



# WINEMETRICS

## 2014 Drinks Report

Includes Winemetrics 2014 Cocktail Report

2014 On-Premise Wine BTG, Beer and  
Cocktail Distribution in the Top 100 Chains



WINEMETRICS

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## Introduction

Welcome to our premier edition of **Winemetrics'** *2014 Drinks Report*. This is our first report focusing on all segments of on-premise adult beverage distribution, wine, beer and cocktails. It is designed to provide our clients with a first look at wine, beer and spirits distribution for 2014 and includes our annual Cocktail List Report, which is now incorporated into this report.

Winemetrics currently publishes 4 annual reports (projected release dates): Winemetrics' On-Premise Wine Distribution Report, Cocktail List Report, Supplier On-Premise Report and Luxury Wine On-Premise Report. This year we are going to condense these reports to 2, our 2014 Drinks Report will be launched August 1, 2014 and will include beer distribution (for the first time), cocktail distribution and wine by-the-glass distribution for the top 100 chains. The second report will combine Winemetrics On-Premise Wine Distribution Report and our Supplier Report into one document. The data used in both reports is compiled in the second and third quarter of the year it is published in order for it to be utilized in strategic planning for the second half of 2014. We intend to keep pricing constant which will result in considerable savings to our clients who purchase our reports.

Should you wish to acquire more detailed information about specific suppliers or wine varieties not listed in this report, please contact us at [info@winemetrics.com](mailto:info@winemetrics.com).

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## About Winemetrics

**Winemetrics** is the leading source of on-premise wine information and analysis, and provides the most complete, objective wine market intelligence available. The founder of Winemetrics, Charles Gill, has over 30 years of experience at all levels of the alcoholic beverage industry and has been providing the wine industry with on-premise wine distribution analysis for the past decade.

In addition to our annual reports For more details on this report and to download an excerpt, please visit our site at [www.winemetrics.com](http://www.winemetrics.com) where you may sign up to receive our enewsletter, *What's on America's Wine Lists*.

For suppliers and restaurateurs, Winemetrics creates custom Wine List Analysis Reports (WLAR), which compare a chain's list to key national and regional competitors by restaurant cuisine and type (Casual, Upscale Casual, Fine Dining). These reports feature analysis by country and appellation, variety, price and brand, allowing clients to determine if their lists provide the diversity and value needed to attract and retain high-value, core wine consumers. For more information, or to view a sample restaurant wine list analysis report, please visit our site at [www.winemetrics.com](http://www.winemetrics.com) and click on "Restaurants." or email us at [info@winemetrics.com](mailto:info@winemetrics.com) with your inquiries.

## **About Winemetrics 2014 Drinks Report**

Our data was compiled during the second quarter of 2014 and reflects distribution of the top 100 chains with significant wine, beer and cocktail lists in our database. This laborious task of matching thousands of brands to hundreds of suppliers was then applied to the data compiled from the sample we used for our *2014 Drinks Report*. Based on our experience on the timing and changes in wine list data, we believe this report portrays an accurate current picture of leading wine, beer and spirits brands and suppliers on-premise.

Winemetrics surveys a representative group of accounts from 300 national and regional chains and restaurant groups. The top 100 of these chains, based on total units and the presence of significant wine, beer and cocktail lists, were included in this report. This account sample represents over 14,000 restaurants nationwide and provides a very real picture of the adult beverages being ordered and consumed on-premise in national and regional chains and restaurant groups.

*Winemetrics 2014 Drinks Report* provides an overview of the leading wine, beer and spirits brands and suppliers found in the nation's leading chains and restaurant groups. We also identify the most popular wine, beer and cocktail types and the top brands in each segment. Finally, our *2014 Drinks Report* provides analysis of the adult beverage programs in top 50 chains in our survey. To our knowledge, no other publication offers such a broad and deep analysis of on-premise beverage selections in such a timely manner.

Please note that our sample is based on a representative survey of each chain that was conducted in Q2, 2014. Franchisees of larger chains with lists that may deviate from the corporate core selections may not be represented in this report.

## List of Major Restaurant Chains/Groups Used in Our Sample

99 Restaurant	Firebirds	Old Chicago
Anthony's CF Pizza	Flemings	Old Spaghetti Factory
Applebee's	Fox & Hounds	Olive Garden
Bahama Breeze	Giordano's	On the Border
Bar Louie	Gordon Biersch	Outback
Beef O'Brady's	Grand Lux	Palm, The
Benihana	Granite City	Pappadeaux
Bertucci's	Grimaldi's	Pappasitos
Biaggis	Hard Rock Café	PF Changs
BJs	Hennessey's	Quaker Steak & Lube
Black Angus	Houlihan's	RA Sushi
Bonefish Grill	Il Fornaio	Ram Brewery
Bravo	Islands Burgers	Red Lobster
Brick House	J. Alexanders	Red Robin
Brio	Joes American	Rockbottom
Brixx Pizza	Joe's Crab Shack	Romano's MG
Buca di Beppo	Kona Grill	Roy's
Buffalo Wild Wings	Landry's Seafood	Ruby Tuesday
CA Pizza Kitchen	Legal Seafood	Rusty Bucket, The
Cantina Laredo	Logan's Roadhouse	Ruth's Chris
Capital Grille	Lone Star	Saltgrass Steakhouse
Carino's	Longhorn Steakhouse	Seasons 52
Carolina Ale House	Lucky Strike	Smokey Bones
Carrabbas	Maggiano's	Ted's Montana Grill
Champps	Max & Erma's	Texas de Brazil
Charlie Brown's	McCormick & Schmick's	Texas Land & Cattle
Chart House	Mellow Mushroom	Texas Roadhouse
Cheddar's	Melting Pot, The	TGI Fridays
Cheeseburger in Paradise	Miller's Ale House	The Pub
Cheesecake Factory	Mimi's Café	Tilted Kilt
Claim Jumper	Mitchell's Seafood	Tony Roma's
Daily Grill	Morton's	Umami Burger
Duffy's Sports Grill	Not Your Average Joes	Uno Chicago Grill
Famous Dave's	O'Charleys	Yard House

**Note: Excerpt data is based on a sample and ranking may not be identical to that found in published report. Actual report will provide 25-50 top ranked brands and suppliers.**

### Top 10 Wine Brands by BTG Distribution

#### Top 10 Wine Brands by BTG Distribution

Rank	Brand	# Listings
1	Sutter Home	666
2	Kendall-Jackson	554
3	Beringer	476
4	Cultivate	438
5	Chateau Ste. Michelle	354
6	Ecco Domani	337
7	J. Lohr	304
8	Barefoot	266
9	Copperidge	248
10	Cupcake	243

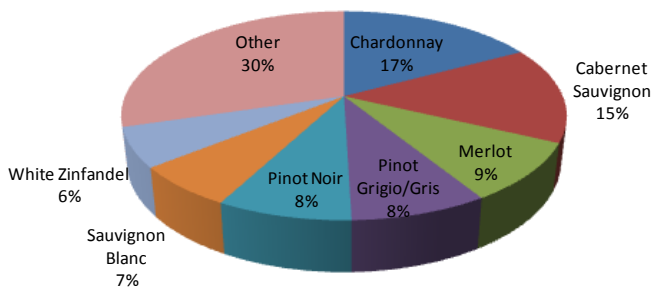
### Top 10 Beer Brands by Draft and Bottle Distribution

#### Top 10 Beer Brands, Draft and Bottles\*

Rank	Brand	# Listings
1	Budweiser	559
2	Corona	503
3	Samuel Adams	357
4	Coors	270
5	Blue Moon	264
6	Miller	257
7	Heineken	245
8	Michelob	245
9	Newcastle	88
10	Stella Artois	84

\* Brand includes all products including light beers

### BTG Distribution by Variety



### Top 10 Spirit Brands on Cocktail Lists

#### Top 10 Spirit Brands on Cocktail Lists

Rank	Brand	# Listings
1	Sauza	1195
2	DeKuyper	833
3	Generic	791
4	Bacardi	781
5	Cointreau	749
6	Absolut	676
7	Patron	611
8	Smirnoff	604
9	Malibu	520
10	Grand Marnier	461

**2014 Advance Report Excerpts –  
Top Suppliers/Producers by Variety**

**Top 10 Brands in BTG Distribution:  
Chardonnay**

<b>Rank</b>	<b>Brand</b>	<b># Listings</b>	<b>Ave. Price</b>
1	Kendall-Jackson	250	\$9.08
2	Woodbridge	160	\$5.69
3	Chateau Ste. Michelle	109	\$9.15
4	Sonoma-Cutrer	98	\$12.38
5	Toasted Head	94	NA
6	Settesoli	77	\$6.50
7	Yellow Tail	50	\$5.67
8	Jacob's Creek	42	\$7.00
9	Clos du Bois	41	\$7.74
10	Sebastiani	37	\$8.22

**Top 10 Suppliers in BTG Distribution:  
Chardonnay**

<b>Rank</b>	<b>Brand</b>	<b># Listings</b>	<b>Ave. Price</b>
1	Constellation Brands	404	\$8.01
2	Jackson Family Wines	293	\$9.59
3	Ste. Michelle Wine Est.	136	\$8.65
4	E&J Gallo	116	\$7.60
5	Brown Forman	98	\$12.38
6	Palm Bay International	85	\$8.52
7	Treasury Wine Estates	82	\$7.99
8	Trincherro	67	\$7.43
9	Diageo	56	\$7.92
10	Deutsch Family W&S	51	\$6.09

## 2014 Advance Report Excerpts – Continued

### Chain Overview: Bar Louie

Bar Louie has an average-sized BTG wine list with 21 listings and it offers primarily mainstream brands and varieties.

Its beer list is almost twice the size of the BTG wine selection with 39 listings in draft and bottle.

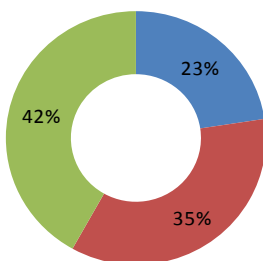
The cocktail is large and diverse encompassing 33 cocktails, many including luxury spirits such as Patron, Grand Marnier and Grey Goose.

Wine selection has pricing but cocktail and beer lists do not.

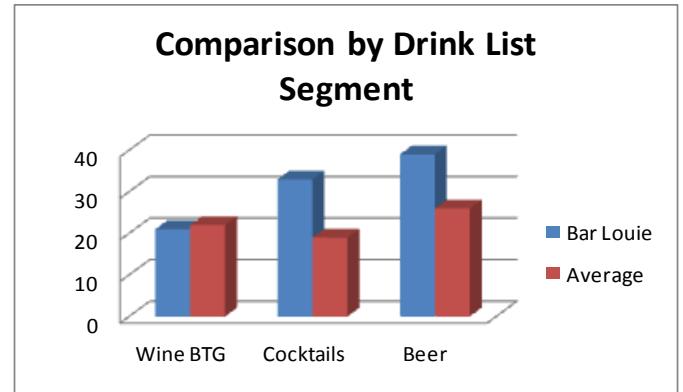
### Drinks List by Type (Wine BTG, Beer and Cocktails)

#### Bar Louie Drink Listings by Type

■ Wine BTG ■ Cocktails ■ Beer

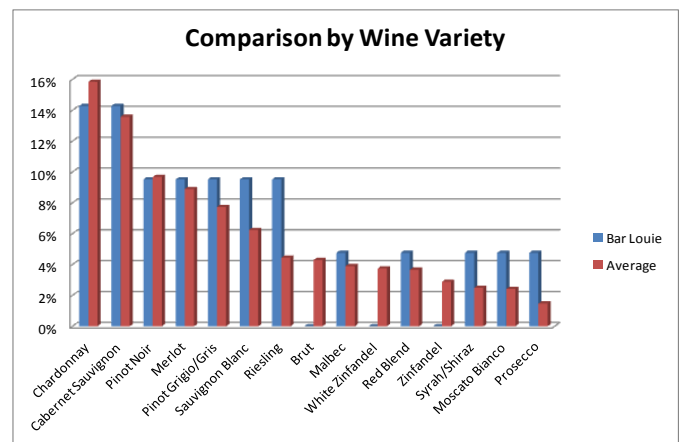


### Drink List Segments vs. Casual Average



### Wine BTG Selection – 21 Listings

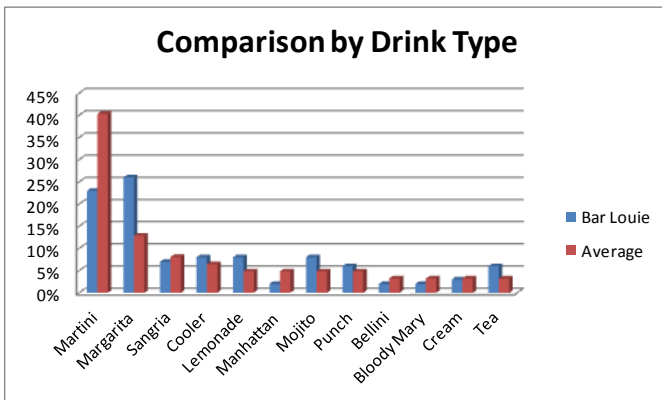
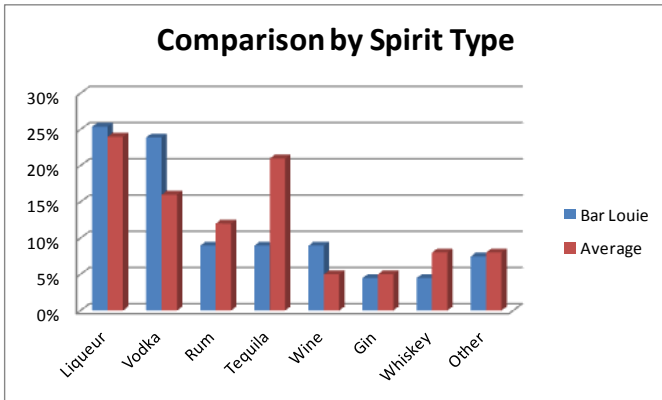
Bar Louie’s wine by-the-glass selections largely follow the casual dining average. It offers significantly more Riesling than the average list and lacks a Brut, Zinfandel and White Zinfandel normally found in the average list.





## Cocktail Selection - 39 Listings

Bar Louie is known for its martini selection and therefore has a much higher percentage of that drink type on its menu. This also explains the much higher percentage of vodka present on its list.

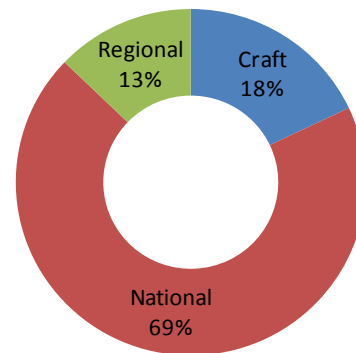


## Beer Selection – 33 Listings

Bar Louie has a somewhat diverse beer selection. National brands make up over 2/3 of the list with craft beer providing about a fifth of the total.

The craft beers present on its list vary from the common (Samuel Adams) to esoteric local brews.

## Beer List by Brand Type



## Craft Beer Selection

Craft Beer; Brands	# Products
Altech's Lexington	1
Goose Island	2
Kona	1
Lagunitas	1
Revolution	2
Samuel Adams Seasonal	1
Two Brothers	1
<b>Total</b>	<b>9</b>