



Time to Notice Gen X, *the Generation that Drinks*

#NewConsumer: Decoding Consumer Behaviour

Kaleigh Theriault

Director of Beverage Alcohol Thought Leadership

NielsenIQ (NIQ)

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*Shape.
Create.
Elevate.*

March 15-17
2026

Düsseldorf
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Topics for Discussion

Notice the Wallet

Gen X is the spending powerhouse

Notice the Wine

Gen X is a core wine cohort—high penetration, high value, evolving occasions

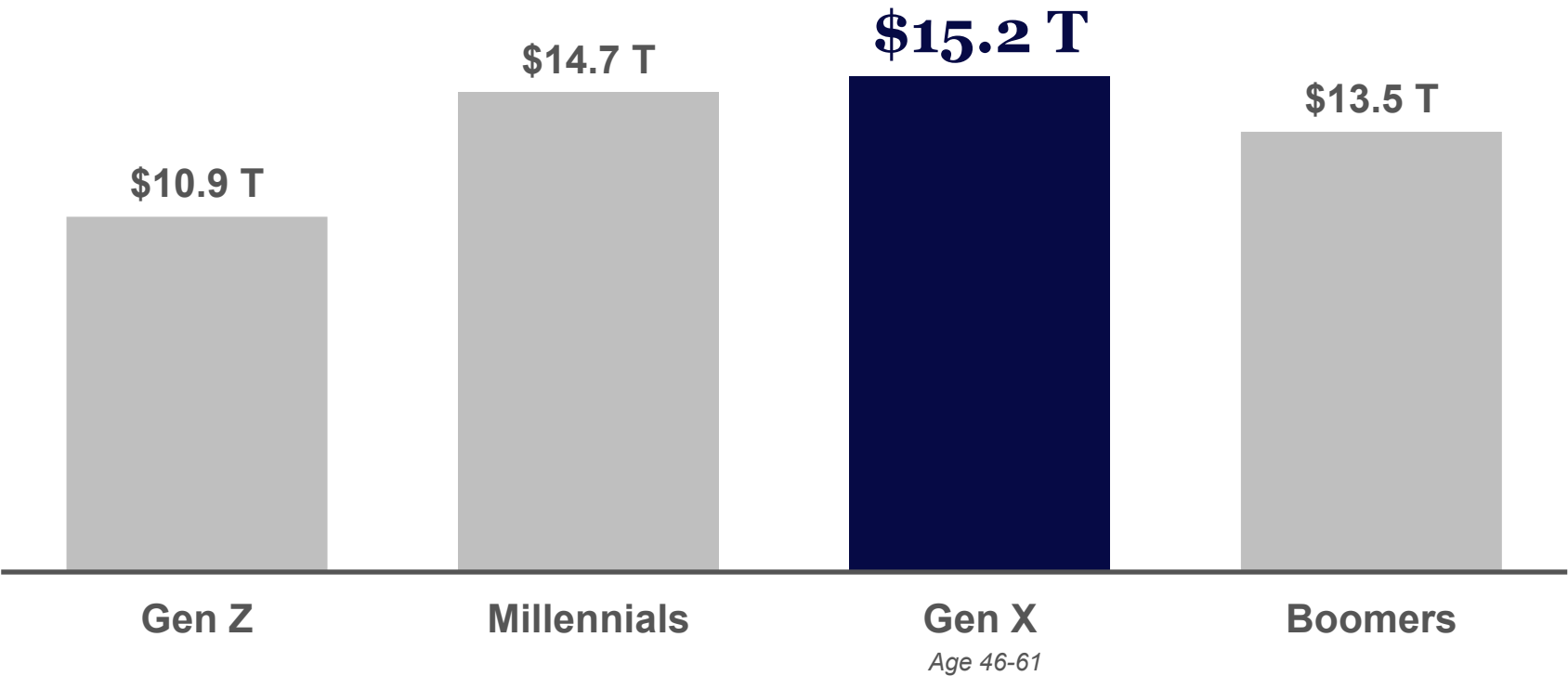
Notice the Win

“Value plus” + trust + occasion design (simple, targeted plays that move volume and value)

Gen X is the spending engine and drove an estimated \$15.2 T in global spend in 2025

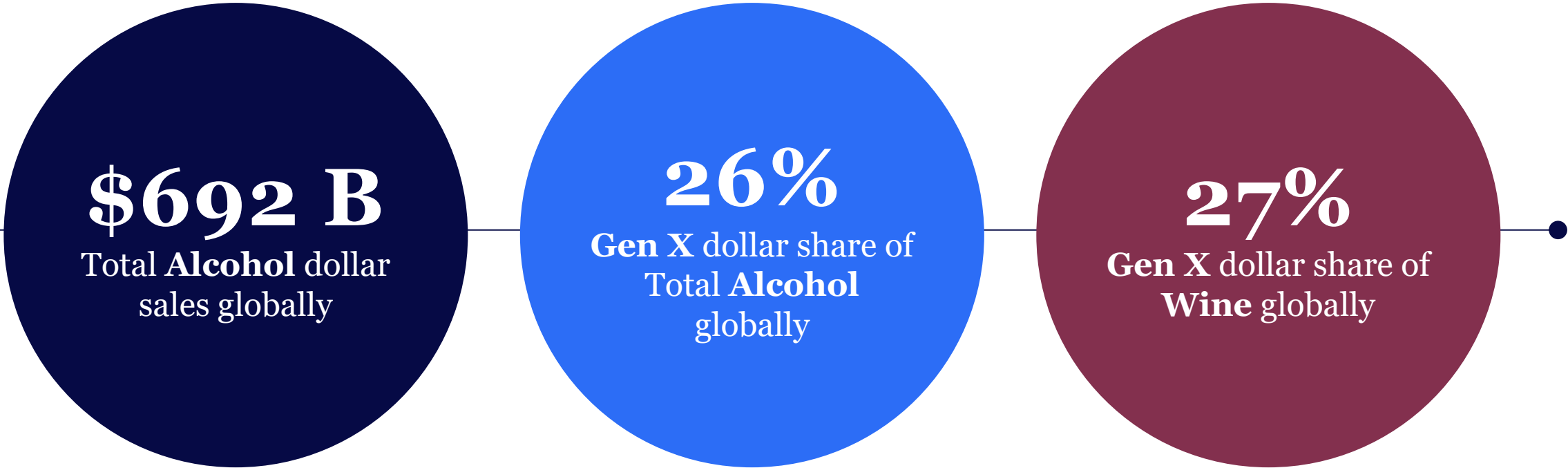
Gen X is born 1965–1980, with 1.4 Billion in population, smaller than Millennials and Gen Z

Global Total Spending by Generation
Nominal USD in Trillions



Source: NielsenIQ x World Data Lab, The X Factor Report 2025

Global Alcohol x *Gen X* by the Numbers



Source: NielsenIQ x World Data Lab, *The X Factor Report 2025*

Alcohol isn't “growing its way out” of this moment

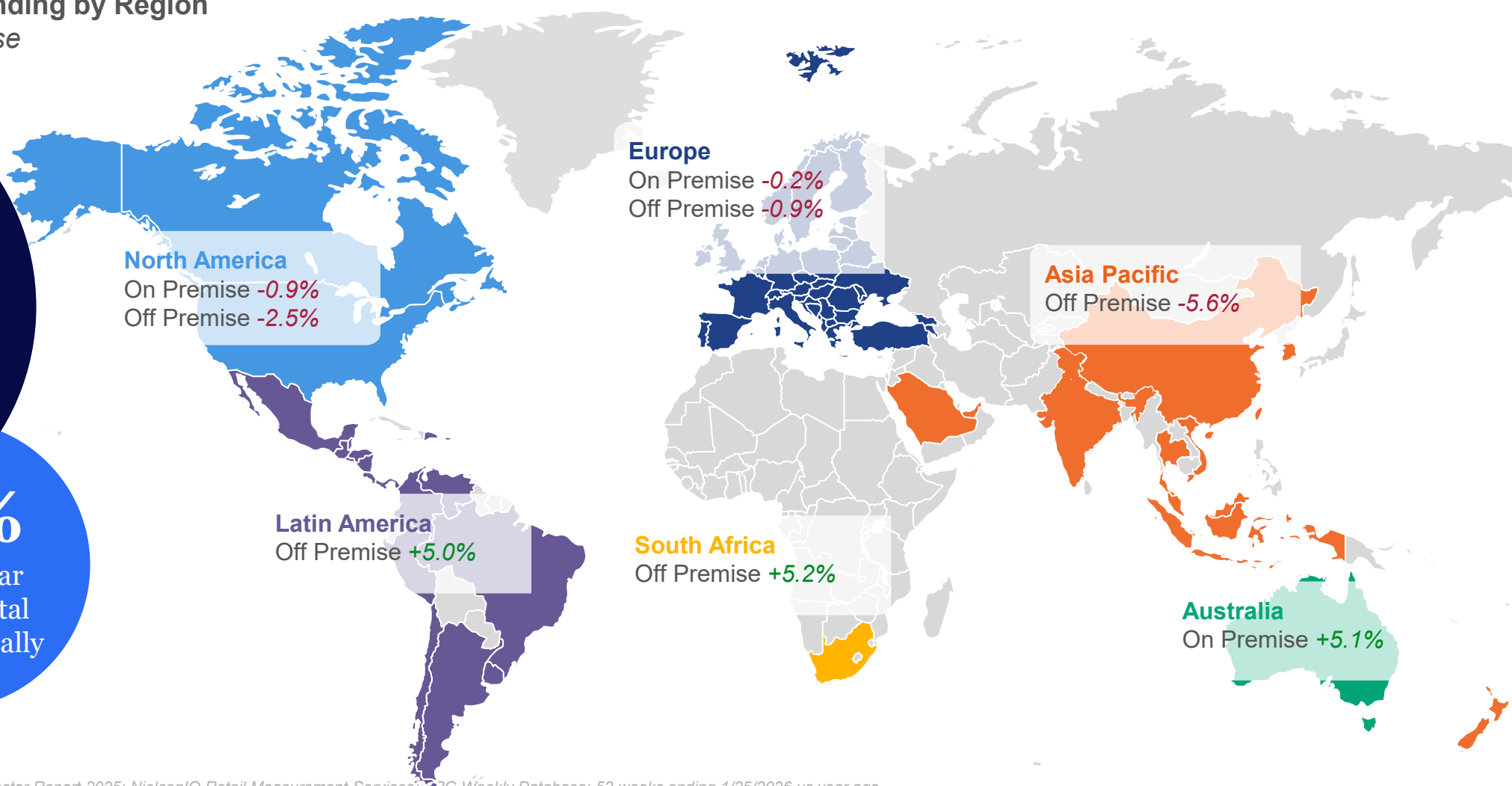
The game becomes: *win the right buyers, for the right occasions, with the right proposition*

Global Total Alcohol Spending by Region
On Premise and Off Premise

\$692 B
Total Alcohol dollar sales globally

26%
Gen X dollar share of Total Alcohol globally

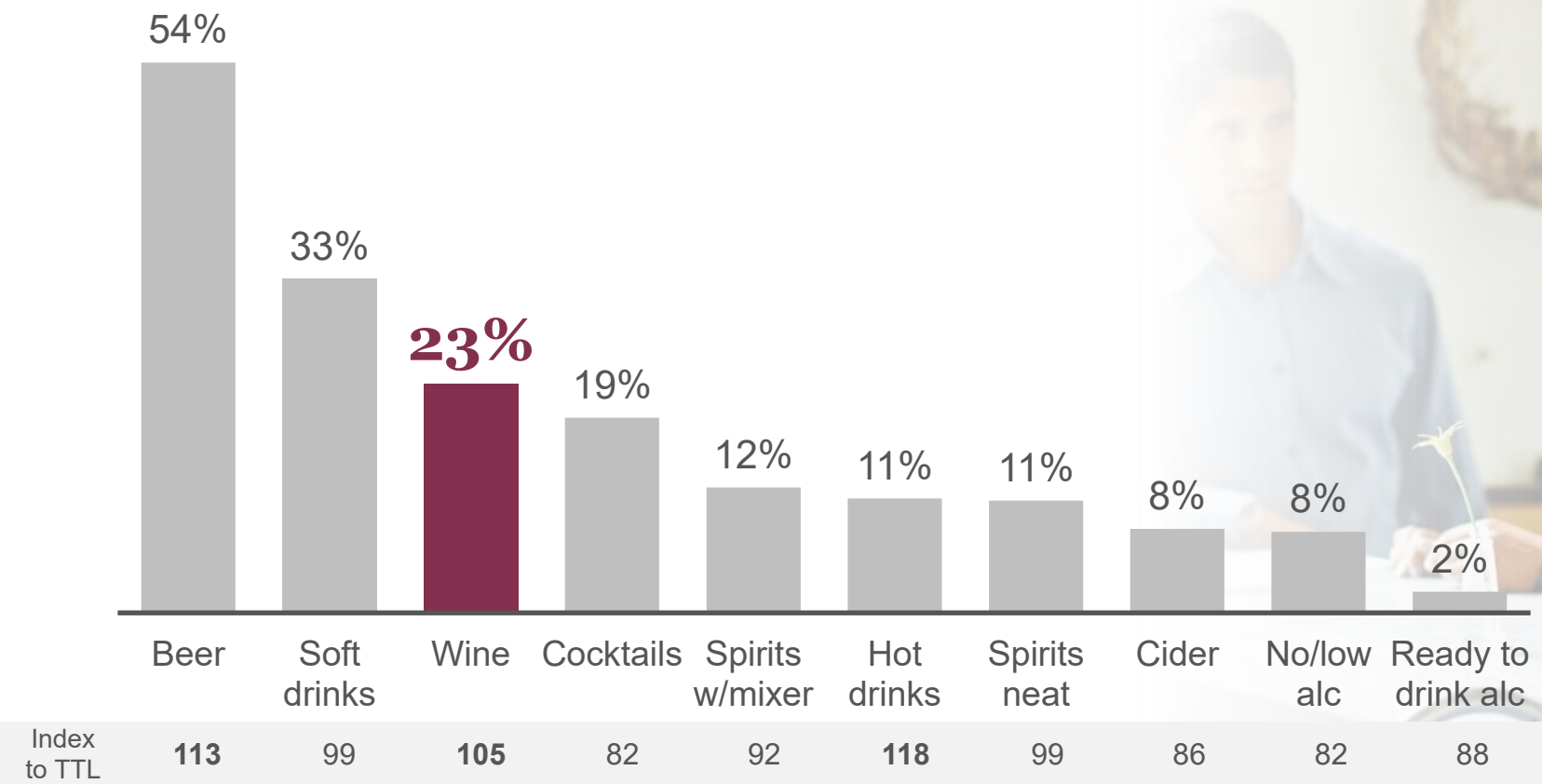
27%
Gen X dollar share of Wine globally



Source: NielsenIQ x World Data Lab, *The X Factor Report 2025*; NielsenIQ Retail Measurement Services; IRI Weekly Database; 52 weeks ending 1/25/2026 vs year ago

What is *Gen X* drinking when at cafes, bars, and restaurants?

Drinks Choices: Which of the following types of drinks do you typically drink when out in cafes, bars, restaurants and other similar venues?
Global On Premise

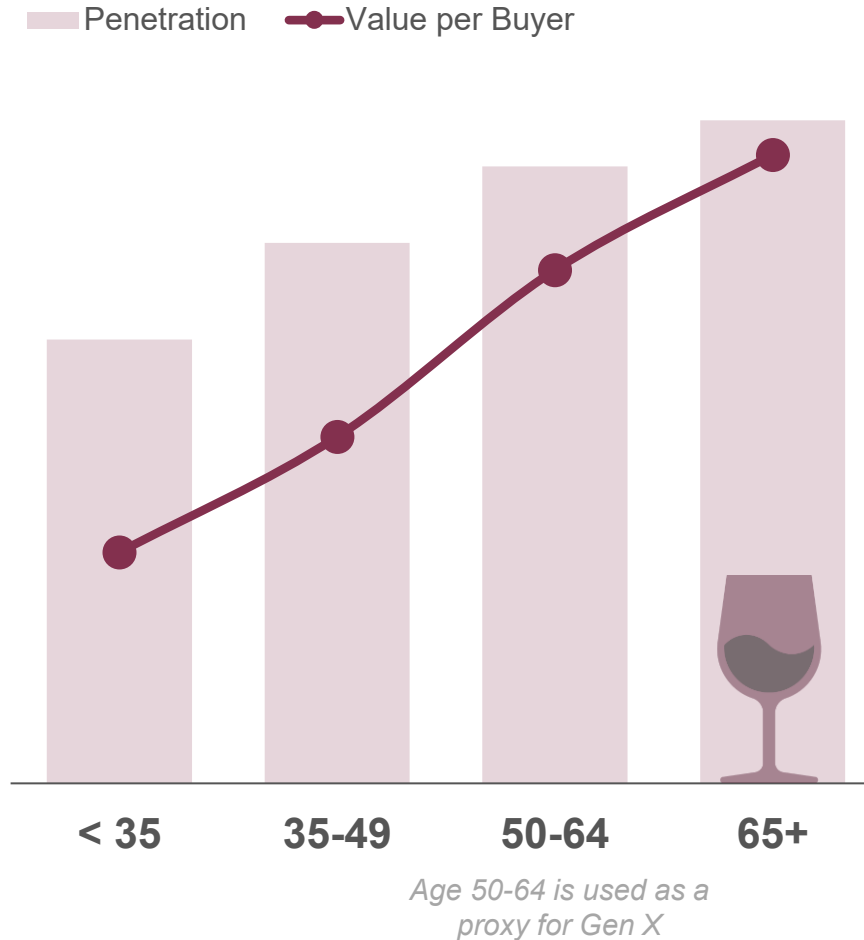


Source: NielsenIQ On Premise Global Reach 2025 [20143]; sample size 33,186 total; 8,802 Gen X globally

Wine category engagement and spending rise with age

Gen X show high penetration and high spend, so the opportunity is to defend and expand occasions

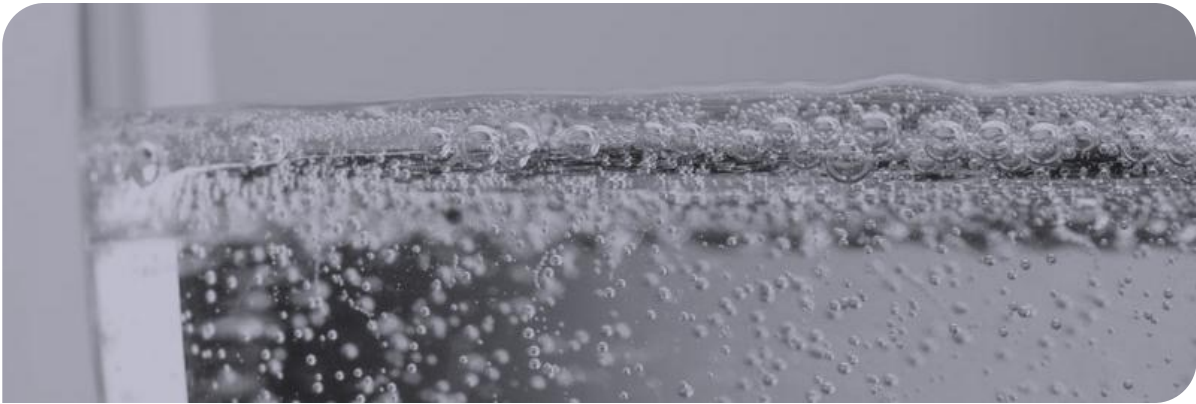
Wine Spending & Penetration by Age in Europe



Source: NielsenIQ ITL CPS Multi Country OnDemand Syndicated; 52 weeks ending 1/24/2026

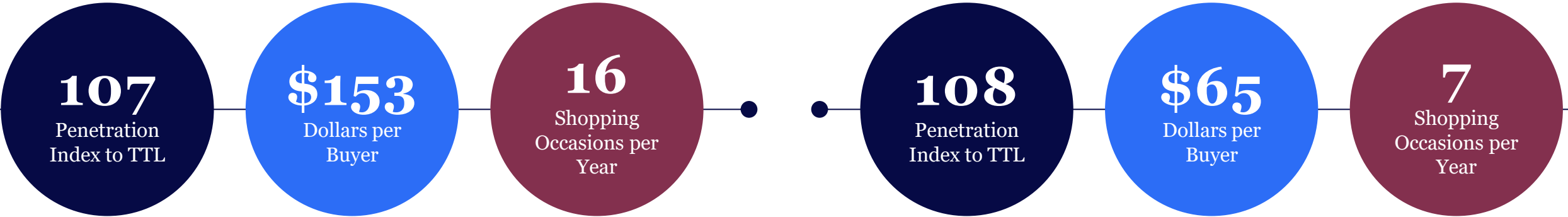
Gen X purchases Still Wine more often, while Sparkling is the lever for celebratory moments

Still vs Sparkling Wine – For Ages 50-64
Off Premise in Europe



Still/Table Wine

Sparkling Wine



Source: NielsenIQ ITL CPS Multi Country OnDemand Syndicated; 52 weeks ending 1/24/2026

Gen X behavior is reliable, not flashy

Gen X has a classic repertoire

When Gen X trades away from their usual, they often trade to Wine

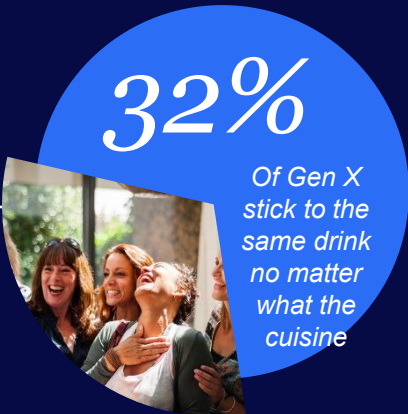
- *Wine is a safe choice and a natural swap for Gen X*

Value = Quality of craftsmanship + ingredients that justify the price

Gen X likes to treat themselves with going out and travel

Wine is #1

drink category that Gen X consumers are most likely to pay extra for a better quality drink when staying at a hotel



1 in 4

Gen X consumers will switch to Wine if they choose something other than their usual

% of Gen X consumers define 'Value for Money' as the quality of ingredients for a luxury drink

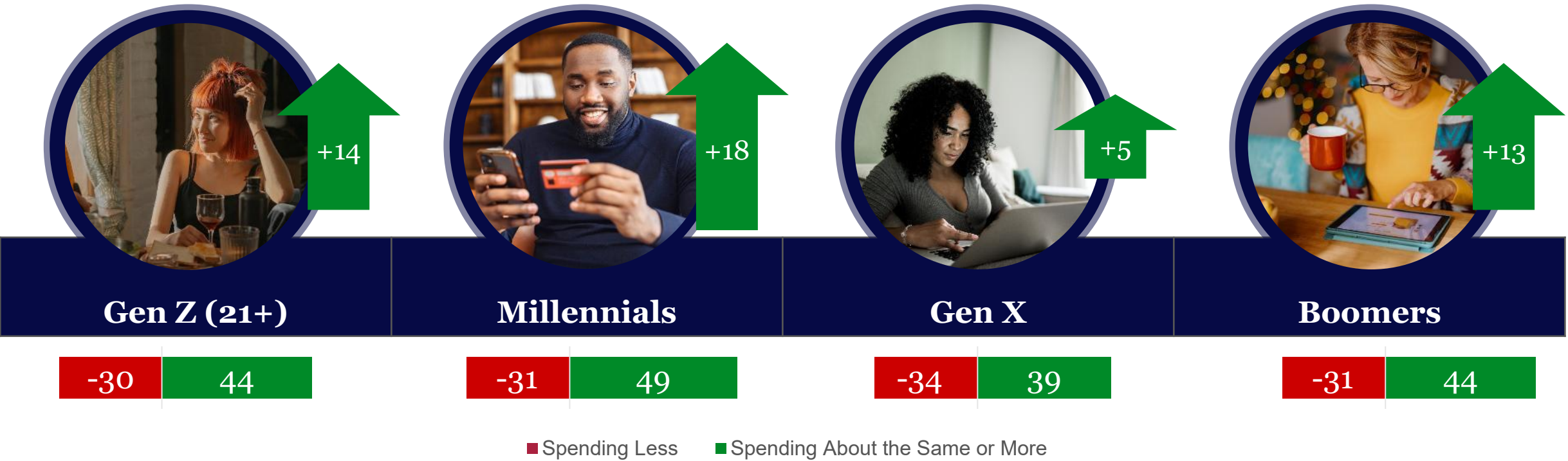
40%



Source: NielsenIQ On Premise Global Reach 2025 [20143], sample size 33,186 total, 8,802 Gen X globally; NielsenIQ On Premise Hotels 2025 [20087], sample size 4,022 total, 1,097 Gen X globally

44% of Global consumers plan to spend the same or more on Alcohol in the coming year, reflecting a moderation and intentionality

Spending Intention in next 12 months: Alcoholic Beverages
Spend Less vs. Spend About the Same or More



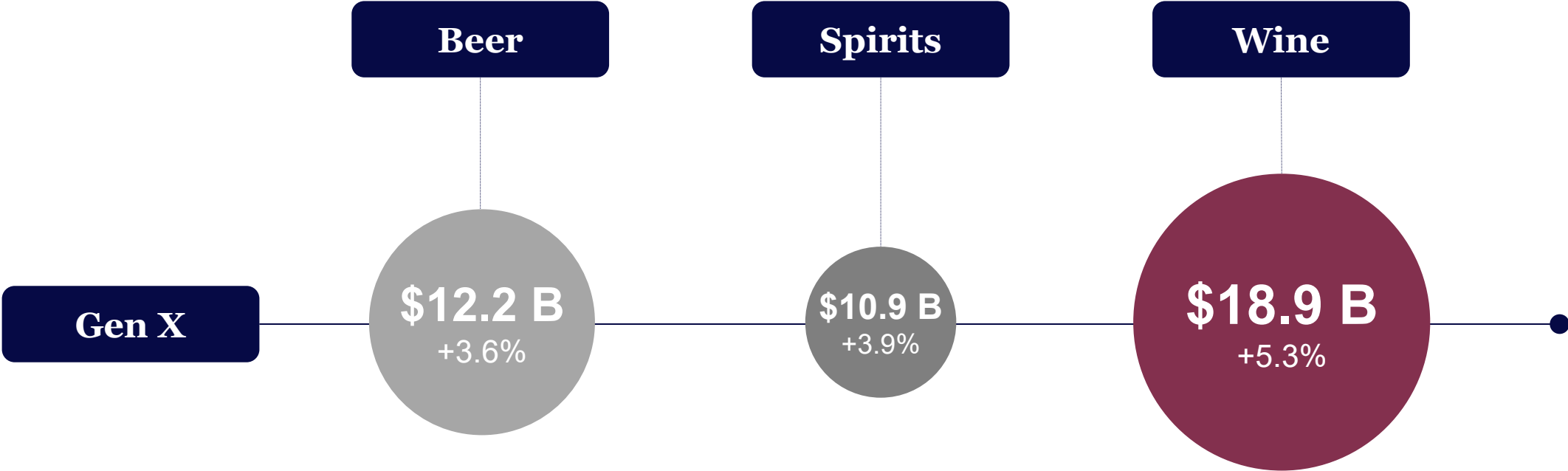
Consumer sentiment reflects **intention**, but in an inflationary environment, the **say-do gap** may paint different realities. With 63% of the most financially secure consumers planning to **maintain or increase** their spending in the next 12 months, it is the **less affluent** consumers in these generations who face the greatest risk of being left behind by the alcohol industry.

Source: NIQ Global (27 countries) Mid Year Consumer Outlook 2025 - Q4B. Thinking about grocery and household items in particular, How will you manage your spending in the next 12 months?

The *Gen X* Alcohol market will grow to 1.2x its current size in the next five years

APAC and Europe will generate over half the Alcohol growth for Gen Xers in the next five years

Global Gen X Alcohol Categories Spending Growth
Categories growth and CAGR: 2025-2035; Nominal USD



Source: NielsenIQ x World Data Lab, *The X Factor Report 2025*

How to win Gen X: *5 moves that travel across markets*

Value-plus Cues

—

Gen X will pay when it's worth it—make quality legible (varietal clarity, region cues, taste notes)

Simplify Choice

—

Gen X consumers reward clarity and control—simplicity is increasingly ‘premium.’

Occasion Bundles

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Build around ‘Tuesday meal,’ ‘weekend hosting,’ ‘celebration’—not around product specs

Trust Signals

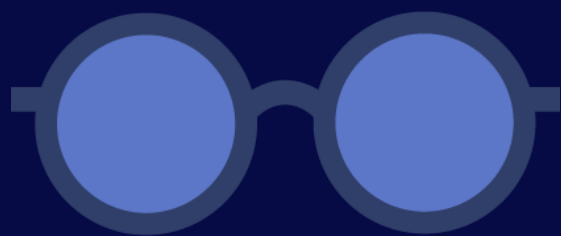
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Trust is built on quality/consistency and in some cases, ‘made in my home country’

Right Channel Roles

—

Use retail for repeat + exploration-with-guardrails; use on-prem to attach wine to food and experience



It's time to notice Gen X

3 Takeaways

Notice the Wallet

Gen X is the wallet
you can't afford to
ignore

Notice the Wine

Gen X is a core wine
buyer—protect the
base and grow
occasions, not just
awareness

Notice the Win

Winning Gen X is
simple: value-plus,
low friction, and
trust cues—
delivered



Thank you!

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Scan the QR Code!
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Contact me!
Kaleigh Theriault
Kaleigh.Theriault@nielseniq.com