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# London Influencers Report

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***EXTRACT from CGA Strategy, October 2016***

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# Contents

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- **Methodology & why London?**

- **Key findings for Campari and Aperol**

- **Drinks trends and proliferation to the mainstream**



## Methodology

**100**

*Outlets visited*

**14**

*In-depth London Influencer  
bartender interviews*

**16**

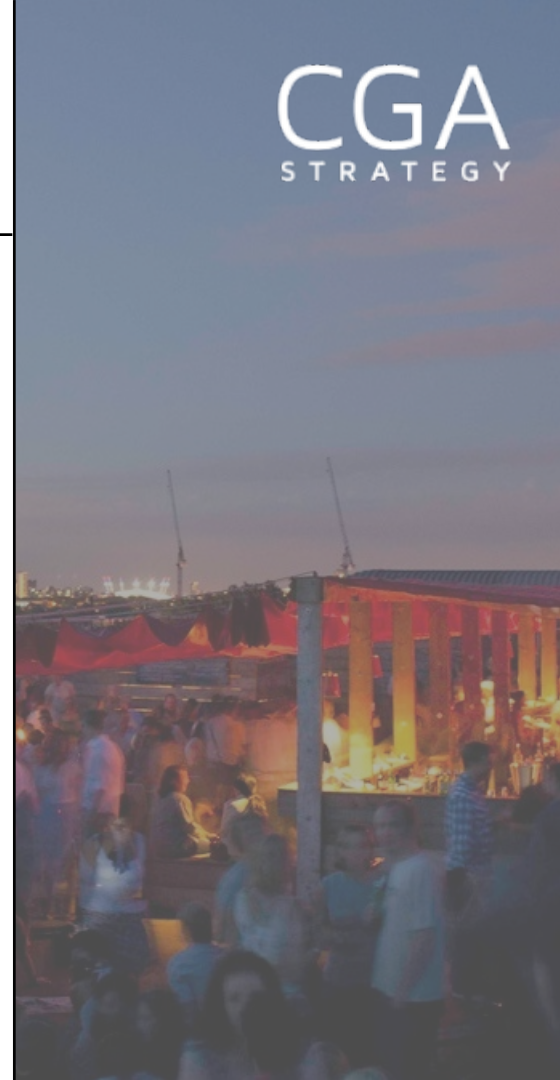
*In-depth London Influencer  
consumer interviews*

**42**

*Influencers  
leaders surveyed*

**111**

*Influencers  
consumers surveyed*





# List of 100 outlets included in the research

100 Islington  
68 & Boston  
7 Tales  
American Bar  
Angler  
Barrio Central  
Barts  
Basement State  
Beaufort Bar  
Berners Tavern  
Birdcage  
Black Rock  
Blacklock  
Blakes Hotel  
Blind Pig  
Blues Kitchen  
Botanist  
Botanist  
Brewdog  
Bull In A China Shop  
Cahoots  
Callooh Callay  
Chancery  
Chelsea Prayer Room  
Chicken Liquor

City Social  
Coburg Bar  
Cocktail Trading Co  
Connaught  
Coya Restaurant And Bar  
Craft Beer Co  
Crown & Shuttle  
Dandelyan  
Discount Suit Company  
Dishoom  
Draft House  
Draft House  
Draft House  
Draft House  
Drake & Morgan  
Duck & Waffle  
Earl of Essex  
Experimental Cocktail Club  
Found  
Gibson Bar  
Gun  
Ham Yard Hotel  
Happiness Forgets  
Hawker House  
Hawksmoor (Commercial Street)

Hawksmoor (Langley Street)  
Holborn Whippet  
Hoxton Tandoori  
Islington Assembly Hall  
Joyeux Bordel  
Jugged Hare  
Ladies And Gentlemen  
Little Bat  
Lobby Bar  
London Beer Dispensary  
Loves Company  
Low Slow & Juke London  
Mark's  
Meat Mission  
Meatliquor  
Meatliquor  
Mermaid Oyster Bar  
Milk & Honey  
Mondrian Hotel  
Mother Kellys  
Mr Foggs  
Mr Fogg's Tavern  
Natural Philosopher  
Nightjar  
NOLA

Old Tom And English  
Opium  
Original Sin  
Oriole  
Oskars Bar  
Pachamama  
Pelt Trader  
Phene Arms  
Portside Parlour  
Punch Room  
Rex & Mariano  
Rok  
Satans Whiskers  
Scarfes Bar  
Seven Tales  
Sexy Fish  
Smith & Wollensky  
Smokey Tails  
Soul Shakers  
Town Hall Hotel  
Water Poet  
Well  
Whistling Shop  
White Swan  
Zigfrid

## **“London is the centre of the world”**

*Alistair Burgess, Happiness Forgets*

***“There is such high quality, within 5 minutes you can pass 3 places with Tales awards”***

Helen, 100 Islington

***“London is a historically a melting pot of different cultures which drives the bar scene”***

Damian Williams,  
68 and Boston

***“It’s the cocktail capital of the world, we try to push boundaries, then snowballs elsewhere”***

Ali Reynolds,  
(formally)  
Hawksmoor Spitalfields

***“London is a hotchpotch of cultures and such a draw, you can be whatever you want to be”***

Rosie Weil, Oriole



## 5 of the top 10 in The World's 50 Best Bars 2016 are in London

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1. **The Dead Rabbit, NYC**
  2. **American Bar, London**
  3. **Dandelyan, London**
  4. **Connaught Bar, London**
  5. **Attaboy, NYC**
  6. **The Gibson, London**
  7. **Employees Only, NYC**
  8. **Nomad Bar, NYC**
  9. **The Clumsies, Athens**
  10. **Happiness Forgets, London**

## The stars of the show – world class bartenders

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*“London bartenders all aim to become big stars; mixologists will soon be seen as **Michelin starred chefs**”*

Fabio, Gong Bar



## ○ Why London? A summary

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- **The best bars in the world, visited by the most influential and thought leading consumers in Britain, stocked with the highest quality drinks and staffed with the worlds greatest bartenders and mixologists**
- **What happens in London today, happens throughout Britain tomorrow**
  - **From experience-led events to the latest drinks trends, London remains the example for the rest of the British on trade to follow**
- **The London on trade is a breeding ground for innovation**
  - **With the bar so high, bartenders and outlets alike on constantly on the lookout for the next big thing**
- **Succeed in London and consumers will spread the word, be it in person or online**



## Providing unique training: Beyond the basics

***“Somebody coming down to talk about the history of gin and how it is made has been done a hundred times before. It’s past it’s sell-by”***

James, Opium

***“What they end up teaching in their education sessions is nothing more than you can look up on the internet”***

Alistair, Happiness Forgets

***“Teaching you how to distil vodka is something that I would have loved to have known how to do when I was 23, 24”***

Richard, Callooh Callay

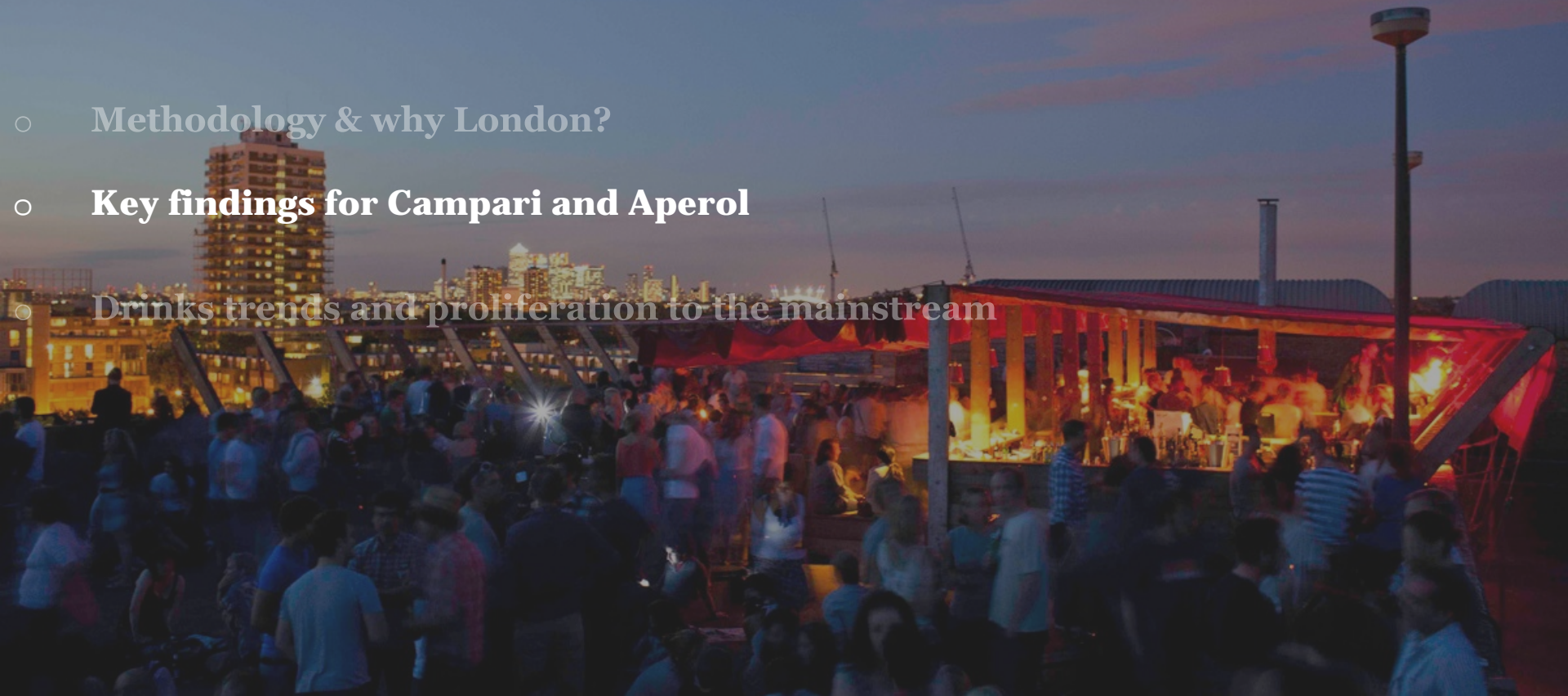
# Contents

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Methodology & why London?

**Key findings for Campari and Aperol**

Drinks trends and proliferation to the mainstream



## *Top 10 Suppliers in Branded Cocktails*

	<b>Brand</b>	<b>% of Outlets</b>	<b>% of Serves</b>	<b>Avg Serves</b>
<b>1.</b>	BBFB	<b>82%</b>	<b>18%</b>	<b>5</b>
<b>2.</b>	Diageo	<b>57%</b>	<b>15%</b>	<b>6</b>
<b>3.</b>	Campari UK	<b>79%</b>	<b>12%</b>	<b>3</b>
<b>4.</b>	Pernod Ricard	<b>54%</b>	<b>11%</b>	<b>5</b>
<b>5.</b>	Speciality Brands	<b>31%</b>	<b>5%</b>	<b>4</b>
<b>6.</b>	Moet Hennessy	<b>36%</b>	<b>5%</b>	<b>3</b>
<b>7.</b>	WGS	<b>36%</b>	<b>5%</b>	<b>3</b>
<b>8.</b>	Maxxium	<b>39%</b>	<b>4%</b>	<b>2</b>
<b>9.</b>	Cellar Trends	<b>39%</b>	<b>3%</b>	<b>2</b>
<b>10.</b>	Remy Cointreau	<b>31%</b>	<b>3%</b>	<b>2</b>



***3 most popular drinks in summer 2016 from high end customers***

***Gin &  
Tonic***

***Aperol  
Spritz***

***Negroni***

# Aperol is stocked in 2 in 3 of all Influential Liqueur & Speciality stockists

## *Brands with largest distribution in liqueurs & speciality stockists*

	Brand	Price (50ml)	Dist.	Dist. (entry)
1.	Aperol	£6.47	65%	68%
2.	Campari	£6.55	55%	71%
3.	Jägermeister	£7.32	55%	62%
4.	Amaretto Disaronno	£7.96	42%	29%
5.	Kamm & Sons	£8.23	41%	25%
6.	Green Chartreuse	£8.86	38%	43%
7.	Cointreau	£7.91	38%	30%
8.	St Germain Elderflower Liqueur	£7.78	35%	58%
9.	Chambord Raspberry	£7.99	29%	35%
10.	Pimms No.1	£6.42	28%	74%



# Campari is the most used brand in cocktails, maintaining its 2013 lead

## Top 10 Brands used in Branded Cocktails

	Brand
1.	Campari
2.	Angostura Bitters
3.	Luxado Maraschino Liqueur
4.	Aperol
5.	Tanqueray
6.	Ketel One
7.	Bombay Sapphire
8.	St Germain
9.	Barsol Quebranta Pisco
10.	Kamm & Sons





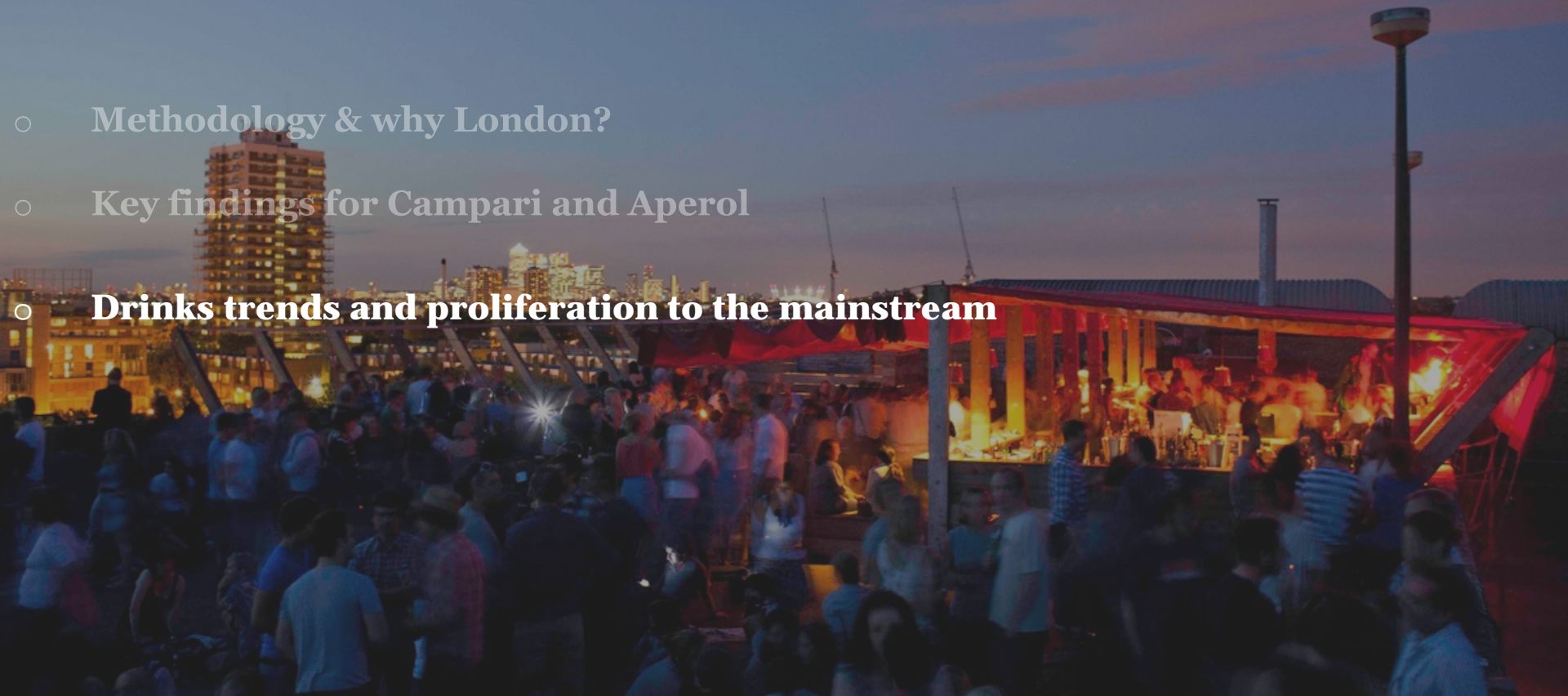
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- Methodology & why London?

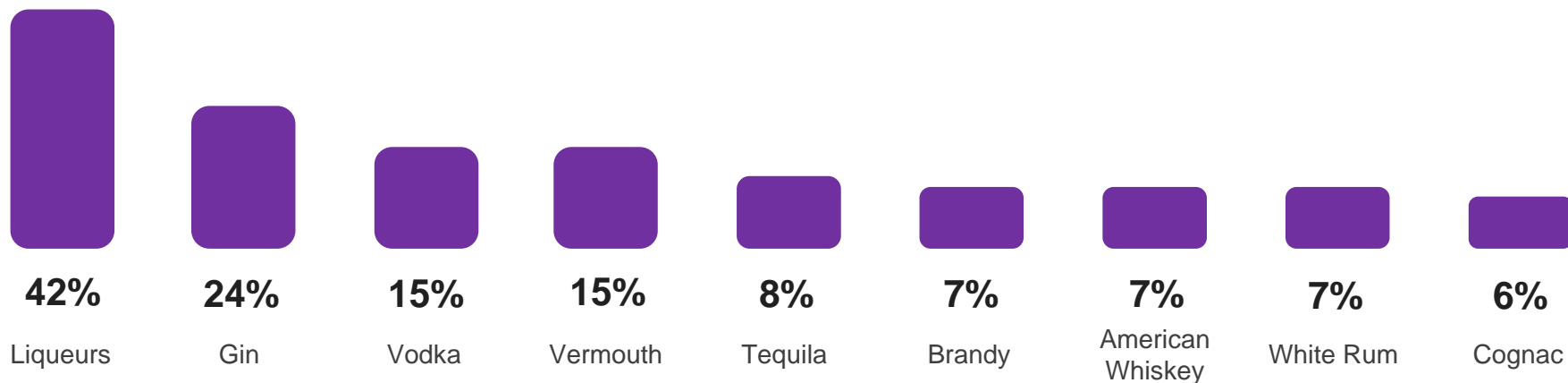
- Key findings for Campari and Aperol

- **Drinks trends and proliferation to the mainstream**



## The make up of cocktails in influential outlets: As many cocktails in high end outlets contain vermouth as vodka

*Proportion of cocktails in influential outlets containing spirits*



# The make up of cocktails in influential outlets: Most popular 10 cocktails account for under 1 in 5 listings



# 16%

*Of all cocktails listed in influential outlets are in the top 10 cocktail styles*

*Top 10 cocktail types in influential outlets – proportion of Influencers stocked in*

Fizz	46%	Spritz	29%
Sour	46%	Punch	22%
Martini	40%	Collins	19%
Negroni	31%	Daiquiri	18%
Old Fashioned	29%	Manhattan	17%



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The make up of cocktails in influential outlets:  
The range across outlets is diverse and far-reaching

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**1,502**

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*Number of cocktails across the influential outlets researched in*

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## The make up of cocktails in influential outlets: Average cocktail contains nearly 5 ingredients

4.6

*Average number of ingredients in  
cocktails listed in London influencers*

1.7

*Average number of spirits per  
cocktail in London influencers*

# Proliferation of trends in past Influencer's reports are clear – evolution is apparent

## *Trends from influential London outlets*

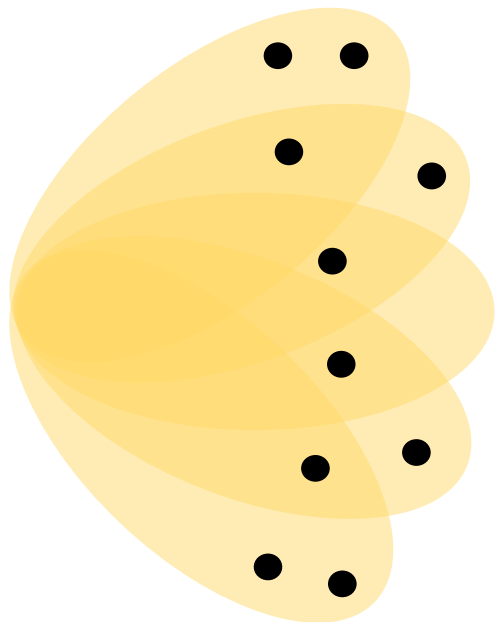
<i>2013</i>	<i>2014</i>	<i>2016</i>
<i>British &amp; locally sourced produce</i>	<i>High quality British wines</i>	<i>Health, simplicity and sustainability</i>
<i>Small batch gins</i>	<i>Small batch vodka &amp; craft distilleries</i>	<i>House bottled / distilled spirits &amp; cocktails</i>
<i>Consumer awareness of ingredient quality</i>	<i>Creativity and not following trends</i>	<i>Consumer awareness of bartender quality</i>
<i>Approachable luxury &amp; anti-premium</i>	<i>Consumer experience and pop ups</i>	<i>Exclusive sponsored events</i>
<i>Flavour innovation</i>	<i>Tequila &amp; agave</i>	<i>Mezcals and pisco</i>





# Proliferation of trends in past Influencer's reports are clear – evolution is apparent

## *Trends from influential London outlets*



### **Experience**

*Food & spirit matching*  
*Exclusivity of events*

### **Innovation & emerging categories**

*House distilled spirits/cocktails*  
*Mezcal & Pisco*

### **Provenance & story**

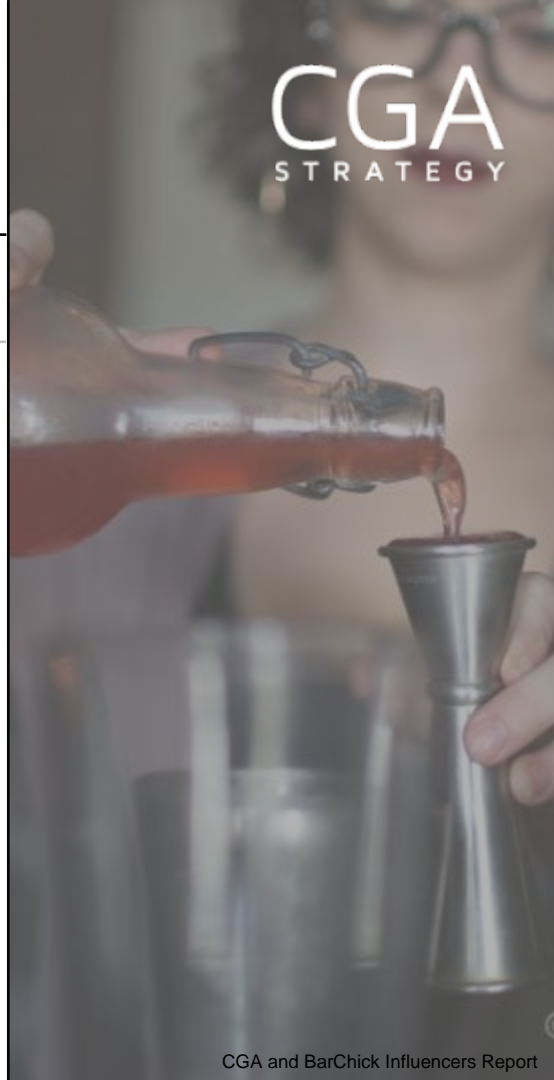
*Niche vodka*  
*Simplicity*

### **Shareable content**

*Classics done well*  
*Instagrammable drinks*

### **Self education**

*Demand for quality*  
*Bartender recognition*



# Cocktail trends likely to proliferate: Simplicity



***“A return to simplicity! Less complicated drinks done in a clever way”***

**Tim Laferla, City Social**

## Cocktail trends likely to proliferate: Vermouth, low abv and negroni



# 15%

***Proportion of cocktails in influencers outlets  
containing vermouth (equal to vodka)***



## Cocktail trends likely to proliferate: Pre-mixed cocktails showcasing bar staff skills



***“They free up bar tenders to be more interactive, produce drinks quickly, a more consistent service, gives you time to focus on your guest”***

**Niall Downey, Victory Mansion**

# Cocktail trends likely to proliferate: Classics done well



***“It’s going to be about classics - Classic as inspiration to do all the modern things and take them to a new level”***

**James, Opium**

## Spirit trends likely to proliferate: Food & spirit matching



***“We’ve held some ticketed masterclasses such as “how to blend whisky” and paired the whisky with food which proved very successful”***

**James, Opium**



## Spirit trends likely to proliferate: Mezcal & Pisco



**57%** of influencers outlets stock Mezcal, rising to **60%** for innovators  
and **80%** for anti-premium/neighbourhood

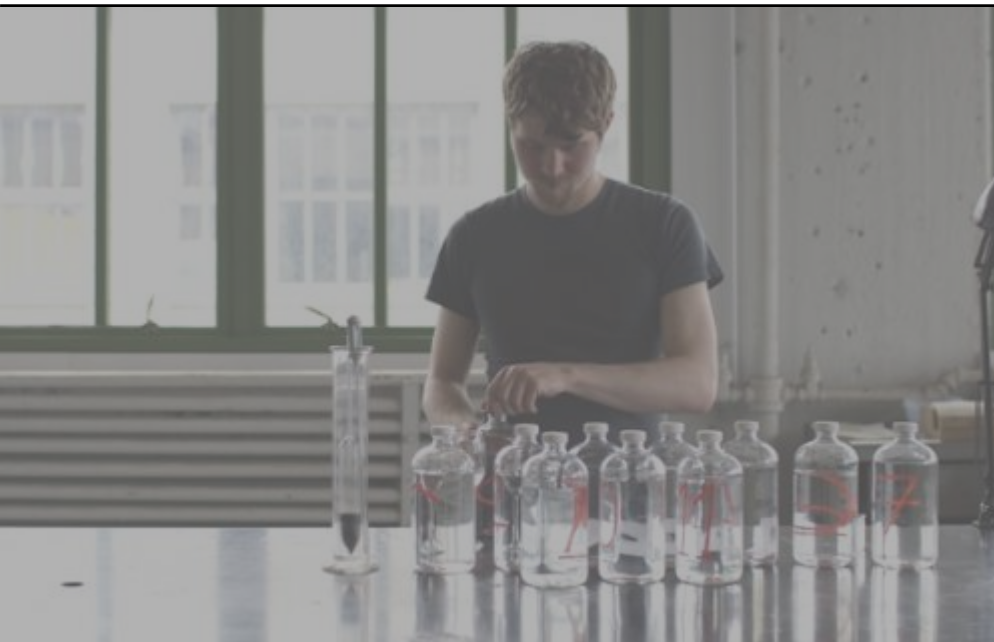
## Spirit trends likely to proliferate: Tequila acts as a mainstream spirit



***Tequila is stocked in 89% of influencers outlets (nearly as many as vodka, 91%) and has on, average 5 different price points per outlet***

# Spirit trends likely to proliferate: Niche vodka

CGA  
STRATEGY



***“We’ve seen a diversification of people’s tastes, where people are more interested in finding niche things”***

Damian Williams, 68 and Boston

***“Vodka is coming back in”***  
JJ Goodman, London Cocktail Club



## Experience trends likely to proliferate: Exclusive sponsored events



***“We get traction on national holidays holding launches with a sponsor around a particular alcohol e.g Scotch on burns night”***

**Alistair Reynolds - Spitalfields Bar**

# Experience trends likely to proliferate: Bartender recognition



***“What most affects our trade? Bartenders doing well outside of work”***  
Ali Reynolds, (Formally) Hawksmoor Spitalfields

# Here to stay: Gin

CGA  
STRATEGY



*Gin is stocked in **98%** of influencers outlets  
with **64%** of which stocking over 10 different brands*

CGA and BarChick Field Research data



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## Cocktail trends likely to proliferate: Simplicity

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*“Trends for the next 12 months? A return to simplicity! Less complicated drinks done in a clever way”*

**Tim Laferla, City Social**

*“I appreciate a good garnish, but so long as it’s a fresh lemon and a nice looking lemon peel, that’s enough”*

*“People just appreciate simplicity these days, at least in the East End”*

**Oskar Klimaszewski, Found**