



# US On Premise Wine Report

Highlighting the latest On Premise data, trends, and consumer insights across the Wine Category

December 2022

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Despite an ever-changing and highly competitive BevAl market, wine continues to be a cornerstone of US On Premise consumption, having generated nearly \$15 billion in sales through the On Premise over the latest 52-week period.

However, the wine category is not immune to shifting consumer preferences, inflationary effects or share challenges from competition. Now more than ever, it's vital for winemakers and suppliers to keep a pulse of what is happening in the On Premise to identify opportunities, anticipate changes and capitalize on trends.

CGA by NielsenIQ's US Wine Report utilizes a variety of its signature tools including OPUS, OPM, and Channel Strategy to compile the most actionable and current insights for your executive, marketing, and sales teams.

Whether your team is considering a new brand launch in the market or managing a portfolio of legacy wines, this report will provide a robust set of insights across relevant topics to help you win in the On Premise.

SOURCE: CGA BY NIQ ON PREMISE MEASUREMENT: MEGACATEGORY, Wine, Volume \$, ROLLING 52W TO 08/13/2022





# CGA's Cohesive Approach:

This report will combine outlet, volumetric, and consumer insight to provide a 360-degree view of Wine in the On Premise

## Outlet Exploration

What is the size of the prize and where does the greatest On Premise opportunity lie?

- + How many On Premise outlets sell wine?
- + How many dining and drinking outlets sell wine?
  - + Within the segments where is the greatest opportunity? And how is the landscape changing?

# Utilizing our On Premise Measurement product...

## Volumetric Insight

What types of wine are winning and what should you place focus on to meet demand?

- + For every 10 On Premise BevAI serves, how many are wines?
- + How does wine's share and performance compare to beer and spirits? Exploring share changes over a 3-year period
- + Which regions of the US are significant to Wine? Where does wine hold the largest share of BevAI and sell the most?
- + How do each of the segments perform and how demanded is each?
- + Which countries of origin are most significant? And which origins are the best performing?
- + Red and White exploration, exploring top shareholding and performing:
  - + Varietals
  - + Countries of origin

# Utilizing our On Premise User Study...

## Consumer Overview

Who should you target and what do they want in the On Premise?

Who is the wine drinker and what are their need states?

- + What is the wine drinkers' demographic profile, and how does it compare to beer and spirits?
- + How popular is wine? And how does this compare to spirits and beer?
- + Which types of wine are most popular?
- + How do consumers order wine? Split by total, red and white.
- + Are wine drinkers inclined to consume premium alcohol, and trade up in their wine consumption?
- + What dayparts do wine drinkers, drink in the On Premise?
- + How do wine drinkers interact with innovation? Such as....
  - + Sparkling wine
  - + Wine cocktails
  - + Low ABV/non-alcoholic wine



Utilizing our On Premise User Study...

## Red, White, and Sparkling Consumer Overview

How can you win within Wine colors and types

- + How do consumers interact with Red, White, and Sparkling Wine?
  - + What occasions do consumers drink wine on?
    - + Exploring both food and drink-led occasions
  - + What is the demographic profile of each, and how do they differ from typical wine drinkers?
  - + What factors influence them to purchase?
  - + What are their preferred varietals and countries of origin?
  - + How do they have their wine served? And how much are they willing to pay on a glass and bottle?

# Utilizing our syndicated Custom Research.....

We will commit to incorporating parts of our most recent syndicated Custom Research within, and ensure it is tailored to wine. Previous examples are the Path to Purchase and Channel Strategy studies.

*In the Winter 2022/2023 report we will include*

## Channel Strategy Insight

### Where are the greatest opportunities for Wine in the On Premise?

- + Which channels are wine drinkers most likely to visit?
- + Which channels offer the greatest weekly opportunity for wine?
  - + How often do wine drinkers visit each of the core channels?
  - + Which channels are wine drinkers most likely to visit?
- + How does the wine opportunity differ from other categories in key channels?
- + In the channels where wine opportunity is greatest:
  - + Which wine types and serves are most engaging?

The comprehensive report will provide robust insights and recommendations designed to enable wine suppliers and operators to profitably navigate market challenges.

To find out more please contact



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# Appendix

# CGA's Cohesive Approach:

## OPM (On Premise Measurement):

- + On Premise Total BevAl & Wine Universe overview, sizing up opportunities in the wine market
- + Wine category and sub-category performance: volume, distribution, pricing
- + Period-by-period performance and trends by varietal and country of origin

## OPUS (On Premise User Survey):

- + Wine drinker demographics analysis and trends by red, white, sparkling and champagne
- + Key wine occasions, dayparts, spending, ordering preferences, and need-states
- + Exploration of current trends and hot topics related to wine category and drinker segments

## Channel Strategy Report:

- + Exploration and trending of key wine channels by class of ownership and type
- + Weekly wine opportunities: how and where are wine drinkers engaging in the On Premise
- + Top varietals by channel and visitation trends