 (n=4,033)	Tracking vs. '19	Tracking vs. '22
1	In a supermarket	50%	48%	50%	→	→
2	In a liquor store	47%	46%	49%	↑	↑
3	In a super store	33%	37%	38%	↑	→
4	In a club store	27%	28%	28%	→	→
5	In a wine shop	25%	27%	27%	↑	→
6=	From a winery during the visit	16%	16%	15%	→	→
6=	In a state-controlled liquor store	13%	15%	15%	↑	→
8	In a convenience store	10%	13%	14%	↑	→
9	From a wine club or membership organization	6%	11%	12%	↑	→
10=	From an online retailer	n/a	11%	10%	n/a	→
10=	From a supermarket website	n/a	10%	10%	n/a	→
10=	From a winery's website	n/a	9%	10%	n/a	→
13=	From a delivery app	n/a	9%	9%	n/a	→
13=	In a drug store	10%	10%	9%	→	↓

Base: All US regular wine drinkers (n≥4,033); = represents equal ranking; n/a = tracking unavailable for this wave

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

Source: IWSR, Vinitrac® US, July/October 2019, October/November 2022 and July/October 2023 (n≥4,033), US regular wine drinkers

Market context

"Sales through the D2C channel decreased in both volume and value as levels headed back towards normal after strong pandemic-related growth. However, D2C and three-tier ecommerce continue to outpace total category growth."

Executive Summary Report 2023, US

Wine-buying retailer usage

The leading wine retailers have increased their share of purchasing since 2019, to the detriment of those already less frequented by regular wine drinkers

Wine-buying retailer usage Top 15: Tracking

Percentage who have bought wine from the following channels in the past six months

Ranking '23		2019	2022	2023	Tracking vs. '19	Tracking vs. '22
1	Walmart	28%	31%	31%	↑	→
2	Total Wine & More	14%	15%	18%	↑	↑
3	Costco	17%	16%	17%	→	→
4=	Target	11%	14%	13%	↑	↓
4=	Kroger	9%	11%	13%	↑	↑
6	State Liquor store	12%	12%	12%	→	→
7=	Trader Joe's	12%	10%	9%	↓	→
7=	Sam's Club	7%	9%	9%	↑	→
9	Publix	8%	7%	7%	↓	→
10	Aldi	6%	7%	6%	→	↓
11	Safeway	6%	5%	5%	↓	→
12=	Whole Foods Market	5%	5%	4%	↓	→
12=	Walgreens	6%	5%	4%	↓	→
12=	wine.com	3%	4%	4%	↑	→
12=	Meijer	3%	4%	4%	↑	→

Base: Those who buy wine in the off-premise; = represents equal ranking
↑/↓: Statistically significantly higher/lower than the previous wave(s) at a 95% confidence level
Source: IWSR, Vinitrac® US, July/October 2019, October/November 2022 and July/October 2023 (n≥4,033), US regular wine drinkers

Consumption frequency

Consumption frequency is consistent with before the pandemic. Millennials are drinking significantly more often than other age groups – and Boomers less

Wine consumption frequency: Tracking

Percentage who usually drink wine at the following frequency

	2019 (n=7,002)	2022 (n=8,057)	2023 (n=4,033)	Tracking vs. '19	Tracking vs. '22
Most days / every day	12%	12%	11%	→	→
2-5 times a week	34%	37%	35%	→	↓
About once a week	27%	27%	27%	→	→
1-3 times a month	27%	24%	27%	→	↑

Wine consumption frequency: by generation

Percentage who usually drink wine at the following frequency

	All US Regular Wine Drinkers (n=4,033)	Gen Z LDA-26 (n=262)	Millennials 27-42 (n=1,232)	Gen X 43-58 (n=1,075)	Boomers 59+ (n=1,464)
Most days / every day	11%	10%	12%	11%	11%
2-5 times a week	35%	33%	45%	34%	27%
About once a week	27%	30%	23%	27%	31%
1-3 times a month	27%	27%	21%	28%	32%

Base: All US regular wine drinkers (n≥4,033)

↑/↓: Statistically significantly higher/lower than the previous wave(s) at a 95% confidence level; %/%: Statistically significantly higher/lower than all regular wine drinkers at a 95% confidence level

Source: IWSR, Vinitrac® US, July/October 2019, October/November 2022 and July/October 2023 (n≥4,033), US regular wine drinkers

Off-premise consumption frequency

Wine continues to be chosen most often for a relaxing drink and informal meals at home. Increases for formal and special occasions have retreated or stabilised compared to last year

Off-premise: Wine consumption frequency by occasion

Those who buy wine in the off-premise; table below shows the number of days per month that consumers are drinking wine at these occasions

	2019	2022	2023	Tracking vs. '19	Tracking vs. '22
A relaxing drink at the end of the day at home	6.86	7.21	7.07	→	→
With an informal meal at home	5.59	5.83	5.71	→	→
With a more formal dinner party at home	2.16	2.50	2.29	→	↓
At a party / celebration at home	2.12	2.39	2.40	↑	→

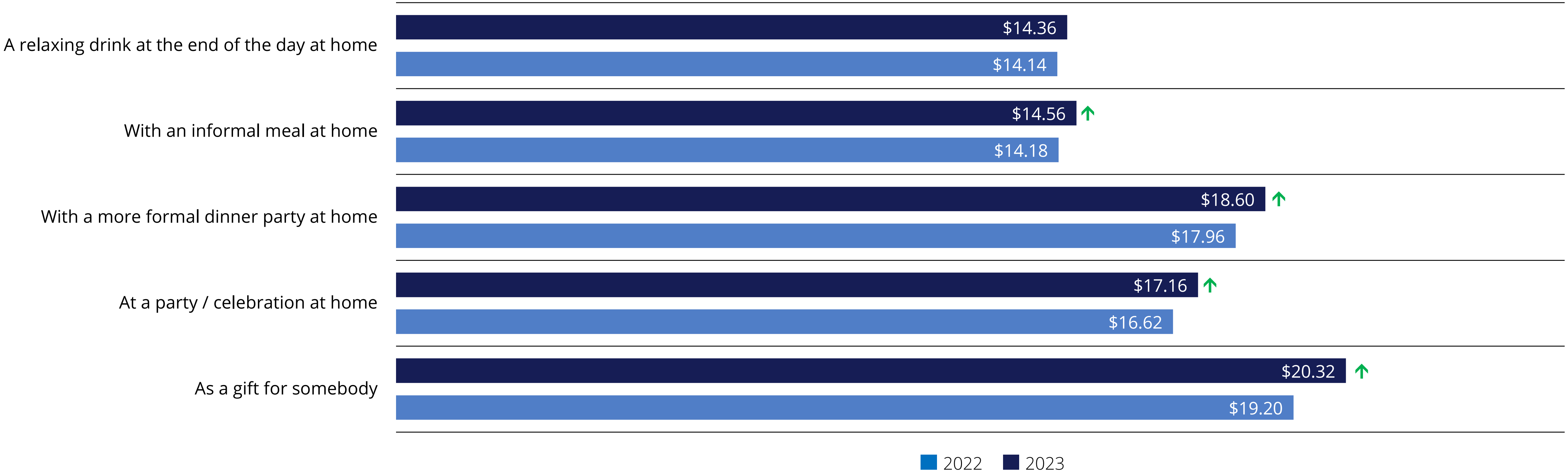
Base: Those who buy wine in the off-premise
↑/↓: Statistically significantly higher/lower than the previous wave(s) at a 95% confidence level
Source: IWSR, Vinitrac® US, July/October 2019, October/November 2022 and July/October 2023 (n≥4,033), US regular wine drinkers

Off-premise spend

Regular wine drinkers are typically spending more on wine to drink at home and for gifts than last year. However, spend for a relaxing drink at the end of the day has fallen and is the lowest typical spend

Off-premise: Typical spend per bottle by occasion

Those who buy wine in the off-premise



Base: Those who buy wine in the off-premise

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

Source: IWSR, Vinitrac® US, October/November 2022 and July/October 2023 (n≥4,033), US regular wine drinkers

On-premise purchase

Against the backdrop of a challenging partial recovery for the on-premise, regular wine drinkers have increased their purchasing levels since before the pandemic, boosted by the high involvement of Millennials

Wine purchase in on-premise

Percentage who buy wine in a bar, pub or restaurant

		2019 (n=7,002)	2022 (n=8,057)	2023 (n=4,033)	Tracking vs. '19	Tracking vs. '22
On-trade drinkers	Yes	87%	87%	88%	→	→
	No	13%	13%	12%	→	→
Bar or pub	Yes	53%	57%	57%	↑	→
	No	47%	43%	43%	↓	→
Restaurant	Yes	84%	83%	86%	↑	↑
	No	16%	17%	14%	↓	↓

Wine purchase in on-premise: by generation

Percentage who buy wine in a bar, pub or restaurant

		All US Regular Wine Drinkers (n=4,033)	Gen Z LDA-26 (n=262)	Millennials 27-42 (n=1,232)	Gen X 43-58 (n=1,075)	Boomers 59+ (n=1,464)
On-trade drinkers	Yes	88%	92%	93%	87%	84%
	No	12%	8%	7%	13%	16%
Bar or pub	Yes	57%	55%	69%	55%	47%
	No	43%	45%	31%	45%	53%
Restaurant	Yes	86%	88%	88%	85%	84%
	No	14%	12%	12%	15%	16%

Market context

"The on-premise remains challenging for still wine, with reduced wine lists, increased price awareness among consumers and a decrease in the number of outlets due to closures. Fine dining, which is a key channel for wine, has experienced a significant decline in restaurant numbers, limiting opportunities for consumers to interact with wine."

Executive Summary Report 2023, US

Base: All US regular wine drinkers (n≥4,033)
↑/↓: Statistically significantly higher/lower than the previous wave(s) at a 95% confidence level; %/%: Statistically significantly higher/lower than all regular wine drinkers at a 95% confidence level
Source: IWSR, Vinitrac® US, July/October 2019, October/November 2022 and July/October 2023 (n≥4,033), US regular wine drinkers

On-premise consumption frequency

Frequency of consumption among those who buy wine in the on-premise has increased for all measures compared with before the pandemic, but has stalled or decreased in the past year

On-premise: Wine consumption frequency by occasion

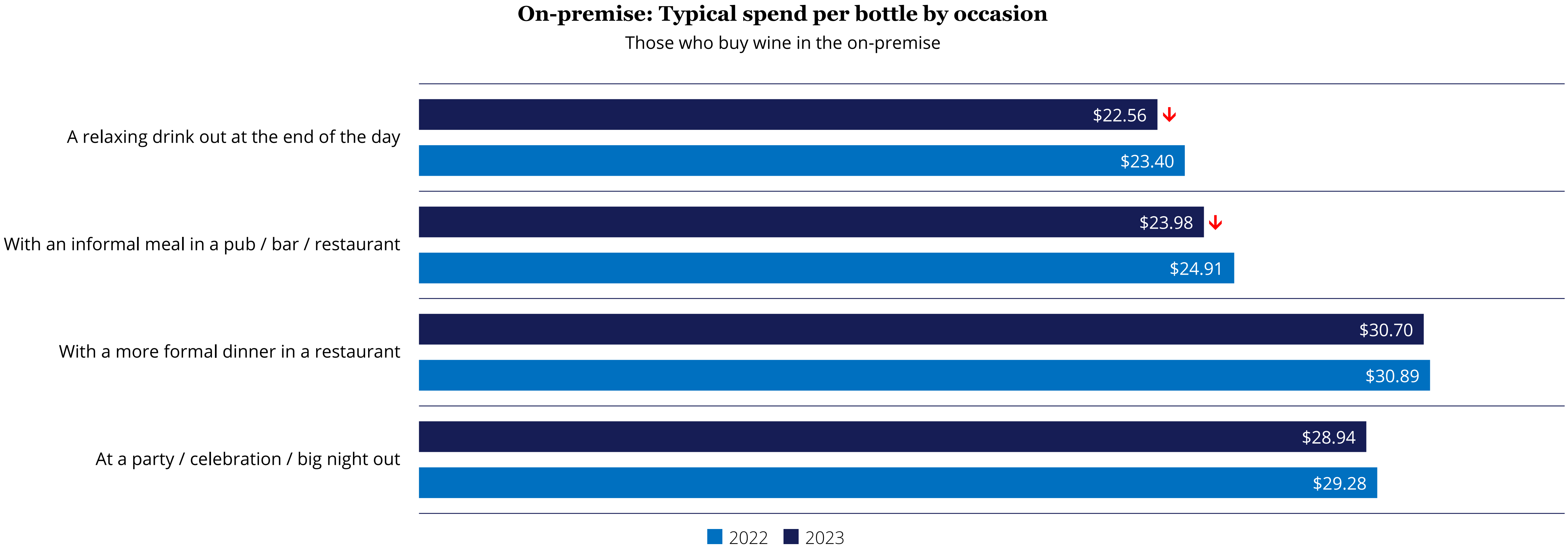
Those who buy wine in the on-premise

	2019	2022	2023	Tracking vs. '19	Tracking vs. '22
A relaxing drink out at the end of the day	4.30	5.09	5.20	↑	→
With an informal meal in a pub / bar / restaurant	2.65	2.99	2.90	↑	→
With a more formal dinner in a restaurant	2.41	2.82	2.64	↑	↓
At a party / celebration / big night out	2.14	2.40	2.35	↑	→

Base: Those who buy wine in the on-premise. Table shows the number of days per month that consumers are drinking wine at these occasions
↑/↓: Statistically significantly higher/lower than the previous wave(s) at a 95% confidence level
Source: IWSR, Vinitrac® US, July/October 2019, October/November 2022 and July/October 2023 (n≥4,033), US regular wine drinkers

On-premise spend

Lower typical spends show that regular wine drinkers have tightened their on-premise spending on casual occasions



Base: Those who buy wine in the on-premise
↑/↓: Statistically significantly higher/lower than the previous wave(s) at a 95% confidence level
Source: IWSR, Vinitrac® US, October/November 2022 and July/October 2023 (n≥4,033), US regular wine drinkers

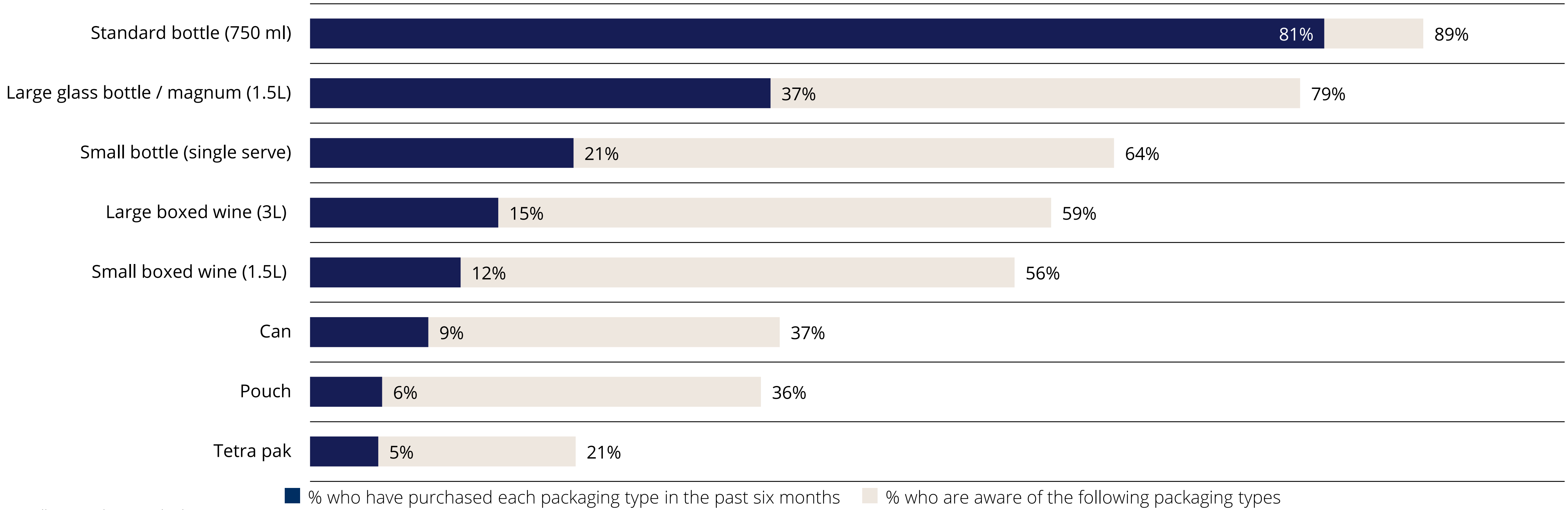
Packaging and Wine Closures

Packaging type awareness and purchase

The 75cl bottle continues to be the standard for wine. Magnums are the second most popular. A fifth of regular wine drinkers purchase wine in single-serve bottles

Packaging types: awareness and purchase levels

Percentage of those who are aware of or have purchased wine in the following packaging types



Base: All US regular wine drinkers (n=4,033)

Source: IWSR, Vinitrac® US, July/October 2023 (n=4,033), US regular wine drinkers

Packaging purchase

Trial of alternative packaging is led by younger LDA+ consumers, with nearly a third of Millennials having purchased wine in small bottles, and 17% in a can

Packaging purchase: by generation

Percentage who have purchased wine in the following packaging types

Ranking '23		All US Regular Wine Drinkers (n=4,033)	Gen Z LDA-26 (n=262)	Millennials 27-42 (n=1,232)	Gen X 43-58 (n=1,075)	Boomers 59+ (n=1,464)
1	Standard bottle (750 ml)	81%	64%	71%	84%	89%
2	Large glass bottle / magnum (1.5L)	37%	45%	46%	38%	26%
3	Small bottle (single serve)	21%	26%	29%	22%	12%
4	Large boxed wine (3L)	15%	22%	18%	14%	11%
5	Small boxed wine (1.5L)	12%	13%	15%	13%	7%
6	Can	9%	14%	17%	8%	3%
7	Pouch	6%	10%	11%	4%	2%
8	Tetra pak	5%	11%	10%	4%	1%

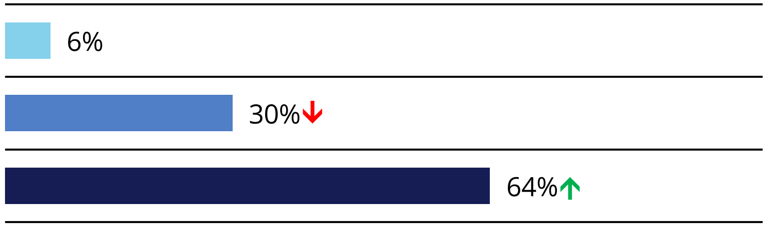
Base: All US regular wine drinkers (n=4,033)
%/%: Statistically significantly higher/lower than all regular wine drinkers at a 95% confidence level;
Source: IWSR, Vinitrac® US, July/October 2023 (n=4,033), US regular wine drinkers

Wine closures

All types of wine closure are viewed increasingly positively by US regular wine drinkers, driven by their individual perceived strengths. Natural cork remains by far the favourite type of closure

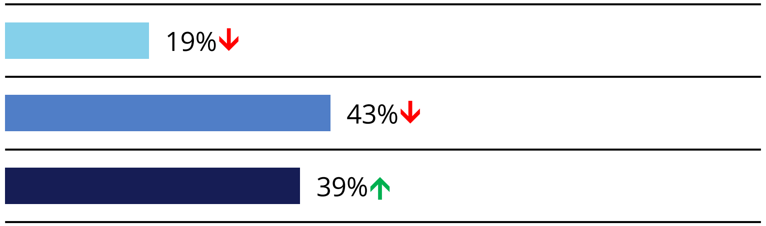
Natural cork

% who selected the following attitude for the wine closure



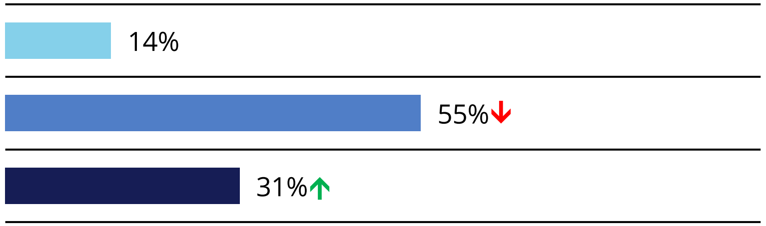
Screw-cap

% who selected the following attitude for the wine closure



Synthetic cork

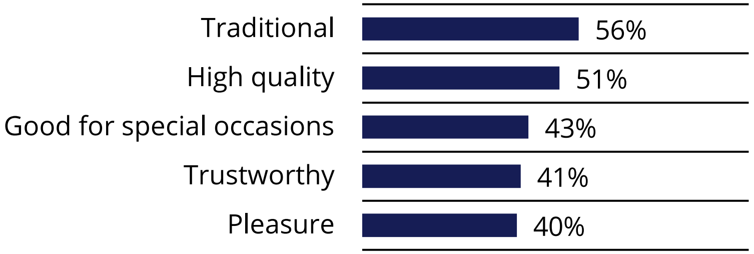
% who selected the following attitude for the wine closure



■ I don't buying wine with this closure ■ Neutral ■ I like buying wine with this closure

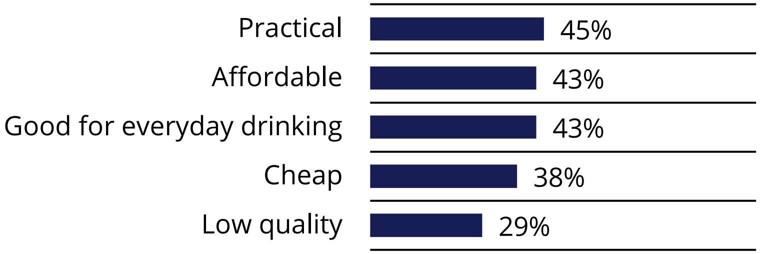
Top 5 attributes

% who associate the following statements with each type of wine closure (n=4,033)



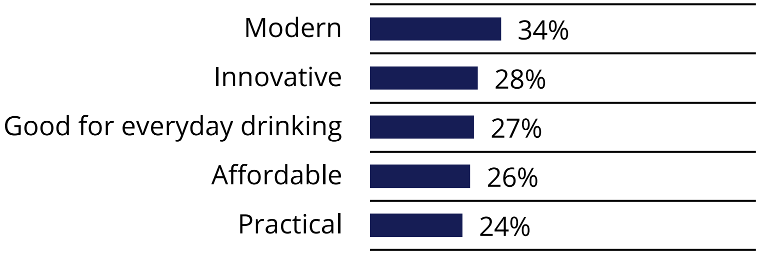
Top 5 attributes

% who associate the following statements with each type of wine closure (n=4,033)



Top 5 attributes

% who associate the following statements with each type of wine closure (n=4,033)



Base: All US regular wine drinkers (n≥4,033); ↑/↓: Statistically significantly higher/lower than the 2019 wave at a 95% confidence level; Source: IWSR, Vinitrac® US, July/October 2019, and July/October 2023 (n≥4,033), US regular wine drinkers.

Brand Health

Brand awareness

Awareness for almost all the top 30 brands is up since 2022, after decline for many in previous years. This is driven by more knowledgeable RWDs, possibly helped by exposure to more brands by shopping in larger stores

Awareness: Tracking

Percentage who have heard of the following brands

Ranking '23		2019 (n=7,002)	2022 (n=8,057)	2023 (n=4,033)	Tracking vs. '19	Tracking vs. '22
1	Barefoot	71%	66%	71%	→	↑
2	Sutter Home	69%	65%	68%	→	↑
3	Yellow Tail	69%	61%	65%	↓	↑
4	Gallo Family Vineyards	59%	57%	59%	→	↑
5	Stella Rosa	42%	49%	54%	↑	↑
6	Woodbridge	56%	49%	52%	↓	↑
7	Cupcake	51%	48%	51%	→	↑
8	Franzia	49%	47%	50%	→	↑
9	Carlo Rossi	51%	45%	49%	→	↑
10	Beringer	53%	44%	48%	↓	↑
11	Robert Mondavi	49%	43%	46%	↓	↑
12	Kirkland Signature	43%	42%	45%	↑	↑
13=	Kendall-Jackson	48%	41%	44%	↓	↑
13=	Coppola	41%	40%	44%	↑	↑
15	Josh Cellars	26%	37%	43%	↑	↑
16	Black Box	39%	38%	41%	→	↑
17	Ménage à Trois	41%	38%	40%	→	↑
18	Apothic	31%	34%	37%	↑	↑
19	Riunite	33%	32%	34%	→	↑
20	Dark Horse	28%	29%	32%	↑	↑
21=	19 Crimes	21%	28%	31%	↑	↑
21=	Decoy	n/a	27%	31%	n/a	↑
23=	Chateau Ste. Michelle	33%	28%	30%	↓	↑
23=	Kim Crawford	20%	26%	30%	↑	↑
25=	Inglenook	31%	28%	29%	↓	→
25=	Clos du Bois	33%	27%	29%	↓	↑
27=	The Naked Grape	32%	27%	28%	↓	→
27=	Sonoma-Cutrer	30%	26%	28%	→	↑
29=	Oyster Bay	23%	23%	26%	↑	↑
30=	Fetzer	30%	25%	26%	↓	→

Note: Results for all brands available in the data table
Base: All US regular wine drinkers (n≥4,033); n/a: Brand not tracked that year; = represents equal ranking;
↑/↓: Statistically significantly higher/lower than the previous wave(s) at a 95% confidence level
Source: IWSR, Vinitrac® US, July/October 2019, October/November 2022 and July/October 2023 (n≥4,033), US regular wine drinkers

Brand purchase

Brand purchase is up across many top 30 brands, with Josh Cellars doubling its rate since 2019. Regular wine drinkers are expanding their repertoires, but within the context of price sensitivity and moderation

Purchase: Tracking

Percentage who have bought the following brands in the past three months

Ranking '23		2019 (n=7,002)	2022 (n=8,057)	2023 (n=4,033)	Tracking vs. '19	Tracking vs. '22
1	Barefoot	26%	27%	30%	↑	↑
2	Yellow Tail	23%	20%	23%	→	↑
3	Sutter Home	15%	18%	19%	↑	↑
4=	Cupcake	12%	13%	14%	↑	→
4=	Josh Cellars	7%	12%	14%	↑	↑
4=	Stella Rosa	9%	12%	14%	↑	↑
7	Kirkland Signature	12%	11%	12%	→	↑
8=	Apothic	9%	11%	11%	↑	→
8=	Gallo Family Vineyards	8%	9%	11%	↑	↑
10=	Kendall-Jackson	10%	9%	10%	→	↑
10=	Ménage à Trois	9%	8%	10%	↑	↑
12=	Woodbridge	11%	10%	9%	↓	→
12=	19 Crimes	6%	8%	9%	↑	→
14=	Franzia	8%	8%	8%	→	→
14=	Beringer	10%	8%	8%	↓	→

Ranking '23		2019 (n=7,002)	2022 (n=8,057)	2023 (n=4,033)	Tracking vs. '19	Tracking vs. '22
14=	Robert Mondavi	9%	8%	8%	→	→
14=	Coppola	7%	8%	8%	↑	→
18=	Chateau Ste. Michelle	9%	7%	7%	↓	→
18=	Black Box	6%	7%	7%	↑	→
18=	Carlo Rossi	6%	6%	7%	→	→
18=	Decoy	n/a	6%	7%	n/a	→
18=	Dark Horse	6%	6%	7%	↑	↑
23	Kim Crawford	4%	5%	6%	↑	↑
24=	The Naked Grape	5%	5%	5%	→	→
24=	La Crema	4%	5%	5%	↑	→
24=	Clos du Bois	5%	4%	5%	→	→
24=	J. Lohr	n/a	4%	5%	n/a	→
24=	Bogle	4%	4%	5%	→	→
29=	Oyster Bay	3%	4%	4%	↑	↑
30=	Casillero del Diablo	4%	5%	4%	→	→

Note: Results for all brands available in the data table
Base: All US regular wine drinkers (n≥4,033); n/a: Brand not tracked that year; = represents equal ranking;
↑/↓: Statistically significantly higher/lower than the previous wave(s) at a 95% confidence level
Source: IWSR, Vinitrac® US, July/October 2019, October/November 2022 and July/October 2023 (n≥4,033), US regular wine drinkers

Brand conversion

Conversion has increased for many of the top 15 brands since 2019 but has remained mostly stable in the past year. Rates for Barefoot, Ménage à Trois and Layer Cake have all increased since 2022

Conversion: Tracking

Percentage who have bought the following brands in the past three months

Ranking '23		2019	2022	2023	Tracking	
					vs. '19	vs. '22
1	Barefoot	37%	40%	43%	↑	↑
2	Yellow Tail	33%	33%	35%	↑	→
3	Josh Cellars	28%	33%	33%	↑	→
4	Apothic	29%	32%	30%	→	→
5=	Sutter Home	22%	27%	28%	↑	→
5=	19 Crimes	29%	30%	28%	→	→
5=	Cupcake	23%	27%	28%	↑	→
8=	Les Dauphins	19%	25%	27%	↑	→
8=	Kirkland Signature	27%	26%	27%	→	→
10=	Stella Rosa	22%	25%	25%	↑	→
10=	Ménage à Trois	21%	22%	25%	↑	↑
10=	Carmen	n/a	21%	25%	n/a	→
13=	Chateau Ste. Michelle	26%	25%	24%	→	→
13=	Meiomi	24%	25%	24%	→	→
15=	Kendall-Jackson	20%	22%	23%	↑	→

Ranking '23		2019	2022	2023	Tracking	
					vs. '19	vs. '22
15=	Bogle	20%	21%	23%	→	→
17	Decoy	n/a	23%	22%	n/a	→
18=	Castello del Poggio	20%	19%	21%	→	→
18=	Trapiche	n/a	21%	21%	n/a	→
18=	La Crema	18%	22%	21%	→	→
18=	Casal Garcia	19%	21%	21%	→	→
18=	Dark Horse	20%	20%	21%	→	→
18=	J. Lohr	n/a	19%	21%	n/a	→
24=	Casillero del Diablo	20%	24%	20%	→	↓
24=	14 Hands	22%	19%	20%	→	→
24=	Layer Cake	16%	15%	20%	↑	↑
24=	Villa Maria	18%	17%	20%	→	→
24=	Line 39	20%	18%	20%	→	→
29=	Silk and Spice	n/a	n/a	19%	n/a	n/a
29=	Kim Crawford	19%	19%	19%	→	→

Note: Results for all brands available in the data table
Base: Those who have heard of each brand; n/a: Brand not tracked that year; = represents equal ranking;
↑/↓: Statistically significantly higher/lower than the previous wave(s) at a 95% confidence level
Source: IWSR, Vinitrac® US, July/October 2019, October/November 2022 and July/October 2023 (n≥4,033), US regular wine drinkers

Brand consideration

Reflecting its increased purchase levels, Josh Cellars ranks first for brand consideration, with a significant increase on pre-pandemic levels.

Consideration: Tracking

Percentage who would consider buying the following brands

Ranking '23		2019	2022	2023	Tracking vs. '19	Tracking vs. '22
1	Josh Cellars	63%	65%	67%	↑	→
2=	19 Crimes	62%	61%	59%	→	→
2=	Apothic	60%	59%	59%	→	→
4=	Barefoot	59%	60%	58%	→	→
4=	Chateau Ste. Michelle	63%	60%	58%	↓	→
6	Yellow Tail	60%	58%	57%	↓	→
7	Kendall-Jackson	57%	57%	56%	→	→
8	Robert Mondavi	57%	55%	55%	→	→
9=	J. Lohr	n/a	50%	54%	n/a	→
9=	Meiomi	55%	52%	54%	→	→
9=	Cupcake	54%	54%	54%	→	→
9=	Santa Margherita	55%	54%	54%	→	→
9=	Coppola	57%	57%	54%	→	↓
14	Ménage à Trois	54%	54%	53%	→	→
15	14 Hands	59%	53%	52%	↓	→

Ranking '23		2019	2022	2023	Tracking vs. '19	Tracking vs. '22
16=	Decoy	n/a	53%	51%	n/a	→
16=	Dark Horse	53%	52%	51%	→	→
16=	Woodbridge	53%	52%	51%	→	→
16=	Joel Gott	49%	49%	51%	→	→
20=	La Crema	51%	52%	50%	→	→
20=	Louis Jadot	49%	49%	50%	→	→
20=	Stella Rosa	48%	49%	50%	→	→
20=	Layer Cake	51%	48%	50%	→	→
24=	Sutter Home	49%	50%	49%	→	→
24=	The Naked Grape	49%	51%	49%	→	→
24=	Beringer	54%	52%	49%	↓	↓
27=	Clos du Bois	51%	51%	48%	→	→
27=	Kirkland Signature	49%	48%	48%	→	→
29=	Les Dauphins	36%	45%	47%	↑	→
30=	Bogle	53%	48%	47%	↓	→

Note: Results for all brands available in the data table
Base: Those who have heard of each brand; n/a: Brand not tracked that year; = represents equal ranking;
↑/↓: Statistically significantly higher/lower than the previous wave(s) at a 95% confidence level
Source: IWSR, Vinitrac® US, July/October 2019, October/November 2022 and July/October 2023 (n≥4,033), US regular wine drinkers

Research Methodology

Research methodology

Quantitative

Data has been collected in US since July 2017.

The July/October 2019 and October/November 2022 waves were tracked against July/October 2023.

Data was gathered via IWSR's Vinitrac® online survey.

Respondents were screened to ensure that they were: at least 21 years old; drank red, white, rosé or blush wine at least once a month; and bought wine in the off-premise or on-premise.

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

The data is representative of US regular wine drinkers in terms of gender*, age, US divisions and annual pre-tax household income.

The distribution of the sample is shown in the table.

		Jul/Oct-19	Oct-21	Oct/Nov-22	Jul/Oct-23
	n=	7,002	6,000	8,057	4,033
Gender*	Male	51%	43%	46%	48%
	Female	49%	57%	54%	51%
	Total	*100%*	*100%*	*100%*	*100%*
Age	21-24	7%	4%	4%	5%
	25-34	21%	14%	19%	18%
	35-44	18%	19%	18%	17%
	45-54	15%	16%	18%	17%
	55-64	16%	19%	18%	18%
	65 and over	22%	28%	24%	25%
	Total	*100%*	*100%*	*100%*	*100%*
US Divisions	New England	5%	6%	4%	5%
	Middle Atlantic	15%	17%	16%	15%
	East North Central	11%	13%	16%	14%
	West North Central	6%	7%	5%	6%
	South Atlantic	21%	20%	21%	20%
	East South Central	4%	6%	4%	4%
	West South Central	11%	11%	11%	10%
	Mountain	7%	6%	6%	7%
	Pacific	20%	15%	18%	18%
	Total	*100%*	*100%*	*100%*	*100%*
Annual household income before taxes	Under $50,000	n/a	28%	25%	26%
	$50,000 - $99,999	n/a	31%	32%	31%
	$100,000+	n/a	35%	41%	40%
	Prefer not to answer**	n/a	6%	2%	3%
	Total	*n/a*	*100%*	*100%*	*100%*

Source: Vinitrac® US, July 2017 - July/October 2023 (n ≥ 2,016) US regular wine drinkers

*Please note that additional Gender categories were also surveyed. These categories fell naturally in the sample and were not enforced via quotas
Source: IWSR, Vinitrac® US, July/October 2019, October 2021, October/November 2022 and July/October 2023 (n≥4,033), US regular wine drinkers

About
IWSR Drinks Market Analysis

IWSR
drinks market analysis

IWSR is the leading source of data and intelligence on the beverage alcohol market. The IWSR database, essential to the industry, quantifies the global market of wine, spirits, beer, cider and RTDs (ready-to-drink) by volume and value in 160 countries, and provides insight into short- and long-term trends, including five-year volume and value forecasts, as well as consumer behaviour. IWSR tracks overall consumption and trends at brand, price segment and category level. Our data is used by the major international wine, spirits and beer companies, as well as financial and beverage-alcohol market suppliers.

IWSR's unique methodology allows us to get closer to what is actually consumed and better understand how markets work. IWSR boasts a team of global analysts, each of whom is equipped with local market expertise and an expansive network of on-the-ground industry contacts. Our analysts meet and speak with their industry contacts throughout the year to capture local insight, key market trends, and the 'why' behind the numbers.

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