Wine Category On-Premise Research Report

Wine Australia

Data Collected
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SQUARE HOLES

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Background

The domestic market is the biggest market for Australian wine with about a 40 per cent share of total Australian wine sales. Some sources indicate that wine consumption is declining significantly in the Australian on-premise channel. Furthermore, motivations for visiting the on-premise, especially among younger consumers, appear to be changing toward experiences beyond food and wine and wine is the least preferred alcoholic beverage in the on-premise

To be in a better position to respond to these trends, Australian grape growers and wine producers need access to relevant data and in sights on the on-premise channel.

Square Holes was commissioned to conduct research on behalf of Wine Australia to help provide insights and data to help offer clarity into the trends and cultural changes that have led to the current state of play in the Australian on-premise market.

Mission

Understand wine and Australian wine's profile in the on-premise channel in Australia, delving into the trends and cultural changes that have led to the current state of play

Research objectives

1. How are consumer habits towards alcohol and on-premise consumption changing?
2. Why do consumers drink wine in the on-premise channel and how does this differ by demographic and sub-channel?
3. What are the barriers to drinking wine in the on-premise channel? Does this differ sub-channel, occasion and demographic?
4. Where are they buying their wine in the on-premise channel? How do they make purchase decisions and who has the greatest influence on those decisions? Does this change by purchase channel, age or engagement level?
5. What attributes are most important and do these changes according to channel or consumer segment?

Executive summary

Research overview

Objectives

Some sources indicate that wine consumption is declining significantly in the Australian on-premise channel. In response, Wine Australia commissioned research to collect data to better understand the evolving role of wine in this channel. The study set out to explore consumption behaviours, on-premise motivations, consumption barriers, decision drivers and attribute preferences across demographics, sub-channels and occasions. The aim being to equip Australian wine producers with actionable insights to remain relevant and competitive in a changing cultural and commercial landscape.

Approach

To achieve this, a robust mixed-methods research design was utilised. This involved 15 in-depth interviews with industry stakeholders (venues, wineries and distributors), four consumer focus and affinity groups targeting on-premise visitors and wine drinkers aged 18 - 49, and an online survey of 815 wine consumers (of varying consumption engagement) across Adelaide, Melbourne, Sydney and Brisbane. Ethnographic observations both at on-premise venues and online added further real-world context to validate and deepen understanding of behaviour patterns and decision-making cues.

Key insights

The findings highlighted a cultural shift in behaviours. Alcohol consumption is becoming more intentional, with wine most aligned with food centric or special social occasions. Younger consumers in particular are value-driven, cautious and drawn to experiences that feel purposeful. Barriers such as price sensitivity, complex wine lists and limited staff support are all deterring engagement with wine on-premise, especially in casual or high tempo venues where cocktails and RTDs often dominate. While wine remains a strong option in formal settings and curated venues, its relevance diminishes in pubs, cafes and nightclubs where the social signals and overall experience are less aligned. Key decision drivers to wine selection on-premise often revolves around price, familiarity, brand trust and setting cues, with preferences diverging significantly between confident and occasional drinkers.

Key recommendations

To respond to these dynamics, the research outlines five strategic recommendations:

1. Simplifying wine experiences and improving staff confidence to overcome capability gaps
2. Adapting wine formats and activating at point of sale to better fit casual and diverse contexts
3. Boosting consumer motivation through value-driven, taste and storytelling-led approaches
4. Tailoring strategies by winery size and venue type
5. Repositioning wine as a flexible, everyday / all occasion option

Collectively, these recommendations aim to provide greater relevance to wine in the Australian on-premise market by aligning with evolving consumer expectations, experiences and values.

Summary of research findings

Alcohol consumption is becoming more mindful and value-driven, with fewer on-premise visits and a preference for purposeful social settings. While wine remains a staple, it's challenged by appealing alternatives and shifting cultural norms

1 Consumption behaviours

Consumers drink wine on-premise primarily when it aligns with food-focused occasions in curated venues like restaurants and wine bars, with older demographics defaulting to wine more consistently, younger cohorts are more influenced by setting, price and social context

2 On-premise motivations

Economic pressures and fear of making the wrong decision (particularly with cost-of-living increases) makes selecting a wine a higher risk proposition. Additionally, **limited wine knowledge, complex menus and a lack of staff guidance can make it a harder choice.** Consumers may opt for simpler, more approachable options that feel easier to navigate

3 Consumption barriers

Consumers make cautious, value-driven decisions based on familiar drinks and setting cues, with influence strongest when wine is confidently recommended by staff or meaningfully integrated into the venue experience

4 Decision drivers

Familiarity, value and grape variety are the most important wine attributes overall, though preferences shift by segment - with older and frequent drinkers prioritising origin and quality, while younger or less confident consumers rely more on branding, menu cues and support tools

5 Attribute priorities

Cultural shifts in alcohol consumption (shrinking market) and the impact for on-premise

Broader context		Influence on-premise
Cost of living pressures – A major factor is the experience of rising everyday costs and subsequent sensitivity around non-necessities such as entertainment. People are thought to be going out less often and are more mindful about how and when they spend their money, particularly when discussing hospitality and alcohol consumption	→	**Reduced on-premise visitation** – People are going out less frequently, reserving outings for special occasions or opting to socialise at home, where alcohol (particularly wine) is more affordable. This shift is suggested to have led to a decline in casual or habitual on-premise drinking. The cost of a night out is not just the alcohol (e.g., food, ubers, parking) but everything around it **Heightened value sensitivity when comparing options** – People are becoming more value conscious, with some (mainly younger people) thought to be calculating the alcohol content per dollar spent; cocktails may offer more perceived value when priced similarly to wine. Ordering wine by the glass rather than committing to a bottle is more common, whilst some may limit alcohol intake to prioritise food or manage costs
Health, wellness and mindful drinking – A consistent thread across the research being the assumption of an increased emphasis around wellbeing and health across society and how this influences decision-making around alcohol, particularly for younger age groups (although this was felt to across all demographics)	→	**Moderation and consumption consciousness** – Some are drinking less overall, often driven by a desire for better health, to avoid negative side effects, maintain control and feel good the next day. Sober curiosity and a more intentional approach to drinking is increasingly shaping behaviours when on-premise **Alcohol no longer central to socialising** – Socialising is no longer synonymous with alcohol (particular amongst younger age cohorts), with many being content to avoid alcohol all together on occasions
Experience seeking over just drinking occasions – Customers are prioritising experiences over simple consumption. Going out is seen as an opportunity to create memorable, sensory-rich and socially shareable experiences. The setting, aesthetics and 'moment' matter as much as the drink itself	→	**Influence of sensory and social appeal** – Cocktails and drinks with visual or storytelling appeal may be favoured over more traditional offerings in the right context **Presentation, uniqueness and alignment with the venue experience greatly influence selection** – People look for something they can't easily recreate at home
Increasing competition in beverage selection – The drinks landscape has exploded with products and innovation—craft beer, spirits, cocktails, seltzers and non-alcoholic options are all competing for share of attention	→	**Consumers are more adventurous** – People are open to trying and exploring across alcohol categories. Selection is heavily influenced by venue, occasion, mood and promotional cues **Appealing to customer taste profiles and interest is critical** – With heightened expectations and greater choice, drinks that resonate with personal tastes and current trends are more likely to be chosen
Corporate spend has decreased significantly – Corporate entertaining (e.g., long lunches and client functions) is thought to have declined post-COVID, driven by hybrid work, budget tightening and changing workplace cultures	→	**Less volume in corporate engagement** - Corporate events involving alcohol are becoming less common and more restrained **Growth in non-alcohol led events** – The frequency of work events where alcohol is not served or not central is increasing, promoting inclusivity over the 'traditional' workplace drinking culture

On-premise venues association with wine

	Wine bar	● ● ● ● ● Extremely strong association with wine	**Wine is the core offering and central to the venue's identity**. Staff are often trained, the list is curated and customers arrive expecting to explore and enjoy wine. High levels of capability, opportunity and motivation align here
	Restaurant (formal dining)	● ● ● ● ● Extremely strong association with wine	**Wine is a traditional and expected part of the dining experience**. Customers may be more open to bottle purchases and pairing wine with courses. Price sensitivity is lower and there's usually access to trained sommeliers or staff to help guide customers through often complex wine menu navigation
	Restaurant (casual dining)	● ● ● ● Strong association with wine	**Wine is still a common part of the dining occasion, but selections skew toward by-the-glass and familiar brands and varieties**. Consumers may be more price-sensitive and less confident, so simplicity and visibility / promotion matter more in these types of venues
	Pub	● ● ● Moderate association with wine	**Wine is often not promoted well in pubs, where beer dominates and there is increasing competition from tap cocktails and spritzers**. There is still an appetite for wine in these settings, however consumers may expect poorer quality wines or limited selection, whilst staff often lack confidence or training to recommend wine. This results in lower capability and lower motivation for wine choices compared to other settings, unless promotions or other social cues are present
	Café	● ● Weak association with wine	**Wine is not a core part of the occasion**; cafés are more associated with coffee, brunch and daytime socialising. Some do serve wine, but it's typically a side offering with limited selection or visibility
	Nightclub	● Very weak association with wine	**Wine has very little relevance in high-energy, late-night environments**. Spirits, cocktails and RTDs dominate due to faster service, higher ABV per serve and social signaling. Wine generally lacks the format, image and pacing suited to the nightclub setting

Key motivations and barriers to on-premise wine consumption

Motivations
Food pairing and restaurant settings
Occasions suited for consumption (e.g., celebrations, family gatherings)
Menu guidance and staff recommendations
Social trends increasing exposure and comfort with wine (e.g., the rise of bottomless brunches, wine bars and winery tastings / experiences)
Social influence, recommendation and brand familiarity on wine lists

Barriers
High price (in comparison to 'better value' alternatives) and increased sensitivity of mark-ups over other beverages
Lack of guidance and accessibility (particularly when brand listings are unfamiliar) increases risk proposition
Limited social cues and promotion / activations in more casual settings (such as pubs) reduces motivation and 'push' to purchase
Cocktails, spirits and beer often more suited to younger peoples tastes and more frequented on-premise venues (e.g., pubs)

Many consumers described shifts in alcohol consumption not as conscious decisions, but as a natural progression tied to lifestage. As people move from early adulthood into more structured points in their lives, their drinking naturally evolves - from volume to enjoyment, from impulse to occasion. Wine often becoming more relevant with age

Partiers (Age: 18 – 21)	Experimenters (Age: 22 – 25)	Elevators (Age: 26 – 29)	Enthusiasts (Age: 30 – 39)	Indulgers (Age: 40 – 59)	Moderators (Age: 60+)
Drinking for effect, excitement and inclusion. Alcohol = access to adulthood. Pre-drinking and party occasions dominate	Building identity, trying new things, social drinking remains central. Exposure to broader categories and wine	More selective. Excessive drinking slows down. Focus on enjoyment, food and control. Alcohol fits around lifestyle, not the other way around	More structured routines, rising disposable income, entertaining at home, pairing drinks with meals. Seeking quality	Alcohol is about rewarding quality time, connection and self. May spend more but drink less	Drinking on-premise less frequently, more conscious of age and health. Set habits, rituals. Still value indulgence in social settings
Wine can be seen as inaccessible (e.g., expensive, complex, limited taste appeal) and not suited to common on-premise drinking behaviours (e.g., slow consumption)	Wine is introduced through increased exposure and trusted influencers such as family and work colleagues. 'Beginner-friendly' styles such as sweet lower ABV wines appeal	Wine gains credibility as social, food-friendly and flexible. Lighter styles, by-the-glass, wine with dinner	Wine becomes more of a go-to. Exploration of varieties, regions and brands. More confident purchases and regular on-premise wine drinking	Wine preferences become entrenched. Will pay for quality, value storytelling and service	Greater tendency to stick with trusted wine varieties and brands

Note: The age brackets and lifestage labels presented in this table have been developed based on recurring themes identified through the online survey, consumer group discussions, and expert interviews. They are not rigid demographic categories, but rather illustrative groupings that reflect typical patterns in alcohol consumption and attitudes toward wine across different stages of adult life. The intention is to provide a simplified view of how wine engagement evolves over time

Increasing wine consumption in the on-premise involves addressing key barriers head on…

Target behaviour: Increase engagement with and purchase of wine in on-premise venues

Capability: Do consumers have the knowledge and skills required to confidently engage with wine on-premise?

Barriers

- Limited wine knowledge among younger and more infrequent drinkers creates uncertainty - many struggle to interpret complex wine lists
- Confidence gaps are particularly strong in more casual venues, where staff support is minimal and there are a lack of cues to guide selection
- Some consumers rely on default behaviours (e.g. choosing the second-cheapest wine) due to lack of capability rather than preference

Actions

- Simplified wine list architecture - use of flavour descriptors and cues instead of technical wine terms
- Staff cheat sheets and accessible training opportunities
- Small-format tastings or flights to build confidence and reduce decision pressure

Opportunity: Do the environment and social context enable or prompt wine consumption?

Barriers

- Wine is less relevant (and less promoted) in pubs and fast-paced environments, but more accepted in food-led, sit-down, or premium experiences
- Wine lacks sensory cues or rituals that can make it feel exciting (e.g., compared to the theatre and shareability of cocktails)

Actions

- Offer smaller, single-serve formats such as cans or wine on tap which are more suited to higher tempo venues
- Introduce activation tools at point of sale such as tent cards, table talkers or meal pairings and other venue promotions (e.g., special wine nights)
- Promote wine rituals / experience around serving and consumption beyond the traditional offerings

Motivation: Do people want to drink wine in this setting—and are they prompted to do so, both consciously and subconsciously?

Barriers

- High price points and a heightened awareness of steep mark ups around wine specifically creates a value perception gap (i.e., comparison to retail wine prices is easier for consumers than it is for cocktails or beer - which are less directly comparable. The experience around wine often feels minimal compared to the ceremony involved with cocktails or beer, and wine is often seen as offering lower alcohol per serving than cocktails. All these factors contribute to greater sensitivity to markup for wine compared to other beverage types)
- Growing health and moderation trends shift preference
- Increase in at-home socialising and wine consumption over more frequent / habitual on-premise visitation

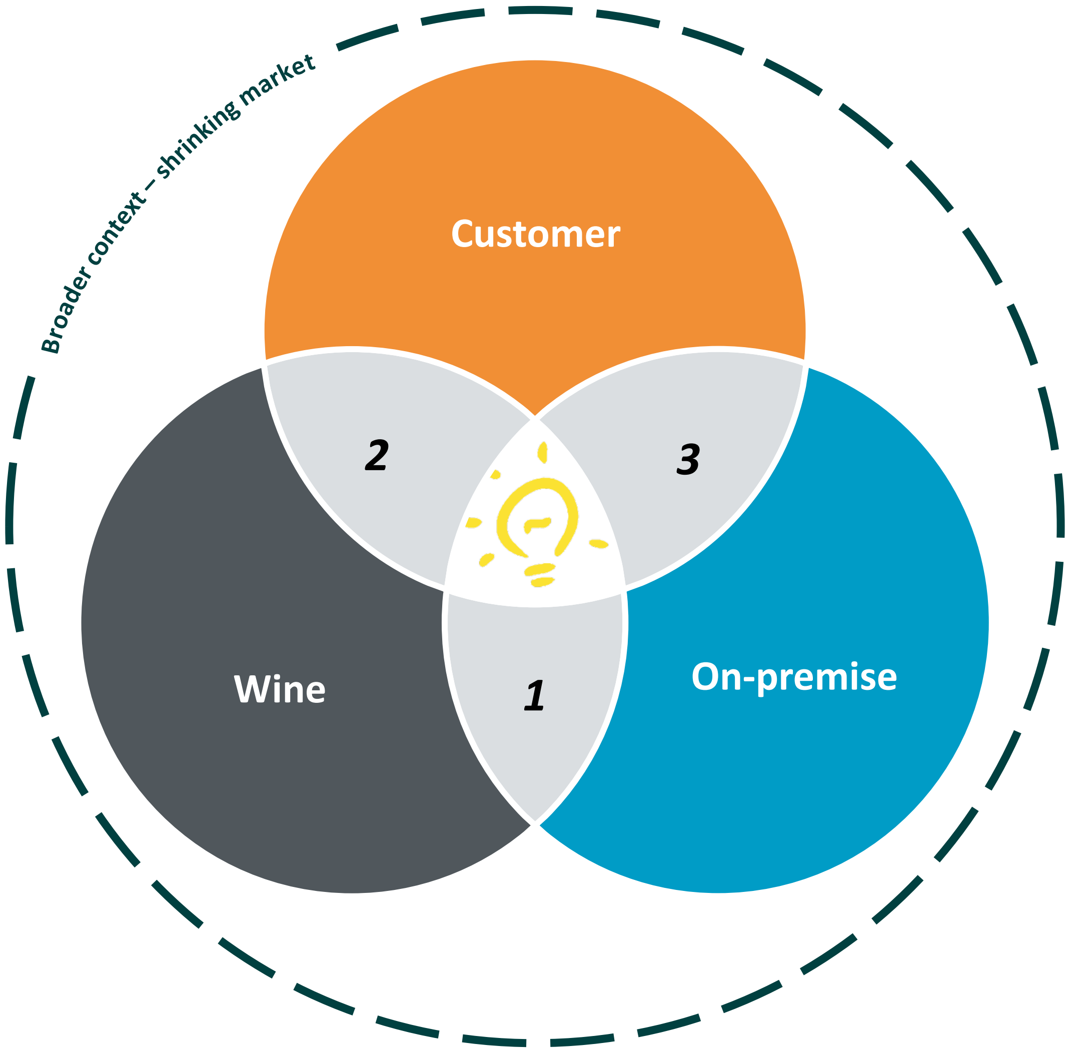
Actions

- Focus on by-the-glass options and consider value-led bundles (e.g., food and wine pairing specials)
- Invest in product innovation with lighter and chilled wines, spritzers and alternate flavour profiles to meet changing consumer needs / tastes
- Balance the importance of brand familiarity with venue collaboration for exclusive wine offerings (or experiences) to create something unique

Strategic recommendations to improve wine in the on-premise

Make wine more casual and social – integrate into everyday venues and occasions and normalise trials Position wine as something easy and enjoyable, not just for formal meals. Consider non-traditional formats to help wine feel more relaxed and group-friendly, whilst exploration can help lower the barrier to trial – making wine feel less risky (particularly for consumers who are still learning their preference)	• Promote spritzers, flavoured wines, chilled reds and lighter styles through campaigns and opportunity for tastings • Encourage innovation in small formats (e.g. cans, 200ml bottles, on-tap) • Pilot trendy alternatives like Lemon Infused Prosecco in partnership with venues
Simplify the wine experience at point of sale Simplify how wine is described. Focus on taste profiles and food pairings, lessen the reliance on regions or varietals. Clear, relatable language makes wine feel approachable to younger consumers in the absence of trusted or knowledgeable influencers	• Develop flavour-based wine list templates and effective staff training tools • Replace technical jargon with flavour-focused descriptors • Provide venues with cheat sheets, table talkers and QR-accessible wine guides
Generate tailored commercial solutions For wine to succeed on-premise, it must be as simple to serve and sell as its competitors. Collaborative product development, informed by venue needs, can position wine as a more strategic and sustainable part of the beverage mix	• Help producers create venue-specific exclusive wine brands (e.g., value for patron and profit for the venue) • Co-design programs aligned with current demand • Support product innovations to fit changing consumer trends
Train staff to make wine simple and inviting Frontline staff are key to improve wine sales. Give them tools to confidently recommend wines in plain, relatable terms and connect them to menu items. Customers would feel more engaged with confident and clear recommendation	• Offer reward-based venue training modules • Provide training kits to help venue groups train their own staff • Training is offered by some distribution groups, wine brands, but there is a general lack of consistent industry wide training (spirits are viewed as doing this well, especially in pubs to empower staff)
Tell better stories behind the wine – connect through place and story Younger drinkers are drawn to storytelling about the winemaker, the region, or sustainability. Promote wine through purpose-led messaging that feels modern and authentic, especially on social media or menus	• Consider growth in suburban, regional and food-led venues • Use storytelling tools like pairing maps, origin cards and QR codes • Launch social campaigns with short content and diverse voices

Unlocking growth in a shrinking on-premise wine market



Australia's on-premise wine market is under pressure - driven by falling consumption, rising costs and growing competition from cocktails, RTDs, beer and other (non-alcohol) options.

The solution ( ) lies at the intersection of wine brands / distributors, on-premise venues and customers. Wine thrives when it delivers: value to the customer, commercial return for the venue and long-term brand equity for producers.

It's about mutual value creation - not just selling wine but fitting wine seamlessly into evolving consumption habits and cultural expectations. This is as simple as 1, 2 and 3 …

1. **Commercial partnership:** Trade terms, distributor relationships and venue alignment determine whether wine earns and sustains a spot on the list

2. **Wine as the on-premise default:** On-premise is where wine brands are built (this is how consumers are introduced to new or reminded of established brands) - but the battleground is getting crowded. Compelling alternatives (cocktails, RTDs, imports) are winning share. Wine must assert relevance through positioning, familiarity and thoughtful presence

3. **Value-driven experience:** Customers will pay for wine - but only if it feels worth it. That means affordable options or elevated experiences. Simplicity, flexibility and staff support are key to unlocking trial and loyalty, as are a solid wine selection (value to premium, by the glass and bottles), menus and otherwise – does the cost equal the experience

Winery size priorities

Small winery	Medium-sized winery	Larger winery / group
Observation Likely to be under the most pressure and risk increasing challenges in competing with medium to large wineries. May have challenges offering attractive economies of scale commercial terms to venue groups. **Recommendation** Focus on authenticity and direct venue relationships. Success comes from visibility, agility and story-led engagement. **Priorities** • Target independent or suburban venues • Build personal connections • Offer exclusive formats or support • Use storytelling and in-person engagement	**Observation** Work closely with distributors and may leverage their training and other programs. Sales teams, targeting groups and key segments or geographic areas. **Recommendation** Need to be selective and strategic, e.g. venue segment, geographic region or group. Align portfolios and formats with the right venues and drinker needs. **Priorities** • Tailor offers by venue type and channel • Understand venue and customer needs • Align messaging to consumer demand • New product innovation	**Observation** Generally, highly proactive in working with venue groups and key segments, including their own data analytics, research and programs. Sales teams are well developed and proactive. **Recommendation** Leverage scale with relevance. Support venues with training, clarity and commercially viable offerings. **Priorities** • Provide venue-friendly lists and support tools • Invest in training and activation • Streamline portfolios for clarity and margin • Take a holistic perspective for overall wine industry survival and growth in the domestic on-premise market

Research findings

1. CONSUMPTION BEHAVIOURS

How are consumer habits towards alcohol and on-premise consumption changing?

Consumption behaviours

1

Consumers are being more selective about on-premise outings. Home drinking is significantly more common than venue visitation. Rising living costs and lingering post-COVID habits have made social outings more intentional and less frequent.

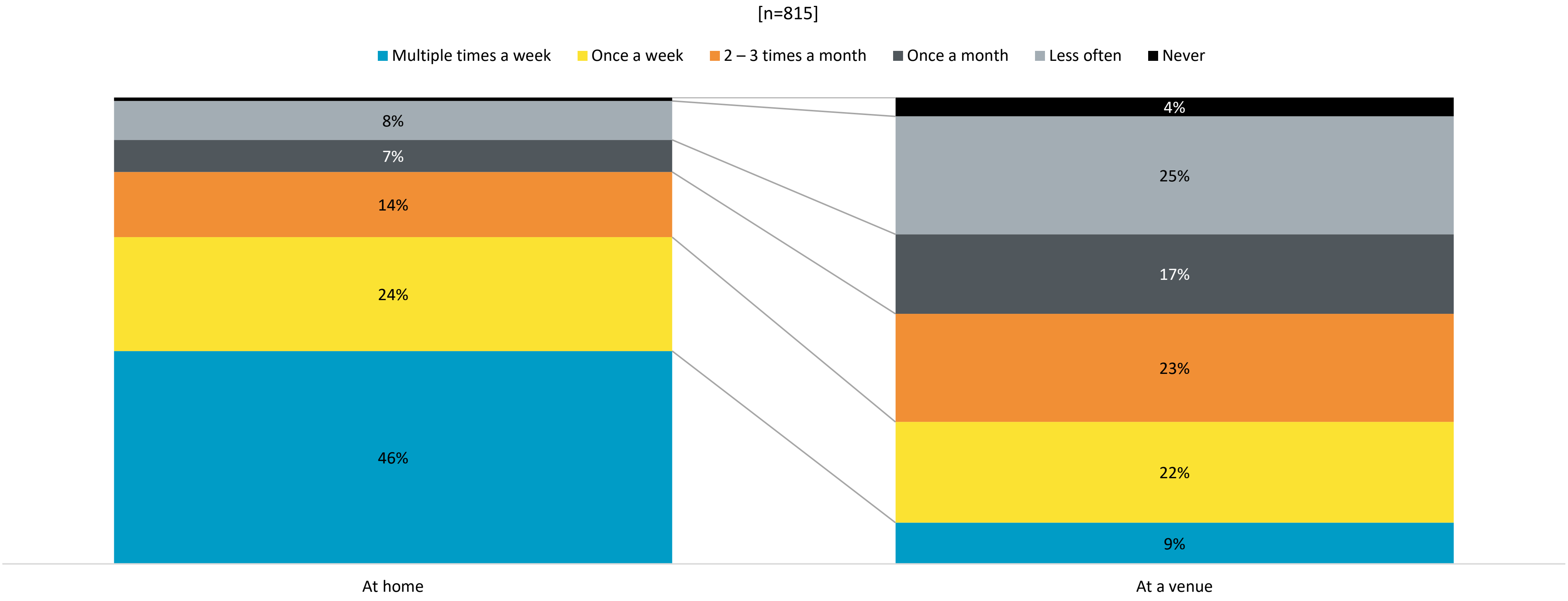
2

Overall alcohol consumption is steady; however, a significant proportion of consumers are noting a decrease in their alcohol intake and on-premise visitation. Cost-of-living pressures, health focus and more mindful drinking behaviours are driving this decline, reflecting a broader cultural shift toward moderation and conscious lifestyle choices.

3

On-premise preferences may be shifting toward casual, value-driven, and socially comfortable venues. Consumers are choosing pubs, wine bars and casual restaurants for their affordability and relaxed vibe, reserving fine dining for special occasions. Quality drinks like wine and cocktails are favoured in these settings, aligning with a desire for more curated, meaningful experiences.

Over half of the sample[1] (54%) consume alcohol on-premise at least a few times a month compared to 88% who would drink at home at the same frequency



[1] A breakdown of the sample / respondents can be found In Appendix 5 (Page 113)

6. How often would you consume alcohol… – Source: Square Holes 'On-Premise Research Online Survey' 2025

Over 70% of those aged 30+ consume alcohol at home at least once a week, whilst the incidence for 18 – 29-year-olds is 15 percentage points lower at 55%. However, younger age groups are amongst the most frequent on-premise alcohol consumers

At home

	Total	Male	Female	18 - 29	30 - 44	45 - 59	60+
Multiple times a week	46%	55%	39%	22%	43%	47%	51%
Once a week	24%	24%	25%	33%	29%	25%	19%
2 – 3 times a month	14%	10%	17%	18%	17%	12%	12%
Once a month	7%	5%	8%	14%	6%	6%	7%
Less often	8%	5%	11%	12%	4%	9%	11%
Never	1%	1%	1%	0%	1%	0%	1%
Column n	815	347	466	49	253	211	301

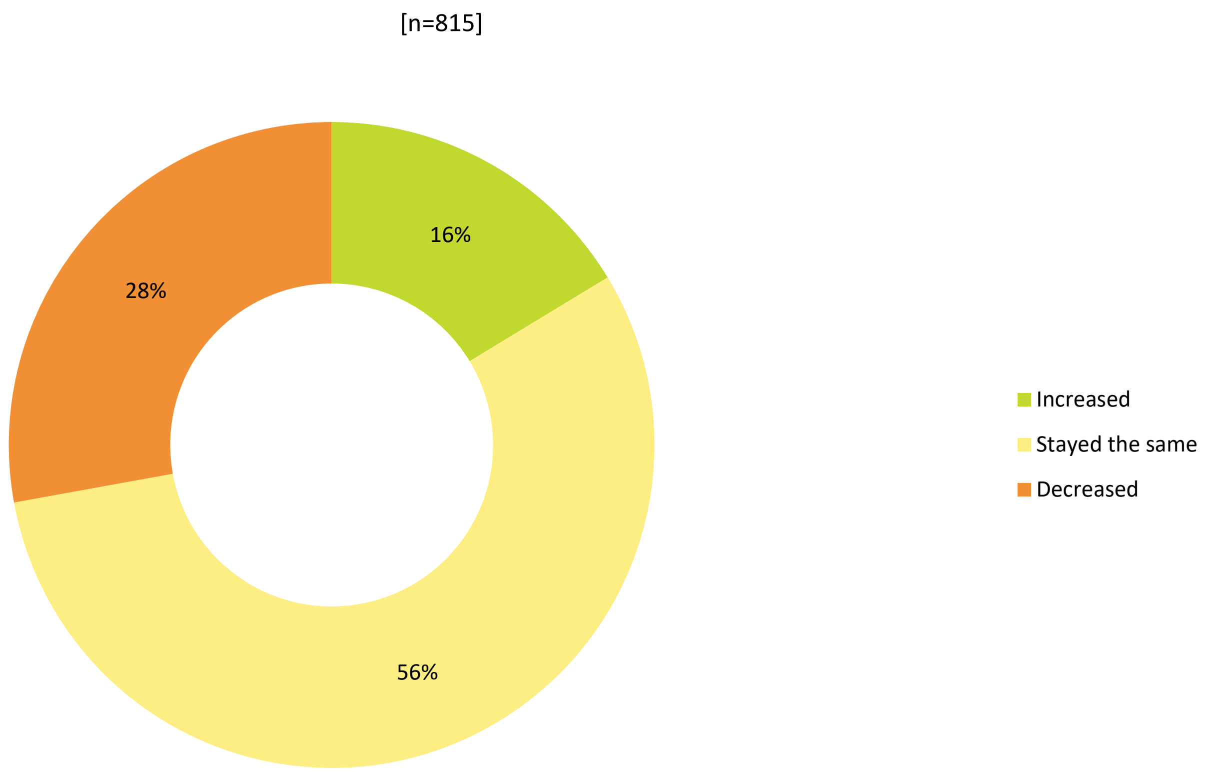
At a venue

	Total	Male	Female	18 - 29	30 - 44	45 - 59	60+
Multiple times a week	9%	13%	6%	14%	11%	7%	8%
Once a week	22%	23%	21%	18%	25%	19%	21%
2 – 3 times a month	23%	22%	24%	31%	30%	25%	15%
Once a month	17%	17%	17%	14%	14%	16%	21%
Less often	25%	20%	29%	20%	19%	27%	30%
Never	4%	4%	4%	2%	1%	6%	6%
Column n	815	347	466	49	253	211	301

Note: In this chart, green shades represent higher levels of response selection, while red shades indicate lower levels of response selection. The intensity of the colour reflects the frequency of selection

6. How often would you consume alcohol… – Source: Square Holes 'On-Premise Research Online Survey' 2025

Majority of respondents[1] note their alcohol consumption has remained the same compared to 3 years ago. Slightly more of the sample (28%) however indicate decreasing alcohol consumption compared to increasing (16%)

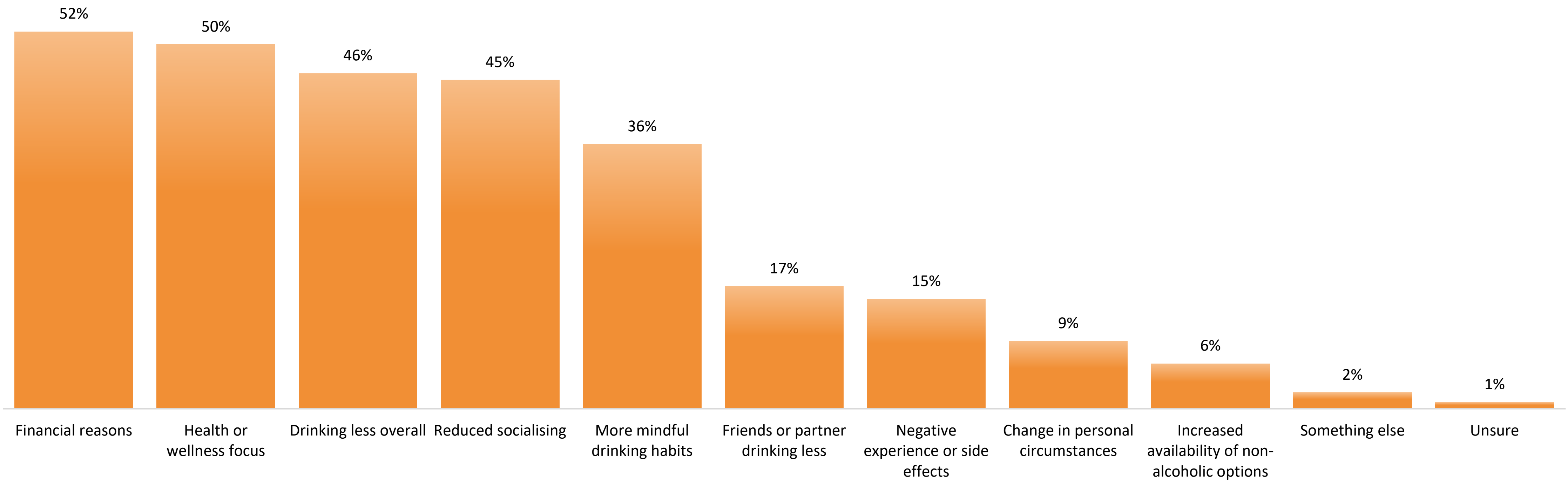


[1] A breakdown of the sample / respondents can be found In Appendix 5 (Page 113)

7. Would you say your consumption of alcohol has increased, decreased or remained the same compared to 3 years ago? – Source: Square Holes 'On-Premise Research Online Survey' 2025

Over half of those who recorded a decrease in alcohol consumption cite financial reasons and an increased focus on health and wellness as reasons for their decline

[of those who have decreased alcohol consumption, n=227]



9. Why has your alcohol consumption decreased compared to 3 years ago? – Source: Square Holes 'On-Premise Research Online Survey' 2025

“I think it's not as cool to be hungover anymore. **People are so aware of health and wellness.** It’s like [the stigma around] tanning, why are you doing that yourself?”

Affinity Group One, Female, Aged 18 – 29, Sydney

When assessing attitudes behind decreasing alcohol consumption by age, 18 – 29 year olds observe a far greater incidence of financial reasons and more mindful drinking habits compared to other age cohorts

Column %	Total	18 - 29	30 - 44	45 - 59	60+
Financial reasons – I'm cutting back due to cost of living or budgeting	52%	71%	53%	57%	44%
Health or wellness focus – I'm trying to live a healthier lifestyle	50%	57%	55%	47%	47%
Drinking less overall – My general interest in alcohol has decreased	46%	50%	45%	37%	52%
Reduced socialising – I'm going out less or attending fewer events	45%	21%	43%	42%	52%
More mindful drinking habits – I'm being more intentional about when and how much I drink	36%	71%	31%	27%	40%
Friends or partner drinking less – Social influence has shifted	17%	36%	29%	12%	9%
Negative experience or side effects – e g , hangovers, health scares	15%	43%	24%	13%	6%
Change in personal circumstances – e g , pregnancy, parenting, new job, etc	9%	7%	22%	7%	3%
Increased availability of non-alcoholic options – I prefer or switch to alcohol-free choices	6%	7%	5%	5%	7%
Something else	2%	0%	2%	2%	3%
Unsure	1%	0%	2%	2%	0%
Column n	227	14	58	60	95

Note: In this chart, green shades represent higher levels of response selection, while red shades indicate lower levels of response selection. The intensity of the colour reflects the frequency of selection

9. Why has your alcohol consumption decreased compared to 3 years ago? – Source: Square Holes 'On-Premise Research Online Survey' 2025

Detailed conversations with consumers confirmed much of the data present in survey findings… On-premise visits are influenced by social comfort and affordability, while changing habits - driven by life stage, cost pressures, and the pandemic - reflect a shift toward quality, intentionality, and moderation

Usual drink selection	Frequency and types of on-premise visitation	Changing habits
• Drink choice varied by setting, occasion, and company	• Preferred venues: local pubs, wine bars, breweries, casual restaurants	• Drinking habits matured / slowed with age
• Beer: common in pubs, casual outings (familiar, easy)	• Chosen for comfort, social vibe, affordability, space	• Younger years: high consumption, party focus
• Spirits/premixed: favoured in busy venues (quick, simple)	• Visit frequency: weekly to monthly	• Now: quality over quantity, relaxed venues preferred
• Wine: linked to restaurants, relaxed settings	• Fine dining rare, reserved for special occasions	• Preference for conversation, good food, slower pace
• Cocktails: similar use as wine, seen as an alternative	• Fine dining linked to wine, curated drinking experience	• Cost pressures: more pre-drinking, less going out
• Wine well-liked, especially by women and older participants		• COVID caused lasting behavioural shifts
• Environment strongly influenced wine selection		• Social outings now more intentional, spending more considered

The on-premise and broader alcohol landscape are undergoing significant cultural and behavioural change, and the opinion of many industry experts reflects the perceptions of the boarder population… Consumers are drinking less overall - driven by rising cost-of-living pressures, growing health consciousness and a desire for more purposeful and curated experiences

Wine's traditional role as the cornerstone of on-premise dining is being challenged by the rise of cocktails and other beverages that offer greater visual appeal, personalisation and perceived value. Consumers are also becoming more discerning - prioritising overall value and experience rather than price alone.

Despite market headwinds, many interviewees expressed optimism. Wine continues to resonate where it is thoughtfully curated, visually engaging and aligned with evolving consumer tastes - especially in experiential formats and food-led settings.

"**The reality is people are having a glass as opposed to ordering a bottle because it's expensive,** going out is a costly exercise these days."

Investor

"**A lack of innovation has been a challenge that the wine industry seen**. I think everyone will speak to the emergence of hybrid products or spritzers as being a success story, but that's really the tip of what has been long-term stagnation in the category… Other categories have been showing far more capability to tap into the consumer need, the consumer occasion and talking about consumers rather than talking about themselves."

Winery

2. ON-PREMISE MOTIVATIONS

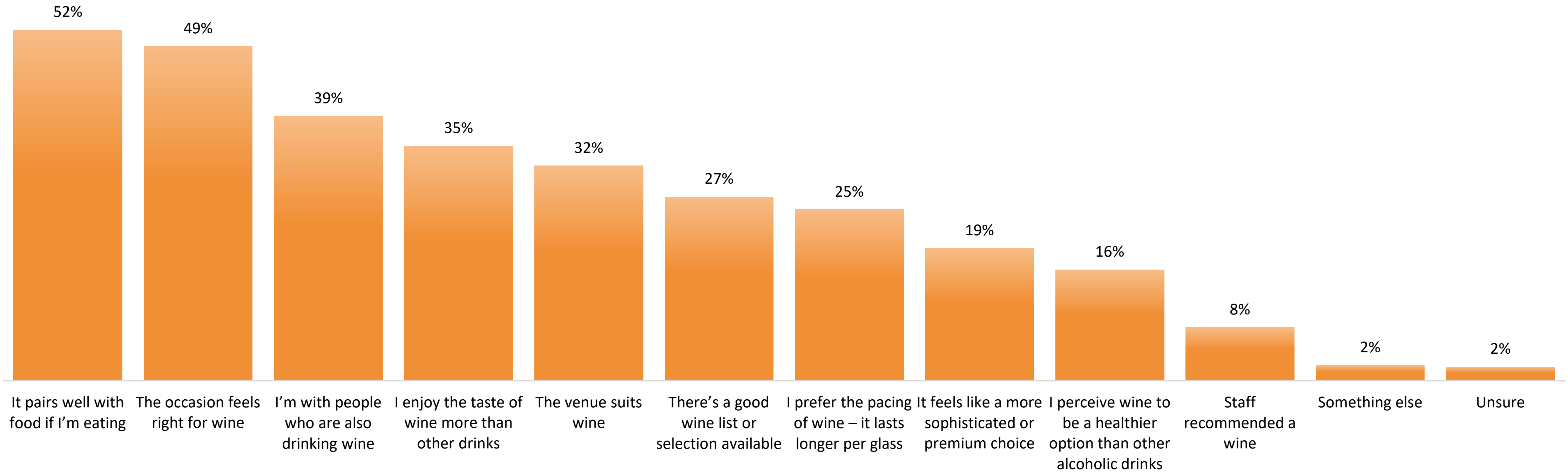
Why do consumers drink wine in the on-premise channel and how does this differ by demographic and sub-channel?

On-premise motivations

1	**Wine is strongly linked to settings where food is prevalent** (i.e., restaurants and dining out), **as well many special occasions** (such as events / functions and family gatherings). Whilst some indicated a default preference of wine regardless of scenario, consumption for the majority is heavily occasion and context-driven.
2	**Age significantly shapes wine engagement**, with older consumers defaulting to wine, while younger cohorts rely more on external cues. Consumers aged 60+ have the strongest wine connection, driven by taste, habit, and wine knowledge. In contrast, 18-29-year-olds often require guidance and are more influenced by venue type, social influence and pricing concerns.
3	**Sub-channel setting plays a critical role - wine feels most appropriate in restaurants and wine bars, less so in fast-paced or informal venues**. Millennials and older consumers associate wine with meals and curated settings, while younger drinkers avoid it in loud or busy environments (where they more often frequent), opting for simpler drinks. Wine is more likely chosen when it feels intentionally integrated into the overall venue experience.

The decision to purchase wine over other options is most dictated by food pairing and occasion, illustrating a strong wine / experience connection

[of those who purchase wine on-premise at least ‘rarely’, n=790]



19. What would you say are your biggest influences on the decision to order wine over other drink options when on-premise? – Source: Square Holes ‘On-Premise Research Online Survey’ 2025

A general enjoyment of wine over other drink types increases with age, whilst younger age cohorts (particularly 18 – 29-year-olds) show increased rationale for factors such as venue and perception of sophistication – indicating a lesser connection to wine as a default choice and increased influence of external cues to drive selection

Column %	Total	18 - 29	30 - 44	45 - 59	60+	Always	Often	Sometimes	Rarely
It pairs well with food if I'm eating	52%	48%	45%	49%	60%	48%	56%	53%	30%
The occasion feels right for wine	49%	58%	47%	47%	51%	38%	51%	53%	43%
I'm with people who are also drinking wine	39%	42%	38%	35%	42%	32%	42%	40%	33%
I enjoy the taste of wine more than other drinks	35%	23%	31%	31%	42%	65%	43%	18%	7%
The venue suits wine	32%	40%	38%	28%	28%	21%	35%	37%	13%
There's a good wine list or selection available	27%	23%	28%	29%	26%	24%	33%	24%	13%
I prefer the pacing of wine – it lasts longer per glass	25%	27%	24%	23%	27%	34%	31%	18%	9%
It feels like a more sophisticated or premium choice	19%	42%	29%	15%	11%	23%	18%	23%	9%
I perceive wine to be a healthier option than other alcoholic drinks	16%	19%	18%	13%	17%	33%	19%	10%	1%
Staff recommended a wine	8%	13%	14%	7%	3%	7%	9%	6%	9%
Something else	2%	2%	1%	2%	3%	3%	1%	2%	6%
Unsure	2%	0%	2%	1%	3%	0%	1%	3%	10%
Column n	790	48	249	203	289	111	341	271	67

Note: In this chart, green shades represent higher levels of response selection, while red shades indicate lower levels of response selection. The intensity of the colour reflects the frequency of selection

19. What would you say are your biggest influences on the decision to order wine over other drink options when on-premise? – Source: Square Holes 'On-Premise Research Online Survey' 2025

How are younger audiences (Gen Z) engaging with wine on-premise?

- Occasions
- Confidence
- Pricing
- Settings
- Influence

KEY TRENDS

Occasions: Wine is mainly associated with planned occasions like dining out or celebrations, where wine added a sense of occasion, but it was rarely a spontaneous choice

Confidence: Consumers can become overwhelmed by wine lists and are more likely to choose wine when menus included pairing cues or staff offered clear recommendations. Confidence is directly tied to risk mitigation, where risk can be reduced, increased consumption is likely to occur

Pricing: Many are concerned for on-premise mark-ups, often comparing prices to retail and only choosing wine when the experience or occasion justified the spend

Settings: In lively, informal venues, wine feels a little out of place. Consumers indicating preferring spirits, cocktails, or RTDs for their speed, simplicity and social ease, while wine was seen as harder to order and less suited to fast-paced, group settings

Influence: It is common for younger audiences to follow the lead of others in their group. If someone ordered a bottle, others would participate, but if not, they would go for simpler, individual drinks. They might avoid spirits around parents but choose wine for dates to feel more refined for example. The social environment often dictated whether wine became part of the occasion or not

"I go out dining once every two weeks. It used to be more, but now it's time constraints and finding nights that work with all your friends. **A lot of the time we're just going out with the purpose of catching up, we might not drink because we're driving or there's just no need to drink because it's a weeknight**. Unless we're at a fancier restaurant and they might have a good cocktail menu, then we might get one. But that's about it."

Focus Group One, Aged 18 – 29, Mixed States

How are millennials engaging with wine on-premise?

- Occasions
- Value
- Moderation
- Exploration
- Experience and influence

KEY TRENDS

Occasions: Strongly associate wine with meals, especially at restaurants or dinners with friends. It's seen as part of the experience, with the nature of wine feeling social and convenient – often the default choice when dining out or for celebrations such as weddings or birthday parties

Value: Many compared wine to cocktails or beer when deciding what to buy. If the wine menu is unclear or the options are unfamiliar, they are more likely to choose a cocktail, which feels like better value. Without clear guidance, many are hesitant to spend on wine

Moderation: It was agreed that drinking is now more selective and at a slower pace compared to when they were younger, saving for special or relaxed occasions

Exploration: Open to trying new wine styles, but only at places like wine bars or quality restaurants. Staff knowledge and curated lists make consumers more willing to explore wine varieties

Experience and influence: Wine is more appealing when it feels thoughtfully integrated into the overall experience. The venue’s vibe, service style and presentation all influence their choice. When wine feels intentional and well-suited to the setting, they are more likely to choose it

The connection to wine grows with age – barriers of relevance, competing preference and wine knowledge become less of a hinderance to selection

	18 - 29	30 - 44	45 - 59	60+
Engagement level	**Moderate** engagement with wine - seen as setting-specific, not the default choice but open to on-premise wine experiences	**Strong** engagement with wine - commonly chosen for dining and social occasions, though not an automatic choice. Open to discovery but expectations around quality and value	**Very strong** engagement with wine – preference for taste and alignment with frequent on-premise outings	**Extremely strong** engagement with wine – often the default based on taste and habit irrespective of venue or occasion
Drivers	✓ Food led experiences ✓ Social setting alignment and influence of others ✓ Promotions or activations around wine	✓ Food led experiences ✓ Venue credibility ✓ Social setting alignment and influence of others ✓ Promotions or activations around wine	✓ Taste preference and habit ✓ Food led experiences	✓ Enjoy the taste of wine more than other drinks ✓ Very comfortable in wine knowledge and selection choices (e.g., preferences by brand, variety or region) ✓ Food led experiences
Barriers	! Preference for other beverage options ! Price sensitivity ! Wine has less relevance in more frequented venues (such as clubs) and on-premise occasions (e.g., fun night out) ! Increasing consumption consciousness and on-premise occasions where alcohol is not part of the experience ! Wine list complexity - lower wine knowledge hinders desire to select in the absence of guidance or trusted knowledge source (e.g., staff)	! Price sensitivity ! Limited by-the-glass options ! Wine list complexity	! Price sensitivity ! Increasing habit of socialising at home with consumption of wine away from on-premise offering greater value, comfort and control	! Price and cost of living pressures reduces on-premise visitation ! Poor selection of wines and limited by-the-glass options ! Digital ordering solutions more likely than not to decrease wine selection

3. CONSUMPTION BARRIERS

What are the barriers to drinking wine in the on-premise channel?

Consumption barriers

1 **Perceived cost, complexity, and limited variety are leading deterrents**, with many consumers viewing wine as more expensive than other drinks, difficult to navigate due to unfamiliar or overwhelming wine lists and lacking sufficient by-the-glass or preferred style options.

2 **Younger consumers in particular face psychological and experiential barriers**, with preferences for simpler, more familiar drinks like cocktails or beer, driven by ease of ordering, lack of wine knowledge and environments where wine feels less appropriate or integrated.

3 **Ultimately, the barrier is execution, not interest**. Consumers still want wine, but staff discomfort, complex menus and poor presentation create friction. Simplified lists, basic training and clear storytelling are seen as low-effort, high-impact ways to convert interest into sales.

“**Everywhere wine is facing much stronger competition from other beverages**, particularly in the restaurant environment. The day where a restaurant was a wine-based experience is very much over now.”

On-premise venue

From an industry perspective, the barriers to wine in the on-premise are not rooted in a lack of interest - but in a gap between product and experience

Wine is still a core choice, but losing ground to simpler, more engaging alternatives. Modern consumers, especially younger ones, often find wine intimidating and inconsistent. Compared to cocktails, beer and RTDs - seen as more fun, visually appealing and easier to understand, wine is frequently overlooked as a first choice.

Staff confidence is a major barrier. Limited training and high turnover mean many frontline teams avoid recommending wine, fearing mistakes. In contrast, spirits brands actively invest in staff education, giving them an edge at the point of sale. Poor wine advice can and does impact future consumption.

Cost-of-living pressures mean consumers are scrutinising value, not just price. High mark-ups on wine lists can make wine feel poor value, especially compared to cocktails with perceived ‘theatre’. Rightly or wrongly, consumers often compare on-premise wine prices to retail benchmarks, reducing willingness to experiment.

In-venue activation and storytelling are an area for improvement. Even when good wine options are available, it often lacks compelling storytelling or clear promotion. Without point-of-sale materials, simple guidance, or by-the-glass visibility, wine can be overlooked

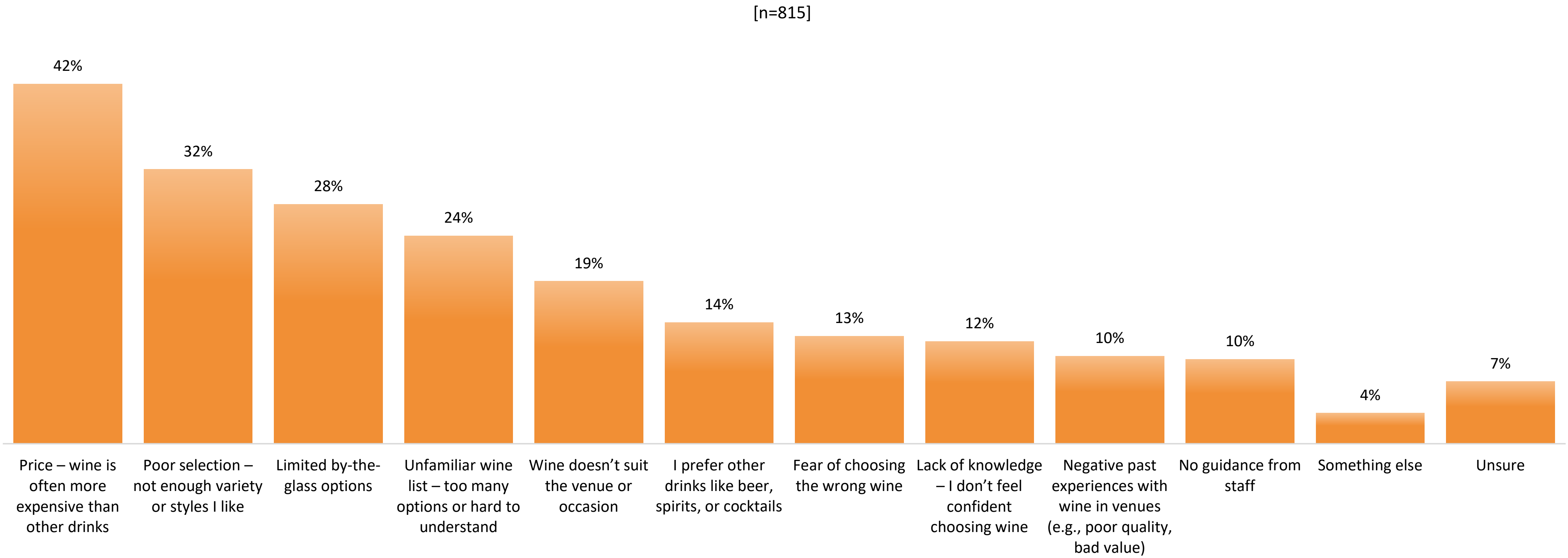
“If I go into a restaurant and I don’t know a lot and **I order a margarita, I know exactly what I'm going to get. You go into a restaurant, and you ask for a glass of Chardonnay, that glass of Chardonnay may turn up in 15 different ways** at anywhere from $15 a glass to $100 a glass.”

On-premise venue

“**Sometimes the bar staff can be so scared to recommend something. How do they know a sweet to a dry wine?** We made really simple interactive videos for a lot of our customers to use with their staff.”

Winery

Wine often being more expensive than other drinks is the biggest barrier to ordering wine on-premise. Whilst limited varieties and styles of wine as well as by-the-glass options also contributes to hindering selection



25. What are the biggest barriers to you ordering wine in on-premise venues? – Source: Square Holes 'On-Premise Research Online Survey' 2025

For 18 – 29-year old's a preference for other drinks such as beer, spirits, or cocktails is the greatest barrier to ordering wine when on premise

Column %	Total	18 - 29	30 - 44	45 - 59	60+	Always	Often	Sometimes	Rarely	Never
Price – wine is often more expensive than other drinks	42%	33%	38%	41%	47%	29%	43%	45%	49%	36%
Poor selection – not enough variety or styles I like	32%	33%	30%	28%	36%	36%	39%	28%	12%	12%
Limited by-the-glass options	28%	20%	28%	23%	32%	35%	29%	29%	13%	4%
Unfamiliar wine list – too many options or hard to understand	24%	22%	27%	23%	23%	16%	30%	24%	16%	4%
Wine doesn't suit the venue or occasion	19%	35%	20%	18%	16%	14%	18%	24%	19%	4%
I prefer other drinks like beer, spirits, or cocktails	14%	37%	17%	12%	9%	8%	7%	19%	31%	32%
Fear of choosing the wrong wine	13%	22%	19%	11%	7%	12%	14%	13%	7%	0%
Lack of knowledge – I don't feel confident choosing wine	12%	20%	16%	13%	6%	10%	11%	14%	13%	4%
Negative past experiences with wine in venues (e g , poor quality, bad value)	10%	12%	13%	9%	8%	14%	13%	6%	4%	4%
No guidance from staff	10%	14%	13%	10%	6%	9%	11%	9%	12%	4%
Something else	4%	0%	1%	3%	6%	5%	3%	1%	9%	20%
Unsure	7%	4%	5%	9%	9%	13%	5%	7%	9%	12%
Column n	815	49	253	211	301	111	341	271	67	25

Note: In this chart, green shades represent higher levels of response selection, while red shades indicate lower levels of response selection. The intensity of the colour reflects the frequency of selection

25. What are the biggest barriers to you ordering wine in on-premise venues? – Source: Square Holes 'On-Premise Research Online Survey' 2025

“The number one factor for influencing wine selection is the wine list. Think about the complexity of that versus a craft beer drinker or even with tap cocktails, pointing to the tap, I want a margarita, how simple that is versus I want a Barossa Shiraz 2013 from Sami-Odi kind of thing… It's not perceived as a pickup and play category. It’s [actually] quite simple to find out what you like, but the way it's been communicated and the way it's executed in market has been around the pedigree and the complexity and the elevation of the product over the other categories. It's almost premiumisation to the extent where it's not within the reach of the entry level consumer.”

Winery

What's driving or holding back wine in on-premise? A thematic view

	Occasion	On-premise trends	Demographics	Sub-channels	Influencers
Drivers	1. Food-led, purposeful outings drive premium wine choices 2. Weekend and celebration occasions remain strong anchors for wine consumption	1. By-the-glass offerings enable trial and accessibility 2. Lighter styles, spritzers and flavoured wines are gaining momentum	1. Millennials are seeking quality, lighter styles and occasion-driven wine 2. Spritzers and small formats serve as entry points for new wine drinkers	1. Suburban and mid-tier venues offer better wine turnover and value for some 2. Food-led pubs and hybrid formats align closely with wine occasions	1. Well-trained staff strongly influence wine sales through confident recommendations 2. Recognisable brands and accessible wine lists boost purchase comfort
Barriers	1. Fewer habitual drinking occasions post-COVID 2. Health and moderation trends are reducing frequency and volume	1. High mark-ups and complexity deter casual consumers 2. Cocktails and spirits dominate first-choice occasions due to experience and ease	1. Gen Z drinks less wine and lacks confidence navigating wine lists 2. Older loyal consumers are ageing out of high-frequency consumption	1. Premium dining venues are expensive to service and recovering slowly 2. Clubs and night venues deprioritise wine due to low demand and margins	1. Wine brands underinvest in training and activation compared to spirits 2. Lack of story and emotional connection reduces wine's engagement at point-of-sale

4. DECISION DRIVERS

How do consumers make purchase decisions and who has the greatest influence on those decisions?

Decision drivers

1

Consumers are highly value-conscious and prefer familiar drink choices. Most on-premise consumers make spontaneous decisions of what type of drink to purchase, however, will stick to drinks they know they'll enjoy, driven by a strong desire to avoid wasting money. This cautious behaviour is consistent across age groups and reflects a broader focus on value, health and intentional consumption.

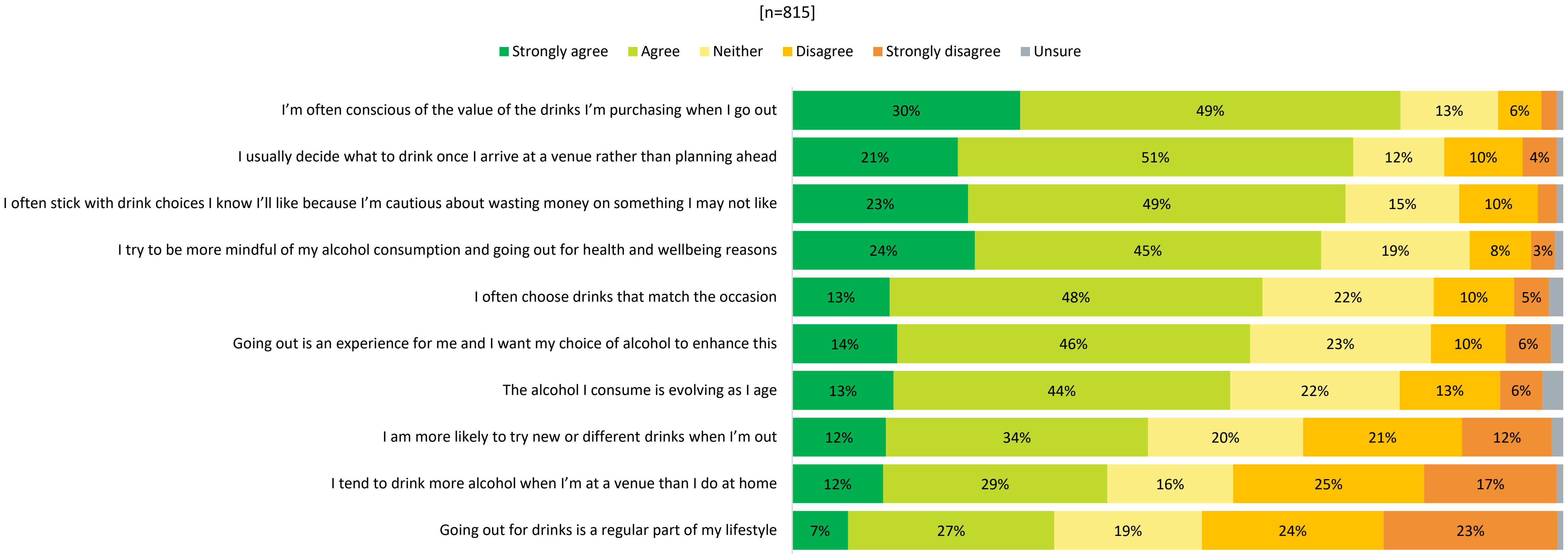
2

Staff influence is significant but often underutilised, as limited wine knowledge and confidence among frontline teams can hinder recommendations, pushing consumers (especially younger or less confident drinkers) toward simpler alternatives.

3

When wine feels integrated into the venue's atmosphere (e.g. curated lists, wine racks, fine dining) it gains relevance. Promotions (e.g. happy hour, tastings) and ceremonial elements like bottle service also enhance appeal by reducing risk and adding value to the experience.

Consumers are generally highly conscious of the value of the drink they are purchasing when on-premise. Drink selection often being spontaneous and commonly grounded in choices they know they'll like as they are conscious of wasting money



15. Please review the following statements related to your on-premise alcohol consumption attitudes and rate your level of agreement for each – Source: Square Holes 'On-Premise Research Online Survey' 2025

Those aged 18 – 29 observe the highest incidence for agreement with more mindful alcohol consumption, indicating a potentially higher consciousness of health and wellbeing and how this relates to their alcohol habits

Column %	Total	18 - 29	30 - 44	45 - 59	60+	Always	Often	Sometimes	Rarely	Never
I'm often conscious of the value of the drinks I'm purchasing when I go out	79%	78%	77%	80%	80%	86%	81%	76%	72%	68%
I usually decide what to drink once I arrive at a venue rather than planning ahead	73%	82%	70%	73%	73%	69%	78%	73%	66%	36%
I often stick with drink choices I know I'll like because I'm cautious about wasting money on something I may not like	72%	71%	70%	70%	75%	81%	73%	69%	67%	56%
I try to be more mindful of my alcohol consumption and going out for health and wellbeing reasons	69%	84%	64%	69%	70%	77%	71%	65%	61%	56%
I often choose drinks that match the occasion	61%	73%	74%	56%	52%	56%	71%	60%	42%	12%
Going out is an experience for me and I want my choice of alcohol to enhance this	59%	80%	68%	59%	50%	66%	67%	55%	40%	24%
The alcohol I consume is evolving as I age	57%	82%	67%	55%	46%	64%	65%	51%	39%	28%
I am more likely to try new or different drinks when I'm out	46%	63%	62%	45%	31%	43%	53%	45%	30%	20%
I tend to drink more alcohol when I'm at a venue than I do at home	41%	67%	54%	41%	26%	43%	42%	45%	27%	16%
Going out for drinks is a regular part of my lifestyle	34%	41%	45%	34%	23%	30%	41%	34%	12%	8%
Column n	815	49	253	211	301	111	341	271	67	25

Note: In this chart, green shades represent higher levels of response selection, while red shades indicate lower levels of response selection. The intensity of the colour reflects the frequency of selection

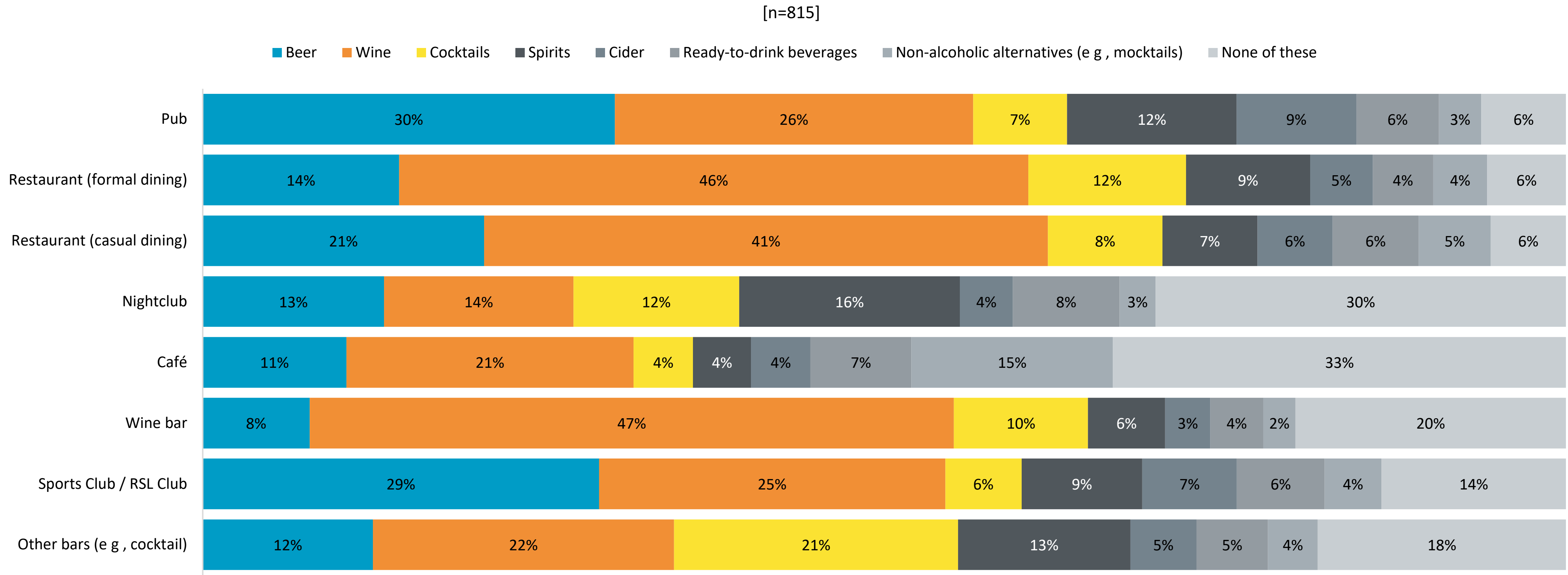
15. Please review the following statements related to your on-premise alcohol consumption attitudes and rate your level of agreement for each – Source: Square Holes 'On-Premise Research Online Survey' 2025

Bridging the gap for wine consumption at critical phases of the lifestage journey

"A Sparkling Moscato with peach or a Lemon Prosecco, that stuff is off the charts at the moment. **What that's doing is giving those consumers who are on that journey the taste profile they want. They can drink a wine now. They don't have to take a left-hand turn here and go for a Chardonnay or Cabernet. They can step into wine but driven by the priority of the taste profile**. These people aren't concerned about the GI and region, the vintage, the blend. They go 'There's a lemon-flavoured Prosecco in a bottled wine, let's look at that'. That's a much easier jump from an RTD."

Winery

Wine generally occupies a large proportion of typical drink selection across the various prompted venue types. Leading selection in 4 of the 8 categories



13. What do you typically drink when in these on-premise venues? – Source: Square Holes 'On-Premise Research Online Survey' 2025

Wine occupies a strong presence across the various venue types for typical drink selection - notably, within wine bars and formal dining restaurants. Although those aged 18 – 29 observe a far greater spread of drink / venue selection (including cocktails and spirits) indicating a lesser preference / default for wine consumption

18 - 29

% Row Responses	Beer	Wine	Cocktails	Spirits	Cider	RTDs	Non-alcoholic alts	None of these
Pub	18%	24%	13%	15%	15%	8%	3%	4%
Restaurant (formal dining)	8%	37%	19%	13%	9%	10%	4%	1%
Restaurant (casual dining)	10%	31%	25%	10%	10%	10%	4%	1%
Nightclub	11%	13%	20%	26%	8%	14%	2%	5%
Café	3%	19%	11%	6%	10%	11%	19%	19%
Wine bar	11%	45%	13%	9%	8%	7%	3%	5%
Sports Club / RSL Club	15%	23%	6%	9%	15%	10%	3%	20%
Other bars (e g , cocktail)	9%	21%	26%	17%	11%	8%	2%	5%

30 - 44

% Row Responses	Beer	Wine	Cocktails	Spirits	Cider	RTDs	Non-alcoholic alts	None of these
Pub	26%	21%	11%	15%	10%	10%	4%	3%
Restaurant (formal dining)	15%	35%	17%	11%	7%	6%	5%	3%
Restaurant (casual dining)	21%	32%	12%	9%	8%	10%	6%	3%
Nightclub	15%	14%	16%	21%	6%	12%	4%	12%
Café	13%	19%	7%	7%	7%	11%	14%	22%
Wine bar	11%	43%	14%	8%	5%	7%	4%	7%
Sports Club / RSL Club	27%	18%	9%	10%	10%	10%	5%	10%
Other bars (e g , cocktail)	14%	21%	26%	14%	6%	7%	6%	7%

45 - 59

% Row Responses	Beer	Wine	Cocktails	Spirits	Cider	RTDs	Non-alcoholic alts	None of these
Pub	31%	26%	7%	14%	10%	5%	3%	4%
Restaurant (formal dining)	16%	47%	10%	10%	5%	4%	4%	4%
Restaurant (casual dining)	23%	40%	6%	8%	6%	6%	6%	5%
Nightclub	17%	15%	11%	18%	3%	7%	2%	27%
Café	14%	21%	4%	4%	3%	7%	16%	30%
Wine bar	8%	51%	12%	7%	3%	3%	1%	15%
Sports Club / RSL Club	31%	25%	6%	12%	6%	5%	3%	13%
Other bars (e g , cocktail)	15%	21%	23%	15%	5%	6%	3%	11%

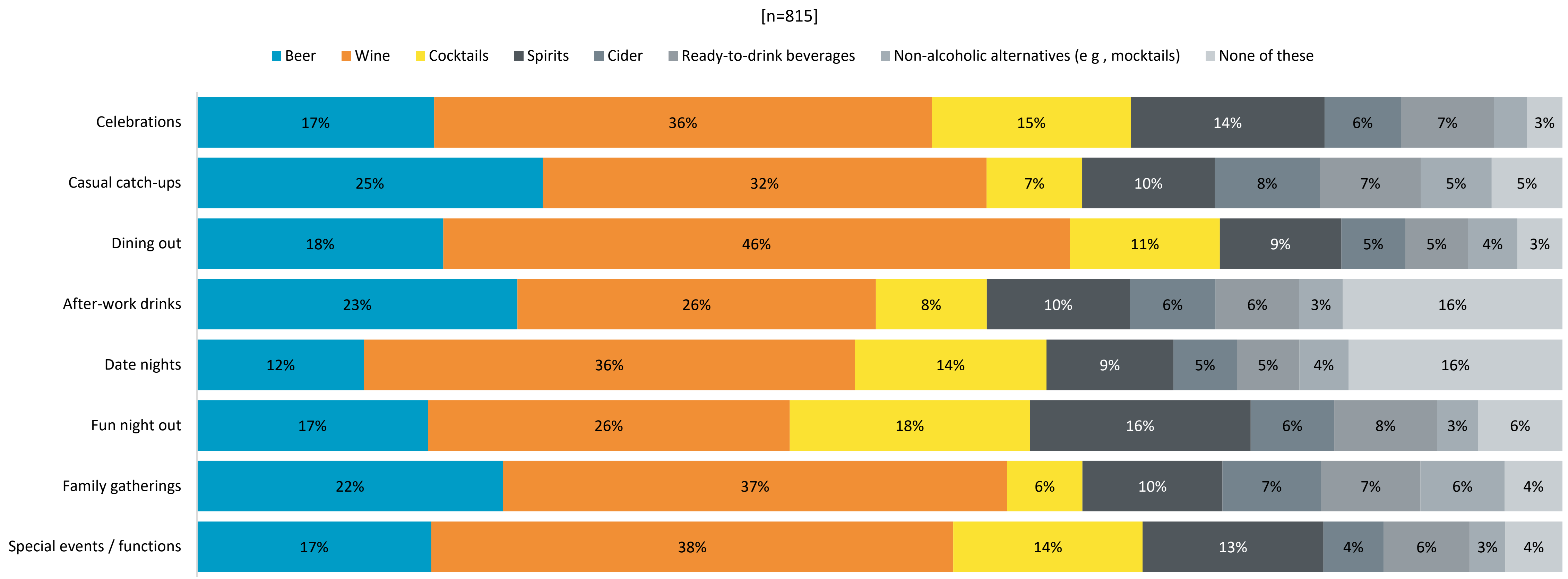
60+

% Row Responses	Beer	Wine	Cocktails	Spirits	Cider	RTDs	Non-alcoholic alts	None of these
Pub	37%	33%	1%	7%	5%	2%	2%	12%
Restaurant (formal dining)	14%	61%	4%	5%	1%	1%	2%	12%
Restaurant (casual dining)	21%	56%	2%	3%	2%	2%	5%	10%
Nightclub	8%	14%	6%	5%	1%	1%	1%	64%
Café	7%	23%	1%	1%	1%	3%	14%	50%
Wine bar	3%	49%	3%	1%	1%	0%	1%	43%
Sports Club / RSL Club	33%	35%	2%	5%	3%	2%	4%	16%
Other bars (e g , cocktail)	9%	25%	11%	8%	2%	1%	1%	43%

Note: In this chart, green shades represent stronger associations, while red shades indicate weaker associations. The intensity of the colour reflects the strength of the venue / drink relationship

13. What do you typically drink when in these on-premise venues? – Source: Square Holes 'On-Premise Research Online Survey' 2025

As with venue type, wine generally has a solid association with most occasions – notably dining out and special events / functions. Yet, wine is less associated with fun nights out and after-work drinks



14. Thinking about how different occasions influence your on-premise drink selection, which of the following beverage options do you personally drink and associate with each of the occasions listed below? – Source: Square Holes 2025

When considering drink selection based on occasion, wine often occupies one of the strongest associations. Again, the spread of drink selection is far greater for younger age groups when compared to older generations

18 - 29

% Row Responses	Beer	Wine	Cocktails	Spirits	Cider	RTDs	Non-alcoholic alts.	None of these
Celebrations	8%	36%	21%	15%	9%	10%	1%	0%
Casual catch-ups	15%	21%	12%	10%	15%	16%	8%	2%
Dining out	8%	32%	27%	9%	9%	12%	4%	0%
After-work drinks	15%	25%	13%	15%	16%	8%	3%	6%
Date nights	10%	30%	28%	7%	10%	10%	4%	1%
Fun night out	10%	21%	20%	19%	12%	13%	3%	2%
Family gatherings	16%	31%	5%	16%	12%	11%	8%	1%
Special events	10%	30%	23%	13%	7%	13%	3%	3%

30 - 44

% Row Responses	Beer	Wine	Cocktails	Spirits	Cider	RTDs	Non-alcoholic alts.	None of these
Celebrations	17%	28%	18%	15%	7%	9%	3%	2%
Casual catch-ups	23%	27%	10%	11%	9%	10%	7%	3%
Dining out	19%	35%	16%	11%	6%	7%	4%	2%
After-work drinks	23%	27%	12%	12%	7%	9%	4%	6%
Date nights	14%	33%	18%	14%	6%	6%	4%	5%
Fun night out	15%	20%	22%	18%	7%	10%	4%	3%
Family gatherings	19%	32%	8%	11%	9%	11%	7%	3%
Special events	15%	32%	16%	16%	6%	8%	4%	2%

45 - 59

% Row Responses	Beer	Wine	Cocktails	Spirits	Cider	RTDs	Non-alcoholic alts.	None of these
Celebrations	17%	32%	16%	16%	6%	8%	2%	3%
Casual catch-ups	26%	31%	6%	11%	8%	8%	4%	5%
Dining out	18%	43%	9%	11%	4%	4%	4%	5%
After-work drinks	27%	25%	6%	13%	7%	8%	3%	11%
Date nights	14%	38%	14%	9%	5%	5%	4%	11%
Fun night out	18%	25%	18%	18%	7%	8%	2%	4%
Family gatherings	24%	33%	6%	12%	7%	7%	5%	6%
Special events	18%	35%	15%	15%	5%	6%	2%	5%

60+

% Row Responses	Beer	Wine	Cocktails	Spirits	Cider	RTDs	Non-alcoholic alts.	None of these
Celebrations	21%	50%	7%	10%	3%	2%	3%	4%
Casual catch-ups	30%	42%	3%	7%	5%	3%	3%	8%
Dining out	19%	63%	3%	5%	2%	1%	2%	4%
After-work drinks	23%	26%	4%	6%	2%	1%	2%	35%
Date nights	9%	39%	5%	5%	1%	1%	2%	37%
Fun night out	20%	37%	11%	11%	3%	2%	2%	13%
Family gatherings	26%	46%	2%	7%	5%	3%	6%	6%
Special events	20%	50%	8%	9%	1%	2%	2%	6%

Note: In this chart, green shades represent stronger associations, while red shades indicate weaker associations. The intensity of the colour reflects the strength of the occasion / drink relationship

14. Thinking about how different occasions influence your on-premise drink selection, which of the following beverage options do you personally drink and associate with each of the occasions listed below? – Source: Square Holes 'On-Premise Research Online Survey' 2025

“The time of day and how long I'm going to be out for changes my drinking behaviour… **For a shorter period and when I don't plan to have that many drinks, I'd rather just enjoy the wine. But if I anticipate that I'm going to drink a lot, I don't really want wine to be involved.**”

Focus Group One, Aged 18 – 29, Mixed States

The venue type and environment presented to consumers plays a significant role in influencing consumption behaviours

	Pub	Café	Wine bar	Restaurant (casual dining)	Restaurant (formal dining)
Premise design	Beer-centric; minimal wine display; loud and open. Social focus	Coffee / casual focused; limited space for wine elements	Designed around wine — ambient lighting, wine racks, tasting counters	Functional; wine secondary to layout. Often quick turnaround	Elegant; wine prominent, fine glassware, dedicated service spaces
Customers	Young, social groups; wine less prominent, low wine expectations	Casual friends and family; alcohol less common, wine not default	Wine the default, that's why they're there. To explore wines with friends	Mixed demographics; cocktails, beer, wine chosen casually or for sharing	Special occasion, business lunch, likely less frequent, wine prominent
Staff interactions	Generalists, little wine training; beer-focused. Low customer expectations	Barista-style staff; though-put service, with low wine knowledge	Wine-trained staff; generally internally trained; 'fun' sales driven	Mixed knowledge; service varies by venue. Casual wine advice	Sommeliers, team of sommeliers to help educate customer / sell wine
Menus	Basic: by the glass and by the bottle, value and known brands important	Similar to pub and dependent of café focus. Wine by glass and bottle	Extensive wine list, often some new, on trend. Paper based, wall or other	Wine often secondary to cocktails and made to fit the fast-paced venue	Curated list, glass, bottles and higher end; educational and upsell options
Wine visibility	Wine brand / bottle marketing on tables competing with other options	Promotions of brands to build brand awareness and ease of choosing	Wine on display, central to setting. Clear wine signals across venue	Wine competes at bar with spirits and beer, wine glasses on tables	List presented formally; formal wine service part of the experience
Wine consumption	Generally by-glass, occasional shared. Personal preference key	By-glass generally, but sometimes by bottle, need prompting to prioritise	Skew to wine, perhaps a cocktail too. Bottles more so; glasses to explore	Mostly by-glass; some bottles; paired with food, personal preference	Bottles common for special experience; paired with courses; ritualised and paced consumption

"I think the customer set is getting smaller for reasons unrelated to wine. I think wine specifically would be going down because wine can be tough from a bottle perspective. **People are less likely to put their card down for the entire table. People are less likely to order for their friends. And when people order something, they order for themselves. You look at QR code ordering and now all of a sudden, these group sharing occasions are not there.** You order for yourself, you pay for yourself, you do all that. Wine bottles typically are something that you get for the table in the on-premise. We're in a world where consumption is far more individualised. I like Sauvignon Blanc, that person likes Pinot Grigio, I'll just get a glass of the Sauvignon Blanc. That person will get a Pinot grigio. That's a much more comfortable situation nowadays."

On-premise venue

Industry are strong in their stance that staff in bars, pubs and restaurants have a major influence on what gets poured. Yet, many staff feel unprepared to recommend wine. Without adequate staff training, consumers often default to simpler options like beer or cocktails - seen as easier to purchase, especially for younger or less confident customers

Spirits brands were frequently highlighted as leaders in staff engagement, offering consistent training, support and incentives. In contrast, wine training is often inconsistent and not always accessible for casual or high-turnover staff, limiting confidence at the point of sale.

Interviewees saw clear value in more practical, scalable wine education[1] - focused on core varietals, food pairing and service tips. Visual aids and simple prompts could support everyday conversations, while incentives like winery visits or staff recognition could help boost engagement with venue staff / leaders and drive wine relevance on-premise.

"**Training, training, training, training and making sure that there are recognisable varieties from recognisable regions** so there's always the safe and familiar choice… You make sure you've covered off on those key varietal options and then just train the crap out of the staff to make sure they know how to sell it."

On-premise venue

[1] Such as Wine Australia's Australian Wine Discovered resource which is freely available - https://www.wineaustralia.com/education

“[The spirits industry] made advocates out of the actual people who are selling the stuff and they made advocates out of the people behind the bar who would be recommending it and pushing it on people. I don't know if I see much of that in the world of wine. I see a lot of talk about educating the consumers and I do see talk about educating the staff, but I don't see them making it fun for staff. The way that Diageo's world-class cocktail competitions made education fun, the way that Brown-Forman’s industry parties made education and getting involved fun. **I don't see winemakers ingratiating themselves, not with the on-premise industry, but with the on-premise community.**”

On-premise venue

5. ATTRIBUTE PRIORITIES

What attributes are most important and do these changes according to channel or consumer segment?

Attribute priorities

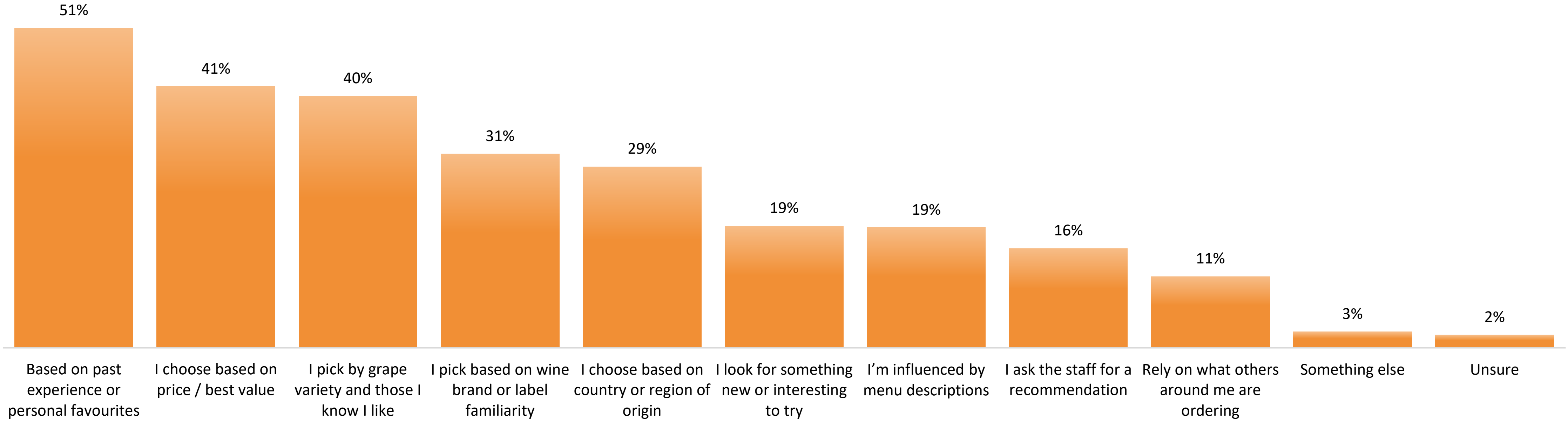
1 **Wine selection is driven by familiarity, value, and grape variety - especially among regular consumers.** Over half of consumers choose wine based on personal favourites or past experiences, followed by price and grape variety (i.e., name of the grape). More frequent wine drinkers lean on grape and origin attributes, while occasional drinkers prioritise value.

2 **Age and frequency shape wine decision drivers, with younger consumers more brand-driven and older groups guided by variety and origin**. Younger age groups (18–29) show stronger reliance on brand familiarity and menu cues, while older consumers (60+) place higher importance on grape variety and region. Less frequent wine drinkers are more sensitive to pricing and promotions.

3 **The quality and clarity of wine offerings matter most across channels, but support tools like QR codes and staff influence vary by demographic**. Quality and range are the top attributes yet QR codes (as a means to promote wine ordering) divide opinions, positively influencing under-40s, but deterring 60+ groups. Staff knowledge and venue expertise are less influential overall but can support less confident segments.

Over half (51%) of on-premise wine consumers are likely to purchase based on previous experience with a wine or known 'personal favourites'. Beyond reliance of past experience, price and grape variety play a significant role in wine selection. Exploration and other external stimulus such as staff recommendation are less likely to influence

[of those who purchase wine on-premise at least 'rarely', n=790]



22. How do you typically decide which wine to order? – Source: Square Holes 'On-Premise Research Online Survey' 2025

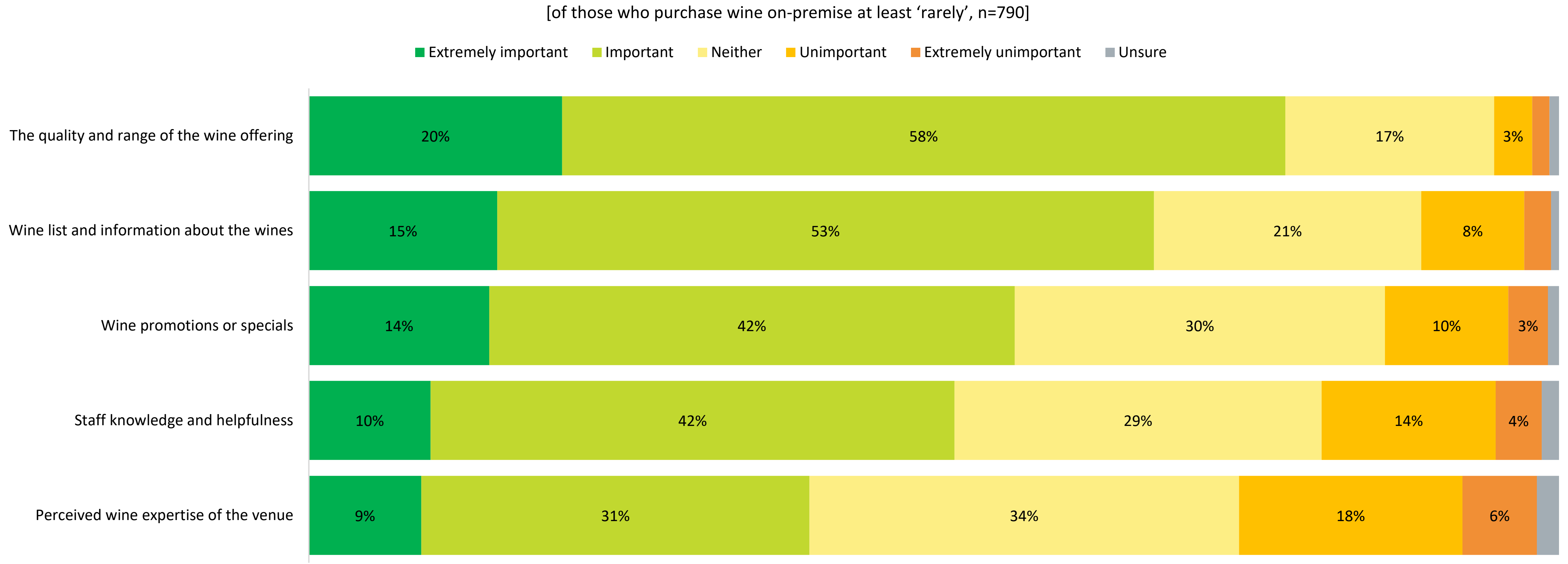
Consumers with less frequent on-premise wine purchasing are more likely to favour price / value compared to those who always drink wine, where they place higher importance on grape variety and country / region of origin. Younger age cohorts show the greatest reliance on brand or label familiarity, whilst being less dependent on grape variety in their decision making

Column %	Total	18 - 29	30 - 44	45 - 59	60+	Always	Often	Sometimes	Rarely
Based on past experience or personal favourites	51%	50%	45%	48%	57%	49%	53%	51%	39%
I choose based on price / best value	41%	38%	41%	43%	41%	37%	44%	43%	27%
I pick by grape variety and those I know I like	40%	21%	35%	39%	47%	46%	45%	34%	30%
I pick based on wine brand or label familiarity	31%	40%	32%	23%	33%	40%	35%	25%	13%
I choose based on country or region of origin	29%	13%	28%	27%	33%	44%	30%	24%	15%
I look for something new or interesting to try	19%	25%	23%	19%	15%	17%	24%	17%	7%
I’m influenced by menu descriptions	19%	21%	25%	18%	15%	22%	20%	18%	12%
I ask the staff for a recommendation	16%	17%	24%	17%	8%	17%	20%	13%	3%
Rely on what others around me are ordering	11%	23%	14%	9%	9%	12%	12%	11%	10%
Something else	3%	2%	2%	1%	4%	4%	2%	2%	6%
Unsure	2%	0%	1%	3%	2%	0%	0%	4%	7%
Column n	790	48	249	203	289	111	341	271	67

Note: In this chart, green shades represent higher levels of response selection, while red shades indicate lower levels of response selection. The intensity of the colour reflects the frequency of selection

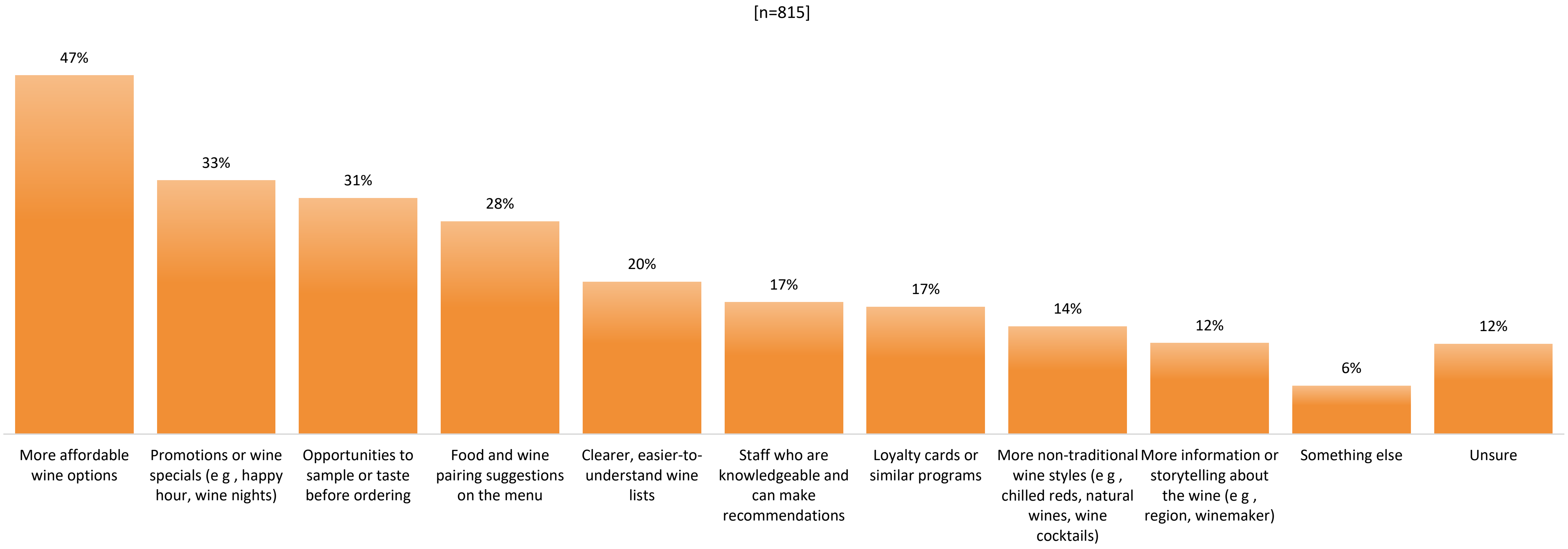
22. How do you typically decide which wine to order? – Source: Square Holes ‘On-Premise Research Online Survey’ 2025

The quality and range of wine offering is by far the most important factor in wine selection when on-premise



24. How important are the following factors in your wine selection decision making when on-premise? – Source: Square Holes 'On-Premise Research Online Survey' 2025

Beyond increasing the option of affordable wines, respondents[1] find promotions and the opportunity to sample or taste wines before ordering the most likely actions to encourage greater purchasing

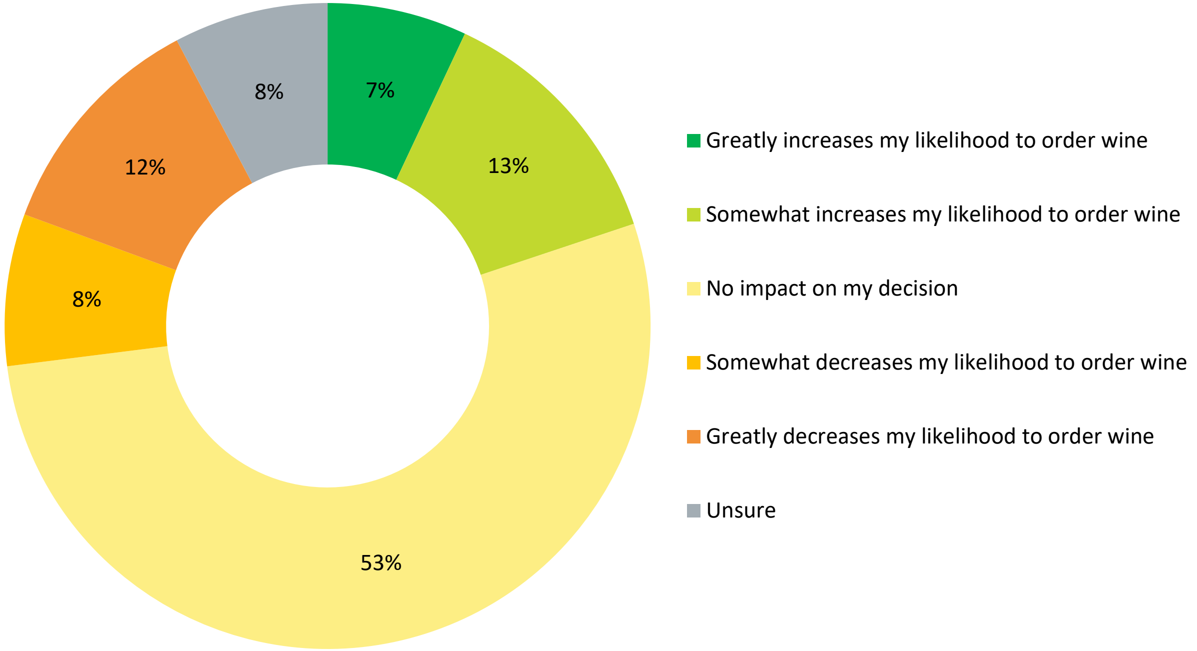


[1] A breakdown of the sample / respondents can be found In Appendix 5 (Page 113)

28. What would encourage you to order wine more often in on-premise venues? – Source: Square Holes 'On-Premise Research Online Survey' 2025

Digital ordering has mixed impact on wine choice - embraced by under-40s, resisted by over-60s. While most say QR codes don't affect their decision, younger consumers see them as a potential prompt, whereas older drinkers feel it deters wine purchases

[n=815]



Column %	18 - 29	30 - 44	45 - 59	60+
Increase likelihood NET	37%	36%	18%	4%
No impact on my decision	51%	49%	51%	58%
Decrease likelihood NET	8%	10%	18%	30%
Unsure	4%	4%	13%	8%
Column n	49	253	211	301

26. How does the use of a QR code or other digital ordering solutions influence your decision to order wine at an on-premise venue? – Source: Square Holes 'On-Premise Research Online Survey' 2025

Consumers from the survey provided a variety of suggestions to help increase wine consumption on-premise, the most frequent themes being…

- Lower prices and better value
- More affordable by the glass options
- Ability to taste before buying
- Better wine selection / variety
- Improved wine descriptions / information
- Food and wine pairing suggestions
- Promotions and special offers
- Staff recommendations and increased guidance
- Greater emphasis on local selection

Key examples of consumer suggestions have been provided below…

"A **wine list that reflects the best regions of the area**. I always choose South Australian wine over any others. The venues that don't provide this will always result in me choosing another alcoholic beverage."

"Have more affordable wine selections, or **more value for money wine choices. I do not mean cheap and poor wine quality choices. I mean good value and good taste wine choices** that are affordable and not expensive."

"I am a very basic wine drinker. **Due to the fact I would not know which wine goes with what meal; I might end up with a beer to make it simple**."

"On the drinks menu, perhaps **give a little note about which wine would be recommended with which dish**. Also, in addition, you could have a special, where the recommended wine is cheaper if you order the paired dish."

"More choice and explanation of wine I'm purchasing. **Nothing worse than buying a glass of wine and hating it**."

Note: select verbatim quotes have been chosen to reflect broader themes

29. If you could improve one aspect of the on-premise wine experience to make it more appealing and encourage greater wine consumption, what would it be? – Source: Square Holes 'On-Premise Research Online Survey' 2025

Appendices

Appendix 1: Additional survey findings

Frequency of alcohol consumption at home is generally consistent across the various states, whilst those based in New South Wales are most likely to drink on-premise at least once a month

At home

	Total	SA	NSW	VIC	QLD
Multiple times a week	46%	49%	46%	40%	48%
Once a week	24%	27%	20%	29%	21%
2 – 3 times a month	14%	11%	19%	13%	14%
Once a month	7%	6%	5%	9%	8%
Less often	8%	8%	8%	8%	9%
Never	1%	1%	1%	0%	0%
Column n	815	200	205	205	205

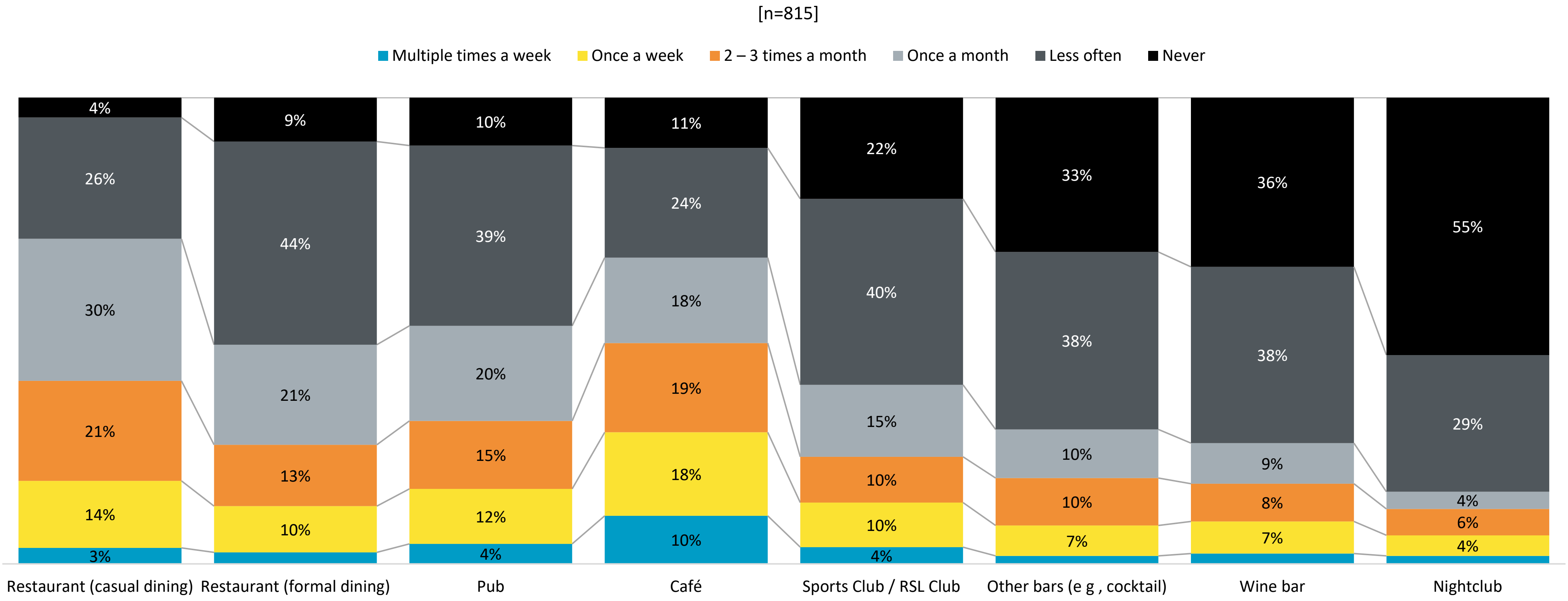
At a venue

	Total	SA	NSW	VIC	QLD
Multiple times a week	9%	7%	10%	10%	9%
Once a week	22%	24%	21%	24%	17%
2 – 3 times a month	23%	23%	23%	18%	29%
Once a month	17%	15%	20%	20%	15%
Less often	25%	26%	23%	24%	27%
Never	4%	7%	3%	4%	3%
Column n	815	200	205	205	205

Note: In this chart, green shades represent higher levels of response selection, while red shades indicate lower levels of response selection. The intensity of the colour reflects the frequency of selection

6. How often would you consume alcohol… – Source: Square Holes ‘On-Premise Research Online Survey’ 2025

The most frequented on-premise venues amongst the sample are cafés and casual dining restaurants. More specific venues such as Sports / RSL clubs, cocktail and wine bars and night clubs are far more infrequently attended



10. How often would you visit the following on-premise venues? – Source: Square Holes 'On-Premise Research Online Survey' 2025

Frequency of attending on-premise venues *by gender and age (1/2)*

		Total	Male	Female	18 - 29	30 - 44	45 - 59	60+
	At least once a month NET	**51%**	**56%**	**48%**	**59%**	**62%**	**55%**	**37%**
	Multiple times a week	4%	7%	3%	10%	6%	4%	2%
	Once a week	12%	14%	10%	16%	18%	9%	7%
Pub	2 – 3 times a month	15%	14%	15%	6%	21%	16%	10%
	Once a month	20%	21%	20%	27%	17%	26%	19%
	Less often	39%	34%	42%	33%	32%	38%	46%
	Never	10%	10%	10%	8%	6%	7%	17%
	At least once a month NET	**47%**	**51%**	**44%**	**76%**	**58%**	**41%**	**37%**
	Multiple times a week	2%	4%	1%	6%	4%	2%	1%
	Once a week	10%	11%	9%	24%	14%	10%	4%
Restaurant (formal dining)	2 – 3 times a month	13%	13%	13%	20%	19%	13%	8%
	Once a month	21%	23%	21%	24%	22%	17%	24%
	Less often	44%	39%	47%	24%	36%	49%	49%
	Never	9%	9%	9%	0%	6%	10%	14%
	At least once a month NET	**70%**	**72%**	**68%**	**90%**	**78%**	**65%**	**62%**
	Multiple times a week	3%	4%	3%	6%	7%	2%	1%
	Once a week	14%	14%	14%	22%	17%	15%	10%
Restaurant (casual dining)	2 – 3 times a month	21%	22%	21%	27%	29%	18%	17%
	Once a month	30%	31%	30%	35%	25%	30%	35%
	Less often	26%	24%	28%	8%	18%	31%	32%
	Never	4%	5%	4%	2%	4%	4%	6%
	At least once a month NET	**15%**	**18%**	**13%**	**41%**	**27%**	**13%**	**3%**
	Multiple times a week	2%	2%	2%	4%	4%	1%	0%
	Once a week	4%	7%	3%	10%	7%	5%	1%
Nightclub	2 – 3 times a month	6%	6%	6%	18%	10%	5%	0%
	Once a month	4%	4%	4%	8%	7%	2%	2%
	Less often	29%	26%	32%	43%	38%	34%	16%
	Never	55%	56%	55%	16%	34%	53%	80%

Note: In this chart, green shades represent higher levels of response selection, while red shades indicate lower levels of response selection. The intensity of the colour reflects the frequency of selection

10. How often would you visit the following on-premise venues? – Source: Square Holes 'On-Premise Research Online Survey' 2025

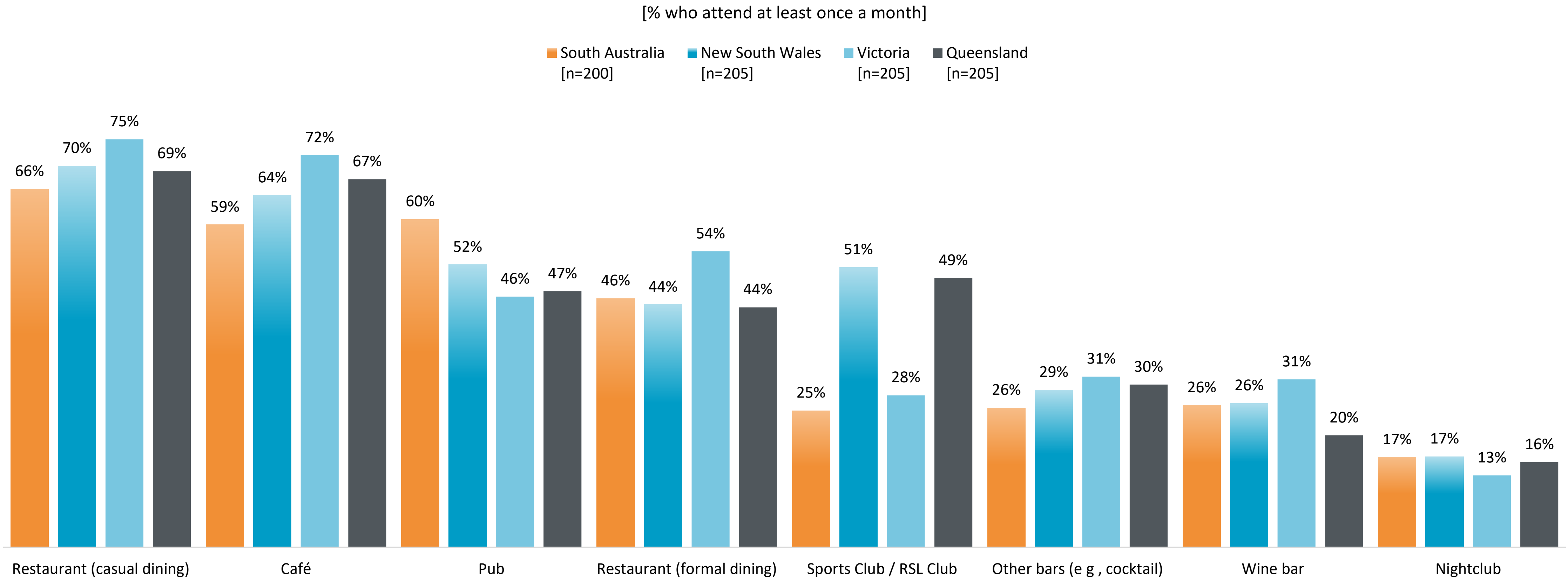
Frequency of attending on-premise venues *by gender and age (2/2)*

		Total	Male	Female	18 - 29	30 - 44	45 - 59	60+
	At least once a month NET	**66%**	**63%**	**67%**	**86%**	**72%**	**65%**	**57%**
	Multiple times a week	10%	12%	9%	20%	14%	11%	5%
	Once a week	18%	16%	20%	16%	21%	18%	15%
Café	2 – 3 times a month	19%	17%	21%	31%	22%	18%	16%
	Once a month	18%	19%	18%	18%	15%	18%	21%
	Less often	24%	24%	24%	10%	22%	27%	25%
	Never	11%	13%	9%	4%	6%	8%	18%
	At least once a month NET	**26%**	**28%**	**25%**	**55%**	**39%**	**25%**	**11%**
	Multiple times a week	2%	3%	2%	8%	4%	1%	0%
	Once a week	7%	8%	6%	14%	11%	8%	1%
Wine bar	2 – 3 times a month	8%	8%	8%	18%	13%	8%	3%
	Once a month	9%	9%	9%	14%	11%	9%	6%
	Less often	38%	33%	41%	29%	42%	41%	34%
	Never	36%	39%	34%	16%	19%	34%	55%
	At least once a month NET	**38%**	**47%**	**32%**	**41%**	**40%**	**42%**	**34%**
	Multiple times a week	4%	6%	2%	2%	4%	2%	4%
	Once a week	10%	12%	8%	16%	9%	10%	8%
Sports Club / RSL Club	2 – 3 times a month	10%	11%	9%	12%	14%	10%	6%
	Once a month	15%	18%	14%	10%	13%	20%	15%
	Less often	40%	36%	43%	29%	41%	37%	43%
	Never	22%	17%	25%	31%	19%	21%	24%
	At least once a month NET	**29%**	**31%**	**28%**	**63%**	**48%**	**26%**	**10%**
	Multiple times a week	2%	2%	2%	2%	4%	1%	0%
	Once a week	7%	10%	4%	18%	11%	4%	2%
Other bars (e.g., cocktail)	2 – 3 times a month	10%	8%	12%	20%	17%	10%	3%
	Once a month	10%	11%	10%	22%	16%	10%	4%
	Less often	38%	34%	41%	22%	38%	47%	34%
	Never	33%	36%	31%	14%	14%	27%	56%

Note: In this chart, green shades represent higher levels of response selection, while red shades indicate lower levels of response selection. The intensity of the colour reflects the frequency of selection

10. How often would you visit the following on-premise venues? – Source: Square Holes ‘On-Premise Research Online Survey’ 2025

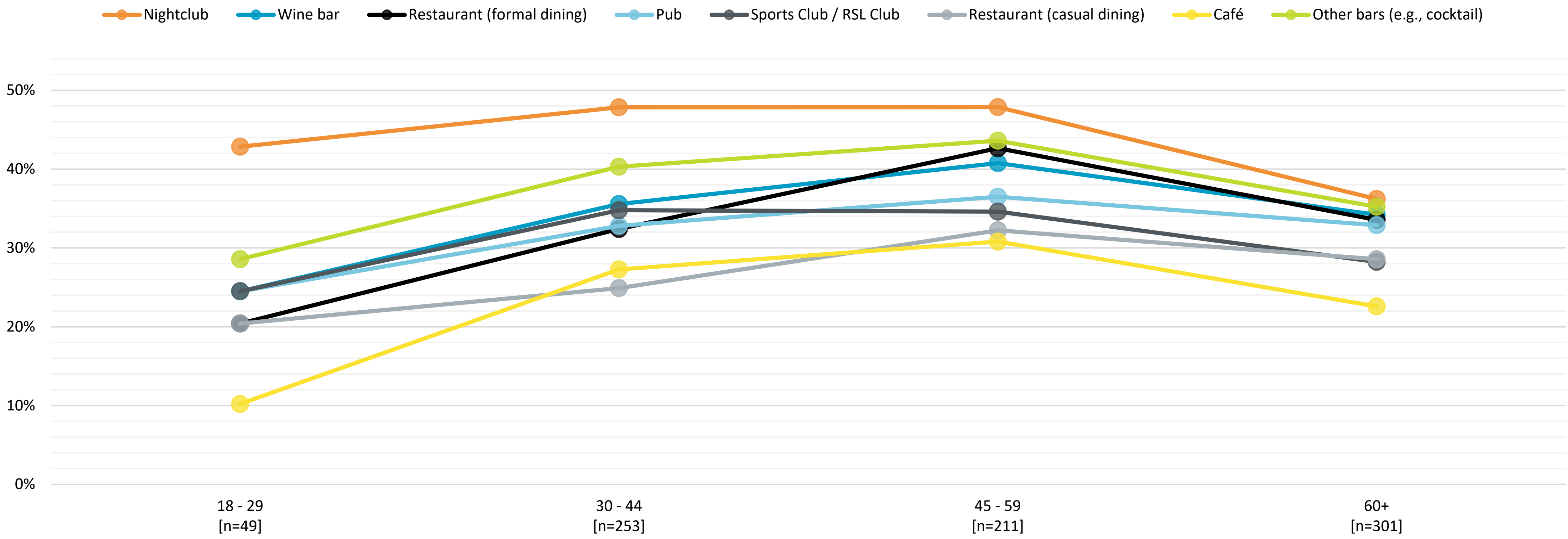
Sports Clubs / RSL Clubs are far more frequented in New South Wales (51%) and Queensland (49%) compared to South Australia (25%) and Victoria (28%)



10. How often would you visit the following on-premise venues? – Source: Square Holes ‘On-Premise Research Online Survey’ 2025

Generally, those aged 45 – 59 note the greatest decrease in visitation frequency compared to 3 years ago across the various venue types

[% who specified their visitation had decreased compared to 3 years ago]



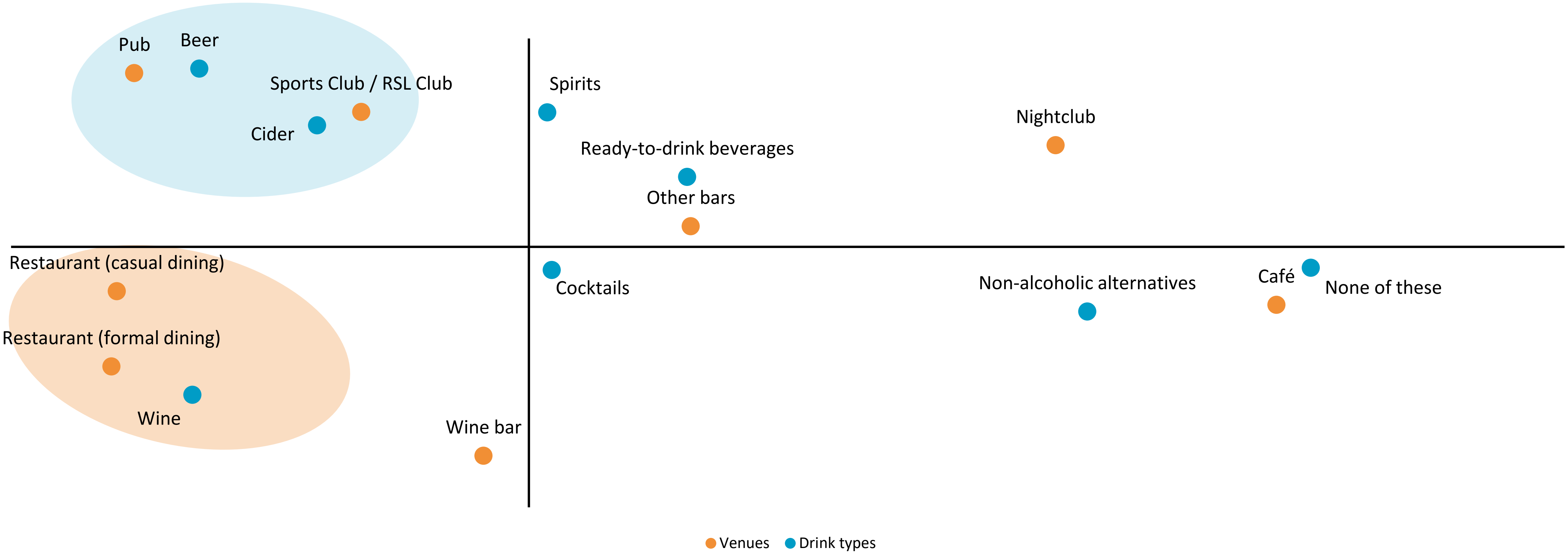
11. Would you say your visitation of these on-premise venues has increased, decreased or remained the same compared to 3 years ago? % that responded with 'decreased' – Source: Square Holes 'On-Premise Research Online Survey' 2025

Perception of changing on-premise habits

[Note: select verbatim quotes have been chosen to reflect broader themes]

18 - 29	30 - 44	45 - 59	60+
Cost of living and financial pressures "Used to go to these places every week or more but I just can't afford it now." "Have stayed home more as cannot always afford to go out." **Changing preferences with age, maturing** "I am going out less for drinking purposes but probably going out more for dinners." "I have been visiting more casual dining restaurants and bars compared to formal dining and night clubs." **Changing social circumstances / lifestyle shifts** "Decreased due to change in interests. As I have gotten older I am less focused on the night life and drinking and more focused on my health and making the most of the weekends."	**Cost of living and financial pressures** "I am going out less because of the rising cost of living. My cafe frequenting has stayed the same because the options for food and drink are the cheapest comparatively." "I would say they have definitely decreased with financial reasons the primary driver of this change and opting to either consume less or consume at home." **Family responsibilities** "I'm going out less often as I have young children and no access to regular babysitting." "Growing family with 2 children under 5 has meant we go out less to bars and fancy restaurants." **Changing preferences with age / lifestyle shifts** "I think as I've gotten older I've come to enjoy the comfort of my home, I'm also a mum now so outings are quite restricted with what's suitable for a child." "Go out less stay home and cook more and drink less." **Health, wellness and fitness focus** "Start self-disciplined fitness and eat healthier." "Getting old and would love to have a healthier life."	**Cost of living and financial pressures** "I certainly drink more regularly at home due to the high cost of drinking while out and the poor value. I also find service to be poor." "Cost of living has increased so we don't go out much now at all. Usually only for a special family occasion and only because that is where others have chosen." **Changing preferences with age / lifestyle shifts** "I used to go often and buy multiple drinks. Now I don't go as often and only ever buy just 1 drink." "I generally can't be bothered getting dressed up and going out anymore." **Shift towards at-home or value-oriented socialising** "I think I've been into drinking more at home than at premises."	**Cost of living and financial pressures** "Getting older. Not going out as much. Habits have changed. Partner has other priorities. We eat and drink well at home. Costs have increased post covid." "In the past I visited the RSL club 2 or 3 times a week. Now I only visit once a week." **Aging and health considerations** "Used to be a big drinker but it is not good for your health, I have lots of friends who have either died or have health issues because of heavy drinking." "I rarely visit since I greatly reduced my alcohol intake for medical reasons and financial reasons."

Whilst wine is generally seen to be an appropriate option for most across all the prompted venue types, they are strongly differentiated by their association with restaurants (both formal and casual) and wine bars



Note: This data visualisation depicts venue / drink type association and consumption based on a statistical function called correspondence analysis. This is used to illustrate similar or differentiating factors of drink types. The closer to the centre of the axes, the more similar the drink type selection is based on venue type. The further from the centre, the more differentiated they are.

13. What do you typically drink when in these on-premise venues? – Source: Square Holes 'On-Premise Research Online Survey' 2025

The selection of wine across venue types is generally consistent when comparing by state. Wine has the strongest association to pubs in South Australia and the weakest in New South Wales

South Australia

% Row Responses	Beer	Wine	Cocktails	Spirits	Cider	RTDs	Non-alcoholic alts	None of these
Pub	29%	33%	6%	11%	8%	5%	2%	7%
Restaurant (formal dining)	16%	47%	6%	12%	4%	4%	2%	8%
Restaurant (casual dining)	20%	44%	6%	10%	4%	6%	2%	8%
Nightclub	13%	15%	9%	18%	3%	7%	1%	32%
Café	13%	26%	5%	4%	3%	8%	10%	32%
Wine bar	9%	51%	7%	6%	2%	4%	2%	19%
Sports Club / RSL Club	26%	23%	4%	7%	6%	4%	3%	27%
Other bars (e g , cocktail)	10%	22%	18%	17%	3%	4%	3%	22%

Victoria

% Row Responses	Beer	Wine	Cocktails	Spirits	Cider	RTDs	Non-alcoholic alts	None of these
Pub	34%	27%	5%	12%	8%	6%	3%	4%
Restaurant (formal dining)	13%	49%	13%	8%	6%	4%	4%	4%
Restaurant (casual dining)	20%	46%	9%	5%	6%	7%	5%	2%
Nightclub	13%	14%	13%	16%	4%	7%	2%	30%
Café	10%	23%	5%	4%	6%	8%	14%	30%
Wine bar	8%	52%	9%	4%	3%	5%	3%	16%
Sports Club / RSL Club	31%	26%	5%	6%	7%	6%	5%	13%
Other bars (e g , cocktail)	13%	26%	21%	10%	5%	6%	3%	15%

New South Wales

% Row Responses	Beer	Wine	Cocktails	Spirits	Cider	RTDs	Non-alcoholic alts	None of these
Pub	31%	22%	9%	13%	10%	6%	4%	5%
Restaurant (formal dining)	13%	43%	15%	8%	4%	5%	5%	5%
Restaurant (casual dining)	21%	39%	10%	7%	6%	8%	6%	4%
Nightclub	13%	13%	17%	14%	5%	7%	3%	27%
Café	9%	17%	6%	6%	5%	7%	15%	34%
Wine bar	8%	39%	13%	6%	5%	5%	3%	21%
Sports Club / RSL Club	28%	27%	8%	10%	9%	7%	5%	7%
Other bars (e g , cocktail)	13%	19%	24%	11%	5%	6%	3%	18%

Queensland

% Row Responses	Beer	Wine	Cocktails	Spirits	Cider	RTDs	Non-alcoholic alts	None of these
Pub	27%	23%	7%	13%	10%	7%	4%	8%
Restaurant (formal dining)	15%	45%	11%	8%	4%	4%	5%	7%
Restaurant (casual dining)	21%	37%	9%	6%	7%	4%	7%	8%
Nightclub	14%	13%	10%	17%	3%	9%	3%	31%
Café	10%	18%	2%	3%	3%	6%	20%	38%
Wine bar	6%	48%	10%	6%	3%	2%	2%	24%
Sports Club / RSL Club	30%	26%	5%	12%	6%	8%	4%	10%
Other bars (e g , cocktail)	13%	21%	19%	12%	6%	5%	5%	18%

Note: In this chart, green shades represent stronger associations, while red shades indicate weaker associations. The intensity of the colour reflects the strength of the venue / drink relationship

13. What do you typically drink when in these on-premise venues? – Source: Square Holes ‘On-Premise Research Online Survey’ 2025

Females on average observe a higher frequency of wine selection when on-premise compared to males. Whilst 18 – 29-year-olds note the highest incidence of ‘always’ responses, they also described the greatest variance in drink selection based on venue type and occasion

	Total	Male	Female	18 - 29	30 - 44	45 - 59	60+
Average	**3.5**	**3.4**	**3.7**	**3.7**	**3.5**	**3.4**	**3.6**
Always	14%	11%	16%	22%	10%	5%	21%
Often	42%	39%	44%	35%	45%	43%	39%
Sometimes	33%	35%	32%	35%	36%	41%	26%
Rarely	8%	11%	6%	6%	8%	7%	10%
Never	3%	5%	1%	2%	2%	4%	4%
Column n	815	347	466	49	253	211	301

Note: In this chart, green shades represent higher levels of response selection, while red shades indicate lower levels of response selection. The intensity of the colour reflects the frequency of selection

17. How often do you choose wine when drinking on-premise? – Source: Square Holes ‘On-Premise Research Online Survey’ 2025

Rationale behind frequency of wine consumption when on-premise

[Note: select verbatim quotes have been chosen to reflect broader themes]

Always (14%)	**Often** (42%)	**Sometimes** (33%)	**Rarely** (8%)	**Never** (3%)
Favourite drink – enjoyment, preference for taste, confident choice “I prefer wine to any other form of alcohol so will almost always chose it.” “I know my wine choices, how they taste, what if any effect they might have on me.” “Prefer to stick to my tried and faithful wine.” “I know what I like and what suits my tastes, so I stick to that.” **Chance for exploration when on-premise** “I like wine and drinking wine when I'm out gives me the opportunity to try different wines.” “I love to choose different wines when I'm out in different places.”	**Taste and enjoyment** “I enjoy wine. I don't have it always because the quality of wine when I go out is not as good for the price point as I have at home.” “I like the taste and feel of a glass of wine if I know the quality will be good.” **Food pairing** “Can saviour a single drink over a period of time, usually with a meal.” “If I'm eating I will usually drink wine.” **Familiarity and safety** “Know what I'm getting and how much I can drink.” “I tend to drink wine slower than I would if I was drinking any other options.” **Dependent on social and situational fit** Because it's usually an appropriate setting - I'll drink beer at a pub or sports event	**Heavily influenced by situation or mood** “Depends on the place, what I'm out for and the vibe. If I'm planning on dancing and clubbing I find spirits to be more uplifting if I'm enjoying a nice meal at restaurant wine pairs well.” “Usually, if I'm out at some kind of venue, it's a very casual atmosphere, where the fanciest drink I'd choose is a craft beer or some kind of easy to make cocktail. The type of places I'd go and have wine at have been reserved for special occasions or when I have money to spare.” **Competing preferences** “I prefer a cocktail if not eating.” “Beer is my preferred drink, plus fussy drinking wines not familiar with.” **Practical considerations** “I drink less wine on-premise these days because you don't get the same value because you only get a tiny bit in the glass. Beer is the better value option.”	**Strong preference for other beverages** “I prefer other drink taste and wine is annoying to choose from the menu.” “Risk of choosing a bad one, more volume in beer.” “I prefer beer. It's a bit cheaper.”	**Limited drinking when on-premise and preference for other beverages** “I do not drink wine when on-premise because of the increased cost at the place. Wine costs much more because it has to help cover the venue's costs such as wages, lighting, rental, etc.” “I don't drink alcoholic beverages on premises as I still have to drive the car home.” “Because I prefer to drink other alcohol on premise or at a venue.”

18. Why is that? by 17. How often do you choose wine when drinking on-premise? – Source: Square Holes ‘On-Premise Research Online Survey’ 2025

Consumers believed wine to be the best choice when paired with food, particularly during sit-down meals or formal dining, where it enhances the experience

Dining out, especially at higher end restaurants or wine bars, was noted as a common setting where wine is preferred for its compatibility with food and atmosphere.

Respondents also strongly associated wine with specific special occasions and celebrations such as birthdays, weddings, or romantic dates – adding to a sense of festivity.

Many choose wine out of habit or personal preference, often naming it their go-to or only alcoholic drink regardless of scenario.

Others broadly touched on social settings as encouraging scenarios for wine, where it is valued for its shareability and more relaxed pace of consumption. Further to this, there was some mention of wine being linked to relaxation and calm settings. Whether at home or from an on-premise perspective more low-key venues.

"It's the **best choice for small gatherings, at a bar, small restaurant**, tapas, celebrations, functions, weddings, higher end gatherings."

"**Special occasions and celebrations**. Intimate dinners. Certain meals like pasta."

"**Casual catch up with friends, having a meal** at eatery or home, relaxing at night with partner, family catch up."

"Certainly, at **more formal outings or events**. This would also apply depending on the company and venue."

"Depends on what we are doing out - I **normally only drink wine with a meal**."

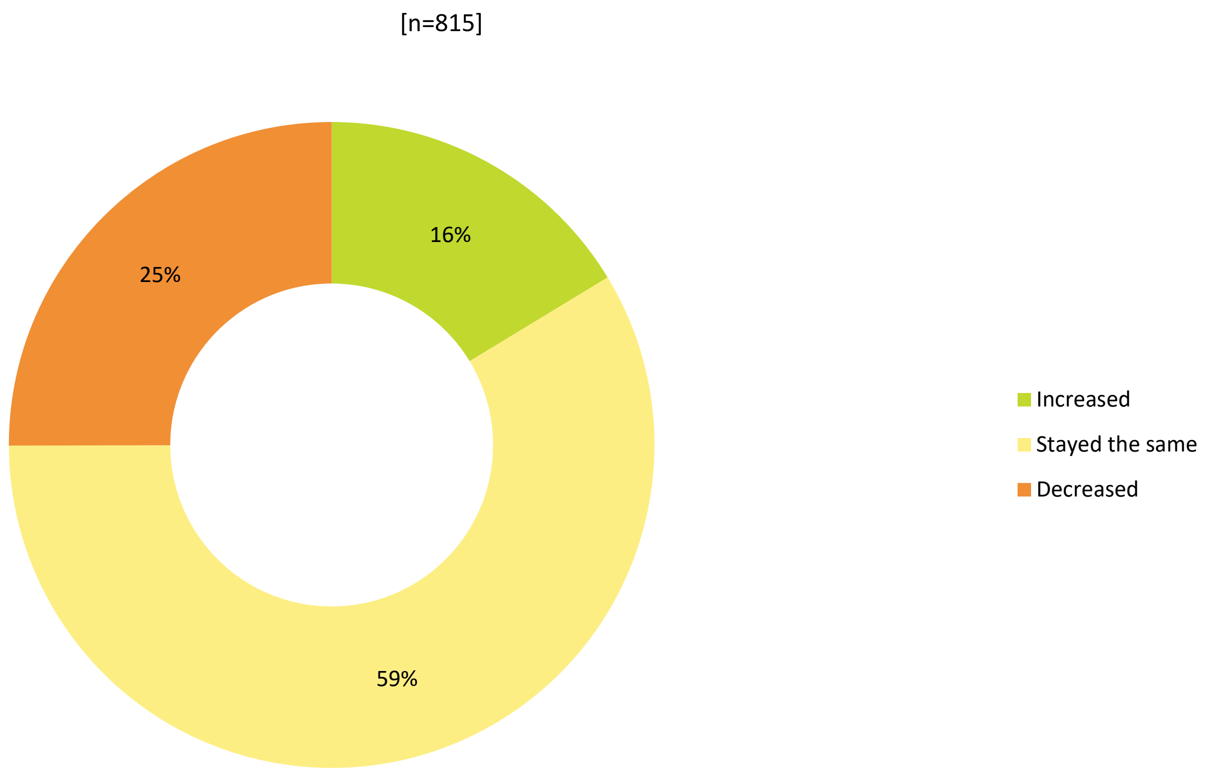
"**Easy to drink** and goes with the venue usually."

"**When you are with friends and we can purchase a whole bottle** rather than by the glass."

Note: select verbatim quotes have been chosen to reflect broader themes

16. In what scenarios do you think wine is the best choice versus other drinks on-premise? – Source: Square Holes 'On-Premise Research Online Survey' 2025

Almost 60% of respondents[1] recorded that their consumption of wine on-premise has remained the same compared to 3 years ago. Whilst a quarter of the sample indicate they're consuming less wine on-premise currently than they were in the past



[1] A breakdown of the sample / respondents can be found In Appendix 5 (Page 113)

20. Would you say your consumption of wine on-premise has increased, decreased or remained the same compared to 3 years ago? – Source: Square Holes 'On-Premise Research Online Survey' 2025

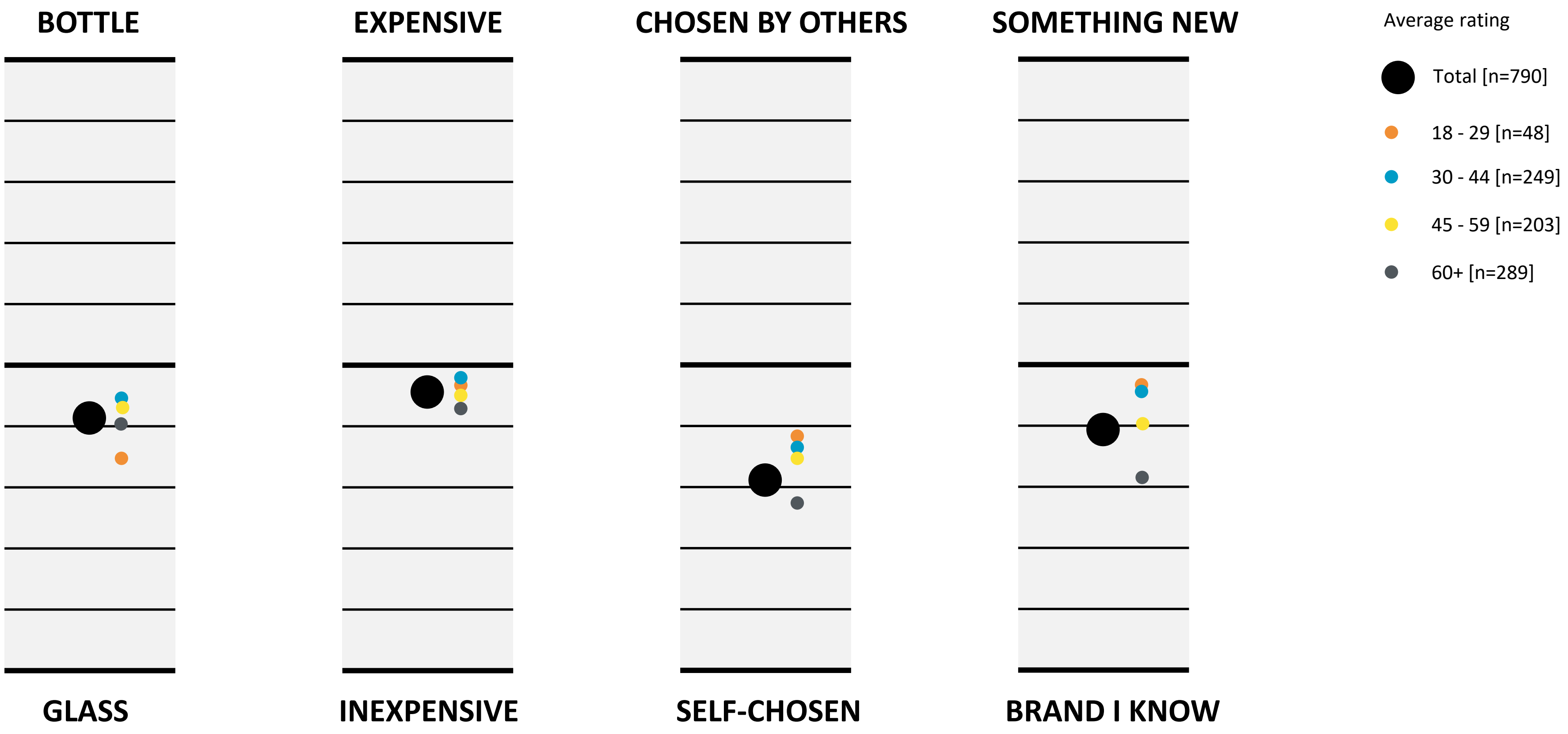
Rationale behind on-premise consumption habits

[Note: select verbatim quotes have been chosen to reflect broader themes]

Increased (16%)	**Decreased** (25%)
Aging and changing taste preferences “It's an easier choice, my tastes have changed evolved as I've gotten older and I tolerate wine better than other beverages (beer - bloat and cocktails - headaches), it feels more sophisticated and enjoyable and its cost isn't huge.” “I think as I've got older, I tend to enjoy it more.”	**Rising cost and financial pressures** “The price of low-quality wines offered has gone up and there are less options by the glass. I also go out less often as I can enjoy wine at home without the crowds.” “The cost of a glass of wine has increased dramatically over the past three years. Instead of drinking two glasses at functions or restaurants I now opt to drink just one glass of wine.”
Lifestyle and social changes “Feel like I am going to more casual dinners so wine is a choice. I used to go to more clubs and I would only drink spirits there.” “More opportunities to drink out/have meals with drinks which wine suits.”	**Reduced socialising and dining out** “I am going out less due to less social activities being on offer. Friends have had children, so they don't go out as frequently. Cost of living has increased dramatically and it's too expensive.” “I don't go out to restaurants as much now.”
Improved perception and enjoyment of wine “I have discovered wine brands I enjoy.” “More wine available that's enjoyable.”	**Health and lifestyle changes** “I am drinking less with a young family and exercising and running more. Alcohol doesn't fit in that lifestyle. It's also expensive.” “More conscious of my health.”

21. Why is that?1 by 20. Would you say your consumption of wine on-premise has increased, decreased or remained the same compared to 3 years ago? – Source: Square Holes ‘On-Premise Research Online Survey’ 2025

Whilst typical wine ordering habits fall mostly towards the middle of the prompted scales, there is a skew towards, by the glass, inexpensive, self-chosen and familiar brand selections. Comparing by age, those in the 60+ cohort show a greater lean towards self selection and brand familiarity, whilst 18 – 29-year-olds are most likely to favour by-the-glass options.



23. Thinking about your typical wine ordering habits, where would your decision making usually fall for… – Source: Square Holes 'On-Premise Research Online Survey' 2025

The quality and range of the wine offering is the most significant factor in wine selection decision making (this being consistent across age groups). Wine list and information about the wines also observes strong importance in the selection choice. Both the importance of staff knowledge and perceived wine expertise of the venue decreases with age

Column %	Total	18 - 29	30 - 44	45 - 59	60+	Always	Often	Sometimes	Rarely
The quality and range of the wine offering	78%	81%	79%	72%	81%	85%	83%	75%	57%
Wine list and information about the wines	68%	69%	72%	67%	64%	75%	72%	64%	49%
Wine promotions or specials	56%	56%	57%	63%	52%	53%	63%	50%	55%
Staff knowledge and helpfulness	52%	65%	59%	50%	44%	56%	54%	50%	39%
Perceived wine expertise of the venue	40%	56%	54%	38%	27%	40%	43%	39%	26%
Column n	789	48	249	202	289	111	341	271	66

Note: In this chart, green shades represent higher levels of response selection, while red shades indicate lower levels of response selection. The intensity of the colour reflects the frequency of selection

24. How important are the following factors in your wine selection decision making when on-premise? – Source: Square Holes 'On-Premise Research Online Survey' 2025

Observations in changes to wine consumption on-premise

Majority of respondents have noticed no change in the way themselves or others consumer wine in on-premise venues.

For others, there was strong feedback of drinking less wine and less overall due to cost of living, venue price increases, health consciousness and reduced on-premise socialising.

Several people mentioned a shifting preference for ordering wine by the glass, due to price, consumption habits and desire to explore. Value for money was also of interest to some, with some commenting on the perceived high markup of wines at venues which can lead to an avoidance of wine.

"No change but **wine by the glass over a bottle** due to cost."

"As we age, we are less likely to order bottles - **more by the glass because as we all settle in to our preferred choices unless it's a Prosecco or sparkling** for a celebratory occasion."

"There's been a **big shift towards more variety. People aren't just sticking to the same old classic wines**. They're eager to try out new and unique varieties from different regions in Australia and around the world."

"Where a bottle might previously have been ordered, I **now tend to buy a glass**."

"I **changed the amount I will consume on premise**, I will drink less on premise due to price."

"Mid range choices and **cheaper aren't good value for money** like they were."

27. Have you noticed any changes in how you or others consume wine in on-premise venues? – Source: Square Holes 'On-Premise Research Online Survey' 2025

More affordable wine options was consistently selected across age groups, whilst promotions and opportunities to sample was most appealing to those aged 18 – 29. Non-tradition wine styles were more encouraging for those aged 44 and under and had limited appeal to older age cohorts

Column %	Total	18 - 29	30 - 44	45 - 59	60+	Always	Often	Sometimes	Rarely	Never
More affordable wine options	47%	47%	44%	50%	48%	43%	53%	47%	40%	12%
Promotions or wine specials (e g , happy hour, wine nights)	33%	45%	35%	38%	28%	31%	42%	29%	25%	4%
Opportunities to sample or taste before ordering	31%	47%	33%	34%	25%	32%	38%	29%	15%	8%
Food and wine pairing suggestions on the menu	28%	39%	33%	27%	23%	23%	32%	30%	15%	4%
Clearer, easier-to-understand wine lists	20%	22%	31%	17%	13%	20%	24%	20%	7%	4%
Staff who are knowledgeable and can make recommendations	17%	31%	24%	14%	12%	21%	20%	16%	12%	0%
Loyalty cards or similar programs	17%	22%	16%	21%	14%	20%	18%	17%	10%	0%
More non-traditional wine styles (e g , chilled reds, natural wines, wine cocktails)	14%	20%	25%	9%	8%	11%	16%	15%	10%	0%
More information or storytelling about the wine (e g , region, winemaker)	12%	16%	19%	12%	5%	11%	13%	13%	7%	4%
Something else	6%	0%	2%	2%	14%	10%	4%	5%	12%	32%
Unsure	12%	4%	6%	12%	18%	8%	8%	13%	21%	44%
Column n	815	49	253	211	301	111	341	271	67	25

Note: In this chart, green shades represent higher levels of response selection, while red shades indicate lower levels of response selection. The intensity of the colour reflects the frequency of selection

28. What would encourage you to order wine more often in on-premise venues? – Source: Square Holes 'On-Premise Research Online Survey' 2025

Appendix 2: Additional industry stakeholder interview findings

Trade response to wine's changing role on-premise

Wineries Shifting from production first to consumer first	**Distributors** Bridging the gap between supply and venue needs	**On-premise** Simplifying, upskilling and experimenting
Strategic shifts 1. **Product innovation**: Launching lighter styles, spritzers, flavoured and low-alcohol wines to attract younger, health-conscious consumers 2. **Format flexibility**: Offering cans, small bottles and wine on tap for convenience and casual drinking occasions 3. **Direct engagement**: Boosting venue presence through tastings and training to enhance consumer connection **Addressing challenges** 1. **Partnering with distributors** to trial new formats and by-the-glass strategies 2. **Listening more to consumer and venue feedback** rather than just pushing production-based portfolios 3. **Moving away from legacy SKUs** toward venue-specific or commercially driven offerings – value, health, experience etc	**Strategic shifts** 1. **Tailored solutions**: Co-developing private labels, venue-specific SKUs and house wines aligned with venue operations and commercial goals 2. **Smart serving formats**: Promoting tap wine, cans and by-the-glass programs to improve ease of service and profitability 3. **Trade support**: Offering tools, cheat sheets and flavour-led guides to boost staff confidence and sales **Addressing challenges** 1. **Acting as advisors,** not just sellers helping venues understand what sells and why 2. **Filling in the support gap left by wineries** (e.g., offering basic wine training or activation) 3. **Advocating for better data** and feedback loops to inform smarter decisions	**Strategic shifts** 1. **Simplifying wine lists**: Moving toward occasion-led menus instead of traditional region / varietal breakdowns 2. **Staff empowerment**: Using cheat sheets, pairing tips and simple scripts to help new / younger staff make confident recommendations 3. **Experimenting**: Trialling wine spritzers, chilled reds and lighter styles, especially in casual and suburban venues **Addressing challenges** 1. **Shifting focus to food-led and regional venues** where wine has a natural place 2. **Being selective with wine partners** favouring brands that offer support, flexibility, or co-promotion 3. **Working around lack of training or data** by relying on trial, word-of-mouth, or best-performing SKUs

“People aren't giving up on wine… [one of my daughter’s friends brought over a bottle of Brio and I asked why], she said, because it had a neck tag on it that said it makes a really great Aperol spritz. **That's a smart wine business that's got a consumer orientation and they’re making something that consumers actually want to drink and they're creating an occasion, they're telling her how to drink it, what to do with it and making it super easy for her. And this happens in restaurants too**… What do you do when you're 25 and you open a wine list and there's this many Chardonnays and one's $50 and one's $500. How do they know the difference? And the only thing that we are giving them to go on is regionality and vintage and a producer's name that nobody recognises. Everything that the industry uses to differentiate by consumers have got no idea about. We've got a real product problem in terms of not necessarily presenting the product to the market in a way that's particularly understandable for the consumers.”

On-premise venue

Engaging younger consumers through product innovation

Younger consumers, particularly those under 40, are believe to be engaging less with wine than previous generations. This is not due to disinterest in the product itself, but rather a perception that wine is complex, traditional and less accessible than alternatives like cocktails, spritzers and ready-to-drink (RTD) beverages.

To better connect with this audience, interviewees suggested that the wine industry consider more approachable formats and styles. Spritzers, chilled reds, flavoured wines and lower-alcohol options align with current preferences. Smaller formats—such as cans and 200ml bottles—offer convenience and suit casual, lower-commitment occasions.

Modernising wine in this way doesn't mean compromising quality. Instead, it's about presenting wine in formats that resonate with a new generation—encouraging trial, enhancing relevance and helping the category compete in a changing drinks landscape. In turn, producers and venues can encourage trial and increase relevance.

"We're seeing some really **big trends of groups of young women coming out and dining and they're not necessarily being frugal around what they're doing, but they're definitely looking for that kind of experiential take on dining**. "

On-premise venue

Streamlining wine selection to boost sales

Wine is often perceived as a complex choice, particularly by consumers unfamiliar with varietals or regional classifications. This complexity creates friction at the point of sale—discouraging trial and making it harder for staff to recommend with confidence. In contrast, other categories like beer and cocktails succeed by offering simplicity, fun and clear, relatable descriptors.

Simplifying wine lists by highlighting flavour profiles instead of technical terminology makes wine more approachable. Staff are more likely to recommend wines they understand and customers are more inclined to try something that sounds familiar and inviting. Supporting tools—such as visual cues, QR codes, or table talkers—can help close the knowledge gap without requiring intensive training.

A confident recommendation at the table or bar can make wine feel more accessible, increasing engagement and conversion across a broader audience.

“People don't want to be bombarded by too much information, but **some simple descriptors around this is what this wine's about would be very helpful**.”

Investor

Aligning wine solutions with venue and channel needs

Venues today expect wine options tailored to their operational realities - whether that means private labels, smaller formats, or wine-on-tap systems. Standard retail offerings often don't suit the margin structures, service speed, or flexibility required in the on-premise environment. When wineries and distributors co-create flexible, fit-for-purpose solutions, they consistently see stronger engagement from the trade.

By-the-glass offerings, venue-exclusive labels and efficient packaging formats give venues both commercial advantage and creative control. These models also allow wine to compete more effectively with beverage categories - like spirits and RTDs - that are already optimised for speed, volume and profitability.

"**It is about product consistency, having things that are recognisable for people** and if we do introduce them to something new, it's about being able to continue to have that product on for a decent period of time."

On-premise venue

Strengthening wine engagement through storytelling

Modern consumers want more than just a product—they're looking for meaning, connection and authenticity. While wine is rich in heritage, it often struggles to engage younger audiences who prioritise relatability and lifestyle over tradition. Spirits brands have been more successful in this space, leveraging culture, storytelling and digital engagement to stay top of mind.

Wine has powerful stories to share—about regions, people, sustainability and craft—but these need to be communicated in ways that resonate with today's drinkers. This means moving beyond technical language and embracing visual content, social platforms and immersive in-venue experiences that bring wine to life.

By focusing on authenticity, simplifying the message and positioning wine as part of a modern lifestyle, producers and venues can build stronger emotional connections and drive greater engagement, particularly among younger consumers.

"**One thing that helps consumption is how you can get your messaging across. That might be on a wine list in a restaurant; it might be standup table talkers at a bar. Yes, the consumer has a phone but have something that is jumping out at them. There might be a feature brand where there's a bit of history about them to give that educational piece. There might be a fun element, for example in a hotel lobby bar**, a bit of an aperitivo type hour, but link it in with more Mediterranean style wines. Those sorts of things are definitely having an impact. The other one, which spirit companies do particularly well is the activations, creating some more events to give people an experience that's not just having a glass of wine."

Distributor

“**Wine ceremony is fairly traditional and in fact, outside of putting a bottle in an ice bucket and pouring it into glasses, it's pretty standard as far as how the category goes**. Wine hasn't innovated necessarily on a product level but also hasn't innovated on a ceremony level to bring in people who might not be engaged by the traditional.”

Winery

What themes from interview discussions mean for different stakeholders

	Wineries	Distributors	On-premise venues
Relationships drive resilience	Need direct, strategic relationships with venues to maintain relevance and influence in a consolidated trade	Strongest results come from venue-specific support, not generic sales	Value suppliers who understand operational realities and support with tailored, profitable wine solutions
Consumer shifts are forcing a rethink	Younger drinkers demand lighter styles, smaller formats and storytelling that feels modern and relatable	Product mix shifting to spritzers, wine-on-tap and social-friendly formats to meet changing expectations	Customers are choosing drinks that are fun, fast and easy to understand—wine must compete on those terms
The barrier is in execution, not interest	Great wine is available, but complexity and lack of trade activation hinder trial and performance	Wine sells when staff have tools and confidence—execution matters more than prestige	Wine underperforms without staff support and simple menus; confidence and clarity are essential to sales

Appendix 3: Additional consumer focus group findings

"I've definitely noticed that restaurants nowadays seem to be absolutely over and above inflation, taking a lot on glasses of wine and so much so that now I'm considering, 'Well I can spend $18 on a standard glass of wine, or I can spend $24 and buy myself a martini'… **Because at some point the cost benefit analysis against having a cocktail doesn't make sense**."

Affinity Group One, Aged 18 – 29, Sydney

Where do different alcohol types fit?

	Gen Z	Millennials
Wine	Mainly chosen for meals, relaxed catchups and settings where the group is seated and engaged. It feels appropriate when dining or wanting to appear more mature based on the people or setting (like family, work, or dates).	Seen as a natural fit for meals, especially at restaurants. Wine is part of the dining experience with partners, family, or close friends and often chosen for quality over quantity with growing awareness of moderation.
Cocktails	Preferred for their flavour, presentation and perceived value especially when the ingredients are visible, or the drink feels special. Often chosen during nights out, birthdays.	Chosen for socialising, celebrating, or when seeking variety. The group view cocktails as more indulgent and suited to occasions where they want to enjoy the drink itself as much as the setting.
RTDs / Spirits / Others	These are the go-to for pre-drinks, casual rounds with friends and nights at pubs or clubs. They are quick, familiar and easy to consume. Ideal for fast-paced, high-energy environments.	Often chosen in casual or pub environments, or after work when wine feels too heavy or expensive. Beer and cider emerged as convenient options especially when ease and familiarity are priorities.

This **customer persona** was developed from direct conversations with consumers. It captures recurring motivations, behaviours, and pain points, offering a representative snapshot of a key customer segment to help support more informed decisions across product, marketing, and experience strategy

Ruby

Young social urbanite

Age: 28

Location: Inner city Sydney

Occupation: Lawyer

Living situation: Renting with housemates

"I love wine when it's part of an experience—great food, good company, the right vibe. It's not about drinking more; it's about drinking better."

VALUES

- Experiences over excess
- Health and wellness
- Socialising and connection

LIFESTYLE

- Socially active but becoming more selective about nights out – enjoys catching up with friends, both during weeknights and weekends
- Prioritises venues with atmosphere, aesthetics and value

BARRIERS TO WINE CONSUMPTION

- Concerns over price vs. value proposition – particularly with competition from similarly priced cocktails (will consider the alcohol per volume of drink options and also finds it is easier to track her standard drink consumption when not drinking wine)
- Wine perceived as too 'heavy' or not suited for long or fast-paced nights out
- Generally other drink options appeal to her tastes more than wine does

ALCOHOL AND WINE BEHAVIOURS

Drinks alcohol: Yes – socially and moderately more often on-premise. Occasional 'fun' or nights of excessive alcohol consumption

Alcohol preferences: Vodka soda, white wine and cocktails. Now avoids overly sweet wines (e.g., Moscato) after that was her entry point into the category in her early 20's

Wine usage: Wine is for food pairings, celebrations (e.g., birthdays), relaxed dining, or wineries / winer bars. Prefers wines she can sip and enjoy – typically by the glass (for price and portion control) unless in a large group setting with people who are wanting to share a bottle. Willing to explore different varieties but relies on menu or staff guidance for selection. Often chooses wine based on price / value in the absence of brand familiarity

Wine consumption occasions: Celebrations, winery outings, restaurants / dining. Less common to drink wine at pubs (perceived lower quality) or clubs – never at crowded or high-energy venues, unless prompted by a venue promotion such as bottomless brunches. Wine is less likely to form part of longer drinking sessions.

Evolving preferences: Previously drank to get drunk, now more conscious of intake and drinks to enjoy / socialise. Sees wine as part of a food, relaxed or celebratory experience – not necessarily a standalone long night-out beverage

HOW TO REACH RUBY

Channels: Social media (Instagram, TikTok). Venue-driven promotions (e.g., wine nights, staff picks etc.). On-premise wine events and tastings

Triggers to purchase: On-premise cues and promotions to drink wine, staff recommendations and guidance and food pairing suggestions

Innovation ideas: Single-serve premium cans or mini bottles with appealing designs, less traditional product offerings such as Lemon infused prosecco (or other flavoured alternatives)

“I do find it can be sometimes overwhelming if it's a really big menu, especially when you haven't heard of the regions or the names and that sort of thing before, that's when I would definitely be going to the wait staff and asking for their opinion. But I think given our age, for me personally, if you go into a restaurant and the cost of the wines are really expensive or they only do it by the bottle and not by the glass and you don't have intentions of buying a bottle that night, it is a bit of a deterrent to ordering a wine. It is very annoying when they barely have anything by the glass. It seems very common.”

Affinity Group One, Aged 18 – 29, Sydney

Oliver

Social explorer

Age: 39

Location: Metropolitan Adelaide

Occupation: Teacher

Living situation: Lives with partner

"I enjoy a good bottle at home or out with friends - but if I'm ordering wine at a venue, it's got to feel worth it. I'm happy to try something new when I'm out if it's recommended, but I don't want to risk average for premium prices."

This **customer persona** was developed from direct conversations with consumers. It captures recurring motivations, behaviours, and pain points, offering a representative snapshot of a key customer segment to help support more informed decisions across product, marketing, and experience strategy

VALUES

- Strong sense of social connection through friendships and time with his partner
- Supporting local
- Quality over quantity

LIFESTYLE

- Eats out regularly and often engages with on-premise activities involving alcohol such as trivia nights, wine bar dates and functions
- Budget conscious but still spends on quality social occasions
- Enjoys discovering new drinks or producers

BARRIERS TO WINE CONSUMPTION

- Oliver enjoys drinking quality bottles of wine at home with his partner or with friends when having get togethers. This makes him hyper conscious of the value and mark ups prevalent for wine on-premise – limiting his desire to purchase, particularly by the bottle
- Certain venues have limited or pricey by-the-glass options which reduces his interest in ordering wine

ALCOHOL AND WINE BEHAVIOURS

Drinks alcohol: Yes – multiple times per week at home and at least a few times a month on-premise. Drink for enjoyment, socialising and to enhance the occasion

Alcohol preferences: Enjoys a variety of beverages including wine, beer, cocktails and spirits. Wine is often the default but depends on occasion, mood and venue

Wine usage: Drinks wine frequently at home and often when on-premise as he loves the taste. He has a strong wine knowledge and appreciation for different varieties

Wine consumption occasions: Wine suits most occasions but particularly when dining out or at functions such as weddings or specialised venues such as wine bars

Evolving preferences: Has been interested in the rise of natural, chilled reds and light-bodied wines but has certain brands / varieties he'll look for whenever he's on-premise (for familiarity and safety). Often more selective and quality conscious. Enjoys trying new brands and finding new 'favourites' when supported by trusted information sources

HOW TO REACH OLIVER

Channels: Social media (Instagram). Venue-driven promotions and on-premise wine events

Triggers to purchase: Food pairing suggestions on the menu, on-premise cues (e.g., signage and menu highlights), wine on happy hour or daily specials, friend's recommendations, curated experiences

Innovation ideas: Wine sampler flights / tasting boards, venue driven discovery experiences (e.g., curated wine lists with unique offerings)

“You go to a micro brewery, they'll offer you a taste of anything you want before you actually buy. I think that's probably one of the best [motivations]. **It’s the reason pubs don't put a whole lot of [variety on their menus], they're not going to sell a Tempranillo because nobody knows what a Tempranillo is. Getting people tasting that sort of stuff somehow is probably the best way to do it.**”

Focus Group Two, Aged 30 – 49, Mixed States

Appendix 4: Ethnography – Observations of consumers when on-premise

Overview

The following section summarises an ethnographic / observational analysis of on-premise venues. Around 15 hours was allowed for visiting venues (in-person) for observation, talking to key staff (sommelier when available and waiting / bar staff), photos, reviewing menus and note taking. In Melbourne LUCAS Restaurants Head of Wine Loïc Avril gave Jason Dunstone a tour of venues and discussed key themes, trends and strategies related to wine and the broader business. The more immersive on-premise visits were skewed to restaurants / wine bars to allow a deeper analysis of wine skewed venues. A digital analysis was also conducted to allow for a wider on-premise observational analysis. It is worth noting that the notes below are often generalisations, based on the venues visited and even in each type of venue there are notable differences.

Site	Location	Type	Observation	Site	Location	Type	Observation
AALIA	Sydney	Restaurant (formal)	In-person	Landscape	Hobart	Restaurant (formal)	Online
Agnes	Brisbane	Restaurant (casual)	Online	Maison Batard	Melbourne	Restaurant (formal)	In-person
Anchovy Bandit	Adelaide	Restaurant (casual)	Online	Mister Sunshine	Adelaide	Café	Online
Arkhé	Adelaide	Restaurant (formal)	Online	Myrtle Wine Bar	Melbourne	Wine Bar	Online
Bath Hotel	Adelaide	Pub	Online	Newport	Sydney	Pub	Online
Ballaboosta	Adelaide	Café	Online	Old Fitz	Sydney	Pub	Online
Central	Brisbane	Restaurant (casual)	Online	Osteria Oggi	Adelaide	Restaurant (formal)	Online
Chin Chin	Melbourne	Restaurant (casual)	In-person	Peppina	Hobart	Restaurant (casual)	Online
Dier Makr	Hobart	Restaurant (formal)	Online	Saint Peter	Sydney	Restaurant (formal)	In-person
Dry Dock	Sydney	Pub	Online	Society	Melbourne	Restaurant (formal)	In-person
Essa	Brisbane	Restaurant (casual)	Online	The Boundary Hotel	Brisbane	Pub	Online
Exhibition	Brisbane	Restaurant (formal)	Online	The Gully	Adelaide	Pub	Online
Franklin Wharf	Hobart	Restaurant (casual)	Online	The Old Seven	Brisbane	Wine Bar	Online
Grana	Sydney	Restaurant (casual)	In-person	Tigra	Sydney	Wine Bar	In-person
Grill Americano	Melbourne	Restaurant (formal)	In-person	Uraidla Hotel	Uraidla, SA	Pub	Online
Jane	Sydney	Wine Bar	In-person	Vogue Cafe	Sydney	Restaurant (casual)	Online
Julilee Hotel	Brisbane	Pub	Online	Woodcut	Sydney	Restaurant (formal)	In-person
Koala Tavern	Brisbane	Pub	Online	Yakimono	Melbourne	Restaurant (casual)	In-person

Pub

Observations:

Core patron focus is on socialising and beverage choice is more so personal, i.e. some in a group may have wine, others beer or spirits / cocktails. Lower expectation of quality wine or staff expertise. May share a bottle of wine, but whether a bottle or glass often pubs and clubs are more so about trying what they know (variety, region and/or brand), with less desire to experiment. Wine is not the default.

Barriers:

Staff tend to have less wine knowledge or are not believed to have, so are not asked for advice. Value for money can be more of a decision driver and there is less desire to take risks. Venues help with socialising, not necessarily wine choice. Visitors are not necessarily planning for wine.

Opportunities:

Ensure lower risk wines at a good value price are available and prompt on drinks menus and elsewhere that staff are available to help or encourage. How can customers feel comfortable asking for advice, better menus or help in picking a wine – “would you like to taste …?”

Koala Tavern, Brisbane

The Boundary Hotel, Brisbane

Bath Hotel, Adelaide

Café

Observations:

While cafes are often coffee focused, those offering food and alcohol offerings are less so premium choices than easy access. Wine is often not the default. Staff are less likely to provide advice and while drinks menus may provide a good selection of wines by the glass and bottle, care is taken to have value for money and well-known brands with low risk

Barriers:

Cafes are not always viewed as a place to consume wine and the casual nature means that they may opt for no alcohol or patrons each get whatever they prefer, be this a glass or wine, beer or soft drink. Customer do not tend to ask for wine advice from staff.

Opportunities:

Understand the needs of café managers and their customers. For example, provide marketing assets to the venue for tables, counter and walls to promote wine brands. It is quite normal to promote brands in order to build awareness and encourage purchase. Wine as a fast moving consumer product is quite acceptable in a café as it helps make decisions.

Ballaboosta, Adelaide

Mister Sunshine, Adelaide

Wine bar

Observations:

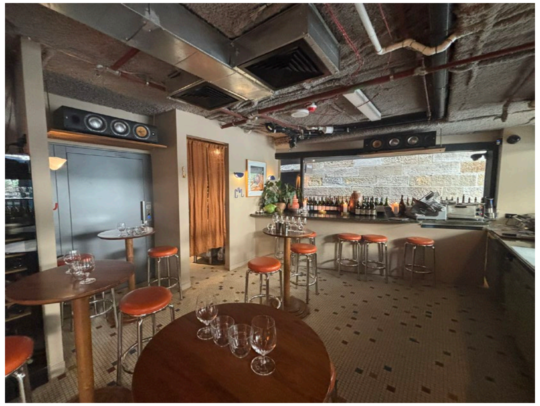
Clear visual cues that this is a place to try and explore wine and patrons have been primed prior that they will be trying wines that they may have not tried before, often by the bottle with friends, by the glass for something new, or even a taste offered by the knowledgeable venue staff making wine fun or just passionate to educate (sell). Often clever youth aligned owners / design.

Barriers:

There is so much choice, so some patrons may find themselves intimidated trying different wines and risk trying something they do not like. Staff can both be a motivation and barrier, for example too pushy to try another wine that may be at a higher price. Balancing the sales and positive vibe is tricky.

Opportunities:

Ensure staff are well trained in wine and other wine bars support in this. Often wine bars do their own training, rather than formal, to encourage staff to be passionate and help sell wine to customers. Training is a critical part of the business model. Wine menus also play an important role, making it easy to find a wine the customer would like to try and different price options.



Tigra, Sydney

Jane, Sydney

Myrtle Wine Bar, Melbourne

The Old Seven, Brisbane

Restaurant – casual dining

Observations:

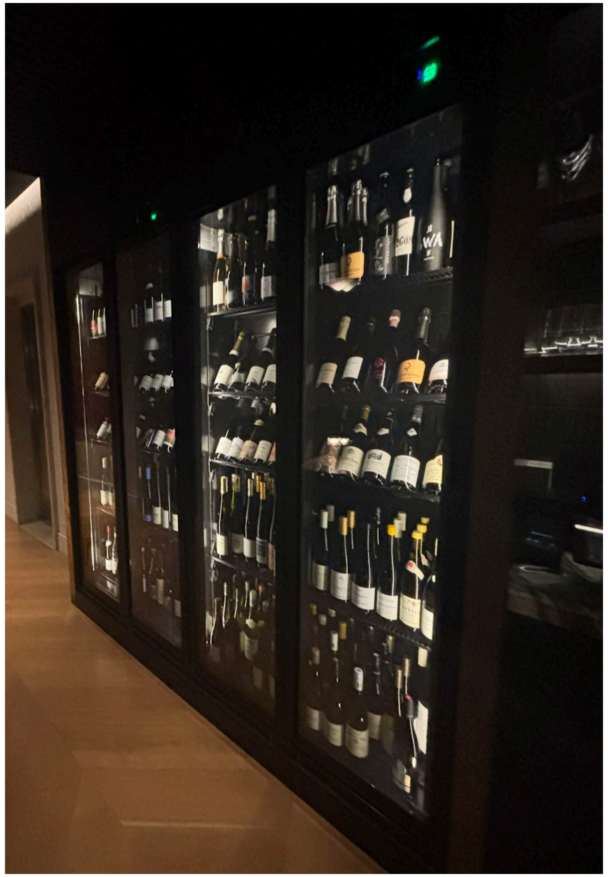
Likely to be visited more often than higher end restaurants and the model, design, menus are often about faster paced dining with a wide choice of food and drink options. While wine is prominent, the more relaxed, fun nature of casual dining may encourage cocktails, a beer or other wine alternative.

Barriers:

The average customer spend at casual dining is typically lower than higher-end restaurant and value of premium wine may be compared with alternatives such as cocktails. Casual dining often place cocktails earlier in the drinks menu, before wine, to start the night off. Wine doesn't immediately offer an experience. Some customers may not drink or may drink less than at a more formal restaurant.

Opportunities:

The ability for staff to support customers in choosing wines is important. Staff often have wine knowledge, without formal training. Patrons may be lacking wine knowledgeable, so having staff helping to make the right wine choice is key. Ensuring that wine is easy to select via value for money, food pairings and ensuring that wine is an important aspect of the dining experience is important.



Restaurant – formal dining

Observations:

Formal restaurants closely align the premium dining experience with wine. While wine is often not overtly displayed, there are visual cues from wine buckets, to bottles on other tables, staff serving wine and large wine menus, that wine is the default alcoholic beverage of choice. This is an occasion of celebration, or higher end relationship building, so spending a bit more of wine and relaxing with friends, family and colleagues is planned ahead.

Barriers:

Cocktails are increasingly becoming the default to start and even continue into the dinning experience. Restaurants are placing cocktails early in the menu and they are clearly being promoted as part of the experience, before moving on to wine by the glass or bottle. Wine menus are including alcohol free alternatives and no-alcohol is more socially acceptable, particularly when corporate credit cards are increasingly disallowing or limiting alcohol.

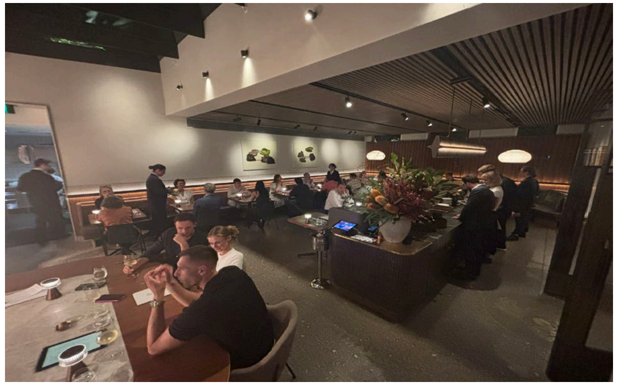
Opportunities:

Ensure that wine remains a critical part of the premium dinning experience. Making it easy to try a premium or new wine by the glass prior to ordering a bottle. More formal sommelier training and support to help sell the benefits. Menus are a valuable risk reducer for customers and many do it very well.

Maison Batard, Melbourne

Society, Melbourne

Woodcut, Sydney



Saint Peter, Sydney

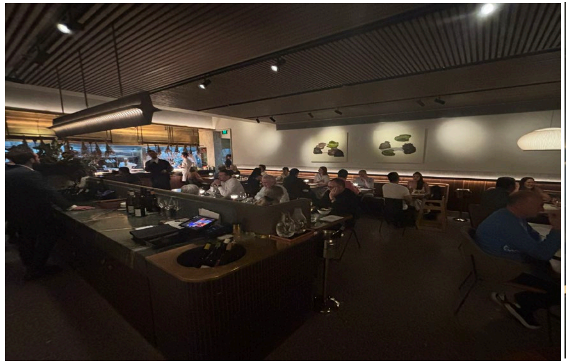
Premise design

	Pub	Café	Wine bar	Restaurant (casual dining)	Restaurant (formal dining)
Layout	Open, flexible space; standing areas; dance floor in some	Compact, informal; mix of counters, tables, depending on café	Intimate zones; wine displays integrated; focus on ambiance	Functional layout; efficient table use; open and often noisy and social	Structured and segmented; private areas or booths; designed for dining
Bar	Central, dominant; focus on beer/cocktails; rarely wine-oriented	Small service counter/s; coffee-focused; wine rarely default	Sleek, stylish wine bar; designed for interaction, socialising and tastings	Integrated bar near entrance or service zone; limited wine visibility	Discreet, refined bar or wine station; sometimes separate sommelier area
Tables	High tables, communal seating, standing areas. Mixed options	Small tables for small to larger groups; cozy setups for work or reading. Generally fast turnover	Small round tables or bar tables; often 2–4 max; set for busy wine service	Mix of long tables and group tables; quick turnaround, informal style	Linen-covered tables; formal place settings; designed for slow dining



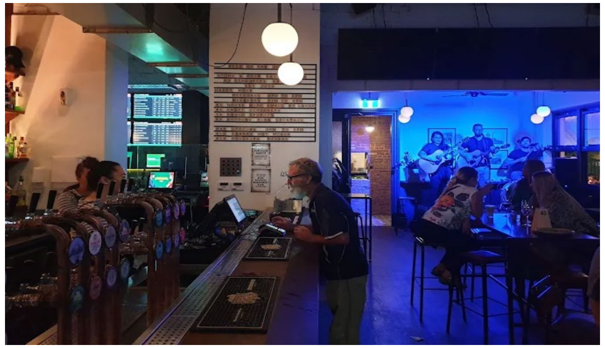

Customer profile

	Pub	Café	Wine bar	Restaurant (casual dining)	Restaurant (formal dining)
Demographics	Wide range, depending on pub, professionals; mixed gender; groups	Wide range, couples, families, solo visitors; some older regulars	Mid 20’s plus, youthful vibe; professionals, wine-savvy individuals; often couples or small groups	Broad mix (families, friend groups, working professionals); diverse ages	30s–60s; affluent professionals, skewed older, business diners
Group size	Small to medium (1–6+); social and mixed-gender groups	Solo or pairs; informal socializing, solo work, quick meals	Small (generally 2–4); couples, friends, solo tasters	Small to medium (generally 2–6); family meals or casual catchups	Small to medium (2–4); couples or formal business meals
Occasion	Informal catch-ups, weekend / evening socialising, celebrations	Casual meetups, coffee + light food, working or reading	Wine tasting, catching up, date nights, post-work unwind	Everyday dining, informal celebrations, casual meals	Special occasions, fine dining, formal celebrations, anniversaries, business



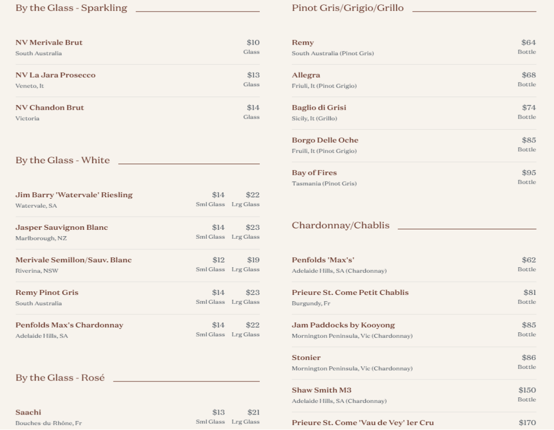

Staff interactions

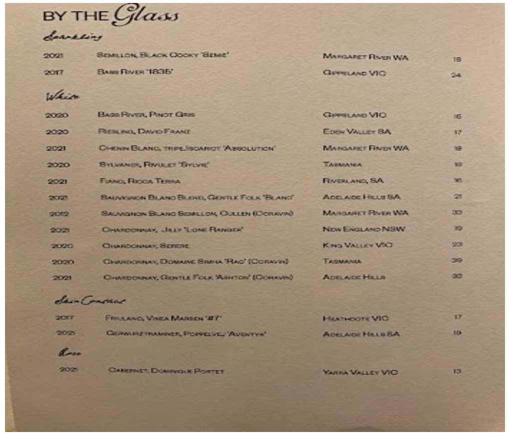
	Pub	Café	Wine bar	Restaurant (casual dining)	Restaurant (formal dining)
Location	Mostly behind bar; circulating in busy hours, collecting glasses and plates	Stationed behind counter; some table service; collecting used cups / plates	Actively moving between bar and tables; visible and engaged	On-floor presence varies; staff multitask between tables and bar	Highly visible table service; often include dedicated sommelier/s
Role	Generalist / functional staff often young; serve drinks and service bar	Barista/server hybrid or separate roles; focus on quick service	Wine-focused staff; some venues have sommeliers, educate and sell wine	General service staff; few specialised roles; focused on customer experience	Clear role distinction; server, sommelier, manager – clear roles
Expertise	Limited; basic knowledge of wine; not expected to offer wine advice	Very limited or no wine expertise; generally no role in guiding wine	Good knowledge; can be actually limited, offer advice, wine storytelling	Varies widely; some basic training, but often limited to menu familiarity	High expertise expected; trained in pairings, regions, service rituals

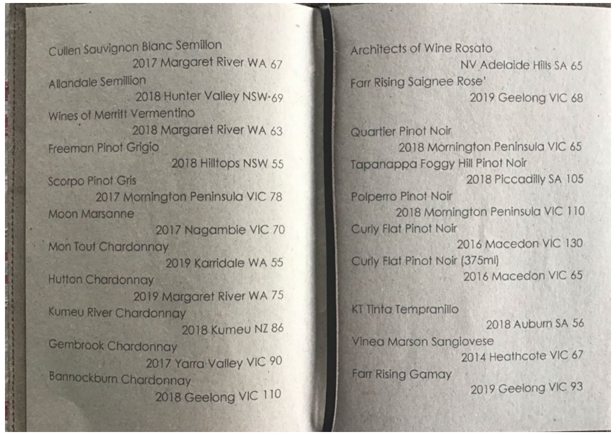



Menus

	Pub / club	Café	Wine bar	Restaurant (casual dining)	Restaurant (formal dining)
Drinks menu	Simple menu depending on venue focus - menu offers limited wines	Basic drinks menu, easy access. Depends on venue focus	Dedicated wine list or board; the main feature of the menu	Wine has its own menu; designed for accessibility and experience	Formal wine list or separate wine menu; professionally curated
Wine choice (e.g. Glass and bottles)	Simple list of wines by glass and bottle, value and known brands	Limited: value-based menu glasses and bottles of wine, known brands	Wide range by glass and bottle; includes varietals, vintages, flights	Balanced list by glass and bottle sorted low price to moderate	Deep selection; reserve glass and bottles, local + international
Wine guidance	Simple to allow quick selection – brand, variety, region	Minimal knowledge; wine ordered without context, quick selection	High-level knowledge: staff suggest varietals, regions, pairings	Advice when asked on what goes with food; customer requests	Detailed ‘education’: regions, vintage comparisons, food pairings

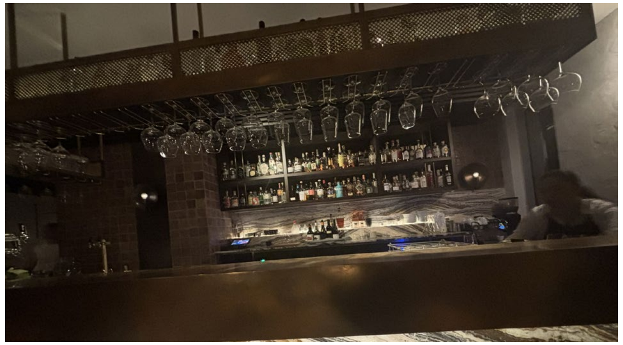






Wine visibility

	Pub	Café	Wine bar	Restaurant (casual dining)	Restaurant (formal dining)
Bar	Wine visible, but not the focus; beer taps dominate; spirits behind the bar	Rarely visible; limited selection behind counter; may have wine specials	Prominent wine displays; open racks, chilled cabinets behind bar	Minimal visibility; limited options tucked behind service counter	Discreet, temperature-controlled storage; table service of wine
Tables	No visible wine service; and groups likely not all drinking same wine	Occasional wine glass or bottle, but not consistent across bar area	Wine bottles often placed on or near tables; part of the experience	House wine bottles may appear on tables; glasses of wine more common	Bottles presented formally, sometimes decanted; glasses set pre-arrival
Other	Branding focuses on beer; limited wine-related décor or signage	‘Chalkboard’ menus or rarely show wine explicitly other than specials	Wall-mounted wine racks, feature walls, tasting menus visibly posted	Wine is part of the offer, but so are cocktails, beer and other options	Wine list integrated into fine dining experience; wine is viewed as default




Wine consumption

	Pub / club	Café	Wine bar	Restaurant (casual dining)	Restaurant (formal dining)
Glass versus bottle	Mostly by glass if wine ordered; bottles less common but friends seeking value	Nearly always by the glass; bottles less common, but if seeking value	Balanced mix; tasting flights, glasses and bottles with groups	Primarily by the glass; bottles for small groups or better value	Bottle service more common; glass also available for pairing courses
Shared wine	Rarely shared; individual preferences.	Uncommon; mostly solo consumption of preferred beverage	Frequently shared, especially bottles and flights among friends	Sometimes shared with meals; bottle sharing occurs in groups	Commonly shared at table; formal bottle presentation and service
Default	Wine not the default sought; personal preference beer, spirits, wine	Wine ordered passively if convenient; rarely discussed	Wine is the main attraction; customers ask discuss and debate	Some interest in wine; often guided by staff or chosen for convenience	Actively sought with intent; diners ask for pairings, recommendations




Appendix 5: Research methodology and approach

Methodology & Approach

The research methodology consisted of a series of in-depth interviews held with representatives from various on-premise venues, wineries and distributors across Australia. Interviews explored emerging trends in alcohol consumption and on-premise trade as well as their perspectives on how the on-premise channel is evolving, including the key demographic, behavioural and experiential factors influencing shifts. Motivations and barriers to wine selection on-premise were also discussed with thought given to strategies and opportunities to help wine producers maintain and grow their presence in the changing on-premise landscape.

Four groups were also held with the general population (i.e., customers) to explore their attitudes towards on-premise visitation and wine consumption. Focus was given to the motivations and barriers to wine selection as well as the influence of occasion and venue type amongst other considerations. Participants were recruited across Australia including Adelaide, Melbourne, Sydney and Brisbane with those aged 18 – 49 being targeted.

Target Audience

Industry stakeholders (on-premise venues, wineries and distributors)
AND General population on-premise visitors (Aged 18 – 49)

In-depth interviews	
Number of interviews	15
Groups interviewed	On-premise venues, wineries, distributors and one investor (Head of Wine and Hospitality Projects)
Interview length	45 minutes
Moderation	Jason Dunstone
Collection dates	4 March – 7 April 2025

Focus / affinity group composition	
Number of groups	4
Groups interviewed	Focus Group 1: Aged 18 – 29, mix of locations across Adelaide, Sydney, Melbourne and Brisbane Focus Group 2: Aged 30 – 49, mix of locations across Adelaide, Sydney, Melbourne and Brisbane Affinity Group 1: Aged 18 – 29, friendship group based in inner-city Sydney Affinity Group 2: Aged 30 – 49, friendship group based in inner-city Melbourne
Group length	90 minutes
Moderation	Jason Dunstone
Location	Focus Groups 1 and 2: Online via Zoom Affinity Group 1: In-home, inner-city Sydney Affinity Group 2: In-home, inner-city Melbourne
Honorarium	Focus Groups 1 and 2: $100 e-giftcard Affinity Groups 1 and 2: $300 e-giftcard to host, $100 to invited friends
Collection dates	18 March – 3 April 2025

Methodology & Approach

An online survey of the Australian general population also formed part of the research methodology. With respondents from Adelaide, Melbourne, Sydney and Brisbane who have consumed wine at once in the past 6 months forming the sample. 815 responses were collected with a spread of responses across locations, age and gender. Data has been reported at the total level, with comparisons made across age, gender and on-premise wine consumption frequency amongst other demographics.

Ethnography (observational research) helped balance the interview, focus group and survey data collected. This involved both on-site and online observations at a range of on-premise venues to capture real-world wine purchase behaviours and contextual influences.

Target Audience

General population (Aged 18+) wine consumers (at least once in the past 6 months)

Online survey	
Sample achieved	815 South Australia: 200 Victoria: 205 New South Wales: 205 Queensland: 205
Sample source	Online research only panel
Distribution of survey	Square Holes
Survey length	10 minutes
Collection dates	31 March – 27 April 2025

The project was carried out in compliance with ISO 20252.

Respondent profile for online survey

Alcohol consumed in last 6 months	
Wine	100%
Beer	65%
Spirits	62%
Ready-to-drink beverages	42%
Cocktails	40%
Cider	35%
Non-alcoholic alternatives	21%

Location	
New South Wales	25%
Victoria	25%
South Australia	25%
Queensland	25%
Within 10km of a capital city CBD	40%
Greater suburbs of a capital city	60%

Age and gender	
18-24	1%
25-29	5%
30-34	8%
35-39	13%
40-44	10%
45-49	12%
50-54	6%
55-59	8%
60-64	7%
65+	30%
Female	57%
Male	43%
Another term	<1%

Household income and composition	
Up to $20,000	3%
$20,001 to $40,000	10%
$40,001 to $60,000	12%
$60,001 to $80,000	12%
$80,001 to $100,000	11%
$100,001 to $150,000	22%
$150,001 to $200,000	14%
More than $200,000	11%
Don’t know	7%
Young person alone / shared household	8%
Young couple living together	6%
Young family - youngest child not at school	7%
Young family - youngest child in primary	12%
Middle family - youngest child in high school	6%
Middle family - child living at home high school or older	5%
Mature family - any children living at home older than high school age	9%
Mature couple	27%
Mature single	16%
Other	2%
Prefer not to say	1%

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