



## SOLUTIONS

# Winning the Future Wine Consumer

After a sustained period of declining consumption, wine brands are reassessing how to engage consumers and stabilize the category. Gen Z is central to that recovery, as the first fully digital-native cohort to enter legal drinking age with distinct expectations around wellness, authenticity and convenience. Importantly, older Gen Z cohorts experienced COVID-19-related disruption during their formative consumption years, while younger cohorts are entering under more normalized conditions.

With the number of Gen Z drinkers projected to grow around 80% over the next five years, brands must sharpen their strategies to attract and retain these consumers. Realizing this opportunity will require navigating a structurally challenging environment.

## Structural headwinds are reshaping wine demand

Consumers are increasingly associating alcohol with health risks. A recent Gallup poll suggests that 53% of Americans believe one to two drinks per day is harmful to health, up from 39% in 2023. Broader wellness prioritization, including the growing use of GLP-1 medications, is adding further friction to routine consumption. Since 2019, legal-age drinking incidence has declined by approximately three percentage points, with consumers participating on fewer occasions and with greater intentionality.

In parallel, wine is losing share of total alcohol consumed. Consumers are gravitating toward formats perceived as simpler and more convenient, including ready-to-drink cocktails, hard seltzers, ciders, hard teas, and low- or zero-ABV options. Spirit and cocktail alternatives are capturing demand through flavor innovation, single-serve convenience, accessible pricing and marketing that reinforces cultural relevance.

Against this backdrop, the wine industry must align with more intentional consumption patterns and must clearly differentiate from substitute categories in the years ahead. While these pressures are real, emerging data suggest the outlook is not uniformly negative.

### **Recent trends point to reasons for optimism**

L.E.K. Consulting's survey data indicate that Gen Z's wine participation has increased meaningfully over the past two years, with 60% of legal-age Gen Z respondents reporting higher consumption. This challenges the narrative of permanent abstention among younger consumers. External surveys from IWSR and The Times suggest that monthlong abstinence behaviors such as Dry January may be losing momentum among younger drinkers, reinforcing the view that moderation trends may be stabilizing rather than accelerating. As Gen Z ages into the workforce, marriage and higher income, engagement is likely to move closer to that of older generations.

The divergence within Gen Z underscores the role of COVID-19 disruption during formative consumption years. Among legal-age consumers aged 21 to 24, 65% report higher wine consumption relative to three years ago, compared with 31% of those aged 25 to 29. Older members of the cohort experienced pandemic restrictions during their late teens and early 20s, a critical period for social habit formation and category experimentation.

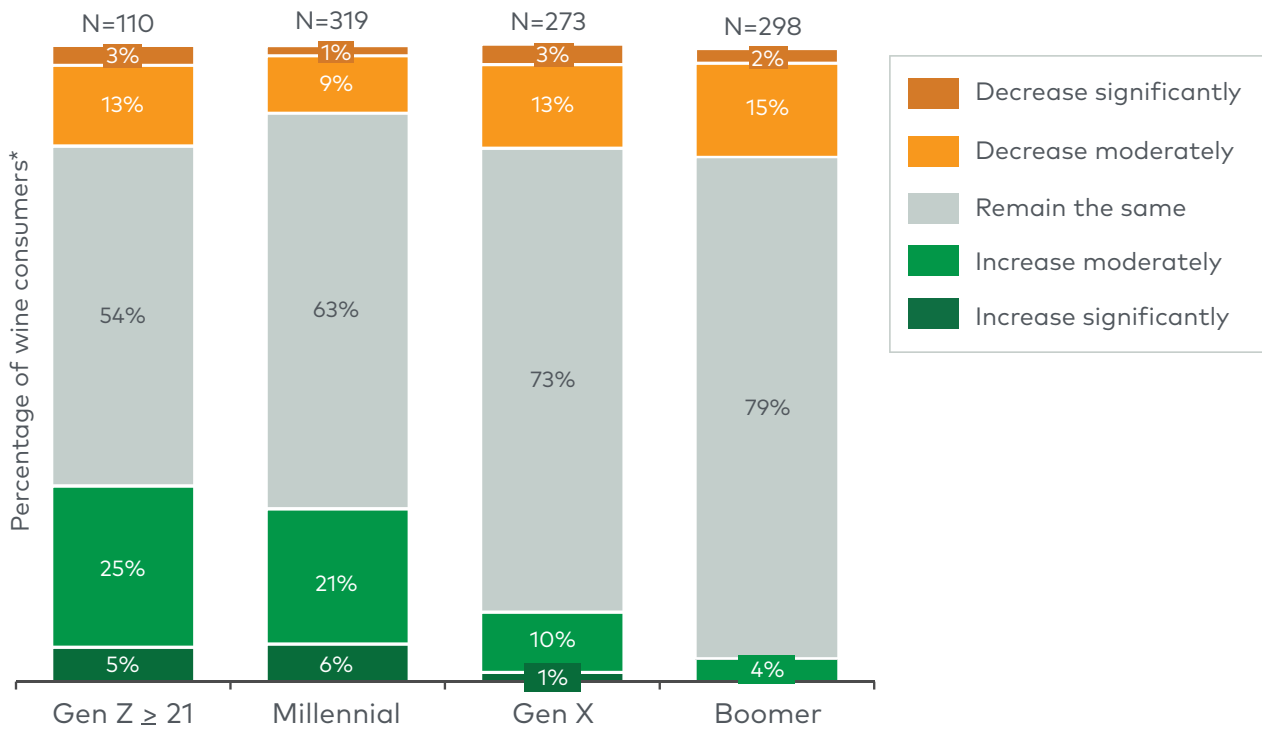
Younger Gen Z consumers, who entered legal drinking age under more normalized conditions, also express stronger forward intent, with a net 27% expecting to increase wine consumption over the next three years, versus 2% among those aged 25 to 29.

Looking ahead, approximately 30% of Gen Z wine drinkers expect to increase their consumption, citing primary drivers like wine's perceived natural and healthier profile relative to other alcohol categories, overall enjoyment, and strong fit with social occasions (see Figure 1a).

**Figure 1a**

Future expected volume of consumption among wine drinkers

**Expected change in wine consumption among wine consumers**



\*Survey question: Over the next three years, how do you expect your wine consumption frequency to change?  
 Source: L.E.K. 2026 wine consumer survey; L.E.K. research and analysis

Importantly, nonconsumers of wine, particularly within Gen Z, also signal future interest. Motivations center on learning more about wine, participating in more food-led and social occasions, and engaging in tastings and winery visits.

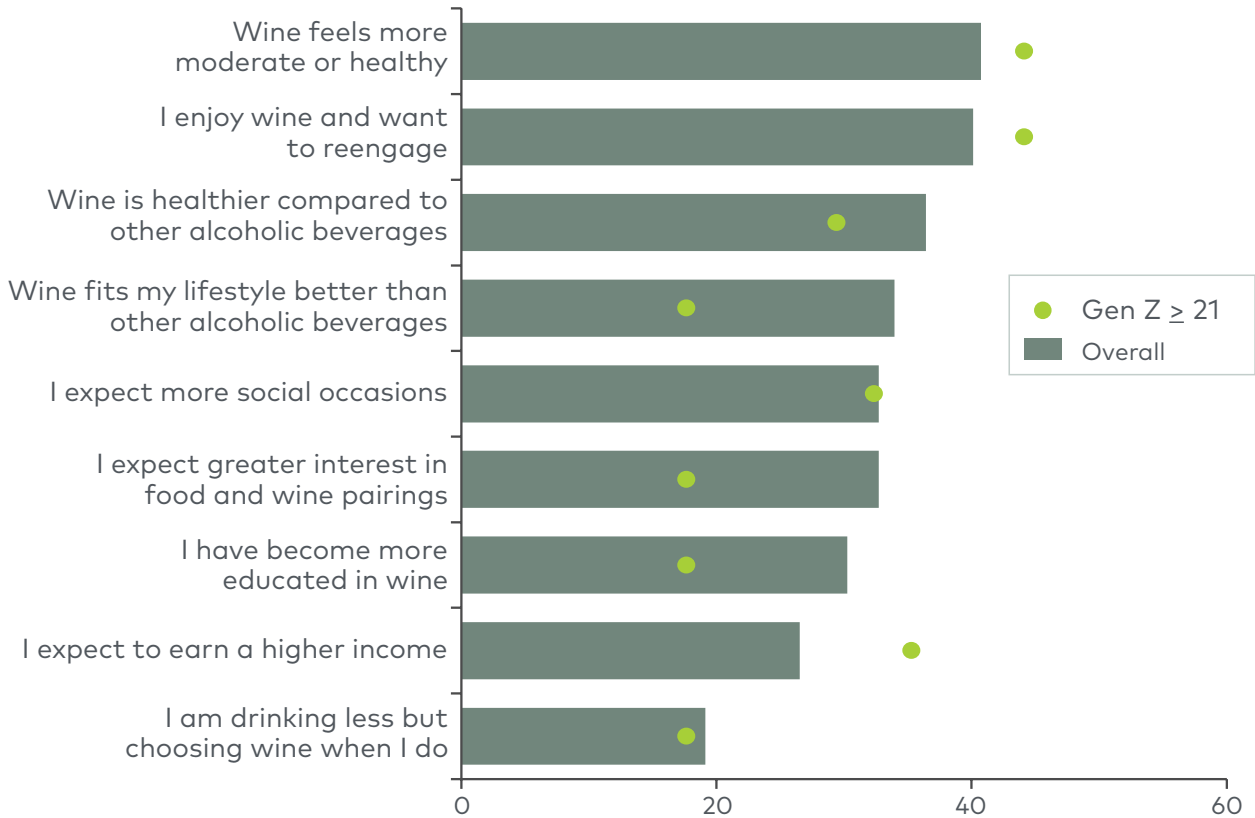
Together, these signals point to a tangible opportunity for the industry to reengage the next generation of wine drinkers (see Figure 1b).

**Figure 1b**

Future expected volume of consumption among wine drinkers

**Reasons for intent to increase wine intake**

Percentage of wine drinkers who indicate intent to increase wine consumption\*



\*Survey question: You mentioned that you expect to increase your wine intake in the next three years. Which of the following options best describes why?

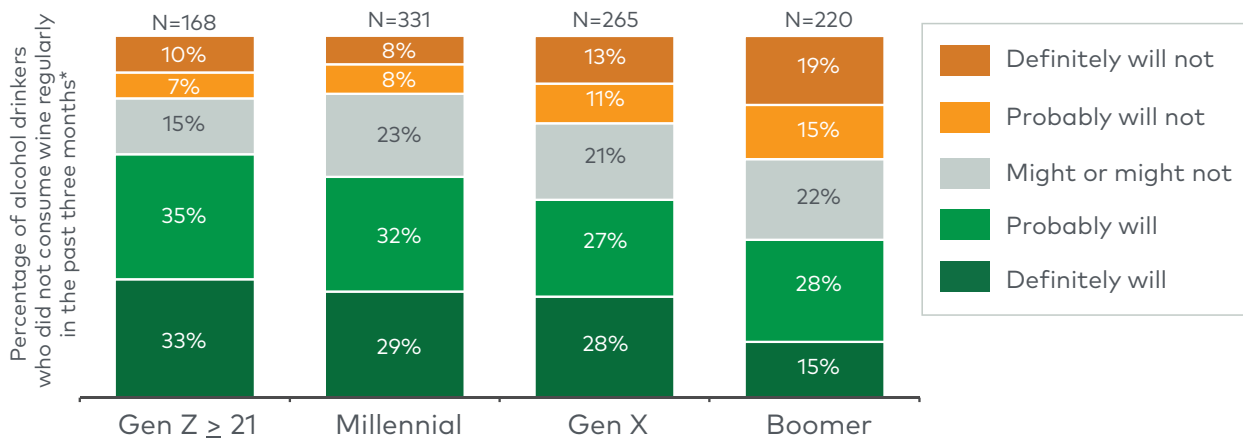
Source: L.E.K. 2026 wine consumer survey; L.E.K. research and analysis

**How brands should approach the Gen Z opportunity**

As moderation trends stabilize and more Gen Z consumers enter legal drinking age, the priority is twofold: defend loyalty among core consumers while recruiting the next cohort into the category. Wine’s path forward rests on reinforcing its structural strengths. The category remains embedded in social ritual, closely linked to food occasions, and perceived as more natural and better aligned with wellness than many alternatives. Sustained focus on these advantages should position wine to capture incremental engagement as younger cohorts mature (see Figure 2a).

Figure 2a

Nonconsumer interest in beginning to drink wine  
**Intent to drink wine in the next year among nonconsumers**



\*Survey question: Over the next three years, how do you expect your wine consumption frequency to change?  
 Source: L.E.K. 2026 wine consumer survey; L.E.K. research and analysis

At the same time, brands must address perceived barriers to consuming wine. Wine can feel inconvenient to carry, less socially visible than competing formats, expensive, misaligned with taste expectations and complicated to choose. Reducing these frictions will be essential to translating interest into sustained participation (see Figure 2b).

Figure 2b

Nonconsumer interest in beginning to drink wine

**Reasons for interest in drinking wine in the next year among nonconsumers**

Percentage of alcohol drinkers who indicate "definitely will" and "probably will" drink wine\*



\*Survey question: You mentioned that you expect to increase your wine intake in the next three years. Which of the following options best describes why? Note: ABV=alcohol by volume  
 Source: L.E.K. 2026 wine consumer survey; L.E.K. research and analysis

We have identified five priority areas for brands to consider.

**1. Expand convenience through accessible formats**

Increase availability in formats that lower commitment and that travel across occasions, including smaller bottles, multipacks, cans and resealable options. Innovation should focus on pack sizes that reduce trial risk; formats that are easy to transport; and offerings that fit casual, on-the-go and single-serve moments.

**2. Broaden relevance across everyday occasions**

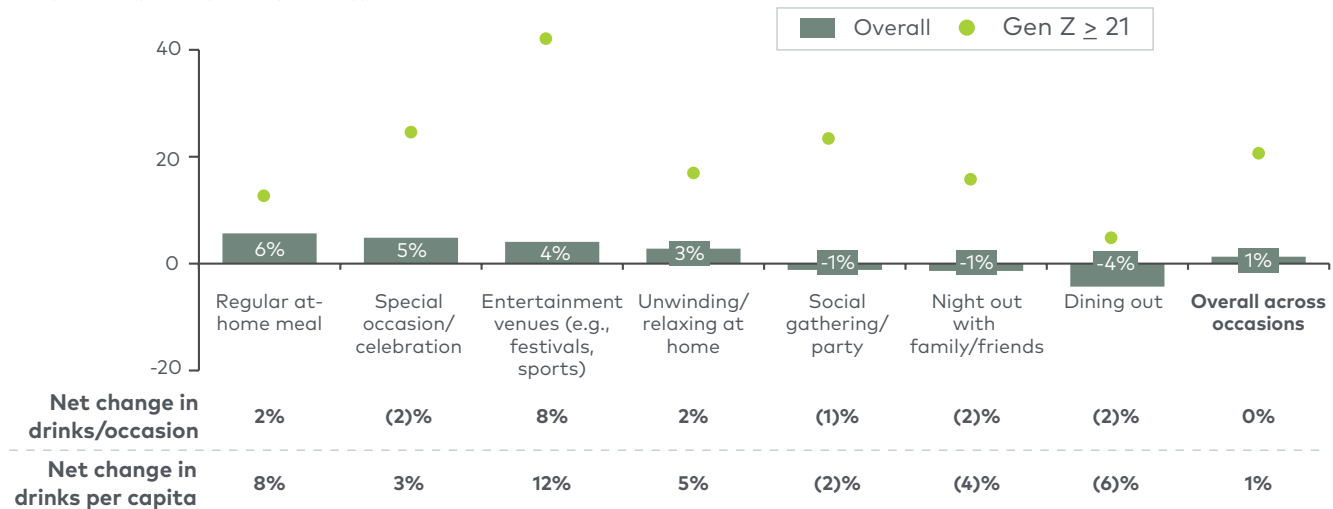
Wine remains strongly associated with formal settings, yet stated consumption intent is rising in more casual contexts, including regular at-home meals, entertainment venues such as festivals and sports events, and unwinding or relaxing at home (see Figure 3). Brands should create clearer permission for wine in these moments through targeted messaging, partnerships and occasion-led product positioning.

**Figure 3**

Change in number of wine-drinking occasions

**Expected change in wine-drinking occasions, by occasion**

Net percentage of wine consumers intending to increase number of drinking occasions (N=220 (Gen Z)/747 (overall))\*



\*Survey questions: Compared to today, how do you expect the number of occasions per month when you drink wine to change in the next three years? Compared to today, how do you expect the number of glasses of wine per occasion to change in the next three years?  
Source: L.E.K. 2026 wine consumer survey; L.E.K. research and analysis

### 3. Simplify messaging and invest in consumer education

Labels, menus and digital touchpoints should more clearly articulate taste profiles, sweetness cues, pairing shortcuts and occasion-based recommendations. Making wine easier to understand reduces intimidation, supports discovery and builds confidence among newer consumers.

### 4. Align marketing with Gen Z discovery behaviors

Gen Z is discovery-led and digitally native, relying on creators, peer reviews and social platforms to validate choices. Brands should prioritize social proof, culturally relevant partnerships and community-based engagement. Physical touchpoints such as wine bars and tasting rooms remain important entry points, and wine clubs can serve as structured on-ramps for guided discovery and repeat engagement, with Gen Z now accounting for approximately 20% of wine club membership, up materially from recent years. Ensuring the category shows up where Gen Z socializes, both digitally and in person, is critical to sustained relevance.

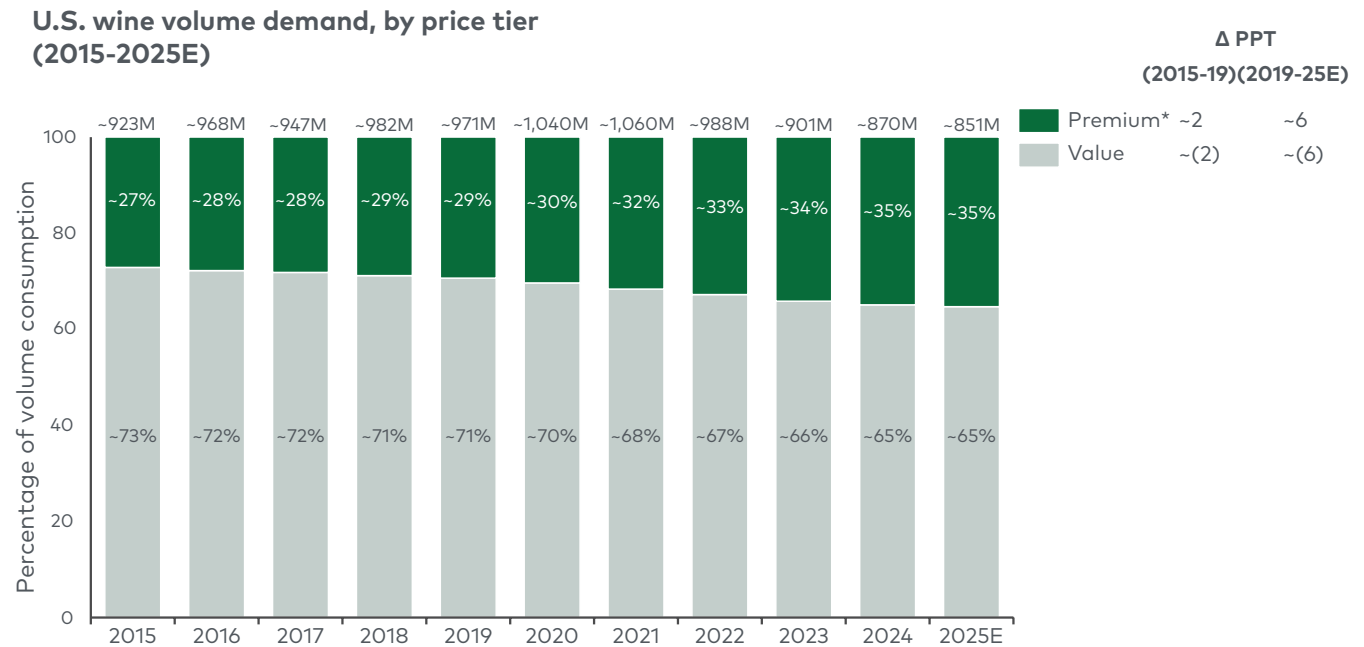
### 5. Lean into premium resilience

While total category demand has declined, premium segments, particularly bottles priced at \$15 and above at retail, have shown relative resilience (see Figure 4).

**Figure 4**

Mix shift toward premium wine

**U.S. wine volume demand, by price tier (2015-2025E)**



\*Premium wine denotes standard-sized bottles (750 ml) priced at \$15 and above in retail  
 Source: SipSource; Wine Institute; L.E.K. research and analysis

As consumers drink more selectively and shift toward fewer, better-quality purchases, brands in the premium price tier that deliver clear quality cues, differentiated positioning and cultural relevance are better positioned to sustain demand and capture share.

### About the research

This report draws from a survey of 1,000 wine consumers we conducted in February 2026, supplemented by secondary research and trend analysis across generational cohorts.

The research assesses how consumer discovery, purchase and consumption, and perceptions of wine have been evolving, and what these shifts imply for wine participation going forward.

For more information, please [contact us](#).

## About the Authors



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## About L.E.K. Consulting

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