

WINE – US – 2023

Wine is experiencing an identity crisis, alongside a range of cultural shifts towards alcohol. Concerted efforts are required to bring wine into a new era.



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This report looks at the following areas:

- Wine and broader alcohol consumption habits
- Attitudes about alcohol
- Attitudes about wine, by price point
- Formats of wine purchased
- Associations with wine, by format
- Attitudes about wine, including health and value

Overview

Wine is stuck between the hyper-casual, easy to drink RTDs and the more complex craft cocktail. Wine as a category is incredibly diverse, especially when looking beyond the glass bottle; yet consumers may be confused with when and how to deploy different options to suit different experiences. Individual brands can help by reframing their own wines as specific to occasions on a scale from most to least casual. Trying to be everything to everyone is a fast way to fail.

This is especially true for Gen Z, who hold some contradictory beliefs about wine. [49% of Gen Z](#) agree that some wine is worth paying more for and 55% believe quality wine can be in any package. But neither is translating to sales. Wines looking to win over younger consumers need to be clear on their role, either as daily drinkers or as special occasion selections.

The democratization of wine has stalled, in part, because wine knowledge has not followed suit. Marketing efforts need to be available and accessible as close to the point of purchase as possible. Reimagine the sommelier as quick videos or reads with recommendations based



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on occasion, flavor profile, or pairings, and put them next to wine lists, at the wine shop or for easy consumption while scrolling online.

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Report Content

EXECUTIVE SUMMARY

- What you need to know
- Consumer trends: key takeaways
- Exploring formats beyond the bottle is a balancing act
- Market predictions
- Opportunities
- Opportune moments have real range

CONSUMER INSIGHTS

The wine consumer fast facts

Profile of the wine drinker

- Wine's renaissance is within reach
 - Graph 1: alcoholic beverages drank most often – NET – any drink, 2023
- Wine fills in the gaps
 - Graph 2: alcohol beverages drank most often, 2023
- Women remain highly engaged with wine
 - Graph 3: alcohol beverages also drank, by gender, NET, 2023
 - Graph 4: alcohol beverages drank most often, by gender, NET, 2023
- Meet Gen Z where they are to compete with RTDs
 - Graph 5: alcohol beverages consumed – most often drink, by generation, 2023
 - Graph 6: alcohol beverages consumed – also drink, by generation, 2023
- Legacy high-brow associations may do more harm than good
 - Graph 7: alcohol beverages consumed – most often drink, by HHI, 2023
 - Graph 8: alcohol beverages consumed – also drink, by HHI, 2023
- Wine wins, occasionally
 - Graph 9: wine consumption by alcohol consumption frequency, 2023

Attitudes about alcohol

- Alcohol finds itself at a fork in the road
 - Graph 10: attitudes about alcohol, 2023
- Alcohol matters more to male identities
 - Graph 11: attitudes about alcohol, by gender, 2023
- Younger generations are torn about alcohol

- Graph 12: attitudes about alcohol, by generation, 2023

Associations with wine, by price point

- Casual occasions call for value
 - Graph 13: associations with specific types of wine, 2023
- Building a family of wines serves families of consumers
 - Graph 14: associations with specific types of wine, by gender – "Wine I buy", 2023
- Gen Z has a taste for value, and premium
 - Graph 15: associations with specific types of wine, by generation – "Wine I buy", 2023

Formats of wine purchased in the last three months

- Tenure in the wine space leads to most purchases
 - Graph 16: formats of wine purchased in the past three months, 2023
- Tides will change with format, slowly
 - Graph 17: formats of wine purchased in the past three months, by generation, 2023
- Perceptions stall purchase across HHI
 - Graph 18: formats of wine purchased in the past three months, by HHI, 2023

Associations with wine, by format

- Quality goes hand-in-hand with purchase
 - Graph 19: associations with specific wine formats, 2023
- Screw top rise signals room for change
 - Graph 20: associations with specific wine formats – good value, by various demographics, 2023
- Glass bottles are predictable safe bets, with broad appeal
 - Graph 21: associations with specific wine formats – good to have on hand, by various demographics, 2023
- Going too niche does canned, boxed a disservice
 - Graph 22: associations with specific wine formats – good for consuming in third spaces, by various demographics, 2023
- Glass bottled wine wins, across demographics
 - Graph 23: associations with specific wine formats – wine I purchase, by various demographics, 2023

Attitudes about wine

- Old attitudes die hard
 - Graph 24: attitudes about wine, 2023
- Tiny bubbles offer (slightly) new experiences
 - Graph 25: attitudes about wine and health, by gender, 2023
- On-the-go brings a youthful glow to wine
 - Graph 26: attitudes about wine and health, by generation, 2023

Attitudes about wine and value

- Wine compromise leaves something to be desired

- Graph 27: attitudes about wine and value, 2023
- Value in fine wine persists, trading down is a harder sell
 - Graph 28: attitudes about wine and value, by generation, 2023
- Wine has a unique value problem
 - Graph 29: attitudes about wine and value, by HHI, 2023

COMPETITIVE STRATEGIES

Launch activity and innovation

- Sustainability needs support
- Sustainability can't win without education
- Wine flies high with partnerships in the air
- Make it wine

Marketing and advertising

- Small details add up for big wins
- Consumers look to wine about ethics

Opportunities

- Wine-based cocktails and fruit infusions show unfulfilled promise
- Fruit-forward wines puts the best food forward
- Brand extensions build accessibility
- Wine does double duty as an ingredient
- Light at the end of the moderation tunnel

THE MARKET

Market context

Market drivers

- Consumer confidence ebbs and flows
- Environmental concerns touch down across production chain
- Sustainable wine has a steep hill to climb
- Health concerns edge out alcohol
 - Graph 30: alcohol attitudes, trended, 2022-23

Market size and forecast

- Retail sales and forecast of wine
- Wine struggles in its current era
- Retail sales and forecast of wine

Market share/brand share

- Josh Cellars star continues to rise

APPENDIX

- Market definition
- Consumer research methodology
- Generations
- Abbreviations and terms
- Forecast
- Forecast fan chart

Company and brand

- Sales of domestic table/still wine sold by 9-liter cases, by company
- Imported table/still wine sold by 9-liter cases, by company, 2021 and 2022
- Sherry/vermouth/champagne sold by 9-liter cases, by company, 2021 and 2022

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