



10 Trends that Are Impacting the Wine & Spirits Industry

And how analytics can help you better
understand the market



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Introduction

In this day and age, selling in the wine and spirits industry is tougher than ever before. Trends that are now driving sales and growth were not prevalent 10 years ago.

Factors such as direct-to-consumer sales, new technology, and changing customer demographics have all turned the industry on its head. It's more competitive than ever before, and there are new ways to reach the buyer.

Technology is helping companies create, produce, and market their brands better. More than ever, consumers care about what's in their alcohol and the values of the brand. And now brands have a chance to sell directly to their consumers.

How can you help your brand adapt to the changing market? Data is key, and there are mountains of it available to you if you know how to find it. By better analyzing this information, you can get a better handle on who your customer is and what they prefer. This will lead to increases sales and greater market share.

Let's examine some of the most prevalent trends in wine and spirits today, and the impact that data and analytics could have on your business.

Trend 1: The Changing Consumer

Alcohol producers must adapt to serve the profile of a new consumer, as the current market is rapidly changing.

In the wine industry, total volume of sales decreased last year, but total dollars spent increased. The younger generations are buying less on impulse, but they are drinking more when they do buy.

Beer and hard-liquor drinkers are reaching for more craft products. But they also want to know what's in these products.

Why is this all happening? Because Generation Z finally turned 21 years old and can purchase alcohol.

Millennials — people who were born between the 1980s and the turn of the century — are a large target for brands.

Millennials prefer experimentation and care how the label looks, but they also want quality. They don't focus on brand loyalty as much as the "feeling" they get when purchasing wine.

For higher-priced labels, Generation X consumers—people born between 1965 and 1980—are the perfect target, as they are starting to spend more on the wine they consume and control the majority of the market share in dollars spent.

Traditionally, Generation X and their predecessors, the baby boomers, were predictable in their buying patterns and had regulated consumption. However, baby boomers are starting to purchase less because they're aging out of the wine industry for mostly health and budgetary reasons.

Millennials are looking for brands that match their values, such as supporting local breweries and distilleries or organic vineyards. Millennials also tend to be more health conscious, so if they find a brand they perceive to have fewer calories or carbohydrates, they may switch labels.



The new consumer has less brand loyalty than previous generations of customers. 71% of the baby boomer generation used their previous experiences with a wine label when making a new purchase. This statistic is drastically down with millennials, who only use past experiences to influence their next purchase 43% of the time, according to a Nielsen report.

The new consumer does stay loyal when the product is quality. This is seen as both reflecting their values and being convenient for them to purchase. So brands can gain the loyalty of millennials—it just takes a bit more work to market what your brand stands for.

The younger generations are also exploring alcoholic beverages beyond wine. That includes ciders, beer, and mixed drinks, meaning the wine market needs to adapt.

71% Baby boomer gen used previous experiences with a wine label when making a new purchase



43% Millennials used previous experiences with a wine label to influence next purchase



How you can use analytics to address this trend

Analytics can enable your brand to collect data on who your average customer is, how much they're spending, where they're buying your products and how often they're making a purchase.

Since buying behaviors are morphing as the wine buyer does, using the data will help your brand identify trends early.

By analyzing these data points, you'll be able to start seeing patterns emerge across the generations of your customers, and then make marketing decisions to help expand your reach.

Using social media data can also help you also understand how your customers are interacting with your brand, and then your team can make better decisions about the feelings your customers want when drinking your wines.



Trend 2: New Technology

Technology continues to rapidly change almost every industry, with no exception for wine and spirits.

For example, wineries are using technology to produce better products and provide a better customer experience. On the vineyard, the buzzing you hear on Kendall-Jackson's estate isn't the sound of bees—it's drones.

"We have two drones, and they're pretty busy," Randy Ullom, winemaker at Kendall-Jackson told *Wine Enthusiast*.

The drones have a lot on their to-do list. They help with marketing, security, surveying, and crop analysis. The drones can help map the vineyards through photos and then can alert the winemakers to any threat to the vines.

Drones can also fill in when there is a labor shortage or help redirect human labor to more valuable tasks. For example, it would take four workers an entire day to spray a field to ward off infection. Drones can do this more quickly, allowing the workers to prune vines or do other activities.

From high-flying drones above the vineyards to smartphones scanning product labels, technology is improving your latest glass of red or your Friday night cocktail.

In the spirits market, on-demand delivery apps can bring a bottle of tequila to your front door when an impromptu margarita party starts.

Spirit drinkers can even see pictures of what the cocktails will look like, and the ingredients listed on the app. To boot, tablet ordering is allowing spirits producers to better understand who is consuming their products and where.

Restaurants and bars are also using new technology to improve business. They now offer customers the option to order off of iPads or tablets. Uncorked claimed a 20% increase in wine sales for bottles that had photos of the labels and tasting notes on the menu. Labels can start using this to their advantage by providing interactive content for prospective customers.



The way bars and restaurants serve wine is also morphing with updated technology. To save money and provide a better by-the-glass experience for customers, wine is now being served on tap or in an Enomatic or Eurocave.

Traditionally, being on-tap was reserved for beer. Wine was served only by uncorking bottles, and could potentially spoil if left open for too long. Stainless steel serving options like taps provide protection for the wine and allow restaurants to have many expensive bottles "open" at once for consumption. Since less wine will spoil, the per-glass price can now also be less for the customer.



20% increase in wine sales for bottles that had photos of the labels and tasting notes on the menu.

How you can use analytics to address this trend

While buying a drone might not be practical or affordable for your vineyard, there are still plenty of ways to ensure your business doesn't get left behind in the wine-tech revolution. Analytics can turbocharge many other technology investments.

- Look into adding a QR label to your next production of wine labels. This way you can not only transport customers directly to your website, but you can also track who is looking at and buying your product.
- Reach out to apps such as Vivino, and make sure if a user scans your label, your information is there.
- Have your sales reps catalogue which restaurants and bars have smart-menus on tablets or iPads. Consider writing an extra blurb about your winery to add to the menu at these eateries. Then, track your sales at restaurants with iPads vs. at those without.



Trend 3: Healthy Wines & Spirits

Enjoying a nice glass of wine or an evening cocktail is a great treat, but many drinkers are starting to worry that their favorite chardonnay or mixed drink might be setting them back at the gym.

You've heard for years that a glass of red wine can be good for the heart, but the sugar and carbs could contribute to different health issues.

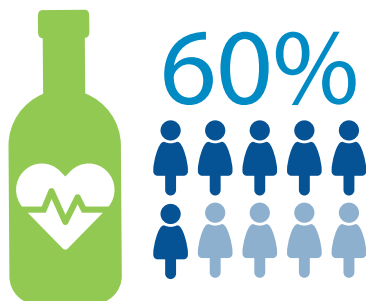
Wine companies are capitalizing on consumers' desire to stay fit, but still drink, by offering low-sugar and low-carb wines as a part of their portfolios.

The total volume of wine consumed decreased by 1.2% last year, which is the first time this dipped in nearly 26 years in the United States, according to Wine Vine Analytics. Experts are attributing this decrease to health-conscious millennials and Baby Boomers.

Consumers are being inundated with diet trends such as the Keto diet. "Going Keto" is the epitome of low-carb, and having more than a glass of wine could derail your body's ketosis, which causes it to stop burning fat.

Women—historically an over-marketed target population—consume 60% of all wine now, making them an ideal target for "healthy wine" marketing.

Brands are listening to the health trends and making products to match. While it's illegal in the United States to advertise any "health benefits" of wine, brands are seeing that consumers are attracted to descriptors such as "gluten-free," "low-carb," "low-calorie," and organic.



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WW (formerly Weight Watchers) launched its own brand of wine called "Cense" a couple of summers ago. WW users track food and drinks using points allocated based on the caloric density. Typically, a glass of wine was worth four points; the Cense brand is worth three. In caloric terms, one 5-oz serving is about 80 calories while a typical glass of wine may have more than 140.

The brand Fit Vine boasts a variety of 10 different wines that have less sugar, fewer sulfites, and no flavor additives. The brand's website says, "We love our workouts, but we also love our wine! ... We're proud to say we've created great tasting wines to enjoy tonight without sacrificing tomorrow."

The spirits industry has seen the benefits of showcasing their low-carb or "skinny" cocktails. Brands such as Skinny Girl Cocktails have been around for years targeting women drinkers with lower-calorie vodka and low-sugar ready-to-serve cocktails.

How you can use analytics to address this trend

Overall, consumers are looking for healthier options, so thinking about this trend and recognizing it's here to stay will be key in your long-term planning.

While it's likely not practical to revamp your entire spirits or winemaking process to reduce sugar, think about adding information to your label so consumers can understand what goes into your products. Use analytics to figure out your target customer and what that person is looking for in an alcoholic beverage.

If you do happen to have a line of dry wines, consider marketing them to be "keto-friendly," playing into the new diet craze.

Also, do your research. Using analytics to more closely examine data trends can provide insight as to what types of grapes you should be planting and wines you should be producing in the next three to five years. Spirits suppliers can better understand which beverage types are trending, and expand production of those beverages over time.





Trend 4: Enotourism

There's nothing like a great vacation—especially when there's alcohol involved.

Enotourism, which is travel aimed at wine regions, has been booming for nearly a decade now and is continuing to rise. Wine lovers are willing to travel for great wine and a great experience.

Wine and food tourism is the primary reason given for nearly 600,000 trips to Europe annually, according to the UN's World Tourism Organization. Seeking good food and wine was the secondary reason for travel for another 20 million trips.

Wineries are taking note of travelers seeking out great experiences and are investing in tourism facilities to attract them. In Europe, for example, the nearly \$90 million Cité du Vin towering next to Bordeaux City Centre, or the Rubik's Cube-inspired d'Arenberg Cube in McLaren Vale, South Australia are big tourist spots.

Here in the United States, the number of wineries has grown dramatically since the 1980s. There are now nearly 10,000 wineries and they're providing good reasons for travelers to seek out their wines. Nearly 15 million travelers are motivated by wine each year in the U.S., according to the Mintel Group. And in 2013, nearly \$20 billion in revenue was generated in the U.S. by wine tourists.

Tourists who prefer hard alcohol are also willing to travel. Owners are investing in their distilleries, with the total investment in the industry increasing by more than \$190 million, to \$590 million in total. The money spent on improving distilleries doubled from \$299 million in 2015. The investments were used to build out the tasting rooms and other visitor experiences, as well as equipment to increase production capacity.

How you can use analytics to address this trend

Wine lovers want to drink wine that provides them with a unique experience and matches their values. You can learn more about just who your customer is by examining your data. The laid-back wine drinker would love yoga on the vineyard and the adventurer would want to be able to explore the winery. Think about what values your brand has and how that matches up to your customer base.

When planning an event at your winery, first ensure it's cost effective. For example, starting with yoga will only cost you the price of an instructor. Then, you can upgrade to hosting a larger event. After the event, use analytics to do a comparison to evaluate if your sales increased and whether it was worth the cost.

Attracting patrons to your vineyard with events is a great way to also increase your direct-to-consumer sales channel. If you have a wine club, you can encourage visitors to join, or you could offer a special 10% discount on cases of wine that day for anyone visiting and attending an event. Again, analytics can help you evaluate whether the cost of such events is worth the payoff.



Nearly \$20 billion in revenue was generated in the U.S. by wine tourists.



Trend 5: Direct-To-Consumer Sales

Wineries are cutting out the middleman and selling directly to consumers—and Americans are loving it.

With wine shipping laws evolving, more wineries are allowed to ship directly to the consumer than ever before. The winery direct-to-consumer (DTC) channel hit \$3 billion in 2018, up from \$2.66 billion in 2017, according to Wine Vine Analytics. The channel is forecasted to grow around 11% a year, reaching \$5.2 billion by 2022.

Currently, the DTC channel only comprises 2% of the total US market in terms of volume, but the rapid growth of sales volume—15.5% in 2016 to be exact—suggests there is huge potential in this channel for wineries.

In 2018, wineries shipped more than 6 million cases of wine directly to consumers. This is an increase of 9% from 2017. When buying directly from the wineries, consumers are willing to pay more. The average price-per-bottle in these cases increased as well, to \$39 a bottle.

The Sonoma and Oregon wine regions saw a 19% growth of their direct-to-consumer channel, and Washington followed with a 13% growth in sales. Sonoma leads the pack with the most cases shipped to consumers at 1.8 million.

The most commonly shipped wines were cabernet sauvignons, pinot noirs, and red blends. But shipments of rosé skyrocketed 24% in 2018, and increased 200% since 2010, according to Sovos.

While jumping on the DTC bandwagon may seem like a strong sales tactic, there are many regulatory hurdles that wineries face.

Each state has different laws about shipping and receiving alcohol. So, while it's OK to ship wines from California, you are not allowed to ship them to Alabama. This can disappoint customers, so you should train your staff to be familiar with these regulations.

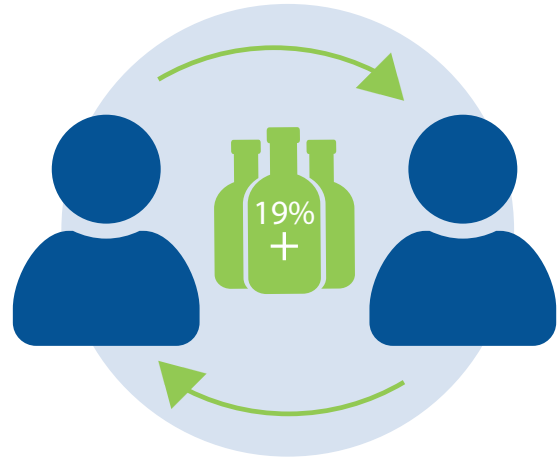
How you can use analytics to address this trend

Analytics can help you understand the potential sales from a DTC channel, and who might be interested in purchasing your products.

If you're looking to start a DTC channel and you have a tasting room, you can start with a small goal of how many cases you'd like to ship. You can also look at your tasting room visitors to better understand their demographics, preferences, and frequency of purchasing.

Offering your direct-to-consumer channel strictly to winery visitors is a nice exclusive marketing trick to increase sales, but ensure your volume is manageable. Be sure to have a system that helps you track repeat customers and increases in sales.

As you increase sales and shipment, you can later decide to offer online sales of your wines. Here analytics can help you better understand the optimal markets for distribution.



The Sonoma and Oregon wine regions saw a 19% growth of their direct-to-consumer channel.

Trend 6: Labels

Labels are a dominating factor for consumers deciding which wine or spirits to buy in stores.

Wine drinkers want more clarity with their labels: 36% say they are confused by wine labels and 81% want the labels to be clear and easy to understand, according to Wine Vine Analytics. Those looking to purchase hard alcohol also are drawn to brightly colored bottles.

Alcohol suppliers are now using better labels to draw in new customers and tell them what their brand is really about.

Nielsen released a study that evaluated the effectiveness of wine package designs for 34 select top-selling and up-and-coming wines among 2,700 U.S. consumers. The goal was to highlight brands that are using label and packaging designs to win business from the liquor store shelf in a matter of seconds.

The study found that consumers gravitated toward brightly colored labels, such as red, orange, or gold for wine that cost less than \$20 a bottle. For wine priced at more than \$20 a bottle, consumers wanted a more traditional aesthetic, with bottles that had a bold or contrarian look.

A consumer's age also determined which bottles they found more attractive. Millennials were drawn to the more fun, colorful, and adventurous labels.

It's not just the labels that are catching consumer's eyes—it's the overall packaging. For example, Milagro Tequila has a glass-blown pineapple in the middle of the bottle.

Wine in a can is also having a big moment. In the United States, year-over-year sales of canned wine are up 43%. Drinkers want wine that fits their on-the-go lifestyle, so portable wine that doesn't need a glass is highly appealing to them. Plus, cans allow companies do a full 360-degree wrap-around label that helps tell their story even further.



How you can use analytics to address this trend

Your packaging and wine label tell a story to the consumer who has never tasted your product before. If you think you might need a label upgrade, consider using analytics to get a better sense of who your customer is (or who you want to target), and design the label with that person in mind.

You can also use survey analytics by polling people at your tasting room or the next time a salesperson is in a liquor store. Ask them what the label says to them. Does it catch their eye? Then, based on these findings, decide if you need an upgrade.

You might be hesitant to redesign your packing, but here are a couple ways you can ensure your bottle stands out on the shelf:

- Is it easy to add a punch of color to your label? Analyze the costs for your next round of production.
- Does your label tell a story? Consider adding a paragraph about what your brand is about.
- Host a contest among your customers. Ask customers to submit designs for your wine label. Set expectations, such as color usage, and then produce that label on a limited run of bottles.

If you have the funds, consider hiring a design agency to revamp your label. While it may cost more up front, it should increase sales when the bottles hit shelves.



In the United States, year-over-year sales of canned wine are up 43%.

Trend 7: Drinking In

A perfect day for any wine lover can range from drinking wine on the front porch, to sharing a homemade dinner with friends while sipping on a Malbec, to grabbing wine in a can and bringing it to the beach.

Spirits lovers might savor a scotch on the rocks while watching TV, or enjoy a margarita with friends at a house party.

With the price-per-glass of wine in a restaurant often surpassing \$15, it's no surprise that more than 80% of all wine consumption is happening off-premises, according to LEK Insights. Drinking at home is an increasing trend in wine and spirits and it's impacting how suppliers should think about doing business.

Millennials are leading the charge of drinking in. In fact, 47% of millennial drinkers said they would rather drink at home than at a bar, restaurant, winery or social gathering. Millennials are unwilling to pay the hefty markups of wine in restaurants and bars. In fact, 57% said that cost was the main factor in deciding what to drink.

Another reason to not go out? 28% of millennials said it was just too much effort.

Technology is making it even easier to drink at home. In major cities, consumers can download apps such as Grizzly and UberEATS, and have wine at their front door in under an hour, without having to leave their couch. More and more local liquor stores are also offering delivery.



How you can use analytics to address this trend

Some companies are playing in to knowing their brand is consumed at home. One way that brands do this is by posting pairing suggestions near the shelves of what their wine would go well, or even having the entire label revolve around it.

If you want your brand to be the drink of choice for at-home-drinkers, there are a few things you can do:

- **Label it:** Have an eye-catching, bright label to grab the attention of shoppers in the store. Highly visible labels were noticed 77% more often.
- **Market it:** Consider your in-market strategy as a way to get your customers to drink your beverage at home. This can range from creating a poster that shows an ideal party platter to go with your wine, to suggesting which cheeses pair best with it.
- **Tech:** Reach out to apps such as Vivino and make sure the details of your wine can be found in their database. This way, if a consumer scans your bottle in a store or restaurant, they'll be able to see notes and save it for later. Analytics can also enable you to see who is scanning your label and what the ratio of scans to sales is.



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Trend 8: Resurgence of Spirits

Millennials love old-fashioned drinks—especially ones made with premium whiskey.

The spirits market is having a resurgence, and growing at unmatched rates. Spirits now account for 37.4% of the beverage alcohol market. Volume is up 5 million cases from last year, and this segment of the industry saw its ninth-consecutive year of growth, totaling \$44 billion in sales. And millennials are the spirits industry's biggest customers.

Just 29% of all legal-aged drinkers are considered millennials, but this group is purchasing more than 32% of all spirits. They're also buying the fancy stuff.

After a few steady years of overall economic growth, consumers, particularly millennials, are seeking high-end, premium products to drink. From 2012 to 2017, premium spirits sales grew 7%.

Vodka remained the sector's largest category, representing one-third of all spirits sales. Vodka revenue was up 2.9% percent from last year, totaling \$6.4 billion in sales.

Premium American whiskey and tequila also saw substantial sales growth from last year. As more consumers crave craft cocktails, whiskey and tequila are spirits of choice for a unique flavor.



How you can use analytics to address this trend

If you're looking to grow in the spirits market, build a social media presence for your brand. It's a strong way to show your current customers, and prospective ones, the type of experience they can have drinking your product. You can also use analytics solutions to determine what types of spirits are selling best—and which aren't—and using that to plan ahead. Analytics can also enable you to forecast trends so your new brands hit the market in time to cash in on them.

If you run a cocktail bar, you can consult with your staff and mixologists on new craft cocktails that will draw customers to your locale. Track the success of these cocktails in terms of sales. If you're on the brand side, you can use your data to suggest mixers that would go well with your leading spirits, encouraging customers to order those drinks while at the bar.

37.4 %



Spirits now account for 37.4% of the beverage alcohol market.

Trend 9: Women and Wine



Women are buying and drinking more wine than ever, with 57% of total wine volume being purchased by women, according to Nielsen. The survey showed that, overall, more women are buying wine and drinking it more frequently—and in larger quantities than their male counterparts.

With women dominating such a large market share of wine purchases, wine labels are wise to use data on women's purchasing behaviors to their favor.

The average female wine drinker hails from the millennial generation and is a professional. She cares about the environment and wants her wine brands to share her values. A majority of 21 to 24-year-old women who purchase wine said that organic and sustainably produced products were important.

The average woman drinker does most of her drinking at home, surrounded by family, friends, and food. She's drinking wine at dinner. She doesn't even mind drinking alone with a bowl of popcorn and Netflix. A woman's preference to drink at home shows in the data trends—more than 80% of wine consumption is now happening off-premise.

How a bottle looks matters to women. The average woman wine consumer will rate "traditional, classic, and sophisticated" labels more intriguing than other types of labels.

She is more likely to purchase a bottle of wine she has never tried before based on the label, further backing research that packaging and labels are becoming more important than ever in a brand's success.

How you can use analytics to address this trend

What are the takeaways for wine producers? As a label, if you're looking to expand your market share among women, consider these steps:

- Use the data to determine which wine varietals are more appealing to women. If you're able, you can consider a specific line of wines targeted directly toward women drinkers.
- Once you've determined which brands women are more prone towards buying, alter your label to be more attractive to female shoppers. Consider doing a test group of women-only drinkers to evaluate your label.
- Train brand staff in stores to inform shoppers about the perks of your brand, or train store employees to do the same. Well-trained staff will be able to make recommendations to female shoppers. You can then examine your data to see sales in different outlets to determine if your efforts were worthwhile.



57% of total wine volume is being purchased by women.

Trend 10: Premium Wines



Consumers want to enjoy a nice glass of wine—and they're willing to pay up for it.

Wine purchasing trends show Americans are drinking less overall, but spending 3.7% more on their wine, which suggests drinkers desire a higher-quality wine and are willing to spend more per bottle.

The "Fine and Premium" wine category, defined as wine priced at more than \$10 a bottle, has grown approximately 8% a year since 2012.

Premium wines are on the rise because of the experience they provide. Drinkers spent \$17 billion on premium wines in 2017, and that number is expected to keep growing.

Silicon Valley Bank predicts this segment of the industry will grow between 4% and 8% in 2019. This trajectory is expected to continue, with the segment reaching around \$25 billion by 2022, according to Consulting.us.

The term "Premium Wines" encompasses four categories:

- Popular Premium
- Premium
- Super Premium
- Ultra Premium

These wines range in price from \$10 to \$15 for Popular Premium and then up to \$30 to \$40 for Ultra-Premium.

Customers expect their "premium" wine to be of exceptionally high quality, so consumers won't pay a top-price for a wine that doesn't live up to that standard.

Consumers are willing to pay more for a higher-class experience, and millennials are modeling this behavior more than any other group.

Millennials crave new experiences, and that also translates to their wine. To millennials, the experience they have drinking their wine is important, so they're willing to pay extra for it.

How you can use analytics to address this trend

If you don't currently have any labels in the premium wine market, there are a few things you can do to break into this sector.

If you have a fan-favorite wine that's not considered premium, but the price point is close, think about if you can rebrand the label and push it into the premium category. You can also use analytics to compare various price points and determine how raising the price would impact your sales.

If you're a larger winery and have a new vintage coming out, you can consider selling that vintage or blend at the premium level—but remember the taste needs to match the price.

If you survey your current consumers, you can use that data to see exactly what your customers are looking for in your brand and how you can deliver it.



Wine purchasing trends show Americans are drinking less overall, but spending 3.7% more on their wine.

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About Dimensional Insight

Dimensional Insight® is a leading provider of analytics, data management, and performance management solutions, offering a complete portfolio of capabilities ranging from data integration and modeling to sophisticated reporting, analytics, and dashboards. Founded in 1989, Dimensional Insight has thousands of customer organizations worldwide. Dimensional Insight consistently ranks as a top performing analytics organization by customers and industry analysts in its core market segments including healthcare, manufacturing, and beverage alcohol.



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