

## Dark Spirits - US - October 2013

Report Price: £2466.89 | \$3995.00 | €3133.71

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.



“Despite its recent success, the dark spirits category still faces obstacles to becoming more commonplace in consumers’ alcohol routines. Flavor innovation and new products have piqued some interest, but ongoing sales are dependent on consumer loyalty, not just product trial. Manufacturers must emphasize the variety and versatility available from products.”  
– Jennifer Zegler, Beverage Analyst

### This report looks at the following areas:

- What can inspire more frequent consumption of dark spirits?
- How can manufacturers increase on-premise sales of dark spirits?
- Can brandy and Cognac capitalize on rise of competitive dark spirits?
- How can the segment appeal to drinkers who are inactive in dark spirits?

The dark spirits market has come through the economic downturn with growth in both volume and dollar sales. In 2008, volume sales of dark spirits were nearly 77 million 9-liter cases for \$20.3 billion in sales. By 2013, dark spirits sales are estimated to rise to nearly 82 million 9-liter cases for \$22.3 billion in sales. The category is forecast to continue growing in dollar sales with Mintel predicting \$26 billion in sales in 2018. However, its success hinges upon innovations that address the needs of the dark spirits consumer, not just following along with industry trends, such as sweet flavors.

Driving the category’s growth is the increase in consumers’ interest in whiskey. The segment’s rise has helped to increase sales not only of whiskey, but also growth in cordials and liqueurs. The segment is benefiting from brands that are inspired by or line extensions of whiskey, such as Jack Daniel’s Tennessee Honey. However, the additional interest in whiskey, cordials, and liqueurs has yet to boost the brandy and Cognac segment, which has grown from 2008-13, but not at the rates shown in the competitive segments.

The category’s positive performance comes during a time when consumers of legal drinking age, especially those aged 22-34, report drinking a variety of alcoholic beverages, not just white spirits. Indeed, dark spirits drinkers are most likely to drink the surveyed segments a few times a month (32%) or less than once a month (27%), which is a similar frequency as shown by white spirits and RTD drinkers, Mintel consumer research finds. Thus, dark spirits manufacturers must cultivate loyalty among consumers who are fond of all alcoholic beverages.

This report builds on the analysis presented in Mintel’s *Dark Spirits-U.S., September 2012*. The category also was covered in the following past reports: *Spirits: The Consumer-U.S., September 2011*; *Spirits: The Market-U.S., September 2010*; *Spirits: The Consumer-U.S., August 2010*; *Spirits-U.S., August 2009*; *Premium Brand Alcohol-U.S., March 2008*; *White and Dark Spirits: The Market-February 2007*; and *White and Dark Spirits: The Consumer-U.S., April 2007*.

BUY THIS  
REPORT NOW

VISIT:  
[store.mintel.com](http://store.mintel.com)

CALL:  
EMEA  
+44 (0) 20 7606 4533

Brazil  
0800 095 9094

Americas  
+1 (312) 943 5250

APAC  
+61 (0) 2 8284 8100

EMAIL:  
[oxygen@mintel.com](mailto:oxygen@mintel.com)

### DID YOU KNOW?

This report is part of a series of reports, produced to provide you with a more holistic view of this market

# Dark Spirits - US - October 2013

Report Price: £2466.89 | \$3995.00 | €3133.71

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

## Table of Contents

### Scope and Themes

What you need to know  
 Definition  
 Data sources  
 Sales data  
 Consumer survey data  
 Advertising creative  
 Abbreviations and terms  
 Abbreviations  
 Terms

### Executive Summary

Overview  
 The market  
 Innovation, rise in premium products help dark spirits market grow through 2018  
 Figure 1: Total U.S. sales and fan chart forecast of dark spirits, at current prices, 2008-18  
 Whiskey remains the dominant segment, but cordials and liqueurs growing faster  
 Figure 2: U.S. volume sales of dark spirits, by segment, 2008-13  
 Still the smallest subsegment, Irish whiskey outgrowing more dominant types  
 Figure 3: U.S. volume sales of whiskey, by type, 2008-13  
 The consumer  
 Whiskey leads category, but cordials and liqueurs have the most ageless appeal  
 Figure 4: Consumption of dark spirits, by age, August 2013  
 Dark spirits benefits from at-home, during the week consumption  
 Figure 5: Locations for spirits and RTDs consumption, by category, August 2013  
 Brandy and Cognac least likely to be limited to consumption only once a month  
 Figure 6: Frequency of dark spirits consumption by consumption of dark spirits, August 2013  
 Trial of new whiskies driven more by price than by flavor  
 Figure 7: Attitudes toward new whiskey purchases, by gender, August 2013  
 What we think

### Issues and Insights

What can inspire more frequent consumption of dark spirits?  
 Issues  
 Insights  
 How can manufacturers increase on-premise sales of dark spirits?  
 Issues  
 Insights

BUY THIS  
 REPORT NOW

VISIT: [store.mintel.com](http://store.mintel.com)  
 CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094  
 Americas +1 (312) 943 5250 | APAC +61 (0) 2 8284 8100  
 EMAIL: [oxygen@mintel.com](mailto:oxygen@mintel.com)

# Dark Spirits - US - October 2013

**Report Price:** £2466.89 | \$3995.00 | €3133.71

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Can brandy and Cognac capitalize on rise of competitive dark spirits?

Issues

Insights

How can the segment appeal to drinkers who are inactive in dark spirits?

Issues

Insights

## Trend Applications

Trend: The Real Thing

Trend: Experience Is All

Mintel Futures: East Meets West

## Market Size and Forecast

Key points

Dark spirits rebound from recessionary declines to post annual growth

Figure 8: U.S. volume sales of dark spirits, 2008-13

Prices play a part in bright outlook for dark spirits forecast through 2013

Figure 9: Total U.S. sales and forecast of dark spirits, at current prices, 2008-18

Figure 10: Total U.S. sales and forecast of dark spirits, at inflation-adjusted prices, 2008-18

Fan chart forecast

Figure 11: Total U.S. sales and fan chart forecast of dark spirits, at current prices, 2008-18

## Market Drivers

Key points

Nearly three in 10 adults of legal drinking age do not drink or use alcohol

Figure 12: Consumption of alcohol, by gender and age, August 2013

Figure 13: Consumption of alcohol, by race and Hispanic Origin, August 2013

Introduction, education could bring new consumers into category

Figure 14: Consumption of dark spirits, by gender, August 2013

Figure 15: Consumption of spirits and RTDs, by type, August 2013

Dark spirits need to appeal to fast-growing 55+ population

Figure 16: U.S. population aged 21 or older, by age, 2008-18

Figure 17: Consumption of dark spirits, by generations, August 2013

Multicultural population growth brightens dark spirits' prospects

Figure 18: U.S. population aged 21 or older, by race and Hispanic origin, 2008-18

Figure 19: Consumption of dark spirits, by race/Hispanic origin, August 2013

## Competitive Context

People are curious about alcohol, but some prefer beer, wine to spirits

Figure 20: Reasons for not drinking spirits or RTDs, August 2013

Beer, wine have appeal over spirits at home or away

Figure 21: Total U.S. retail sales and forecast of alcohol for home-based consumption, by segment, at current prices, 2007-17

**BUY THIS  
REPORT NOW**

VISIT: [store.mintel.com](http://store.mintel.com)

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | APAC +61 (0) 2 8284 8100

EMAIL: [oxygen@mintel.com](mailto:oxygen@mintel.com)

# Dark Spirits - US - October 2013

**Report Price:** £2466.89 | \$3995.00 | €3133.71

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 22: Alcohol types typically ordered on-premise, by gender, October 2012

Cross-category consumption limits frequency within spirits, RTDs

Figure 23: Frequency of consumption of spirits and RTDs, by category, August 2013

Figure 24: Diageo coupon ad, September 2013

## Segment Performance

Key points

Cordials, liqueurs report highest growth of dark spirits segments

Figure 25: U.S. volume sales of dark spirits, by segment, 2008-13

Figure 26: U.S. volume sales of dark spirits, by segment, 2011 and 2013

American straight whiskey, Canadian whisky lead sales, preferences

Figure 27: U.S. volume sales of whiskey, by segment share, 2012

Irish whiskey remains a small subsegment, but outgrowing fellow whiskies

Figure 28: U.S. volume sales of whiskey, by type, 2008-13

Figure 29: U.S. whiskey volume sales, by subsegment, 2012 and forecasted 2017 sales

## Retail Channels

Key points

Retail sales far exceed on-premise sales, but bars and restaurants gaining

Figure 30: U.S. volume sales of dark spirits, by channel, 2008-13

Figure 31: U.S. volume sales of dark spirits, by channel, 2011-13

Cocktails and exclusive offerings could reinvigorate on-premise

## Leading Companies

Key points

Alcohol manufacturers defend market share, post positive sales

Figure 32: Dark spirits leading companies, by volume sales, 2011 and 2012

Amid global goals, Diageo adds marketing, ups prices in North America

Brown-Forman upgrades to distilleries of its leading whiskey brands

## Brand Share – Whiskey

Key points

Jameson, Woodford Reserve, Maker's Mark perform best in rising segment

Figure 33: Leading brands of whiskey, by volume sales, 2011 and 2012

Increased interest inspires whiskey manufacturers get more creative

Figure 34: U.S. whiskey launches, by launch type, 2011-13\*

Top four bourbons appeal across ages, with Jack Daniel's on top

Figure 35: Consumption of top 10 bourbon whiskey brands, by age, May 2012-June 2013

Jack Daniel's expands all-age appeal with new expressions

Crown Royal leads Canadian whisky brands, enters flavored arena

Figure 36: Consumption of Canadian whisky brands, by gender and household income, May 2012-June 2013

Scotch whisky not just for men, although not all brands have unisex appeal

**BUY THIS  
REPORT NOW**

VISIT: [store.mintel.com](http://store.mintel.com)

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | APAC +61 (0) 2 8284 8100

EMAIL: [oxygen@mintel.com](mailto:oxygen@mintel.com)

# Dark Spirits - US - October 2013

**Report Price:** £2466.89 | \$3995.00 | €3133.71

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 37: Consumption of top 10 Scotch whisky brands, by gender, May 2012-June 2013

**Irish whiskey brands find individual appeal between genders, incomes**

Figure 38: Consumption of Irish whiskey brands, by gender, May 2012-June 2013

Figure 39: Consumption of Irish whiskey brands, by household income, May 2012-June 2013

## Brand Share – Cordials and Liqueurs

**Key points**

**Whiskey's popularity reaches and lifts segment performance**

Figure 40: Leading brands of cordials and liqueurs, by volume sales, 2011 and 2012

**Cordials and liqueurs find their own niches, but usage remains infrequent**

Figure 41: Consumption of cordial and liqueur brands, by age, May 2012-June 2013

Figure 42: Cordial and liqueur brand consumption, by gender and household income, May 2012-June 2013

## Brand Share – Brandy and Cognac

**Key points**

**Premium brands drive sales, but not enough to keep pace with competition**

Figure 43: Leading brands of Brandy and Cognac, by volume sales, 2011 and 2012

**Cognac connects with blacks, Hispanics of all ages**

Figure 44: Consumption of cognac brands, by race and Hispanic origin and age, May 2012-June 2013

**Unlike Cognac, brandy lacks appeal to higher-income drinkers**

Figure 45: Consumption of Brandy brands, by gender and household income, May 2012-June 2013

## Innovations and Innovators

**Dark spirits lag in innovation compared to other alcoholic categories**

Figure 46: U.S. new alcoholic beverage products, by GNPD subcategory, August 2012-13

Figure 47: U.S. dark spirits launches, by segment, 2008-2013\*

**Hybrid products blend influence, liquors for broader appeal**

**Flavor innovations range from sticky sweet to seasonal selections**

**Packaging also sets products apart in growing category**

## Marketing Strategies

Figure 48: Measured ad spending by distilled spirits category, 2011-12

**Theme – Craftsmanship**

Figure 49: Jack Daniel's "Barrels" broadcast ad still, September 2012

Figure 50: Gentleman Jack "Secret Meetings" broadcast ad still, April 2013

**Theme – Quirky**

Figure 51: Southern Comfort "Beach" broadcast ad still, August 2012

Figure 52: Southern Comfort "Karate" broadcast ad still, August 2013

**Theme – Celebrity endorsement**

Figure 53: Hennessy "Hennessy x Nas" broadcast ad still, June 2013

Figure 54: Hennessy Nas print ad, June/July 2013

Figure 55: Hennessy Wild Rabbit print ad, June/July 2013

**BUY THIS  
REPORT NOW**

VISIT: [store.mintel.com](http://store.mintel.com)  
CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094  
Americas +1 (312) 943 5250 | APAC +61 (0) 2 8284 8100  
EMAIL: [oxygen@mintel.com](mailto:oxygen@mintel.com)

# Dark Spirits - US - October 2013

**Report Price:** £2466.89 | \$3995.00 | €3133.71

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

## Social Media

### Key points

#### Key social media metrics

Figure 56: Key social media metrics, dark spirits, September 2013

### Market overview

#### Brand usage and awareness

Figure 57: Usage and awareness of selected dark spirits brands, August 2013

#### Interaction with dark spirits brands

Figure 58: Interaction with dark spirits brands, August 2013

#### Online conversations

Figure 59: Online mentions around selected dark spirits brands, by day, March 24-Sept. 23, 2013

#### Where are people talking about dark spirits brands?

Figure 60: Online mentions around selected dark spirits brands, by page type, March 24-Sept. 23, 2013

#### What are people talking about?

Figure 61: Online conversations around selected dark spirits brands, March 24-Sept. 23, 2013

Figure 62: Online conversations around selected dark spirits brands, by day, March 24-Sept. 23, 2013

### Analysis by brand

#### Hennessy

Figure 63: Social media metrics-Hennessy, September 2013

#### Key online campaigns

Figure 64: Word cloud representing terms associated with Hennessy's "White Rabbit" campaign, Sept. 1, 2012-Sept. 25, 2013

#### What we think

#### Jack Daniel's

Figure 65: Social media metrics-Jack Daniel's

#### Key online campaigns

#### What we think

#### Southern Comfort

Figure 66: Social media metrics-Southern Comfort, September 2013

#### Key online campaigns

#### What we think

#### Crown Royal

Figure 67: Social media metrics-Crown Royal, September 2013

#### Key online campaigns

#### What we think

#### Baileys

Figure 68: Social media metrics-Baileys, September 2013

#### Key online campaigns

#### What we think

#### Maker's Mark

**BUY THIS  
REPORT NOW**

VISIT: [store.mintel.com](http://store.mintel.com)

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | APAC +61 (0) 2 8284 8100

EMAIL: [oxygen@mintel.com](mailto:oxygen@mintel.com)

## Dark Spirits - US - October 2013

Report Price: £2466.89 | \$3995.00 | €3133.71

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 69: Social media metrics-Maker's Mark, September 2013

Key online campaigns

What we think

### The Consumer – Segment Preferences and Attitudes

Key points

Whiskey leads category, but cordials and liqueurs have ageless appeal

Figure 70: Consumption of dark spirits, by age, August 2013

Cross-promotion, hybrid spirits could court new drinkers, occasions

Figure 71: Consumption of dark spirits by consumption of dark spirits, August 2013

Figure 72: Consumption of dark spirits by consumption of white spirits and RTDs, August 2013

Dark spirits drinkers less concerned with 'skinny,' better see health angle

Figure 73: Attitudes about spirits and health, by spirits consumption, August 2013

Flavors not seen as intriguing in dark spirits as in white spirits

Figure 74: Attitudes about flavored spirits, by dark spirits consumption, August 2013

Product origin more important to dark spirits drinkers than white spirits

Figure 75: Attitudes about spirits consumption on-premise, by dark spirits consumption, August 2013

### The Consumer – Drinking Occasions

Key points

Few times a month or less most likely in dark spirits category

Figure 76: Frequency of dark spirits consumption, by gender, August 2013

Figure 77: Frequency of dark spirits consumption, by race/Hispanic origin, August 2013

Nearly three quarters of drinkers prefer to imbibe dark spirits at home

Figure 78: Locations, timing, and occasions of spirits and RTDs consumption, by category, August 2013

Category at an advantage when it comes to during the week consumption

Figure 79: Timing of dark spirits consumption, by gender, August 2013

Northeast, Midwest dark spirits fans a target for more social drinking

Figure 80: Occasions for dark spirits consumption, by region, August 2013

On-premise opportunities can expand appeal to varying ages

Figure 81: Locations for dark spirits consumption, by age, August 2013

Premium brands, cocktails have entry point in on-premise venues

Figure 82: Attitudes about spirits consumption on-premise, by spirits consumption, August 2013

Higher household incomes influence venue in which spirits are consumed

Figure 83: Locations for dark spirits consumption, by region, August 2013

Dark spirits could be tied in with meal times for new usage occasion

Figure 84: Occasions for dark spirits consumption, by age, August 2013

Figure 85: Occasions for dark spirits consumption, by gender, August 2013

### The Consumer – Preferences for Other Dark Spirits

Key points

BUY THIS  
REPORT NOW

VISIT: [store.mintel.com](http://store.mintel.com)

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | APAC +61 (0) 2 8284 8100

EMAIL: [oxygen@mintel.com](mailto:oxygen@mintel.com)

## Dark Spirits - US - October 2013

Report Price: £2466.89 | \$3995.00 | €3133.71

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Brandy, Armagnac, and Cognac least likely to be limited to once a month

Figure 86: Frequency of dark spirits consumption by consumption of dark spirits, August 2013

Education, new recipes could expand brandy, Armagnac, Cognac usage

Figure 87: Brandy, Armagnac, and Cognac consumption by preferred drink type, August 2013

Variations in types of cordials, liqueurs influences preferred drink types

Figure 88: Cordial and liqueur consumption by preferred drink type, by gender, August 2013

Figure 89: Cordial and liqueur consumption by preferred drink type, by age, August 2013

Cream liqueurs favored by lower incomes, non-cream by more affluent

Figure 90: Adult consumption of cordials and liqueurs, by form, by household income, May 2012-June 2013

Cordials and liqueurs have opportunity to court more affluent drinkers

Figure 91: Consumption of dark spirits, by household income, August 2013

### The Whiskey Consumer – Drinking Occasions

Key points

Men like whiskey neat, while women prefer it with mixers

Figure 92: Whiskey consumption by preferred drink type, by Gender, August 2013

Figure 93: Whiskey consumption by preferred drink type, by age, August 2013

Neat, on the rocks consumers likely part of the quality-conscious segment

Figure 94: Attitudes toward whiskey, by drink type, by gender, August 2013

Brands hold sway in consumer choice, but process gaining influence

Figure 95: Important attributes influencing whiskey purchases, by gender, August 2013

Figure 96: Attitudes toward whiskey production, by gender, August 2013

Recommendations connect with women, younger whiskey buyers

Figure 97: Important attributes influencing whiskey purchases, by age, August 2013

Trial of new whiskeys driven mostly by price then by flavor

Figure 98: Attitudes toward new whiskey purchases, by gender, August 2013

Value whiskeys could counter premiumization by emphasizing ordinariness

Quality-conscious whiskey drinkers likely drivers of craft distilling boom

Figure 99: Attitudes toward whiskey, by drink type, by gender, August 2013

### The Whiskey Consumer – Subsegment Preferences

Key points

American, Irish whiskeys only subsegments to have unisex appeal

Figure 100: Consumption of whiskey by type, by gender, August 2013

Older whiskey drinkers more willing to consume across segments

Figure 101: Consumption of whiskey by type, by age, August 2013

Whiskey fans more aware of subsegments than white spirits drinkers

Production processes, price hold sway in particular subsegments

Whiskey drinkers experiment with subsegments from similar places

Figure 102: Consumption of whiskey by type, by consumption of whiskey by type, August 2013

Irish whiskey drinkers open to new products, Scotch fans cue in on quality

BUY THIS  
REPORT NOW

VISIT: [store.mintel.com](http://store.mintel.com)

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | APAC +61 (0) 2 8284 8100

EMAIL: [oxygen@mintel.com](mailto:oxygen@mintel.com)



# Dark Spirits - US - October 2013

**Report Price:** £2466.89 | \$3995.00 | €3133.71

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 103: Attitudes toward spirits by consumption of whiskey by type, August 2013

RTDs could be new frontier for various subsegments

Figure 104: Consumption of whiskey by type, by consumption of spirits and RTDs, August 2013

## Key Driver Analysis – American Straight Whiskey

Methodology

American whiskey drinkers a young, active, and patriotic group

Figure 105: Key drivers of drinking American straight whiskey and/or bourbon consumption, October 2013

## Correspondence Analysis

Methodology

Dark spirits fans have versatile approach to drink styles in the category

Figure 106: Correspondence Analysis, October 2013

Figure 107: Dark spirit consumption by preferred drink type, October 2013

## Appendix – Other Useful Consumer Tables

Segment Performance

Figure 108: Total U.S. volume sales of whiskey, at current prices, 2008-13

Figure 109: U.S. volume sales of cordials and liqueurs, at current prices, 2008-13

Figure 110: U.S. volume sales of brandy and Cognac, at current prices, 2008-13

Retail Channels

Figure 111: U.S. on-premise volume sales of dark spirits, at current prices, 2008-13

Figure 112: U.S. off-premise volume sales of dark spirits, at current prices, 2008-13

The Consumer – Segment Preferences and Attitudes

Figure 113: Consumption of alcohol, by household income, August 2013

Figure 114: Consumption of dark spirits, by region, August 2013

Figure 115: Consumption of dark spirits, by consumption of white spirits, August 2013

Figure 116: Consumption of dark spirits by consumption of RTDs, August 2013

Figure 117: Agreement with attitudes and behaviors toward spirits, by consumption of spirits and RTDs, August 2013

The Consumer – Drinking Occasions

Figure 118: Locations dark spirits consumption, by gender, August 2013

Figure 119: Timing for dark spirits consumption, by age, August 2013

Figure 120: Timing of dark spirits consumption, by region, August 2013

Figure 121: Locations, timing, and occasions of dark spirits consumption, by consumption of dark spirits, August 2013

The Consumer – Other Dark Spirits Preferences

Figure 122: Adult consumption of cordials and liqueurs, by form, by age, May 2012-June 2013

Figure 123: Adult consumption of cordials and liqueurs, by kind, by household income, May 2012-June 2013

The Whiskey Consumer: Drinking Occasions

Figure 124: Spirits consumption by preferred drink type, by segment, August 2013

Figure 125: Important attributes influencing whiskey purchases, by region, August 2013

Figure 126: Attitudes toward whiskey, by region, August 2013

**BUY THIS  
REPORT NOW**

VISIT: [store.mintel.com](http://store.mintel.com)

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | APAC +61 (0) 2 8284 8100

EMAIL: [oxygen@mintel.com](mailto:oxygen@mintel.com)

## Dark Spirits - US - October 2013

Report Price: £2466.89 | \$3995.00 | €3133.71

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

### Appendix – Social Media

#### Brand usage or awareness

- Figure 127: Brand usage or awareness, August 2013
- Figure 128: Southern Comfort usage or awareness, by demographics, August 2013
- Figure 129: Crown Royal usage or awareness, by demographics, August 2013
- Figure 130: Jack Daniel's usage or awareness, by demographics, August 2013
- Figure 131: Maker's Mark usage or awareness, by demographics, August 2013
- Figure 132: Baileys usage or awareness, by demographics, August 2013
- Figure 133: Hennessy usage or awareness, by demographics, August 2013

#### Activities done

- Figure 134: Activities done, August 2013
- Figure 135: Southern Comfort – Activities done, by demographics, August 2013
- Figure 136: Crown Royal – Activities done, by demographics, August 2013
- Figure 137: Jack Daniel's – Activities done, by demographics, August 2013
- Figure 138: Maker's Mark – Activities done, by demographics, August 2013
- Figure 139: Baileys – Activities done, by demographics, August 2013
- Figure 140: Hennessy – Activities done, by demographics, August 2013

#### Online conversations

- Figure 141: Online mentions around selected dark spirits brands, by day, March 24-Sept. 23, 2013
- Figure 142: Online mentions around selected dark spirits brands, by page type, March 24-Sept. 23, 2013
- Figure 143: Online conversations around selected dark spirits brands, March 24-Sept. 23, 2013
- Figure 144: Online conversations around selected dark spirits brands, by day, March 24-Sept. 23, 2013

### Appendix – Key Driver Analysis

- Figure 145: American Straight Whiskey and/or bourbon consumption-key driver output, October 2013

### Appendix – Trade Associations

**BUY THIS  
REPORT NOW**

VISIT: [store.mintel.com](http://store.mintel.com)  
 CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094  
 Americas +1 (312) 943 5250 | APAC +61 (0) 2 8284 8100  
 EMAIL: [oxygen@mintel.com](mailto:oxygen@mintel.com)