How can Wine win the After Work Drinks Occasion?

NIQ x Wine Australia

OPUS March 2026



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Frame the Occasion to Guide Strategy

Situation	The after-work drinks occasion remains a large and frequent contributor to the on-premise, with strong weekly engagement and a highly social, habitual role for consumers.
Complication	However, the occasion is evolving, with participation softening slightly, beer dominating due to its refreshment role, and wine under-indexing—particularly among younger consumers who are increasingly driving the occasion.
Question	How can wine better compete in the after-work drinks occasion and recruit younger consumers by aligning more closely with evolving needs, behaviours, and expectations?
Answer	This deep dive explores the dynamics of the after-work drinks occasion, identifies key consumer and behavioural shifts, and uncovers actionable opportunities for wine to increase relevance, drive trial, and win share in this growing yet changing space.

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Methodology

On Premise User Study (OPUS)

Online survey:

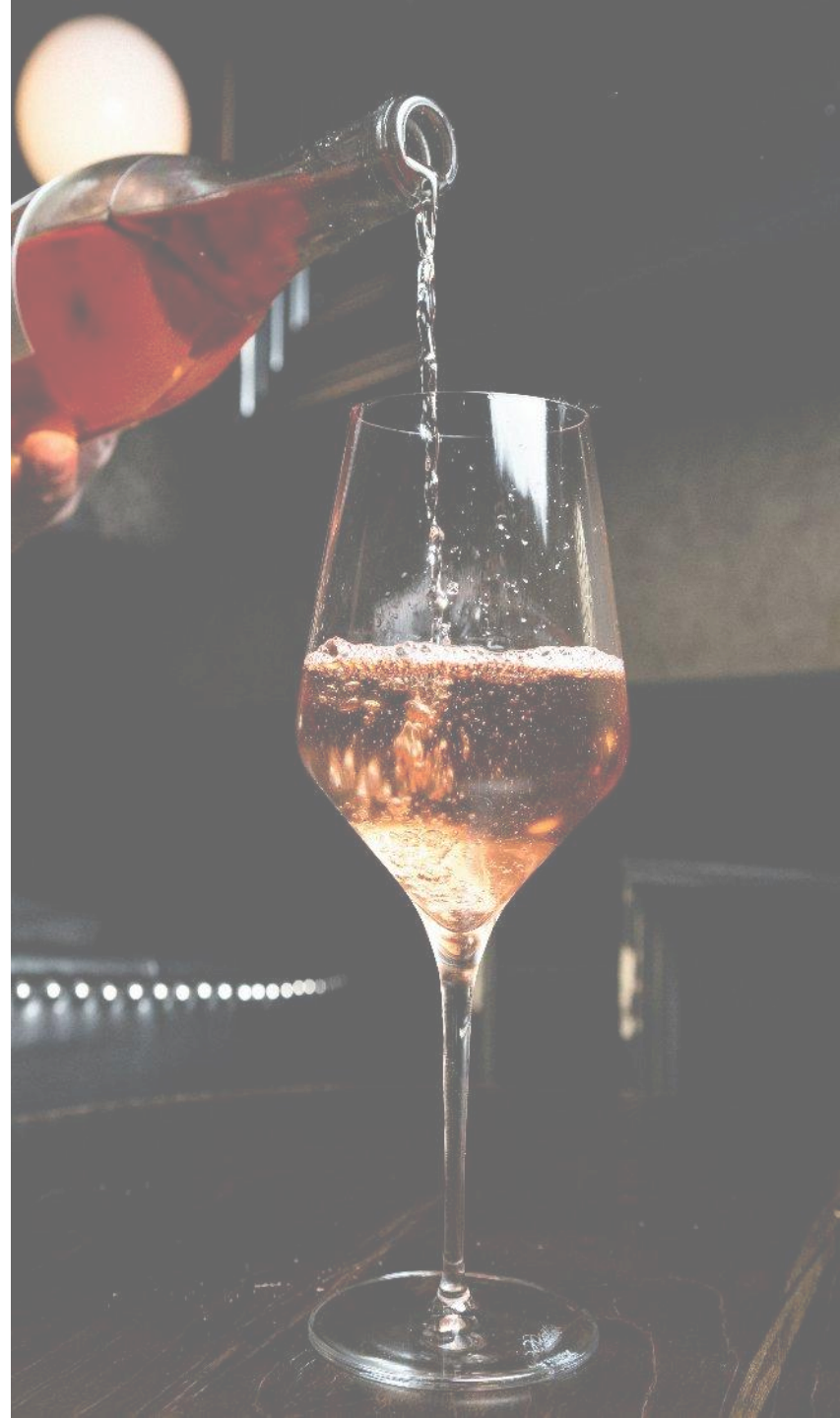
OPUS is a robust quantitative online survey that provides the foundational insights into how consumers are using the On-Premise channel and interacting with different channels, occasions and categories on their visits.

Fieldwork Dates:

The survey was in field across March & September 2022 – 2026

Sample:

- CGA surveyed 4,000 Australian On Premise consumers.
- All respondents must typically visit the On Premise in a 3-month period and be aged 18+
- A nationally representative sample of consumers across age, gender and state was collected.



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What is the After Work Drinks Occasion?



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4.4M

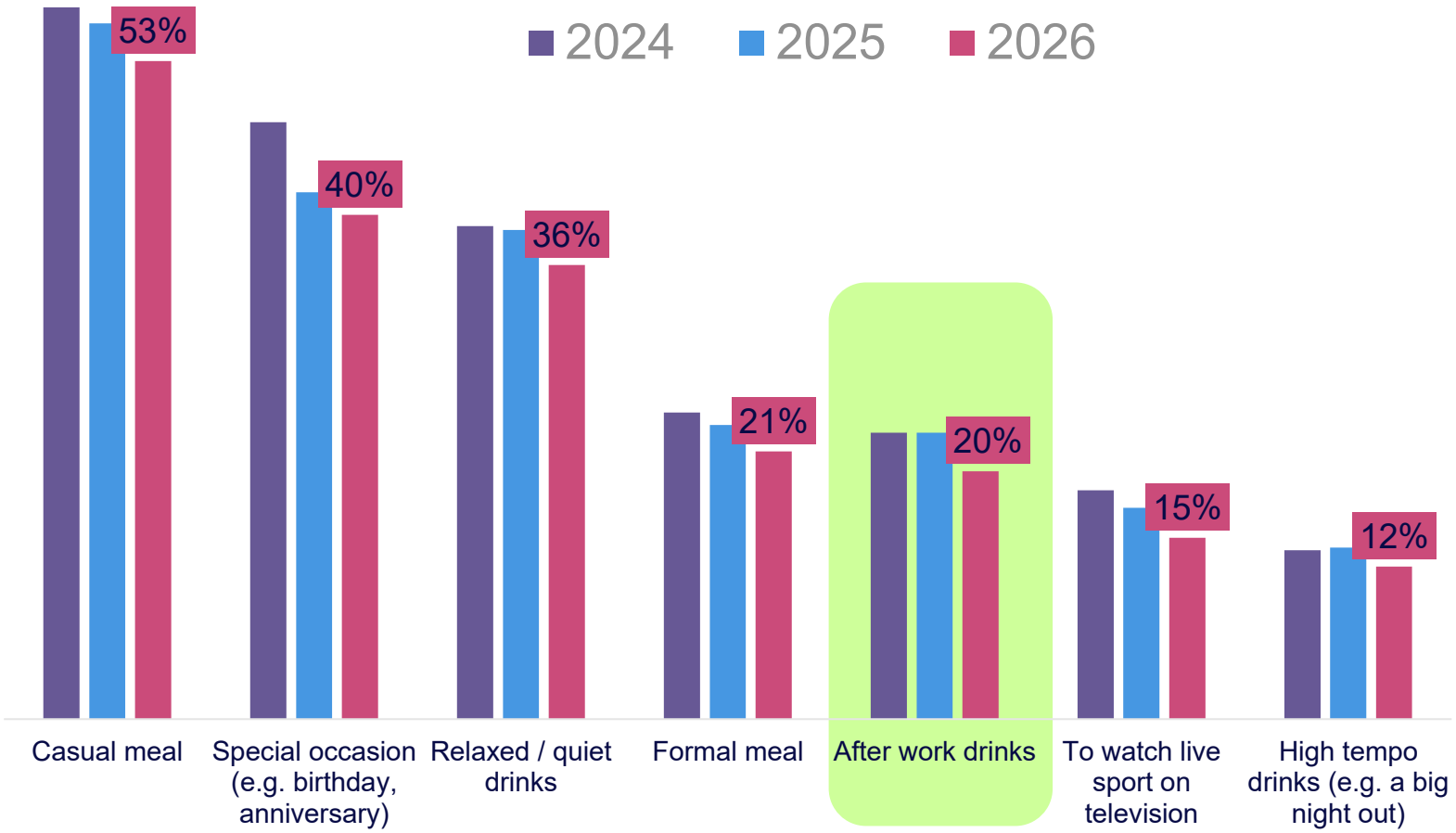
People visit the On Premise for After Work Drinks

20%

Of On-Premise visitors choose this occasion

After work drinks occasion attracts 1 in 5 On Premise consumers

Primary occasions typically visit out of home for in a 3-month period

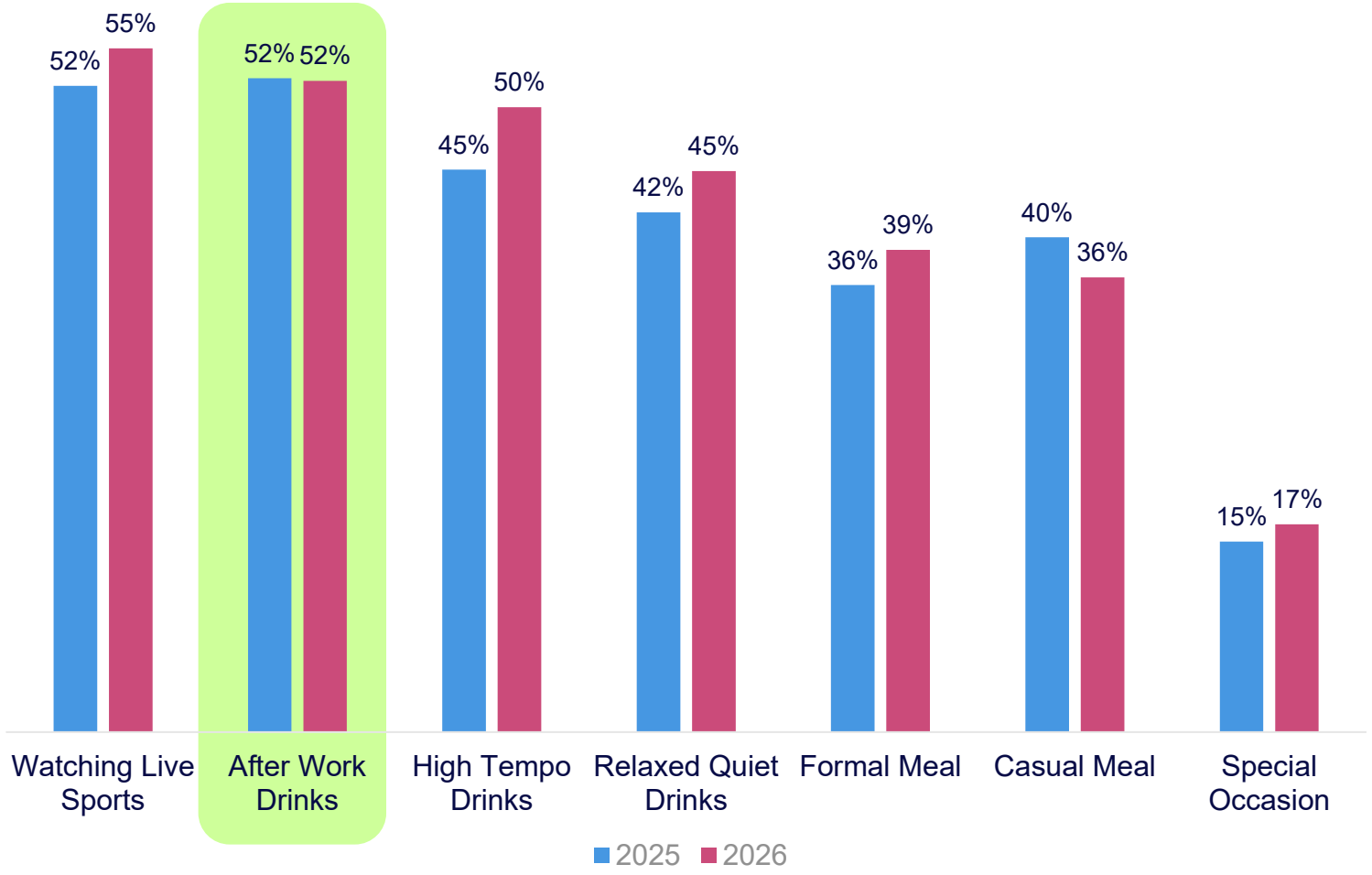


Source: NIQ OPUS Australia H1 Mar 2024 & 2025 & 2026. Sample size: 4000 - 4001

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Ranks 2nd in frequency of visit among occasions

How often do you go out for the following occasions – Weekly



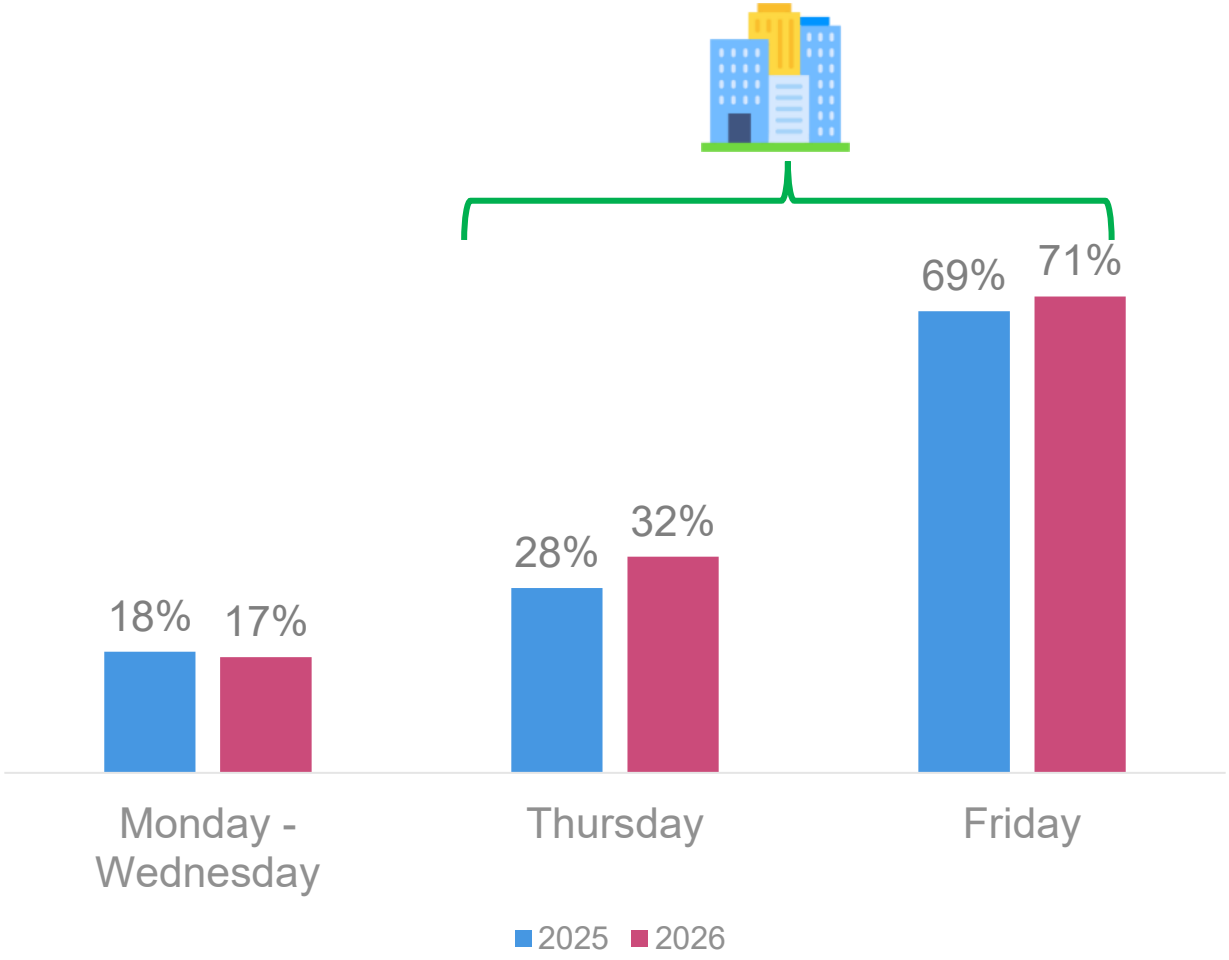


Source: NIQ OPUS Australia H1 Mar 2025 & 2026. Sample size: 484 - 2,218

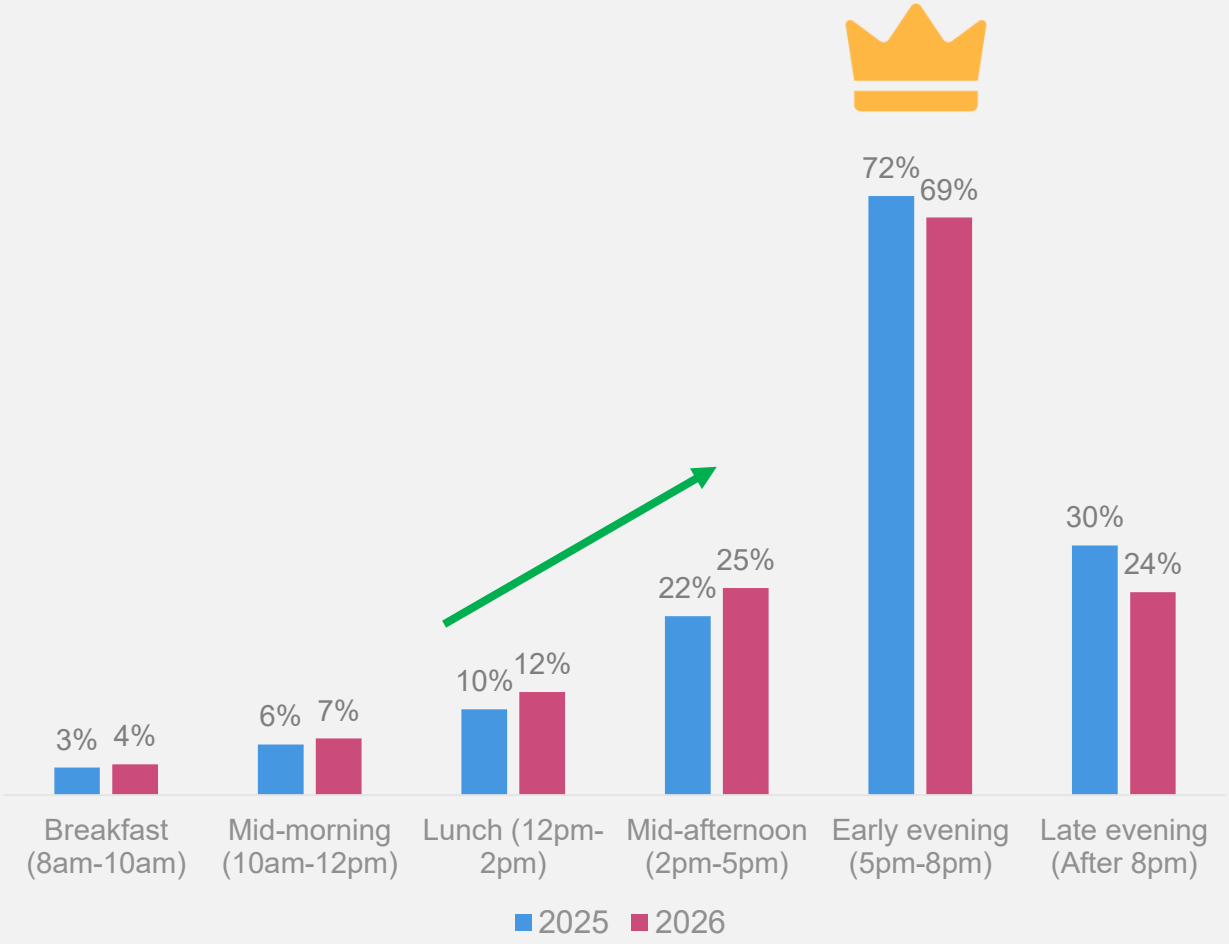
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it is fragmenting into earlier and more flexible social moments, creating new entry points for categories to win

On which days of the week would you typically go out for after work drinks?



At what times of day do you typically go out for after work drinks?



Source: NIQ OPUS Australia H1 Mar 2025 & 2026. Sample size: 730 - 824

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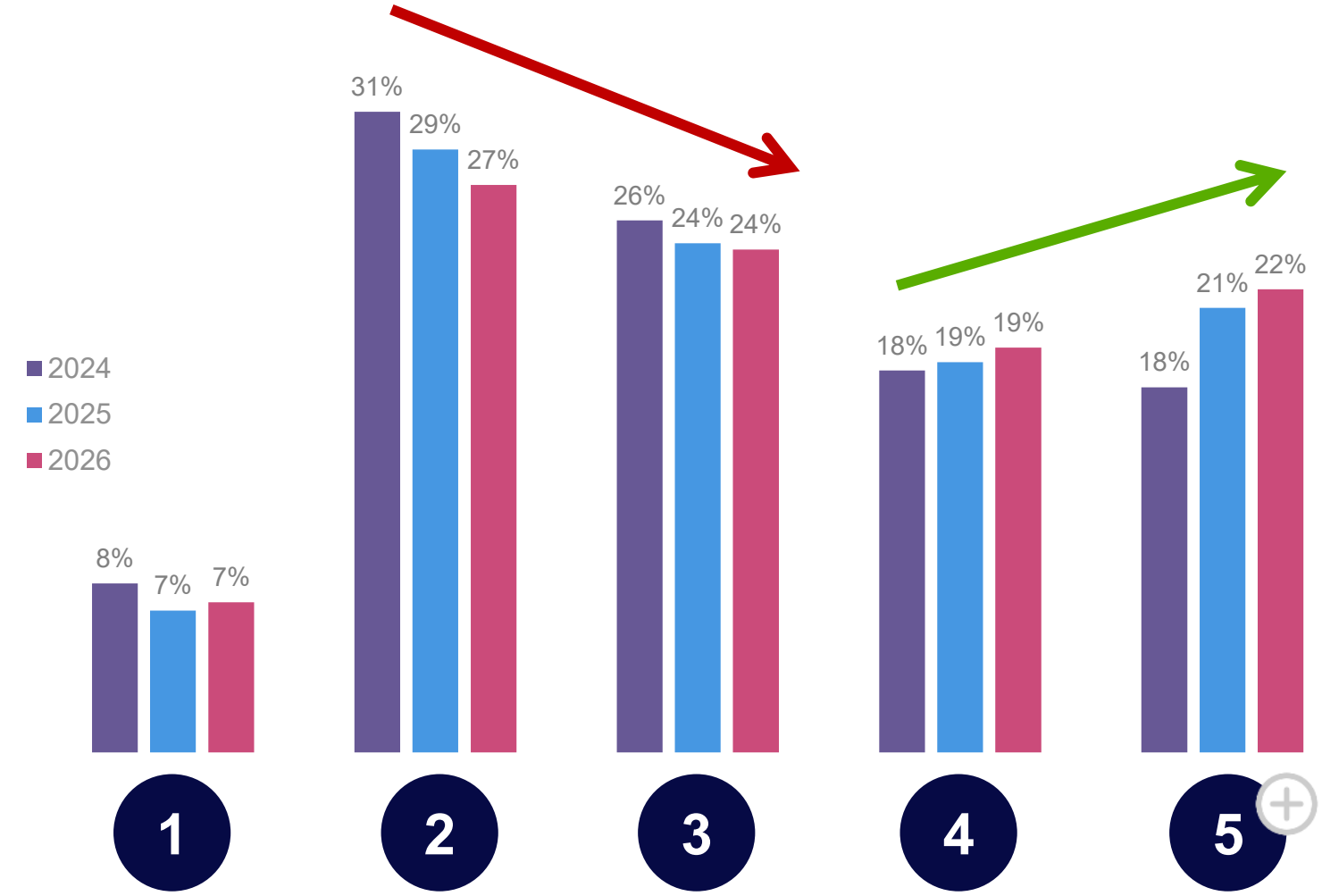


$45.49

Average expected spend per head on drinks during After Work Drinks

Consumers are increasing their drink consumption during occasions

Average number of drinks consumed when out for after work drinks

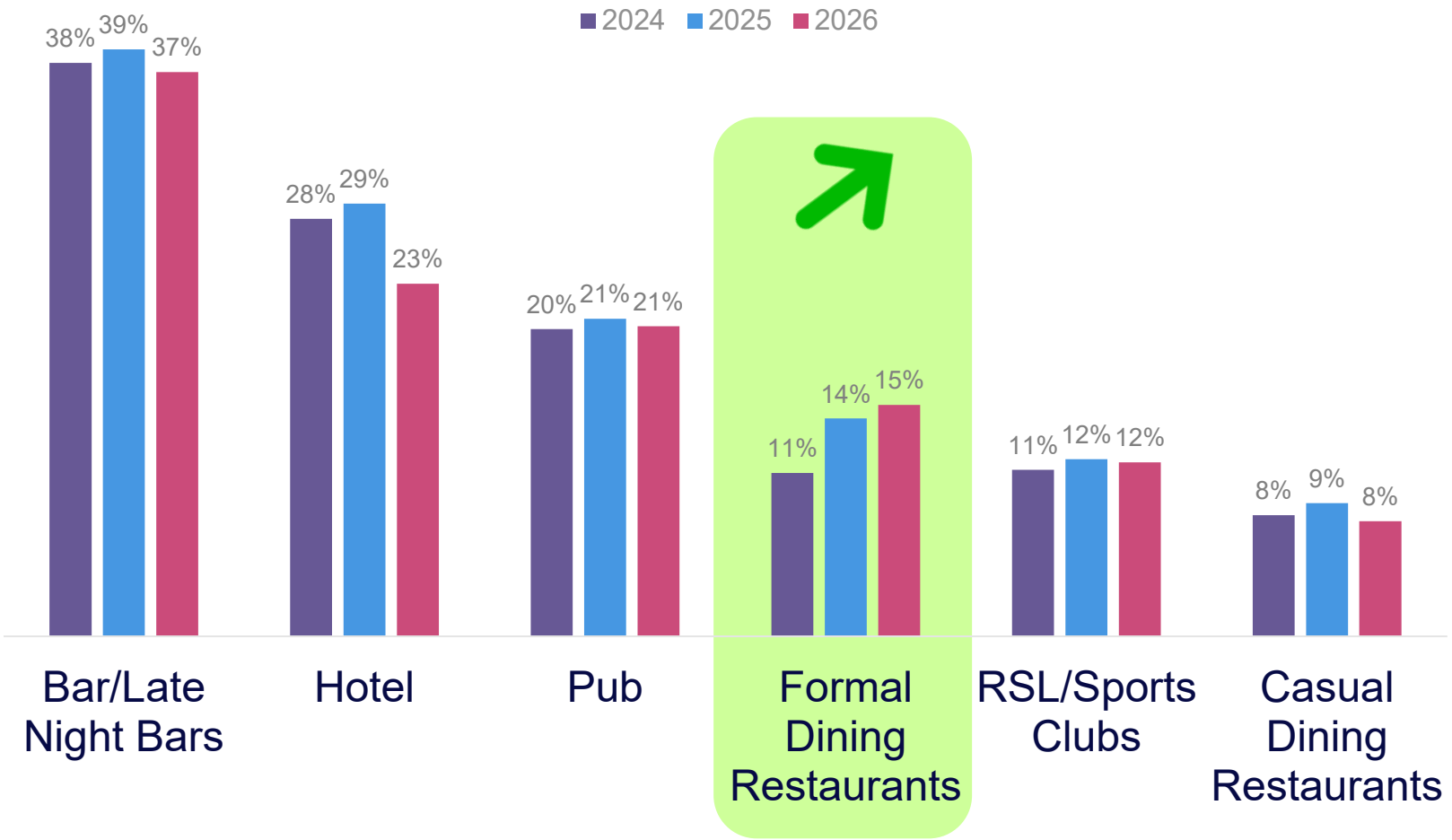


Source: NIQ OPUS Australia H1 Mar 2024 & 2025 & 2026. Sample size: 728 - 824

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While broader opportunities arise across different On-Premise cub-channels

Which channels would you typically visit for After work drinks





Source: NIQ OPUS Australia H1 Mar 2024 & 2025 & 2026. Sample size: 793 - 915

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Section Summary

- **Large but evolving occasion**
  - 4.4M Australians participate, with over half visiting weekly despite a modest decline in penetration.
- **Becoming broader and more premium**
  - The occasion is expanding beyond traditional Friday knock-offs and increasingly extends into dining-led environments.
- **More social, less colleague-centric**
  - Hybrid working is reshaping after-work drinks from a work ritual to a broader social occasion involving friends and partners.

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Who is the consumer?

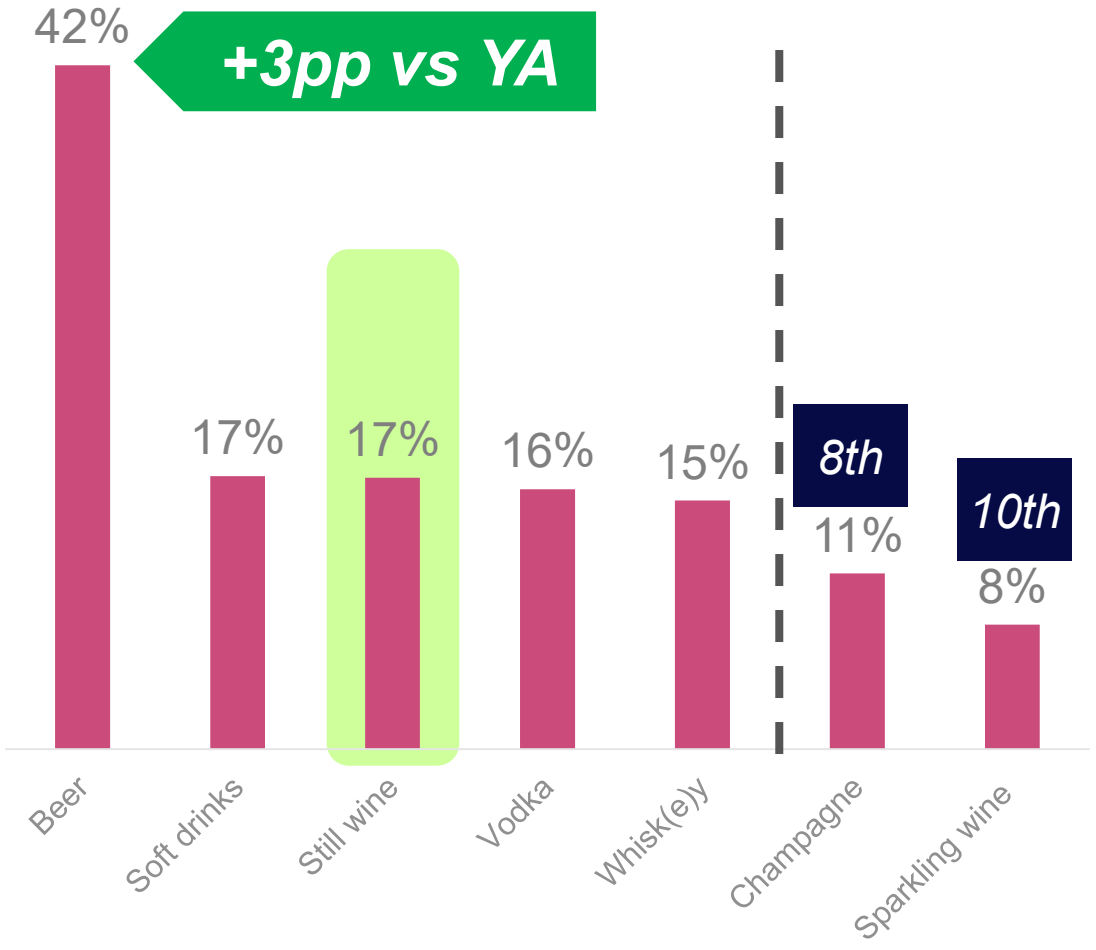


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Beer Dominates in after work drinks; Wine must find ways to win against beer through innovation, serve rituals, and format

Drink Categories consumed during after work drinks



2 in 5

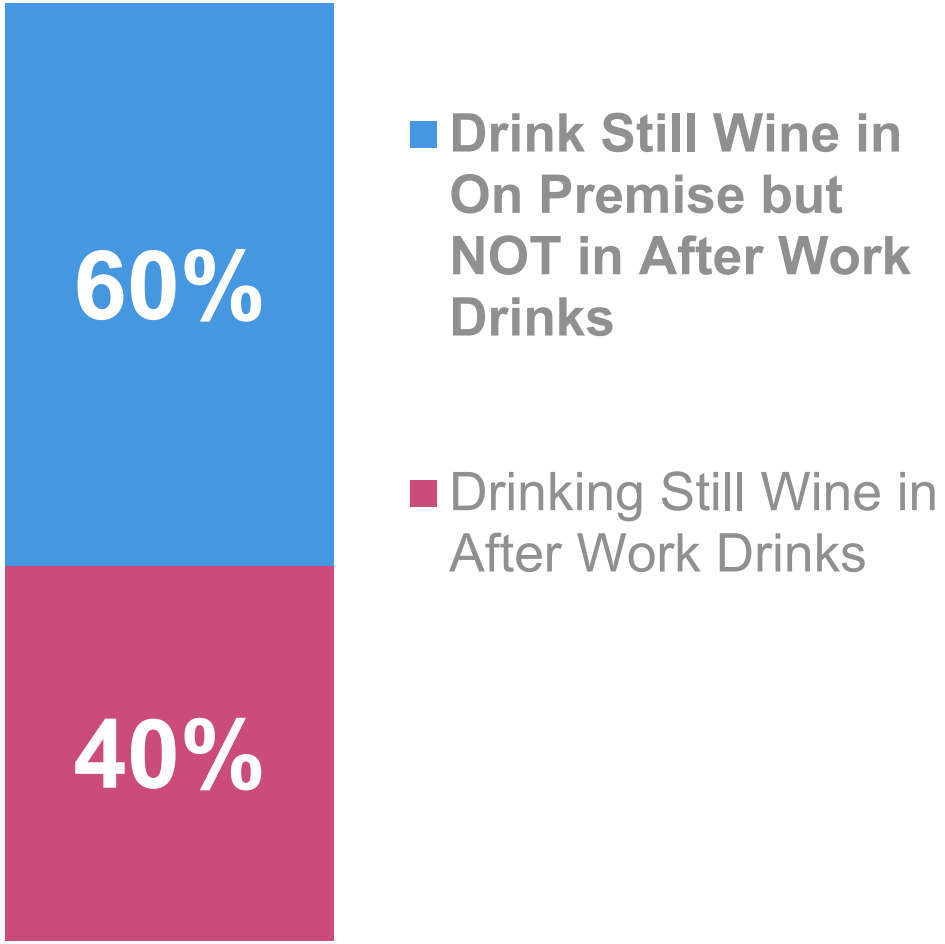
After Work Drink visitors drink beer



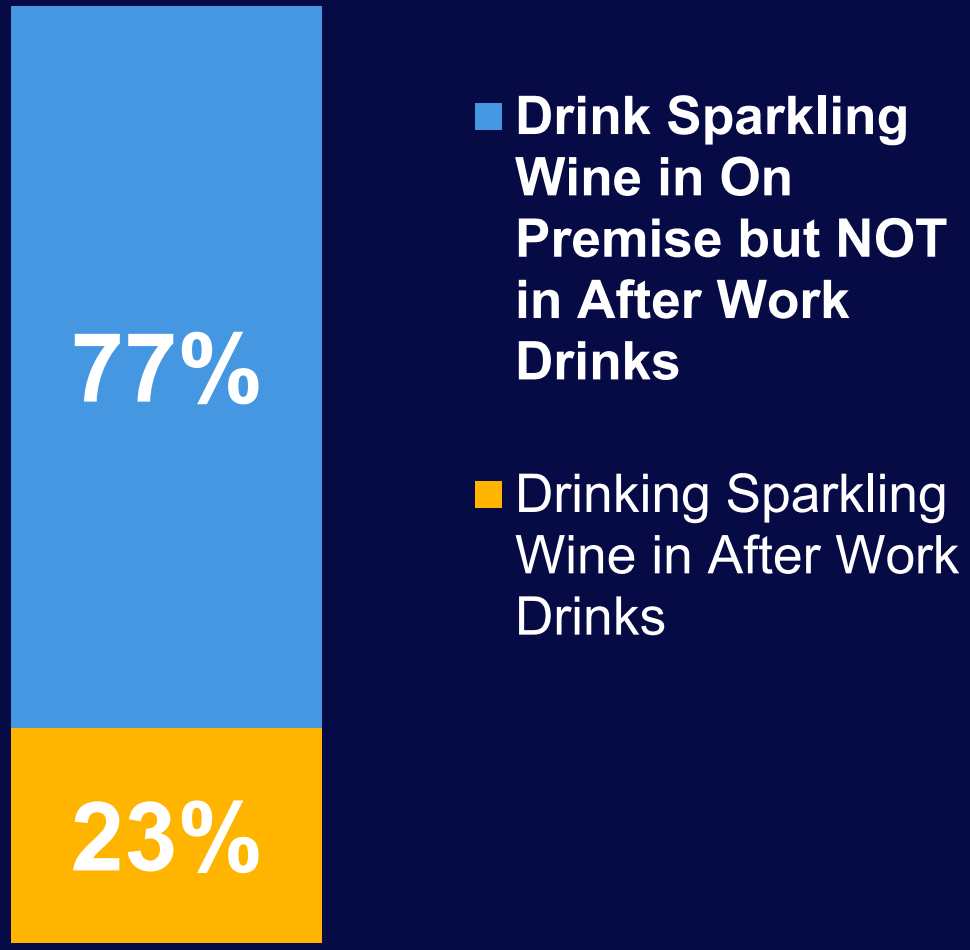
Source: NIQ OPUS Australia H1 Mar 2025 & 2026. Sample size: 304 – 824

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Still wine converts just 4 in 10 still drinkers in after-work occasions.

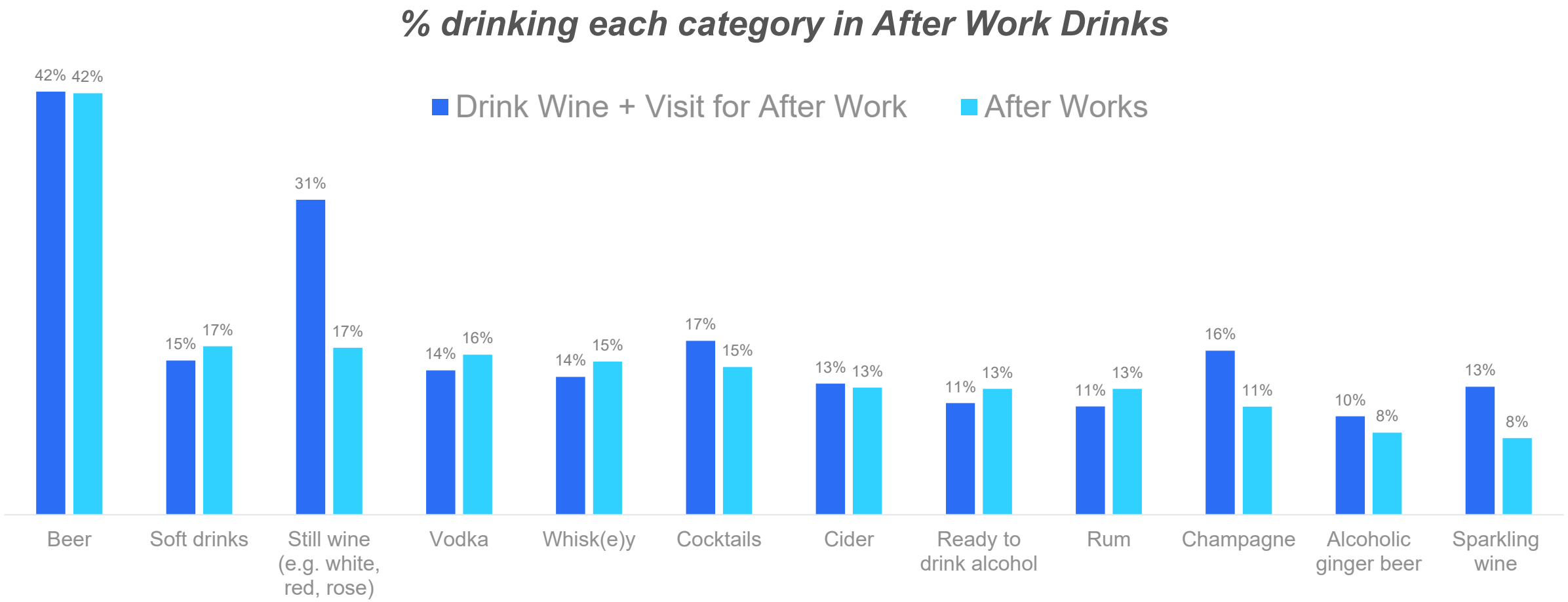


Sparkling wine converts just 2 in 10 sparkling wine drinkers in after-work occasions.



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Even among qualified wine drinkers in after works drinks, beer is still more likely to gain their interest

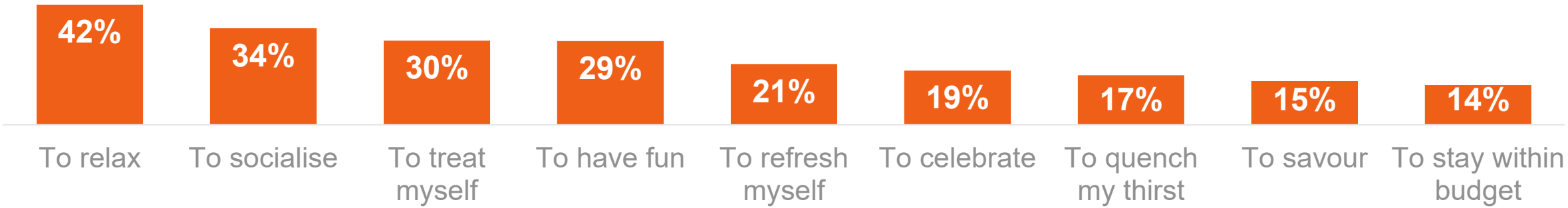


Source: NIQ OPUS Australia H1 Mar 2025 & 2026. Sample size: 304 – 824

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After-work drinks are driven by the need to unwind, with beer winning by delivering both relaxation and refreshment

Reasons for drink choice in After Work Drinks



Beer				
To relax	To socialise	To refresh myself	To treat myself	To have fun
50%	*38%*	*32%*	*30%*	*28%*

Still Wine				
To relax	To socialise	To treat myself	To savour	To have fun
62%	*37%*	*37%*	*34%*	*22%*

Sparkling wine				
To relax	To socialise	To treat myself	To have fun	To celebrate
42%	*36%*	*32%*	*26%*	*24%*

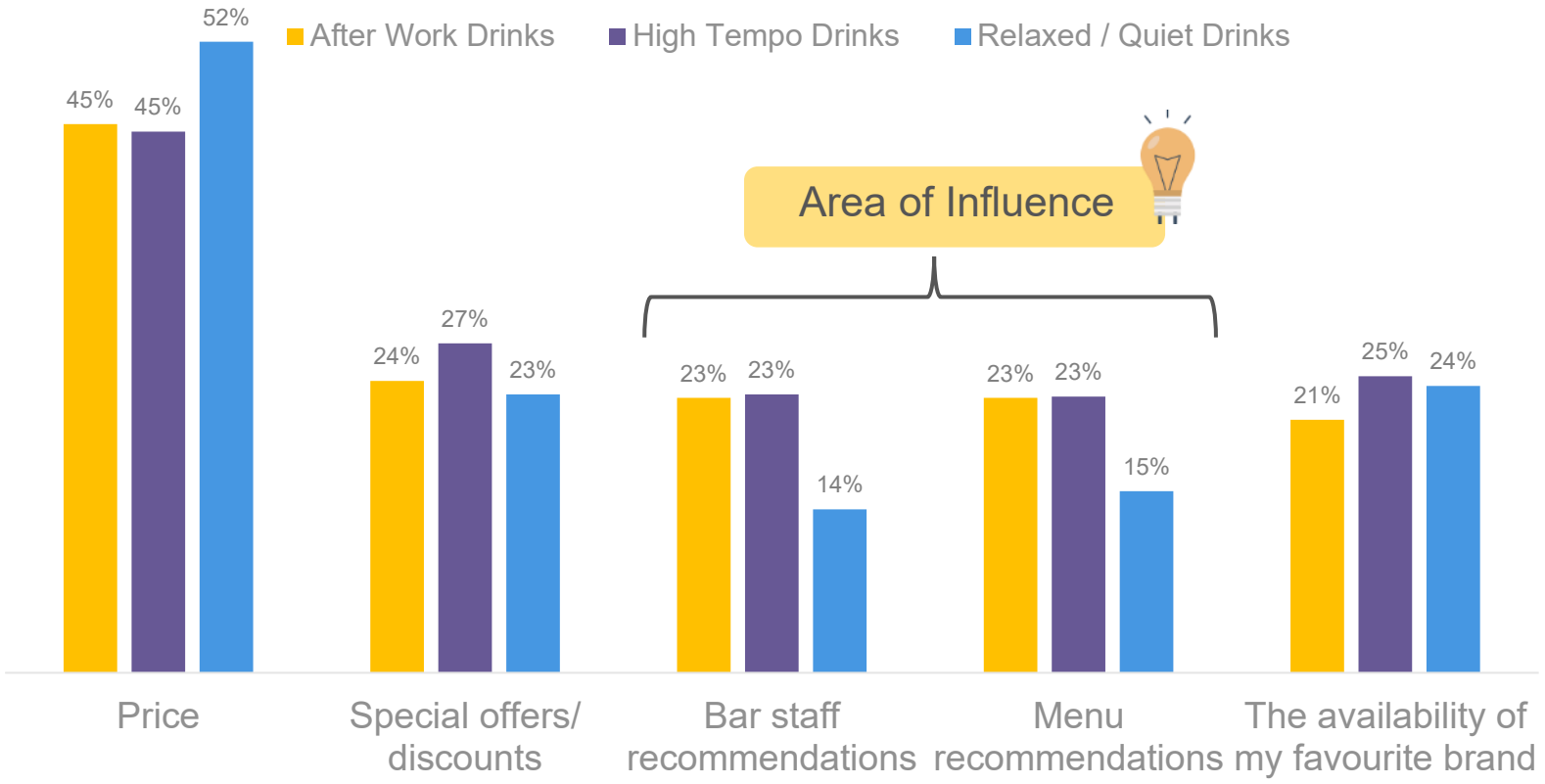
Wine remains highly relevant, but plays a more considered role centered on treating and savoring rather than immediate refreshment

Source: NIQ OPUS Australia H1 Mar 2025 & 2026. Sample size: 304 – 824

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After work drinks consumers prove to be more likely to be influenced through their on-premise journey compared to other occasions

Factors influencing choice of drink when out for X occasion





Source: NIQ OPUS Australia H1 Mar 2026. Sample size: 486 – 1,093

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Could wine take a leaf out of the spirits On-Premise playbook through a focus on bartenders?

DIAGEO

BAR ACADEMY

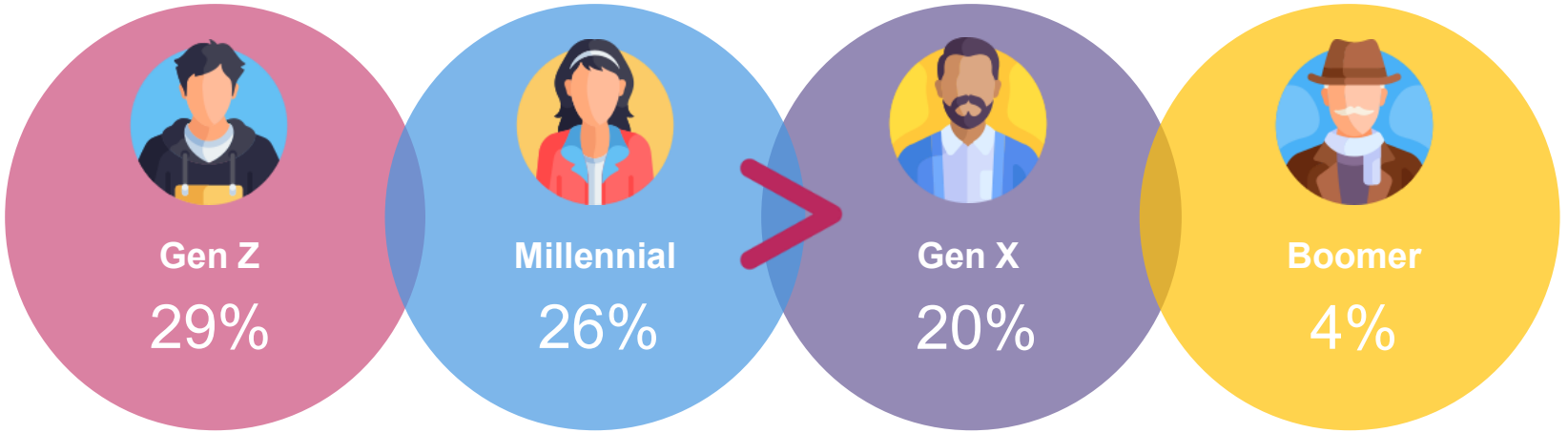
RAISE THE BAR

CAMPARI ACADEMY



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% of generation going out for After Work Drinks



% of generation drinking each wine category when out

	Gen Z	Millennial	Gen X	Boomer
Still Wine	13%	14%	20%	38%
Sparkling Wine	9%	7%	8%	10%
Champagne	12%	12%	8%	13%

Source: NIQ OPUS Australia H1 Mar 2026. Sample size: 40 – 1221

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Section Summary

- **Wine under-indexes in the occasion**
  - Only 17% of occasion visitors drink wine, compared to 42% of beer drinks.
- **The occasion is being driven by younger consumers**
  - Gen Z and Millennials over-index in participation, while wine consumption remains skewed towards older consumers.
- **Influence is a key growth lever**
  - After-work drinkers are highly receptive to price promotions, menu cues and staff recommendations, creating opportunities to recruit consumers into wine.

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How to recruit Young Consumers to Wine in After Work Drinks?

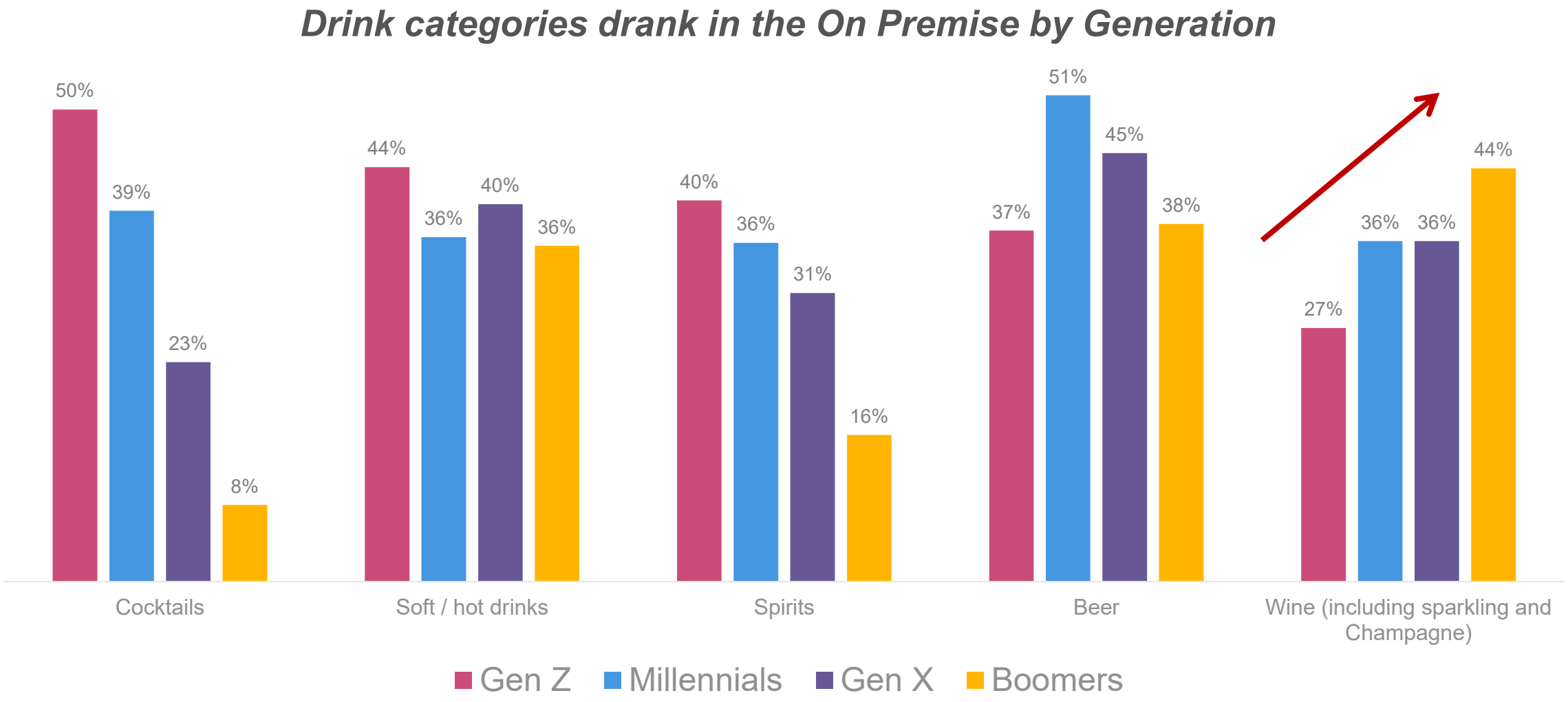


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Younger consumers prefer refreshing, varied, and social drinks like beer, cocktails, and spirits



Source: NIQ OPUS Australia H2 Sept 2025 & H1 Mar 2026 . Sample size: 1,610 – 2,487

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Younger generations provide more opportunities to be influenced in their choice of serve when ordering wine, providing a great opportunity to be driven to wine Happy Hour serves

Important factors when choosing wine when out | Generations vs Average Consumer





	Gen Z	Millennials
#1	Good Value For Money **30%** (-9pp)	Good Value for Money **28%** (-11pp)
#2	Quality of Brand / Product **22%** (-2pp)	Bar Staff Recommendations **20%** (+8pp)
#3	The House Option **22%** (+6pp)	I Always Go For My Favourite Type of Wine **20%** (-7pp)
#4	Friend Recommendations **21%** (+11pp)	The Quality of Brand / Product **18%** (-6pp)
#5	Bar Staff Recommendations **19%** (+7pp)	The Reputation of the brand **17%** (-3pp)

NIQ

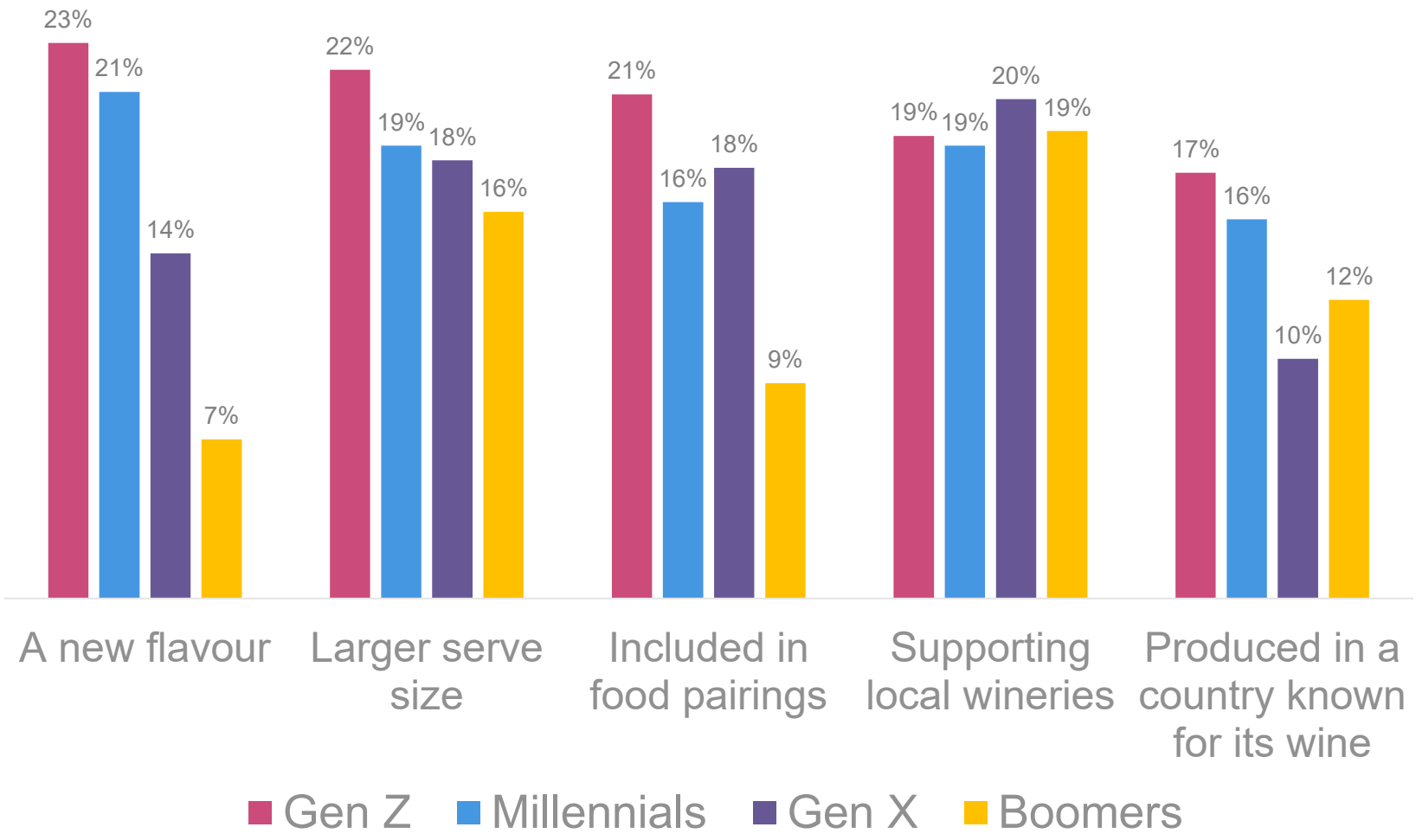
Source: NIQ OPUS Australia H2 Sept 2025 & H1 Mar 2026 . Sample size: 63 – 1059

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Encouraging factors for paying extra when ordering wine in venues

Flavour innovation, format and food pairings resonate more with younger demographics..



Source: NIQ OPUS Australia H2 Sept 2025 & H1 Mar 2026 . Sample size: 476 – 2489

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Appeal of wine formats when out – Appealing





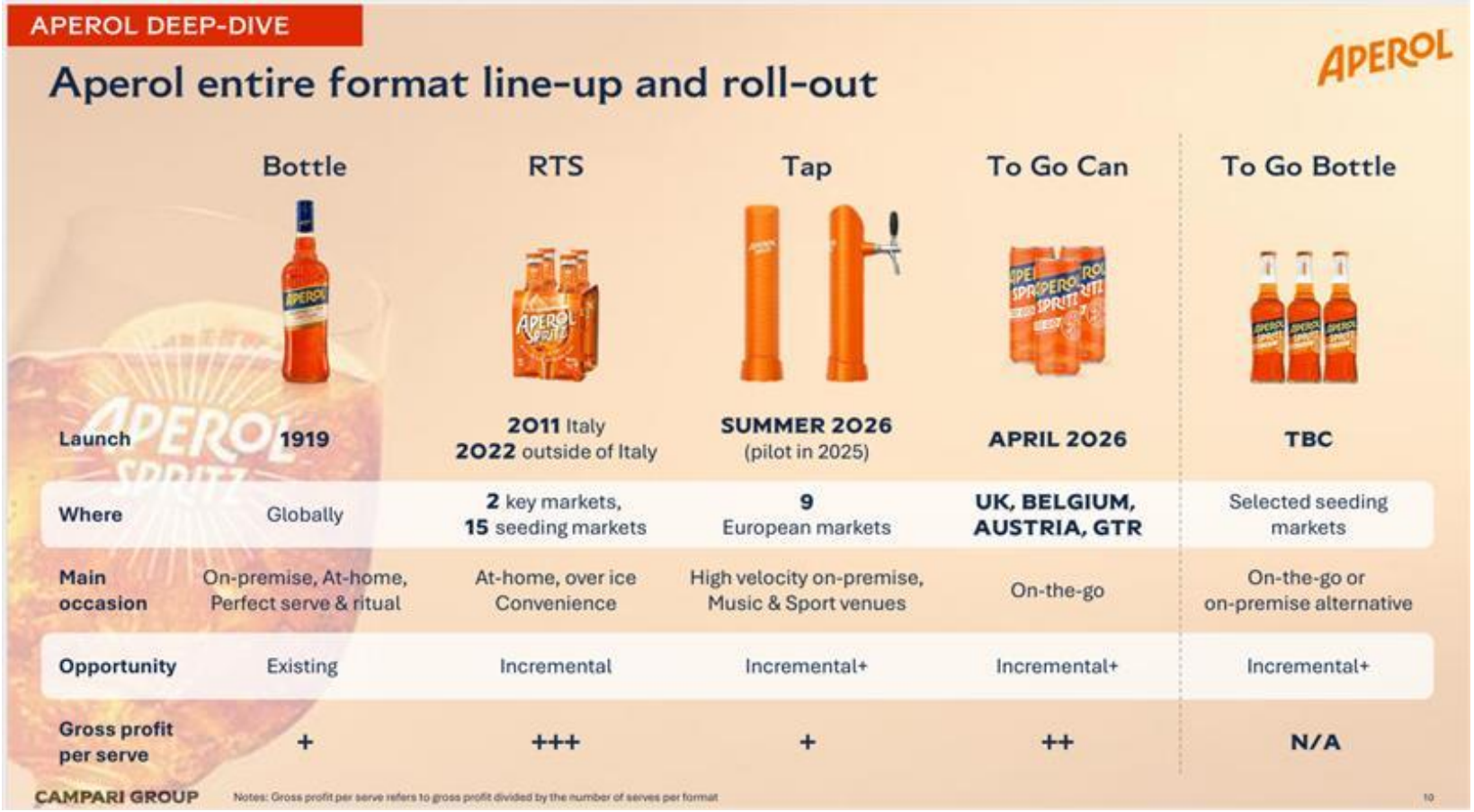
Draught Wine	Canned Wine
46%	41%
50% for Gen Z	46% for Gen Z
62% for Millennials	61% for Millennials

Alternative wine formats directly address the barriers to wine in the after-work occasion, with strong appeal among younger consumers seeking convenience, informality, and sessionability

NIQ

Source: NIQ OPUS Australia H2 Sept 2025 & H1 Mar 2026 . Sample size: 397 – 2122

What can the wine industry learn from the success and strategic direction of Aperol?



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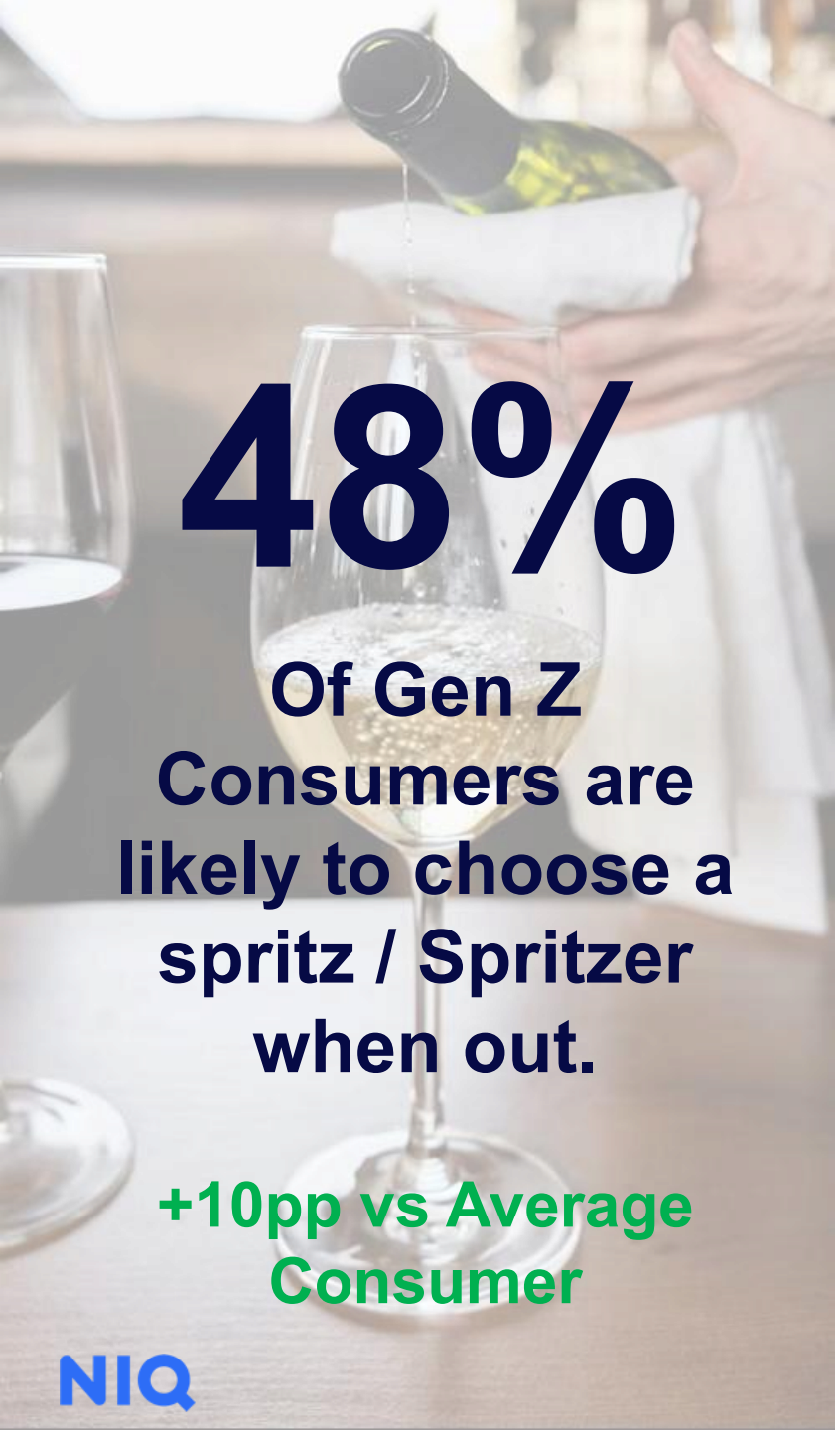
Recent examples of venues trialing wine on tap

"We're excited to announce that we are now serving wine on tap; Squealing Pig Sauvignon Blanc, St Huberts The Stag Chardonnay, Juliet Blush Moscato and Saltram Shiraz."



"While this concept may take aback wine traditionalists, actually wine on tap means that you are getting the true flavour at it's freshest and best every time. With wine on tap, you never have to worry about an open bottle decreasing in quality and losing flavour profiles."

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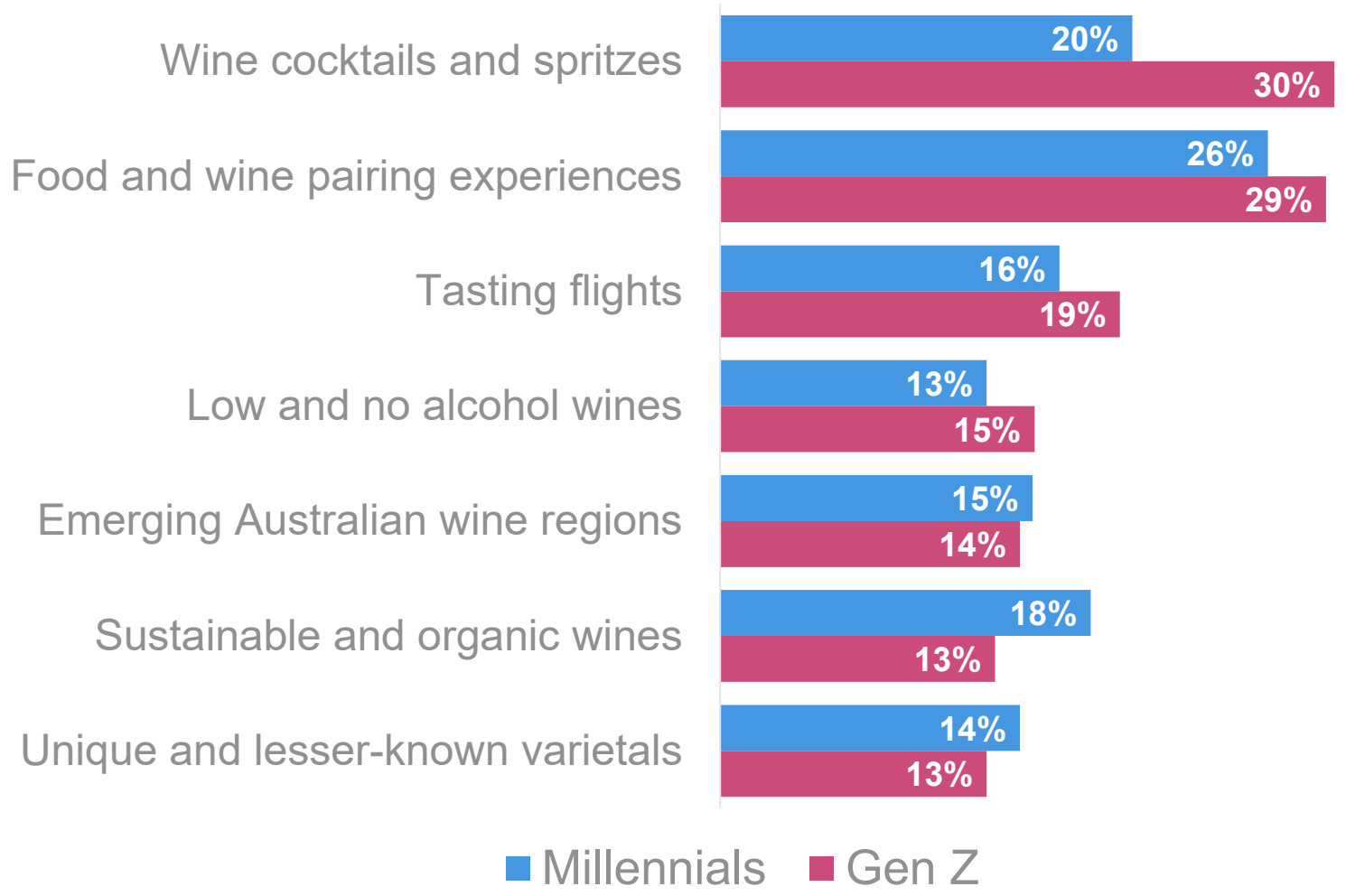
48%

Of Gen Z Consumers are likely to choose a spritz / Spritzer when out.

+10pp vs Average Consumer

Wine Cocktails and Spritz is a great opportunity to engage both Gen Z and Millennials across the after work drinks occasions

Appealing trends when drinking wine in venues

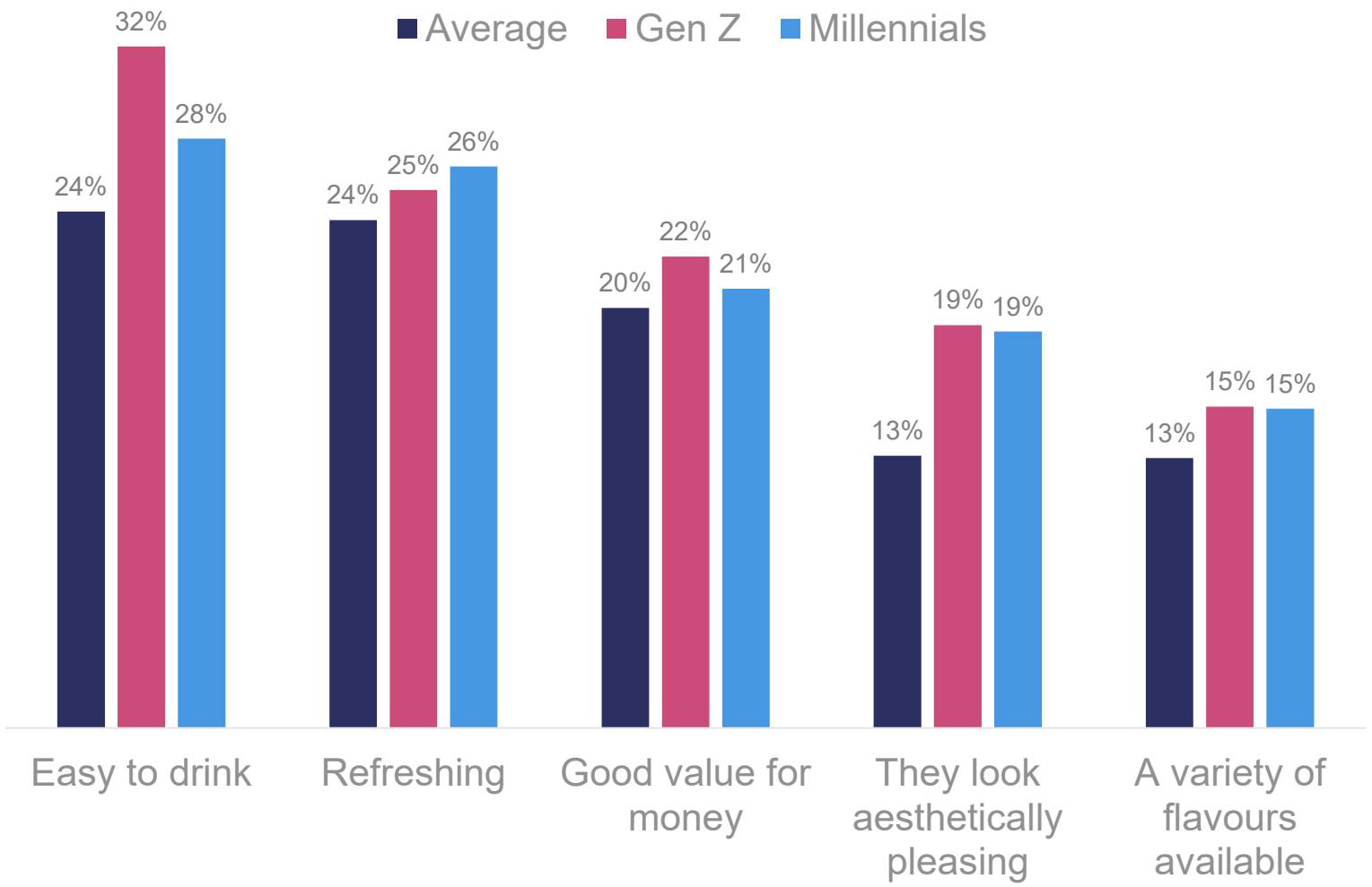


Source: NIQ OPUS Australia H2 Sept 2025 & H1 Mar 2026 . Sample size: 487 – 2492

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With the refreshing and easy to drink nature of Spritz, could this be a great way to combat beer serves in the occasion

Influencing factors for drinking a spritz / spritzer when out





Source: NIQ OPUS Australia H2 Sept 2025 & H1 Mar 2026 . Sample size: 672 – 3125

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Wine Focused Happy Hours with no sharing options



Spritz focused Happy Hours pairing well with wine



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Summary

- The after-work drinks occasion remains highly relevant, with 4.4M participants and around half of consumers engaging weekly despite a slight decline in overall participation.
- The occasion is evolving, expanding beyond Fridays into Thursdays and earlier dayparts, while also shifting from purely colleague-led gatherings to more mixed social groups including friends and partners.
- Beer continues to dominate due to its refreshment role, while wine under-indexes, with 69% of wine drinkers not choosing wine in this occasion.
- The occasion skews younger and is highly influenced in-venue, with Gen Z and Millennials driving participation and decisions shaped strongly by price, promotions, and staff recommendations.

Actions

- Wine needs to better align to the occasion by leaning into more casual, refreshing, and easy-to-drink serves such as spritz, wine cocktails, and lighter styles like Rose and Orange wine.
- Recruiting younger consumers is critical, requiring a shift toward more social, fun, and experiential wine propositions that resonate with Gen Z and Millennials.
- Increasing in-venue visibility and influence is key, younger consumers offer an increased likelihood of influence from the likes of staff and menu recommendations. Eye catching and popping activations is crucial.
- Strong value-led strategies, including wine-focused happy hour will be essential to compete with beer. With younger consumers looking for social and fun serves, thus sharing bottles / carafes would capture attention.

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3 Strategic Pillars for the Industry

1. Make wine easy
- Glass, Spritz, tap, canned
- Entry price points + Simple Descriptions

2. Make wine social
- Sharing formats
- Group occasions

3. Make wine visible
- Menus
- Staff advocacy
- Occasion-led activation (Thursday, early evening)

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As a refresher, the NPS scale used is below.

0 1 2 3 4 5 6	7 8	9 10
Not Satisfied	Neutral	Satisfied

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