



# BACARDI COCKTAIL TRENDS REPORT 2023

Presented by Bacardi Limited  
in association with The Future Laboratory



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# Introduction

Throughout 2022, uncertainty has continued to abound. But after experiencing enforced hybrid living at the beginning of the decade, people are now viewing the challenges they face – from the climate crisis to geopolitical tensions – with fresh eyes.

Consumers now have more control over their lives, and are experts when it comes to their needs and desires. They understand their rhythms, what makes them tick, and the kind of world they want to live in. All of which contributes to a sense that the **future is very much up for grabs**. It's a feeling echoed in the wider landscape.

**“Believe it or not, we’re on the cusp of a new cycle of mass flourishing and innovation. The widespread upheaval of the last few years has rewritten the rules of collaboration and community, with 2023 representing the beginning of mass technological, societal, cultural, and organizational transformation.”**

*Martin Raymond*  
Go-founder of The Future Laboratory

For the drinks business and cocktail consumption, the stage is being set for a year of ramped-up innovation and action. The organizations that embrace this mindset will be able to meet the myriad expectations of consumers, who are applying newfound flexibility and fluidity to the flavors, experiences, cocktails, and occasions they embrace.

**“As 2023 arrives, we see people adapt to the shifts around them, and the onus is on brands to find innovative ways to captivate and delight their audiences. As cocktail culture flourishes, people are seeking inspiration from the new flavors, sensations, and experiences they’re seeing in bars and restaurants and using these to deepen their enjoyment in the creation of cocktails.”**

*Brenda Fiala*  
Global VP, Strategy, Insights & Analytics at Bacardi

While people’s tastes around what, when, and how they want to drink may be in flux, attitudes toward values, community and mindfulness are anything but, ensuring that brands must work harder than ever to demonstrate that they are on the same journey toward building a better future.

In this report, Bacardi Limited, the world’s largest privately held spirits company, looks ahead at the key trends impacting cocktail consumption and the spirits business in 2023. This report, made in collaboration with The Future Laboratory, draws on insights from Bacardi-led consumer and brand ambassador surveys, interviews with the bar and restaurant trade, and The Future Laboratory’s independent research.



MACRO TREND 1:

# PLEASURE *Revolution*

People are turning away from a life of relentless productivity, instead shifting their focus from enhancement to enjoyment, and seeking cocktail experiences free from convention.





# Cocktails FOR ALL

Flexible and fluid living is fueling the emergence of liberated attitudes among cocktail drinkers, with people **prioritizing new ingredients** and exciting flavor combinations at home, during celebratory moments, and everywhere in between.

Research from the Bacardi Consumer Survey 2022 shows this in action. In the United States, more than **one-third (38%)** of respondents plan to drink more cocktails than wine over the next year, while nearly half (44%) of consumers in South Africa are looking at drinking more cocktails than beer.

This shift can be traced back to the boom in **at-home mixology** sparked by lockdowns during the pandemic. It continues to grow and to influence where and when cocktails are created and consumed. The Bacardi Consumer Survey 2022 reveals that 40% of respondents in the U.S., and more than 30% of those in the United Kingdom, are choosing to make more cocktails at home in 2022 compared to 2020. This is upheld by almost 30% of respondents across the U.S., U.K., Mexico, India, and South Africa, who say they have upped their cocktail knowledge over the past two years. Furthermore, Google Search volume for “cocktails” went up by 59% between October 2021 and September 2022.

It’s not just any cocktail taking centerstage when people’s repertoires at home and on-premise. A desire for fun and frivolous flavors is evidenced in the Bacardi Consumer Survey 2022, where daiquiri (37%), margarita (37%), and bloody mary (34%) are ranked among the cocktails which are most frequently ordered by consumers when they are drinking out or when making cocktails at home. This focus on enjoyment means that mixologists are free to **innovate and elevate cocktail experiences to excite the senses**.

Notably, Bacardi is nurturing more innovative approaches to cocktail-making at home with the Freepour app. The Bacardi-created app enables bartenders to advance their career digitally and provides training and education to help them upscale their craft. In addition, products such as TAILS® COCKTAILS ready-to-serve (RTS) cocktails give people the freedom to enjoy complex offerings conveniently with just a simple pour of a bottle. In 2022, the brand made its range of premium batched cocktails available for consumers to enjoy at home and in bars. These are opening up the opportunity to cater to people’s burgeoning appetite for quality cocktails without worrying about the skills that go into making them.



# TOP 20 GLOBALLY SOUGHT-AFTER *Cocktails*

1. MOJITO
2. DAIQUIRI
3. VODKA SODA
4. BLOODY MARY
5. GIN AND TONIC
6. PIÑA COLADA
7. MARGARITA
8. WHISKY HIGHBALL
9. RUM AND COKE
10. COSMOPOLITAN
11. ESPRESSO MARTINI
12. TEQUILA SUNRISE
13. BLUE HAWAIIAN
14. LONG ISLAND ICED TEA
15. WHISKY SOUR
16. DARK & STORMY
17. IRISH COFFEE
18. MARTINI
19. MICHELADA
20. CAIPIRINHA







# MORE AND MORE *moments*

In 2023, expect to see the rise of **all-new drinking occasions**, with the growing popularity of non-traditional venues – the New Premise – providing more opportunities for people to treat themselves and enjoy cocktail experiences.

Consumers are already widening the scope for when, where, and why they seek drinking experiences as cocktails find shelf space beyond traditional venues. According to the Bacardi Consumer Survey 2022, one quarter (25%) of U.S. consumers say cafes are their preferred cocktail consumption venue, while in South Africa, nearly half (43%) of consumers say they are less likely to go to nightclubs for cocktails.

Globally 44% of respondents say relaxing with friends or family is the number one cocktail-drinking occasion - outpacing happy hours, date nights, and parties.

As these new moments take shape, drink formats are transforming to cater to the myriad occasions when, and locations where, people are seeking cocktail experiences. Increasingly, we're seeing cocktails pop up in venues like golf clubs, cafes, concerts, and even country clubs, enabled by the emergence and ingenuity of canned and pre-batched cocktail options.

**“People are looking to make up for missed moments, choosing to indulge in these moments that matter with high-quality spirits and ingredients. More so, they’re celebrating these occasions in places beyond traditional venues as they now have the opportunity to partake in cocktail experiences even in places like the park, cafe, and pickleball court.”**

*Jacob Briars* Global Trade Advocacy Director at Bacardi



Individuals are also looking to ready-to-drink (RTD) offerings for more flexible, fluid, and spontaneous celebrations. Consumer desire for such options shows no sign of abating, with Insight Ace Analytic revealing that the RTD market, currently valued at \$36.42bn, is expected to grow 11.2% by 2030. Premixed cocktails and spirit-based seltzers, meanwhile, accounted for \$1.6bn in off-premise sales from November 2020-2021, with 55% of U.S. respondents preferring spirit-based beverages to other RTD choices, according to the Distilled Spirits Council of the United States.

Spirit-based canned cocktails have continued to gain popularity as a “no hassle” premium experience at home and in a variety of venues, including music festivals, nightclubs, concert venues, coffee shops, and golf resorts. According to the Bacardi Global Brand Ambassador Survey 2022, **72% of respondents are seeing speed of service as the reason for increased spirit-based RTD activity in bars and restaurants**, and 62% see pre-batched cocktails as a category that is set to increase in the future.





WHERE ARE WE DRINKING

# cocktails?



**65%**  
RESTAURANT



**64%**  
HOME



**50%**  
BAR IN MY CITY



**46%**  
NIGHT CLUB



**43%**  
BAR IN A CITY  
I'M VISITING



**41%**  
FESTIVAL/  
CONCERT



**39%**  
BAR IN MY  
NEIGHBORHOOD



**25%**  
OUTDOOR PARK



**25%**  
SPORTS VENUE



**25%**  
CAFE



**24%**  
PRIVATE  
MEMBERS' CLUB



**1%**  
OTHER

## MACRO TREND 2:

# *Transformational* TASTES

With greater control over their schedules, consumers are looking beyond traditional cocktail culture. Harnessing the move toward experimentation and flexibility, 2023 will transform when and where people celebrate with cocktails, and the flavors they choose to enjoy.





# CIRCADIAN cocktails

With time becoming more unstructured in a world of hybrid work, drink occasions are becoming increasingly varied. Many are enjoying cocktails earlier in the day, and this brings opportunities for creations that align with an individual's rhythm and match their mood at a specific time as they amend their social routine.

The Bacardi Consumer Survey 2022 reveals that compared to 2020, nearly 40% of respondents in the U.S. and U.K., and more than 50% of respondents in countries including South Africa, India, and Mexico, are going out to eat, drink or socialize earlier in the evening. For respondents in the U.S. and South Africa, those enjoying spirits or liquors between 4 pm and 8 pm (40% and 43%, respectively) closely match those enjoying the more traditional evening slot.

This shift is leading to a **surge in spicy drinks, with tequila or vodka-based cocktails** finding affinity with bolder, unexpected pairings including, jalapeños, and tabasco. Research from Mintel reveals that in the U.S. three quarters (75%) of people now enjoy spicy flavors, and a Sainsbury's study shows that more than one-third (36%) of people in the U.K. have introduced chili into their diets in the last two years.

The focus on these ingredients is leading to interesting takes on classics, such as the spicy margarita which, saw 48% growth in average monthly Google searches across markets between September 2021 and September 2022. In India, research from Bacardi reveals that nearly half of consumers (43%) are set to order a bloody mary in the next 12 months, highlighting the emergence of spicier mixes and those which are more suitable in pre-noon or early afternoon contexts.

Bitter flavors continue to remain popular, with more than 30% of bartenders looking to ingredients such as coffee and aromatic bitters, and to ferments including kombucha and kefir, according to the Bacardi Global Brand Ambassador Survey 2022. This research shows that 40% of bartenders are interested in coffee-flavored drinks and 58% in espresso martinis. This cocktail is the fifth most popular among respondents in the U.K., while Yelp reports that mentions of espresso martini were up nearly 300% in the first six months of 2021 vs. the same period three years earlier.

*Most popular flavors*



**FRUITY**



**SWEET**



**SAVORY**



**SPICY**



**SOUR**



**BITTER**



**SALTY**



**HERBACEOUS**



# NOSTALGIA WITH A

# twist

With people around the world facing ongoing tensions and uncertainties, experiences that stimulate nostalgia are in demand. **In 2023, consumers will seek out cocktails that transport them back to better times**, with a recent Mintel study revealing that consumers aged 25-44 are most likely to enjoy things that remind them of the past.

This drive is prompting an uptick in nostalgic, classic cocktail choices that are elevated with a twist, whether through the addition of low-proof bitters or an unexpected ingredient. At San Francisco's immersive tiki bar Last Rites, the cocktail menu brings a level of sophistication to the genre's typical kitsch, imbuing classics such as mai tai with house-made cashew orgeat syrup instead of the traditional almond-based version.

Research from the Bacardi Consumer Survey 2022 confirms this shift further, highlighting that 58% of bartenders are most interested in classic cocktails with a twist. More than a quarter, meanwhile, are interested in cocktails such as martini, margarita, negroni, highball, and old fashioned.

In Mexico, consumers aren't just making retro cocktails but are ordering them liberally too. The Bacardi Consumer Survey 2022 shows that 57% of Mexico-based respondents opt for mojitos, and half choose piña coladas, whether at home or in a bar.



The popularity of rum-based cocktails is driving growth and premiumization across this spirit segment, with Bacardi's Global Brand Ambassador Survey 2022 revealing that **32% of bartenders expect to see increased premiumization in aged rums over the next year**. Figures from NielsenIQ show that in the 12 months to July 2022, total rum sales amounted to \$1.2bn in the U.K., with rum accounting for 13% of the overall spirits category and the country highlighted as the fastest-growing key market.

As nostalgia continues to pervade the market, 2023 will provide an opportunity for brands to evolve and reroute nostalgic drinks through sustainable, mindful and flexible twists that place them firmly in the present.





# CAREFREE *creations*

This new landscape is providing places where bartenders can push the boundaries with experimentation, liberation, and **fun ingredients**.

Research from the Bacardi Consumer Survey 2022 reveals that in the U.S. and U.K., respondents were most likely to enjoy cocktails containing fruity (35% and 38%, respectively) and sweet (27% and 29%) flavors, signaling the emergence of more frivolous and carefree drink options.

“For many people, pandemic lockdowns amplified aspects of creating coziness,” says Brandy Rand, chief strategy officer, IWSR Drinks Market Analysis. “Flavors and smells like chocolate chip cookies, fresh-squeezed lemonade, or a peanut butter and jelly sandwich bring back the nostalgia of childhood and are simple comforts.”

Bartenders in various establishments have been experimenting with more fun, sugary drinks – think 90s and 2000s “cringe” cocktails like cosmopolitans and passion fruit

martinis. The advent of aesthetic and colorful concoctions chimes with findings from the Bacardi Global Brand Ambassador Survey 2022, where 81% of respondents note the rise of ‘Instagrammable’ cocktails being created and listed on menus in 2022.

This shift is also being seen in other industries. Confectionery brand Rotten, for example, aims to hit a nostalgic note with horror visuals reminiscent of the “Goosebumps” books that many millennials will remember reading as children.

Notably, experimentation is being experienced in bars and restaurants, too. Philadelphia’s Hop Sing Laundromat, the idiosyncratic Chinatown cocktail bar, is hosting a weekly residency by bartender and author of “The Bartender’s Manifesto” Toby Maloney. The residency is akin to that of a musician or artist, with experimentation the key aim. Such events elevate cocktail experiences into a form of entertainment, chiming with the industry’s move toward fun and frivolity.





MACRO TREND 3:

# Virtual EXPERIMENTATION

The digital realm is proving rife for drinks innovation, with accelerating technologies providing fresh paths to cocktail discovery, creation, and enjoyment.



# DIGITAL *Democratization*

Consumers have heightened expectations and are requesting cocktails at traditionally unexpected times and venues. They want their cocktails to be customized to their preferences, with 2023 set to be the year of on-demand drinks and experiences, all facilitated by the convenience of digital commerce and the ingenuity of web platforms.

The proliferation of inter-pandemic delivery services set this shift in motion, with premium cocktails chief among the change. Research from the Bacardi Consumer Survey 2022 reveals that more than one third (35%) of respondents in the U.S. now order cocktails-to-go from a bar or restaurant, while a similar percentage (33%) use a third-party delivery service.

Driving this concept of digital personalization outside of the home and further into the future is Cecilia.ai, the developer of the world's first interactive bartender, which signed a first-of-its-kind partnership with the Bacardi Center of

Excellence at the Chaplin School of Hospitality & Tourism Management at Florida International University. Cecilia.ai features an interactive 3D avatar of a bartender, named Cecilia who is able to engage in a two-way conversation, describe the menu, recommend drinks and, of course, make cocktails.

**Working with advanced voice recognition and AI technologies** to make 120 cocktails per hour, the innovation is charting a new frontier in mixology, with opportunities for customization abounding. It's a reflection of shifts in the wider innovation landscape too, with figures from the World Intellectual Property Organization showing that Q1 2022 saw the highest growth in patent filings (21%) on record, with AI and data-learning innovations the Holy Grail.







# Betterverse IMBIBING

If 2022 was the year of the metaverse, expect **2023 to be the year of the Betterverse**, where the immersive, collaborative, and engaging virtual realm is harnessed to provide transformational experiences, education, and exploration.

As Martin Raymond, co-founder of The Future Laboratory, states: “To continue to attract consumers and their ever-changing mindsets through the next decade and beyond, businesses must help to build the Betterverse – a metaverse that stands for equitability, inclusion, representation, accessibility, transformation, and personal and planetary betterment.”

With technology research firm Gartner predicting that by 2026 a quarter (25%) of people will spend at least one hour a day in the metaverse to work, shop, socialize or consume entertainment, expect bartenders to lean into Betterverse philosophies by using virtual realms as positive places to provide access to and education around

cocktails. With their intrinsic openness, digital spaces have the potential to create new paths to drinks education and experimentation, with forward-thinking brands using gamification strategies to make such concepts even more engaging.

Bacardi is already unlocking this future through the creation, in June 2022, of the world’s first metaverse distillery in Decentraland. The ANGEL’S ENVY® meta distillery was devised to give brand loyalists and new audiences the opportunity to embark on a gamified and educational virtual production tour, complete with a cocktail quest, access to free NFT wearables and a Proof of Attendance token, and the ability to plant virtual white oak trees. Bacardi has also increased awareness of its popular PATRÓN® tequila cocktails and highlighted the GREY GOOSE® honey deuce cocktail through immersive metaverse experiences.

MACRO TREND 4:

*Sophisticated*  
**SIPS**

Revitalized attitudes to spirits are encouraging premiumization across categories, as consumers lean into the sophistication and experimentation afforded by high-quality mixology.





# PREMIUM

# Minimalism

Discerning mindsets will drive drinks premiumization across the board in 2023. According to research from the Bacardi Global Brand Ambassador Survey 2022, **72% of bartenders are noticing the most premiumization within tequila.** Other categories that are seeing a larger play for premium spirits are single malts, aged rum, and mezcal. Research from the Bacardi Consumer Survey 2022 reveals that nearly half of consumers in Mexico (46%), South Africa (46%), India (45%), and the U.S. (45%) say it's extremely important for them to drink cocktails that contain high-quality spirits and liquors, showcasing this shift in action. In addition, more than a quarter (28%) of respondents in the U.K. are drinking more premium spirits and liquors.

The consistent market performance of premium spirits is reinforcing alcohol's resilience and status, mimicking the uptick of other "affordable luxury" categories such as coffee and beauty during economic downturns. As The Future Laboratory's Chris Sanderson notes: "At times of crisis, high-quality creations represent an achievable means of treating oneself and a form of escapism."

As consumers seek the sophistication of **high-quality spirits**, bartenders are moving away from complex, fussy cocktails with lots of decoration or garnish. Instead, they're letting the quality of the cocktail – including its ingredients, flavors and aromas – speak for itself. Research from the Bacardi Global Ambassador Survey 2022 confirms this development, with nearly half (49%) of bartenders expecting to see simpler serves, crafted with premium ingredients, on menus over the next year.



This minimalism is also being seen beyond the cocktail category, with experimentation in the food scene signaling a wider shift toward quality ingredients celebrated through simplicity. At Brutalisten restaurant in Stockholm, for example, diners are served dishes that adhere to the principles of one-ingredient cooking, with ingredients, not recipes, taking center stage. Dishes are prepared with just one ingredient at a time, with the most minimalist of dishes including no water, salt or oil. “The aim is to dig vertically into the taste of a given ingredient and clear it of the background noise,” explains artist and Brutalisten founder Carsten Höller.

As consumers lean into the quality and craft associated with minimalist food and drink concoctions, **2023 will see future-facing brands create flavor-focused experiences as add-ons.** DEWAR’S® blended Scotch whisky, for example, boosted the visibility of its premium offering through a specialist emporium at Istanbul Airport, with vapor infusion jars providing shoppers with a multisensory experience that drew attention to the distinct profiles of whisky.







# Savory COCKTAILS

Following the growth in cocktail connoisseurship among consumers, people are now looking to diversify their tastes and deepen their palates further by indulging in and experimenting with savory, salty, and herbaceous flavors more commonly found on the dinner plate.

Research from Global Data reveals that **consumers are driving forward this savory future, with nearly one third (30%) of people saying they would buy a drink purely because they were curious about its flavors.**

For drinks brands, this curiosity means it's often a case of the bolder the better. Respondents to the Bacardi Global Brand Ambassador Survey 2022 confirmed this shift, noting the rise in adventurous spices and seasonings such as tamarind, tajin, chipotle, and cardamon. Chicago's Osito's Tap is already leaning into this appetite for experimentation. Its range of agave-focused cocktails come spiked with peppercorn, pimento, and chile ancho reduction.

Bartenders across territories are also crafting innovative food-pairing options – particularly with tequila cocktails – and taking on board sustainability by ensuring anything left over from the cocktail's garnish is used to accompany small dishes.

In response, expect to see cross-brand collaboration between food labels, restaurants, and drink producers in 2023, with familiar savory tastes or famed dishes captured in unexpected spirits and seltzers. With its neutral palette and soft notes, tequila has been spotlighted for savory and spicy collaborations, with brands such as PATRÓN presenting modern drinks in their digital cocktail lab using chipotle, tomato water, and green chili salt.

MACRO TREND 5:

# Conscious COCKTAILS

Purpose has never been more important. As the mindful drinking movement matures, individuals are seeking the same consciousness from the organizations they interact with, encouraging drinks brands to further enshrine sustainability and community building across the industry.





# GREEN Creations

Environmental awareness is transforming how the drinks industry operates. High-end venue bartenders are increasingly conscious of **reducing waste**, looking for **sustainable ingredients** and thinking about what happens to the items used, from bottles to garnishes.

The focus on **zero-waste** is peaking, with 44% of bartenders interested in the issue, according to Bacardi's Global Ambassador Survey 2022.

**“Drinks brands are set on communicating the sustainability and ingenuity of their supply chains and manufacturing processes to customers, and promoting their environmental credentials as a central part of their offerings.”**

*Chris Sanderson*

Co-founder of The Future Laboratory

These changes are being welcomed by climate-conscious cocktail drinkers, who are not only opting for sustainably made choices but are willing to pay more for them. The Bacardi Consumer Survey 2022 reveals that in India, almost nine in 10 (89%) respondents say they would be willing to spend more for spirit or liquor brands which stand for sustainability, while 58% of respondents across countries surveyed were willing to pay at least 10% more for these choices.

The survey also shows how practical sustainable and environmental practices are important to consumers. More than half (52%) of all respondents listed recyclable packaging as key to their liquor and spirit considerations followed by reducing single-use plastic (45%) and buying local (42%). Respondents in emerging markets including India, Mexico, and South Africa show an even higher degree of environmental consciousness with a larger percentage of respondents seeing sustainability as an important factor in their consumption preferences compared with developed countries such as the U.S. and U.K.





Bacardi continues to make progress in its **ambition to become the most environmentally responsible global spirits company, with a goal to become plastic-free by 2030**. In 2022 the company's eponymous rum brand BACARDÍ® announced plans to cut its greenhouse gas emissions in half from 2023, with a new combined heat and power (CHP) system, which provides a much cleaner and more efficient energy solution, set to go live at the brand's distillery in Puerto Rico, which is the world's largest premium rum distillery.

Bacardi has also made strides with its other brands. Following decades spent pioneering sustainable practices, MARTINI® has reached a sustainability milestone, with 100% of the wineries for its entire portfolio now certified sustainable. Every drop of grape juice used in the production of MARTINI vermouth and sparkling wines is now sourced from wineries certified according to the standard set by Equalitas, the most comprehensive sustainability standard in Italian winemaking. BOMBAY SAPPHIRE® has seen similar achievements with all 10 botanicals in BOMBAY SAPPHIRE gin being certified sustainable by Ecocert S.A. in 2022.

On premise, zero-waste cocktails are gaining traction among consumers and mixologists too, with many using alternatives such as vinegars, distillates, shrubs, and cordials to sour the drinks. Others are reusing typically wasteful cocktail ingredients, producing cordials from leftover citrus rinds, infusing rum with avocado pits and utilizing pineapple husks to make simple syrups.

**“Consumers want to feel good about the choices they’re making. They’re looking for brands that are making a positive impact and choosing beverages made from high quality and sustainable ingredients.”**

*Jadric Lippman*  
V.P of ESG at Bacardi





# Environmental and Sustainability

## THEMES THAT ARE MOST IMPORTANT TO CONSUMERS

53% RECYCLABLE PACKAGING

45% REDUCING SINGLE USE PLASTIC AND PACKAGING

42% BUYING LOCAL

41% HELPING PRESERVE CLEAN WATER

38% REDUCING CARBON FOOTPRINT

38% SUSTAINABLY SOURCED INGREDIENTS

34% USING PAPER OR METAL STRAWS

32% BUYING ETHICALLY SOURCED PRODUCTS

25% COMPANIES BECOMING NET POSITIVE







# NoLo

## INTERCHANGEABILITY

With consumers choosing to drink alcoholic and non-alcoholic cocktails at the same occasion, without any social stigma, **the stage is set for a period of non-alcoholic and low-proof (NoLo) experimentation.** The growing adoption of NoLo cocktails is piquing bartenders' interest, with the Bacardi Global Brand Ambassador Survey 2022 showing that **49% of are curious about cocktails with non-alcoholic spirits.**

Across key markets, the majority of NoLo drinkers can now be more accurately categorized as "Substituters" – those who enjoy NoLo drinks in place of full-strength drinks on certain occasions, rather than those who eschew alcohol altogether. IWSR

research confirms that in the U.K., 40% of NoLo consumers are Substituters, with legal drinking age (LDA) Generation Z and millennials (46% and 41%, respectively) more likely to substitute than Boomers (36%).

LDA Gen Z and millennials in the U.K. are also more likely to be "Blenders", switching between NoLo and full-strength on the same occasion (20% and 23%, respectively). These new consumer categorizations are already resulting in category growth, with NoLo alcohol forecast to outpace full-proof category growth tenfold, according to IWSR.





**“Where spirits brands once considered NoLo consumers a distinct category, they are increasingly overlapping with drinkers as they substitute full-proof spirits with NoLo alternatives in their drinks.”**

*Marine Rozenfeld*

Innovation Development Lead for Western Europe, Australia, and New Zealand at Bacardi



This is leading NoLo innovations to call time on overly sweet or tasteless mocktails. Non-alcoholic choices are being **creatively crafted with flavor**, in the same vein as full-proof spirits.

MARTINI Vibrante for example, is a non-alcoholic aperitivo that is made with the same quality of wines, herbs and botanicals selected by the brand's master herbalists for its other alcohol offerings. Harnessing the skills of MARTINI master blender Beppe Musso, it's crafted using pioneering technology that gently removes the alcohol from the drink to preserve its authentic characteristics and flavors.







# Community HUBS

Bars and restaurants continue to emerge as key community hubs, while hotel bars, in particular, are grabbing attention – and spend – by becoming sought-after destinations in their own right, providing a place for locals to find escapism during tumultuous times.

The hotel bar has long been ripe for reinvention, with venues now able to benefit from a wider appreciation of beverages in the media. Lorenzo Antinori, beverage manager at Hong Kong's Four Seasons Hotel, notes: "The role of mixologists nowadays is closer to chefs, and the attention that the media gives to the bar world has increased consumers' curiosity and attentiveness towards the newest trends."

The Fife Arms in Scotland is just one example of how new modern drinking hubs are emerging through innovation, and this is particularly pertinent when consumers are increasingly moving clubs and parties down the roster of their ideal drinking

locations. The five-star historical venue encourages visitors to meander through Bertie's Bar – a labyrinth of 365 whiskies – and to turn to taste cards to learn more about each dram.

**Cocktails are no longer just an add-on to the hotel stay or a dining experience.** Hoteliers have the opportunity to develop a distinct identity for their drinking establishment by encouraging cocktail exploration and experimentation.

Hoteliers could even embrace the shifting categorization of hotel bars as community hubs in 2023, hosting events as ways to open the door to a more diverse and younger LDA+ clientele. The New York Times recently reported that Generation Z drinkers are swapping Bushwick dive bars for old-school hotel establishments such as Bemelmans Bar and the Rainbow Room, the latter of which has hosted post-punk listening parties.



# Conclusion

As the curtain closes on 2022, **a new approach to innovation is bubbling up for 2023.** “There is something peculiar about the world at this particular moment,” says The Future Laboratory’s Martin Raymond. “It’s agitated and excitable, with several things happening simultaneously.”

Geopolitical uncertainty, a widening economic gulf, and an unceasing climate crisis may have prevented the respite that 2022 promised, but in doing so they have focused minds toward making 2023 the start of transformational change. Future-facing brands are seeking to create a counter-push to doomsayers, short-termism, indifference, and helplessness, instead re-establishing common ground and embarking on journeys of radical progression.

For cocktail consumption and the spirits business, this means **providing exceptional creations and embracing flavors that immerse people in the moment** and open minds to new routes forward. It means harnessing innovation and emerging technologies to develop new products, services, and experiences that invoke awe. And it means doubling down on planetary betterment.

In doing so, the sector can ensure that lessons learned at the start of the decade are successfully harnessed to deliver a new Roaring '20s of celebration, innovation, and extraordinary experiences.





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Specific statistics and examples are referenced and web linked throughout the document.

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