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Prosecco DOC and DOCG in the Global Market: Strategic Analysis of Market Dynamics and the Balance Between Expansion and Identity.

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Abstract

Prosecco has become one of the most successful sparkling wines worldwide, representing a cornerstone of Italian wine exports. The global success is usually associated to the whole category, while the distinction between Prosecco DOC and Conegliano Valdobbiadene Prosecco Superiore DOCG remains weak in consumer mind. The two denominations are often conflated in both literature and markets, and only little research has studied the DOCG specifically. The distinctive positioning of DOCG, rooted on its stronger territorial, cultural, and historical foundations; risks to be compromised by this misconception.

To measure the potential impact of this menace, the study adopts quantitative and qualitative methods. From the quantitative perspective, the survey tests consumers factual knowledge of DOC/DOCG distinction, their perceived drivers of quality and preferences for communication channels. From the qualitative point of view, complementary interviews with sector stakeholders along the supply chain provided further context on production dynamics, competitive pressures and ongoing initiatives.

The empirical results are integrated within theories of branding and value transmission, emphasizing the role of geographical indications, storytelling and the concept of slow branding.

The findings highlight three central points. First, consumer knowledge of the DOC/DOCG difference is often limited or confused, and labels are the main practical driver for recognition and trust. Second, consumers base their sense of quality on production methods rather than on the denomination. Third, the values embodied by the DOCG territory, such as heritage, landscape and microclimates, are important levers that are difficult to communicate effectively to final customers.

The final solution proposes product-level adjustments and a coordinated strategy led by the Consorzio capable of aligning wineries and institutions under a common vision, to define a clear identity and compete successfully.

Overall, the research provides empirical evidence from consumer, introduces new theoretical perspectives to Prosecco DOCG segment, and proposes a strategic framework that connects intrinsic and extrinsic factors emerged during the analyses.

The research adds valuable considerations to the existing literature and offer actionable managerial practices to reinforce the identity and the competitiveness of Prosecco Superiore DOCG.

Introduction

Prosecco is now one of the most recognized Italian sparkling wines in the world, characterized by progressive international growth and strong presence in export markets. At its core, the regulatory framework regulates production and ensures that the link with territory, tradition and specific standards is respected.

Within this framework, Prosecco is not a single, uniform product but is structured around two denominations that are significantly different in terms of geography, scale and regulatory requirements.

The key distinction is between Prosecco DOC, produced over an extensive flat area and representing most of the volumes, and Prosecco Superiore DOCG, made in the hills of Conegliano and Valdobbiadene under stricter regulations and with a closer association to artisanal know-how. This dual structure makes the DOCG a relevant case for examining how identity is formed and communicated: its recognition, value creation and transmission, and long-term competitiveness all depend on how the differences from the DOC are understood and conveyed to consumers.

While this distinction is concrete, academic research has tended to approach it as a homogeneous phenomenon, focusing on export growth, consumption patterns, or production trends, but without really examining the internal tensions between DOC and DOCG. This perspective has left many specific challenges of Prosecco Superiore DOCG unexplored; and the risk is that, by being constantly associated with the DOC, the DOCG may lose visibility and recognizability, especially in international markets where consumers often do not have the tools or the education to achieve a clear understanding of this dual denomination system. Such scarce differentiation threatens the ability of the DOCG to create and sustain its identity and position over time.

Starting from these considerations, this work seeks to examine Conegliano Valdobbiadene Prosecco Superiore DOCG as a distinct case, with the goal to acknowledge how its identity can be strengthened and better distinguished from Prosecco DOC. The research focuses on three central questions: how consumers perceive and recognize the difference between the two denominations; which communication tools install most effectively a sense of trust and authenticity in consumers mind; and how the cultural and territorial values of the DOCG can be transmitted to a heterogenous audience. To address these questions, the study adopts a mixed approach, combining a quantitative survey on consumer knowledge and attitudes with qualitative interviews involving sector stakeholders. This framework identifies the weaknesses and the opportunities that could shape the DOCG's future positioning by interpretating consumer perceptions in function of industry practices.

The structure of the work reflects this logic. Chapters 1 and 2 develop the DOC and DOCG in parallel, to provide a comparative analysis that helps distinguishing the traits of each denomination. Chapter 1 introduces the product and its regulatory foundations, presenting more specifically the features of both denominations. Chapter 2 expands the analysis to production volumes, export trends, and market dynamics (as reported in the existing literature), before turning to strategic frameworks: Porter's Five Forces is applied to assess the competitive structure of the industry, while the SWOT analysis complements it by capturing both internal strengths and weaknesses as well as external opportunities and threats, together offering a comprehensive picture of the sector. Chapter 3 shifts the focus to academic concepts that are not often applied in this context, such as branding, customer experience, and the communication of intangible values through storytelling, showing how Prosecco DOCG can be interpreted through theoretical frameworks. Chapter 4 grounds these arguments through empirical research, combining a quantitative survey with qualitative interviews to explore consumer perceptions and sector perspectives. Finally, Chapter 5 draws the conclusions. It consolidates the main findings into a strategic framework that distinguishes between intrinsic and extrinsic dimensions and translates them into actionable managerial implications to reinforce DOCG's identity. Also recognizes the limitations of the research and indicates directions for future studies.

Ultimately, the aim is to explore how a denomination rooted in history and territory can face the pressures of globalization while preserving its unique identity.

1. Introduction to Prosecco

1.1 Historical and Cultural Significance

“A place where vines bud beneath high mountains, their lush greenery shielding the barren rock”. Referring to Duplavilis (latin name for the city of Valdobbiadene), this sentence was pronounced by Saint Venantius Fortunatus back in 570 A.D., emphasizing the strong connection between this territory and viticulture (Fortunatus, Carmina, in Dodd, 2022).

“So precious is this Prosecco of Valdobbiadene that I would not trade it even for the ambrosia of the gods.”
This is how the Venetian poet Aureliano Acanti praised the excellence of the local wine almost three centuries ago (Acanti, Il Roccolo Ditirambo, 1774).

This section explores how Valdobbiadene cultivated this timeless tradition through several historical periods. Before diving into that point, it is important to broaden the perspective and be aware that the origins of viticulture activities in the Italian peninsula trace back to the first relevant interactions with Eastern Mediterranean civilizations. Around the 10^{th} century B.C., both Phoenicians and Greeks transmitted useful cultivation techniques and fermentation methods; for instance, they introduced trellising systems and amphorae-based conservation practices, considered as revolutionary at that time. (Unwin, 1991)
Especially Greeks established colonies in southern regions like Campania and Calabria, whose territories were turned into centers of viticulture and winemaking. These Hellenic settlements and knowledge were later absorbed by Romans, who enhanced the level of oenological activities and spread them throughout the whole peninsula, earning the nickname: “Enotria tellus” (Land of wine) among the ancient writers, stating the centrality of wine in Italy’s culture.
Meanwhile, in the northern part of the peninsula, particularly in the Veneto region, early signs of viticultural activity were already taking place.
Archaeological evidence indicates that wild grapevines were present and likely produced by local pre-Roman communities, even if still in rudimentary forms (E. Dodd, 2022). Yet, it was the Roman northward expansion that represented the very first turning point, from the 2^{nd} century B.C onward, through new road links (such as Via Claudia Augusta) and new social centers (like the municipia of Tarvisium, today know as Treviso) the region experienced an important phase of growth, integrating

its own agricultural system with the one of the empire and enabling the development of a more structured and specialized grape cultivation system (Cellartours, 2023).

From the downfall of the empire and all over the early Middle Ages period, Valdobbiadene’s viticulture activities started to suffer due to political fragmentation and continuous shifting of powers, they were kept alive by the intervention of monastic communities, who preserved ancient techniques and integrated them with new agricultural practices of that time (Unwin, 1991).
Grape cultivation techniques were extended to civilians during the 12th century, when emperor Henry V officially recognized the local autonomies, laying the foundation of a unique system of land governance, based on the so called “Regole”: a self-governing mechanism with collectives that are responsible for managing lands, especially woodlands and vineyards. These small republics fostered collaboration among families enhancing viticultural knowledge and improving the quality of the production, even during challenging times. (Bianchin, 2003)

In the 15th century, with the incorporation of the Veneto region into the Republic of Venice, Valdobbiadene became part of the “Domini di Terraferma”, and the economic significance of viticulture increased (Lanaro, 2006). This period signed an opportunity to exploit the sloped terrain and the favorable microclimate: through mapping activities and early forms of terroir analysis, communities realized that the area was particularly well-suited for grape cultivation. Moreover, the integration of trade routes connecting the hills to Venetian markets allowed viticulture not only to survive but to flourish.
This entire socio-economic configuration also contributed to strengthen wine commercialization practices, along with family-based labor and generational knowledge transfer, opening the way for the involvement of religious and aristocratic institutions. In fact, throughout the 16th century monastic communities and noble estates played a central role in refining viticulture and winemaking techniques, which were recorded and constantly improved in manuals or inventories (e.g., Gallo, Agricolae Dialogus, 1524) (Sereni, 1997).
Although still far from being industrialized, this phase marked a gradual shift from subsistence-oriented viticulture to a more deliberate and quality-oriented production system.

Embracing this legacy, the 17th and 18th centuries witnessed an intensification of vineyard organization. Noble families and emerging landowners started to invest in estate maps and cellar records, at the same time agronomic experimentation promoted a consistently high level of quality (Sereni, 1997). Nevertheless, production remained basically artisanal till the mid-1700s, corresponding in the first key milestone: the formal union of Conegliano and Valdobbiadene in the “Carte Malvolti” in 1772, year from which it is possible to officially use the term “Prosecco” to indicate the local wine thanks to the first written reference that came from Francesco Maria Malvolti (Malvolti, 1772; Dal Bianco, 2015).

During the 19th century, the hills of Valdobbiadene experienced a gradual yet significant transformation, due to two emerging pivotal forces: the boom of silk production and the rise of more industrialized winemaking practices, this dual dynamic reshaped the territory identity. Aristocratic and entrepreneurial families (such as the Piva, to whom Valdobbiadene’s town hall is dedicated) entered heavily in the game and played an historic role in merging traditional farming with new industrial ambition. Their wealth enabled strategic investments in estate management, including organized vineyard mapping, cellar construction and an even more quality oriented approach (Lanaro, 2006).

Around 1850, the first documented bottlings of Prosecco took place at Casa Brunoro, identifying a second key transition from subsistence viticulture to commercial branding and quality control (Dal Bianco, 2015). Concurrently, new innovations such as the bellussera system were introduced, it consisted of high trellises arranged in a radial pattern, allowing better sun exposure and facilitating mechanized labor in flat terrains, thereby optimizing productivity (Cipriani, 2003). By contrast, the hillside plots remained manually tended, a way to preserve the artisanal tradition and reinforce the region’s emerging reputation for meticulous terroir-driven production.

Another milestone arrived in 1876 with the foundation of the “Scuola di Viticoltura ed Enologia di Conegliano”, representing the first viticulture and enology school in Italy. This institute provided, and still now does, technical and scientific support to local winemakers, supporting their ambitions by offering education and helping with research, and later it became a crucial driver of professionalization and experimentation tailored to the environmental specificities of the area (Bavaresco, 2016).

The early 20th century was also a period of institutional and infrastructural progress. One of the most impactful developments was the rise of so called Cantine Sociali, cooperative wineries formed by groups of smallholders or independent grape owners, which enabled the habits of shared winemaking facilities, common resource pooling and technical support, ensuring access to markets for producers who otherwise lacked sufficient means (Fregoni, 2010).

Technological innovations played an equally vital role. For instance, the introduction of temperature-controlled fermentation, and in particular the development of the autoclave (Charmat-Martinotti)

method revolutionized the production of sparkling wines, allowing more predictable and scalable results while preserving the same aromatic freshness (Bavaresco, 2016).
In 1924, the first labeled bottle was created explicitly bearing the name "Prosecco di Valdobbiadene", and it was realized by Carpenè Malvolti winery. It represented a pioneering act of branding that transformed the local wine, perceived as a generic rural product, into a geographically rooted and traceable product. That single label served as a formal declaration of provenance, initiating a broader process of differentiation and quality signaling that would shape future legal frameworks (Dal Bianco, 2015).

The aftermath of World War II brought destruction to much of rural northern Italy, especially in the Piave region. Amidst reconstruction efforts, local winemakers and landowners recognized the need to protect and formalize the Prosecco identity in an increasingly competitive market, reason why they established in 1962 the "Consorzio di Tutela del Prosecco di Conegliano e Valdobbiadene", a collective institution responsible for overseeing production standards, promoting research and defending the name from misuse. The Consorzio quickly became the reference for regional governance in viticulture, setting guidelines on vineyard practices, yield limits and geographical boundaries (Tomasi, 2019).
The inauguration of the "Strada del Prosecco" in 1966 introduced Italy's first formal wine route, linking vineyards with key enological sites. The goal of this visionary project was to make people step into the cultural and artisanal experience of Prosecco hills, in fact, the initiative contributed to the early development of wine tourism in the area, confirming the area's reputation as a place of authenticity and hospitality on international stage.
The result of all these efforts was recognized 1969, when the Italian government conferred the status of "Denominazione di Origine Controllata (DOC)" to the Conegliano-Valdobbiadene production area. It was important not just from the legal side, it was a formal acknowledgement that the region's oenological uniqueness combined with centuries of viticultural knowledge, had created a product worthy of national protection (ISMEA, 2019).
The new DOC designation defined production boundaries on both methods and grape varieties, also imposed strict protocols on winemaking methods to ensure quality and traceability. From the juridical perspective, it is a legal protection to prevent fraud and misappropriation, to ensure that, the name "Prosecco di Conegliano-Valdobbiadene" is included in the framework of Italian excellence (ISMEA, 2019).

By the late 20th century, a more mechanized approach spread all over the country, but Valdobbiadene resisted to the diffusion and maintained its hand-tended vineyards tradition; in recognition of this equilibrium between human activity and natural landscape, the hills of Conegliano and Valdobbiadene were officially inscribed as a UNESCO World Heritage Site. As reported by the UNESCO World Heritage Committee:

"The cultural landscape of the Prosecco Hills is the result of a centuries-old interaction between man and the environment, shaped by a labor-intensive form of viticulture which has become an expression of identity." (UNESCO, 2019).

This accolade celebrates the wine and the entire set of cultural values that had supported it across centuries. The capacity to transmit from generation to generation the techniques, the respect for the land and the work ethic based on passion and values, is what really led to this timeless heritage; making Valdobbiadene's story a living testimony of how tradition can evolve without breaking its roots (Scarpellini, 2020).

1.2 Prosecco DOC vs Prosecco DOCG

After having traced the historical evolution of viticulture in Valdobbiadene, it is time to examine what Prosecco truly is: a distinct sparkling wine category defined by its own technical, legal and sensory characteristics. It is necessary to start from the taxonomy of the word wine: at its core, it is simply the result of the alcoholic fermentation of grape juice. Globally, wines are commonly categorized according to:

- Style (still, sparkling, or fortified).
- Color (white, red, and rosé).
- Grape varieties (single-varietal and blends).
- Alcoholic strength.
- Residual sugar content (dry, semi-sweet, and sweet).
- Vinification method (traditional, modern, and experimental.

This section focuses on one style: the sparkling wine. It is distinguished by its effervescence, a defining trait that stems from a second fermentation, either in bottle (classic method) or in tank (Martinotti-Charmat method), which traps carbon dioxide within the wine, creating its signature bubbles (Anderson, 2013).

Today, Prosecco is one of the most consumed and exported sparkling wines in the world, whose origins are rooted in northeastern Italy. It is produced primarily from the Glera grape, an ancient white varietal historically known as “Prosecho”, from which the modern name derives.

According to law, Prosecco must contain at least 85% Glera, with up to 15% of other authorized varieties permitted depending on the production specification (EU Regulation No. 1308/2013).

What concretely sets Prosecco apart from other sparkling wines, such as Champagne and Franciacorta, is its production method: based almost exclusively on the Martinotti-Charmat process. The technique was firstly developed by Federico Martinotti in 1895 and later refined and industrialized by Eugène Charmat (Anderson, 2013). This technique consists in a second fermentation, carried out in large pressurized stainless-steel tanks, commonly known as autoclaves, rather than in individual bottles as in Metodo Classico. This approach favors the preservation of primary aromas and allows for a more efficient and scalable production (Bavaresco, 2016).

Prosecco can be produced in three main styles, which differ based on their level of effervescence:

- Spumante (fully sparkling, with at least 3 bars of pressure).
- Frizzante (lightly sparkling, between 1 and 2.5 bars).
- Tranquillo (still, no effervescence at all).

The most popular and widely exported version is the Prosecco Spumante, which itself can be further divided based on residual sugar content:

- Extra Brut (0-6 g/L).
- Brut (6-12 g/L).
- Extra dry (12-17 g/l).
- Dry (17–32 g/L).

Brut is currently gaining prominence on international markets as the preferred style for consumption and gastronomic pairings, but traditionally it is the Extra Dry version, characterized by a more balanced softness and delicate aroma, that represents the most authentic expression of Prosecco (Consorzio di Tutela, 2020).
Another noteworthy stylistic distinction lies between Millesimato and Non-Vintage (NV) Prosecco. Most bottles on the market are NV; however, many producers (especially in the DOCG areas) also release Millesimato versions, made from grapes harvested in a single vintage year, indicated on the label. To be labeled in such way, at least 85% of the wine must come from the stated vintage year. Also, Millesimato is often released later than NV bottlings and may undergo towards extended lees aging or fermentation adjustments to highlight character and site specificity (Consorzio di Tutela, 2020).
Officially authorized in 2020, the new variant Prosecco Rosé is a sparkling wine that retains the traditional characteristics of Prosecco while incorporating Pinot Noir vinified as a red wine. This new typology represents a strategic expansion of the category to respond to changing global demand trends, but still not permitted in the DOCG areas (such as Valdobbiadene).

Prosecco production spans among nine provinces across the regions of Veneto and Friuli Venezia Giulia, covering more than 25.000 hectares of vineyards (ISMEA, 2022), but not all Prosecco carries the same weight in terms of quality, identity or territorial specificity. In order to govern this diversity, Italian wine law defines a hierarchy of origin denominations, where at the base is the Prosecco DOC,

established in 1969 and covering the largest production area, at the top are the Prosecco Superiore DOCG denominations, officially recognized in 2009: Conegliano-Valdobbiadene DOCG and Asolo DOCG, which correspond to the topographically distinct hillside zones where the tradition first emerged (EU Regulation No. 607/2009).
These distinctions reflect substantial differences in geography, viticultural practices and regulatory standards. To have a comprehensive understanding of this sparkling wine, it is therefore essential to explore the structured duality between Prosecco DOC and Prosecco Superiore DOCG, not as opposing categories, but as complementary expressions of the same heritage.

The comparative analysis between these two categories reveals that the first significant difference is the territory configuration. Prosecco DOC stems from vast and predominantly flat areas in Veneto and Friuli-Venezia Giulia, where mechanized viticulture is the norm, allowing for large-scale production. Being characterized by a more uniform topography, these lowland zones enable the creation of efficient vineyard layouts and the extensive use of modern machinery. The climate itself is milder and more homogenous, feature that makes Prosecco DOC particularly suitable to produce light and fresh aromas. This style responds well to global demand, which emphasizes consistency and accessibility rather than site-specific expression (Anderson, 2013).
By contrast, the DOCG zones are concentrated within a much smaller and geologically different territory, in particular the hills of Valdobbiadene are shaped by steep slopes, combined with a unique microclimate generated by variable altitudes (ranging from 100 to over 500 meters above sea level) and diverse sun exposures. Yet, the key aspect of DOCG hills is represented by the microclimate itself: vineyards can benefit from a temperate and well-ventilated climate, influenced by the proximity to Prealps in the north and the Adriatic Sea in the south (Tomasi, 2019).
The pronounced diurnal temperature range (the fluctuation between warm days and cool nights) plays a fundamental role by impacting positively on the aromatic development of Glera grapes, a feature that is less pronounced in the flatter DOC areas (Bavaresco, 2016).
These natural conditions foster lower yields but high aromatic complexity, making each parcel of land exclusive on its own. Considering that in this extraordinary landscape mechanization is nearly impossible, manual labor becomes indispensable; and this dynamic has created the phenomenon of "heroic viticulture", a term used to describe the extreme terrains on which the vineyard work is done, even on gradients exceeding 45%. This labor-intensive approach enhances the precision and selectivity of grape harvesting for a more refined wine, and at the same time embody the artisanal spirit of the denomination.

The geographical boundaries are reinforced by stricter production regulations designed deliberately to protect the quality and the identity of DOCG. In Prosecco DOC, authorized yields can reach up to 18 tons per hectare, whereas in DOCG zones the maximum is reduced to 13,5 tons per hectare, and even lower for specific sites (Consorzio di Tutela, 2020). Furthermore, mechanical harvesting is permitted and widely practiced in DOC vineyards, conversely, harvesting in the DOCG areas must be entirely manual, in accordance with the official production regulations ("Disciplinare di Produzione") (EU Reg. 1308/2013).

In terms of vinification, the Prosecco DOC adopts a production model more oriented toward efficiency, volume and consistency, aligned with the needs of a globalized market. The fermentation cycle tends to be shorter, typically ranging from 10 to 20 days. This relatively rapid process helps both to preserve the primary aromas of the Glera grape and to ensure high production capacity and reliability. Despite still relying on the same Charmat technique, Prosecco Superiore DOCG producers usually adopt a more artisanal and quality-oriented approach. The second fermentation is longer, lasting between 30 and 60 days, the extended time in autoclave allows the wine to remain in contact with fine lees, promoting aromatic integration and producing a more persistent perlage. This technique reflects the DOCG philosophy: elevation of Glera's potential through controlled maturation.

Another element that sets Conegliano-Valdobbiadene Prosecco Superiore DOCG apart from the broader DOC denomination is the presence of official sub-zones, which refer to specific geographic areas within the DOCG territory that are recognized for an even more unique microclimatic and soil characteristics (Consorzio di Tutela, 2020).

Among these, the most known is the "Rive" category, introduced in 2009 to formally recognize the steepest and most historically expressive vineyard sites. The term "Rive", from the local dialect meaning "steep slope", refers specifically to 43 delimited crus, each tied to a specific municipality within the hills of Conegliano and Valdobbiadene. According to the Disciplinare di Produzione, these wines must be produced from grapes harvested exclusively within that single locality and must be labeled with both the name of the Riva and the vintage year (Millesimato).

Regulations governing Rive wines are even stricter than those for standard DOCG bottlings: lower maximum yields (13 tons per hectare instead of 13.5), manual harvesting and a later harvest period (Consorzio di Tutela, 2020). As result, Rive Prosecco represents the most terroir-driven expression of the appellation and one of the most prestigious classes of Prosecco.

Arguably the most exclusive is the legendary Cartizze subzone, considered the “Grand Cru” of Prosecco and located in the heart of Valdobbiadene. It covers just 107 hectares across three localities: San Pietro di Barbozza, Santo Stefano and Saccol. The Cartizze hill embody all the ideal features for outstanding viticulture: slope exposure, complex soils rich in glacial moraines and sandstone, all with a mild microclimate, resulting in grapes of exceptional ripeness and aromatic depth (Tomasi, 2019). Due to its extremely limited surface, the prestige associated with the Cartizze name has made it one of the highest-valued vineyard areas in Italian viticulture, with estimates reaching over 1.6 million euros per hectare (Il Sole 24 Ore, 2019). Bottles labeled as Valdobbiadene Superiore di Cartizze DOCG often reach premium prices, both for their organoleptic qualities and for their symbolic status as the pinnacle of the denomination (Dal Bianco, 2015).

As stated, what sustains and legitimizes this hierarchical structure is not only geography or tradition, but the legal framework and institutional ecosystem that uphold it.
At the heart of this system there are the “Consorzi di Tutela”, established to monitor, protect and promote the denominations of origin. For both Prosecco DOC and Prosecco DOCG these bodies play a pivotal role in safeguarding the integrity of production standard and ensuring compliance with strict regulatory guidelines known as “Disciplinari di Produzione”.
The Consorzio di Tutela del Prosecco DOC was established in 2009 and oversees the production area spanning the nine provinces across Veneto and Friuli Venezia Giulia. Its counterpart, originally founded in 1962 as the “Consorzio di Tutela del Vino Prosecco di Conegliano e Valdobbiadene”, later adopted its current name “Consorzio di Tutela del Conegliano Valdobbiadene Prosecco Superiore DOCG”, following the attainment of DOC status in 1969 and DOCG recognition in 2009.
These consortia operate under the supervision of the Italian Ministry of Agriculture, Food and Forestry (MIPAAF), which officially recognizes and delegates to them part of the surveillance authority over the appellation. More specifically, they are responsible for tasks such as technical supervision, promotional activities, legal defense against fraud or misuse of the name and ongoing revisions of production guidelines (EU Regulation No. 1308/2013).
One of the most concrete tools of institutional protection is the “Fascetta Numerata”, consisting of a numbered sticker issued by the government and required on each bottle of DOCG wine. It serves as a mean of traceability, since each Fascetta is linked to a specific bottling batch and producer, it enables verification and quality assurance at every stage of the supply chain. At the DOC level, this control mechanism is optional but still practiced by many producers to improve credibility, especially for export purposes.

Both DOC and DOCG bottle labels must display key information, such as origin designation, vintage (if applicable), producer identity and residual sugar level. Additionally, DOCG bottles are required to include more detailed specifications, for instance the exact subzone (e.g., "Rive di Col San Martino") or the designation (e.g., "Valdobbiadene Superiore di Cartizze") when applicable (Consorzio di Tutela, 2020).

To clarify the differences between the two denominations, the following table summarizes the main regulatory, geographical, and qualitative dimensions that distinguish Prosecco DOC from Prosecco Superiore DOCG.

Prosecco DOC	Key Dimension	Prosecco DOCG
1969	**Year of official recognition**	2009
9 provinces across Veneto and Friuli-Venezia Giulia	**Geographical Area**	Conegliano-Valdobbiadene hills (15 municipalities) + Asolo
~24,000 ha*	**Vineyard surface**	~6,500 ha* (Conegliano-Valdobbiadene) + ~1,200 ha* (Asolo)
50–150 m a.s.l.	**Altitude**	100–500+ m a.s.l.
Mechanized viticulture widely practiced	**Vineyard management**	Heroic viticulture: manual labor on steep slopes
Up to 18 tons/ha	**Yield limits**	Max. 13.5 tons/ha (~13 for Rive and ~12 for Cartizze)
Mechanical harvesting allowed	**Harvesting**	Manual harvesting only
10–20 days (short Charmat cycle)	**Fermentation**	30–60+ days (long Charmat cycle)
None	**Subzones**	Rive (43 crus**) and Cartizze (107 ha “Grand Cru”)
Origin, producer, sugar level, vintage (optional)	**Labeling rules**	Includes subzone or “Cartizze”, vintage mandatory for Rive
Optional (used mainly for exports)	**Fascetta Numerata**	Mandatory on every bottle
Volume-driven, consistent, affordable; global mass market	**Market Positioning**	Premium, terroir-driven, artisanal; symbolic and higher-value

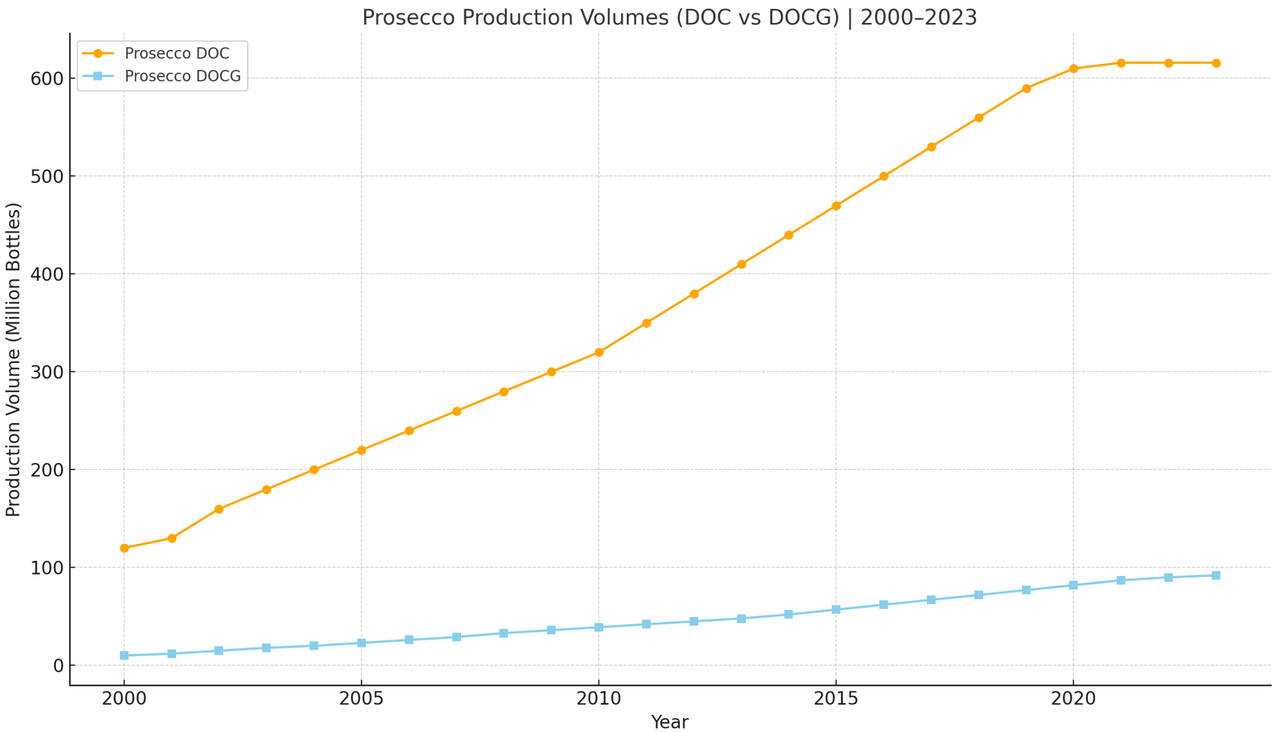
*ha (hectare): a standard unit of measurement for vineyard surface area, equivalent to 10,000 m²

**crus: a term originating from French viticulture, used to designate delimited vineyard sites with distinctive terroir characteristics.

2. Strategic Analysis of the Prosecco Sector

2.1 Industry Overview and Market Trends

As explored in the previous sections, Prosecco has experienced a profound transformation from its ancient roots to a globally recognized sparkling wine. What was once a regional expression of viticultural heritage and tied to the hills of Valdobbiadene and Conegliano, now has evolved into an internationally recognized industry, shaped by increasing global demand, varied consumer preferences and continuous innovation both in production and marketing.
This evolution is not only quantitative but also structural. It comes from the denomination's ability of balancing artisanal identity and scalable production, a condition that enables Prosecco to operate across several market segments and be appealing to both casual consumer and wine enthusiasts.
This successful trajectory comes from the steady rise of production volumes to meet a constantly growing global demand, achieving international success.
The graph below illustrates this trend, showing how overall production has surged over the past two decades, with the DOC and DOCG denominations contributing differently to this growth.



Source: Own Elaboration* (data from Consorzio Prosecco DOC, Consorzio di Tutela Conegliano-Valdobbiadene Prosecco Superiore DOCG, Osservatorio UIV–Vinitaly).
* Data prior to 2009, when the DOC/DOCG distinction was not yet formalized, have been reconstructed from secondary sources and estimates, and should be regarded as indicative.

The production volumes have increased dramatically over the past two decades, rising from less than 250 million bottles in 2005 to nearly 710 million bottles in 2023, registering an average compound annual growth rate (CAGR) of 6%. Usually in mature agri-food sectors, volatility and external shocks constrain long-term scalability, but Prosecco is a case of its own, able to pursue linear growth over the years (OIV, 2023).

Comparing more specifically to other wine categories, which have shown cyclical patterns of boom and regression, it is possible to appreciate Prosecco's expansion curve linear progression, especially from 2010 onward.

This derives from the denomination's ability to adapt to growing demand while maintaining an elastic and responsive production system. It also highlights the increasing sophistication of its export strategy, progressively shifting from opportunistic market penetration to structured international positioning.

The early 2000s represented a preparatory phase: production grew steadily, supported primarily by the domestic base and the progressive opening to foreign markets.

Yet it was in the post-2009 period that the pace of expansion significantly accelerated, coinciding with the institutional reclassification of the Prosecco DOC and the establishment of the DOCG.

Additionally, external economic stressors that typically disrupt agri-food trade did not structurally affect Prosecco's upward trend: during both the 2008 global financial crisis and the COVID-19 pandemic, when high-end wine segments such as Champagne experienced sharp declines in volume and value, Prosecco maintained (and in the DOCG case even increased) its performance (OIV, 2023).

However, this overall growth masks internal asymmetries between the two denominations. Through a more detailed breakdown it is possible to reveal that Prosecco DOC accounts for most of the production, being the true primary engine behind the global boom of the category.

From just over 300 million bottles in 2009, DOC production has surged to more than 610 million bottles by 2023, now representing almost the 90% of total Prosecco volumes (Osservatorio UIV–Vinitaly, 2023). This dynamic has allowed the DOC to shape the global visibility and accessibility of the Prosecco name almost single-handedly.

The strength of the DOC system lies in its production scalability and geographic extensiveness. As a result, the DOC system has developed into a fully industrialized viticultural framework, capable of sustaining vast production volumes with cost-effective structures and consistent outputs.

From a commercial perspective, Prosecco DOC has successfully adopted a mass-market orientation, positioning itself as a versatile product suited to both domestic and international consumption, and leveraged large-scale retail (GDO) and HORECA channels to expand its presence.

Another key strength lies the flexibility of its operational system, producers can offer a wide variety of product formats, from standard 750 ml bottles to single-serving mini bottles, moreover, some players have implemented different packaging styles tailored to satisfy local preferences and be more appealing in markets where purchasing decisions are driven by the aesthetic of the product.
In this way the denomination has managed to position itself across a wide range of consumption occasions effectively, yet this success has led to some criticisms regarding the risk of overexposure and quality dilution. The vast scale of production has raised concerns among critics and professionals about the preservation of typicity and distinctiveness; to reassure consumers and preserve its reputation in more demanding markets, the denomination has implemented internal quality controls and optional traceability measures (such as the use of Fascette Numerate).

Over the past two decades the DOCG production has increased steadily, reaching over 92 million bottles in 2023 (Consorzio DOCG, 2023); nevertheless, the philosophy of growth is based on qualitative consolidation rather than volume expansion (as for DOC). This approach is in part constrained by the limited territorial extension and the artisanal methods that characterize the DOCG denomination, and in the other part by the stricter regulations imposed by the Consorzio.
The presence of sub-zones allows producers to create several variants by leveraging their unique microclimates and soil profiles, increasing the diversification of the portfolio and making it more attractive primarily for consumers and wine professionals who seek for provenance and exclusivity.
From a commercial standpoint, DOCG wines are positioned as premium offerings, with prices around 25% - 30% higher than their DOC counterparts (Italian Wine Podcast, 2025). Their presence is limited in large-scale distribution channels and more concentrated in niches were storytelling play a central role in purchasing decisions.
The strategic importance of DOCG wines is disproportionately high considering its smaller volumes; in international markets like Northern Europe and Japan, Prosecco DOCG is perceived as the “true” expression of the category (Consorzio DOCG, 2023). In this sense, the DOCG functions as a reputational buffer, it elevates the credibility of the entire denomination by embodying higher quality and authenticity.

In essence, the Prosecco DOC and DOCG systems operate within a complementary equilibrium, where scale and identity reinforce each other. On one hand, the DOC has been the engine of global expansion through its industrial scalability, which stems from geographic extensiveness. On the other, the DOCG denomination functions as a qualitative anchor, preserving the artisanal features of the category, and strengthening its reputation in premium segments. Such internal differentiation has not fragmented the Prosecco system, rather, it has allowed it to flourish across both volume-driven and value-driven channels (Banks & Overton, 2010).

The following section will analyze more accurately the most critical levers that support Prosecco's rise on the international stage, with particular attention to how each one contributes to the complementary balance between the DOC and DOCG systems.

2.1.1 Drivers of Prosecco’s International Export Growth

The international success of Prosecco stems from the structural features of its production system. The organizational structure has enabled the denomination to meet the demands of global markets in a way that few other Italian appellations have managed to achieve (Dal Bianco, 2017).
This is made possible by three factors: an expansive production area with favorable topography; the industrial compatibility of the Martinotti-Charmat method; and a supply chain architecture able to integrate activities such as viticulture, winemaking, and distribution.
The core force of this scalability is the high concentration of vineyards located in flatter terrains, condition that lowers production costs per unit and favors more predictable yields, both are essential settings to compete in large-scale retail and export markets.
A further element reinforcing this efficiency is the process standardization. The Martinotti-Charmat method is inherently suited to large volume output. The fermentation process in autoclave allows for better batch control and quick response to fluctuations in demand, in this way production can be programmed in line with market needs in real time, with fermentation cycles that are adapted to consumption trends and logistical constraints.
Finally, the DOC framework has fostered the development of a more vertically integrated and developed production chain, to better coordinate supply and distribution. This infrastructure is adequate to meet the logistical requirements of modern trade: consistent volumes and just-in-time deliveries.

Second, it is true that the DOC system favored rapid international expansion but is the DOCG framework that has preserved artisanal and territorial reputation. The evolution of the category would be incomplete without the parallel emergence of premium tiers represented by the DOCG appellations. In this sense, Conegliano Valdobbiadene Prosecco Superiore DOCG has played a pivotal role in reshaping the perception of Prosecco from a simple and volume-oriented sparkling wine into a distinct category with qualitative depth.
Through manual harvesting and greater attention to terroir expression, DOCG wines demonstrate a higher level of craftsmanship and identity (Checchinato, 2024). These attributes allow the category to position itself credibly in premium and fine wine channels. Through the DOCG tier, and most notably through the wines of Valdobbiadene, the category has gained greater credibility in the eyes of international consumers.

A third pivotal factor is its exceptional adaptability across consumption occasions and market contexts (BPM, 2025); indeed, Prosecco is a very versatile product that suits a broad range of social and commercial scenarios. The main driver of this success is represented by its style and taste: it can be considered very palatable thanks to its aromatic freshness, moderate alcohol content and soft bubbles (OIV, 2020). All attributes that have facilitated Prosecco's entrance into markets traditionally dominated by still wines or beer.

From a marketing perspective this versatility has translated into strong cross-channel penetration: Prosecco performs well both in on-trade environments (such as bars, restaurants, and catering services) and off-trade channels (including supermarkets and direct-to-consumer platforms). Packaging innovation has implemented this dynamic, with the Prosecco DOC system that has capitalized on format diversity: from the classic 750 ml bottle to single-serving mini bottles, more recently even cans, a format that performs particularly well among millennial and Gen Z consumers (Circana, 2024).

A fourth extra enabler comes from the legislative side, where one of the most decisive turning points in Prosecco's trajectory was the institutional reform of 2009. Before this intervention, the term Prosecco was used informally to indicate a grape variety and lacked a unified legal framework capable of protecting its identity in the international market.

This juridical clarification served multiple purposes. First, it established clear geographical boundaries: the DOC was extended to include nine provinces across the Veneto and Friuli Venezia Giulia regions, while the DOCG was confined to the historical production areas of Conegliano and Valdobbiadene (and Asolo, in a separate DOCG).

This move also prevented the uncontrolled use of the name "Prosecco" for producers outside Italy or foreign bottlers sourcing Glera grapes. Italian institutions have successfully challenged the misuse of the term in countries such as Australia, Brazil, and parts of Eastern Europe (European Commission, 2019).

Lastly, throughout the use of certifications, labeling standards, and traceability mechanisms, consumers trust in international markets is reinforced, since these institutional measures act as quality signals for distributors and consumers.

Now that the internal segmentation between the two denominations has been investigated, it is time to analyze the export dynamics and move from theory to market performances.

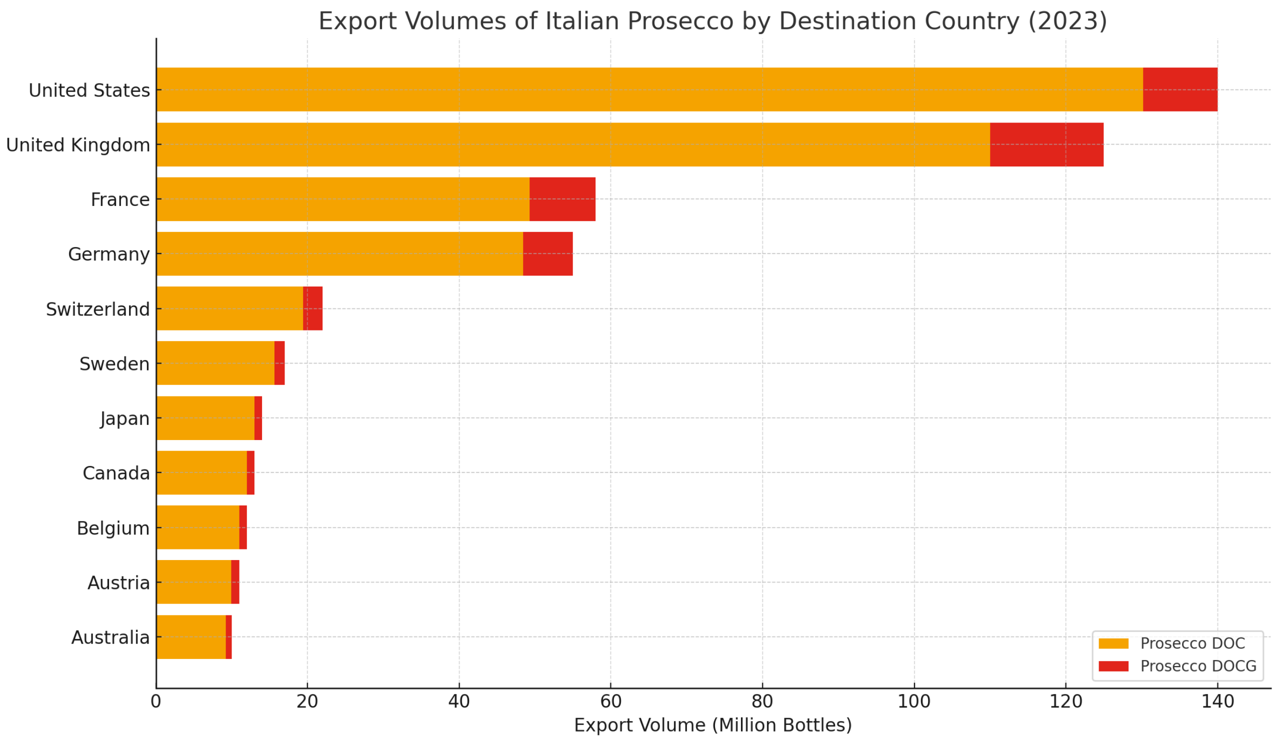
2.1.2 Export Analysis

Considering the past two decades, exports have become the primary growth engine for the category, both in terms of volume and value. Today, more than 80% of total Prosecco production is destined for international markets, a share that significantly exceeds the average export rate for Italian wines, which generally remains below 60%, highlighting once again the true importance of exports for Prosecco (UIV–Vinitaly, 2023).

The difference between many other Italian appellations and Prosecco stands in the fact that Prosecco has managed to structure its growth model around foreign markets from an early stage and not relying too heavily only on domestic consumption.

This internationalization process has been carried out through a strategic lens, which turned Prosecco into one of Italy's most distributed wines around the world, with commercial presence in over 100 countries (OIV, 2022). However, exports are still focused on a limited number of high-consumption countries that account for more than the half of the total (Consorzio DOC, 2023).

This geographic breakdown helps to clarify where Prosecco is most exported and how the two denominations are positioned across different countries:



Source: Own Elaboration* (data from Consorzio Prosecco DOC, Consorzio di Tutela Conegliano-Valdobbiadene Prosecco Superiore DOCG, Osservatorio UIV–Vinitaly).

* Some values are reconstructed from secondary sources or derived through reasonable estimates and should therefore be considered indicative rather than exact.

The chart highlights the absolute volumes exported to each country and the relative internal segmentation by denomination. The first observable trend is that in most markets the DOC alone accounts for nearly the 90% of sales. DOCG volumes tend to be more contained but visible especially in premium-oriented countries, where consumers show a growing interest in terroir-driven expressions (Wine Intelligence, 2021).
Dozens of smaller countries across Eastern Europe, Latin America, Asia, and Africa, are also significant destinations, each absorbing limited but stable quantities, contributing significantly to the overall export.

According to 2023 data from UIV–Vinitaly, the United States imported approximately 140 million bottles of Prosecco.
In the last decade the U.S. market has steadily gained prominence, becoming the worldwide leading destination in terms of volume (Wine Intelligence, 2022). The breakdown of the two denominations reveals that the American market is dominated by Prosecco DOC, which accounts for more than 90% of total volume (UIV–Vinitaly, 2024), indicating that the market's preferences are directed toward wines that are accessible and easy to distribute.
The presence of DOCG wines is gradually expanding and have begun to interest a niche segment, primarily in premium tiers and in urban areas like New York, San Francisco, and Chicago (IWSR, 2023), where it is usually served in wine bars or upscale Italian restaurants, complemented by storytelling and more involving customer experiences (Wine Intelligence, 2021).
The U.S. market has shown responsiveness also to the new category introduction: Prosecco Rosé DOC, characterized by low-calorie and organic variants, and aligned with modern health-conscious trends.
The American market has been functional in establishing Prosecco's global image as an accessible and versatile sparkling wine. Volume growth has been driven by the DOC, but it is possible to witness emerging signals of interest in DOCG products, suggesting a possible evolution toward a more segmented and premium-oriented consumption model in the years to come.

The United Kingdom represents the second-largest international market for Prosecco in terms of export volume, with approximately 125 million bottles imported in 2023, according to ISMEA.
Unsurprisingly, the DOC denomination dominates the British market, accounting for more than 85% of total Prosecco volumes imported (UIV–Vinitaly, 2024).
Despite this mass-market orientation, there are signs of qualitative diversification within the category. DOCG wines have gained visibility but still confined within a limited niche and restricted to fine

dining occasions and among specialty shops. Urban centers such as London and Brighton started to be interested in more sophisticated versions, like Rive selections and vintage Cartizze (Wine Intelligence, 2022).
The UK also represents a valuable market for Prosecco Rosé, which attracts mostly women aged 25-40 (IWSR, 2022). This variant has experienced rapid growth since its introduction in 2020, and even if it does not involve directly the DOCG denomination (excluded by regulation from producing Rosé), it still reinforces the presence of Prosecco as a whole.
From a strategic standpoint, the UK is a market where large volumes of Prosecco DOC are constantly demanded and delivered, and with relatively low entry barrier for producers. At the same time, the shift toward wines with significant origin and identity, despite regarding small niches, could create new opportunities for DOCG Prosecco to gain more visibility.

France is ranked as the third largest international market for Prosecco in terms of export volume with approximately 55 million bottles imported in 2023. Considering France's strong domestic tradition of sparkling wine, led by Champagne, and its reputation for the preference toward national products, the presence in this market is strategically relevant.
The French market is heavily oriented toward Prosecco DOC, which accounts for more than 80% of total volumes imported (ISMEA, 2024). The appeal of Prosecco DOC lies in the cultural contrast it offers with domestic sparkling traditions, of course Champagne continues to dominate formal celebrations and high-end gastronomy, but Prosecco has emerged as a contemporary alternative, often associated with aperitifs and informal gatherings.
Despite representing a smaller share, DOCG wines are also experiencing a phase of expansion, their growth is supported by niche consumer segments who seek alternatives to either Champagne or mass-market sparkling wines.
The Prosecco's adoption in the French market is strategically valuable because being able to penetrate a country characterized by strong domestic bias and highly educated population in terms of wine knowledge, indicates that Prosecco identity and legitimacy are recognized, and it is not simply seen as a cheaper substitute for Champagne. The French market provides a strong incentive to intensify efforts aimed at repositioning Prosecco within premium contexts, while keeping the focus on quality and authenticity.

Beyond the top three export destinations, several smaller markets contribute to the overall export volumes in a significant way. Among these, it is important to distinguish between markets that value craftsmanship and typicity, and others that are marked by rapid growth and expanding demand, so it is possible to group them into three general clusters, each with its own characteristics.

The first pool includes countries like Switzerland, Japan, and Scandinavian markets, which absorb on average between 10 and 20 million bottles of Prosecco each annually. Their volumes are modest, but the strategic importance stems from their role as reference markets for premium positioning. These are contexts with a high degree of wine knowledge, where consumers demonstrate a deep awareness of production methods and quality indicators. The average buyer in these countries is more sensible to labels and certifications, a trait that could potentially elevate the perceived value of Prosecco DOCG. Indeed, in these configurations the DOCG denomination is often the preferred expression, precisely because of its artisanal features and traceable origin.
Large-scale retail plays a secondary role, instead direct-to-consumer sales through specialized e-commerce platforms are performing extremely well in countries like Japan and Sweden (IWSR, 2023).
These countries openness to non-French sparkling wines and their appreciation for craftsmanship and transparency offer fertile ground for Valdobbiadene wines.

A second relevant cluster is represented by countries such as Belgium and Austria, which experienced double-digit growth over the past decade (ISMEA, 2023), highlighting huge potential for strategic development.
The common denominator among these markets is the accessibility and flexibility of Prosecco DOC, thanks to its competitive price positioning and wide availability in mainstream retail channels, it has become the main penetration driver for these markets. Distribution is capillary, driven mainly by supermarkets and by steady diffusion within popular HORECA circuits (UIV–Vinitaly, 2023). In this sense, Prosecco DOC leverages on consumers growing curiosity for international wines without requiring deep knowledge or geographic familiarity, meaning that wine culture is expanding but not yet deeply embedded.
In conclusion, this cluster represents a transitional area in Prosecco's global expansion: not yet mature or deeply segmented, but rich in strategic opportunity. For producers and consortia, these markets offer the chance to build brand equity early and develop new sites of growth outside the more established destinations in Western Europe and North America.

A third cluster of export destinations is composed by countries such as Australia and Canada, which hold relatively important positions in terms of absolute volumes but exhibit an opportunistic consumption pattern. The purchasing behavior of these countries tends to be very price-driven and highly responsive to temporary promotions, limiting the opportunities to install long-term brand engagement and origin awareness (IWSR, 2023).

In this scenario, Prosecco DOC benefits from extensive distribution across supermarket chains, where it is often sold in multi-pack formats or at discount prices, with emphasis on convenience and affordability to catch consumer's appeal. These characteristics have powered the denomination's commercial success in terms of volume but simultaneously have limited the development of brand recognition or product differentiation. The DOCG remains virtually absent from mainstream distribution, with limited visibility even in premium retail channels.

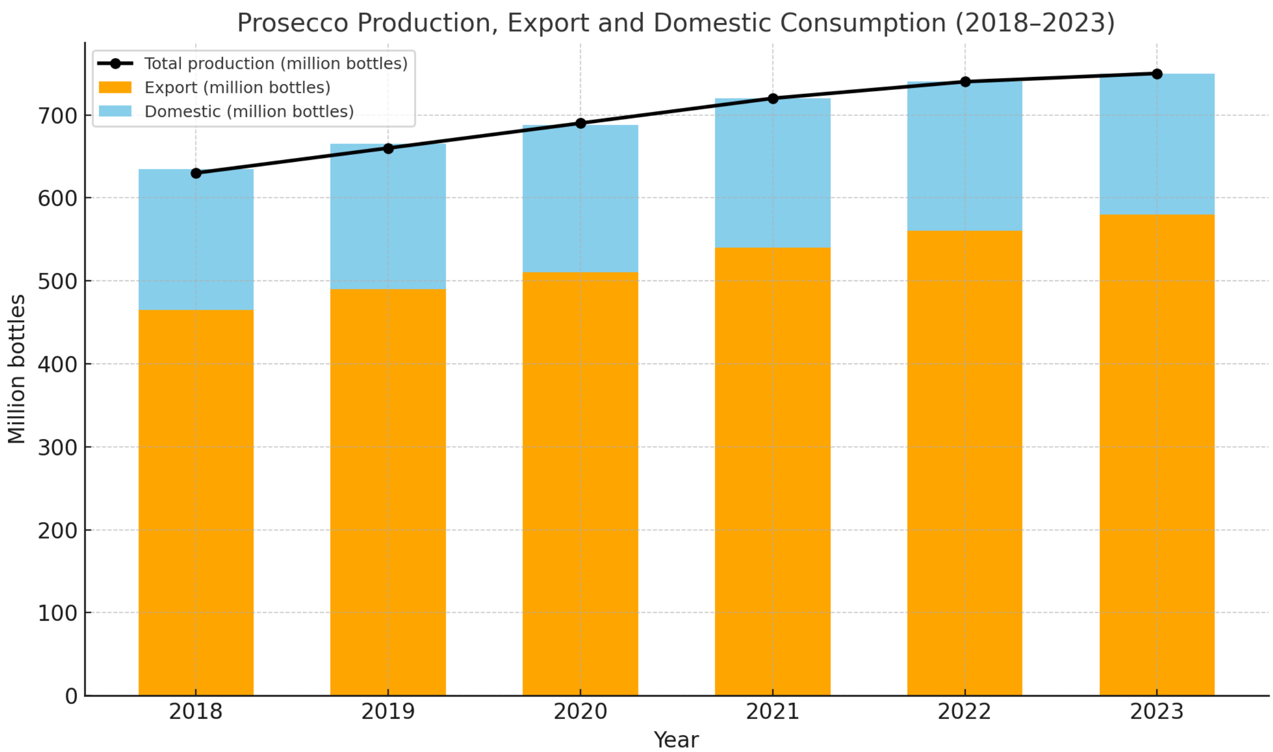
Despite their limitations, these markets are strategically relevant for two reasons. First, they are a secure destination for large-scale production, absorbing supply and ensuring cash flow for producers oriented toward volume. Second, their approach to promotional formats creates favorable conditions for market testing and consumer acquisition.

2.1.3 Domestic Market Overview

To complete the global overview of Prosecco's category, it is now necessary to consider the domestic dimension, since the Italian market remains fundamental to support everyday consumption and overall economic stability.

In the domestic market Prosecco represents one of the most consumed sparkling wines, capable of achieving gradual growth abroad while continuing to preserve a solid share in the national market. Compared to the evolution of many other Italian wines, which tend to reduce their domestic share in favor of exports, Prosecco has balanced international expansion with consistent internal consumption (UIV–Vinitaly, 2023).

The following graph illustrates this dynamic by comparing total production, export volumes, and domestic consumption between 2018 and 2023.



Source: Own Elaboration* (data from Consorzio Prosecco DOC, Consorzio di Tutela Conegliano-Valdobbiadene Prosecco Superiore DOCG, Osservatorio UIV–Vinitaly).

* Some values have been reconstructed using secondary sources or reasonable estimates and should therefore be interpreted as indicative rather than absolute figures.

Observing the domestic consumption, it is possible to appreciate how it has remained relatively constant overtime, consolidating around the 20% threshold (ISMEA, 2023).
Comparing this performance to still wine categories, which in recent years have suffered a gradual contraction in volumes, sparkling wines have been able to move in the opposite direction, achieving growth in volumes and strengthening their presence among consumer preferences (ISMEA, 2024).
The consumption distribution can be divided as follows (UIV–ISMEA, 2023):

- North-East (55%), thanks to geographic proximity to production and strong sense of local attachment to the product.
- North-West (24%).
- Central Italy (12%).
- South and Islands (9%).

Regarding distribution channels, large-scale retail (GDO) dominates the landscape, accounting for approximately 58%, the HoReCa (including bars, restaurants, and hotels) accounts for around 32%, while the remaining share is distributed among enoteche, direct sales from wineries, and an e-commerce platform, which are experimenting a positive moment being the preferred choice for younger and digitally engaged consumers. (Nomisma Wine Monitor, 2023).
In terms of absolute volumes, the domestic market presents a meaningful distinction between the two denominations. Prosecco DOC represents more than 85% of internal volumes (aligned with exports dynamics presented above) (UIV–ISMEA, 2023), often acting as the entry-level option for informal or everyday occasions. Prosecco DOCG instead occupies a more selective niche, where the consumption is often associated with storytelling and immersive customer.
This dualism functions in the exact same way of export markets: DOC sustains volume and continuity, and DOCG reinforces authenticity.
In international markets Prosecco is perceived mainly as a festive or aspirational product, different is the context of domestic consumption, where is instead shaped by routine and cultural proximity.
In Italy, Prosecco is part of ordinary life and people often see it as the standard option among sparkling wines (ISMEA, 2023); such traditional view of Prosecco attributes to the domestic market a unique strategic role: it is both the foundation of the category and the reference point for its evolution.

2.2 Porter’s Five Forces Analysis

The Five Forces model, developed by Michael E. Porter at Harvard Business School and first published in 1979, provides a structured framework for analyzing the competitive dynamics that shape an industry. Rather than examining individual firms, the model focuses on the broader economic dynamics that determine sectoral attractiveness and profitability (Porter, 1979).
The framework is built around five key competitive pressures:

1. Bargaining power of suppliers.
2. Bargaining power of buyers.
3. Threat of substitute products or services.
4. Threat of new entrants.
5. Industry rivalry among existing competitors.

These forces interact continuously, influencing the intensity of competition and the long-term sustainability of market position.
In the case of Prosecco, the model offers an analytical bridge between market dynamics and strategic positioning. Of relevance are the internal segmentation between DOC and DOCG, the structural configuration of the supply chain (including cooperatives, bottlers, and intermediaries), and the asymmetries between domestic and international demand.
Given these structural and strategic differences between the Prosecco DOC and DOCG systems, the Five Forces analysis will be conducted in parallel for both denominations.

2.2.1 Bargaining Power of Suppliers

In Porter’s framework, the bargaining power of suppliers refers to the degree of influence that upstream actors, those providing key inputs, can exert over the value chain (Porter, 2008).
In the context of the Prosecco industry, the notion of “supplier” must be interpreted broadly, including not only grape growers, but also all those who provide essential inputs for the production and distribution process.
The structure of supplier relationships differs notably between the DOC and DOCG systems. In the DOC system the flatter terrain allows for larger and mechanized vineyard practices, shifting the economic balance toward large bottlers and industrial players, who control not only production but also contracts with distributors and retailers (Consorzio DOC, 2024). In the DOCG area, by contrast, the production base is highly fragmented, characterized by hundreds of smallholders cultivating steep vineyards. Lacking the capacity to vinify and bottle independently, many of these growers confer their grapes to cooperatives or local wineries (Consorzio DOCG, 2023).
This asymmetry implies that bargaining power in the DOC is concentrated downstream at the bottling stage, whereas in the DOCG it remains more directly linked to the land and to growers’ role in maintaining quality.

In the Prosecco DOC area, a large share of producers still relies on independent grape growers, many of whom are small-scale farmers that often sell their harvests under annual or multi-year agreements, since they lack the resources to operate independently (ISMEA, 2023).
The market is now experiencing phases of oversupply, with abundant grape availability that reduces downward pressure on prices. The consortia can establish indicative price ranges and quality guidelines, but in the end the final value per kilogram of Glera grapes is set primarily by market forces, reducing small grape growers influence over pricing and resulting in their limited bargaining power.
The definition of suppliers includes the providers of glass bottles, corks, labels, and logistics services. These actors usually hold stronger bargaining power because of their limited specialization and the rising costs of raw materials and supply chain operations, such as higher energy prices impacting glass production (FEVE, 2023) or higher global shipping costs. In a scenario where bottling is practiced on a large scale and relies on standardized formats, this dependence becomes even more pronounced.

Although, many Prosecco DOC producers can negotiate favorable conditions with suppliers through long-term agreements and bulk orders that help diversify sourcing and reduce dependency on any single partner. As a result, the bargaining power of this supplier category can be considered moderate. Considering the small size of most grape growers and the ability of large producers to negotiate with material suppliers, the overall bargaining power of suppliers in the Prosecco DOC system can be ranked as medium to low.

In the Prosecco DOCG area, the production landscape is significantly more fragmented than in the DOC, with a predominance of small, family-run vineyards. As result, only a limited number of wineries are vertically integrated or own large vineyard, while most growers operate independently or within local networks. Most of the grape supply in the DOCG zone comes from independent growers, who sell to large and medium-sized wineries or to cooperative cellars (e.g., Cantina Produttori di Valdobbiadene).
Direct relationships between growers and producers are more frequent and these dynamics foster a more decentralized and relationship driven supply structure, where trust and long-term collaboration play a central role.
Price setting for Glera grapes in the DOCG area is influenced not only by market forces and consortia guidelines but also by the qualitative factors such as vineyard location (especially for subzones such as Cartizze) and farming practices.
Considering that, the higher value of the denomination secures better average grape prices compared to the DOC area, growers hold moderate bargaining power when negotiating with larger wineries, especially in years of limited harvest.
In terms of materials, the DOCG system shares many of the same suppliers as the DOC for bottles, corks, labels, and packaging. However, because most DOCG wineries are smaller in size, they have less negotiating power and often pay higher prices per unit. In addition, many deliberately opt for more refined or artisanal packaging to highlight the premium nature of their product (Procidano, 2021). While this reinforces brand positioning, it also reduces opportunities for economies of scale. As a result, suppliers in this segment maintain a significant degree of influence over producers.
Thus, the overall bargaining power of suppliers in the DOCG system can be considered medium, shaped by fragmentation on the one hand and product premiumization on the other.

Despite these profound differences in the supply chain systems of each denomination, in both cases suppliers does not exert dominant power, as both DOC and DOCG producers have developed mechanisms to balance dependence and maintain bargaining stability.

2.2.2 Bargaining Power of Buyers

The bargaining power of buyers refers to the capacity of customers, whether intermediaries or final consumers, to influence pricing, quality standards, and commercial conditions imposed on producers (Porter, 1979). In the wine industry the definition of buyers can be very broad and can include large volume distributors (like supermarket chains), specialized importers, restaurants, and finally individual consumers, representing the last part of the supply chain. Their level of bargaining power depends on diverse factors such as purchase volumes, brand loyalty and product differentiation.
Since the DOC system is built on high volumes and global reach, it deals mostly with powerful retail chains and international distributors, whose scale gives them relevant negotiating leverage. The DOCG system instead is oriented toward smaller volumes and selective positioning and tends to interact with more fragmented and quality-sensitive buyers, such as wine shops, restaurants, and enoteche.

Large-scale retail groups (GDO), discount chains, and international distributors, absorb most of the DOC production. Considering that they have access to multiple sourcing alternatives, this gives to them higher purchasing power, allowing aggressive approaches in price negotiations, payment terms and even in product specifications (ISMEA, 2023).
The standardization and broad availability of Prosecco DOC make it relatively substitutable in the eyes of mass-market buyers. While the DOC label has some value in terms of recognizable origin designation, it does not offer a level of differentiation or scarcity that could justify premium pricing, and that explain why producers compete mainly through price, packaging, and distribution efficiency, rather than through distinctive product qualities.
Furthermore, the global diffusion of Prosecco DOC has created a scenario in which buyers can select among several suppliers offering comparable products, and because supply is high, retailers and distributors can demand for better deals and more support from producers, especially during periods of oversupply or weaker demand.
To counterbalance this dependence, some DOC producers try to reduce buyer influence by building strong brands, getting certifications, or selling through different channels like direct-to-consumer and partnerships with restaurants (Wine Intelligence, 2022). Still, these are exceptions in a system mostly focused on large volumes and standard products.
As a result, the bargaining power of buyers in the Prosecco DOC ecosystem can be considered medium to high.

In the Prosecco DOCG system, the buyer landscape is notably different. Most of sales occur through more specialized and fragmented channels, implying that buyers operate on smaller volumes and place greater emphasis on product quality, provenance, and craftsmanship, rather than on price alone; for this reason, their negotiating power is limited, compared to the large-scale retail buyers in the DOC segment.

The higher production costs and limited availability of DOCG wines create natural barriers to commoditization (ISMEA, 2023), reducing price pressures. At the same, this model introduces other complexities: often buyers ask for exclusive deals or dedicated attention, requests difficult to satisfy consistently, especially for smaller wineries. On the other hand, these pretentious demands are also key levers to support the producer's positioning, because the client feels more engaged and acquire a sense of brand loyalty and a willingness to pay premium prices.

Overall, while DOCG producers face more selective and demanding buyers, they operate in a market where product quality and uniqueness offer greater protection from price pressure.

In conclusion, buyer power here is more balanced and often shaped by long term relationships and shared values, rather than scale alone; so, it can therefore be ranked as moderate.

The comparison between DOC and DOCG highlights two distinct buyer logics. In the DOC segment, large-scale distributors and retailers hold significant power due to product standardization and supply abundance. In the DOCG context, buyers tend to prioritize authenticity and long-lasting relationships, favoring the creation of brand loyalty with producers, who instead retain more control thanks to product differentiation and scarcity.

In summary, buyer power in the Prosecco category ranges from moderate to high, depending on the denomination.

2.2.3 Threat of substitute product

Within the Five Forces framework, the threat of substitutes refers to the extent to which alternative products can satisfy the same need or occasion as those offered by a given industry (Porter, 2008). In the case of wine, and sparkling wine in particular, substitutes are not limited to other labels within the same category but extend to a wide range of alcoholic (and occasionally non-alcoholic) beverages that compete for consumer attention in similar consumption contexts.

This threat is very evident in the Prosecco sector because it is easily associable to many consumption occasions, where consumer choice is guided more by mood, price, and availability rather than by deep brand or origin loyalty; this means that there is a variety of beverages that can be considered as potential substitutes for Prosecco.

Among the most direct competitors there are other sparkling wines, such as Cava and lower-tier Champagnes, and apart from wine category, ready-to-drink (RTD) cocktails like Campari Spritz, Aperol Spritz, and low-alcohol alternatives (e.g., Hugo or Ginger Spritz) represent another menace, particularly among younger consumers, where they have gained stronger consideration (IWSR, 2023).

Flavored beers and hard seltzers are also a relevant emerging substitute class, since they offer a light and refreshing profile like Prosecco, however, the main difference from Prosecco lies in the fact that they do not have storytelling potential, still they are able to attract consumers through their affordability and constant product and packaging innovation.

Lastly, spirits-based cocktails such as gin tonic, or vermouth-based cocktails such as Americano and Negroni, even if in different occasions, still represent a form of competition among younger consumers and in urban areas (Berenberg, 2022). Their association with contemporary drinking habits make them appealing alternatives for pre-dinner and social occasions, as result, they can steal Prosecco's traditional role in certain consumption moments, even though their impact is less direct compared to other substitutes.

Prosecco DOC is more exposed to substitution threats due to its affordable price and standardized product, characteristics that make it more vulnerable to competition from alternative beverages that satisfy similar needs. For instance, flavored beers, hard seltzers, and RTD cocktails often target the same consumer occasions: aperitifs and casual gatherings, competing not just on price (both alternatives are usually affordable) but on image, they are often perceived as more fashionable and associated to a more modern lifestyle, feature that appeal especially younger and trend-driven consumer.

In addition, Prosecco DOC faces pressure from other sparkling wines such as Cava, which offer similar pricing with a different regional identity, reason why they are often as interchangeable, especially by consumers with limited wine knowledge or less interest on the product traditional traits. For these consumers purchasing decisions are guided more by promotion, availability, or packaging than by denomination's reputation.
The commoditization of Prosecco DOC is a double-edged sword, because while it allows for effective and controlled production complemented by extensive distribution, at the same time it reduces its differentiation and increases its substitutability. Consequently, the overall threat posed by substitutes to Prosecco DOC can be considered significant.

In the case of Prosecco DOCG, wines are characterized by higher average price and strong connection to terroir qualities, attributes that favors a less price sensitive consumption experience and instead more oriented towards cultural and symbolical appreciation of the product.
In fact, DOCG consumers usually demonstrate greater involvement and product awareness, interested in understanding all the values beyond the product, that can deliver authenticity and provenance, and therefore influence their purchasing decision (Wine Intelligence, 2022). A favorable context for DOCG is represented by occasions such as gifts, weddings or in general events with a ceremonial connotation. In these settings, the denomination represents the perfect compromise between perceived premium quality and price accessibility, instead, other alternatives like flavored beers, RTD cocktails, or hard seltzers lack the perceived quality or appropriateness to fit on such occasions.
Also, the purchasing experience can reduce the menace of substitute products, since it usually takes place in specialized channels where product storytelling, guidance, and personal recommendations play a central role, promoting the cultural values beyond the product and fostering brand loyalty.
Given these dynamics, the substitution threat within the DOCG segment remains relatively limited.

The comparative analysis reveals distinct strategic vulnerabilities: the DOC breadth of market and accessibility of product open the door to a wider range of alternatives, many of which compete effectively on convenience or image. Prosecco DOCG, by contrast, operates in a more protected niche, where consumption is guided by the context and the perceived quality, rather than trend sensitivity.
Overall, the threat of substitution in the Prosecco sector can be considered moderately high, though its intensity differs notably between DOC and DOCG.

2.2.4 Threat of New Entrants

The threat of new entrants refers to the ease with which new competitors can enter an industry and challenge established actors (Porter, 1979).

In the Prosecco sector there are several factors that can influence this dynamic, such as initial capital investment, access to land, technical expertise and distribution capacity.

A first barrier is represented by Prosecco's designation of origin (DOC/DOCG), which establish precise geographical boundaries as well as procedural and quality standards (Consorzio DOC, 2024), restricting who is entitled to produce under the Prosecco name and under what conditions, acting as a guarantee of consistency.

Nowadays, the sector is becoming increasingly attractive as result of the growing global demand, nevertheless, entering the Prosecco market requires more than just entrepreneurial ambition: the combination of legal restrictions, territorial scarcity, and high competition significantly narrows the space for new players.

In the Prosecco DOC system, the threat of new entrants is more concrete, mainly due to the vast production area, which offers greater land availability and opportunities for vineyard acquisition or lease.

From an investment perspective, entering the Prosecco DOC segment still requires capital for equipment, regulatory compliance and marketing efforts. However, the standardized production model, centered on large volumes and operational efficiency, reduces complexity and makes the sector appealing to well-capitalized players or new ventures with sufficient financial resources. This dynamic has attracted not only established wine producers, but also external investors seeking to enter the segment through an industrial and commercially driven approach, without necessarily being rooted in the region, as demonstrated by the case of Mionetto, acquired by the German group Henkell (Il Sole 24 Ore, 2008).

Nevertheless, certain structural constraints still act as barriers to entry. Entering in a market characterized by high volumes, intense price competition, and limited product differentiation requires the adoption of reliable distribution channels and compliance with the strict technical guidelines defined by the consortia, making it very difficult to compete effectively in such environment.

Overall, while the Prosecco DOC system does not present insurmountable barriers, it does require financial solidity, operational competence and access to distribution channels. To conclude, the threat of new entrants in the DOC segment can be regarded as present but contained.

Entering the Prosecco DOCG system requires navigating through a complex set of conditions, defined by territorial limitations, higher production costs and cultural factors.
The denomination is confined to a limited hilly area, where the steep terrain requires manual labor for most of viticultural operations, raising operational costs and reducing scalability.
Access to raw materials is also more constrained, since most grapes are cultivated by smallholders with long-standing ties to local producers. Also, the cultural embeddedness makes it more difficult for external actors to gain legitimacy and access to key networks within the area.
From a regulatory perspective, entering the DOCG system requires compliance with stricter quality protocols, including lower permitted yields and tighter supervision by the consortia, who set the rules to preserve the denomination's prestige but also to increase both the complexity and cost to enter.
On the commercial side, distribution methods further reinforce these barriers, with DOCG wines that are often sold through specialized channels, based on trust and reputation: these dynamics tend to favor established producers with strong product reputation, limiting the space available for newcomers.
All things considered, the entry barriers in the Prosecco DOCG segment are considerably higher, they define a competitive environment that is more selective and less open to casual or opportunistic entries. As a result, the threat of new entrants in this segment remains low.

The comparison between the denominations highlights how both structural and cultural dimensions define the accessibility of each segment.
In the DOC area, a combination of larger size of the territory and standardized way of producing, lowers the threshold for market entry: favoring particularly commercial operators with financial resources and industrial ambitions, although it remains challenging to enter and immediately build a solid market position.
By contrast, the DOCG segment presents a more identity-driven structure, where market access is conditioned not only by geographical boundaries and regulations, but also by informal networks and long-standing community ties, settings that makes even more difficult the market penetration by external operators.
To conclude, the overall threat of new entrants across the Prosecco sector can be considered limited, with stronger protection in the DOCG area.

2.2.5 Industry Rivalry among Existing Competitors

According to Porter, industry rivalry refers to the intensity of competition among existing players operating within the same market.

When many producers offer similar products and struggle to differentiate themselves, the competition tends to intensify, and price becomes the main lever to attract buyers (Grant, 2019). This creates pressure on margins and stimulates a cycle of promotions and discounts, risking reducing profitability and fostering short-term commercial strategies; making it harder for producers to build long-term value or brand recognition (Besanko et al., 2017).

In the sparkling wine segment, competition is influenced by internal and external factors, internal factors include the number of active producers, the degree of product differentiation, and the diversity of distribution channels through which the wine reaches consumers; external ones refer to branding strategies, the strength of commercial partnerships, and the capacity to communicate value beyond price (Porter, 2008).

Equally, the perceived prestige and authenticity of a wine's origin play a key role, as they can justify higher price points and incentive consumer loyalty, especially in quality-driven segments.

In the Prosecco system rivalry is shaped by the coexistence of two distinct denominations: DOC and DOCG. Although they both use the Glera grape, they differ in terms of production scale, market positioning and competitive strategies: resulting in two distinct competitive environments, each with its own dynamics and level of rivalry.

The Prosecco DOC segment is characterized by a higher number of market participants, a standardized product and strategies centered on volume; such environment encourages price to become a key competitive lever, especially in mass retail and export channels.

Producers often rely on discounts, promotional campaigns, and private label agreements to secure shelf space or distributor support (ISMEA, 2023), which reduces the average margins and puts pressure on long-term economic sustainability. In many cases, success depends less on product distinctiveness and more on the ability to operate efficiently at scale, although, some wineries still try to stand out through brand building reputation. For instance, Mionetto with its widely recognized "Orange Label" bottle, achieved a status symbol in the DOC market, but these types of efforts usually remain relatively limited in impact.

Overall, rivalry in the DOC system is high, driven by a crowded producer base, limited product differentiation, and strong pressure within key distribution channels.

The competitive landscape in the Prosecco DOCG segment is instead characterized by a lower number of producers, who value quality over volume. Such philosophy, combined with the terroir characteristics, permits a higher degree of product differentiation, reason why DOCG producers prefer investing on building intangible factors, such as reputation and brand identity, rather than competing through standardization and cost efficiency.
Distribution channels tend to be more selective and relationship-driven, meaning that personal connections and brand credibility play a key role, reducing the pressure for competing on better agreements or price discounts.
Competition certainly exists, but it tends to be more contained and shaped by quality features rather than by volume or price; as a result, rivalry among existing competitors in the DOCG system can be considered moderate or even low.

The analysis of the competitive dynamics across the two denominations shows how the producer behavior depends heavily upon the structure of each system: in the DOC system, rivalry push producers toward scalable and commercial strategies, sometimes at the expense of long-term distinctiveness. The DOCG segment presents certain limits (like topography and people networks), which help keep competition more stable, and less oriented towards commercial factors.
All included, rivalry plays an important role in the Prosecco sector. Its intensity, however, depends on the logic of each denomination: stronger and price-driven in the DOC; more contained and reputation-driven in the DOCG.

2.2.6 Considerations

The application of Porter’s framework to the Prosecco sector has revealed a dual competitive structure, deeply influenced by the coexistence of two denominations: DOC and DOCG.
What emerges is a system where external forces do not act uniformly but rather create distinct strategic environments (Porter, 2008).
In the DOC segment: efficiency, standardization, and commercial appeal define the competitive space. Suppliers, despite being generally weak, can still impact costs due to dependencies on materials like bottles, corks, and logistics. Buyer power is strong, rivalry is intense, and barriers to entry are relatively low; all conditions that favor high-volume players with significant financial resources but put pressure on margins and limit long-term differentiation and economic sustainability.
The DOCG system, conversely, presents a more protected and selective environment. Supplier relationships are more trust-based and decentralized and buyer’s engagements tend to be more relationship-driven. Substitutes are less of a threat due to the product’s perceived uniqueness, also competition exists but is generally more stable and focused on reputation rather than price.
Across both systems, the most influential forces appear to be buyer power, rivalry, and the threat of substitutes, each provoking a different impact depending on the denomination.

Understanding these dynamics is essential not only to map the sector’s competitive landscape but also to evaluate the internal strengths and weaknesses of the two denominations, something that Porter’s framework alone does not fully capture.
For this reason, the next chapter will develop a SWOT analysis of the Prosecco sector. The objective is to understand how DOC and DOCG producers can respond strategically, not just to survive within their competitive context, but to evolve in line with their positioning and long-term vision.

2.3 SWOT Analysis

The SWOT analysis (acronym that stands for Strengths, Weaknesses, Opportunities, and Threats) is a strategic planning tool largely applied in both corporate strategy and industry analyses and used to evaluate the internal and external factors that influence the performance of an organization, product, or sector (Gürel & Tat, 2017).

Its conceptual roots trace back in the 1950s and 1960s, although, the framework gained recognition in the early 1970s, under the guidance of Albert Humphrey at the Stanford Research Institute, where it was first developed and tested as a practical tool for strategic planning (Panagiotou, 2003).

It provides a structured and at the same time flexible approach to strategic assessment by dividing the analysis into two dimensions. The internal factors (strengths and weaknesses) are the attributes of the entity or system being studied, while the external factors (opportunities and threats) are represented by the broader environmental or market conditions that lie beyond direct control, and shape the future competitive landscape (Gürel & Tat, 2017).

Companies use this method to set achievable goals, develop a more efficient resource management, and formulate strategies that align internal capabilities with external market conditions (Pickton & Wright, 1998).

The purpose of the analysis is to support informed decision making by identifying competitive advantages, structural weaknesses, market openings, and potential risks.

In practice, a SWOT analysis typically involves four key steps:

a. Identifying internal strengths (e.g., product quality, brand recognition, distribution capacity).
b. Mapping internal weaknesses that may limit performance or competitiveness (e.g., cost inefficiencies, lack of innovation, dependency on intermediaries).
c. Exploring external opportunities (e.g., cost inefficiencies, innovation gaps, or overreliance on intermediaries).
d. Recognizing external threats (e.g., rising competition, substitute products, or market saturation).

2.3.1 Internal Strengths

One of the primary strengths of the Prosecco sector lies in its highly structured production system, regulated through a set of norms that ensure product traceability and the respect of established quality parameters.
On regulation side, the sector benefits from a double layer governance structure: the public regulation is exercised by the Italian Ministry of Agriculture, and the industry oversight is conducted the Consorzio di Tutela del Prosecco DOC and the Consorzio di Tutela del Conegliano Valdobbiadene Prosecco Superiore DOCG. The consortia duties include:

- Define and update the disciplinary production regulations (Disciplinari di Produzione).
- Coordinate annual harvest and yield forecasts.
- Promote the denominations in both domestic and international markets.
- Provide monitoring activities to prevent abuses or misuse of the Prosecco name.

On the production side, one of the most evident competitive advantages lies in the ability to maintain the balance between scale and control, by adapting the production to real time market needs. This is made possible by the DOC extensive vineyard surfaces, efficient management systems, and the widespread use of cooperatives, which allow to meet high levels of global demand while maintaining competitive prices and standardized outputs (ISMEA, 2023). On the other hand, the DOCG zone offers a more artisanal model that emphasizes steep hillside viticulture and manual harvesting. Practices that not only elevates the perceived quality of the product but also strengthen the denomination’s territorial anchoring and premium positioning in the global market (Consorzio DOCG, 2023).

A second strength of Prosecco is how easily it fits into different drinking moments: its lightness and freshness make it approachable for someone new to wine, while still being enjoyable for people who look for something more formal consumption. It can be either poured on its own or mixed into a Spritz, and its prices vary from the entry-level DOC bottles to the more prized Cartizze, still without losing its character. It is precisely this balance that helps Prosecco to stay part of everyday Italian habits, while following global trends (UIV–Vinitaly, 2023).

Prosecco has managed to build a strong reputation abroad, and this has become a key asset for the denomination, especially in places like the USA, UK, and Germany, the name is instantly recognized and linked to the Italian way of life: a mix of elegance, convivial moments, and accessible luxury (OIV, 2023). The use of clear labels and joint promotional efforts by the consortia have helped fix these associations in the minds of consumers (UIV–Vinitaly, 2023).

In recent years, the world of Prosecco has shown also a certain level of environmental responsibility. Both consortia have taken concrete steps in the field of sustainability and innovation, and started to work with universities and technical experts to bring more competence and credibility to their initiatives. A clear example is the Pro.S.E.C.CO DOC project, promoted by the Prosecco DOC Consortium along with academic partners and environmental consultants (Consorzio DOC, 2022), the idea beyond this project is to help producers to keep track of their ecological footprint (water use, carbon emissions, exc…) by lowering the pesticide used in their activities, promoting energy savings practices and more careful water management. On the DOCG side, the Consortium of Conegliano Valdobbiadene has pushed forward similar projects: the Prosecco Sustainability Project, developed with the University of Padua, sets specific targets, like eliminating synthetic nitrogen fertilizers within three years and monitoring soil health with the help of experimental apiaries (Pomarici et al., 2022). These kinds of measures contribute to reduce the environmental impact of production and answer to a wider social expectation: that wine should reflect values of ethics and sustainability, as much as quality.

2.3.2 Internal Weaknesses

Despite its notable strengths, the Prosecco sector still presents structural weaknesses that can undermine its long-term competitiveness, particularly in international markets.

A first structural weakness of the sector lies in the fragmented and only partially industrialized nature of its supply chain. Even in case of large-scale companies like Mionetto s.p.a, one of the most prominent players in the Prosecco segment, most grapes (over 95%) are sourced externally (Del Savio, 2025). As emphasized by Alessio Del Savio, Technical Director at Mionetto, the company relies on a tightly knit network of long-term growers, some of whom have been supplying grapes for over fifty years. These partners are subject to continuous monitoring and quality audits to ensure alignment with the brand's production standards.

The model gives wineries access to large volumes and to a good degree of flexibility. At the same time, it creates a weak point: the reliance on outside grape suppliers, which makes it harder to keep control over aspects like product consistency or to react quickly to environmental challenges. Being able to coordinate also with other external parts, such as bottlers, packaging companies and logistics providers, adds another layer of complexity and prevents vertical integration. The issue is even sharper for smaller wineries, which lack the means to bring these activities in-house, and for many of them, delivering a fully integrated final product remains an ambition rather than a reality. This gap widens structural inequalities and therefore reduces competitiveness in the higher market tiers.

If even a large player like Mionetto S.p.A. outsources the bottling stage[1] (as underlined in the interview with Del Savio), it is possible to imagine that for less structured wineries, this approach is basically unsustainable: it brings delays, inefficiencies, and quality risks that weigh heavily on their competitiveness. As a result, these producers are frequently forced to choose between three alternatives, each with distinct strategic implications.

One option is to handle the entire production process in-house: from winemaking to bottling and labeling. This approach guarantees full control and independence, but requires significant investments in machinery and equipment, costs that often translate into higher shelf prices; consequently, the final product must be positioned in the premium segment, targeting a niche of high-spending consumers, which may not always meet with producer's distribution capacity or brand recognition.

[1] Important to precise that it provides the wine, bottles, corks, labels, and logistics to meticulously safeguard quality.

A second viable path consists in leaning production costs by minimizing the internal setup, allowing for lower prices but compromising the aesthetic and technical refinement of the finished product, therefore making the product suitable only for limited, trusted networks such as local wine shops or direct-to-consumer sales.

The third and most common option, is to give up the idea of independently bottling and branding their own wine; by remaining upstream in the value chain, it is possible to avoid the burdens of final-stage production, reducing operational complexity, but also preventing the possibility to capture added value and building a direct relationship with end consumers.

Over time, such dynamics could lead to increased concentration within the sector by reducing diversity.

A further weakness concerns the strong dependency of the Prosecco DOC segment on mature and highly competitive foreign markets, where mass retail (GDO) plays a dominant role in distribution. In these channels, success often depends on offering competitive prices, as a result, producers are under constant pressure and might prioritize volume over value.

This model, while effective in securing shelf space and driving sales, exposes the system to several risks. The intense price competition reduces margins and makes it difficult to sustain investments in quality, branding, or product innovation.

In a context where differentiation is limited and price is the main competitive lever, the DOC system risks falling into a strategic deadlock: locked into a business model that rewards scale but penalizes distinctiveness. This reduces producers’ capacity to build lasting brand equity, making the category more exposed to competition.

Probably, the most significant structural weakness in the Prosecco system is the absence of a marked distinction between the DOC and DOCG denominations in global markets. This weakness begins at the product level: despite stricter rules on yields, manual vineyard practices, and territorial delimitation, the two wines remain very similar in sensorial and qualitative terms. Differences are often minimum and perceptible mainly by experts or trained consumers, meaning that it is difficult for the normal consumer to recognize a DOCG glass from a DOC one, basing solely on the product. For this reason, the product must be able to transmit a sense of distinctiveness, which may require specific adjustments at the production level. At the same time, it remains crucial that consumers, when approaching the wine, already have a well anchored awareness of the values behind its production, so that their evaluation is more informed and appreciative.

Industry professionals and Italian institutions recognize the DOCG as the pinnacle of quality, defined by stricter production protocols, territorial specificity, and artisanal value, but still strive to translate this added value beyond national borders (Consorzio DOCG, 2023).

In key export destinations like the United States, United Kingdom, and Germany, “Prosecco” is still largely perceived as a single, undifferentiated category, and the awareness of the hierarchical structure within the appellation system remains limited.

According to recent consumer research by Wine Intelligence (2024), fewer than 15% of international Prosecco drinkers can confidently distinguish between DOC and DOCG.

These boundaries severely limit the capacity of DOCG producers to communicate their value proposition. Higher production costs linked to manual vineyard work, lower yields, and sub-zonal distinctions are not adequately reflected in consumer willingness to pay.

The issue is further complicated by the dominance of DOC volumes in international markets. Since DOC accounts for roughly 85% of all Prosecco exported, inevitably it defines the market narrative. In this context, any attempt by DOCG to reposition itself as a premium segment faces resistance not only from consumers, but also from intermediaries, who tend to prioritize price competitiveness, product availability, and fast turnover over qualitative distinctions (Wine Intelligence, 2024).

Ultimately, the insufficient differentiation exposes the strategic potential of the Prosecco DOCG in foreign markets, limiting its ability to secure a distinctive position within the premium sparkling wine category. Without targeted educational efforts, coordinated branding strategies, and stronger engagement with trade operators, the DOCG risks to remain overshadowed by the commercial success of the DOC, despite offering a fundamentally different product in terms of heritage and identity.

2.3.3 External Opportunities

One of the most relevant growth opportunities for the Prosecco sector, particularly for the DOCG denomination, could consist in the strategic expansion toward high-potential export markets. The Prosecco sector still holds unexplored potential in terms of international development and strategic repositioning.

As discussed in the 2.1.2 chapter, the global market can be segmented into mature markets (such as the US, UK, and Germany), emerging markets (like Switzerland, Japan, and Scandinavian countries), and high-potential markets (such as Australia and Canada). While mature markets offer volume and visibility, they also present increasing saturation and price pressure. By contrast, emerging and high-potential markets represent an opportunity for the sector to expand its presence where consumption of sparkling wine is growing, and Italian origin still enjoys strong appeal.

Japan, for instance, has historically valued origin-certified products. According to data from Wine Intelligence (2023), Japanese consumers are more receptive to storytelling, terroir, and artisanal quality, and display a strong preference for refined and culturally rich imports; attributes that are well aligned with the DOCG value proposition and therefore create favorable conditions for the growth.

A second significant opportunity could the development of alcohol-free Prosecco alternatives. This segment has experienced increasing demand across international markets, being characterized by evolving consumer habits, health-conscious lifestyles, moderation trends, and the needs of younger consumers or individuals to abstain from alcohol for cultural or medical reasons (IWSR, 2023).

Although the current regulatory framework in Italy remains a barrier, being the only EU member state that has not yet formally authorized the commercial use of the term “dealcoholized wine” on labels [2] (EU Commission, 2023); initial experimentation has already begun. As explained by Mionetto Technical Director Alessio Del Salvo, the company has been producing an alcohol-free variant for over two years in Germany, and the product has already achieved significant commercial success: 4.8 million bottles produced to date and strong demand particularly in foreign markets, highlighting the potential of this upcoming innovation.

[2] Italy has recently adopted EU Regulation 2021/2117, which authorizes the production of “dealcoholized” and “partially dealcoholized” wines, but important commercial aspects (such as excise duties, label terminology, and marketing guidelines) are still waiting for clarification.

Once approved, these future variants could unlock new consumption occasions, such as business lunches, sporting events, and daytime gatherings; expanding the product's appeal to consumer segments that would otherwise remain out of reach and acquiring the image of a more modern beverage aligned with evolving habits.

A third promising opportunity for the Prosecco sector is the strategic importance of sustainability and digital traceability, especially in international markets where consumers are increasingly pay more attention to ethical production, transparency, and environmental responsibility (OIV, 2023).
In this sense, the development of tools able to enhance transparency, improve production planning, and respond to consumer demand, is already in an advance state; with some producers that have already integrated digital platforms such as Vintrace, eProvenance, and EzLab in their systems to monitor the entire life cycle of the product (Pomarici & Vecchio, 2019).
EzLab is an Italian company that provides blockchain-based solutions to certify the origin and the sustainability of wine. By simply scanning a QR-code on the back of the bottle it becomes possible to access to the traceability record of each product (EzLab, 2022).
Vintrace enables producers to enhance the quality control and to improve data-driven management decisions, by registering and monitoring vineyard activities and ensuring compliance documentation in real time (Vintrace, 2023).
Such technologies help wineries earn greater consumer trust and add credibility to their offer, factors that becomes especially relevant for DOCG producers seeking to stand out through origin and authenticity.

The last and strategically most important opportunity concerns the potential elevation of global awareness and the perceived value of the Prosecco DOCG denomination, which still represents the core challenge to address: the weak distinction perceived by international consumers between DOC and DOCG.
The Consorzio di Tutela del Conegliano Valdobbiadene Prosecco Superiore DOCG has already launched various initiatives, such as the "Ambasciatori del Prosecco Superiore" project. It consists in training sommeliers, importers, and wine professionals to be new representants of Prosecco DOCG abroad, they need to communicate the identity of the territory, the production methods and all the symbolic and cultural values associated to the product (Consorzio DOCG, 2023).
The participation in high-profile international events is also another strategically valuable tool the convey these values, in occasions such as Vinexpo (Paris, New York), ProWein (Düsseldorf), and

Vinitaly (Verona), producers can interact directly with market intermediaries, thereby establishing long-lasting relationships.

Digital tools represent a hidden asset, offering new ways to convey the distinctive identity of the DOCG denomination to an extensive and diverse audience. Several wineries in the Conegliano Valdobbiadene area are already leveraging this opportunity, by investing in innovative storytelling formats, such as virtual vineyard tours, producer video diaries, and interactive platforms that trace the provenance of bottles, opening new channels of interaction and enhancing trust between producers and consumers (Santini et al., 2022). One notable example is the use of augmented reality through applications like Zappar or WineStories, which allow consumers to scan labels and instantly get the access to multimedia content on the wine's origin, production methods, and terroir characteristics (Remaud & Lockshin, 2023). The purpose of these applications is to increase engagement but also to educate consumers, with the aim of sparking curiosity to learn more.

These initiatives together can help reposition DOCG wines. Allowing producers to link their wine to a story of authenticity and origin and building brand loyalty; they can make consumers understand and accept its higher price point.

2.3.4 External Threats

On the assumption that the distinction between Prosecco DOC and DOCG remains scarcely understood in international markets, the most dangerous concern arrives from its strategic consequences: the struggle of DOCG wines to justify their higher prices, leading to a competitive bottleneck. These dynamic risks to generate a structural stagnation of the premium tier, where producers face rising costs without achieving proportional returns in terms of positioning or brand equity (Garzia, Gentile & Slerca, 2024).

Prosecco DOCG currently occupies a transitional space: neither fully mass-market nor perceived as a high-end product. Without a strategic framework able to define and consolidate its positioning, it could be cannibalized into the Prosecco DOC competitive space, where price remains the main competitive lever; or be crowded out by sparkling wines that have a stronger identity. If this trend persists, the long-term viability of the DOCG as a premium segment may be compromised, with producers that could be disincentivized to invest in innovation or sustainability, if not adequately rewarded by the market.

More important, the sector may miss the opportunity to consolidate a double-layer growth model, where DOC continues to drive through volume and accessibility and DOCG diffuse value and prestige.

Meanwhile, the Prosecco sector is living a phenomenon of oligopolization, in which the concentration of market power is progressively shifting towards the hands of a few large players, who benefit of economies of scale and established distribution networks (Anderson & Pinilla, 2020).

This dynamic creates an uneven competitive environment, where small and medium-sized producers struggle to maintain their competitive positioning, lacking the resources needed to compete on the same terms, while bigger players gain traction at their expense: the big get bigger, while the small are left behind.

As a result, the more oppressed wineries are forced to operate in niche segments to avoid being pushed out or to rely on long-standing of personal networks to guarantee the sales flow; options that make it difficult for them to scale or innovate.

The risk is that, if the Prosecco sector will gradually shift toward a more homogenized and industrial model reaching a point of no return where only the most capitalized players are able to prosper,
the marginalization of small producers will weaken the cultural diversity that has historically shaped the success of the denomination; reason why protecting this pluralism is not only a matter of fairness, but a strategic necessity to ensure the resilience of Prosecco segmented system.

The Prosecco sector long-term stability (particularly in the entry-level segment) is under strain by the intensifying competition from other affordable sparkling wines such as Spanish Cava, and Charmat-method wines produced in countries like Romania, Germany, and even Australia (Anderson & Pinilla, 2020). Alternatives that share similar sensory characteristics (moderate alcohol and versatility) and price points, making them direct substitutes for casual consumers who are more interested about enjoyment and sensation and less about denomination or origin.

Prosecco's international success has helped to create global demand for approachable sparkling wines, by contrast, the generated visibility has also lowered the entry barrier for competitors seeking to imitate its model. Markets where consumers have limited knowledge are exactly the contexts where Prosecco is most exposed, because purchasing decisions are driven mainly by price and visual appeal rather than origin or quality indicators (Wine Intelligence, 2023), and the category risks being positioned as a commodity sparkling wine, with competition focused more on price availability rather than on differentiation or lasting brand value.

These considerations highlight the need to strengthen Prosecco's identity through clearer labeling and effective storytelling focused on its value.

A final potential threat to the Prosecco sector (especially for the DOCG denomination) is the uncoordinated implementation of premiumization strategies. In the last period, some producers have tried to reposition their wines in higher-end segments by increasing prices through the promotion of exclusive subzone labels, and by refining packaging to carry out tailored aesthetics more appealing for the markets (Dal Bianco, 2023). A representative example is offered by Mionetto, who has recently introduced the so called "Luxury Collection", consisting in a collection of Cartizze DOCG Dry, presented in an elegant and innovative bottle design specifically conceived to reinforce its identity as a premium product (Mionetto, 2025).

Considering the scarce distinction between DOC and DOCG, premium-priced bottles may appear unjustified to consumers in many international markets, if not complemented with an explanation of their superior attributes.

The absence of a shared strategic framework across the denomination risk to make these isolated efforts generating confusion rather than creating added value: a potential backlash effect, where poorly executed attempts to climb the value ladder, push the category further toward commoditization.

To avoid this epilogue, producers, consortia, and institutional actors to work together to define shared and coherent positioning strategies.

The SWOT analysis highlights a system suspended between consolidation and transformation, where the real challenge for the Prosecco DOCG sector to unlock its potential, is the ability to first consolidate its positioning and then progressively enhance it, not necessarily by choosing between scale and identity, or tradition and innovation, thereby seizing the right opportunities at the right moments.

Global markets are in continuous evolution, and the competitive pressures keep intensifying, the ability to succeed depends on how effectively producers and consortia manage to turn structural imbalances into strategic leverage points.

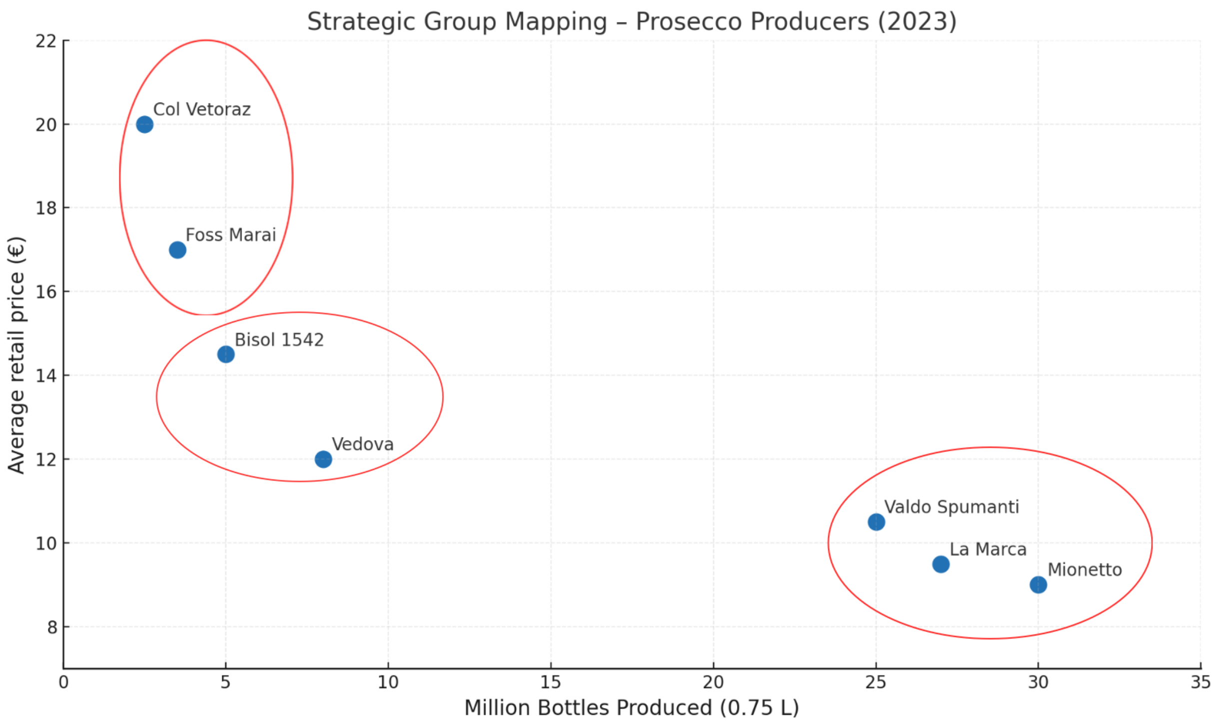
2.4 Producers Strategical Mapping

The sectorial assessment can be completed with a strategical mapping of producers. This approach shifts the focus from external conditions to the internal positioning of firms within the industry, showing how they cluster according to comparable strategies and resources; such clusters are known as strategic groups: sets of firms that pursue similar competitive approaches or occupy analogous positions in the market (Porter, 1980).

The sample of producers is constituted by heterogenous profiles, from large-scale producers, such as Mionetto, Valdo Spumanti, and La Marca, to medium-smaller wineries, including Bisol 1542, Col Vetoraz, Foss Marai, and Cantine Vedova, to ensure a comprehensive picture of the sector is draw.

The strategies of producers can be structured along two dimensions: production scale, measured in millions of bottles produced annually, and average retail price, which reveal their market positioning; these variables capture both the quantitative reach and the qualitative orientation of wineries, providing a reliable framework for strategic comparison.

Data on production volumes were obtained primarily from company financial statements and from the Consorzio di Tutela Conegliano Valdobbiadene DOCG database[3].



Source: Own elaboration* (data from Wine-Searcher, Statista, Consorzio DOCG, and company financial statements, 2023).

* The figures reported are indicative estimates and should not be considered definitive. They are subject to margins of error and serve exclusively analytical purposes within the context of this research.

[3] Estimates of average retail prices were extracted and calculated from specialized online platforms and wine market sources such as Wine-Searcher and Statista, ensuring comparability across players.

The strategic group mapping reveals the existence of three strategic groups among Prosecco producers:

- Large-scale wineries such as Mionetto, Valdo Spumanti, and La Marca, which combine high production volumes with relatively low average prices.
- Premium-oriented wineries like Col Vetoraz and Foss Marai, characterized by limited production and higher price positioning.
- Intermediate cluster, represented by producers such as Bisol 1542 and Cantine Vedova, which balance moderate volumes with mid-range pricing, acting as a bridge between volume-driven and quality-driven strategies.

This classification is influenced by the composition of each winery's portfolio: producers more focused on DOCG labels (Col Vetoraz and Foss Marai) tend to show lower production volumes but impose higher prices, deriving from greater costs associated with hillside viticulture, and resulting in premium positioning. Conversely, companies with a significant share of DOC wines (Mionetto, Valdo Spumanti and La Marca) achieve higher volumes but maintain lower average prices, leveraging economies of scale and capillary distribution networks.

The first strategic group is composed of large-scale producers such as Mionetto, Valdo Spumanti, and La Marca, which are characterized by very high production volumes combined with relatively low average retail prices. From a theoretical perspective, this configuration mirrors what Porter (1980) defines as a cost leadership strategy, in which firms sacrifice premium margins in favor of larger market share.

In this context, economies of scale and extensive distribution networks enable firms to compete primarily on volume, building a competitive advantage based on operational efficiency and the capacity to reach broad consumer segments, rather than in exclusivity.

The breadth of their portfolios, often spanning both DOC and DOCG wines, allows them to cover multiple price segments and resist to market fluctuations. At the same time, this broad positioning weakens alignment with DOCG's premium values, as portfolio extension can dilute authenticity and reduce the ability to differentiate through heritage and terroir (Beverland, 2005).

The second group is represented by Col Vetoraz and Foss Marai, whose strategy rests on a differentiation advantage. According to Porter (1980), in a differentiation advantage setting, the price can serve as a marker of distinctiveness, which allows firms to sustain a premium margin when symbolic attributes are effectively communicated. This is the case of portfolios that are predominantly focused on DOCG, where a higher price point does cover production costs, but it is also a signal of quality and exclusivity, thus reinforcing consumer perceptions of authenticity and rarity.
Their reduced production volumes strengthen even more the perceptions of scarcity, which in turn support premium positioning and closer alignment with the DOCG symbolic values.
However, the reliance on limited volumes and high prices is a logic that exposes producers to market externalities, making them more vulnerable to demand fluctuations and less able to exploit large-scale international distribution networks.

The third and last group stands midway between volume-driven and premium positions, with producers such as Bisol1542 and Cantine Vedova combining moderate volumes with mid-range prices. Here, the competitive logic is less obvious: the practicable competitive advantage depends on internal configuration, investment capacity, and growth ambitions. Strategically, this “in-between” stuck can become fragile if not clarified, it is what Porter defines as “being stuck in the middle” because firms risk underperforming on both cost efficiency and differentiation (Porter, 1980).
To avoid that trap, wineries can decide to follow two distinct paths: scale and efficiency (broadening DOC lines, optimizing processes, strengthening distribution) or premiumization (tightening the portfolio around DOCG, deeper storytelling, enhancing pricing); independently from the direction they will take, their success will depend on the ability to consolidate a clear identity and to turn that identity into a consistent competitive advantage, by communicating it effectively across different consumer segments.

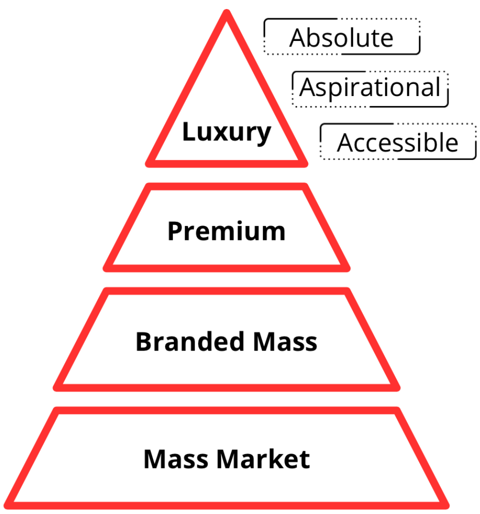
3. Branding and Consumer Decision-Making in Premium Products

3.1 Luxury Definition and Classification

Before examining how brand value is created and perceived in sectors that aim to communicate quality and heritage, such as Prosecco, it is necessary to clarify the meaning and complexity of the term luxury: Luxury is not a necessity, but it responds to a profound human need: the desire to dream, to belong, and to stand out. (Festa, 2024).

Traditionally, it has been associated with rarity and excellence, rooted in the exclusivity of materials, craftsmanship, and access, however, the evolution of consumer behavior and the democratization of aspirational goods have progressively redefined the meaning of luxury: “We are moving from exclusive luxury to inclusive luxury; from having to being; from status to experience.” (Festa, 2024). This evolution has led to the emergence of new segments and interpretations of luxury, which range from absolute luxury to aspirational luxury and accessible luxury, so it can no longer be confined to traditional product categories such as fashion or jewelry; but now extends to sectors such as hospitality, mobility, design, food and more important for the current case: the beverage.

This wider interpretation allows to consider the existence of multiple levels of luxury, each defined by the product’s ability to embody values such as origin, care, and narrative. Therefore, the next step in the analysis will be to classify the different segments of the wine sector, this will favor a better understanding of the positioning of Prosecco denominations.



*Source: Own Elaboration from Bain & Company Material

The application of the multi-tiered framework of luxury to the wine and spirits sector reveals a stratified scenario: at the very top, iconic wines such as Château Margaux and Domaine de la Romanée-Conti, that embody the notion of absolute luxury, combining rarity and cultural prestige (Johnson & Robinson, 2019); most appellation instead occupy intermediate positions ranging from branded mass market to accessible luxury.

Focusing only on the Prosecco system, at the base of the pyramid lies Prosecco DOC, which embodies perfectly the characteristics of a branded mass product: high-volume production, standardized quality, and widespread distribution, making its appeal grounded on accessibility and consistency rather than in craftsmanship or exclusivity. Despite benefiting from strong category awareness especially in foreign markets, its limited narrative and generic territorial framing, place it in the branded mass segment, where price competitiveness and brand familiarity often outweigh heritage or emotional resonance (Wall Street Journal, 2025).

Prosecco Superiore DOCG occupies a more elevated, premium position. Being characterized by hillside viticulture, stricter production protocols, and a deeper bond to historical terroir and community, its quality is expressed in part through technical standards but mainly through tradition and a strong connection to place that surround the product.

At the apex of the pyramid are the Rive selections (such as Cartizze): micro-denominations within the DOCG territory, that can be placed in the accessible luxury segment. Defined by extreme territorial specificities, including manual harvesting on steep slopes, low production volumes and unique microclimate, what really differentiates them are not just these outstanding technical qualities, but the aura created by their symbolic role as icons of the denomination. (Tomasi, 2021).

3.2 Brand role on Premium Markets

What often sets a premium product apart is not just how it is made, but what it represents (Raut et al., 2025). In this sense, concepts like product aura and cultural capital become particularly relevant. The aura of a product stems from the stories, places, and values it embodies, its perceived connection to something unique or timeless. Cultural capital, on the other hand, is defined as the buyer's capacity to recognize and appreciate these qualitative nuances, influencing the customer's willingness to pay a higher price for such distinctive features (Bourdieu, 1986).
Within the Prosecco DOCG system, these attributes already exist but their market impact depends on how effectively they are communicated. Rather than relying solely on quality or origin, producers must activate deeper narratives and emotional associations that help consumers move from simple consumption to symbolic engagement.

In today's premium and luxury markets, the brand is far more than a name or legal trademark, it is a cultural construct. At that point, it becomes essential to distinguish between three related but distinct terms: label, denomination, and brand.

- The label refers to the formal classification of a product (such as DOC or DOCG) which communicates regulatory compliance and geographic origin (Cadel, 2020),
- The denomination represents a shared heritage and collective identity, tied to a territory and its winemaking practices (Scalvedi, 2021),
- The brand goes beyond both, capturing symbolic and emotional resonance, shaping perception not only through tangible attributes but through meanings and stories, it can be understood as "the idea, the story that exists in the mind of customers" (Fei, 2024).

Denominations such as DOC and DOCG have traditionally played a protective function: they guarantee the geographic origin, production methods, and authenticity of a wine. Yet, in today's symbol-driven markets, this technical role is no longer enough. To secure lasting competitive advantage, denominations must evolve from indicators of provenance into strategic brand assets.
This transformation begins with a change of paradigm. The real challenge for contemporary brands is not to simply add meaning to the product, but to become meaning themselves (Fei, 2024). Applied to the Prosecco sector, this suggests that a denomination like DOCG must evolve beyond its role of quality assurance to shape a distinctive identity; in doing so, it becomes an active contributor to brand equity.

This transformation should involve the establishment of clear identity features on a cohesive base: distinctive visual elements and consistent positioning guidelines, able to engage producers, distributors and consumers; this approach would provide a common cultural framework within which producers can articulate their distinctiveness, rather than homogenizing individual brands.

In highly competitive premium markets, this balance between unity and diversity is essential to sustaining relevance over time (Alameda García et al., 2023); concept that is well aligned with the logic of slow branding, which prioritizes meaning accumulation over time and fosters lasting engagement through coherence and care (Festa, 2024).

By adopting a more meaningful and coordinated communication approach, the DOCG denomination can go beyond its role as a guarantee of quality and position itself as a cultural reference.

3.3 Price Perception and Its Role in Premium Markets

In premium and luxury markets, price plays a role that extends beyond the recovery of production costs or the logic of supply and demand. It becomes a strategic tool of positioning that communicates value before the product is even experienced. The price of a good functions not only as a financial figure but also as a form of language: it shapes expectations, orients perception, and participates in shaping brand identity (Kapferer & Bastien, 2012).

This dynamic brings into focus the distinction between functional price and perceived price. The former refers to objective, tangible elements such as materials, production processes, and distribution costs. The latter, instead, encompasses intangible attributes like heritage, exclusivity and emotional resonance (Festa, 2024). In premium contexts, the perceived price often outweighs the functional price, as the consumer is not simply buying a product, but also a story, an experience, or a set of values that transmit emotions.

This is where the concept of willingness to pay becomes crucial. The perceived value attached to a brand determines how much a consumer is prepared to spend, not just for what the product does, but for what it means (Lewis & Zalan, 2014).

In this sense, price is one of the most visible expressions of brand equity. According to the classic brand equity model developed by David A. Aaker, strong brands generate added value through recognition, perceived quality, and emotional association (Aaker, 1991). This added value is not just reflected in consumer preferences, but in the premium price that the market is willing to sustain.

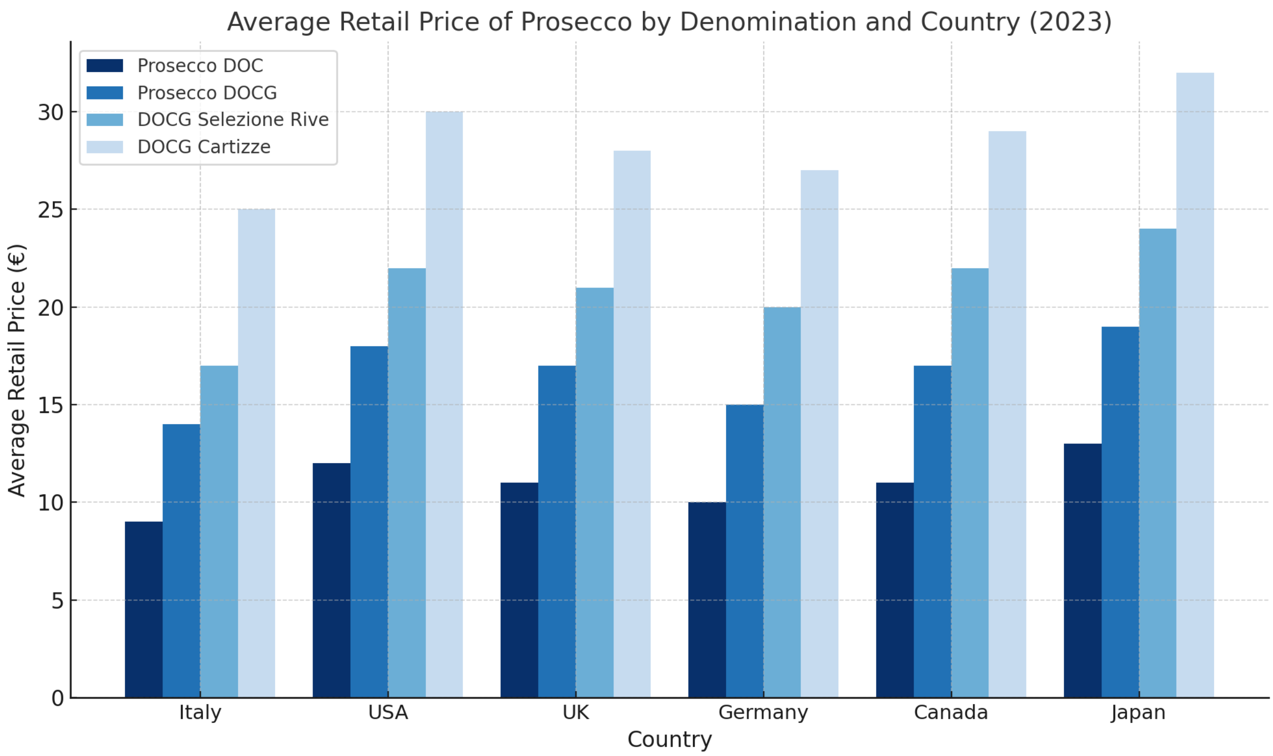
In premium wine markets, consumers often lack the technical expertise to assess the quality objectively. As a result, they rely on external elements, such as price and packaging, to define product's value.

To resume, price is not grounded solely on economic terms but also in relation to what the product represents, as consumers are willing to pay more when it aligns with the values, lifestyle, or sense of distinction they associate with the brand (Fei, 2024).

The DOCG denomination represents a system that is already well-suited to create value through meaning, not just through production quality. Its strong link to territory, tradition, and identity makes it naturally adequate for exploring how intangible elements (like storytelling, authenticity, and reputation) can influence consumer expectations and willingness to pay.

3.3.1 Price in Prosecco Sector

When analyzing the price architecture of the Prosecco category, it is immediately clear that the DOCG denomination occupies a distinct economic tier. Despite both DOC and DOCG wines share a common grape variety and regional heritage, their market trajectories are significantly different. To illustrate these dynamics, the following graph reports the average retail prices of Prosecco across six major markets, distinguishing between the different denominations. Alongside the DOC and the standard DOCG, the analysis includes the Rive selections and the Cartizze cru.
The figures, expressed in euros for comparability, were derived from premium retail outlets and specialized online platforms, and should be understood as indicative averages that provide a coherent framework for market comparison rather than absolute values.



Source: Own elaboration* (data from Wine-Searcher, Statista, LCBO, Consorzio DOCG and Consorzio DOC).
* The figures reported are indicative estimates and should not be considered definitive. They are subject to margins of error and serve exclusively analytical purposes within the context of this research.

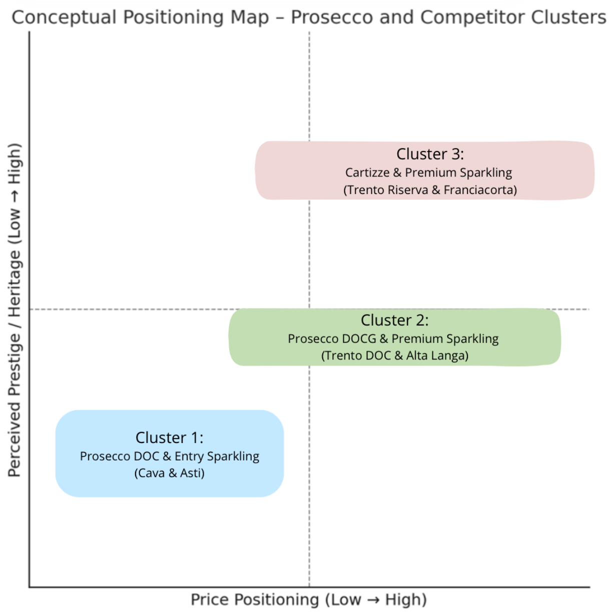
As the graph shows, Italy remains the market with the lowest average prices, reflecting both proximity to production and stronger brand recognition. By contrast, Japan and the United States register the highest average price levels across all denominations, this does reflect the combined effect of higher import costs, premium distribution channels, and the symbolic value often attributed to European wines in these markets (Anderson & Wittwer, 2017).

Germany and the UK occupy an intermediate tier, where extensive distribution networks, long-standing familiarity with sparkling wines and geographical proximity tend to reduce price gaps. Canada, by contrast, shares some structural similarities with these markets, yet its consumers tend to rely more heavily on tangible cues, such as packaging design, rather than on the symbolic or cultural meanings conveyed by the product (Gallucci & Ruggieri, 2024).
These variations confirm that pricing in the Prosecco categories cannot be explained solely by production factors, but depends on the interplay between local consumption culture, import dynamics, and brand perception.

Prosecco DOCG consistently positions itself above the DOC tier in terms of average shelf price, a differential that becomes even more pronounced in specific expressions such as the Rive selections and Cartizze.
The price gap between DOC and DOCG wines is not just the result of higher production costs or logistics derived from volumes but reflects a deeper interplay between tangible production characteristics and intangible market perceptions.
Beyond geography and cultivation reasons, this differentiation is reinforced by the regulatory framework. Compared to DOC, DOCG wines must comply with more stringent rules, such as lower yield thresholds and mandatory hand harvesting.
The premium positioning of DOCG wines shows how symbolic attributes, such as geographical specificity, narrative depth, and limited production, can generate economic value (Kapferer & Bastien, 2012). This ability to engage consumers on both rational and emotional levels demonstrates why DOCG represents a particularly relevant case study for examining value creation in the premium wine segment.

3.3.2 Price and Brand as Drivers of Competitive Positioning

To draw a complete picture of DOCG market positioning now is necessary to broaden the scope of analysis and compare it with other sparkling wines, to investigate how it relates with different categories under the same conditions.
The analysis will not include only the price; it will consider how prestige and accessibility interact to define the denominations' positions across different tiers of the sparkling wine market. The goal is to combine economic features with the image of the product in consumer minds and define the characteristics of each cluster to understand how each denomination can improve its presence.
The figure below is a conceptual map that illustrates how Prosecco categories compare with other sparkling wines; it is structured along two axes: the horizontal axis reflects price positioning from low to high, while the vertical axis represents perceived authenticity and heritage among consumers, from the least perceived to the most perceived.
In this analysis, the three categories of Prosecco, DOC, DOCG, and Cartizze, are associated with clusters of competitors that share similar market dynamics, such as production volumes, market accessibility, perceived scarcity, and the strength of territorial storytelling.



Source: Own elaboration (inspired by Kapferer & Bastien, 2012)

By comparing DOC, DOCG, and Cartizze with clusters of similar competitors, it becomes possible to identify the main dynamics that shape how these wines are perceived and valued. Five key factors emerge as particularly relevant: portfolio hierarchy, perceptual overlap, symbolic markers, micro-territories, and resilience to risk.

The conceptual map highlights the internal hierarchy of value of the Prosecco system: DOC represents accessibility and scale, DOCG embodies premium quality and heritage, and Cartizze signals rarity and micro-territorial uniqueness.
DOC aligns with other high-volume sparkling wines such as Cava or Asti, DOCG positions itself alongside categories like Trento DOC or Alta Langa, and Cartizze approaches niche prestige wines such as selected Franciacorta cuvées or some Trento reserves, stating its role as pinnacle of the ecosystem.
This progression represents a classic premiumization ladder (Kapferer & Bastien, 2012), it is a branding theoretical framework in which each upward step offers consumers improvements from technical side and in terms of heritage.

The most important thing that the map highlights is the perceptual overlap between DOC and DOCG: many international consumers struggle to recognize DOCG as a separate category with its own cultural and symbolic weight, or recognize it, but simply as a marginal improvement within the broader Prosecco category.
For instance, Trento DOC has succeeded in establishing a strong reputation that differentiate it from other sparkling wines, while Prosecco DOCG still have difficulties to get rid of the mass-market image of Prosecco DOC. If this persists, it risks being undervalued with respect to its true qualitative and cultural distinctiveness.
Addressing this perception gap requires repositioning DOCG as a category with its own premium identity. Only by affirming this distinctiveness it can avoid being overshadowed by both the mass-market associations of DOC and the established prestige of the peers in its cluster.

Symbolic markers such as design, packaging, and storytelling play a decisive role in shaping how each cluster is perceived.
For Prosecco DOC, the often-generic look of bottles reinforces its role as an accessible everyday sparkling wine but limits its ability to move upmarket. In the DOCG cluster, visual identity and storytelling become central to signal distinction, yet the execution remains underperformed, with some producers still not communicating properly the terroir specifies, the artisanal work and the heritage beyond final product. In the prestige tier, Cartizze and comparable sparkling wines demonstrate how symbolic elements can transform scarcity into cultural capital: exclusive packaging, selective distribution, and stories tied to rarity can justify higher prices and therefore build cultural capital.

Micro-territories such as the Rive and Cartizze represent a crucial opportunity for DOCG to strengthen its positioning. Rather than being absorbed into the mass-market image of Prosecco DOC, these sub-zones can act as flagships for the denomination, signaling exclusivity and helping lift the perceived value of DOCG. Cartizze holds the potential to function as a prestige reference point on its own system, much like the role played by "cuvées de prestige" in Champagne.
By exploiting the enhanced role of micro-territories, DOCG producers can turn what may seem like isolated distinctions into a unified framework of excellence.
If communicated effectively, Rive and Cartizze are not just niche variants, but strategic levers to reposition the entire DOCG denomination apart from DOC.

The resilience of each cluster, as well as the risks it faces, depends on its structural characteristics.
Prosecco DOC, supported by scale and global distribution, shows strong resilience in terms of volume but remains exposed to the risk of commoditization, which may reduce perceived value. DOCG producers operate in a more fragile balance: their premium aspirations rely on symbolic capital and controlled production, yet this positioning is vulnerable to perceptual overlap with DOC and to competitive pressure from more established appellations like Franciacorta and Trento DOC. At the top, Cartizze demonstrates the greatest potential for symbolic differentiation, but its high dependence on consumer recognition of rarity also makes it the most exposed to demand fluctuations and inconsistent international awareness.
Considering these dynamics, the resilience of the DOCG system will depend not only on the quality of its wines, but on the ability to manage risks through coordinated strategies of communication, distribution, and brand identity building.

The map shows that while Prosecco can address multiple market segments, its long-term success will depend on how effectively each denomination is able to define its role and compete within its own environment. For DOCG in particular, the path is longer and more complex: establishing a clear and recognized brand identity, similarly to what achieved by more established competitors, is the necessary first step. Once this is done, the denomination can leverage its full potential through the symbolic and territorial assets it already possesses by turning micro-territories into powerful ambassadors of authenticity and drivers of the denomination's premium repositioning.

3.4 Customer Experience as a Strategic Lever for Prosecco DOCG

In today's competitive markets, where product quality is largely taken for granted and functional differentiation is increasingly limited, Customer Experience (CX) has become a key strategic lever for generating value (Lemon & Verhoef, 2016). This concept can be applied in wine premium segments, where perceived value often outweighs material attributes, and where emotional elements play a central role in shaping consumer decisions.

Customer Experience are the impressions, perceptions, emotions, actions, and reactions a customer has while interacting with a company through any touchpoint (Fei, 2024). It is not limited to the act of purchase but extends across the entire relationship journey, where each moment of contact contributes shaping the brand's identity in the mind of the consumer and, ultimately, influences loyalty, advocacy, and willingness to pay (Lemon & Verhoef, 2016).

Unlike traditional marketing models: centered on functional benefits and rational behavior, modern CX shifts the attention on how value is created and perceived. This transition can be described as a movement from Homo Oeconomicus to Homo Ludens (Fei, 2024). In the traditional view, consumers were seen as rational agents focused on price, product utility, and able to make effective comparative evaluation considering all the features involved; marketing strategies were designed around functional performance and tangible attributes to generate differentiation.

The experiential approach views consumers as emotional beings who seek enjoyment and engagement, able to feel emotions and not perfectly rational. The emphasis moves from product quality to the quality of the experience, from objective benefits to emotional resonance, with the final goal of generating feelings in consumer mind that will drive the purchase decision.

In sectors like wine, where it's not always easy to judge quality in objective terms, the perceived value becomes a meaningful strategic lever. In the premium segment, what makes a product valuable is the context that surrounds it. To exert emotions among consumers, factors such as the story of the producer or the beauty of the place where it was made, become essential to present the product in an engaging way.

Therefore, many brands are moving away from a product-centered framework and are instead concentrating their efforts to design the customer journey with a different approach, where every touchpoint, whether online or in person, must be carefully managed to ensure engagement.

Customer Experience should be interpreted as a strategic investment for the long-term brand equity (Lemon & Verhoef, 2016), since it allows companies to create deep, lasting relationships with their audience by giving meaning to every interaction.

3.4.1 Wine Tourism as Customer Experience

In the case of Prosecco Superiore DOCG, this kind of customer experience is not just a theoretical opportunity, but a concrete direction that many producers have already embraced through dedicated on-site spaces and wine shops.
Although its full potential remains underexploited; the Conegliano–Valdobbiadene DOCG area is currently in a take-off phase for wine tourism, according to the 2023 Economic Report by the Consorzio DOCG, wine tourism activities grew by 16% in 2023. This figure suggests that the area is gradually becoming a tourist destination for alternative forms of travel, and hospitality initiatives are also playing a pivotal role in welcoming visitors by enhancing their engagement with the territory.
A survey conducted by Giampietri, Donà Dalle Rose, and Morlin (2018) across 150 wine tourists has demonstrated that:

- Visitors who felt emotionally connected to the winery and its landscape were more likely to describe their visit as memorable and recommendable.
- 70 % of respondents ranked emotional connection or sense of place among their top three motivators.
- 65 % expressed a strong intention to return or to suggest the region to friends.

These data should encourage producers to structure tasting experiences that are immersive and memorable, as they become strategic tools to enhance perceived value and foster long-term word-of-mouth.
Mionetto and Bortolomiol are representative examples. The former has recently renovated its historical Borgo to create a multi-functional spot, that hosts a wine bar with dedicated tasting areas and panoramic terraces from where it is possible to admire Valdobbiadene hills (Mionetto, 2023). Visitors are guided by experts through curated storytelling and thematic formats to educate consumers and foster product awareness (Mionetto, 2023).
To show how customer experience can simultaneously support sustainability, the whole space has been redesigned with attention to sustainability, using eco-friendly materials and energy saving solutions.
Bortolomiol hospitality project is based in the restored Parco della Filandetta, an ex-silk factory in the heart of Valdobbiadene. This site combines nature and contemporary art, visitors can walk through sculptures and installations before entering the tasting space, where Prosecco is presented as a cultural experience with deep roots in its territory rather than as a simple wine.

Most of these experiences operate independently, with each winery building its own narrative, creating its own experience, and attracting its own audience; the absence of coordination limits the denomination's potential to communicate a shared premium identity to both domestic and international visitors, weakening the overall impact of these initiatives.
As explained in the previous chapter, the sector is facing a growing polarization, where larger wineries, supported by stronger financial resources and organizational capacity, can design and promote sophisticated experiential formats. Conversely, smaller producers struggle to keep up and compete in this domain due to limited infrastructure and staffing.
As a result, there is a concrete risk that customer experience could spread the gap between the strongest and the weakest players in the denomination if not coordinated by a unified framework.
By understanding that the customer experience is a collective competitive tool rather than an individual brand asset, it would be possible to create more value for the whole denomination, with benefits shared across all producers; thus, this requires vision and collaboration.

3.4.2 Prosecco Brand Ambassadors

One of the most promising directions for strengthening the international presence of Prosecco Superiore DOCG, is the creation of well-trained brand ambassadors who can represent the denomination. In a sector where many consumers lack the knowledge to distinguish DOCG from DOC, the human element becomes crucial. A skilled communicator who can narrate the product's story, highlight the values of the denomination, and convey its uniqueness with passion and credibility can have a decisive impact (Kapferer, 2012).

In the case of Conegliano–Valdobbiadene, the figure of the ambassador could be organically integrated into the cultural and commercial ecosystem of wine. Potential candidate to cover this role are, for instance, sommeliers, export managers, wine educators, that could space among a more technical dimension; chefs, hoteliers, and travel consultants, could instead occupy a more experiential spot. Once educated, they are equipped with the right knowledge and emotional connection to the territory to communicate the denomination's values to the audience with clarity and credibility.
To make this initiative effective, the support of local institutions becomes crucial, the Consorzio di Tutela could identify suitable profiles and regional training centers could therefore offer them tailored educational programs, concluding with the release of a formal certification.

Ambassadors must be able to translate DOCGs specifies into messages adapted to different audiences, an ability that goes beyond technical competencies and include public-speaking skills. Always being mindful of potential pitfalls: on one side, the risk of improvisation, where anyone might claim to represent the denomination without proper training, can weaken the general credibility. On the other side, too much control over the communication process can produce messages that sound scripted or inauthentic.

The real opportunity born when a diverse yet credible network of ambassadors, capable of speaking authentically, perform at major wine events. Locally, they can represent the denomination during regional fairs like the Mostra del Vino, held annually in Valdobbiadene and nearby towns; but greater effect is generated when they participate to international industry showcases, such as Vinitaly in Verona, which in 2024 welcomed over 97,000 trade visitors from more than 140 countries (Vinitaly, 2024) or Vinexpo Asia, where the 2024 edition in Hong Kong recorded 14,203 trade visitors from 60 countries (Vinexpo Asia, 2024). These contexts are ideal to share real stories to a more interested public, but also to engage with multiple stakeholders through media resonance, and finally to ensure consistency and coherence in how the denomination is presented globally.

Ambassadors should represent the denomination in all its variety, by giving voice to both larger wineries and smaller ones, without privileging one at the expense of the other; by explaining with real examples how traditions and territories shape the wines, making it easier for consumers to see why denominations are different; and finally by fostering denomination growth abroad consistently with its values and identity. It’s not just about expanding into more markets, but about doing it the right way.

3.4.3 E-Commerce and Digital Storytelling for Prosecco

Online sales represent a purposeful tool able to both improve the commercial performance of the denomination and to convey storytelling and brand experience with extensive reach (Karampournioti, 2022).

However, producers in the area still approach the e-commerce channel in a basic way, limiting themselves to simply display standard catalogues and transactional interfaces on their websites, refusing to explore the potential of innovative platforms for customer engagement.

Winery websites tend rely on outdated designs with little emphasis on storytelling, often characterized by scarce information about the wine's origin or the distinctive features the make each label unique; as expected, the result is an ineffective digital presence.

This gap will be bridged only when wineries will begin to view e-commerce as part of the overall customer experience, building platforms that are more dynamic and immersive, capable of combining functionality with rich-content layouts based on storytelling. These platforms have the goal to humanize the product and create emotional engagement, elements like short videos or short stories about the families and communities behind the wine, make it easier for people to identify with the culture behind the denomination. By applying interactive features such as guided virtual tours or high-quality edits of the product, consumer feel they are closer to the territory and its values.

Online sales strategies must evolve, and shift from being purely transactional to relational and narrative. The concept of editorial commerce, which emphasizes the integration of storytelling into digital retail could be the right solution (Rocamora, 2017), in concrete terms, instead of simply showing a list of wines, the platform should incorporate stories, seasonal selections, producer insights, and food pairings, all within a better structured e-commerce environment, to guide consumers toward more informed and engaging choices.

Should one wish to go beyond, a more refined approach would embed real-time reviews or interactive Q&A sessions, to turn online platforms into spaces of dialogue rather than simple points of sale, thereby helping consumers feel part of the brand community.

The integration of e-commerce channel could be a lifeline even for smaller players, who don't have the budget or the resources to develop advanced systems on their own. By developing a common platform where multiple wineries would be featured together, each would have the opportunity to share its identity through a dedicated space for storytelling, videos and events. With this solution, smaller players avoid being overshadowed by bigger ones, benefiting from a joint initiative that gives visibility to their work and show that the denomination knows how to work together, to grow without losing its identity.

4. The Identity Challenge of Prosecco Superiore DOCG

4.1 Introduction and Research Question

In the previous chapters the Prosecco Superiore DOCG system was examined from multiple perspectives: historical evolution, geographical and technical boundaries of production, market positioning, and strategic role of experiential branding. This comprehensive analysis has highlighted the richness and complexity that set the DOCG denomination apart in terms of cultural heritage and territorial authenticity.

At the same time, the investigation has revealed a critical issue: despite the efforts by producers and institutions to emphasize values like tradition, craftsmanship, and terroir, these distinctive traits are not always clearly perceived or understood by the market, failing to resonate with consumers and intermediaries, especially beyond Italy's borders.

This misalignment is not merely a matter of brand awareness, but of how value is built, communicated, and received along the supply chain, from the vineyard to the final consumer. Bridging this gap requires more than marketing; it demands cultural clarity, educational efforts, and strategic coherence across stakeholders.

This situation raises a fundamental question that drives the research of this chapter:

How well do consumers and market intermediaries recognize and understand the identity of Prosecco Superiore DOCG, and which factors and communication levers account for the perception gap with Prosecco DOC?

To address this question, the chapter combines quantitative analysis (based on a consumer survey) with qualitative insights (from semi-structured interviews). The aim is to assess the perception gap, understand its causes, and identify practical levers to reinforce the identity of Prosecco Superiore DOCG, since clarifying where and why the disconnection occurs is crucial for effective positioning and long-term competitiveness.

4.2 Research Hypothesis

Building on the research question introduced above, the following hypotheses were formulated to test specific aspects of the perception gap between Prosecco DOC and DOCG. These hypotheses are organized into two categories: factual hypotheses, which can be tested through objective measures of knowledge and socio-demographic effects, and exploratory hypotheses, which investigate the attitudinal drivers and communication preferences shaping consumer perceptions.

Factual hypotheses

1. H1 (Territorial heterogeneity). Factual knowledge and perceptions differ significantly between respondents living in or around Valdobbiadene and those residing elsewhere. Local exposure to the production area generates a higher degree of awareness and accuracy in distinguishing between the two denominations.

2. H2 (Demographic effects). Socio-demographic characteristics, such as age and education level, influence the probability of correctly identifying the difference between DOC and DOCG.

3. H3 (Over-claiming knowledge). Among those who declare that they know the difference between Prosecco DOC and DOCG, a substantial proportion fails the factual verification test, revealing a systematic gap between perceived knowledge and actual understanding.

Exploratory hypotheses

1. H4 (Perception drivers among non-knowers). For consumers who cannot correctly distinguish between DOC and DOCG, which product attributes most influence their perception of value of Prosecco Superiore DOCG.

2. H5 (Channel Preferences): Preferences for communication channels differ among consumers, indicating that certain tools may be more effective than others in reinforcing awareness and appreciation of Prosecco Superiore DOCG.

4.3 Methodology

This study adopts a mixed approach that combines both quantitative and qualitative tools. The strength of this design lies in the complementarity of the two methods: while the survey provides measurable evidence of consumer awareness and attitudes, the interviews allow for a deeper interpretation of the findings. In this sense, the survey captures the “external” perspective of the market: how consumers perceive and interpret Prosecco. Whereas the interviews offer the “internal” perspective of industry actors, shifting the attention on how the identity of DOCG is constructed and communicated within the system.

The quantitative component of the research is based on a structured questionnaire administrated to consumers. Its purpose is to assess the level of awareness around the DOCG denomination, to verify whether respondents can distinguish it from the more widespread DOC, and to identify which factors most influence this perception.

In parallel, the qualitative component relies on a series of semi-structured interviews with key stakeholders in the Prosecco system, such as producers, company executives, and institutional representatives. These conversations provide an insider perspective on how Prosecco Superiore DOCG identity is communicated, helping to identify the main obstacles to its clear positioning in the market.

4.3.1 Quantitative Method: Consumer Survey

To assess the current level of awareness and understanding of Prosecco Superiore DOCG, a structured questionnaire was designed and distributed in Italian. The survey targeted a heterogeneous audience in terms of age, geographical location, and educational background, to allow meaningful comparisons across consumer segments.

The questionnaire is organized into two main sections. The first section is intended to map basic knowledge. After a short set of demographic questions, participants were asked whether they had ever heard of Prosecco and whether they were aware of the existence of the two different denominations. To verify the accuracy of this self-declared awareness, a follow-up multiple-choice question required respondents to identify the main factor distinguishing the two denominations, presenting one correct option alongside three plausible but incorrect alternatives.

The second section of the questionnaire used a five-point Likert scale (1 = not important at all, 5 = very important) to evaluate the relative importance that consumers attribute to a set of product characteristics. These included quality, production method, price, geographical origin, denomination on the label and regulatory framework. This section was designed to explore the factors that most influence perceived value and differentiation in the eyes of the consumer.

The final part of the survey consisted of two questions. The first asked respondents to indicate which communication channels they considered most effective for conveying the uniqueness of Prosecco DOCG (multiple responses allowed). The second was an open-ended question inviting participants to explain, in their own words, what they believe best defines the difference between the two denominations.

The dual structure of the survey made it possible not only to measure awareness levels, but also to gain deeper insight into how consumers interpret and prioritize the attributes associated with Prosecco.

4.3.2 Qualitative Method: Semi-Structured Interviews

To complement the survey results and provide deeper context, a series of semi-structured interviews was conducted with key actors from different areas of the Prosecco Superiore DOCG ecosystem. The sample included representatives from wineries, institutional bodies, and local government:

- Alessio Del Salvo, CEO of Mionetto S.p.A.
- Massimo Adami, Head of Production at Mionetto S.p.A.
- Diego Tomasi, Director of the Consorzio di Tutela del Prosecco Superiore DOCG.
- Laura Repossi, Social Media Manager at the Consorzio.
- Piero Geronazzo, Deputy Mayor of Valdobbiadene.

Each interview followed a two-step structure. An initial phase clarified the professional background and role of the interviewed, while the second phase developed around open-ended questions aligned with the core themes of the research. The discussions explored the current market perception of the DOCG denomination, the main challenges of communication and consumer education; and the strategic initiatives already in place, or potentially to be developed, to strengthen the positioning of Prosecco Superiore DOCG.

The interviewees were selected to represent the heterogeneity of the Prosecco Superiore DOCG ecosystem, ensuring that the main areas of the supply chain were covered. From executive management (Alessio Del Salvo) to production (Massimo Adami), from the regulatory and institutional dimension (Diego Tomasi) to digital communication and consumer engagement (Laura Repossi), and finally to the territorial and local governance perspective (Piero Geronazzo), a pool that capture all the nuances of the sector.
This diversity gives the qualitative findings a broad perspective on how the denomination's identity is shaped and communicated.

4.4 Data Preparation

The dataset obtained from the online questionnaire was exported in Excel format and subsequently imported into IBM SPSS Statistics (v. 29). During the import process, variable names were read from the first row to ensure consistency.

In a first step, variables were systematically renamed and labelled to improve clarity and facilitate readability in later analyses. For instance, declared knowledge of the DOC/DOCG distinction was coded as *Declared Knowledge*, while the outcome of the factual test was coded as *Factual Kwoledge*. The Measure property of each variable was adjusted according to its nature. In particular, the Likert-scale items were set as scale variables, age and education were defined as ordinal, while all remaining categorical variables were treated as nominal.

Following the definition of measurement levels, all variables were transformed to ensure consistency and comparability across the dataset. Binary questions (e.g., *Local vs non-Local*, *Declared Knowledge*) were recoded so that “Yes” corresponded to 1 and “No” to 0. The actual knowledge question (*Factual Knowledge*) was treated in a similar way: the single correct answer (“Zone of origin”) was coded as 1, while the three incorrect alternatives were coded as 0.

Socio-demographic variables were also standardized. *Age Categories* was grouped into three cohorts (1 = 18-30, 2 = 31-50, 3 = 50+), while *Education Level* was clustered into four ordered categories (1 = middle school, 2 = high school, 3 = bachelor’s degree, 4 = master’s degree).

Likert-scale variables (*lik_qualita*, *lik_metodo*, *lik_prezzo*, *lik_origine*, *lik_etichetta*, *lik_regolamentazione*) were kept in their original five-point format, ranging from 1 (“Not important at all”) to 5 (“Very important).

Finally, the multiple-response question regarding preferred communication channels (*canali_comunicazione*) required additional processing. Since respondents could select more than one option, each variable was recoded into separate dummy variables (e.g., *chan_social*, *chan_eventi*, *chan_label*, *chan_visit*, *chan_ambassador*, *chan_website*). Each dummy takes the value 1 if the channel was selected and 0 otherwise. This step was crucial for subsequent analyses, particularly for Hypothesis 5, which investigates how socio-demographic and knowledge-related factors influence channel preference.

4.5 Empirical Validation of the Hypotheses

Before testing the hypotheses, it is useful to provide an overview of the sample composition. This step ensures that the analyses are framed by the socio-demographic diversity of respondents and their geographical distribution.

Given the large number of statistical outputs presented in this section, all tables and figures specifically related to the empirical validation are sequentially numbered as Exhibits. This convention is adopted exclusively for Chapter 4.5, to facilitate clarity and readability.

Age Categories

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	18-30	102	72.9	72.9	72.9
	31-50	6	4.3	4.3	77.1
	50+	32	22.9	22.9	100.0
	Total	140	100.0	100.0	

Exhibit (1) – Source: Own Elaboration

With respect to age, the sample includes three cohorts: 18–30 years, 31–50 years, and 50 years and above. The distribution is clearly dominated by younger respondents (72.9%), while 22.9% belong to the 50+ group and only 4.3% fall into the 31–50 category. This composition shows that the dataset mainly reflects the views of younger individuals, while still offering some representation of older participants.

Gender

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Women	66	47.1	47.1	47.1
	Men	74	52.9	52.9	100.0
	Total	140	100.0	100.0	

Exhibit (2) – Source: Own Elaboration

Regarding gender, the sample shows a balanced distribution between women and men. As reported in the Exhibit 2, women account for 47.1% of respondents, while men make up 52.9%. This near equilibrium ensures that both perspectives are adequately represented in the analyses.

Education Level

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Middle School	7	5.0	5.0	5.0
	High School	71	50.7	50.7	55.7
	Bachelor's	33	23.6	23.6	79.3
	Master's	29	20.7	20.7	100.0
	Total	140	100.0	100.0	

Exhibit (3) – Source: Own Elaboration

In terms of education, the sample is characterized by a strong prevalence of respondents with a high school diploma, who represent 50.7% of the total. A further 23.6% hold a bachelor's degree, while 20.7% completed a master's degree. Only a small minority (5%) reported middle school as their highest level of education. Overall, the data suggest that the sample is relatively well-educated, with nearly half having pursued higher education beyond high school.

Local vs Non Local

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Non Local	81	57.9	57.9	57.9
	Local	59	42.1	42.1	100.0
	Total	140	100.0	100.0	

Exhibit (4) – Source: Own Elaboration

Finally, regarding geographical origin, 57.9% of respondents are non-local, while 42.1% come from the Valdobbiadene area or its surroundings. This balance between local and non-local participants is particularly relevant, as it provides the opportunity to investigate whether proximity to the territory translates into greater awareness of the DOC/DOCG distinction. In fact, this aspect represents the starting point for the first research hypothesis, which tests the relationship between geographical origin and factual knowledge.

4.5.1 Hypothesis 1 - Geographical Origin and Factual Knowledge

The first hypothesis investigates whether respondents' geographical origin (local vs. non-local) influences their factual knowledge of the DOC/DOCG distinction. To test this relationship, a Chi-square test of independence is applied, complemented by Fisher's Exact Test as a robustness check. This approach is appropriate since both variables are categorical, and it allows to assess whether the distribution of correct and incorrect answers differs across groups.

The expected outcome is that locals, being closer to the production area and presumably more exposed to the culture of Prosecco, will demonstrate a higher probability of factual knowledge than non-locals.

Local vs Non Local * Factual Knowledge Crosstabulation

Count

		Factual Knowledge		
		Incorrect	Correct	Total
Local vs Non Local	Non Local	36	45	81
	Local	18	41	59
Total		54	86	140

Exhibit (5) – Source: Own Elaboration

The cross-tabulation between *Local vs. Non-Local* and *Factual Knowledge* provides an initial indication of the relationship between geographical origin and the ability to correctly identify the DOCG denomination. As shown in Exhibit 5, a higher proportion of local respondents (69.5%) answered correctly compared to non-locals (55.6%).

Chi-Square Tests

	Value	df	Asymptotic Significance (2-sided)	Exact Sig. (2-sided)	Exact Sig. (1-sided)
Pearson Chi-Square	2.798[a]	1	.094		
Continuity Correction[b]	2.241	1	.134		
Likelihood Ratio	2.831	1	.092		
Fisher's Exact Test				.115	.067
Linear-by-Linear Association	2.778	1	.096		
N of Valid Cases	140				

a. 0 cells (0.0%) have expected count less than 5. The minimum expected count is 22.76.

b. Computed only for a 2x2 table

Exhibit (6) – Source: Own Elaboration

The Pearson Chi-square test did not reach conventional significance (χ^2 (1) = 2.80, p = 0.094), but the result lies inside the 10% threshold, suggesting a potential association. This trend is further supported by Fisher's Exact Test (p = 0.067, one-sided), which is particularly suitable for small samples, and strengthens the evidence that local respondents tend to perform better in recognizing the correct denomination.

Risk Estimate

	Value	95% Confidence Interval Lower	Upper
Odds Ratio for Local vs Non Local (Non Local / Local)	1.822	.899	3.694
For cohort Factual Knowledge = Incorrect	1.457	.924	2.298
For cohort Factual Knowledge = Correct	.799	.618	1.035
N of Valid Cases	140		

Exhibit (7) - Source: Own Elaboration

Exhibit 7 reports the risk estimates derived from the crosstabulation. The odds ratio for local versus non-local respondents is 1.82, indicating that locals have nearly twice the odds of providing the correct answer compared to non-locals. However, the 95% confidence interval (0.899-3.694) includes the null value, meaning that the effect is not statistically significant at the 5% level.

Overall, the analyses provide partial support for Hypothesis 1. The association between geographical origin and factual knowledge does not reach the conventional 5% significance level but is close to the 10% threshold, suggesting a weak yet meaningful trend. The cross-tabulation results (reinforced by Fisher's Exact Test) suggest that local respondents tend to demonstrate higher factual knowledge. This trend indicates that geographical proximity may positively influence awareness of the DOCG denomination, even if the evidence does not reach conventional thresholds of significance.

4.5.2 Hypothesis 2 - Demographic Effects on Factual Knowledge

The second hypothesis examines whether socio-demographic characteristics such as age and education, affect the probability of correctly distinguishing between Prosecco DOC and DOCG. Unlike Hypothesis 1, which focused solely on geographical origin, this test investigates whether individual background factors contribute to factual knowledge of the denomination.

To address this, a binary logistic regression model is applied, with *Factual Knowledge* (correct/incorrect) as the dependent variable and *Age Categories* and *Education Level* as the independent variables.

Logistic regression is particularly appropriate in this case because the dependent variable is dichotomous, and this method makes it possible to assess how each socio-demographic factor affects the chances of giving the correct answer.

The expected outcome is that respondents with higher levels of education and those in older age will be more likely to identify the correct distinction between DOC and DOCG, reflecting the role of accumulated cultural capital and long-term exposure to the denomination.

Age Categories * Factual Knowledge Crosstabulation

Count

		Factual Knowledge		
		Incorrect	Correct	Total
Age Categories	18-30	44	58	102
	31-50	1	5	6
	50+	9	23	32
Total		54	86	140

Exhibit (8) – Source: Own Elaboration

The first impression is that the distribution across age groups does not suggest a strong systematic pattern. Among younger respondents (18-30), 56.9% correctly identified the distinction, while the proportion rises for the 50+ group (71.9%). The small intermediate group (31-50) shows the highest relative share of correct answers (83.3%), but its size is too limited (n=6) to draw reliable inferences. Overall, these preliminary figures indicate that factual knowledge is present in all age categories without a consistent linear relationship between age and awareness.

Education Level * Factual Knowledge Crosstabulation

Count

		Factual Knowledge		
		Incorrect	Correct	Total
Education Level	Middle School	4	3	7
	High School	25	46	71
	Bachelor's	13	20	33
	Master's	12	17	29
Total		54	86	140

Exhibit (9) – Source: Own Elaboration

Looking at education levels, the data again do not reveal a straightforward association with factual knowledge. Respondents with only middle school education show a balanced split between correct and incorrect answers, but this group is very small (n=7). Among those with high school education, the proportion of correct responses is 64.8%, while it drops slightly to 60.6% for bachelor's degree holders and to 58.6% for those with a master's degree. This pattern suggests that higher formal education does not necessarily translate into better awareness of the DOC/DOCG distinction.

While the descriptive cross-tabulations provide some initial insights, they remain limited in their ability to capture the independent effect of age and education on factual knowledge. To test these relationships more rigorously, a binary logistic regression model was employed, with *Factual Knowledge* (correct vs. incorrect) as the dependent variable and *Age Categories* and *Education Level* as predictors.

Omnibus Tests of Model Coefficients

		Chi-square	df	Sig.
Step 1	Step	6.857	5	.231
	Block	6.857	5	.231
	Model	6.857	5	.231

Model Summary

Step	-2 Log likelihood	Cox & Snell R Square	Nagelkerke R Square
1	179.845[a]	.048	.065

a. Estimation terminated at iteration number 4 because parameter estimates changed by less than .001.

Hosmer and Lemeshow Test

Step	Chi-square	df	Sig.
1	3.604	4	.462

Exhibit (10) – Source: Own Elaboration

Exhibit 10 reports the global fit of the logistic regression model. The omnibus test ($\chi^2 = 6.857$, $p = .231$) shows that including *Age Categories* and *Education Level* does not significantly improve the prediction of factual knowledge. The pseudo-R^2 values (Cox & Snell = .048; Nagelkerke = .065) indicate that the model accounts for only about 5-6% of the variance, which is a very limited explanatory power. At the same time, the Hosmer–Lemeshow test is non-significant ($p = .462$), suggesting that the model is not mis specified, but its overall contribution remains weak.

Variables in the Equation

		B	S.E.	Wald	df	Sig.	Exp(B)	95% C.I.for EXP(B)	
								Lower	Upper
Step 1[a]	Age Categories			4.727	2	.094			
	Age Categories(1)	1.662	1.171	2.014	1	.156	5.272	.531	52.360
	Age Categories(2)	.863	.472	3.340	1	.068	2.370	.939	5.979
	Education Level			2.967	3	.397			
	Education Level(1)	1.432	.873	2.695	1	.101	4.188	.757	23.160
	Education Level(2)	1.351	.920	2.158	1	.142	3.863	.637	23.446
	Education Level(3)	1.067	.907	1.382	1	.240	2.906	.491	17.205
	Constant	-1.038	.865	1.438	1	.230	.354		

a. Variable(s) entered on step 1: Age Categories, Education Level.

Exhibit (11) – Source: Own Elaboration

Exhibit 11 presents the coefficients of the logistic regression. None of the predictors (*Age Categories* or *Education Levels*) reach conventional significance levels (all $p > .05$), confirming that neither variable has a robust effect on the likelihood of correctly identifying the DOC/DOCG distinction. The odds ratios (Exp(B)) suggest some apparent differences: older respondents (50+) show more than twice the odds compared to the youngest group, and higher education categories display values above 1, but the wide confidence intervals (often including 1) indicate strong uncertainty. Overall, the table supports the idea that factual knowledge is not systematically explained by socio-demographic characteristics such as age or education.

The statistical analyses do not support the initial hypothesis: neither age nor education emerges as a significant predictor of factual knowledge about the DOC/DOCG distinction. The logistic regression confirms that these variables explain only a marginal share of the variance, and no robust effect is detected.

This finding is still meaningful: it indicates that the lack of knowledge is a transversal phenomenon, affecting respondents regardless of educational background or age group.

4.5.3 Hypothesis 3 - Over-Claiming Knowledge

The third hypothesis examines the gap between perceived and actual knowledge of the DOC/DOCG distinction, asking whether respondents who claim to know the difference are in fact able to identify it correctly. To test this, are compared the respondents declared knowledge (binary: yes/no) with their performance on the factual verification question (binary: correct/incorrect). A cross-tabulation is used to highlight discrepancies, followed by a Chi-square and Fisher's exact test to check the strength of association between self-reported and actual knowledge.

The expectation is that a significant proportion of respondents who declare familiarity with the distinction will nevertheless fail to answer the factual test correctly. This would confirm the existence of an "over-claiming" effect, in which self-perception overestimates real knowledge.

Declared Knowledge * Factual Knowledge Crosstabulation

			Factual Knowledge		
			Incorrect	Correct	Total
Declared Knowledge	NO	Count	11	9	20
		% within Declared Knowledge	55.0%	45.0%	100.0%
	YES	Count	43	77	120
		% within Declared Knowledge	35.8%	64.2%	100.0%
Total		Count	54	86	140
		% within Declared Knowledge	38.6%	61.4%	100.0%

Exhibit (12) – Source: Own Elaboration

The cross-tabulation between *Declared Knowledge* and *Factual Knowledge* uncovers an important misalignment. Among respondents who admitted not knowing the distinction, almost half (45%) surprisingly gave the correct factual answer, while more than one-third (35.8%) of those who claimed to know indeed failed the test. This suggests that self-assessment is unreliable: some individuals underestimate their competence, whereas others display misplaced confidence.

Chi-Square Tests

	Value	df	Asymptotic Significance (2-sided)	Exact Sig. (2-sided)	Exact Sig. (1-sided)
Pearson Chi-Square	2.658[a]	1	.103		
Continuity Correction[b]	1.911	1	.167		
Likelihood Ratio	2.588	1	.108		
Fisher's Exact Test				.137	.085
Linear-by-Linear Association	2.639	1	.104		
N of Valid Cases	140				

a. 0 cells (0.0%) have expected count less than 5. The minimum expected count is 7.71.

b. Computed only for a 2x2 table

Exhibit (13) – Source: Own Elaboration

From a statistical standpoint, the association between declared and factual knowledge is weak. The Chi-square test ($\chi^2 = 2.658$, $p = .103$) did not reach conventional significance, although the result is close to the 10% threshold, indicating at least a potential trend. Similarly, Fisher's exact test ($p = .085$, one-sided) reinforces the idea of a weak but suggestive association.

Risk Estimate

	Value	95% Confidence Interval Lower	Upper
Odds Ratio for Declared Knowledge (NO / YES)	2.189	.841	5.697
For cohort Factual Knowledge = Incorrect	1.535	.966	2.439
For cohort Factual Knowledge = Correct	.701	.424	1.159
N of Valid Cases	140		

Exhibit (14) – Source: Own Elaboration

The risk estimate provides additional nuance. The odds ratio (OR = 2.19) indicates that respondents who declare to know the difference have about twice the odds of answering correctly compared to those who openly admit ignorance. However, the 95% confidence interval (0.84-5.69) includes the value of 1, meaning that the effect cannot be considered statistically significant. In other words, while the descriptive evidence points to a gap between perception and reality, the inferential results prevent from drawing definitive conclusions.

Overall, Hypothesis 3 is not fully supported: declared knowledge does not reliably predict factual accuracy. The statistical tests remain below the 5% threshold, though they approach the 10% level, confirming that self-assessment is not a trustworthy indicator of actual competence. Yet the descriptive evidence is highly revealing, more than one-third (35.8%) of respondents who claim to know the DOC/DOCG distinction fail the factual test, signaling a case of over-claiming.

4.5.4 Hypothesis 4 - Drivers among Non-Knowers

The fourth hypothesis shifts the focus from those who claim to know the DOC/DOCG distinction to those who do not. Even when consumers lack factual knowledge, their perceptions of Prosecco may still be influenced by different product attributes. Since non-knowers represent the largest share of the market, understanding their perspective is particularly relevant: attributes such as quality, production method, origin, price, or regulatory guarantees can still shape how this group evaluates the denomination. It becomes strategical identifying which attributes matter most for them and thus offer the strongest levers for future communication and positioning activities.

To test this, the analysis isolates the subgroup of respondents who failed the factual knowledge question. Within this group, the Likert-scale evaluations (1–5) of the main product attributes are examined. Pearson correlation coefficients are used to explore the associations among these attributes, allowing to detect which factors tend to cluster together in shaping perceptions of DOCG among uninformed consumers.

Correlations

		lik_qualita	lik_metodo	lik_prezzo	lik_origine	lik_etichetta	lik_regolamentazione
lik_qualita	Pearson Correlation	1	.433**	.139	.174	.228	.411**
	Sig. (2-tailed)		.001	.325	.217	.104	.002
	N	52	52	52	52	52	52
lik_metodo	Pearson Correlation	.433**	1	.256	.266	.268	.363**
	Sig. (2-tailed)	.001		.067	.056	.054	.008
	N	52	52	52	52	52	52
lik_prezzo	Pearson Correlation	.139	.256	1	.294*	.126	.194
	Sig. (2-tailed)	.325	.067		.034	.375	.168
	N	52	52	52	52	52	52
lik_origine	Pearson Correlation	.174	.266	.294*	1	.330*	.466**
	Sig. (2-tailed)	.217	.056	.034		.017	<.001
	N	52	52	52	52	52	52
lik_etichetta	Pearson Correlation	.228	.268	.126	.330*	1	.339*
	Sig. (2-tailed)	.104	.054	.375	.017		.014
	N	52	52	52	52	52	52
lik_regolamentazione	Pearson Correlation	.411**	.363**	.194	.466**	.339*	1
	Sig. (2-tailed)	.002	.008	.168	<.001	.014	
	N	52	52	52	52	52	52

**. Correlation is significant at the 0.01 level (2-tailed).

*. Correlation is significant at the 0.05 level (2-tailed).

Exhibit (15) – Source: Own Elaboration

The correlation matrix was generated using Pearson's correlation across six product attributes (quality, production method, price, origin, label, and regulatory guarantees), considering only the subgroup of respondents who did not correctly identify the DOC/DOCG distinction ($N = 52$). The analysis enables to explore which drivers are intuitively associated in the minds of uninformed consumers. Correlation coefficients are interpreted in terms of both strength and statistical significance, with p-values below .05 and .01 indicating meaningful associations.

One of the clearest results is the strong and highly significant correlation between quality and production method ($r = .433$, $p = .001$). This indicates that respondents tend to perceive the production process and the resulting quality as closely connected, even without a technical understanding of the denomination. In other words, these attributes form an intuitive cluster where method is taken as a direct signal of product quality.
Another important pattern concerns regulatory guarantees, which show the broadest set of significant associations across the matrix. Specifically, regulation correlates with quality ($r = .411$, $p = .002$), production method ($r = .363$, $p = .008$), origin ($r = .466$, $p < .001$), and even label ($r = .339$, $p = .014$). This suggests that, for uninformed consumers, regulation acts as a key reference point for building trust, while simultaneously adding greater credibility to the other product attributes. Respondents intuitively link the existence of formal guarantees with higher product standards, consistent processes, authentic origin, and reliable communication through labeling.

In contrast, price emerges as a relatively isolated attribute. Its only significant association is with origin ($r = .294$, $p = .034$), indicating that respondents who pay attention to provenance are also somewhat more sensitive to price. However, price does not correlate strongly with perceived quality or with regulation, highlighting that non-knowers do not treat it as a primary driver of value.

A final insight emerges around the role of labels. Although often underestimated, the label variable shows meaningful correlations with origin ($r = .330$, $p = .017$) and regulation ($r = .339$, $p = .014$). This suggests that, for less informed consumers, labels are not seen as independent drivers but as tools that provide reassurance about origin and compliance. In other words, the label works as a communication bridge: its effectiveness depends on its ability to signal authenticity and regulation, rather than on design or aesthetics alone.

The correlation analysis reveals two distinct clusters in the way uninformed consumers interpret Prosecco. The first is a qualitative cluster, where quality and production method are strongly associated, respondents tend to view the method not just as a technical detail but as the foundation of perceived quality. The second is an institutional cluster, in which regulation, origin, and labels converge to form a framework of trust and authenticity. For these consumers, guarantees of control, territorial provenance, and labeling cues all reinforce one another, creating a sense of credibility that compensates the absence of detailed factual knowledge.

Within this structure, price remains marginal, exerting little influence compared to other factors. By contrast, production method, highlights a point of contact between the two clusters. The assurance of quality provided by the method is itself reinforced by regulation, which frames and certifies the production process.

Overall, the analysis shows that consumer perceptions gravitate around two main anchors: the link between quality and production method, and the reassurance provided by regulation, origin, and labels.

4.5.5 Hypothesis 5 - Channel Preferences

The fifth hypothesis investigates whether preferences for communication channels vary across consumer groups, and how effective these channels are in conveying the identity of Prosecco Superiore DOCG. While the survey allowed respondents to select multiple options, an initial screening of the data reveals that not all channels hold the same weight in terms of frequency or relevance.

To ensure transparency, all channels were considered at first. The frequency analysis, however, highlighted labels and winery visits as the two most selected options. These will therefore be the focus of the detailed analysis on communication effectiveness.

Before turning to the statistical validation, exhibit 16 reports the descriptive statistics of all available channels (total selections, percentages, mean and standard deviation). This provides a comprehensive overview and clarifies why the focus is placed on labels and winery visits.

	N	*Count*	*Percent*	*Mean*	*Std. Dev.*
Label	140	95	67.9%	0.68	0.468
Visit	140	59	42.1%	0.42	0.495
Social Campaign	140	56	40.0%	0.40	0.491
Website/QR	140	50	35.7%	0.36	0.480
Ambassador	140	27	19.3%	0.19	0.395

Exhibit (16) - Source: Own Elaboration

Labels emerge as the most frequently selected option (95 cases, 67.9%), followed by winery visits (59 cases, 42.1%) and social campaigns (56 cases, 40.0%). Website/QR codes account for 35.7% of the responses, while ambassadors appear to be the least selected channel, with only 19.3% of participants considering them relevant.

Based on these results, the subsequent analysis will focus primarily on labels and winery visits, as they represent the two channels with the highest frequencies.

As a first step, exhibit 17 examines the relationship between *Factual Knowledge* and the preference for product labels as a communication channel (*Label*).

Factual Knowledge * Label

Crosstab

			Label		
			Not Selected	Selected	Total
Factual Knowledge	Incorrect	Count	22	32	54
		% within Label	48.9%	33.7%	38.6%
	Correct	Count	23	63	86
		% within Label	51.1%	66.3%	61.4%
Total		Count	45	95	140
		% within Label	100.0%	100.0%	100.0%

Exhibit (17) – Source: Own Elaboration

Exhibit 17 compares factual knowledge of the DOC/DOCG distinction with the preference for product labels as a communication channel. The first visual impact is that the crosstab highlights that those who selected the label option are more frequently among the respondents who answered correctly (66.3%) compared to those who did not select it (51.1%).

This gap suggests that consumers with a stronger factual understanding tend to attribute greater importance to labels as a reliable source of information. Such evidence reinforces the interpretation of labels as a central lever for communicating the identity of Prosecco Superiore DOCG, since they are consistently valued across different knowledge levels.

Chi-Square Tests

	Value	df	Asymptotic Significance (2-sided)	Exact Sig. (2-sided)	Exact Sig. (1-sided)
Pearson Chi-Square	2.979[a]	1	.084		
Continuity Correction[b]	2.372	1	.124		
Likelihood Ratio	2.946	1	.086		
Fisher's Exact Test				.097	.062
Linear-by-Linear Association	2.958	1	.085		
N of Valid Cases	140				

a. 0 cells (0.0%) have expected count less than 5. The minimum expected count is 17.36.

b. Computed only for a 2x2 table

Exhibit (18) – Source: Own Elaboration

The Chi-square test ($\chi^2 = 2.979$, $p = .084$) does not reach the conventional significance threshold ($p < .05$), but it reaches the 10% level, suggesting a weak trend worth noting. This interpretation is reinforced by the linear-by-linear association ($p = .085$).

Risk Estimate

	Value	95% Confidence Interval Lower	Upper
Odds Ratio for Factual Knowledge (Incorrect / Correct)	1.883	.914	3.880
For cohort Label = Not Selected	1.523	.947	2.450
For cohort Label = Selected	.809	.627	1.044
N of Valid Cases	140		

Exhibit (19) – Source: Own Elaboration

The risk estimate further indicates that respondents who selected the label are less likely to provide an incorrect answer (OR = 0.81), while those who did not select it have higher odds of error (OR = 1.52).

However, the wide confidence intervals, which cross the neutral value of 1, confirm that the effect cannot be considered statistically robust.

Despite these limitations, the pattern that emerges is clear: labels appear to be more frequently associated with individuals who demonstrate factual knowledge. While the relationship is not statistically significant at the strictest thresholds, the tendency suggests that product labeling could act as a channel particularly relevant for those who already possess or are closer to acquiring an accurate understanding of Prosecco Superiore DOCG.

A supplementary logistic regression including *Age Categories*, *Education Level*, and *Local vs Non-Local* alongside *Factual Knowledge* suggests that the weak association observed in the crosstab analysis does not gain further statistical strength once additional variables are introduced. This indicates that factual knowledge may play a role in shaping label preferences, but the effect remains fragile and is not reinforced by socio-demographic differences.

After examining the role of labeling as a communication channel, attention now turns to winery visits.

Factual Knowledge * Visit

Crosstab

			Visit		
			Not Selected	Selected	Total
Factual Knowledge	Incorrect	Count	32	22	54
		% within Visit	39.5%	37.3%	38.6%
	Correct	Count	49	37	86
		% within Visit	60.5%	62.7%	61.4%
Total		Count	81	59	140
		% within Visit	100.0%	100.0%	100.0%

Exhibit (20) – Source: Own Elaboration

Exhibit 20 shows the relationship between winery visits (*Visit*) and *Factual Knowledge*. The crosstab reveals nearly identical distributions: among those who did not select visits, 39.5% answered incorrectly and 60.5% correctly, while among those who did select visits the proportions were 37.3% and 62.7%. The differences are marginal and clearly not systematic.

Chi-Square Tests

	Value	df	Asymptotic Significance (2-sided)	Exact Sig. (2-sided)	Exact Sig. (1-sided)
Pearson Chi-Square	.071[a]	1	.790		
Continuity Correction[b]	.008	1	.928		
Likelihood Ratio	.071	1	.790		
Fisher's Exact Test				.861	.465
Linear-by-Linear Association	.070	1	.791		
N of Valid Cases	140				

a. 0 cells (0.0%) have expected count less than 5. The minimum expected count is 22.76.

b. Computed only for a 2x2 table

Risk Estimate

	Value	95% Confidence Interval	
		Lower	Upper
Odds Ratio for Factual Knowledge (Incorrect / Correct)	1.098	.551	2.191
For cohort Visit = Not Selected	1.040	.780	1.386
For cohort Visit = Selected	.947	.633	1.417
N of Valid Cases	140		

Exhibit (21) – Source: Own Elaboration

Statistical tests confirm this impression. The Chi-square test ($\chi^2 = 0.071$, $p = .790$) and Fisher's Exact test ($p = .861$) indicate no significant association, while the odds ratio (OR = 1.10, 95% CI [.55–2.19]) further suggests that selecting visits does not meaningfully change the likelihood of answering correctly.

Taken together, these results indicate that the preference for winery visits is independent of respondents' actual knowledge of the DOC/DOCG distinction. The inclusion of this variable remains relevant, however, because visits are the second most frequently selected channel overall (see Exhibit 16).

In sum, the analysis of channel preferences highlights two main insights. First, labels emerge as the most frequently selected option, and they show a weak but noteworthy trend of being associated with higher factual knowledge. Second, winery visits, while not statistically correlated with factual knowledge, remain a highly valued channel in absolute terms.

Together, these findings suggest that the most effective communication strategy for Prosecco Superiore DOCG should combine clearer and more distinctive labeling with immersive experiential initiatives, ensuring both cognitive clarity and emotional resonance.

4.5.6 Discussion of Results

Following the statistical analysis presented in the previous sections, the main results can be synthesized and discussed as follows. This section synthesizes the empirical evidence into a set of key insights that provide a basis for the subsequent discussion.

First, the evidence suggests that proximity matters but is not decisive: local respondents tend to perform better on the factual test than non-locals, although results rest around the 10% significance level. This points to a weak but meaningful territorial effect rather than a structural divide.

Second, socio-demographic traits do not systematically explain awareness. Neither age nor education emerges as a significant predictor of factual knowledge, indicating that the knowledge gap cuts across groups and should be addressed by content design rather than specific audience targeting.

Third, the study documents an over-claiming pattern: more than one third of those who declare they know the DOC/DOCG difference fail the factual verification, while many “non-experts” answer correctly. This misalignment cautions against relying on self-reported familiarity and underscores the need for clear, verifiable cues.

Fourth, the analysis of non-knowers reveals two stable cognitive clusters. A qualitative cluster links quality to production method, suggesting that method operates as an intuitive proxy for quality. An institutional cluster binds regulatory guarantees, origin, and labels, forming a trust framework that compensates for limited technical knowledge. Notably, price is peripheral within this structure.

Fifth, channel preferences indicate that labels are the most frequently selected tool, while winery visits are highly valued but not associated with higher factual knowledge. Together, these findings recommend a dual approach: strengthen label clarity to deliver cognitive signals of authenticity and regulation; and complement it with immersive experiences that build emotional resonance and narrative depth.

While the preceding section has outlined the main empirical findings across the five tested hypotheses, it is important to keep in mind that the entire study rests on the characteristics of the selected sample. Limitations and scope conditions must therefore be acknowledged. The sample skews young (18–30) and several tests yield p-values around 0.08–0.10, which supports prudent interpretation and invites replication with larger, more balanced samples. Nonetheless, the converging patterns are consistent and actionable for communication design.

Overall, the evidence confirms that the identity of Prosecco Superiore DOCG is shaped by both intrinsic and extrinsic dimensions. Among the former, Hypothesis 4 is particularly telling: non-expert consumers tend to associate product quality directly with production method, while others rely on institutional markers such as origin and labels. This duality highlights how the product itself, its tangible features and production practices, remains central in consumer perception, even when knowledge is incomplete. At the same time, extrinsic factors, such as communication channels (labels) and experiential touchpoints (winery visits), play a complementary role in reinforcing trust and distinctiveness.

These findings suggest that any strategy aimed at strengthening the positioning of Prosecco Superiore DOCG must consider the interplay between intrinsic and extrinsic dimensions, with the product at the core and communication as an amplifier of its values.

5. Conclusions

The final chapter presents the conclusions of this research, organized in a problem-solution format. To ensure clarity, the discussion is divided into two complementary dimensions: the intrinsic dimension, which relates directly to the product and its defining characteristics, and the extrinsic dimension, which refers to the broader context in which the product is perceived, communicated, and positioned in the market. Each dimension is addressed by first outlining the key problems that emerged from the analysis and interviews, and then proposing possible solutions aimed at strengthening the competitive positioning of Prosecco Superiore DOCG.

The first part focuses on the intrinsic dimension, namely the set of defining elements that shape the product and its identity: production methods, regulatory parameters, geographic delimitation, and denomination. These elements define the very identity of Prosecco Superiore DOCG, linking technical features to perceived authenticity and quality. Any strategy aimed at reinforcing distinctiveness must therefore begin with these foundations, as strengthening them is essential to ensure that the DOCG stands out more clearly.

A first critical issue lies in the limited distinction between Prosecco DOC and DOCG at the sensorial level. As highlighted during the interview with Massimo Adami, for an average consumer, unless trained as a sommelier or possessing a refined palate, the tasting experience does not easily reveal clear differences between the two denominations. This difficulty is consistent with the results of Hypothesis 4, which indicate that non-knowers, representing the largest and most promising market segment, tend to associate quality directly with the production method. In other words, it is precisely the method that constitutes the basis for perceiving distinctiveness, and when this dimension is not sufficiently emphasized, the product risks being confused with the DOC.
A possible response requires the intervention of the Consorzio through regulatory adjustments. Since the Charmat-Martinotti method represents a cultural cornerstone of Prosecco production and it cannot therefore be altered, the regulatory framework could be modified and be more flexible, allowing greater sensorial differentiation. In this sense, potential measures could regard higher minimum alcohol levels, tighter parameters on acidity, or the experimentation of new aromatic profiles. At the same time, the DOCG enjoys a unique territorial configuration, marked by steep hillsides, distinctive microclimates, and the recognition of subzones such as the Rive and Cartizze, that already provides a natural basis for this differentiation.

Such refinements would not compromise the identity of Prosecco but could add tangible elements that make the aromatic distinction between DOC and DOCG more evident, even to non-expert consumers. Previous oenological studies have also underlined that the high degree of similarity between wines produced under the two denominations, points to the need for clearer differentiation at the regulatory level (Gaiotti et al., 2018).

A second challenge concerns the denomination itself. Once a product acquires a unique identity, it is essential that this identity can be commercialized effectively, starting with a name that is memorable and easy to distinguish. Marketing research have emphasized that simplicity and clarity are fundamental for consumer recall, particularly in international markets (Keller, 2013).

In this respect, Conegliano Valdobbiadene Prosecco Superiore DOCG presents two critical issues. First, the denomination risks creating redundancy and confusion with Prosecco DOC, simply because the formulation of the name does not provide a sufficiently distinctive element to mark a clear separation between the two categories in the consumer's perception. As Diego Tomasi emphasized in the interview, the decision taken in 2009, when the distinction between DOC and DOCG was formally recognized, proved to be a strategic mistake: by opting for such a similar name, the DOCG exposed itself to the risk of overlap and weak distinctiveness. Second, the full official name: Conegliano Valdobbiadene Prosecco Superiore DOCG, is excessively long and not easily accessible to international audiences. Since about 80% of Prosecco is sold abroad, this linguistic complexity creates a double barrier: non-Italian consumers often find it hard to pronounce correctly and equally hard to remember, which limits brand memorability and weakens the DOCG's ability to stand out clearly in foreign markets.

The bridge from Hypothesis 4 reappears here: the hypothesis showed that many non-knowers rely heavily on labels as signals of authenticity, origin, and regulatory guarantees. Labels therefore play a pivotal role in shaping consumer trust, and any change in denomination should be considered together with how it is presented on the label. Since the Consorzio is the authority for both regulation and naming, it would be the entity responsible for initiating any revision. A more compact and distinctive denomination, especially in its front-label version, could improve memorability and reduce confusion with the DOC. Recent research confirms this point: wines with names perceived as unclear or misleading tend to underperform in export markets, while clearer and more distinctive denominations enjoy a measurable premium (Caloffi et al., 2025). This reinforces the idea that by simplifying and differentiating its name, DOCG could strengthen its position abroad.

Now that the intrinsic dimension of Prosecco Superiore DOCG has been explored, attention will shift towards the extrinsic factors that influence the positioning and the competitiveness. While intrinsic features define the product itself, extrinsic dynamics are about the larger environment in which the denomination operates, either within the sector or in external markets.

Within the sector, two major challenges emerge. The first is the structural fragmentation of the production system, as highlighted in the SWOT analysis: a multitude of heterogeneous players compete without a unified strategic direction, which weakens the collective strength of the denomination. The second is a form of double pressure that undermines the DOCG's ability to consolidate its identity: on the lower side, Prosecco DOC exerts a cannibalizing effect, benefiting from its scale and widespread accessibility, which tend to overshadow the more specific identity of the DOCG. On the upper side, direct competitors from other sparkling wine denominations are often supported by stronger branding and more defined market positioning, limiting the space for DOCG to emerge as a distinctive category.

Structuring the solutions for these challenges requires a twofold approach. The priority is to build a clear identity for Prosecco Superiore DOCG and to stabilize its market position. By securing a defined space, the denomination can overcome the double pressure it faces and assert itself more firmly against both Prosecco DOC and established sparkling wine competitors. The consolidation of identity, based on the intrinsic elements discussed earlier, therefore becomes the foundation for a stronger competitive positioning.

Once the spot is secured, attention must shift to the problem of fragmentation. The presence of many small and medium-sized producers, each following their own strategy, limits the denomination's overall strength and reduces its visibility in international markets. To solve this, a coordinated strategy led by the Consorzio is essential. Such coordination would bring producers together under a common vision, reduce internal division, and present a more unified image. In this way, identity-building and stabilization respond to the issue of double pressure, while a shared strategy provides the means to overcome fragmentation.

After that identity and positioning have been consolidated, the natural question becomes: in which direction should the denomination move? The answer requires a step back. As highlighted in Section 2.1.3, international markets are highly differentiated: while mature destinations are showing signs of saturation, others still offer considerable growth potential. This perspective was reinforced during the interview with Alessio De Salvo, who noted that Prosecco is experiencing strong international growth. For the DOCG, however, success abroad cannot rely on the same level of market penetration

as the DOC. Its expansion strategy must therefore be carefully targeted, designed to capture the right opportunities and to increase the DOCG's visibility on the international stage.
How to approach these markets is therefore the next question. As shown by the results of Hypothesis 5, the label plays a decisive role, especially for non-knowers who represent the typical consumers in less mature markets. For these individuals, the label is not just a visual element but a trusted signal of authenticity and quality. In such context, its role extends beyond simple identification: it becomes the entry point through which consumers develop their first perceptions of the denomination. A label that transmits clarity and reassurance is an essential market entry point, yet it must be supported by additional efforts to further communicate the values and cultural identity behind the product.

In this sense, a key challenge for Prosecco Superiore DOCG is to communicate the deeper set of values that sustain the denomination. As highlighted in Chapters 2 and 3, the DOCG has often struggled to make these values visible to consumers, even though they represent one of its strongest assets. The UNESCO recognition of the hills, the uniqueness of the local microclimates, and the distinctive agricultural practices all contribute to a heritage that goes beyond the product itself. However, these elements must be clearly communicated to reinforce the identity of the denomination. Hypothesis 2 provides an important indication in this respect: the appreciation of such values is not significantly influenced by variables such as age or education level. This means that the DOCG must be able to convey its cultural and territorial dimension to a broad and diverse audience, reaching consumers in a transversal way.
In such context, two channels emerge as particularly relevant. The first is the one of winery visits, highlighted by Hypothesis 5 as the second most effective means of communication. This result is consistent with what emerged in Chapter 2, where several wineries, such as Mionetto and Bortolomiol, have started investing in facilities and initiatives aimed at offering immersive customer experiences, which connects to the discussion in Chapter 3 about the strategic role of customer experience in shaping brand perception.
The importance of these ongoing projects was a central argument in the interview with Piero Geronazzo, deputy mayor of Valdobbiadene, who confirmed that wine tourism in the area is currently in great expansion. In response to that, larger wineries are developing their own tasting rooms and structured programs, concurrently smaller producers are starting to rely on partnerships with local B&Bs to offer visitors a real Eno touristic experience. In both cases, winery visits allow consumers to taste the product and to acquire awareness about the cultural and territorial heritage behind it, representing a way to leverage also on the potential for word-of-mouth once visitors return home.

While valuable, this channel on its own is unlikely to provide a sufficient contribution to address all challenges or to drive substantial international expansion of the DOCG.
This leads to a second tool: the role of ambassadors. Although this option received fewer selections in the survey, the Consorzio is already experimenting it as noted during the interview with Diego Tomasi. The current initiative, called the "Young Club," involves 69 young people between the ages of 25 and 35, mainly from the local area, who receive training on sustainability, promotion, and the production regulations. However, the program remains informal and does not provide an official certification. To maximize its potential, the program would need to be formalized into a structured course offering comprehensive preparation, not only on technical aspects such as sustainability and regulations, but also on narrative skills. Ambassadors should be trained to use storytelling as means to transmit the heritage and identity of Prosecco Superiore DOCG and then be sent abroad to represent the denomination in a way that is both informative and engaging.
In this way, winery visits and ambassador programs would complement each other: in the former, consumers come to the territory and experience its values directly; in the latter, the territory goes to the consumers, carrying its culture and distinctiveness beyond local borders.

In summary, the analysis has highlighted two intrinsic challenges: limited sensorial differentiation from Prosecco DOC and the excessive complexity of the denomination's name. And three extrinsic ones: internal fragmentation combined with double pressure from DOC and other competitors, the contrast between saturated and emerging markets, and the difficulty of transmitting cultural values effectively. Together, they highlight the central task ahead: to consolidate the uniqueness of the product and to ensure that this identity is communicated consistently and convincingly.
Although, addressing this task requires a collective effort. Wineries of all sizes and local institutions, must act as part of a coordinated system in which the Consorzio plays the central role of guidance and alignment. Only through a shared vision and joint responsibility Prosecco DOCG can build the consistency and coherence needed to reinforce and expand its identity.
Most important, it must be recognized that this is a gradual process. The strengthening of the denomination cannot be achieved through rapid changes, but through the careful accumulation of value over time. In line with the logic of slow branding, progress will depend on deliberate, targeted actions and on the ability to seize the right opportunities at the right moment, ensuring lasting recognition and credibility in global markets.

5.1 Research Contribution

The existing studies on Prosecco sector have covered mainly its global expansion and commercial success, often treating the DOC and DOCG as one category. Within this approach, Conegliano Valdobbiadene Prosecco Superiore DOCG has rarely been investigated systematically. Limited attention has been dedicated not only to its weak distinction from Prosecco DOC, but also to issues such as the complexity of the denomination, the fragmentation of the production system, the competitive pressures it faces, and the difficulties in transmitting its cultural and territorial values.
This research goes beyond the aggregate view and examines the DOCG as a distinct case, combining empirical evidence and strategic theories to explore the specific factors that influence its recognition and competitiveness.

The first major contribution of this work is empirical. It derives from the quantitative survey, which measured factual knowledge of the DOC/DOCG distinction, perceived drivers of quality, and preferences for communication channels in the case of Prosecco Superiore DOCG. This design produces three key findings: many consumers show limited or confused knowledge of the difference between DOC and DOCG; the label emerges as the main practical vehicle of recognition and trust; and perceptions of quality are often linked directly to the production method. These results add specific evidence to a field where prior studies had mostly considered Prosecco in aggregate.
The qualitative interviews serve mainly to contextualize and reinforce these findings. They confirm the strategic impact of consumer confusion and highlight sector issues such as fragmentation and competitive pressure. They also point to initiatives already under way, like wine tourism and ambassador programs, which align with the survey results on effective communication channels. In this way, the qualitative evidence strengthens the survey insights and provides a consistent DOCG-level perspective.
Overall, this combination of survey and interviews delivers a clearer picture of Prosecco Superiore DOCG as a distinct denomination, offering evidence that had previously been missing in the literature.

Beyond the empirical evidence, this work also makes an analytical contribution. Research on Prosecco has usually concentrated on market growth or production trends, without framing the DOCG within broader theories of branding and communication.
A first element is the role of geographical indications. The results confirm that for many consumers the DOCG label does more than certify legal compliance: it functions as a visible guarantee of authenticity and origin, shaping perceptions of quality. Second, the importance of storytelling as a tool to transmit cultural and territorial values, such as heritage, landscape, and savoir-faire, that cannot be captured by technical specifications alone. Third, it interprets the long-term process of building DOCG distinctiveness through the concept of slow branding, underlining that recognition must be cultivated gradually through coherent and deliberate actions.
In this way, empirical data have been integrated with theoretical frameworks that are not frequently been applied to Prosecco Superiore DOCG, specifying how authenticity, storytelling, and gradual brand building contribute to its identity.

A further contribution lies at the strategic level. Previous research on Prosecco and on geographical indications has often stopped at describing existing difficulties, without developing structured frameworks to address them. Building on the evidence collected, this study proposes a model that distinguishes between intrinsic factors, such as product features, denomination design, and regulatory parameters, and extrinsic ones, like market dynamics, communication channels, and consumer experiences; and comments how these factors combined can represent the solution.
Rather than offering a fragmented view, this framework clarifies how the different elements interact and where coordinated action is most needed. It suggests that the effectiveness of any solution depends on alignment across actors, with wineries and institutions working under the leadership of the Consorzio. In this sense, what emerges is not only a diagnosis of challenges but also a practical guide for both future research and managerial strategies aimed at strengthening the global position of Prosecco Superiore DOCG.

In conclusion, the three contributions complement each other: the empirical evidence exposes the specific challenges of the DOCG, the conceptual framing connects them to wider theories of authenticity and branding, and the strategic model translates them into a coherent path for action. Together, they provide understanding of how the denomination can preserve its heritage while competing more effectively in global markets.

5.2 Limitations and Future Directions

This research project is shaped by specific boundaries that must be acknowledged when interpreting results. The survey relied on a predominantly young sample, which limits the ability to generalize across different age groups; although Hypothesis 2 suggested that age does not significantly affect knowledge, the high p-value obtained (0.231) indicates that the result is not fully reliable and therefore calls for verification through a broader and more heterogeneous distribution of respondents. The limited size and composition of the sample also reduced the robustness of the statistical analyses: while the tests provided useful directional evidence, the reduced number of observations constrained their explanatory power and prevented more advanced methods from yielding valid inferences. This issue is particularly relevant for questions designed to capture nuanced differences in consumer perceptions, where a larger sample would allow sharper distinctions to emerge and increase the significance of the results ($p < 0.05$).
Moreover, the sample was largely domestic, with a predominance of respondents from Veneto, while about 80% of Prosecco is exported. At the national level, it will be crucial to extend the survey beyond Veneto, reaching regions less exposed to Prosecco and with limited awareness of what DOCG itself represents, thereby reducing the bias of geographical proximity and ensuring a more accurate view of consumer awareness. At the international level, broadening the scope to mature markets (United States, United Kingdom, France and Germany), as well as to high-potential and emerging ones, is essential not only to capture cross-country variations in awareness of the DOC/DOCG distinction but also because these areas represent the strategic direction on which Prosecco should increasingly focus, as highlighted in the conclusions. It is reasonable to expect that such a wider audience would reinforce even more clearly the preliminary indications that emerged from this research, confirming their validity and providing stronger ground for future strategic choices. Nevertheless, the consistent patterns observed across questions suggest that these findings already capture meaningful tendencies, which further research could validate more firmly through larger and more balanced samples.

Beyond these aspects, future studies could also incorporate additional variables. Price, for instance, was studied through analyses of export data and strategic clusters, yet the consumer side of the equation remains less explored. A promising direction would be to examine willingness to pay: the extent to which consumers are ready to invest in higher quality or stronger distinctiveness. Such research would provide a more nuanced understanding of the economic value attributed to Prosecco Superiore DOCG in comparison with other sparkling wines. A second area concerns sustainability. Environmental and social practices are increasingly central to consumer choices and to the reputation of wine denominations, yet their specific impact on the DOCG segment remains unclear. Finally, digital storytelling is emerging as a valuable tool to spread cultural and territorial values among international audiences, by understanding how it can be used more effectively comparing to more traditional communication channels, it could provide precious insights for both the denomination and practitioners.

Another promising direction for future research concerns the methodology applied. So far, most studies, including this one, have been cross-sectional, able to capture consumer attitudes in a single point in time. However, the identity of a denomination develops gradually accordingly to the evolving market conditions. Longitudinal research could provide a more dynamic view by tracking how consumers perceptions of authenticity, distinctiveness, and value transmission change over time, concurrently with the evolution of the Prosecco market. Such approach is well aligned with the concept of slow branding, which emphasizes that brand recognition is built step by step, through consistent strategies and the gradual accumulation of value over the long term.

These boundaries do not diminish the validity of the findings but underscore the need for further research that can test, extend, and complement the insights provided here.

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Appendix - Survey

Section 1

1. Do you live in the municipality of Valdobbiadene or in the surrounding area (within 15 km)?
   - YES
   - NO

2. What is your age group?
   - 18-30 Years
   - 30-50 Years
   - 50 Years or older

3. What is your gender?
   - Male
   - Female

4. What is the highest level of education you have completed?
   - Middle School
   - High School Diploma
   - Bachelor's Degree
   - Master's Degree

5. Have you ever heard of Prosecco?
   - YES
   - NO

6. Do you know that there are two different denominations: Prosecco DOC and Prosecco DOCG?
    - YES
    - NO

7. In your opinion, which of the following factors best explains the difference between DOC and DOCG?
    - Production method
    - Type of grape used
    - Bottle type or label
    - Geographical area of origin
    - Average selling price

Section 2

How important do you consider each of the following elements in distinguishing between Prosecco DOC and DOCG?

8. How important do you consider the quality of the product?
    - 1
    - 2
    - 3
    - 4
    - 5

9. How important do you consider the production method?
    - 1
    - 2
    - 3
    - 4
    - 5

10. How important do you consider the price of the product?

- 1
- 2
- 3
- 4
- 5

11. How important do you consider the name shown on the label?

- 1
- 2
- 3
- 4
- 5

12. How important do you consider the production area/territory?

- 1
- 2
- 3
- 4
- 5

13. How important do you consider the legislative regulation that governs the denomination?

- 1
- 2
- 3
- 4
- 5

14. Which means do you consider most effective for communicating the value of Prosecco DOCG? (Multiple answers allowed)
    - Product label
    - Social media campaigns
    - Winery visits
    - Local ambassadors
    - Official website or QR code on the back label

15. In brief, in your own words, how would you describe the main difference between Prosecco DOC and Prosecco DOCG?

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