



*Experimentation and
adventurous tastes*

ALCOHOL TRENDS

FOR 2017

BY

K E R V E

CREATIVITY, AFFINITY,
TECHNICAL WHIZ-KIDDERY

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INTRODUCTION

If there's one theme that's influenced the alcohol sector over the past few years, it's craft. The explosion of independent breweries and distilleries over the past decade laid out the principles of craft - small batch, high quality, provenance and experimentation.

The big brands have been quick to co-opt the design cues and language of these independent producers. In some cases they've simply bought those who were challenging them. Encouragingly for consumers though, the major players also seem to have adopted the independents' taste for experimentation, in product, packaging and marketing.

In this report we will examine how this increasing experimentation by brands, and the changing tastes of consumers, influenced the alcohol sector in 2016; and conclude what it may mean for marketers in 2017.

“Sick of all things establishment and big business, consumers turned their backs on the big faceless homogenous brands that had provided for them and satisfied them, and their parents, for decades... Consumers thirsted after smaller, more credible brands and business that reflected the values that they had been forced to adapt.”^{1.1}

Elliot Wilson, Strategy Director, The Cabinet

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EXECUTIVE SUMMARY

In this report we will examine how increasing experimentation by brands, and the changing tastes of consumers, influenced the alcohol sector in 2016; and conclude what it may mean for 2017.



TREND 1

IS THE CRAFT BUBBLE BURSTING?

Despite concerns that craft's bubble will burst, the Brewer's Association are bullishly predicting the current 5.5% share of the beer market will increase to 20% by 2020^{4.1}, and Mintel revealed that craft spirits accounted for around 15% of new global spirit launches in 2016.^{7.1}

TREND 2

ADVENTUROUS TASTES

From peanut butter beers to cinnamon whiskies, experiments with flavour are on the increase. And the boundaries between what were traditionally alcohols and soft drinks are blurring: the Beverage Marketing Corp predicted a 175% year-on-year increase for hard-soda in 2016.^{15.1}

TREND 3

DRINK TO GOOD HEALTH

Fresh and local ingredients are being championed due to consumers' increased focus on health. Big brands are responding to the demand by changing recipes, lowering sugar content and even providing gluten free options.

TREND 4

PACKAGING BECOMES A PRODUCT

Packaging has moved beyond its delivery function and even its visual identity purpose. It's now being used as a platform to demonstrate innovation, engage tech-savvy consumers and deliver personalised drinking experiences.



ALTERNATIVE
REALITIES

◆
\$120 BILLION:
AR'S PREDICTED REVENUE BY 2020
VS VR'S \$30 BILLION

LET'S GET
PHYSICAL

◆
11,000 PRODUCT LINES
MAKE HEDONISM WINES
THE BIGGEST WINE STORE
IN THE UK

◆
SENSORY OVERLOAD

◆
*Stella Artois commissioned two songs
to enhance the sweet and bitter
flavours of their lager*

◆
PACKAGING BECOMES
A PRODUCT

◆
2250

◆
CARDBOARD BEER CARRIERS
CONVERTED INTO VR HEADSETS AT
CLEVELAND CAVALIERS' GAMES

TREND 5

LET'S GET PHYSICAL

Physical retail is still vitally important to alcohol brands, and many are turning to the \$10billion pop-up industry to create bespoke, intimate, brand-focused experiences.^{29.1}

TREND 6

SENSORY OVERLOAD

Fragrances to wear while drinking and beer brewed to accompany specific songs may be interesting talking points now, but sensory marketing is predicted to become best practice in five years time.^{36.1}

TREND 7

A VIRTUAL REALITY

You're not a major alcohol brand nowadays if you haven't got a VR experience in your marketing locker, with brewery and distillery tours the favourite creative route. AR campaigns are less seen at the moment, but set to account for four times the spend over the next few years.^{45.1}

TREND 8

WINE BREAKS FROM TRADITION

Wine is booming, with Millennials. Despite a slowdown in overall category growth, Millennials are consuming more wine and more expensive wine than any other generation^{50.1}. Young, less stuffy brands, technology-driven explanations of varieties and styles, and packaging innovations are driving the shift.

TREND 9

THINK SMALL, THINK LOCAL

Craft breweries and distilleries are building hyperlocal businesses, selling directly to a smaller set of highly loyal customers who live in their immediate area. At the other end of the scale, big data is enabling retailers to tailor stock within individual stores to the tastes of the local patrons and, where possible, the produce of the area.

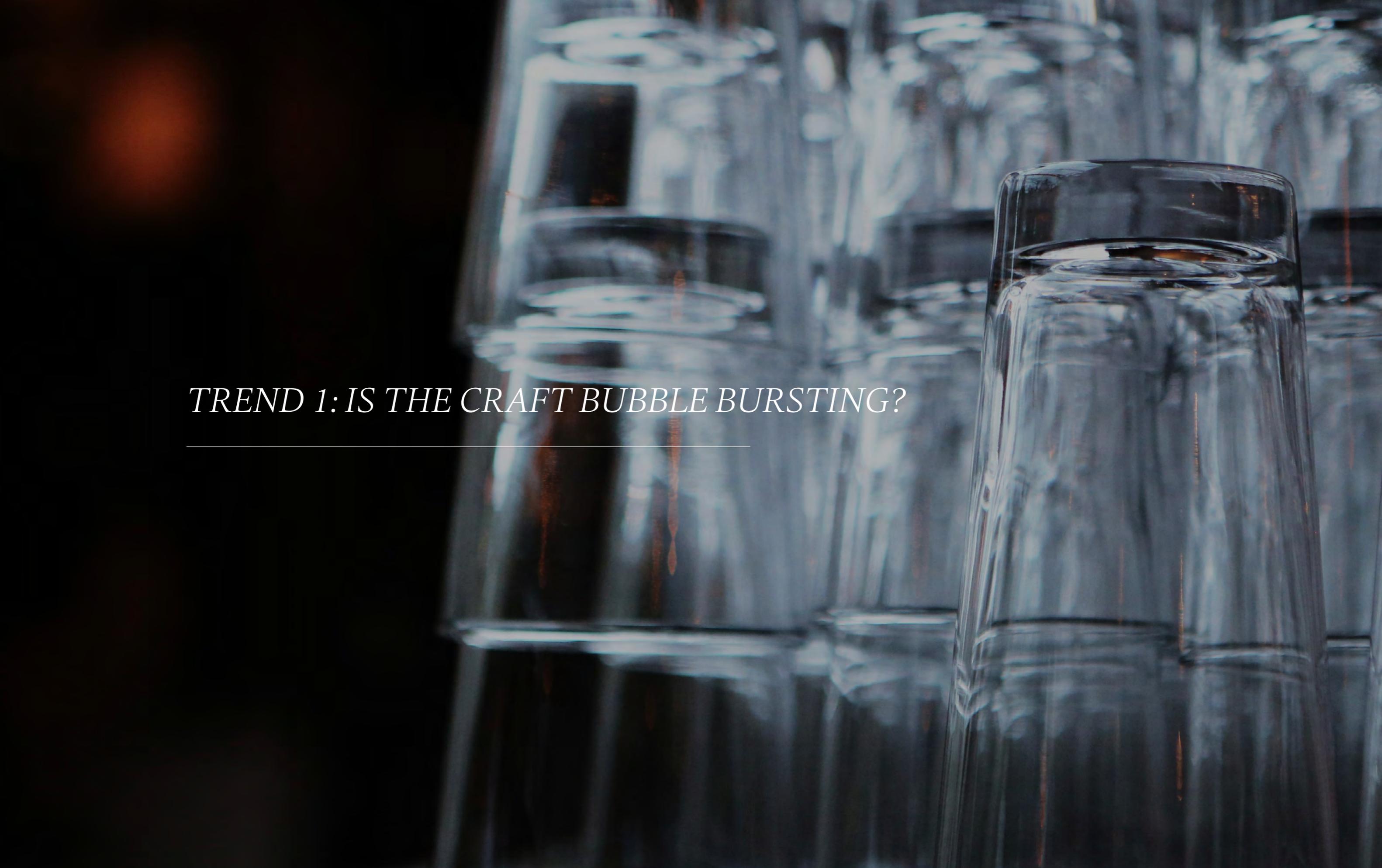
TREND 10

THIS TIME IT'S PERSONAL

Established brands and startups are both using the internet of things, wearables and the application of medical/scientific data to design hyper-personalised drinking experiences. Even if some of the scientific claims being made in the marketing spiel are questionable.

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TREND 1: IS THE CRAFT BUBBLE BURSTING?

CONSUMER TREND

Inc Magazine declared the 'artisanal' movement dead in 2012. According to their study, over 800 food brands had used the words artisanal, authentic and hand-crafted in the previous five years^{1.1}. That number will be well into the thousands by now. So desperate are brands to align themselves with craft that they've resorted to creating fake artisans: in the UK, the **National Farmers Union** are legally challenging a number of the leading supermarkets over their use of 'fake' farm brands^{2.1}. The result of the overuse and misuse of terms like craft is a growing cynicism amongst consumers. Market research group Mintel found that half of Americans think that brands describing their products as 'organic' or 'artisanal' are doing so as an excuse to up their prices^{3.1}. So is craft a bubble that's about to burst?

“You can design a pizza that says ‘this is an artisan pizza’ and have some (advertising) copy, but you’re not going to get any loyalty beyond that.”^{1.2}

David Bernard, Co-founder, Mythmaker.

HOW THE ALCOHOL SECTOR IS RESPONDING

If consumers are losing faith in artisanship, craft beer would appear to be among the first sectors at risk. **The Brewers Association** however, are bullishly predicting that craft can increase its current 5.5% share of the US beer market to 20% by 2020^{4.1}. The big breweries are certainly betting on UK growth, with SAB Miller buying our longstanding clients **Meantime Brewing** in 2015*, and **AB InBev** buying **Camden Town Brewery** in 2016. There's no sign of a slow-down amongst the smaller breweries either, with **SIBA** reporting that UK independent brewers increased production for the seventh year running in 2016^{5.1}. But, with over 800 breweries now operating within the UK are we reaching saturation point? Not according to Daniel Sylvester, founder of the **London Craft Beer Festival**:

“In the States — especially on the East and West Coasts — the split between the traditional beers (things like Budweiser) and craft beers is 33% craft beer and the rest traditional. In the UK, it's 3% craft beer and the rest traditional.”^{6.1}

Daniel Sylvester, Founder, London Craft Beer Festival. Ref: 6.1

The craft spirits market seems equally buoyant. **Mintel** revealed that in 2016 craft spirits accounted for around 15% of new global spirit launches, up from 5% in 2011^{7.1}. The drinks leading the charge in this category are a renaissance tequila, and a newly fashionable gin.

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Tequila has shed its image of cheap shots and toilet bowls and become a high-end beverage in high demand. **Nielsen's** research found that tequila is growing faster than the overall spirits category in the USA and one third of the money spent on tequila is on 'super' and 'ultra' tequilas^{8.1}. **Patrón's Roca** line, costing upwards of £50 grew by 20% in the first quarter of 2016.^{9.1}

While tequila makes waves in the USA, gin is the UK's current spirit of choice. The number of gin distilleries in Britain has doubled in six years, with 233 producers registered with HM Revenue and Customs by the end of 2015^{10.1}. And there's no sign of this rate slowing - the latest UK government figures reported a year on year increase in distillery openings of 50%.^{11.1}

“Gin is in fact now most likely to be drunk by younger consumers, suggesting that it has a chance to forge a dynamic image and move into even more innovative areas.”

Chris Wisson, Senior Drinks Analyst at Mintel. Ref: 7.2

So, in short, the craft 'bubble' shows no immediate sign of bursting. In fact, with younger drinkers moving towards premium brands, and Brexit's weakening of the pound improving British exports, the UK's craft bubble looks set to get bigger.

*Meantime Brewing are now owned by **Asahi**, having been sold to the Japanese brewing giant during AB InBev's acquisition of SAB Miller in 2016.

OUR PREDICTIONS

Premium tequila is still very much a niche concern in the UK. Expect this to change as trend-hunting consumers move on from 2016's favourite, gin. Gin will continue to grow though, with greater flavour experimentation and hyper-localisation from independent distilleries fighting to make a name for themselves. The smaller craft breweries will also become hyper-localised in their business models and distribution. Those breweries who do break through on a national-scale will face stiff competition from the corporates' 'craft' brands and craft acquisitions.



TREND 2: ADVENTUROUS TASTES



CONSUMER TREND

Consumers are developing more adventurous tastes for food and drink. Increased travel, the litany of cooking shows, YouTube food channels and Instagram food porn, all expose us to new ingredients and flavour combinations. And our knowledge of and taste for the unusual is valuable social currency.

“As Millennials long for new experiences and view eating as self-expression, they are open to flavor experimentation... They want to be the first to try and share something new, for instance unexpected flavor combinations or exotic ingredients – surprise me!”^{12.1}

Regine Lueghausen, Marketing Director Flavors EMEA, International Flavors & Fragrances



HOW THE ALCOHOL SECTOR IS RESPONDING

The craft beer sector in particular is taking a more-is-more approach to product innovation, with flavours seemingly only limited by imagination. Colorado's **New Belgium Brewing** teamed up with **Ben & Jerry's** to create the fiendishly rich sounding **Chocolate Chip Cookie Dough Ale**. Meanwhile, on this side of the Atlantic, Somerset's **The Wild Beer Co.** have been busy building a fearsome reputation with beers which taste like bonfires and peanut butter.

Spirits may not be conducting quite as outlandish experiments but, as **Absolut** proved at the turn of the century, there's a lot of mileage for the sector to develop new flavour variants. **Sazerac's Fireball Cinnamon Whisky** saw a 65% year-on-year increase in US sales in 2016, while **Jim Beam's** flavours portfolio saw US off-trade sales surge by 30%.^{13.1}

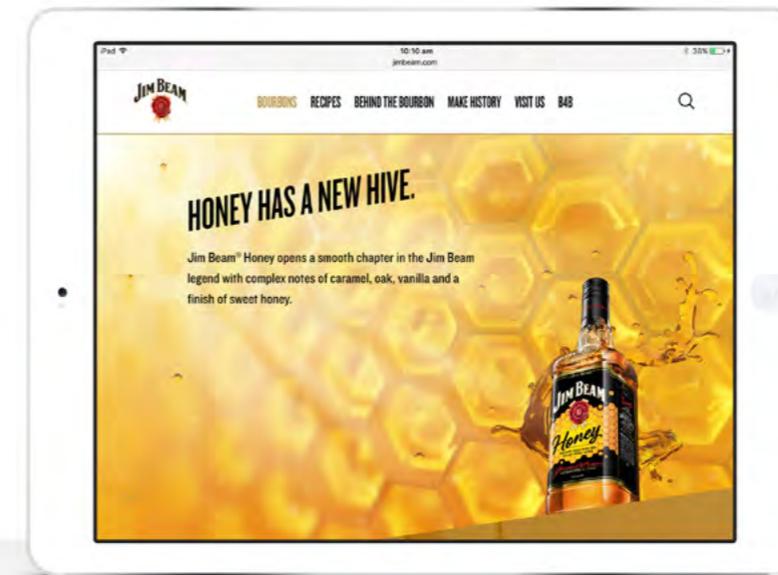
“The flavours are great for mainstream bars and restaurants that are catering to 18 to 25 year-old consumers as they provide accessible cocktail alternatives. American-style restaurants and bars are popping up around London and other metropolitan cities in the UK so, as this type of cuisine becomes more popular, so do beverages, including spirits.”^{14.1}

Janice McIntosh, Marketing Controller, Maxxium UK.





As flavour variants compete with mixers as the entry to spirits, so mixers are becoming alcoholic drinks in their own right. **Pedrino's** sherry based tonic, **Fentiman's** Alcoholic Ginger Beer and **Henry's Hard Soda Cherry Cola** are just some of the 'hard sodas' blurring the lines between mixer and main drink. By tapping into customers' nostalgia for the flavours of their youth, this emerging category is predicted to make a 175% year-on-year increase in sales during 2016.^{15.1}



Even the wine industry, the bastion of tradition, has jumped upon customers' increasing appetite for new flavours. The 'fruit fusions' category is now worth more than £48 million, although it's not so much a category as of yet, more an Echo Falls balance sheet, as their Fruit Fusions line accounts for 91% of the category.^{16.1}

OUR PREDICTIONS

Nostalgia will continue to play a big part, with craft breweries partnering with food brands and soft drinks to develop new flavour variations, and hard soda continuing to grow, particularly at the premium end of the spectrum. Wineries will desperately try to get a slice of the fruit fusions category that **Echo Falls** currently owns.

A close-up, low-angle shot of several hands holding beer glasses filled with beer, creating a toast. The glasses are of various shapes and sizes, some with thick foam. The background is blurred, showing other people and glasses, suggesting a social gathering. The lighting is warm and dim, typical of a bar or restaurant.

TREND 3: DRINK TO GOOD HEALTH

CONSUMER TREND

The continual growth of the health and wellness movement is changing the lifestyle and purchasing decisions of consumers. The number of vegans has increased by 360% in 10 years^{17.1}, 'clean-eating' bloggers are becoming household names, and gym gear is as likely to be seen in coffee shops as exercise classes. Crucially for the alcohol sector, millennials are drinking less than the generations before them.^{18.1}

“The people in my parents’ generation who have smoked, drank and eaten convenience food their entire lives all look like hell and it’s quite obvious to see why.” 18.2

Kayley Conway, healthy lifestyle blogger, www.bluejeanswhiteteeblog.com



HOW THE ALCOHOL SECTOR IS RESPONDING

Breweries, distilleries and wineries are putting fresh and local ingredients front and centre in their response to consumer demand for healthy choices. For some brands, such as Scotland's **Caorunn Gin**, the use of local ingredients is at the core of their ethos. They forage the countryside surrounding their distillery for traditional gin botanicals and less typical, highly local, flavourings such as Bog Myrtle and Coul Blush Apple.

For other brands, the demand for healthy choices is forcing a change of recipe. In February **Diageo** launched **Smirnoff Sourced**, a range of the three gluten-free flavoured vodkas. By replacing high fructose corn syrup with fruit juice they ticked the 'fresh' ingredients, gluten free and low-sugar boxes in one go. (And prepared themselves for the much-muted sugar tax currently under consideration by the UK government.)

While we're waiting to hear how Smirnoff Sourced fares with customers, **Thomson and Scott** have already proved the appeal of low-sugar alcohol. Their Skinny Prosecco, which boasts just 1 grams of sugar per glass vs the standard 7 gram per glass, became Selfridge's fastest growing product.^{19,1}

Why stop at reducing sugar when you can actively improve health and wellbeing though? **Bompass & Parr's** 'Anti-AGin' is made with botanical ingredients such as collagen, nettle, Gotu Kola, chamomile, witch hazel oil and burdock, which together make the drink "the alcoholic equivalent of a facial"^{20,1}. We haven't confirmed how much you have to drink to achieve that effect.



OUR PREDICTIONS

Brands will tweak existing recipes to reduce sugar, and breweries will start offering more gluten-free and low-carb beers. The use of natural and local ingredients will become more commonplace and far more talked about by marketing departments. Brands will seize upon the success of **Supernatural's** alcoholic juice bar, to launch alcoholic juices and health-centric pop-ups of their own.

A close-up photograph of a red KFC box. A white USB cable is plugged into a port on the side of the box. The box features the hashtag "#Sabber" in white, a logo that says "WATTT" with a lightning bolt, and a recycling symbol with the text "Please help KFC and dispose and place in a". The background is a solid red color.

TREND 4: PACKAGING BECOMES A PRODUCT



CONSUMER TREND

As the **unboxing video phenomenon** shows, packaging is fast becoming as important to consumers as the product inside. Many brands are using it as a platform to demonstrate innovation and engage tech-savvy consumers. And, as **McDonald's** 'McTrax' music station^{21.1} and **KFC's** 'Watt-a-box' phone charger^{22.1} prove, your product needn't have any inherent tech connection for your brand to play in this space.

“Promotional packaging is a smart, fun way to create interactive experiences for customers... social media quickly picks up on these announcements, and people all over the world join in the conversation - bringing your brand's name with them.”^{23.1}

Brian Loper, Senior Art Director, Hanlon Creative

HOW THE ALCOHOL SECTOR IS RESPONDING

The cardboard beer carrier **Budweiser** created for basketball team **Cleveland Cavaliers** is a near perfect marriage of brand, opportunity and engagement. Once back at their seats, fans can fold the carrier into a headset and insert their phones. Then, via the Cavaliers' mobile app, they can access four VR videos, including a tour of the locker room and player introductions.^{24.1}

Malibu's 'Coco-nect' cocktail cups also seek to improve consumers' event experience, by enabling them to order drinks "straight from the cup"^{25.1}. Twisting the base of the cup sends an order over Wi-Fi to the Malibu bar, who will then prepare your drink and bring it you, via GPS and the unique RFID identifier on each cup. A great idea, as anyone who's encountered the trudge to a 100 person deep festival bar will testify. What the poor barman, trying to locate the customer in a sea of thousands, will think is another question.

Back indoors, **Kuvee's** hi-tech wine bottles have a full-colour LED screen which, upon connection to Wi-Fi, will display information about the wine you're drinking - the grapes, region of origin, history of the estate and biography of the winemakers. It will even let you order more bottles or discover recommended alternatives, direct from the bottle.



“We need to make sure that any innovation is rooted in consumer need and has to be focused around the consumer experience. Once you have that, you can quite confidently introduce new norms to consumer and see how it goes.”^{25.2}

Deborah Nuñez, Global Brand Manager, The Absolut Company

OUR PREDICTIONS

LED screens delivering product and brand information will become commonplace on high-end wine and spirit bottles over the next few years, as the cost of production lowers. Festivals will see a surge in convertible VR packaging such as Budweiser's. Conductive ink will be used to create interactive experiences on cans and bottles. And at least one brewery will launch a six-pack that turns into a bluetooth speaker.

TREND 5: LET'S GET PHYSICAL



CONSUMER TREND

Despite the travails of the high street, eCommerce is still predicted to amount to just 19.3% of total UK retails sales by 2019^{26.1}. In fact, the giants of online retailing, from **Amazon** to **Warby Parker**, are now opening physical stores^{27.1}. Why? Because physical stores create intimate, brand-focused experiences. Many brands are turning to the pop-up shops to deliver these experiences (driving a \$10 billion industry^{28.1}). As we found with the #HoleInTheWall we built for **Krispy Kreme**, pop-ups can also generate huge sales, press coverage and social media buzz.^{29.1}

“People will forget what you said,
people will forget what you did,
but people will never forget how
you made them feel.”^{30.1}

Maya Angelou

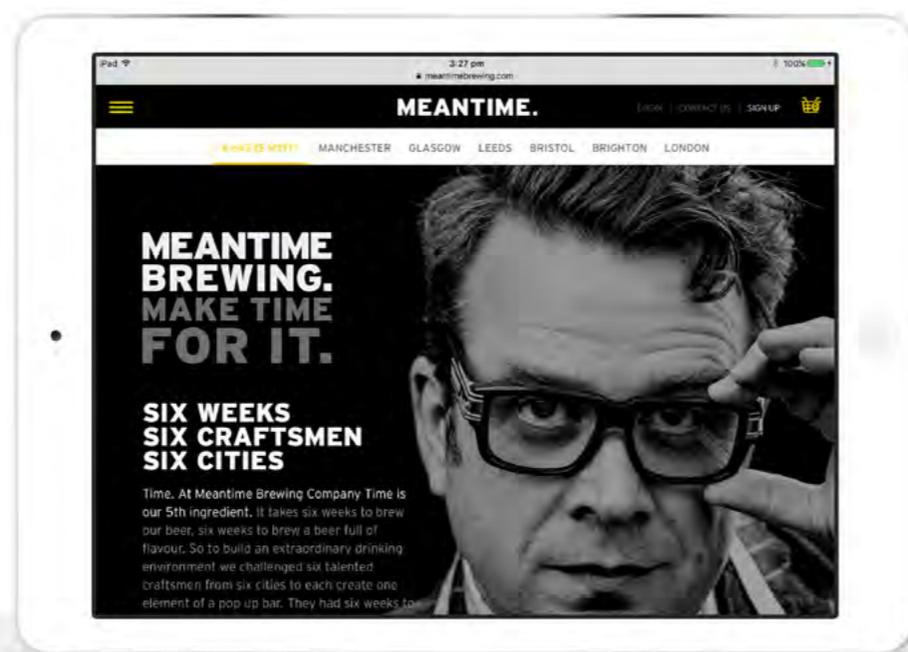


HOW THE ALCOHOL SECTOR IS RESPONDING

Pop-up bars and tasting events have long been part of the alcohol sector's marketing arsenal. But over the last few years the scale and creativity has increased, as each brand tries to one-up the pop-up before.

In March, **Glenmorangie's** Beyond The Cask bar returned to London for a second visit, but this time with more rooms, more whiskies and more to do. The Library room offered an impressive roster of Glenmorangie's whiskies for sipping and relaxing. The wood-adorned speakeasy served up cask-inspired cocktails, and the Vault hosted tastings and rare varieties, including the Glenmorangie 1963, which was only available within this bar.^{31.1}

Our long-term client **Meantime Brewing's** Make Time For It campaign culminated in building the world's smallest bar. Every visitor to the tiny pub received a free pint and a personalised bottle of Pale Ale to take home, under one condition: they had to hand over their phones on entry, so they could appreciate the crafted elements and beer away from digital distractions.^{32.1}



In October **Bombay Sapphire**'s Grand Journey came to London, for a one-off drinking and dining experience. Guests boarded the "Laverstoke Express" for a virtual tour of the 10 botanical locations used to create the famous gin. At each stop, actors, film, music, fragrance and lighting combined to tell a story about the place's botanical. ^{33.1}

"We also wanted for it to be a fun space, for it to have a little bit of theatre, for it to be an experience rather than just a shop visit." ^{34.1}

Tatiana Fokina, CEO, Hedonism Wines.

Far removed from a pop-up, but possibly the finest drinks store in the world, is London's **Hedonism Wines**. With around 11,000 product lines they're certainly the largest, but it's the store's design and their customer service that really sets them apart. Amongst the luxurious and welcoming interior are a secret vault, a kids' area (to keep children entertained whilst parents shop) and their personal ghost, Elizabeth. ^{34.2}

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OUR PREDICTIONS

Brands will launch pop-up retail experiences which sell the lifestyle their brand embodies, rather than just the product. For instance, pop-ups from high-end champagne brands will host tailors or couture dressmakers, jewellers, and furniture makers. On a more playful note, partnerships with food companies will see brands launch alcoholic ice-cream parlours and sweet-shops. The big operators will open 'local' micro-breweries and distilleries, with unique recipes made from local ingredients.

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TREND 6: SENSORY OVERLOAD

CONSUMER TREND

Music has soundtracked dining experiences throughout the ages. Evidence, even if unintentionally, that we understood that enjoyment of food and drink was determined by more than just taste and smell. But it's only since Heston Blumenthal burst onto the scene in a cloud of liquid nitrogen that sensory dining has become familiar, and demanded by consumers.

“Sensory marketing is currently seen as an add-on, but we can see in five years’ time it [becoming] best practice.”^{35.1}

Russell Jones, Creative Director/Co-Founder, Condiment Junkie.



HOW THE ALCOHOL SECTOR IS RESPONDING

Courvoisier's "Célébration Sensorielle" gift packs include two fragrances alongside a bottle of their iconic brandy. The fragrances, designed to heighten the drinking experience, recreate the aromas of the Belle Époque era^{36.1}. **Givenchy** also played on our sense of smell when they teamed up with London's **Cafe Royal** this summer to create 10 fragrance-led cocktails. Drinkers were asked to pick their favourite scent from behind the bar, and were served a cocktail according to that choice.^{37.1}

Moving from smell to sound, the **Brussels Beer Project** brewed a beer to accompany two specific tracks on **Editors'** last album. Researchers found that those who only saw the label on the bottle enjoyed the beer far less than those who also listened to the music^{38.1}. **Stella Artois** conducted a similar experiment, commissioning **The Roots** to write two new songs for them. One song used high-frequency sounds to bring out the sweeter flavours of the lager, while the other used low-frequency sounds to enhance the bitterness.^{39.1}

"One idea is that when you [study] newborns in any animal species, they all stick their tongues out and upwards to taste something sweet, whereas they stick their tongues downwards and away from a sour taste. Our brain may be picking up on that correspondence [linking high with sweet and low with sour] later in life."^{38.2}

Charles Spence, Professor of Experimental Psychology, University of Oxford.

<http://www.prnewswire.com/news-releases/stella-artois-and-the-roots-stimulate-the-senses-with-a-one-of-a-kind-song-you-can-taste-300308562.html>



<http://www.hotelcaferoyal.com/greenbar>



OUR PREDICTIONS

Brands will partner with perfumeries to create limited edition drinks, and will experiment with serving alcohol in other textural forms - ice creams, jellies, crumbs etc. Far closer attention will be paid to the music being played in pop-up bars, with choices being made to improve the drinks not deafen the patrons. Similarly music will be chosen for adverts based on its effect on the drinking experience, not just its suitability to the visuals. And if anyone can do something to improve the smell of city centre pubs when they first open that would be appreciated.

Bubble Lick are hoping our childhood love of bubbles continues into adult life. Their edible alcoholic bubbles come in a pack of six bottles, to which you add any drink you fancy before shaking them up and blowing them into the air. Also sending alcohol into the atmosphere are **Bompass & Parr**. Their "Alcoholic Architecture" pop-up bar contained a cloud of "breathable cocktail" absorbable through breathing and contact with your eyes 40.1. Which led one specialist to conclude:

"The last thing this country needs is another way of ingesting alcohol."^{41.1}

Dr. Niall Campbell, Alcohol Addiction Specialist, Priory Hospital

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Oculus VR

TREND 7: ALTERNATIVE REALITIES

CONSUMER TREND

If you thought **Pokemon Go** was a flash-in-the-pan, think again - it's still making \$2m per day^{42.1}. It brought augmented reality into the mainstream and helped justify the multi-billion dollar predictions for AR and VR (despite the slower-than-predicted growth of virtual reality in 2016^{43.1}). Tim Merel, Managing Director at **Digi Capital**, forecasts that AR and VR will generate \$150 billion in revenue by 2020^{42.2}. So what's the appeal? As the ancient Chinese proverb states:

“Tell me and I’ll forget; show me and I may remember; involve me and I’ll understand”.^{44.1}

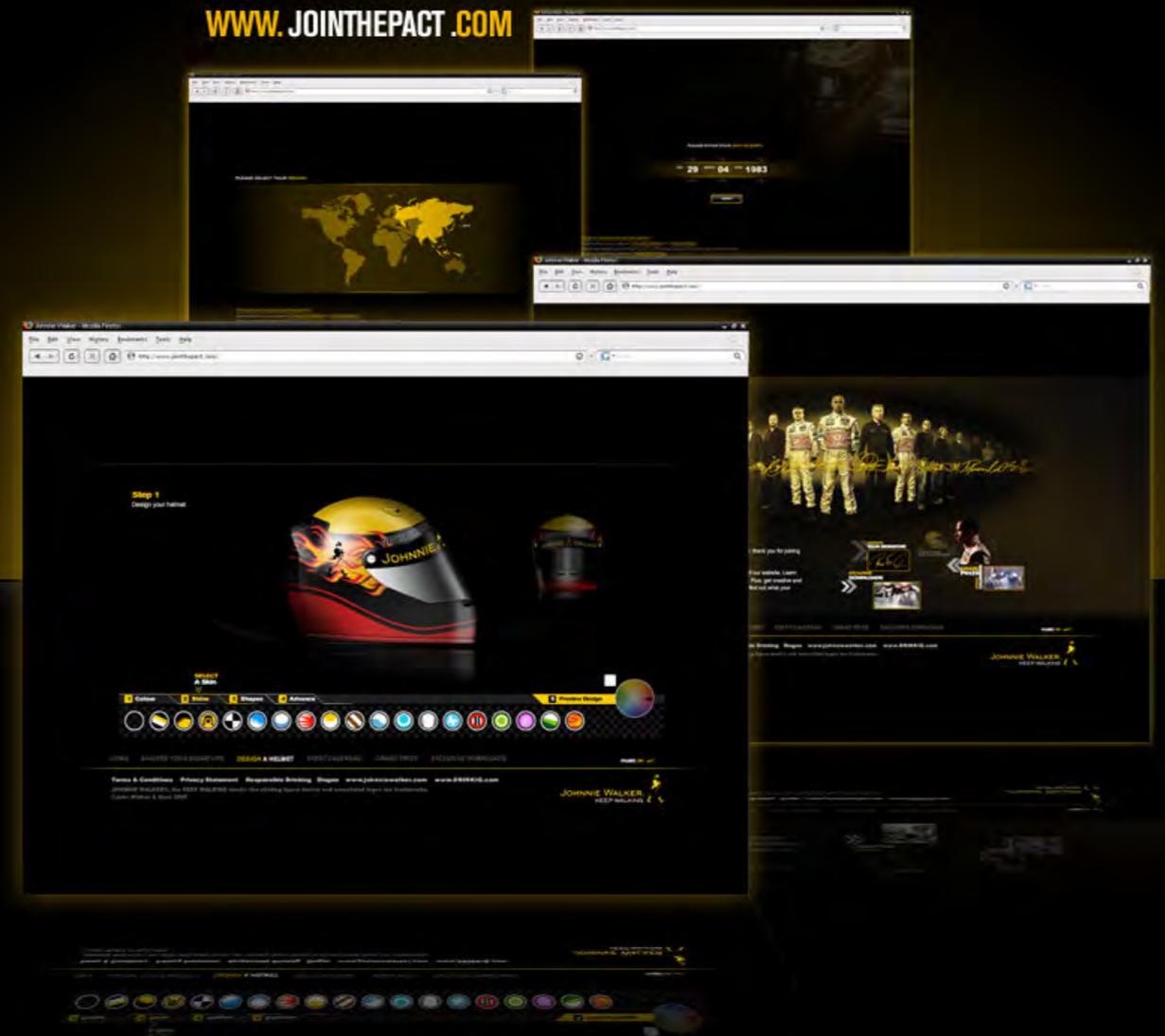
Proverb, Various.



HOW THE ALCOHOL SECTOR IS RESPONDING

In 2015 **Jim Beam** created a 360 roller-coaster like CGI tour of their distillery^{45.1}, and we at Kerve (working with Visualise) created a 360 video tour of **Meantime Brewing's** Greenwich brewery^{46.1}. This use of VR, to educate consumers about a brand's craft, is still the most popular use of the technology amongst the alcohol sector: earlier this year **Glenfiddich** used a mixture of CGI and video to take users on a tour of their Dufftown distillery.^{47.1}

In November, **Diageo** chose to use VR for a very different purpose though. 'Decisions' is the company's "first-of-its-kind" VR experience, that puts the user in the middle of a fatal drunk driving crash^{48.1}. Having chosen from three stories, each about a different group of friends, the user sees, hears, and feels the motivations for and repercussions of their ultimately tragic night out. The app will initially be part of **Johnnie Walker's** 'Join the Pact' CSR program.^{49.1}



“These days, it’s so important to be able to explain how the product is made—in an engaging way—whether you have 5 minutes or 5 seconds with a consumer.”^{45.2}

Rachel Harris, Commercial Marketing Director, Beam Suntory.

If VR's biggest selling point is its immersive experience, AR's is its low barrier to entry - no need for specialist headsets, and cheaper to produce than CGI or 360 video. This easier route to market means brands such as **Jameson Whiskey** have been using AR since 2012^{50.1}; as a means of launching interactive content when users scan billboards, magazines or display ads. More recently, India's **The Beer Cafe**^{51.1} and Meantime Brewing took the same approach with beer bottles.^{52.1}

As **Snapchat** and **Pokemon Go** have shown though, AR can be used as far more than a means of launching content. Due to the ever-increasing power of consumers' smartphones, brands can now add filters and animations to people's photos and videos, overlay geo-specific content on live streams, and create experiences that merge the digital and real worlds.



OUR PREDICTIONS

With its low barrier to entry, AR is the big opportunity. Expect brands to take **Pokemon Go**'s use of contextual, GPS powered content as a starting point. Festivals provide a great opportunity, providing connectivity issues can be remedied. A safer route may be branded tours of cities' cultural spots, such as street art locations.

VR will continue to grow but, with the low proliferation of headsets, brands will concentrate on delivering experiences via Google Cardboard, at gigs, sports events and the like. In these instances the alcohol brand will act as the provider of the content rather than the focus of it, similar to **Budweiser's** partnership with **Cleveland Cavaliers**.^{24.2}

TREND 8: WINE BREAKS FROM TRADITION



CONSUMER TREND

Wine is on the up. While millennials drink less than the generations above them of almost every category, they consumed 36% of all wine purchased last year in the USA (Baby Boomers drank 30%, Gen X drank 21%, and over 69s just 8%)^{53.1}. Not only did they drink more, they drank more expensively: a **Wine Market Council** survey revealed that 17% of all millennial wine drinkers paid over \$20 for a bottle in the past month, compared to 10% of all drinkers^{54.1}. This popularity is due to recommendation apps and younger, less stuffy brands making wine more accessible and relevant to the millennial audience.

“If you look at the millennials, they are the first generation now who are willing consciously to spend more for better quality, for sustainability, for traceability.”^{55.1}

Peter Brabeck-Letmathe, Chairman, Nestlé.



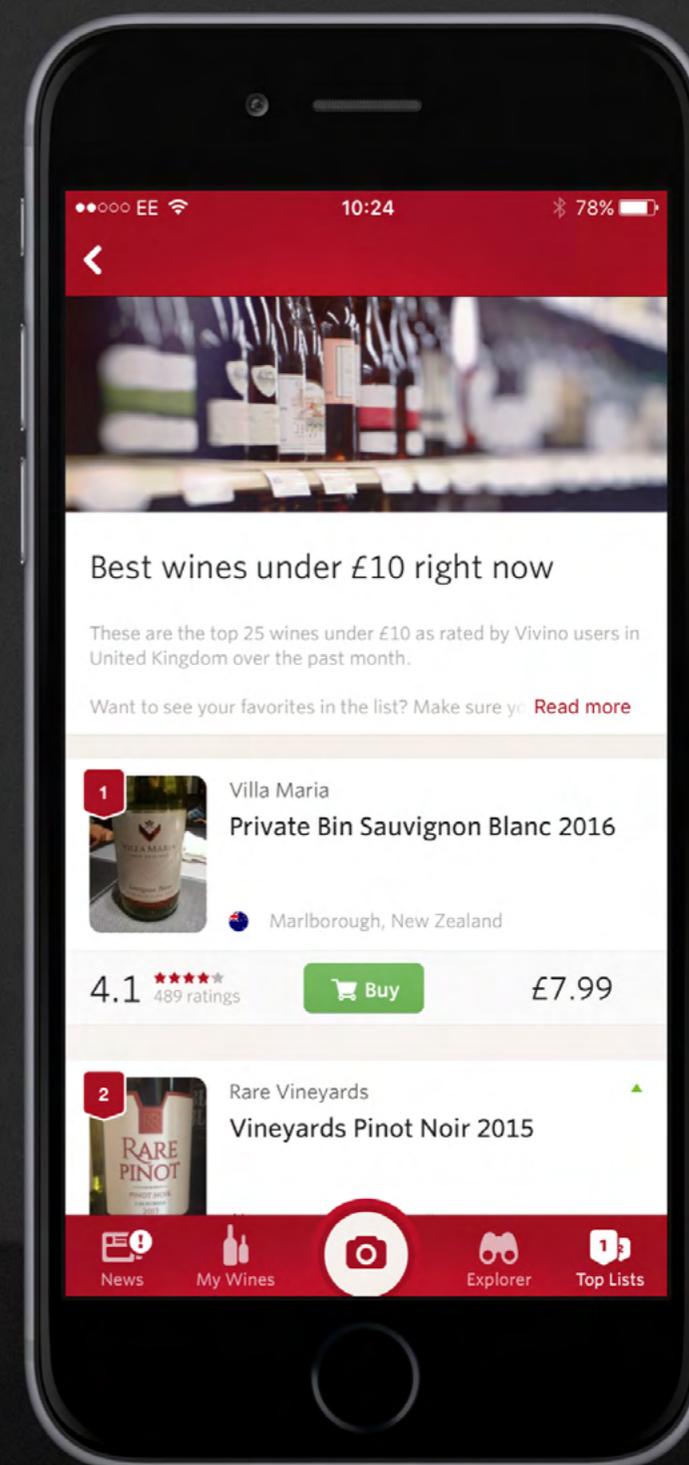
HOW THE ALCOHOL SECTOR IS RESPONDING

Australian newcomers **Cake Wines** are connecting with younger drinkers by behaving like a beer or spirit brand. While their wine comes from the Adelaide Hills they operate from a warehouse in Sydney's inner-west, at which they host DJs, street-food festivals and talks from chefs, other winemakers and artists.

With its daunting range of varieties and overly verbose descriptions, many people are put off wine before they taste it. Technology is helping to break down this barrier. Wine app, **Vivino** has already built a community of 20m by helping them discover, rate and remember new wines. Take a photo of any wine label, or even a restaurant's wine list, and the app will show you the wine's rating, reviews and average price.

Enomatic's wine dispensers won't fit in your pocket like Vivino, but they are helping restaurants^{56.1} and wine merchants^{57.1} offer a far greater range, and more expensive wines, for sampling. Their pouring mechanism prevents oxidation of the wine, extending a bottle's life to over three weeks and reducing expensive wastage^{57.2}. Customers buy a gift card, insert it into the machine and click the wine they want. They get a tasting measure of the wine and the money is taken from their card.

Far less technologically advanced, but proving equally popular with younger drinkers, are wine pouches and cans (such as those from **Union Wines**). Their smaller portion size appeals due to a combination of smaller households, concerns about food and packaging wastage, and people wanting to try a greater range of wines. Packs in the 0-600ml range have a forecast growth of 4.9% vs 1.8% for wine as a whole.^{58.1}





OUR PREDICTIONS

While Australia and the USA have seen a number of new, millennial focused wine brands emerge, the UK is still very much the domain of the traditional wineries. Not for much longer. New wine brands will adopt the marketing platforms of the other alcohol categories, moving into music, street art and street food. Similarly, wine bars will move beyond the 1980's suits and champagne stereotype. Canned, bagged and boxed wine will move past its association with cheap plonk and become standard options for many brands.



A woman with dark hair, wearing a brown jacket, is smiling and looking towards the right. She is seated at a wooden table with several drinks. In the foreground, there are several green and white striped paper cups with straws. A tall glass with a green drink and a sprig of mint is also visible. The background is a busy outdoor setting with other people and a red double-decker bus, suggesting a festival or public event.

TREND 9: THINK SMALL, THINK LOCAL

CONSUMER TREND

The backlash against globalisation which led to 2016's dramatic political changes is also leading to big changes in consumer behaviour. Big is no longer better: consumers want more personal and intimate experiences and products, reflective of their locality. Millennials in particular favour local businesses: 40% of millennial participants in a recent **Edelman Digital** study stated they prefer to shop locally, even if they have to pay a little more for their goods^{59.1}. Done right, hyper-localisation strengthens brand recognition and a company's place in the community, and improves ROI. In the case of **Starbucks'** Chinese localisation, this amounted to a 30% year-on-year increase in sales.^{60.1}

“As the world economy continues to merge into a single market, a problem that all companies are forced to think about is how to run a global business that is also localised.”^{61.1}

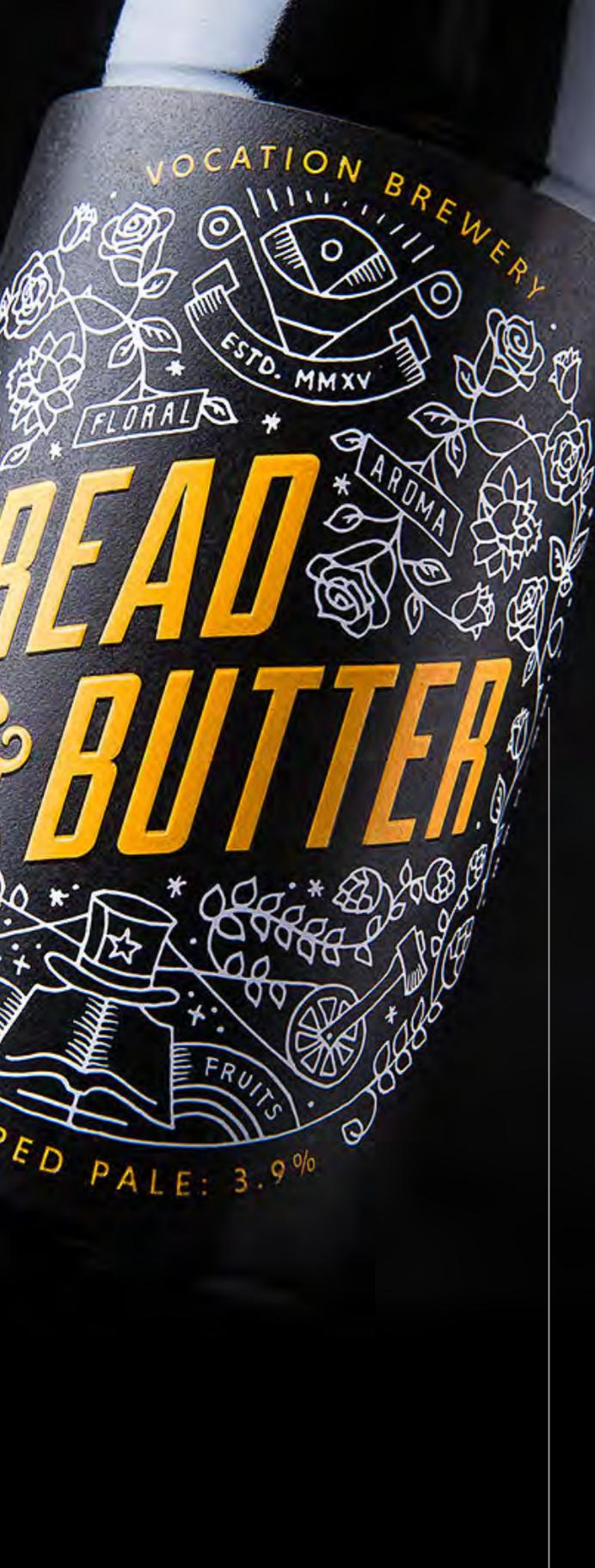
Tadashi Yanai, Chairman, President and Chief Executive, Fast Retailing/Uniqlo

HOW THE ALCOHOL SECTOR IS RESPONDING

A 2015 study by **Nielsen** found that 52 percent of craft beer drinkers said locality was an important factor in their purchases^{62.1}. This preference has helped microbreweries build their businesses on local sales, brewery tours and taprooms, removing the reliance on national retail distribution.

Wine drinkers are far less concerned about locality^{62.2}, perhaps because the product is so closely tied to often distant locations e.g. champagne can only come from the Champagne region of France. As always, there are exceptions: **London Cru** make award-winning wine in Fulham from European grapes. Their hyper-local approach to retail - selling their wine at London restaurants and their Fulham winery - enables them to demonstrate their expertise and passion, converting sceptical consumers.

With 200 stores across the UK, retailers **Majestic Wine** are far removed from London Cru's 'cottage industry'. Yet they too are taking a hyper-local approach to selling wine. They use their customer data to tailor stock within individual stores to the tastes of the local patrons and, where possible, the produce of the area. For instance, customers of their Tenterden store have access to a wider range of wines from the nearby **Chapel Down** winery, because they can source small batches direct from the producer.^{64.1}



“The gap between distribution sales and in-house sales is incredible. Sell a keg to a distributor, you may only get \$110. But if you sell \$7 pints [in your own taproom], you are talking about \$800, \$900 worth of revenue. You can build a very small system, and people will come and drink your beer, and it can be a very sustainable model.” 63.1

David Kushner, Brewing and Cellar Operations Consultant (Castle Island Brewing, Lord Hobo Brewing, Harpoon Brewery)



Despite spirits drinkers' relative indifference about the locality of the producer^{62.3}, the recent £1bn boom in UK gin distilleries^{66.1} owes a lot to the hyperlocal behaviour of the producers. Like many distillers, Yorkshire's **Masons Gin** source their botanicals from their surroundings, including their own juniper bushes. Bristol's **Psychopomp** may source their ingredients from further afield, but their sales model is hyper-local to the extreme. They hand-deliver to the local on-trade, sell directly to consumers from the small bar that fronts their premises, and produce bespoke own-brand gins for Bristol restaurants and bars, with flavour profiles specific to the venue's identity and menu.^{67.1}

OUR PREDICTIONS

National marketing campaigns will become more locally sensitive, helped by big data and the increasing proliferation of digital OOH placements. National retailers will give more prominence to local producers, and producers will put more effort into sourcing (and talking about) local ingredients. Craft breweries and distilleries will become increasingly regionally focused, with only a few big operators chasing national distribution.



TREND 10: THIS TIME IT'S PERSONAL



CONSUMER TREND

Just 10% of consumers find what they're looking for in online content, according to Christophe Primault, CEO of **GetApp**^{68.1}. Hyper-personalised advertising seeks to solve this problem by moving beyond the usual personal data (purchase history, wish lists, promotional emails opened, etc.) to look at customer's wider interests, opinions and attitudes, values and behaviours^{69.1}. For instance, **Spotify** users who listen to a 'Morning Run' playlist may receive ads for running shoes.

“I don't want to buy only pink plastic necklaces just because I bought my niece a birthday present last week... Segmenting too broadly, using generic messages and not appreciating a customer's context results in ineffective personalisation.”^{70.1}

Alex Cowell, Chief Technology Officer, MBA.

But hyper-personalisation can do more than serve ads. The internet of things, wearables and the application of scientific data are combining in products that heighten the personal experience. **Nadi X** leggings use Haptic vibrations to tell wearers whether they're exercising with the right form, while **Here One** earbuds give you the ability to control the volume of real world sounds, filter out noises you don't want and even remix what you're hearing.



HOW THE ALCOHOL SECTOR IS RESPONDING

Absolut recently announced the winner of a competition to design a new bottle that uses data and the internet-of-things to personalise the drinking experience. New York agency **Huge** took the top prize, with a design that allows users to record a personalised message that plays when the bottle is opened. Other entries included a cap that unscrews only for designated fingerprints.^{71.1}

While Absolut focused on personalising the package, two wine start-ups promise to personalise the drink itself. **Cambridge Consultant's** new Vinfusion app enables drinkers to customise a blend of wine to their palate. You choose from terms like 'full-bodied' or 'light', 'dry' or 'sweet'. Vinfusion's algorithm then creates a matching blend from the four base varieties identified during chemical analysis of a wide range of wines.^{72.1}

Still not personal enough? Then how about a wine based on your DNA. Send **Vinome** a swab and, using ten genetic markers related to smell and taste, they'll send you a bottle from their Californian winery based on your 'Vinome' - your unique taste profile^{73.1}. This mitochondrial-level of personalisation doesn't come cheap though: the genetic testing service costs \$199 and each bottle of wine \$65. Some, such as medical geneticist Dr. Jim Evans, aren't convinced:

“It's just completely silly. Their motto of 'A little science and a lot of fun' would be more accurately put as 'No science and a lot of fun.'”^{74.1}

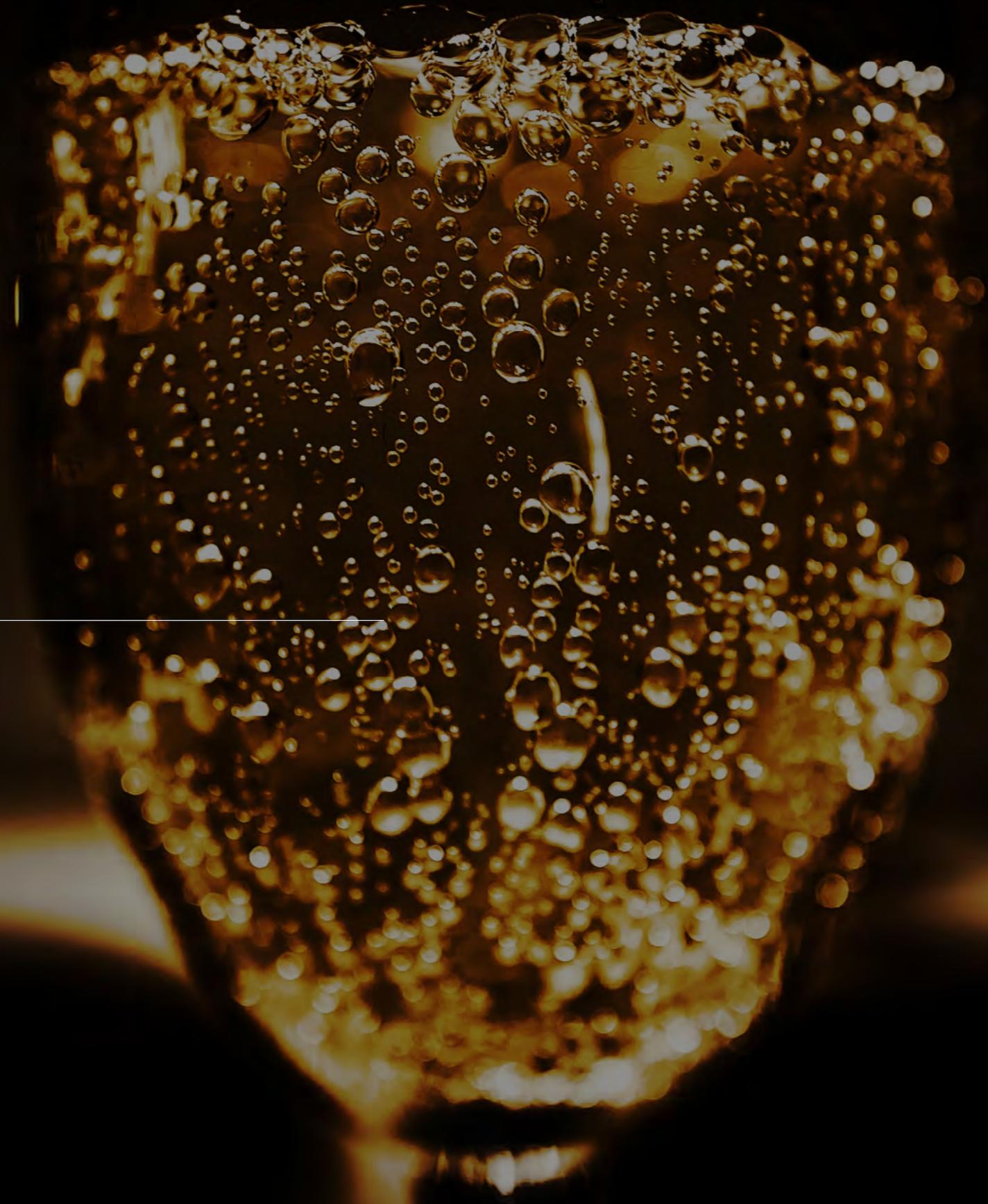
Dr Jim Evans, Professor of Genetics and Medicine, The University of North Carolina.



OUR PREDICTIONS

The features of Absolut's bottle will appear across many other brands' packaging. Breweries and distilleries will enable customers to create their own drinks in micro-runs, either via their websites or at tasting sessions at their taprooms and venues. Once the excitement of personalised labels wears off (and thus the ability to sell them disappears), customers ordering direct from brands will receive personalised bottles as standard.

CONCLUSIONS



The quality and range of products has increased dramatically across the alcohol sector over the past few years. The renewed focus on craft and ingredients has been triggered by the booming independent distilleries and breweries. Meanwhile younger drinkers started drinking less, but choosing premium lines when they did. The best news for the consumer is that the big brands have responded, with new flavour variants and healthier recipes.

Into 2017 we can expect to see the range of alcoholic drinks continue to increase. Hard sodas will make a serious entry into the UK market following their US success. Premium tequilas will also look to replicate their success across the Atlantic, challenging gin's resurgence. New, millennial-focused wine brands will appear in unfamiliar packaging formats. And 'healthy' variants such as gluten free beers will move into the mainstream, while alcoholic juices will begin to appear on retail shelves after their success at pop-up bars.

Big brands' marketing will become hyper-localised in response to the backlash against globalisation, while small brands will hyper-localise their entire business models. The 2016 marketing favourites, VR and pop-up bars, will remain prevalent in 2017, but with creative focused on the brand values and associations, rather than the product. Augmented reality will move beyond placemats and print ads to GPS powered experiences; sensory marketing will become far more commonplace, and packaging will see more playful experiments and tech-led hyper-personalisation.

Hyper-personalisation is also the theme behind the innovation we're watching out for in 2017: can a brewery or distillery enable consumers to brew a customised version of their drink? The first one to do so will set the bar for the industry to follow.

If you'd like help meeting the consumer demands and marketing trends discussed in this report, we'd be delighted to chat about the creative opportunities and technological solutions.

Sam Taylor - Client Services

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Kerve Creative Ltd

ABOUT KERVE



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The Kerve studio is a place where creativity and technical whiz-kiddery thrive. Over the years, we've built a unique team of super-talented people, with a massively diverse set of skills. We're digital inventors, makers and producers, with an eye for detail and a focus on creating beautiful, seamless, high quality work.

We've built mind-control cars, augmented reality mirrors, giant doughnut ATMs and, in December 2016, a contactless beer pumps for Barclaycard. That's not to say we've forgotten websites, games, and apps though. We choose the right solution for the brief, with no creative limits.

We're here to excite audiences with memorable experiences, building breath-taking interactive campaigns that bring people closer to brands.

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