



WINE INTELLIGENCE

# Sparkling Wine in the US Market

August 2020

REPORT BROCHURE



# PRICING



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# INTRODUCTION

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Strange times abound in the US sparkling wine market. The full impact of the coronavirus pandemic is yet to be felt, either economically or socially, though the first major lockdown period had just ended at the time of the fieldwork for this report in late June to early July 2020.

This research clearly reflects the current mood, with consumers saying they are less likely to attend crowded events in the near future, and will focus more on saving money over the next 12 months. However the immediate post-lockdown sentiment appears to show positive signs for the sparkling category, with recalled purchases of sparkling wine up (albeit from a lower level during lockdown).

The longer-term picture also contains some hopeful signs for the category. Our long-run tracking of the sparkling wine population shows some fluctuations from year to year, but the overall trend remains positive, with more people drinking sparkling wine (and more doing so monthly) in 2020 than in 2018.

Some of the other trends appear to be continuing despite (or because of) the pandemic. There is a long-term trend towards moderation in several alcohol categories, including sparkling wine. The shorter-term trend for sparkling indicates a more complex picture: a slight polarization between a core group of consumers, younger and with a male bias, who are opting for sparkling products on at least a monthly basis, and an older, more female-biased group who are cutting back to only occasional sparkling usage.

Prosecco remains the big growth story, with volumes up 50% since 2015. The awareness and usage stats are also significantly up, and evidence suggests Prosecco still has some way to go before it peaks – almost half of US sparkling drinkers are still unaware of it. For those who do know it, there appears to be lots of scope for innovation: excitement is growing about lower calorie, rosé and fruit or flavored options.

# RESEARCH METHODOLOGY: QUANTITATIVE



The data for this study was collected in March 2017, May 2018, May 2019 and June 2020\*

Data was gathered via Wine Intelligence's Vinitrac® online survey

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 and region

The distribution of the sample is shown in the table

		<i>Mar-17</i>	<i>May-18</i>	<i>May-19</i>	<i>Jun + Jul-20</i>
		<i>n= 1,465</i>	<i>2,200</i>	<i>2,000</i>	<i>1,020</i>
<b>Gender</b>	Male	44%	47%	47%	49%
	Female	56%	53%	53%	51%
	<b>Total</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>
<b>Age</b>	21 - 24	10%	12%	12%	7%
	25 - 34	24%	26%	26%	28%
	35 - 44	14%	19%	19%	22%
	45 - 54	16%	17%	17%	13%
	55-64	19%	13%	13%	13%
	65 and over	18%	14%	14%	17%
	<b>Total</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>
<b>Region</b>	New England	8%	6%	6%	4%
	Middle Atlantic	16%	15%	15%	17%
	East North Central	10%	14%	14%	11%
	West North Central	7%	6%	6%	6%
	South Atlantic	18%	16%	16%	19%
	East South Central	3%	5%	5%	4%
	West South Central	8%	9%	9%	11%
	Mountain	4%	6%	6%	7%
	Pacific	25%	24%	24%	20%
		<b>Total</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>

Wine Intelligence, Vinitrac® US, March 2017 (n=1,465), May 2018 (n=2,200), May 2019 (n=2,000) and June 2020 (n=1,020) drinkers of sparkling wine in the US who drink sparkling wine at least once a year

\* = 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

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