



Where did all the wine lovers go?

Strategies for Attracting and Retaining Fresh Audiences



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What's Going On?

The Current State of Wine Consumption by Generation

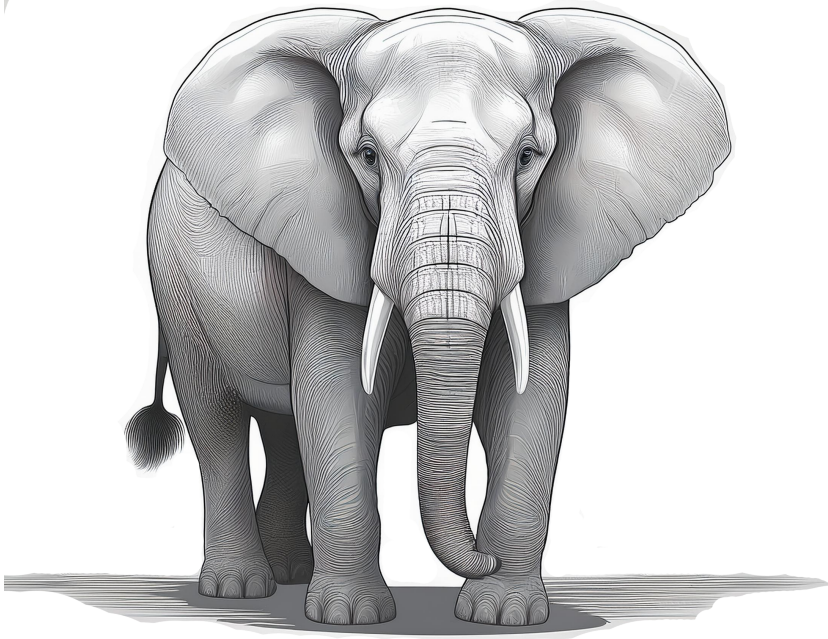


Why Are Wine Sales Down?

65%

of Volume Change

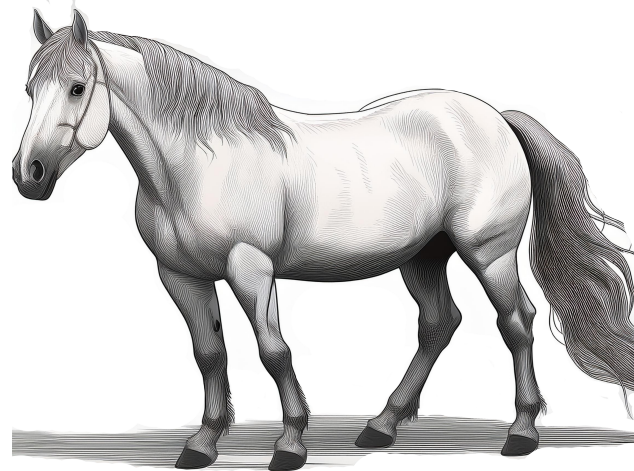
Wine drinkers
drinking less
frequently.



19.3%

of Volume Change

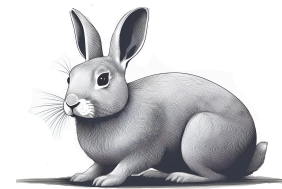
Wine drinkers drinking
less volume.



7%

of Volume Change

Wine drinkers leaving.



Decrease in Consumption coming From 65+

Index vs. Total Sample

	Segment	Total Sample	Less Wine	More Wine
Gender	Male	39%	88	112
	Female	61%	107	92
Age	21-24	5%	102	173
	25-40	42%	103	121
	41-55	28%	98	83
	56-65	16%	82	83
	65+	10%	121	48
Income	Low (<\$50k)	35%	109	85
	Medium (\$50k-\$100k)	36%	96	103
	High (>\$100k)	29%	98	118



The Largest Age Group Within High-End Wine Buyers is Aged 21-39

Q: When purchasing wine, how much do you typically spend on a 750ml bottle for each occasion?

	21-39	40-59	60+	Average
Weekday dinner at home	\$31.94	\$24.22	\$18.55	\$26.37
Relaxing at home after work or on the weekend	\$34.32	\$25.12	\$20.31	\$27.98
Gourmet sit-down meal at home	\$44.41	\$37.46	\$29.92	\$39.11
Bring to a friend's home for dinner or a gift	\$46.40	\$38.84	\$31.36	\$40.57
Bring to a friend's home for dinner or a gift	\$65.80	\$49.78	\$36.67	\$53.93



What Creates an Interest in High-End Wine?

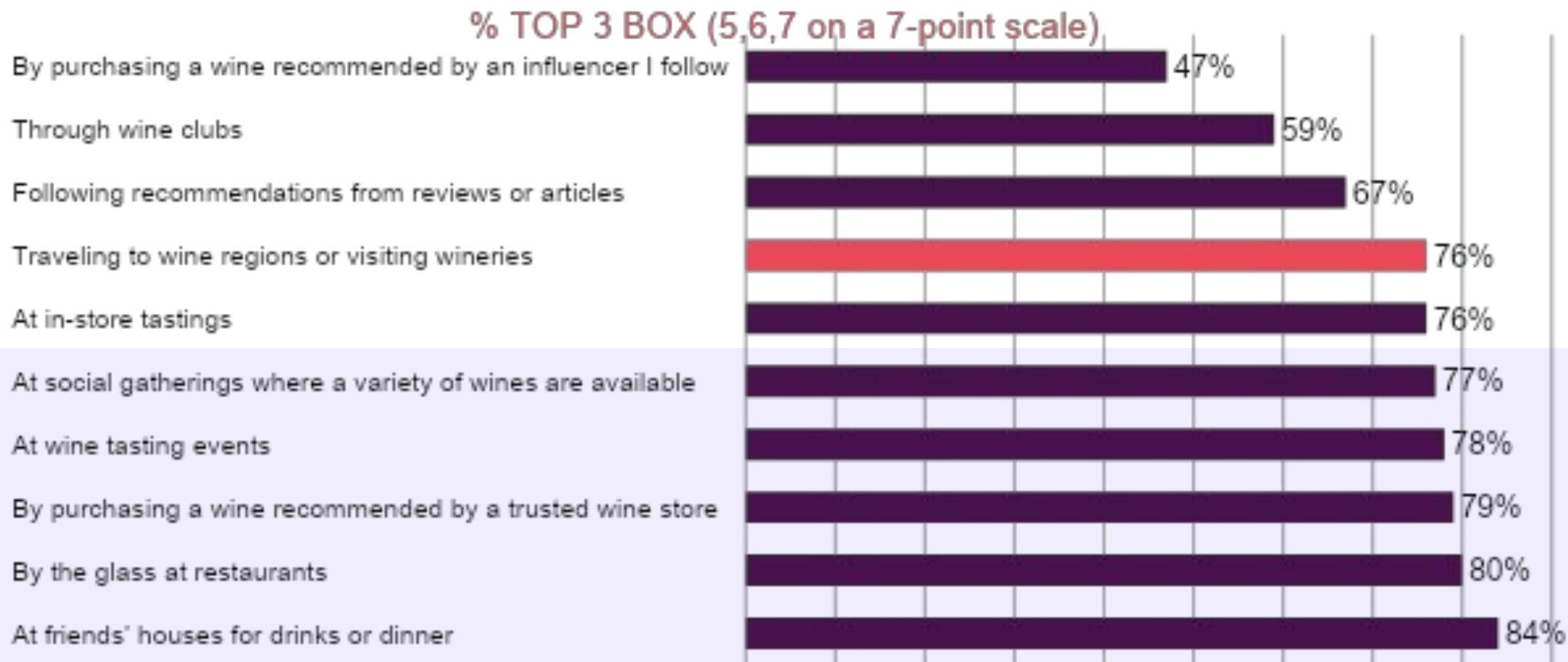
79%

“The decision to start or increase purchase over \$20 was the result of a ‘gateway’ wine that really impressed them.”



Travel is an Important Introduction to Wine

Q: Thinking about where you like to discover new wines that cost more than \$20, please indicate your opinion on the following:



How Does Travel Influence Connections to Wine?

82% 78%

“Visiting wine regions gave them a deeper appreciation of both wine and region”

“When they travel, they like to learn about the wine in that area”

Novice and Infrequent Drinkers Less Likely to Go to Wine Country

Q: In a typical year, how frequently do you visit a wine region for entertainment or recreation?

	Wine Purchase Behavior		Wine Bottles Owned			Wine Knowledge			Average
	Purchase \$50+ Wines Monthly	Purchase \$50+ Wines Less Than Monthly	0-5	6-24	25+	Novice	Intermediate	Expert	
Monthly or More	44%	11%	14%	17%	12%	8%	14%	43%	<div></div>
Yearly (1-3 per Year)	49%	53%	41%	58%	68%	38%	58%	49%	<div></div>
<1 per Year/Never	7%	36%	45%	25%	20%	54%	28%	9%	<div></div>





Travel Profiles

Diving Into the Complex Web of Motivations By Generation



It's Not Age...It's Technology

Decision-Making

- Research
- Speed
- Risk Tolerance

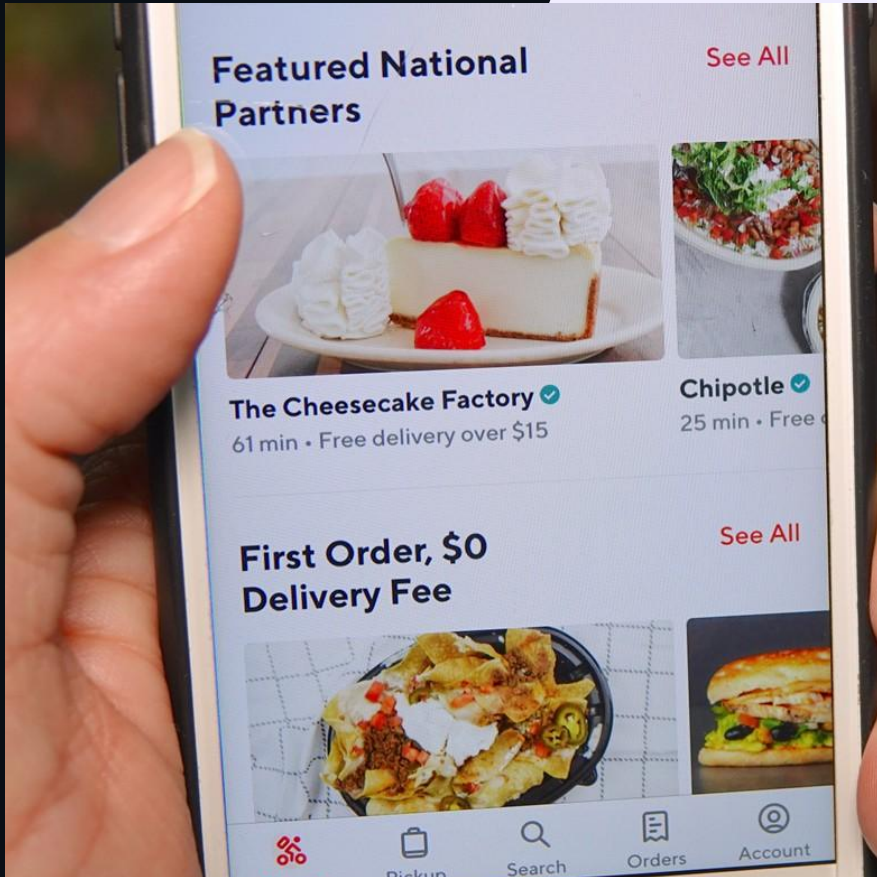


It's Not Age...It's Technology

Decision-Making

- Research
- Speed
- Risk Tolerance

Value Structure



It's Not Age...It's Technology

Decision-Making

- Research
- Speed
- Risk Tolerance

Value Structure

World View



It's Not Age...It's Technology

Decision-Making

- Research
- Speed
- Risk Tolerance

Value Structure

World View

Individuality & Privacy



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World View

Individuality & Privacy

Social Environment & Influence



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Importance of Product Versus Company



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Individuality & Privacy

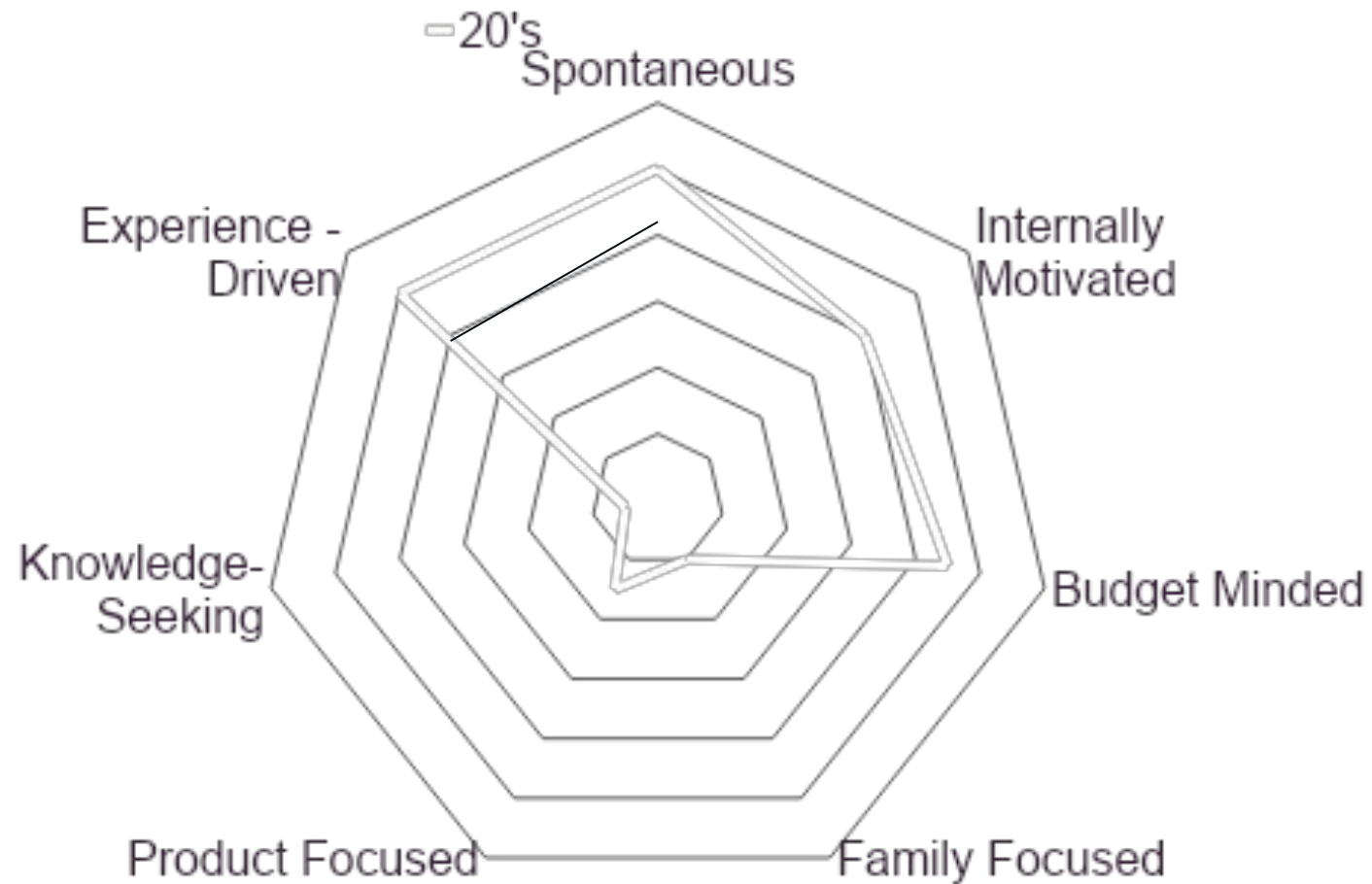
Social Environment & Influence

Importance of Product Versus Company

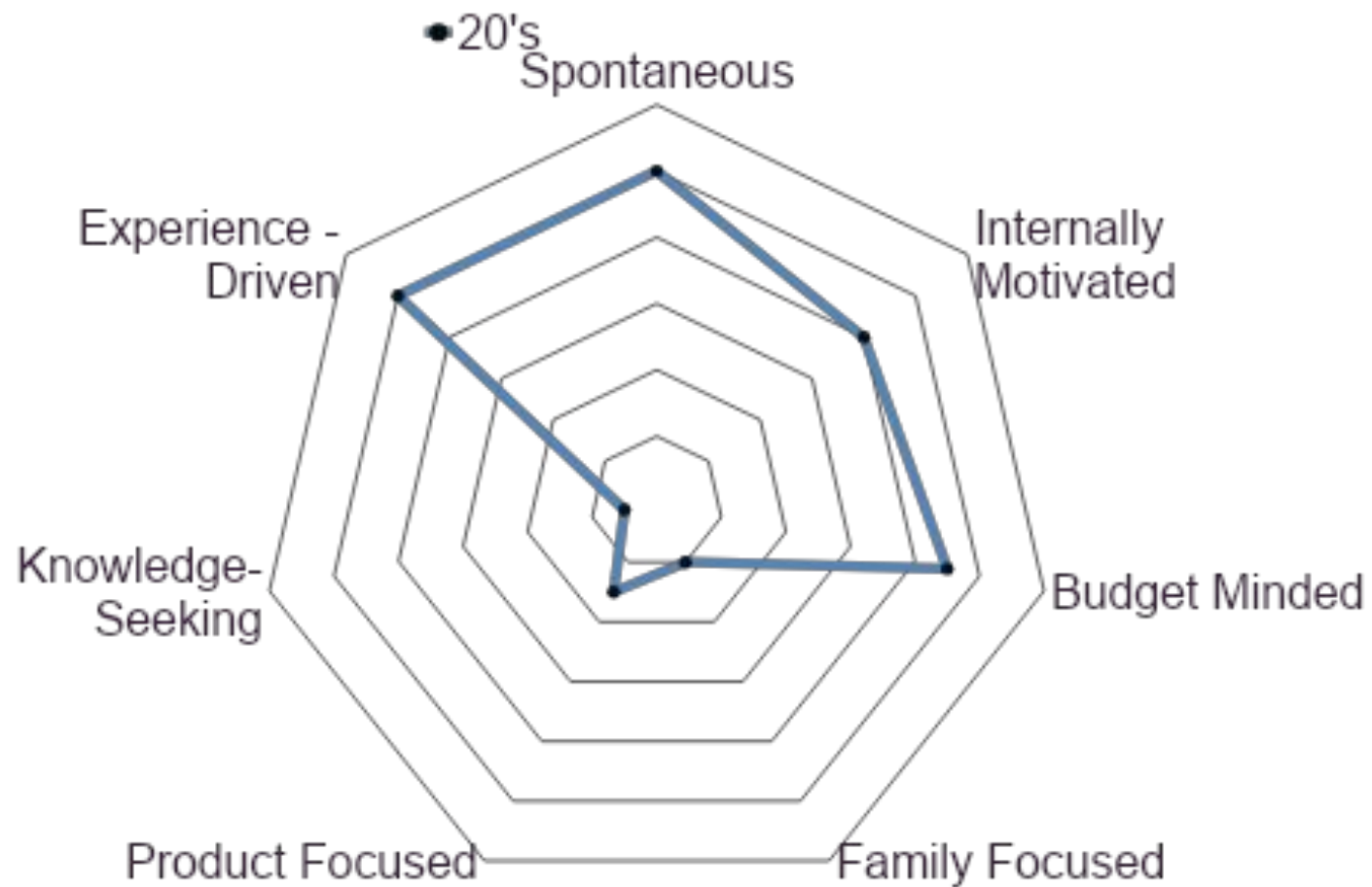
Purpose of a Vacation



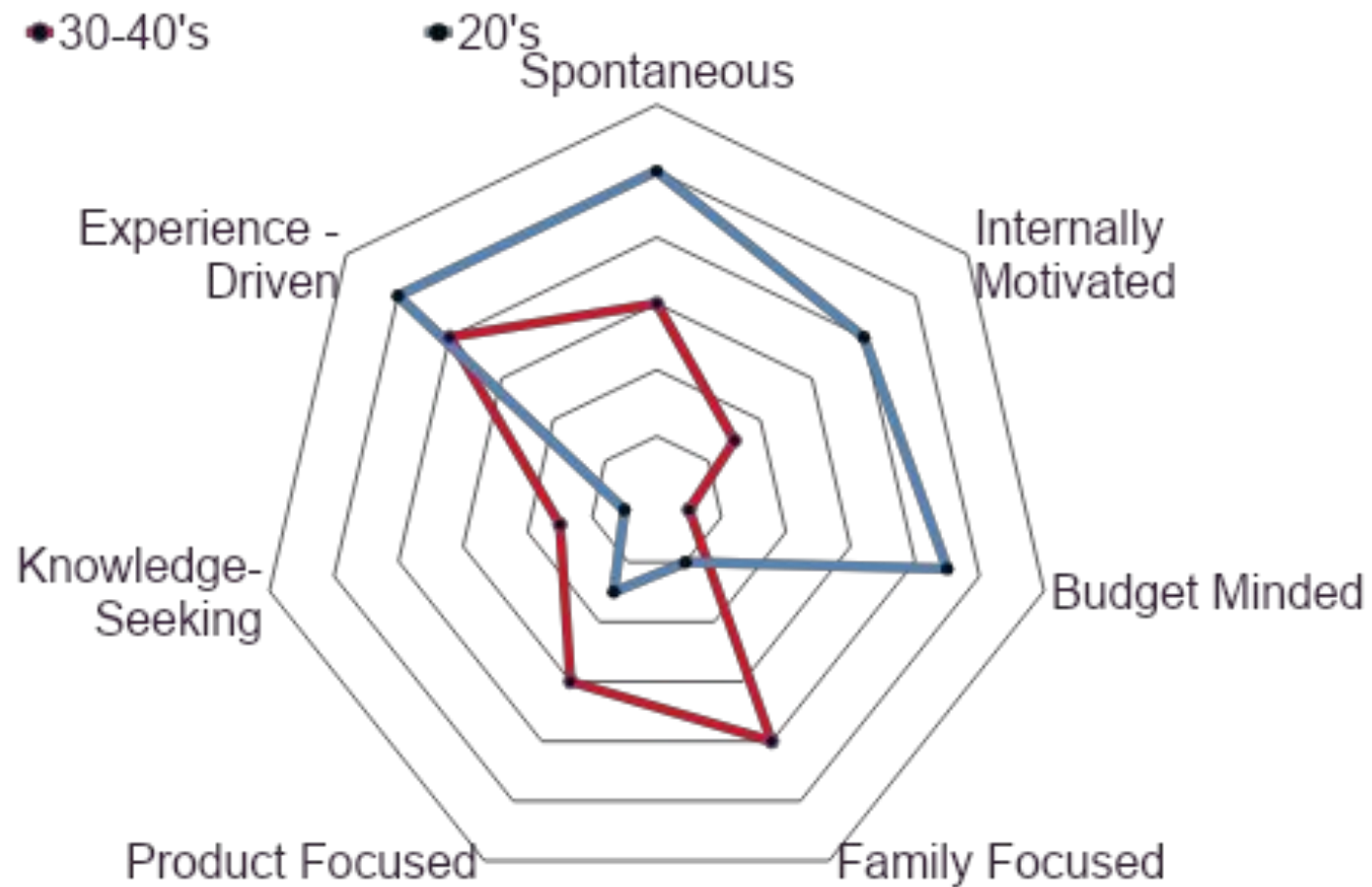
Resulting in a Complex Web of Motivations



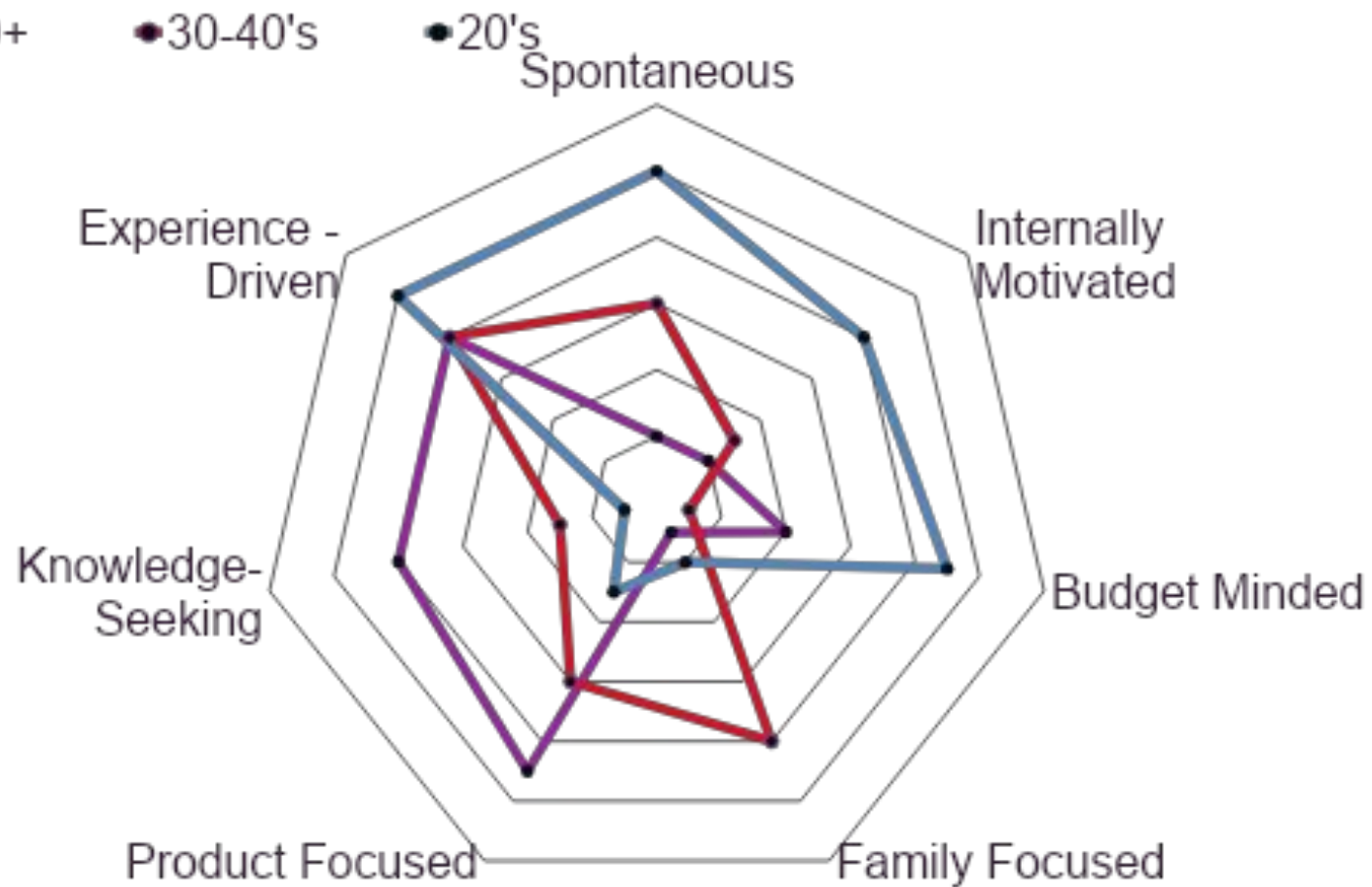
Resulting in a Complex Web of Motivations



Resulting in a Complex Web of Motivations



Resulting in a Complex Web of Motivations



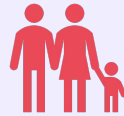
Roger's Weekend Retreat



Age: 67



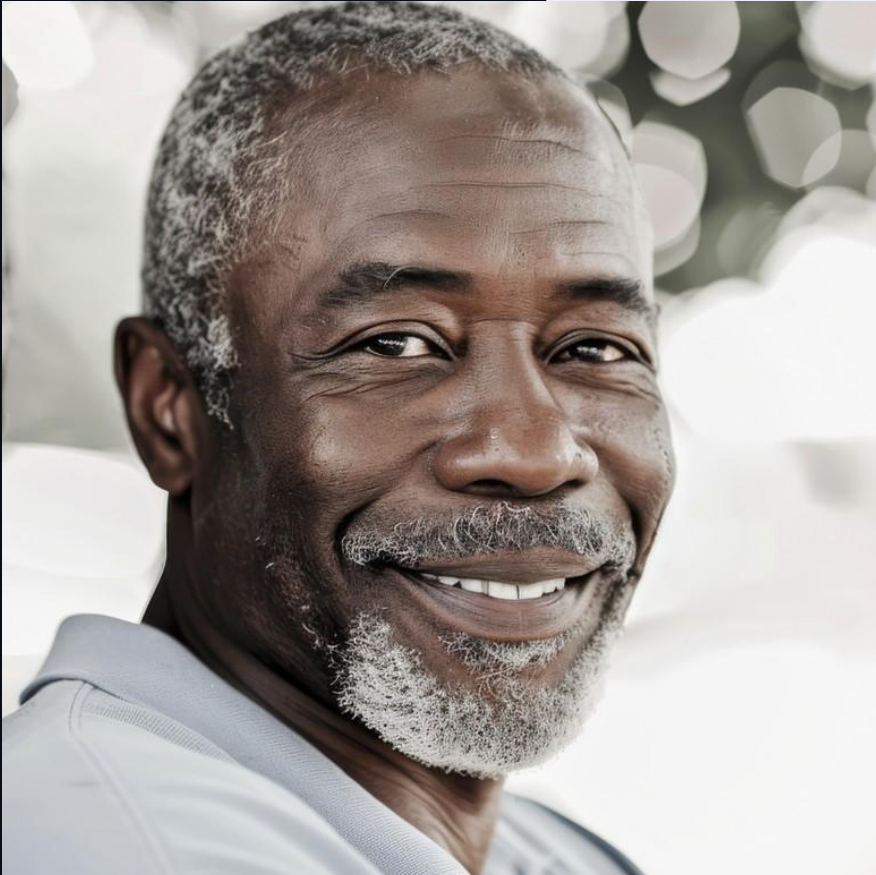
Occupation: Semi-retired insurance agent



Family: Wife Linda of 35 years



Approach: Work hard, play hard — he's earned his leisure time, and he's going to do it right



Takeaways From Roger's Journey



Research
Driven



Experience
Seeker



Savoring the
Moment



Practical
Yet Open

Advice for Wineries with Older Audiences

Offer guided and educational experiences

Emphasize heritage and product quality

Create pre-planned itineraries

Offer on-site perks/special access

Discounts



Matt & Sarah's Weekend Escape



Age: 42



Occupation: Marketing Manager



Family: Married to Sarah (39), with their 2-year-old daughter, Chloe



Approach: Get out of the city and unplug with the family!

Takeaways From Matt & Sarah's Journey



Family
Friendly



Simplified
Necessities



Balance
Education
And Fun



Create
Memories

Advice for Wineries

Targeting 30's-40's

Make it cross generational

Simplify the booking experience

Emphasize convenience – and it's ok to charge for it

Market to people, not just wine lovers

Provide range of prices

Be transparent





Kayla's Creative Getaway



Age: 24



Occupation: Social Media Coordinator



Family: Lots of friends – like her bestie, Jess



Approach: Down for Whatever, but on a budget – she's all about unique experiences she can share online

Takeaways From Kayla's Journey



Impulsive



Experience of
Expertise



Aesthetic
Driven



Sustainability
Matters

Advice for Wineries With a Young Audience

Curate Instagrammable moments

Focus on fun and interaction

Social Media with valuable content

Encourage spontaneity

Sustainability facts

Keep booking mobile friendly



Matt



Simplicity &
Variety

Roger

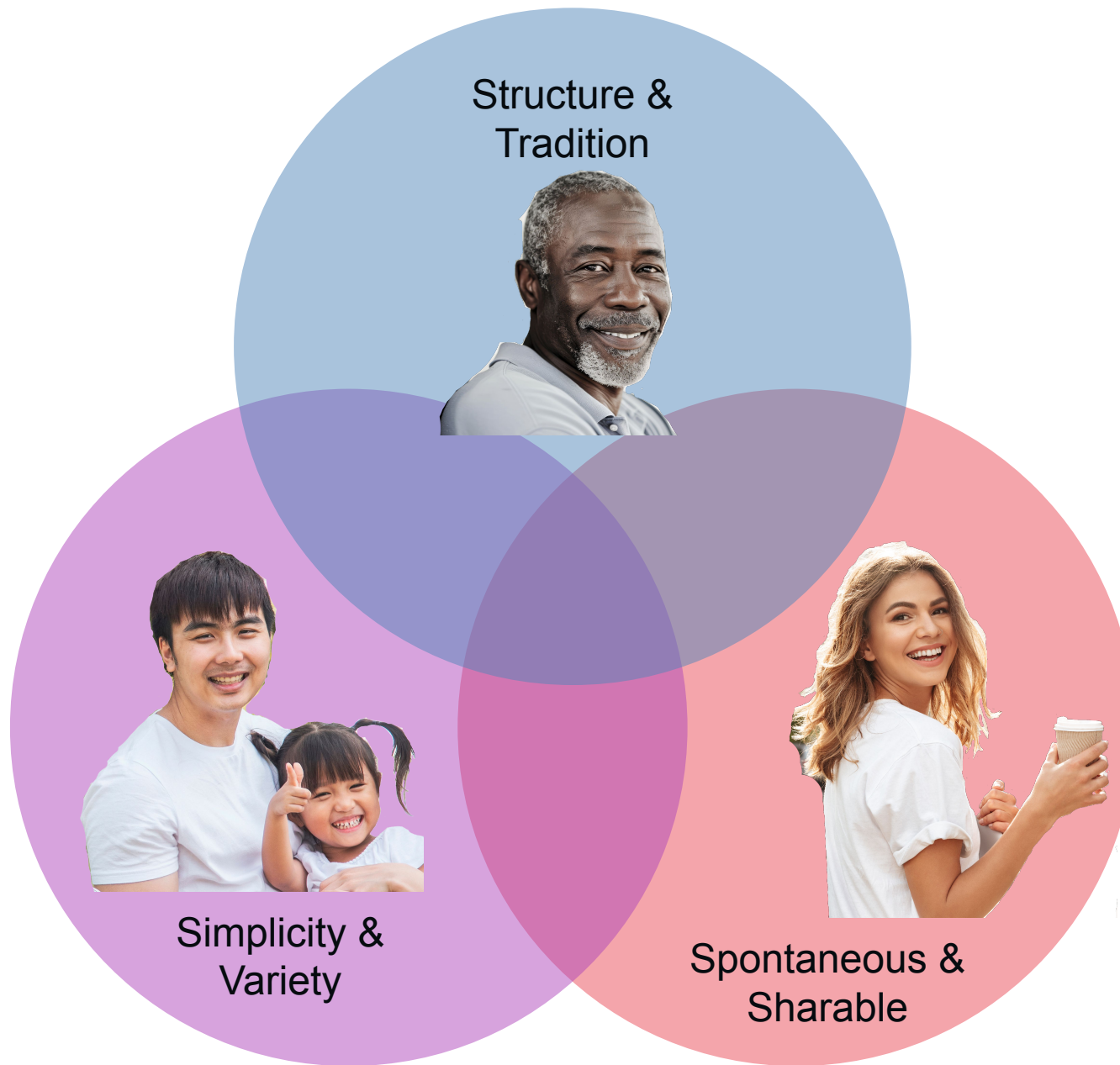


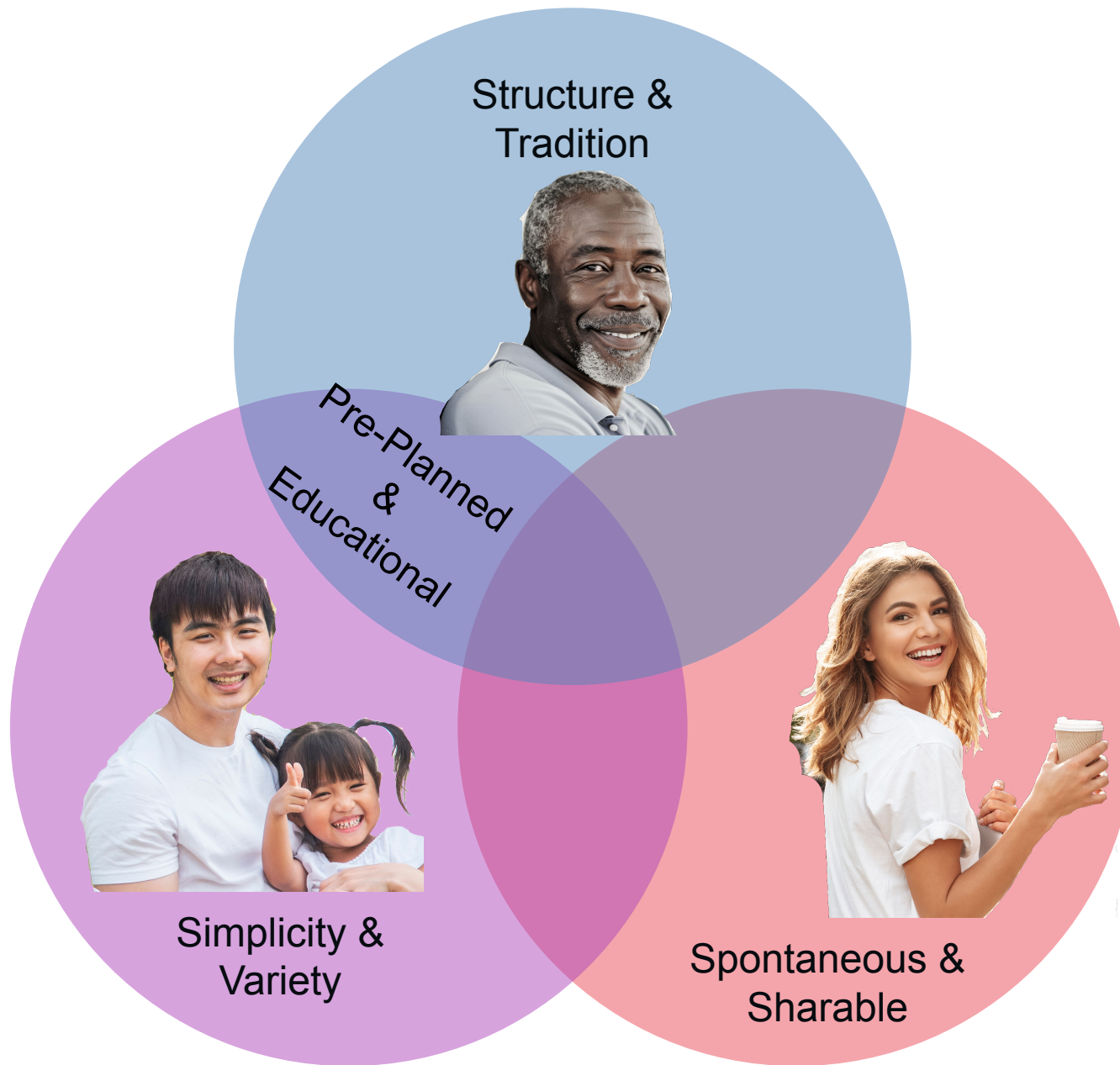
Structure &
Tradition

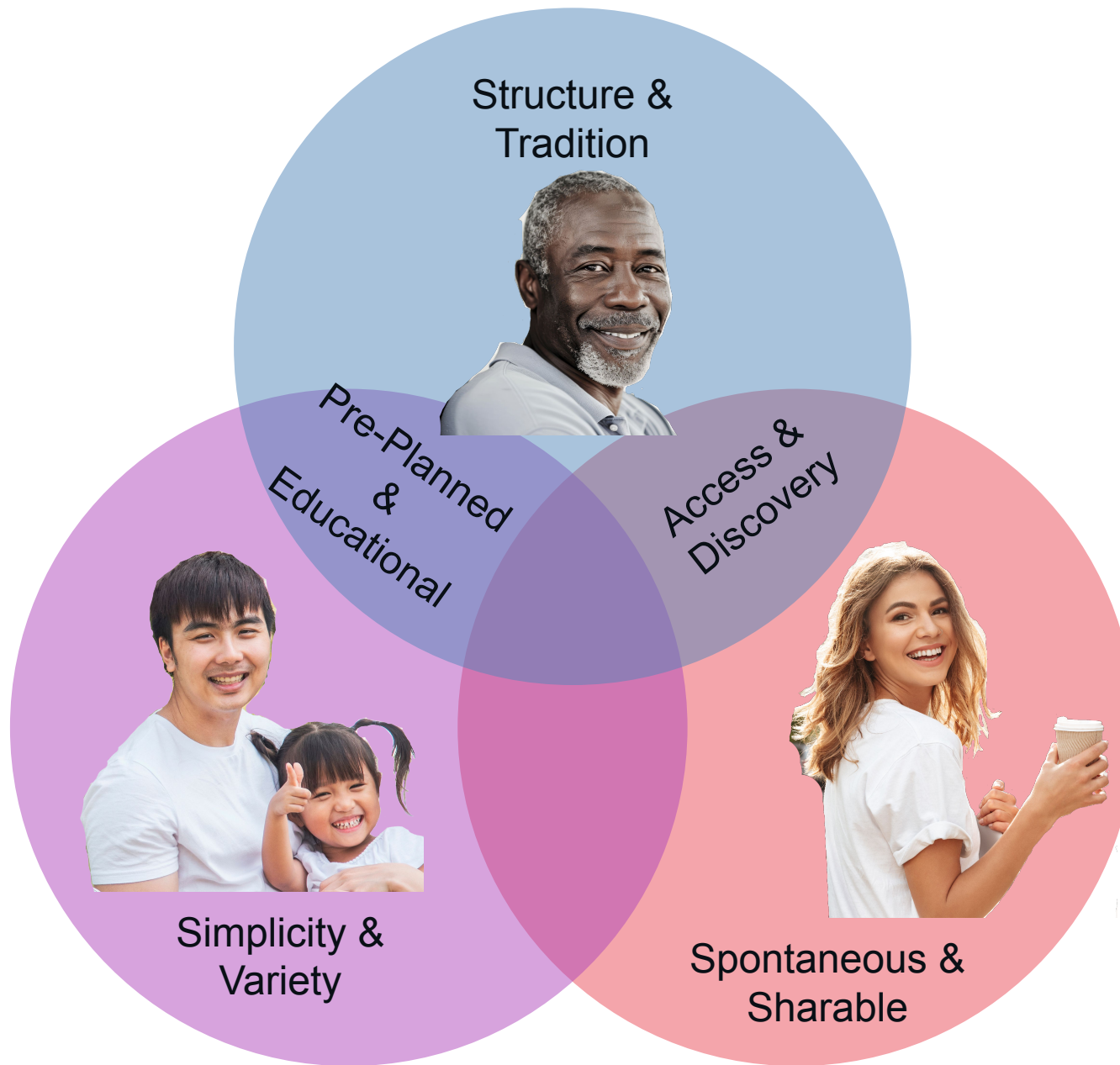
Kayla

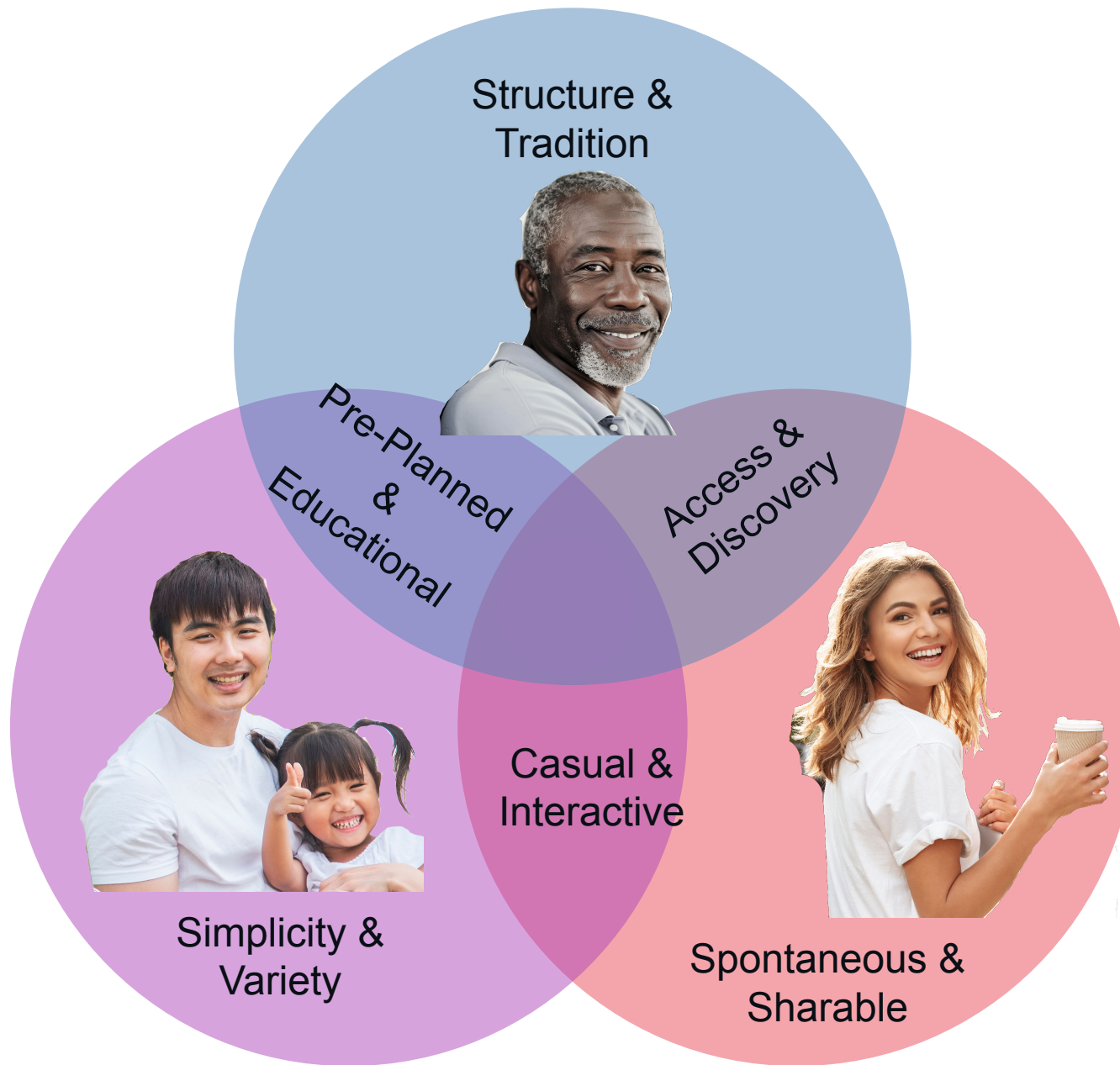


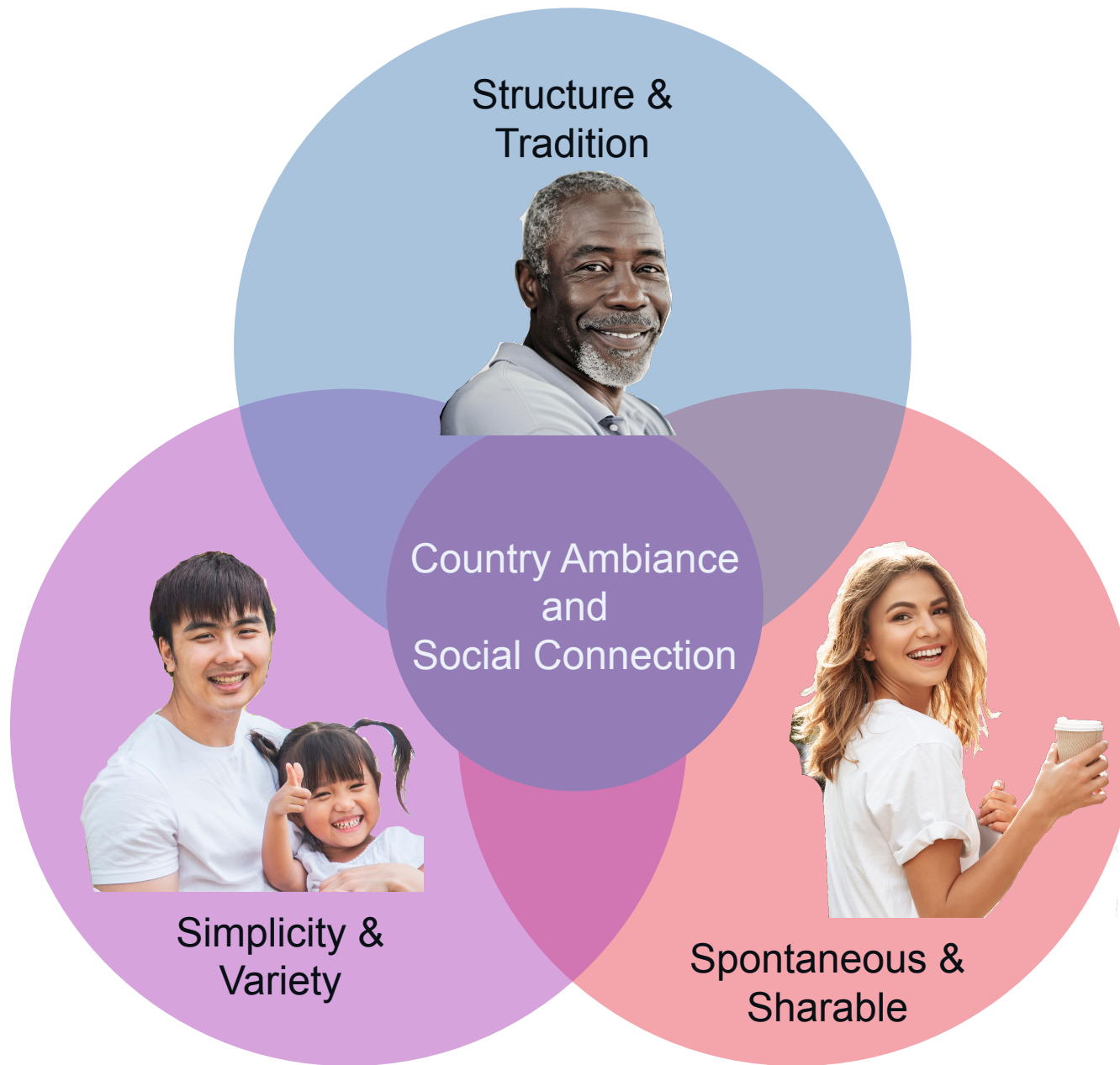
Spontaneous &
Sharable











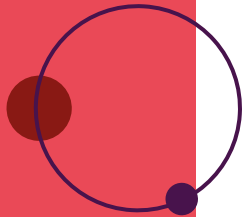
Hospitality Remains a Top Draw for Consumers

Q: When visiting a winery, please check the 3 most important winery FEATURES for you.



SOURCE: 2024 Wine Market Council Wine Club/DTC Consumer Benchmark Study REPORT

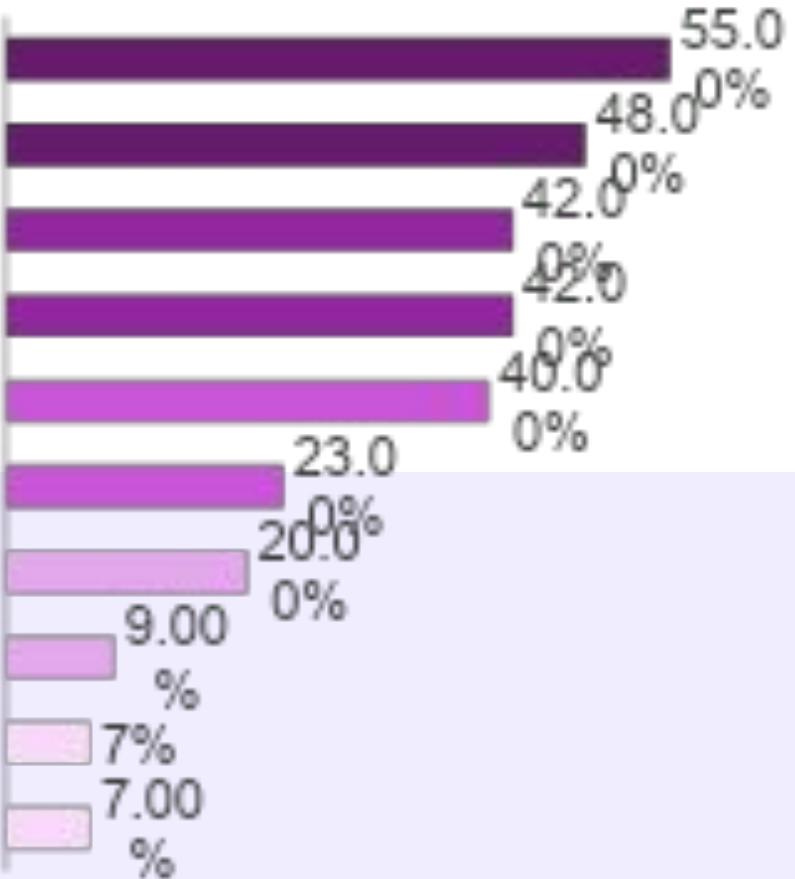




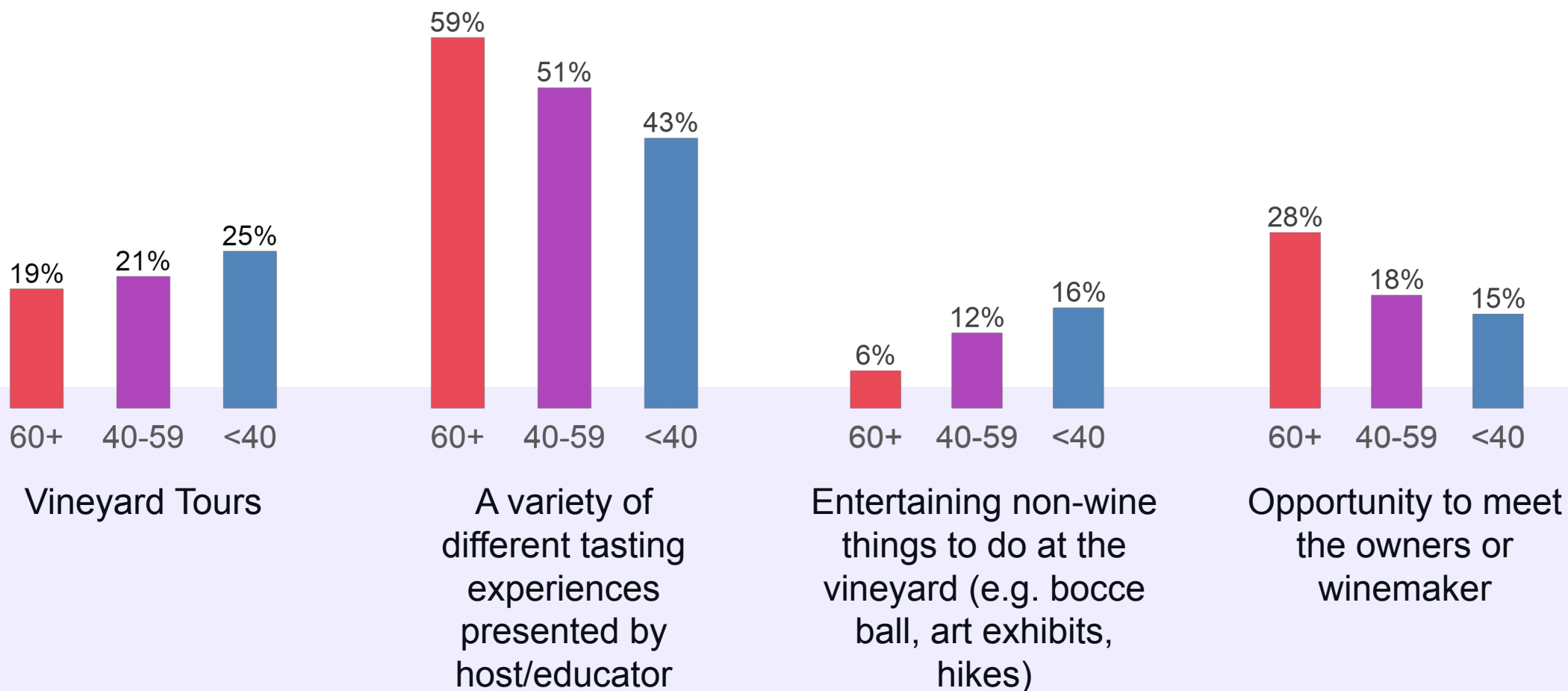
Variety and New Experiences Are Key

Q: When visiting a winery, please check the 3 most important winery ACTIVITIES for you.

- variety of different tasting experiences presented by host/educator
- tastings of rare or older vintage wines
- wine-food pairings or lessons
- personal/private tasting experiences
- ours/tastings of new, unbottled wines or barrel samples
- opportunity to meet the owners or winemaker
- vineyard tours
- on-wine things to do at the vineyard (e.g. bocce ball, art exhibits, hikes)
- winemaking demonstrations or viewing
- culinary seminars or demonstrations



There Are Some Generational Differences





Trends Impacting Travel

Looking Forward to 2025

2025 Travel Trends

Wellness, Sleep and Longevity



2025 Travel Trends

Wellness, Sleep and Longevity

Astro-Tourism/Noctourism





2025 Travel Trends

Wellness, Sleep and Longevity

Astro-Tourism/Noctourism

Set Jetting

2025 Travel Trends

Wellness, Sleep and Longevity

Astro-Tourism/Noctourism

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Coolcations





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Off Beaten Path

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Off Beaten Path

Multi-Generational Travel







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