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**DISTILLED SPIRIT  
FLAVOR PREFERENCES  
IN THE NETHERLANDS  
AND INFLUENCE OF  
DEMOGRAPHICS**

**By Wiktor Aladowicz**

**Title**

Distilled Spirit Flavor Preferences in the Netherlands and Influence of Demographics

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**Author**

Wiktoria Aladowicz

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**Study**

4<sup>th</sup> year International Food Business

**Coach**

Alice Rodenburg

**Location**

AERES University of Applied Sciences  
De Drieslag 4  
8251 JZ Dronten  
The Netherlands

# PREFACE

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This research is conducted by Wiktor Aladowicz, a 21-year-old International Food Business student in The Netherlands and serves as the final Bachelor's Thesis. The final Bachelor's Thesis is an important part of the graduation for both the AERES University of Applied Sciences in Dronten, the Netherlands and the Dalhousie University in Truro, Canada.

During my 4<sup>th</sup> year, my interest for new product development (NPD) has grown. During my internship at Amsterdam Republic Spirits b.v. I got to experience a bit of the NPD process myself, which has inspired me and has served as motive for the research topic.

The paper has been written individually. However, I want to thank all involved in doing this research. I would like to credit my colleagues from Amsterdam Republic Spirits b.v. for inspiring me before and during the research, and I would like to credit my supervisor Alice Rodenburg for supporting, mentoring, and providing necessary feedback along the research.

I would additionally like to thank the assessors that have provided me with necessary feedback. Parts of the introduction and materials and methods could have therefore been improved. The research objective as well as the knowledge gap have been adjusted to strengthen the relevance of the research. Minor adjustments have found place in the material and methods too.

Wiktor Aladowicz  
Harderwijk, The Netherlands, 12/06/2023

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## SUMMARY

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Due to various lockdowns during the pandemic, the hospitality industry in the Netherlands experienced a shrinkage (CBS, 2021). This had an effect on the entire supply chain, including on the entire alcoholic sector, and the distilled sector in particular (Slijtersvakblad, 2022). Worldwide, the market has recovered much faster than expected due to the youth being the global revival after the pandemic (Horckmans, 2022). This recovery has also been noticed in the Netherlands as the turnover in the hospitality industry (CBS, 2022). After the lockdown, the overall popularity of spirits increased (van Beek, 2021), and millennials and the young-age population seem to be the driving factor behind the growing demand for flavored drinks (Data Bridge, 2021). This finding together with recent trends and developments in the Dutch distilled spirit market have created space for opportunities for distilled spirit manufacturers and retailers world-wide to explore. Yet it is unknown what flavors to focus on. Therefore, this research is meant to help the manufacturers and retailers focus on developing and promoting a wide range of flavors that cater to the preferences of their target consumers in the Netherlands. Helping the manufacturers and retailers in the decision-making process intends to reach new sales peaks among these manufacturers and retailers world-wide. The main objective is to find out the distilled spirits flavor preferences of the Dutch population and the influences of demographics (gender and generation) by conducting quantitative research on the consumer perspective (a questionnaire), and qualitative research on the expert level (an interview). A total of 191 respondents completed the questionnaire, out of which 167 were considered relevant for the study, and 7 interviews have been taken.

The questionnaire provided results to answer the following sub-questions: (1) to what extent is flavor a driver when it comes to buying distilled spirits? And (2) how do different demographics influence the flavor preferences? The findings have shown that the respondents only consume flavored distilled spirits under certain circumstances and in certain locations. A significant part of these respondents has also identified to only consume unflavored distilled spirits under any of the circumstances. When it comes to demographics it has appeared that gender almost doesn't have an influence on the flavor preferences of the respondents, but generation on the other hand does have influence in some cases.

The interviews helped answering sub-question 3: what are the expectations and opinions of hospitality entrepreneurs and liquor store owners regarding flavor demand for distilled spirits? It has turned out that the answers of the hospitality entrepreneurs have occurred to be less reliable and therefore valuable.

Based on the research findings and conclusions from the sub-questions, it was concluded that the flavor preferences of the Dutch population for distilled spirits are influenced by generations, with generation Z exhibiting a preference for fruity/citrus flavors, with exception to whiskey. Whiskey has been preferred unflavored by all generations, but liquor store owners anticipate this to change. Gender has appeared to have no influence on the flavor preferences in this research, but chocolate and creamy flavors are still recommended to be avoided.

# 1. INTRODUCTION

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An article that the CBS had published in 2021 states that the hospitality industry had been negatively impacted by the Covid-19 pandemic. Partly due to various lockdowns during the year, the hospitality industry in the Netherlands experienced a shrinkage of 40.6% (CBS, 2021). This had a domino effect on the entire supply chain, including on the alcoholic sector (Slijtersvakblad, 2022). As a result, the revenue of the alcoholic industry in 2020 has been halved compared to the previous year (CBS, 2021). Other hospitality related industries in the Netherlands have also been affected, but the alcoholic industry has had the largest decline in comparison (CBS, 2021). This is because the beverage industry has the strongest connection with the hospitality industry compared to other industries (CBS, 2021). The distilled sector in particular has been devastated by the pandemic, small distilleries for example suffered from the crisis and had to close (Slijtersvakblad, 2022). But worldwide, the market has recovered much faster than expected as new peak sales were achieved (Horckmans, 2022).

It should further be noted that millennials in particular have proven to be the driving force behind the global revival after the pandemic (Horckmans, 2022). This generation, now between twenty-seven and forty-two years old, has considerable purchasing power and is particularly interested in premium products (Horckmans, 2022). This recovery has also been noticed in the Netherlands as the turnover in the hospitality industry in the second quarter of 2022 has shown to be higher than before the pandemic (CBS, 2022). As a result, the turnover in all underlying sectors rose (CBS, 2022). Based on millions of consumptions within 4000 hospitality locations, TAPP registered changing consumption needs within the sector (van Beek, 2021). TAPP is an organization that monitors and analyzes the consumption in 4000 businesses in the Netherlands (van Beek, 2021). TAPP collects sales data directly from the hospitality industry and translates it into consumption patterns and market developments (van Beek, 2021). It turned out that many people in the Netherlands order distilled spirits more often after the lockdown as distilled spirits appeared on bills almost 9% more often, in comparison with the period before the pandemic (van Beek, 2021). After the lockdown, the overall popularity of spirits increased (van Beek, 2021).

Concluding based on what has been stated above, it occurs that the current market opens a lot of opportunities for the distilled spirit manufacturers and retailers. Millennials and the young-age population seem to be the driving factor behind the growing demand for flavored drinks (Data Bridge, 2021). In this highly competitive industry distilled spirit producers are interested in creating new and attractive products, and it is therefore important to analyze the flavor choice during the product development process (Daute et al., 2021). But it is unknown what flavors to focus on and how demographics influence these preferences. Answering this would help many distilled spirits producers world-wide in the decision-making process and in reaching new sales peaks. A similar situation occurred in 2008 when Finland Vodka Company saw the opportunity and launched new flavored vodkas containing herb extracts, essences, fruits, fruit juices, and plant distillates, leading to a 30% increase in the sale of flavored vodkas (Jordão et al., 2015).

Furthermore, mouthfeel and texture are the main factors determining consumer's preferences for drinks (Jordão et al., 2015). Alcohol containing beverages can both create pleasurable tastes as can evoke sweet sensations and unpleasurable tastes as they might be perceived as too bitter (Lanier et al., 2005). But the human chemosensory system develops and adapts over time, meaning that younger people could significantly dislike a flavor that the older population finds pleasurable (Fewtrell et al., 2016). Therefore, this study focuses on the target groups of all adult ages that do drink alcohol which will be classified Care Givers of America (2022) into generations as shown in table 1. Generation Z entails people born between 1995-2012, meaning both children and adults are involved (Care Givers of America, 2022). This research only involves people of the Dutch legal drinking age (18+) and therefore only a part of Generation Z will be used.

**Table 1:** Overview of generations used for this research.

<b>Part of Generation Z</b>	18-26 years
<b>Millennials</b>	27-42 years
<b>Generation X</b>	43-58 years
<b>Baby Boomers</b>	59-80 years
<b>The Silent generation</b>	80+ years

Before researching the flavor preferences, it is important to define the flavor categories that are used in this paper. Flavor is a combination of taste and odor (K R et al., 2022). The addition of flavors and odors can help to disguise and improve the product flavor while also stimulating the acceptance of the product (K R et al., 2022). Flavor compounds in distilled spirits present various aromas as they can be classified into a wide variety of chemical classes (Barnes et al., 2022). For example, furans and heterocycles are responsible for caramellic aromas and esters are responsible for fruity notes (Barnes et al., 2022). This large range of chemical classes is used to define flavor categories in distilled spirits by Barnes et al. (2022). Nevertheless, this paper is meant to be comprehensible for everyone and will therefore use flavor categories defined by international brand ABC Fine Wine & Spirits.

According to the ABC Fine Wine & Spirits (n.d.), with hundreds of flavors, it is best to approach flavor categories as displayed in table 2. Note that the flavor categories have been edited by the author. Flavor categories such as 'citrus' and 'fruity' have been made one category as the examples are very similar and overlapping. The author has also added category 'spiced flavors' and classified 'botanical' and 'floral' into the same category.



**Table 2:** Flavor categories used in this report.

Category	Examples
Chocolate flavors	Think of white chocolate, dark chocolate and cacao
Creamy flavors	Think of whipped cream and ice cream
Coffee flavors	Think of espresso and coffee
Botanical / floral flavors	Think of elderflower, rose, basil, mint
Nutty	Think of different kind of nuts
Citrus /Fruity	Think of raspberry, pineapple, orange, apple, strawberry, mango, etc
Spiced flavors	Think of vanilla, cinnamon, ginger, lemongrass, chili

### 1.1 The alcohol industry globally

This chapter will start by taking a look at the alcohol industry world-wide. Any existing trends and developments or important aspects will be described as we will keep zooming in until the Dutch distilled spirit industry is reached.

Alcoholic beverages are drinks that contain ethyl alcohol (Data Bridge, 2021). Sugars from different kinds of ingredients such as fruits are used in the fermentation after the beverages are produced using the distillation process (Data Bridge, 2021). According to Jernigan, in 2008 approximately 38% of the world-wide alcohol consumption were branded alcoholic beverages, and the producers of these beverages were reliant on marketing activities for their survival. Those marketing activities are not only consisting of traditional advertising, promotion and sponsorship but also include new product development and product placement that is meant to increase the recognition, appeal and consumption of alcoholic products and brands (Jernigan, 2008). The alcohol industry is highly innovative, spirit producers for instance always try to upper their game by innovation (Jernigan, 2008). Therefore, in this industry brand and marketing knowledge are much more necessary rather than technological innovation when it comes to a company's survival (Jernigan, 2008). The industry's marketing wing spreads wide over various other industries such as the sport, advertisement and entertainment industry and has therefore varying degrees of vertical integration in different countries all around the world (Jernigan, 2008). It is important to note that world-wide the control of this industry is concentrated in the hands of just a small number of corporations (Jernigan & Ross, 2020). Within the 10 largest marketers of global distilled spirits between 1991 and 2006 are corporations such as DIAGEO, Pernod Ricard, Bacardi and United Spirits Ltd (Jernigan, 2008). On number one, DIAGEO has been the world largest distilled spirits producer between 1991 and 2006 (Jernigan, 2008). This has not changed in 2016 either, in fact, the corporation's global market share has expanded even more and is now reaching 20% (Jernigan & Ross, 2020).



These corporations have strong control on the global marketing of alcoholic products and could be seen as the biggest competitors in the eyes of smaller businesses (Jernigan, 2008). According to Casswell (2019), the major target markets of such leading corporations are expanding economies with youthful populations and increasing urbanization. By being a target of these corporations, these risk the implementation of effective policies in order to reduce and prevent heavy drinking, resulting in a significant impact on sales and profits (Casswell, 2019).

Furthermore, according to a study conducted in 2021 by Data Bridge, North America currently dominates the alcoholic beverages market due to the continent's high disposable income, and Asia-Pacific is forecasted to experience the fastest growth between 2021 and 2028 due to major efforts in the market's marketing and advertisement strategies. According to Statista, most revenue in the alcoholic beverages market is already being created in China (US\$336.40bn in 2023).

## 1.2 Europe – Entire alcohol Industry

Now that a look is taken of the global alcohol industry, we will zoom in on the European alcohol industry and the trends, patterns, and developments in relation to it. Europe is highly engaged in the global alcohol market in many various ways (Anderson & Baumberg, 2006). In 2006 the European Union (UN) has been involved in just under half of the global imports according to Anderson & Baumberg (2006). It's the root of a quarter of the global alcohol production and the EU is also labelled as the heaviest drinking region (Anderson & Baumberg, 2006). Beer accounted for nearly half of the consumption in Europe with 44%, wine accounted for 34% and spirits for 23% (Anderson & Baumberg, 2006). Frequent alcohol consumption is very common in Europe, especially in central and eastern Europe where people drink a couple times a week but not daily (Anderson & Baumberg, 2006). The consumption of alcohol during a meal in the afternoon/evening accounted for 40% of the drinking occasions in 2006 (Anderson & Baumberg, 2006). Southern European countries on the other hand have shown a declining trend of alcohol consumption in the past 30 to 40 years (Janssen et al., 2020). The World Health Organization (WHO) expects this downward trend to keep going across whole Europe (Spirits Europe, n.d.b).

Regarding patterns, according to the study conducted by Anderson and Baumberg (2006) it has occurred that just like in any other culture men are used to drink more, and more heavily, than women. According to the same study, social-economic status plays a significant role when it comes to drinking behavior, and people with a lower social-economic status seem to be less likely to drink alcohol. Furthermore, the study has pointed out that almost all students in Europe at the age of 15 and 16 years old have drunk alcohol at some point in their life, but their first-time drinking alcohol varies across European regions.

When it comes to the alcohol policies, the alcohol beverage industry is tightly controlled and regulated (Spirits EU, 2012). There are 2 international legal obligations set by the World Trade Organization (WTO) that affect the European alcohol policy the most, which are the General Agreement on Trade in Services (GATS) and the General Agreement on Tariffs and Trade (GATT). The WTO will always put more importance on health rather than trade (Anderson & Baumberg, 2006), and has always been the most active international

organization when it comes to alcohol (Schulz et al., 2022). It has proven to be an important guide for European alcohol policy (Schulz et al., 2022). An institution with a positive influence on the European alcohol policies is the European Union (EU) with its trade laws as they provide free trade within the EU and forbids discrimination of domestic goods (Schulz et al., 2022). Apart from the policies set by big international organizations, there are also laws and policies that every country in the EU individually has set (Kilian et al., 2019). For example, alcohol marketing, which is controlled differently depending on the country and marketing activity (Anderson & Baumberg, 2006). In 2006, 14 of the EU countries have banned advertisements on spirits according to Anderson & Baumberg. Sports sponsorships had the poorest restrictions, only 7 countries within the EU had any restrictions regarding these at all. According to the same author, another factor that varies across European countries is tax rates on alcoholic products. For example, the average highest tax rate is in the Northern of Europe while the Southern of Europe has the lowest average tax rate (Anderson & Baumberg, 2006).

Looking at the European alcoholic beverages market forecast, it is expected that the alcoholic beverages market will grow at a rate of 3.15% between 2021 and 2028 (Data Bridge, 2021). Another source has estimated that the market will even grow by 5.96% annually (Statista, 2023). The major factor for this growth is the millennial population driving the growth of alcoholic beverages market with their strongly rising demand (Data Bridge, 2021). The broad variety of in flavors for beers, spirits, and other alcoholic drinks, and rise in the consumer base for alcohol consumption especially among youth generation is influencing and will further influence the market (Data Bridge, 2021). But there has also been a rise in health and wellness awareness which is alleged to hinder this market growth (Data Bridge, 2021). Healthier substitutes such as non-alcoholic beverages have been a major development that is predicted to impact the alcoholic beverage market (Data Bridge, 2021). Apart from that, the European Parliament has taken health measures that will impact the European alcoholic beverages market too (Schulz et al., 2022). In order to control the alcohol consumption, in February 2022 the European Parliament has agreed on a far-reaching set of measures in its vote on “Strengthening Europe in the fight against cancer” (Schulz et al., 2022). The suggested measures include measures against different types of radiation, environmental pollution, as well as the consumption of tobacco and alcoholic beverages (Schulz et al., 2022). This way it can be argued that both the WTO and the European Union are highly engaged in preventing alcohol-related harm and there is a common “thrust” of both institutions (Schulz et al., 2022).

### 1.3 Europe – Distilled spirits industry

Taking a closer look at the European distilled spirits industry, it is important to define the variety of distilled spirit types, and the variety of distilled spirit types relevant to this research. Spirit drinks are divided into two categories: liquors and distilled spirits (K R et al., 2022). Distilled spirits contain alcohol percentages ranging from 30% to 50% (K R et al., 2022). They are alcoholic beverages created by the distillation of products containing sugars, such as fermented fruits, grains, or wine (Statista, 2023). The complexity of the European spirit variety is caused due to the differences in cultures. There are a lot of different cultures with

each their own distilled spirits. Their production methods vary across these cultures, the spirits can therefore vary from region to region (Sádecká et al., 2016). Therefore, there are numerous different types of distilled spirits, but in Europe traditional spirits are classified into 46 categories (Spirits Europe, n.d-a). Internationally well-known spirits include vodka, rum, whiskey, gin, liquor, and brandy (Spirits Europe, n.d-a). Apart from these there are a lot of less known spirits which have been born in different traditions and cultures in Europe such as the advocat, sambuca, and anis (Spirits Europe, n.d-a). The exports of these European spirits to non-European markets between 2002 and 2012 have risen 70% and are now being sold in over 200 world markets (Spirits Europe, 2012).

One of the main societal issues when it comes to distilled spirits in Europe is misuse (Spirits Europe, n.d-b) even though the marketing of distilled spirits in Europe is extremely controlled and regulated (Spirits Europe, 2012). It's highly important to ensure consumers are well informed, therefore the incorporation of Regulation 110/2008 is crucial for the proper functioning of the market (Spirits Europe, 2012). At least 23 countries in Europe have national consumer information websites providing relevant information, and since 2019, there is also a European general website at [www.responsibleddrinking.eu](http://www.responsibleddrinking.eu) (Spirits Europe, 2012). European distilled spirit producers continue to actively work on changing risky consumption behaviors since 2006 when the first EU Strategy on alcohol was adopted (Spirits Europe, 2012). Hundreds of prevention initiatives reflect the commitment of the European distilled spirit industry (Spirits Europe, n.d-c). Displaying advertisements within modest drinking occasions is one way the distilled spirit industry in Europe tries to create decent social norms (Spirits Europe, n.d-d). Despite all the efforts, over 80% of Europe's population aged 15+ classify as moderate drinkers (Spirits Europe, n.d-c). Most research does not point out a significant connection between the advertising being a influence on minors drinking behavior, but it does point out that peer pressure and parental education are the major influences (Spirits Europe, n.d-d).

Furthermore, between 2019 and 2025 the European distilled spirits industry is expected to grow at a compound annual growth rate (GAGR) of 2,9%, reaching \$118.6 billion in 2025 (Research and Markets, 2020). Once again, the major factor behind this expected high growth is (also in Europe) the increasing purchasing power of consumers, and the rising demand for natural flavors in alcoholic drinks (Research and Markets, 2020). The distilled spirit industry is facing profitable opportunities by creating a diverse availability of distilled spirits with innovative flavors (Data Bridge, 2021). The European distilled spirit industry is dominated by international organizations that also control the industry world-wide, including Berentzen-Gruppe, Pernod-Ricard, Remy Cointreau, Brown-Forman Corp., Diageo, Marie Brizard Wine & Spirits, Constellation Brands Inc., and Lapostolle (Data Bridge, 2021). These corporations are and will significantly contribute to this growth in the market share by constantly launching new products such as distilled spirits with new flavors (Research and Markets, 2020).

## 1.4 The Netherlands – Distilled spirits industry

This paper will examine the spirit flavor preferences of the Dutch adult population. But before going into which specific spirits are relevant to this paper, the whole distilled spirit industry will be further analyzed by focusing on the industry in The Netherlands. The Dutch distilled spirits market is expected to grow by 3.52% annually till 2027, and by that time, 47% of spendings in the distilled spirits sector will be attributable to consumption in hospitality abroad home (Statista, 2023-b). Despite the expected growth, the decreasing Dutch average alcohol consumption has become a trend as it has been decreasing for more than a decade, according to SpiritsNL (n.d.) which is the industry association for distilled spirits to which almost the entire sector is affiliated. According to the same source, the Dutch population also has shown a trend to start drinking on a later age, and the number of excessive and heavy drinkers has been falling for years. Compared to other European countries, the Netherlands has an average drinking pattern and scores low on alcohol addiction and other alcohol-related disorders (SpiritsNL, n.d.). Non-alcoholic alternatives seem to be a trend in the Netherlands too and are clearly gaining ground while growing into an adult category (STAP, 2022). This can be seen as a potential threat to the alcoholic sector, but with these trends and patterns going on it could also suggest that the Dutch population enjoy their alcoholic drinks in a responsible manner.

The combination of the Dutch responsible drinking pattern, the rising demand for natural flavors in alcoholic drinks, and the growing popularity of distilled spirits in the Netherlands seem to open enormous opportunities for distilled spirits producers world-wide.

Worldwide, and therefore also in the Netherlands, there is a set of factors that many worry it could potentially slow down the further growth of the sector (Horckmans, 2022). These factors include the impact of high inflation, the war in Ukraine, China's strict corona policy and the slow recovery in travel retail should also be pointed out (Horckmans, 2022). Despite that some of these trends may seem to hold back the distilled spirits consumption, the sales of distilled beverages have slightly increased in 2021 in comparison to 2020 (STAP, 2022). This could potentially be because the Dutch are increasingly opting for higher-quality drinks, especially when it comes to spirits such as rum, gin and whiskey (STAP, 2022).

In recent years, sales of whiskey, rum and gin have increased, but the market share of young jenever on the other hand, has fallen sharply in the Netherlands (SpiritsNL, n.d.). Therefore, despite young jenever it's cultural bonds with the Netherlands, the spirit will be left out of the research. This research will only focus on 4 types of distilled spirits which are vodka, gin, rum, and whiskey. These will be later further divided into several sub-categories according to flavor.

## 1.5 The Research Objective

The objective of this research is to find out what the flavor preferences of the Dutch population are in terms of rum, vodka, gin and whiskey, and how different demographics influence these preferences. More clearly, the consumer attitudes and the buyer behavior of different genders and generations will be studied by means of a questionnaire and will be supported by the expectations and opinions of hospitality entrepreneurs and liquor store owners in interviews. This is meant to help manufacturers and retailers of distilled spirits to focus on developing and promoting a wide range of flavors that cater to the preferences of their target consumers.

The main question that this paper eventually will answer is; **What are the flavor preferences for distilled spirits among different demographic factors of the Dutch population?**

The sub-questions are:

- To what extent is flavor a driver when it comes to buying distilled spirits?
- How do different demographics influence the flavor preferences?
- What are the expectations and opinions of hospitality entrepreneurs and liquor store owners regarding flavor demand for distilled spirits?

## 2. MATERIALS AND METHODS

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The work reported here is meant to identify the preferences of adult consumers regarding flavored distilled spirits. The focus will only be on vodka, rum, gin, and whiskey. This is because of the current distilled spirit trends reported in the Netherlands. As mentioned in the introduction, although young jenever is a Dutch culture related distilled spirit, it has fallen in popularity and demand. Therefore, it will not be included in the research.

In order to answer the main question, primary data was supplemented by searches of peer-reviewed literature, business press, and online databases on global business and trade. Apart from that, 3 sub-questions will be researched by means of qualitative research. Both a questionnaire and an interview have been created. The questionnaire is meant to give answers on sub-question 1 and sub-question 2 and will target all adult consumers in The Netherlands, see table 3 for a clear overview. The interview on the other hand will present findings on the expert level by interviewing liquor store owners and hospitality entrepreneurs.

**Table 3:** Question numbers in relation to sub-questions.

Sub-question	Question number
Identification and relevancy of the respondent.	Survey question 1 - 4
Sub-question 1	Survey question 5 - 10
Sub-question 2	Survey question 11 - 16
Sub-question 3	Interview question 1 - 7

### 2.1 Questionnaire

The questionnaire can be found in Appendix A and the sub-questions relevant to it are sub-question 1 and 2. The questionnaire will be distributed through different channels such as social media platforms, University contacts, and personal contacts. For the questionnaire to be as representative as possible, more respondents will be gained by using SurveySwap and SurveyCircle, platforms that help to connect with other students and researchers who also need respondents (SurveySwap, n.d.). Table 4 gives a clear overview of all channels used to gain respondents. It must be noted that social media platform LinkedIn will be used too. On this platform the author has 2000+ connections in the alcohol industry, and this way a representative sample frame is aimed to be reached.

The questionnaire will be in both English and Dutch, and the Google forms will be used to create it.

**Table 4:** Overview of distribution channels and expected number of respondents

Channel	Expected respondents
Social media	100
Family contacts	50
University contacts	50
Survey Swap	200

### **Validity & reliability**

In order to support the validity of the questionnaire, only participants that live in the Netherlands and consume alcohol will be taken into consideration. Also, participants that drink alcohol only once a year will be eliminated. Questions 1-4 in Appendix A are therefore meant to establish the respondent's identity and relevancy for the research. Each respondent answering that he or she doesn't drink or doesn't live in The Netherlands, will be thanked for their time and the questionnaire will be ended. For clarity, all participants will be informed that the distilled spirits in this questionnaire include rum, vodka, whiskey, and gin at the beginning of the questionnaire. This will be repeated along the questions of the questionnaire.

The Dutch population currently counts nearly 18 million people (Statistics Netherlands). Therefore, to get a reliable result the aim is to obtain at least 385 respondents and expect a 5% margin of error (XM BLOG, 2023). It is therefore expected that around 19 of the respondents will turnout irrelevant for the research and will be therefore not taken into consideration. The respondent is relevant to the research when the person is a current habitant of the Netherlands and does consume alcohol at least occasionally. To support the reliability of the questionnaire even more, mostly closed questions will be asked.

### **Sub-question 1: To what extent is flavor a driver when it comes to buying distilled spirits?**

This question focuses on the natural flavors of distilled spirits, such as unflavored vodka, and the relevance of the addition flavors, such as the addition of a peach flavor to a vodka. It is meant to find out if the respondent would prefer flavored spirits rather than unflavored spirits, under what conditions, and what the responded currently buys more often. The survey questions relevant to this sub-question are questions 5 to 10.

### **Sub-question 2: How do different demographics influence the flavor preferences?**

This question takes a closer look at the preferences within the flavored distilled spirits category. It is meant to find out what category is most preferred by the respondents, and which category is the least preferred by the respondents. The respondents will be asked for their preferences in different situations such as their preference when drinking the distilled spirit pure and their preference when mixing their distilled spirit in a drink. This way spirit producers in the Netherlands could have a better understanding of what factors to focus on when developing new products for their target groups, and what to avoid. The survey questions relevant to this question are questions 11 to 16.



### Statistical test

It is important to measure the relationships between the demographics of the respondents and their flavor preferences to answer the main question. The demographics in this research consist of the gender and the generation. In order to find out whether or not there is a relationship between the demographics and flavor preference (Sirisilla, 2023), a Chi-square test has been chosen to show the relationship between the two variables. A research hypothesis has been created and aims to support sub-question 2 statistically well.

The hypothesis is

**Null Hypothesis(H0)** - Demographics (gender/generation) have no influence on consumers' flavor preferences for vodka.

**Alternative Hypothesis(H1)** - Demographics (gender/generation) have a significant influence on consumers' flavor preferences for vodka.

## 2.2 The Interview

The interview is meant to give answers to sub-question 3 and will be personally face-to-face executed. The interviews are aimed to capture valuable insights on expert level into various aspects of flavored distilled spirits, including consumer preferences, perceptions, and purchasing behavior. This way the market is analyzed on both the consumer level and the expert level. The orientations, knowledge, and assessments of the professional can help to support the answer of the main research question.

### **Sub-question 3: What are the expectations and opinions of hospitality entrepreneurs and liquor store owners regarding flavor demand for distilled spirits?**

This sub-question focusses on the sellers of distilled spirits rather than the consumers of it. Hospitality entrepreneurs such as owners of high pace restaurants, cafés and bars will be interviewed in order to examine their opinions and expectations regarding the demand for flavored distilled spirits. It's important to note that the establishments must sell the following distilled spirits: rum, vodka, gin, and whiskey. Apart from hospitality entrepreneurs and managers, liquor store owners will be interviewed with the same questions too. Table 5 shows an overview of how the establishments will be contacted. All establishments will first be contacted through e-mail and if there is no response a call by phone will be conducted for more effective contact. The next steps will be planning the interview and taking the interview. Lastly, each person that has been interviewed will be send an e-mail thanking them for their time together with a PDF summarizing their answers.

A list of the interview questions can be found in Appendix B. The objective of the interview is to get a point of view from the expert's side rather than the consumers side, and to check whether the expectations of the sellers are in line with the preferences of the questionnaire respondents.

Around 7 to 10 interviews will be done depending on the contacted person its responsiveness, and the time available.

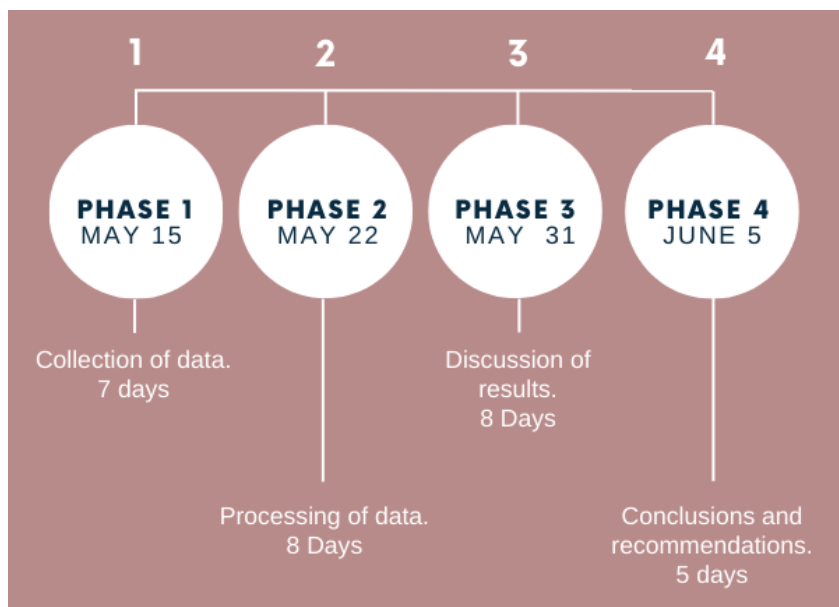
**Table 5:** Contact process for the interview.

Action 1	Action 2	Action 3	Action 4
1. Send introduction e-mail 2. Call by phone	Schedule interview appointment	Take interview	Send 'thank you e-mail' with summary of answers.

## 2.3 Timeline

Figure 1 provides a clear overview of how the research will be done overtime. The start of the research is planned to start in the middle of May 2023. The collection of data for both the questionnaire and the interview will be given 7 days and will start on the 15<sup>th</sup> of May. Phase 2 consists of processing the results into figures, tables, clear explanation, and conducting the statistical test. This phase will last 8 days. Phase 3 consist of the discussion of results, which also will last 8 days. And lastly, phase 4 the conclusions and recommendations in which the main and sub-questions will be answered, will be given 5 days to round up.

**Figure 1:** Timeline of research.



### 3. RESULTS

This chapter will focus on the results found in this study. The results of the questionnaire and the interview are illustrated by means of graphs, tables, and a statistical test. The statistical test aims to support the formation of the conclusion for sub-question 2.

The questionnaire has been active from May 18<sup>th</sup> till the first of June. The interviews have been taken in the same time frame. The questionnaire was administered to a diverse group of 191 respondents, only 167 of those are useful for this particular research and therefore 24 respondents have been rejected. A respondent has been considered useful when the individual lives in the Netherlands and consumes distilled spirits at least occasionally. Respondents that have participated in the questionnaire through Surveycircle.com have agreed that the average time to complete the questionnaire was 4 minutes.

It is important to note that due to the gender and generation imbalance, most tables and figures are displayed in number of respondents, rather than percentages.

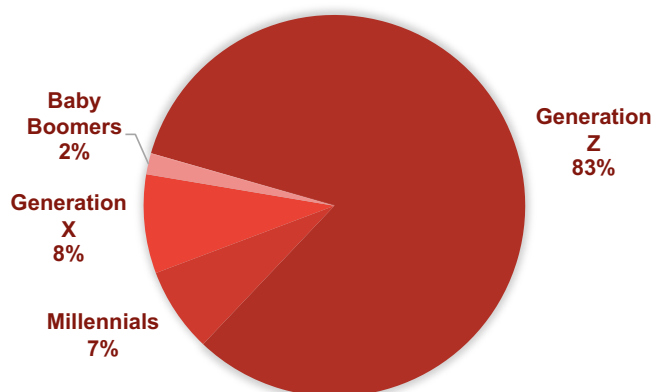
In this study, the group of useful respondents counted 167 respondents, comprising 101 females, 62 males, and 4 individuals who identified as a gender that has been not listed in the answer section.

**Table 6:** Gender distribution across useful questionnaire respondents.

	Male	Female	Prefer not to say	Not Listed
<b>Number of respondents</b>	62	101	0	4
<b>Percentage of total</b>	37,1%	60,5%	0%	2,4%

As displayed in figure 2, most of the respondents identified to be Generation Z (18-26 years), this generation accounts for 82,6% of the total amount of respondents. 7,2% of the respondents are Millennials (27-42 years), 8,4% is Generation X (43-58 years), and 1,8% of the respondents are Baby Boomers (59-80 years). 0 respondents have identified to be 80+ and therefore the generation 'the silent generation' will be excluded from the research from now on.

**Figure 2:** Generations of respondents

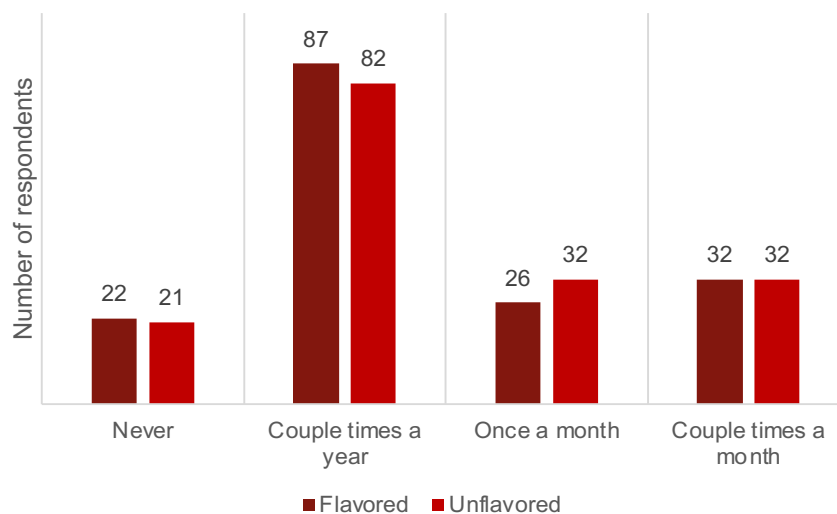


### 3.1 To what extent is flavor a driver?

Following the questionnaire's general opening questions, questions 5-10 gathered information regarding sub-question 1.

First consumers were asked how often they buy flavored and unflavored spirits. As can be seen in figure 3, unflavored and flavored spirits score similar in all cases. Majority of respondents buy flavored and unflavored distilled spirits a couple times a year. The lowest number of respondents indicated never purchasing either flavored or unflavored distilled spirits.

**Figure 3:** Frequency of buying flavored/unflavored distilled spirits.

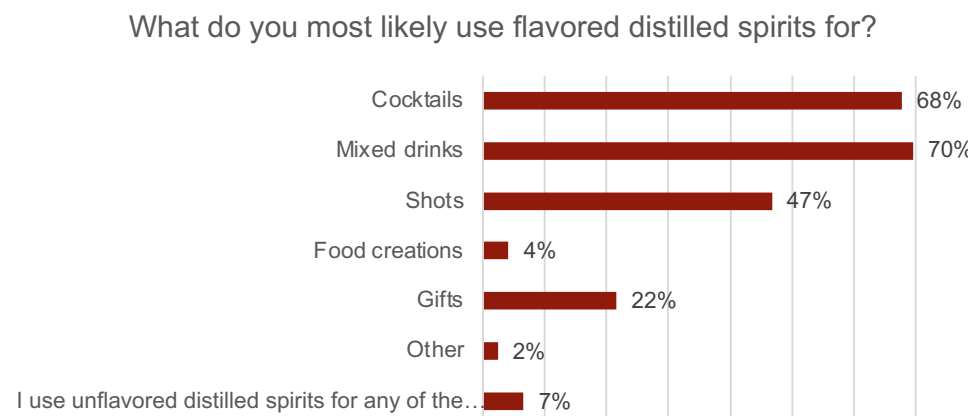


Next, respondents were asked whether they agree or disagree with the statement '*adding flavors to distilled spirits makes them taste better.*'

84,4% of the respondents has agreed with that statement and 15,6% has disagreed. Once again, a total 167 respondents have participated in this question.

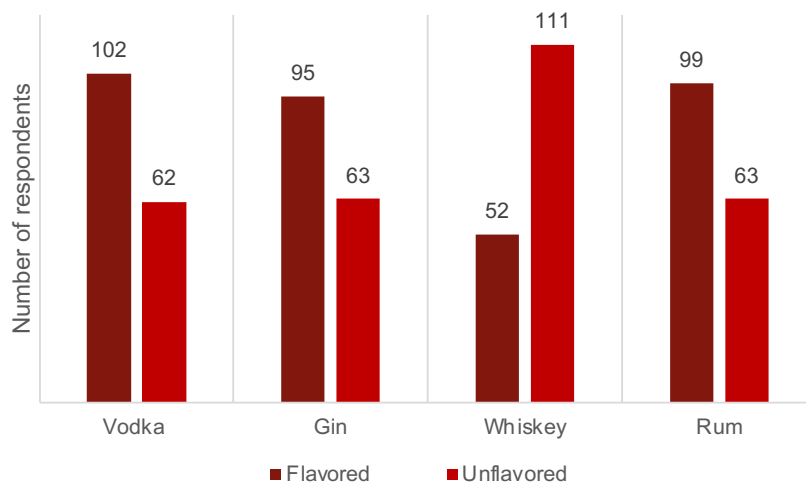
Questionnaire question 7 takes a closer look at the utility of flavored distilled spirits according to consumers. As illustrated in figure 4, most of the respondents uses flavored distilled spirits for mixed drinks and cocktails. 7% of the respondents has answered not to use flavored distilled spirits for any of the possible uses stated but would use unflavored distilled spirits instead. This question was a multiple-choice question, meaning that each respondent got to choose one or more uses of distilled spirits.

**Figure 4:** Utility of flavored distilled spirits according to consumers.



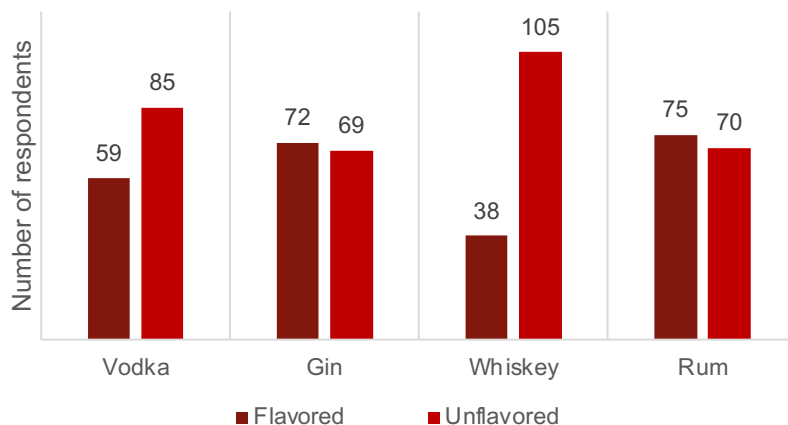
Question 8 of the questionnaire focused on the consumption of flavored and unflavored distilled spirits when pure. As can be seen in figure 5, it was observed that a majority of respondents preferred flavored distilled spirits when consumed pure, except for whiskey. Unflavored whiskey emerged as the most preferred distilled spirit when consumed in its pure form, with 111 out of 167 respondents selecting it as their preference. The most preferred flavored distilled spirit has occurred to be vodka with 102 out of 167 respondents, followed by rum and then gin.

**Figure 5:** Respondent's preference when drinking distilled spirits pure.



Questionnaire question number 9 is similar to question 8 and differs in the way of consumption, which is consumption when mixed in a drink. Figure 6 demonstrates which distilled spirits are rather consumed flavored, or rather consumed unflavored, when the distilled spirit is mixed in a drink. Unflavored whiskey has again scored the highest with a ratio of 105 out of 167 respondents stating to rather drink it unflavored when consumed in a mixed drink. Flavored vodka on the other hand has this time scored lower than unflavored vodka meaning that the majority of the respondents rather consume vodka unflavored when mixing it in a drink. When it comes to rum and gin, both flavored and unflavored have scored similar with just a small majority of respondents choosing to rather consume these spirits flavored when mixed in a drink.

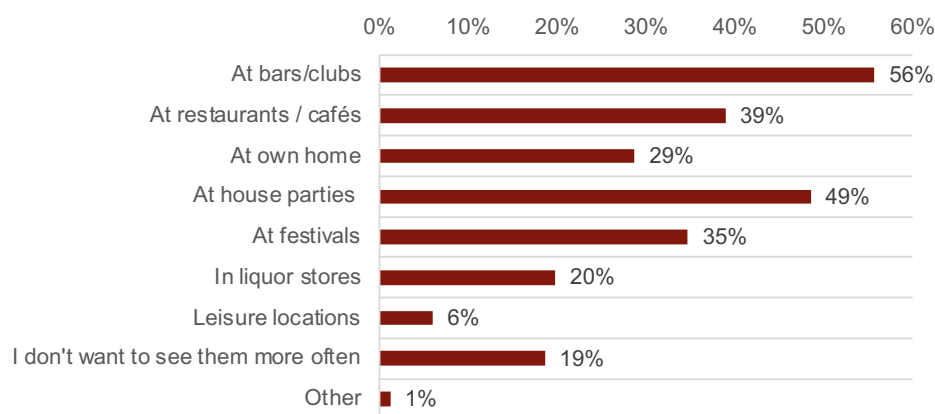
**Figure 6:** Respondent's preference when drinking distilled spirits in a mixed drink.



In the following section the results of question 10 are presented. Figure 7 demonstrates the findings of the question regarding the availability of flavored distilled spirits. The question sought insights into the desired locations where individuals would like to see flavored distilled spirits offered more frequently. The majority of respondents, accounting for 56%, expressed a desire to see flavored distilled spirits more often in bars or clubs. Interestingly, 19% of the participants expressed that they do not wish to see flavored distilled spirits more frequently in any specific location. This response suggests a contentment with the current availability and a lack of desire for greater exposure to these beverages.

A negligible proportion of 1% (2 respondents) has selected 'other' and therefore provided responses that did not align with the predefined options. These open-ended responses have included unique and unconventional locations where individuals would like to see flavored distilled spirits offered more frequently. The 2 respondents that have clicked on 'other' have written down the following answers: 'Other: I see them everywhere already', and 'Other: Church.'

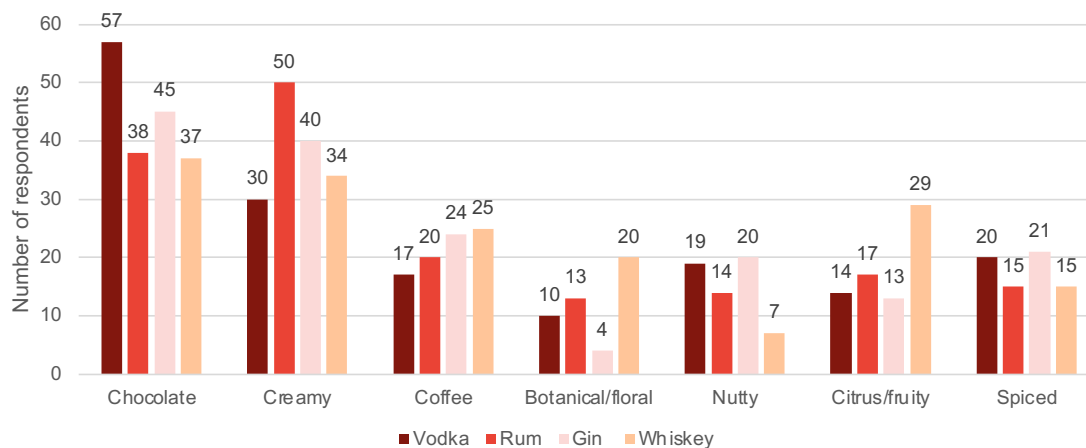
**Figure 7:** Participants' preferences regarding the availability of flavored distilled spirits.



### 3.2 How do different demographics influence the flavor preferences?

Questionnaire questions 11 to 15 are relevant to sub-question 2 and aim to provide an answer on if demographics have an impact on the flavor choice of the consumer. First, respondents were asked about the flavor category that they prefer the least according to each distilled spirit type. The overall answers from all genders can be seen in figure 8.

**Figure 8:** Flavor categories that are least preferred according to each distilled spirit.



As can be seen, flavor categories chocolate and creamy have occurred to be the least preferred by most of the respondents. In case of vodka 57 respondents, accounting for 34% of the total respondents, have selected chocolate as their least preferred flavor category. When it comes to rum, 50 respondents have selected creamy flavors being the least preferred when consuming rum, making this the least preferred flavor category in case of rum. This accounts for 30% of the questionnaire's total respondents. For both gin and whiskey, the chocolate flavor category has occurred to be the least preferred by the respondents with 27% of the respondents least preferring chocolate flavors in gin and 22% of the respondents least preferring chocolate flavors in whiskey.

In order to analyze whether gender had an influence on the flavor category choice, a table displaying each type of distilled spirit and the flavor category choice of each gender has been made. In table 7 can be seen that the flavor categories 'chocolate' and 'creamy' scored the highest in all distilled spirit types for all genders. There is one exception made in distilled spirit type whiskey where more females have identified to less prefer flavor category 'citrus/fruity' rather than flavor category 'chocolate'.

**Table 7:** Least preferred flavor category according to gender in numbers of respondents.

Vodka		Male	Female	Other
	Chocolate	25	30	3
	Creamy	12	17	1
	Coffee	5	11	
	Botanical/floral	5	5	
	Nutty	7	12	
	Citrus/fruity	4	10	
	Spiced	4	16	
Rum	Chocolate	17	19	2
	Creamy	24	25	1
	Coffee	3	17	
	Botanical/floral	2	11	
	Nutty	4	10	
	Citrus/fruity	6	10	1
	Spiced	6	9	
Gin	Chocolate	19	22	4
	Creamy	17	23	
	Coffee	9	15	
	Botanical/floral	1	3	
	Nutty	5	15	
	Citrus/fruity	3	10	
	Spiced	8	13	
Whiskey	Chocolate	17	18	2
	Creamy	13	21	
	Coffee	12	13	
	Botanical/floral	3	17	
	Nutty	5	2	
	Citrus/fruity	7	20	2
	Spiced	5	10	



### Statistical test

A Chi-square test was used to evaluate whether there is significant relationship between the least preferred flavor category and the gender of the respondent. Using a significance level of  $\alpha = 0.05$ , the Chi-square test was performed. The null hypothesis (H0) assumes that demographics (gender) have no influence on flavor preferences, while the alternative hypothesis (H1) suggests that there is a significant influence.

In all cases there is no statistically significant evidence to suggest that gender plays a significant role in determining consumers' flavor preferences for vodka, rum, gin, and whiskey. The tests have failed to reject the null hypothesis (H0), meaning that there is insufficient evidence to conclude that gender has a significant influence on consumers' flavor preferences for vodka, based on the given survey data.

In case of vodka, the chi-square test statistic value obtained was 9.677, and the p-value was 0.644. For rum, the test value (15.612) and the p-value (.210) are obtained from the analysis. When the test was done for the results of gin, the test value obtained from the analysis was 15.678, and the corresponding p-value was 0.206. And lastly the test for whiskey yielded a test value of 18.856 and a p-value of 0.092.

In questionnaire questions 12 to 15 respondents were asked to give their flavor category preference for each type of distilled spirit. Respondents were only allowed to choose one category they preferred the most for each type of distilled spirit. The general results of these questions can be found summarized in table 8. Since there were 0 participants identifying to be the 'Silent Generation' (80+), this generation has been excluded from the research.

As can be seen in table 8, the flavored category 'Citrus /Fruity' has occurred to be the most preferred flavor for almost all types of distilled spirits (with exception for whiskey) according to generation Z. Flavor category 'Unflavored' has been the most preferred flavor for whiskey according to all generations in this research. Taking a closer look at the distilled spirit rum, this distilled spirit is preferred flavorless according to most generations, except for generation Z who prefers it to be citrus /fruity flavored.

Distilled spirit gin has occurred to be preferred when it is citrus /fruity flavored by most of the generations, except for the oldest generation, the Baby Boomers, who prefer it to be botanical/floral.

A clear and detailed overview of the results of questionnaire questions 11-15 can be found displayed as tables 9,10,11 and 12 in Appendix D.

**Table 8:** Most preferred flavor category across generations.

	Generation Z	Millennials	Generation X	Baby Boomers
Vodka	Citrus /Fruity	Citrus /Fruity	Unflavored	Unflavored
Rum	Citrus /Fruity	Unflavored	Unflavored	Unflavored
Gin	Citrus /Fruity	Citrus /Fruity	Citrus /Fruity	Botanical / floral
Whiskey	Unflavored	Unflavored	Unflavored	Unflavored
Number of respondents per generation	137 Respondents	13 Respondents	14 Respondents	3 Respondents

### Statistical test

Using a significance level of  $\alpha = 0.05$ , another 4 statistical tests have been conducted to test the influence of demographics (generation) on flavor preferences. In case of vodka, the test value obtained from the analysis was 44.558, and the corresponding p-value was 0.002.

Therefore, based on the analysis, there is evidence to suggest that generation has a significant influence on flavor preferences among the respondents in your survey.

In case of rum, the test value obtained from the analysis was 28.690, and the corresponding p-value was 0.122, meaning that there is not sufficient evidence to suggest that generation has a significant influence on flavor preferences among the respondents. The same accounts for gin where the p-value .795 is and test value 15.534.

When it comes to whiskey, with a p-value of .013 and a test value of 37.933, there is evidence to suggest that generation has a significant influence on flavor preferences among the respondents.

### 3.3 Interview results

The qualitative research consisted of the interviews. The initial goal was to hold 7 to 10 interviews. A total of 7 interviews was held, of which 6 were face-to-face and 1 through LinkedIn due to the time frame and saturation point. The interviews have been recorded and taken in native language (Dutch). English translated transcripts of the interview can be found in Appendix C. First the results of the 4 liquor store owners will be analyzed, after which the answers of the hospitality entrepreneurs will be explained.

#### 3.3.1 Interviewees: liquor store owners

The first question was meant to identify the enterprise relevant to the interview. A total of 4 liquor stores have been visited in 2 different provinces in the Netherlands.

The second question aimed to determine the ratio of demand for flavored and unflavored spirits. 2 of the 4 liquor store owners have stated that the ratio at their store is 50/50, meaning that the demand for flavored spirits is the same as for the unflavored spirits. One liquor store owner has stated that the demand for flavored spirits at his enterprise is low and that he would describe the ratio as 30/70. Another liquor store owner has not given a specific ratio but has given a more in-depth explanation per distilled spirit. According to this liquor store owner demand for flavor depends on the type of distilled spirit, like in his case flavored vodka being demanded the most at his enterprise.

Regarding the increasing interest in flavored distilled spirits, the majority of liquor store owners acknowledged a growing trend, particularly driven by the popularity of cocktails. Flavored vodka and rum were specifically mentioned as experiencing high demand, and one owner noted that the trend started with gin and expanded to other spirits. Younger consumers, in particular, were identified as showing a significant interest in flavored spirits.

The fourth interview question was about the interviewee's opinion on the potential increase in interest and demand for flavored distilled spirits in the Netherlands in the coming years.

Overall, the opinions of the liquor store owners are divided. While some express optimism about the potential growth of flavored distilled spirits, particularly in the context of whiskey, others are more cautious or skeptical, citing market saturation and the need for exceptional products to drive increased interest and demand. The interviewee's who do think that flavored distilled spirits will gain more interest, see potential for growth in flavored whiskey. They suggest that experimenting with flavored whiskeys could lead to a breakthrough due to the spirit's popularity in the Netherlands. Another opinion that the interviewee's had in common is that vodka may have reached its maximum potential for flavored options.

Expectations regarding the rise in demand for flavored distilled spirits at specific enterprises varied among the liquor store owners. While some anticipated an increase, others expressed uncertainty or believed that demand would remain consistent. 2 of the 4 liquor store owners seem to see the potential for an uptick in demand, and the other 2 are unsure about the expected rise in demand but hope for the best.

Interview question 6 and 7 were about the flavor category with the most potential according to the interviewees, and the flavor category that they have sold the most. Overall, the liquor store owners generally agree that the fruity flavor category has the most potential in terms of popularity and consumer interest. While there may be some variations depending on the specific distilled spirit, fruity flavors consistently attract customers and are expected to continue doing so. This flavor category was also reported to be the top-selling option. Lastly, the liquor store owners have been asked about their general opinion on flavored distilled spirits. The objective of was to question to receive any extra relevant information on the topic. The opinions of the liquor store owners are mixed. While some view flavored spirits as a positive trend with potential for growth, others see it as a relatively weaker trend and compare the trend to the trend of flavored vapes. The perception of flavored spirits varies across different types of spirits, with vodka often seen as having the most potential for flavor experimentation as it is flavorless of itself.

### 3.3.2 Interviewees: hospitality entrepreneurs

Next the answers of the 3 hospitality entrepreneurs are summarized. It has occurred that at hospitality enterprises primarily unflavored spirits are being offered, with only a few flavored options used for, for example, cocktails.

When the interviewees were asked about their perception of increasing interest in flavored distilled spirits among people The responses indicated a mixed perspective, with some interviewees believing in the growing demand for flavored options, while others expressed uncertainty or noted the cyclical nature of consumer preferences. One interviewee referred to past trends such as the popularity of flavored vodka after the vodka craze in the 1980s, followed by flavored rum during the rum revival. The historical pattern suggests a recurring interest in flavored options within the distilled spirits industry according to the interviewee. Next, the interviewees belief regarding the potential increase in interest and demand for flavored distilled spirits in the Netherlands in the upcoming years was examined. While one interviewee expressed skepticism about significant growth in their own establishment, others acknowledged the current interest in flavored options and the likelihood of further interest in the future.

Also, the interviewee's belief regarding the potential increase in interest and demand for flavored distilled spirits at the interviewee's specific enterprise was examined. While one interviewee acknowledged a previous increase in demand, the interviewee did not expect any further increase. Another interviewee indicated a focus on beer rather than flavored spirits at the interviewee's enterprise, and the third interviewee did not express any specific expectations.

Interview questions 6 and 7 examined the opinions regarding the flavor categories with the most potential and the ones that have sold the most in the past at the specific enterprise. The responses highlight the enduring popularity of fruity flavors, with a specific mention of botanical flavors for gin.

## 4. DISCUSSION

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The main objective of this thesis was to find out the distilled spirits flavor preferences of the Dutch population and the influences of demographics (gender and generation). This has been done by conducting quantitative and qualitative research that helps to answer sub-question 1 to 3. The quantitative research provided results to answers the following sub-questions: (1) to what extent is flavor a driver when it comes to buying distilled spirits? And (2) how do different demographics influence the flavor preferences? The findings have shown that the respondents only consume flavored distilled spirits under certain circumstances and in certain locations. A significant part of these respondents has also identified to only consume unflavored distilled spirits under any of the circumstances. When it comes to demographics it has appeared that gender almost doesn't have a influence on the flavor preferences of the respondents, but generation on the other hand does have influence in some cases.

The qualitative research discusses the results given by the various experts answering sub-question 3: what are the expectations and opinions of hospitality entrepreneurs and liquor store owners regarding flavor demand for distilled spirits? It has turned out that the answers of the hospitality entrepreneurs have occurred to be less reliable and therefore valuable.

This chapter will start by discussing the limitations of the methodology used to warn how the results can be interpreted.

### 4.1 Discussion of Methodology

This part of the chapter will give a critical reflection of the research methods used. The methodology employed in this thesis involved a combination of quantitative and qualitative research techniques to address the main research question. Both did not go as planned. The questionnaire yielded less respondents than expected, while the interviews came with unexpected difficulties. A total of 191 respondents completed the questionnaire, out of which 167 were considered relevant for the study. Although efforts were made to obtain a diverse representation of generations, a majority of the respondents belonged to a particular generation, with only three respondents identifying themselves as 'baby boomers'. This generational imbalance may pose limitations in terms of generalizability and comprehensive understanding of the research topic. The statistical analysis was part of the research, and the use of the chi-square test was appropriate to determine the association or independence between categorical variables. Unfortunately, there was not sufficient evidence to suggest that generation has a significant influence on flavor preferences among the respondents. It must be considered that the results of the chi-square tests could have very much been affected by the 'other' gender with only 4 respondents.

Additionally, seven interviews were conducted to gain a deeper understanding of the market from the expert perspectives. The interviewees consisted of liquor store owners and hospitality enterprise owners. The intention behind including these interviews was to explore the orientations, knowledge, and assessments of professionals, as their perspectives could support the answer to the main research question. When contacting liquor store owners everything went according to plan, but hospitality entrepreneurs on the other hand seemed to have busy schedules, making it harder to take the interview in time, if at all. During the course of the interviews, it became evident that including hospitality enterprise owners as interviewees may not have been the most suitable decision. It was discovered that many hospitality industries had limited assortments of flavored distilled spirits, which hindered their

ability to provide comprehensive and accurate responses to several interview questions. But the lack of flavored distilled spirits in the hospitality industry has been a result on its own. It could be therefore interpreted that the limited availability of flavored distilled spirits in the hospitality industry not only restricted the interviewee's ability to provide comprehensive and accurate responses to the interview questions, but it also signifies a potential gap in the market for these products. This finding highlights the importance of considering the impact of industry practices and product availability when examining consumer preferences in the hospitality industry.

#### 4.2 To what extent is flavor a driver when it comes to buying distilled spirits?

Starting with discussing the results of sub-question 1, the results provided valuable insights into the consumption patterns of distilled spirits among respondents in the Netherlands. One way this sub-question has been researched is by researching the use of flavored distilled spirits. As stated in the results, the majority of the respondents uses flavored distilled spirits for mixed drinks and cocktails, with only a small part of respondents using it for other uses such as food creations and gifts. This could indicate that flavor plays a crucial role in enhancing the drinking experience for a considerable segment of consumers. It must be noted that the results of this question could be influenced by the gender and generation imbalance within the respondent pool. Despite these potential limitations, the results provide valuable insights for industry professionals and marketers in the distilled spirits sector. By recognizing the popularity of flavored distilled spirits for mixed drinks and cocktails, manufacturers and retailers can focus on developing and promoting a wide range of flavors that cater to the preferences of their target consumers. Additionally, these findings highlight the potential for expanding the usage of flavored distilled spirits beyond the realm of mixed drinks, such as in food creations and as gifts, suggesting new avenues for product diversification and marketing campaigns. A notable example that demonstrates the success of such an approach is the case of Finland Vodka Company in 2008 that has been mentioned in chapter 1. Recognizing the opportunity, the company introduced a range of flavored vodkas infused with herb extracts, essences, fruits, fruit juices, and plant distillates, resulting in a substantial 30% surge in the sales of flavored vodkas (Jordão et al., 2015).

Another way in which this sub-question has been researched was by examining the preferences for flavored and unflavored distilled spirits among the respondents in relation to both pure consumption and consumption when mixed in a drink. The findings from questions 8 and 9 revealed interesting insights. Unflavored whiskey emerged as the most preferred distilled spirit when consumed in its pure form, with 111 out of 167 respondents selecting it as their preference. This indicates that consumers tend to appreciate the natural and distinct flavors of whiskey, and they might perceive flavor additives as potentially diminishing its unique characteristics. On the other hand, another majority of respondents expressed a preference for flavored vodka with 102 out of 167 respondents indicating a preference for it. This finding suggests that consumers often enjoy the added flavor profiles that enhance the drinking experience of these spirits when consumed alone. It could also be affected by the fact that vodka is flavorless of itself, according to one of the liquor store owners interviewed in this research. It is worth noting that these preferences may be influenced by factors such as personal taste preferences, cultural background, gender, and generation. When it comes to drinking the distilled spirits when mixed in a drink, unflavored whiskey continued to maintain its popularity, with 105 out of 167 respondents favoring it when mixed in a drink. This

suggests that even when whiskey is incorporated into a mixed beverage, consumers still value its natural flavors and prefer to enjoy its distinct characteristics without additional flavorings.

The findings from question 10 shed light on the desired locations where respondents would like to see flavored distilled spirits offered more frequently. A majority of respondents (56%) expressed a desire to see flavored distilled spirits more often in bars or clubs. This suggests that these social establishments are perceived as suitable venues for enjoying and experiencing a variety of flavored alcoholic beverages. It also indicates a demand for a wider selection of flavored options within these venues, potentially enhancing the overall consumer experience in these establishments. Interestingly, 19% of the participants indicated that they do not wish to see flavored distilled spirits more frequently in any specific location. This response suggests a contentment with the current availability of flavored spirits and a lack of desire for greater exposure to these beverages. These individuals may already have access to a satisfactory range of options or may simply prefer other types of alcoholic beverages within these venues, such as beer according to the one if the interviewed hospitality entrepreneurs in this research. Understanding the factors contributing to this contentment can provide valuable insights for establishments aiming to cater to diverse consumer preferences.

#### 4.3 How do different demographics influence the flavor preferences?

Next, a discussion will be conducted based on the questionnaire results related to sub-question 2. The analysis of flavor preferences among respondents revealed that the flavor categories of chocolate and creamy were consistently identified as the least preferred options across multiple distilled spirit types and all genders, suggesting that gender has no influence on flavor preferences. However, an interesting exception was observed in the case of whiskey, where the 'Citrus/fruity' flavor category was even less preferred than the 'Chocolate' category among females. Note that the flavor category 'Creamy' was still the least preferred in whiskey among females while it was flavor category 'Chocolate' for males. This could suggest that gender has a slight influence on the flavor preference within whiskey. Yet, this finding can be questioned as coincidence due to the gender imbalance and is considered not reliable. 4 chi-square tests aimed to evaluate whether there is a significant association between gender and the least preferred flavor preference. In case of vodka, rum, gin, and whiskey the tests have failed to reject the null hypothesis ( $H_0$ ), indicating that there is insufficient evidence to conclude that gender has a significant influence. While the findings suggest a lack of significant influence, it is important to note that this does not definitively prove the absence of a relationship between gender and flavor preferences. Rather, it implies that further research with a larger and more balanced sample may be necessary to provide more conclusive insights.

The gender imbalance within the sample population may influence the generalizability of the findings and should be considered when interpreting the results.

Questionnaire questions 12 to 15 aimed to assess the very opposite of what has been discussed above. Participants were asked to indicate their most preferred flavor category for each spirit type. This way the relationship between generations and flavor preferences has been examined. It should be noted that the "Silent Generation" (80+) was excluded from the research due to the absence of any participants identifying as such.

Flavor category 'Citrus/Fruity' emerged as the most preferred choice for almost all types of distilled spirits among Generation Z, except for whiskey. Among generation 'Millennials', both flavor categories 'Unflavored' and 'Citrus/Fruity' have been chosen to be the most preferred among the distilled spirit types. When it comes to gin, the 'Citrus/Fruity' flavor



category was predominantly favored by most generations, except for Baby Boomers, who favored the 'Botanical/Floral' flavors. In case of rum, most generations preferred it to be flavorless, except for Generation Z, who showed a preference for the 'Citrus/Fruity' flavors. These findings suggest that both generation and distilled spirit type have an influence on the flavor preferences of the respondents. More specifically, it suggests that the young-age respondents seem to show demand for flavored drinks, just as the young-age population seems to do worldwide, according to Data bridge (2021).

4 chi-square tests have been conducted to further examine these findings and unfortunately for rum and gin, the tests did not provide sufficient evidence to suggest a significant influence of generation on flavor preferences. In contrast, for vodka and whiskey, the statistical analysis revealed a significant influence of generation on the flavor preferences of the respondents. Overall, the findings imply that generation plays a significant role in shaping flavor preferences for certain distilled spirits. It is worth noting that the majority (82.6%) of respondents identified themselves as belonging to Generation Z and the representation of other generational cohorts was relatively smaller. These preferences may be influenced by the generation imbalance which should be considered when interpreting the results. But these findings could also suggest that the younger generation has a significant presence in the consumption of (flavored) distilled spirits, which again overlaps with what has been stated by organization Data Bridge in 2021, that millennials and the young-age population seem to be the driving factor behind the growing demand for flavored drinks.

#### 4.4 What are the expectations and opinions of hospitality entrepreneurs and liquor store owners regarding flavor demand for distilled spirits?

Next the findings of the interviews are discussed. These are meant to provide an answer on sub-question 3: what are the expectations and opinions of hospitality entrepreneurs and liquor store owners regarding flavor demand for distilled spirits?

The most important finding that the interviews have resulted in is that hospitality enterprises don't carry much flavored distilled spirits in their assortment, suggesting that there is a potential gap in the market for these products. Perspectives of the hospitality entrepreneur on increasing interest in flavored spirits were mixed, with some interviewees acknowledging the growing demand, while others expressed uncertainty or noted cyclical consumer preferences. It must be considered that the provided insights of the entrepreneurs have been limited as the enterprises did not have much flavored distilled spirits available. This implies that these results are found less reliable and valuable. This applies for the results of all interview questions that have been asked to hospitality entrepreneurs.

A total of 4 liquor store owners have been interviewed too. While two liquor store owners reported a 50/50 ratio, indicating equal demand for both categories, one owner described the ratio as 30/70, with lower demand for flavored spirits. The remaining owner provided a more detailed explanation, stating that demand for flavor varied depending on the type of spirit, with more demand for flavorless gin and whiskey, and significant demand for flavored vodka. It is important to notice that these finding could have been influenced by a set of factors such as location of the liquor store, the availability of flavored distilled spirits within the store and the size of the store. The finding suggests that there the demand for flavored spirits is almost equal but depending on the type of spirit the demand changes. Also, the majority of liquor store owners acknowledged the flavored distilled spirits to be a growing trend, particularly driven by the popularity of cocktails. Younger consumers were identified as the driving factor for the demand of flavored spirits by one of the interviewees. Once again, this finding very much overlaps with the theory by organization Data Bridge (2021). But, since this only was



identified by one liquor store owner, it must be considered that the finding could have been influenced by external factors such as the location and neighborhood of the liquor store. The fruity flavor category was identified as having the most potential in terms of popularity and consumer interest, with variations depending on the specific spirit. This flavor category was also reported to be the top-selling option. Limitations must be considered when interpreting this finding, such as the availability of other flavor categories in those liquor stores, and cocktails and younger consumers to be a driver behind flavored distilled spirits. It has been previously identified that generations do have a influence on the flavor preferences of distilled spirits overall.

## 5.CONCLUSIONS AND RECOMMENDATIONS

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In recent years various developments in the Netherlands such as the combination of the Dutch responsible drinking pattern, the rising demand for natural flavors in alcoholic drinks, and the growing popularity of distilled spirits have created space for opportunities in the market. This research was written for manufacturers and retailers of distilled spirits world-wide and is meant to help them focus on developing and promoting a wide range of flavors that cater to the preferences of their target consumers in the Netherlands. Helping them in the decision-making process intends to reach new sales peaks among these manufacturers and retailers world-wide. The main objective was to find out the distilled spirits flavor preferences of the Dutch population and the influences of demographics (gender and generation) by conducting quantitative research on the consumer perspective (a questionnaire), and qualitative research on the expert level (an interview).

The main question created with these objectives and goals in mind is; “What are the flavor preferences for distilled spirits among different demographic factors of the Dutch population?”

To answer the main question, the following parts of this chapter will present the most important findings of the research that form the conclusion to the following sub-questions:

- To what extent is flavor a driver when it comes to buying distilled spirits?
- How do different demographics influence the flavor preferences?
- What are the expectations and opinions of hospitality entrepreneurs and liquor store owners regarding flavor demand for distilled spirits?

### 5.1 To what extent is flavor a driver when it comes to buying distilled spirits?

In conclusion, the research findings regarding the extent to which flavor is a driver when it comes to buying distilled spirits provide valuable insights for the distilled spirits industry, marketers, and hospitality establishments. The results indicate that flavor plays a crucial role in enhancing the drinking experience for a significant segment of the respondents. The popularity of flavored distilled spirits for mixed drinks, cocktails, and when drinking pure implies that manufacturers and retailers should focus on developing and promoting a wide range of flavors to cater these uses. It has turned out that beyond the use of flavored distilled spirits for mixed drinks and cocktails, other uses have occurred to be less popular among the respondents. Therefore, one way to answer this sub-question is that when buying distilled spirits, flavor is a driver when it's meant to be used for mixed drinks, cocktails, or pure consumptions with exception for whiskey, which is preferred to be consumed unflavored in all cases. Additionally, like discussed in the previous chapter there is potential for expanding the usage of flavored distilled spirits beyond mixed drinks, such as in food creations and as gifts, presenting opportunities for product diversification and targeted marketing campaigns. Another interesting finding from the research is that the respondents have expressed a desire for more frequent availability of flavored distilled spirits in bars and clubs.

## 5.2 How do different demographics influence the flavor preferences?

The analysis of flavor preferences among different demographics provides valuable insights into the influence of gender and generation on the flavor preferences for distilled spirits. The finding is that gender has no influence on flavor preferences with exception to whiskey. Preferences among genders for vodka, rum, and gin have turned out to be similar. But after discussing this finding in the previous chapter, the exception of whiskey has been considered unreliable and therefore the overall conclusion is that gender has no influence on the flavor preferences for distilled spirits. Although no influence has been established, the flavor categories 'chocolate' and 'creamy' have been preferred the least by all genders and should therefore be avoided when considering new distilled spirit flavors.

When examining the influence of generations on flavor preferences, the findings indicate that the younger generation, particularly Generation Z, tends to show a demand for flavored drinks across various distilled spirit types, with exception to whiskey. The analysis of the results revealed an influence of generation on flavor preferences for most distilled spirit types, except whiskey. The influence of the younger generation, particularly Generation Z, in driving the demand for flavored drinks aligns with trends observed worldwide.

The methodology also involved the use of chi-square tests to examine the influence of gender and generation on flavor preferences. The results showed that there was insufficient information to imply a relationship between the two categorical variables, and therefore gender did not have a significant influence on consumers' flavor preferences for vodka, rum, gin, and whiskey. On the other hand, generation was found to have a significant influence on flavor preferences for vodka and whiskey, while no significant influence was statistically observed for rum and gin.

## 5.3 What are the expectations and opinions of hospitality entrepreneurs and liquor store owners regarding flavor demand for distilled spirits?

The interviews conducted with hospitality entrepreneurs and liquor store owners provide insights into their expectations and opinions regarding the flavor demand for distilled spirits. It has been found out that there is a potential gap in the market for flavored distilled spirits in hospitality establishments, as they generally do not carry a wide range of these products in their assortments. The perspectives of hospitality entrepreneurs on the increasing interest in flavored spirits were mixed, therefore no overall conclusion will be given.

On the other hand, the interviews with liquor store owners revealed varying degrees of demand for flavored spirits. While some owners reported an equal demand for both flavored and flavorless spirits, others mentioned a higher demand for flavorless options. The overall conclusions made for this sub-question are:

- (1) The demand for flavor also varied depending on the type of spirit, with significant demand for flavored vodka.
- (2) Younger consumers and the popularity of cocktails were identified as the driving factor for the demand of flavored spirits.
- (3) The fruity flavor category was identified as having the most potential in terms of popularity and consumer interest.

## 5.4 The main answer

Based on the research findings and conclusions from the sub-questions, it can be concluded that the flavor preferences of the Dutch population for distilled spirits are influenced by generations, with generation Z exhibiting a preference for fruity/citrus flavors, with exception to whiskey. It can also be concluded that whiskey has been preferred unflavored by all generations, but liquor store owners anticipate this to change. Gin has occurred to be preferred by younger generations flavored fruity/citrus flavors and older generations botanical/floral flavors. In case of rum, generations 'Millennials', 'Generation X', and 'Baby Boomer' have turned out to prefer it flavorless. But, Generation Z, the generation that is considered to be the driving factor for the demand of flavored distilled spirits according to the results, prefers rum to be fruity/citrus flavored.

Although gender has occurred not to have an influence on the flavor preferences, creamy and chocolate flavors should in all cases be avoided when creating any new flavored distilled.

## 5.5 Recommendations

It has been found out that there is potential for expanding the usage of flavored distilled spirits beyond mixed drinks, cocktails and pure consumption, such as in food creations and as gifts. This presents opportunities for product diversification and targeted marketing campaigns that can help educate consumers about the various ways to enjoy flavored spirits and encourage trial and purchase. It is recommended for manufactures and retailers explore that opportunity. The research has also shown that there is a desire for more frequent availability of flavored distilled spirits in bars and clubs, while hospitality entrepreneurs have stated not to have such big availability of flavored distilled spirits in their assortments. It is recommended for the hospitality entrepreneurs to explore that market gap for opportunities.

Based on the analysis of flavor preferences among different demographics, it is recommended to cater to the preferences of Generation Z, since this generation has turned out to be the driving factor.

The mixed perspectives of interviewees indicate the need for further research and market analysis to fully understand consumer preferences and trends. Again, it is recommended that hospitality entrepreneurs and liquor store owners consider expanding their availability of flavored distilled spirits, particularly considering the preferences of younger consumers. Additionally, understanding the specific flavor preferences within each spirit category can inform product selection and marketing strategies to better meet consumer expectations in liquor stores.

Overall, it is recommended for distilled spirits manufacturers to focus on expanding their product lines to include a wide range of flavors that cater to consumer preferences. This can involve creating new flavor profiles or experimenting with innovative combinations to offer unique and enticing options to attract a broader consumer base and tap into the demand for flavored spirits.

To further enhance the methodology in future research, it is recommended to strive for a more diverse representation of generations within the sample. Future studies should consider implementing strategies to ensure a more balanced distribution across different generations for a more reliable research outcome. Additionally, greater efforts should be made to identify and engage with hospitality enterprises that have a significant assortment of flavored distilled spirits, or only liquor store owners should be chosen to be interviewed.

Future research should consider implementing the recommendations discussed to enhance the methodology and overcome the identified limitations.

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## APPENDICES

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### Appendix A

**Q1: Do you currently live in The Netherlands?**

- ☐ Yes
- ☐ No

**Q2. How often do you consume distilled spirits? (Gin, rum, vodka, whiskey).**

- ☐ I don't drink alcohol or distilled spirits at all
- ☐ Once a year
- ☐ Occasionally (couple times a year)
- ☐ Couple times a month
- ☐ Every week
- ☐ Couple times a week

**Q3. What gender do you identify as?**

- ☐ Female
- ☐ Male
- ☐ Rather not say
- ☐ Not listed

**Q4. How old are you?**

- ☐ 18-26 years old.
- ☐ 27-42 years old.
- ☐ 43-58 years old.
- ☐ 59-80 years old.
- ☐ 80+ years old.

**Q5: How often do you buy unflavored/flavored distilled spirits? (Gin, rum, vodka, whiskey).****Unflavored distilled spirits**

- ☐ 0 Never
- ☐ 0 Couple times a year
- ☐ 0 Once a month
- ☐ 0 Couple times a month (2-4 times)

**Flavored distilled spirits**

- ☐ 0 Never
- ☐ 0 Couple times a year
- ☐ 0 Once a month
- ☐ 0 Couple times a month (2-4 times)

**Q6: Select if you agree or disagree with the following statement: adding flavors to distilled spirits makes them taste better.**

- ☐ Agree
- ☐ Disagree

**Q7: What do you most likely use flavored distilled spirits for? (Gin, rum, vodka, whiskey).**

- ☐ Cocktails
- ☐ Mixed drinks

- ☐ Shots
- ☐ Food creations
- ☐ Gifts
- ☐ Other....
- ☐ I use unflavored distilled spirits for any of the above, but I don't use flavored distilled spirits

**Q8: Which type of spirits do you rather consume flavored when pure? Which type of sprits do you rather consume unflavored when pure?**

Vodka	<input type="radio"/> Flavored	<input type="radio"/> Unflavored
Rum	<input type="radio"/> Flavored	<input type="radio"/> Unflavored
Gin	<input type="radio"/> Flavored	<input type="radio"/> Unflavored
Whiskey	<input type="radio"/> Flavored	<input type="radio"/> Unflavored

**Q9: Apply which one is applicable to you.**

I'd rather have my drink mixed with a

Vodka.	<input type="radio"/> Flavored	<input type="radio"/> Unflavored
Rum	<input type="radio"/> Flavored	<input type="radio"/> Unflavored
Gin	<input type="radio"/> Flavored	<input type="radio"/> Unflavored
Whiskey	<input type="radio"/> Flavored	<input type="radio"/> Unflavored

**Q10: Where would you like to see flavored distilled spirits more often?**

- ☐ At bars/clubs
- ☐ At restaurants / cafés
- ☐ At own home
- ☐ At house parties (for example birthdays)
- ☐ At festivals
- ☐ In liquor stores
- ☐ Leisure locations (cinema, swimming pools, theaters, etc.)
- ☐ Other... (fill in).
- ☐ I don't want to see them more often

**Q11: Which of the following flavor categories WOULDN'T have your preference? Select the flavor category that applies to you for each of the distilled spirit types.**

	Vodka	Rum	Gin	Whiskey
<b>Chocolate</b> – think of white chocolate, dark chocolate and cacao	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<b>Creamy</b> – think of whipped cream, and ice cream	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<b>Coffee</b> – think of espresso and coffee	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<b>Botanical / floral</b> – think of elderflower, rose, basil, mint	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<b>Nutty</b> – think of different kind of nuts	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<b>Citrus /Fruity</b> – Think of raspberry, pineapple, orange, apple, strawberry, mango, grape, etc.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<b>Spiced</b> – think of vanilla, cinnamon, ginger, lemongrass, chili	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

**Q12: If you would have to choose your favorite flavor category for vodka, which one would it be?**

- ☐ **Chocolate** – think of white chocolate, dark chocolate, and cacao
- ☐ **Creamy**– think of whipped cream, and ice cream.
- ☐ **Coffee** – think of espresso and coffee
- ☐ **Botanical / floral** – think of elderflower, rose, basil, mint
- ☐ **Nutty** – think of different kind of nuts
- ☐ **Citrus /Fruity** – Think of raspberry, pineapple, orange, apple, strawberry, mango, etc.
- ☐ **Spiced** – think of vanilla, cinnamon, ginger, lemongrass, chili
- ☐ **No flavor**

**Q13: If you would have to choose your favorite flavor category for rum which one would it be?**

- ☐ **Chocolate** – think of white chocolate, dark chocolate, and cacao
- ☐ **Creamy**– think of whipped cream and ice cream
- ☐ **Coffee** – think of espresso and coffee
- ☐ **Botanical / floral** – think of elderflower, rose, basil, mint
- ☐ **Nutty** – think of different kind of nuts
- ☐ **Citrus /Fruity** – Think of raspberry, pineapple, orange, apple, strawberry, mango, etc.
- ☐ **Spiced** – think of vanilla, cinnamon, ginger, lemongrass, chili
- ☐ **No flavor**

**Q14: If you would have to choose your favorite flavor category for gin which one would it be?**

- ☐ **Chocolate** – think of white chocolate, dark chocolate, and cacao
- ☐ **Creamy**– think of whipped cream and ice cream
- ☐ **Coffee** – think of espresso and coffee
- ☐ **Botanical / floral** – think of elderflower, rose, basil, mint
- ☐ **Nutty** – think of different kind of nuts
- ☐ **Citrus /Fruity** – Think of raspberry, pineapple, orange, apple, strawberry, mango, etc.
- ☐ **Spiced** – think of vanilla, cinnamon, ginger, lemongrass, chili
- ☐ **No flavor**

**Q15: If you would have to choose your favorite flavor category for whiskey which one would it be?**

- **Chocolate** – think of white chocolate, dark chocolate, and cacao
- **Creamy**– think of whipped cream, and ice cream
- **Coffee** – think of espresso and coffee
- **Botanical / floral** – think of elderflower, rose, basil, mint
- **Nutty** – think of different kind of nuts
- **Citrus /Fruity** – Think of raspberry, pineapple, orange, apple, strawberry, mango, etc.
- **Spiced** – think of vanilla, cinnamon, ginger, lemongrass, chili
- **No flavor**

**Q16: Is there any flavor category that has your preference but was not listed? Please name the type of distilled spirit and the flavor you have in mind.**

.....

## Appendix B

Q1: What type of enterprise do you own?

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Q2: What is the ratio of demand for flavorless spirits rather than flavored distilled spirits at your enterprise?

.....

Q3:

.....

Q4: Do you believe that flavored distilled spirits will gain more interest and increase in demand in the Netherlands during the coming years?

.....

Q5: Do you expect the demand for flavored distilled spirits to rise at your specific enterprise?

.....

Q6: In which flavor category do you see most potential in and why?

.....

Q7: Which flavor category have you sold the most in the past?

.....

Q8: What is your opinion about flavored distilled spirits?

.....

## Appendix C

Translated interviews transcripts in English.

Interview 1: Gall & Gall. 20 May 2023
<p>Speaker 1: What type of enterprise do you own?</p> <p>Speaker 2: A liquor store owner</p> <p>Speaker 1: What is the ratio of demand for flavorless spirits rather than flavored distilled spirits at your enterprise?</p> <p>Speaker 2: I think it's 50/50.</p> <p>Speaker 1: Do you feel like you currently see increasing interest in flavored distilled spirits among people?</p> <p>Speaker 2: I feel like it always has been increasing. Currently it's really the cocktails that create the increasement. There is also a lot of ready to drink cocktails, but also flavored distilled spirits have been used more and more for cocktails. I definitely see an increase. It started before the pandemic with gin, after that rum, it started then but it is definitely a bigger thing now.</p> <p>Speaker 1: Do you believe that flavored distilled spirits will gain more interest and increase in demand in the Netherlands during the coming years?</p> <p>Speaker 2: I do think so. Especially because of the cocktails. Even whiskey is being sold in more flavors.</p> <p>Speaker 1: Do you expect the demand for flavored distilled spirits to rise at your specific enterprise?</p> <p>Speaker 2: Yes, I do think so. But especially in case of vodka. It has always been the sold the most with flavors. It's the one that is growing the most.</p> <p>Speaker 1: In which flavor category do you see most potential in and why?</p> <p>Speaker 2: Fruity, it has always had the most potential. It's the most accessible. Currently passion fruit is very trendy, but that will fade away, I think. The spiced category had never attracted the bigger audience and never will, so I do not see potential in this category.</p> <p>Speaker 1: Which flavor category have you sold the most in the past?</p> <p>Speaker 2: Fruity vodka</p> <p>Speaker 1: What is your opinion about flavored distilled spirits?</p> <p>Speaker 2: I think it's a nice addition, but it can go too far. There is a lot of things you can add yourself to a drink without the spirit already being flavored. I think it's a trend, just like the vapes with the flavors. I do think it is a positive trend because people now do cocktails at home now more. But whiskey will not join the trend very much more. Gin has already had the biggest grow. Rum will always be a part of the trend, and vodka has the most potential because it is flavorless of itself.</p>

## **Interview 2: De Boterlap Harderwijk. 20 May 2023**

Speaker 1: What type of enterprise do you own?

Speaker 2: I own a hospitality location that is both a restaurant, a bar, and has a terrace. On Saturdays our bar opens for the nightlife, and then we are open till 04:00.

Speaker 1: What is the ratio of demand for flavorless spirits rather than flavored distilled spirits at your enterprise?

Speaker 2: I would say people prefer flavored spirits in their drinks but there are more unflavored spirits bought here. On Saturday nights a lot of younger people order Bacardi Lemon with their Cola over a simple 'Baco' and on a sunny day when the guests feel like drinking cocktails, they often prefer to order a flavored gin and tonic over an unflavored simple gin and tonic. But we also have a lot of guests that like the traditional stuff that is unflavored.

Speaker 1: If you would have to explain this in numbers, out of 100, how much would you say flavored distilled spirits would be and how much of the 100 would unflavored distilled spirits be?

Speaker 2: Unflavored 60% and flavored 40%.

Speaker 1: Okay let's go on to the next question. Do you feel like you currently see increasing interest in flavored distilled spirits among people?

Speaker 2: Yes definitely. I think people like to try new things and are curious for what they haven't tried yet. But like I said before, there is a type of guests that still prefers traditional drinks without added flavors.

Speaker 1: Do you believe that flavored distilled spirits will gain more interest and increase in demand in the Netherlands during the coming years?

Speaker 2: The biggest grow already has been there, and there is already a lot on the market. It could be that they gain a bit more interest as a result of the cocktail trend that is going on, but only among people individually and not an enterprises like mine.

Speaker 1: Uh, that answer kind of overlaps with my next question, but I am going to ask it anyway. Do you expect the demand for flavored distilled spirits to rise at your specific enterprise?

Speaker 2: They already did compared to years ago. And like I said earlier, the guests really like the 'rose gin and tonic', the 'Mojito Razz' or the Bacardi Lemon with. But as I am not planning to make any changes in the distilled spirit assortment in the nearby future, there won't be any increase either.

Speaker 1: In which flavor category do you see most potential in and why?

Speaker 2: Fruity flavors always have been popular and still are. It could be that it is because they add sweetness to drinks. But it really depends on the cocktail. In case of our gin tonics, botanical flavors always have been popular.

Speaker 1: And which flavor category have you sold the most in the past?

Speaker 2: I've only had two and choosing from these two it would be fruity flavors.

Speaker 1: What is your opinion about flavored distilled spirits in general?

Speaker 2: I personally prefer unflavored distilled spirits, but I guess that because I am not a big fan of very sweet drinks. I like the way you can be creative with them, but they are not necessary, especially in the hospitality industry. There are already a lot of flavored liquors that can be used for various cocktails after which you just add a splash of unflavored vodka or unflavored rum.

### **Interview 3: Mitra Thiele Zeewolde. 20 May 2023**

Speaker 1: What type of enterprise do you own?

Speaker 2: I am a Mitra franchise location owner

Speaker 1: What is the ratio of demand for flavorless spirits rather than flavored distilled spirits at your enterprise?

Speaker 2: I would say that flavorless spirits are being bought more here. Only vodka and Bacardi are bought flavored a lot. Especially the Bacardi Razz and Bacardi Lemon for example.

Speaker 1: And if you'd have to explain the ratio in percentages where flavored + unflavored is 100?

Speaker 2: I would say it's 30/70.

Speaker 1: Ok. Next question. Do you feel like you currently see increasing interest in flavored distilled spirits among people?

Speaker 2: Among younger people yes. Those are almost always the ones buying flavored vodkas and rums. But it's not necessarily rising, it's just popular. When it comes to flavored gin I see older people really liking it too.

Speaker 1: So, if I understand it correctly, you don't consider interest in flavored spirits rising, you just see there is the same interest during a long period of time? And there are different amounts of interest across generations depending on the type of spirit?

Speaker 2: Yes.

Speaker 1: Ok. Do you believe that flavored distilled spirits will gain more interest and increase in demand in the Netherlands during the coming years?

Speaker 2: I think it could. Vodka has already reached its peak and I don't see much potential for other distilled spirits. If there would be any increase it would be for whiskey. I think whiskey could have a chance for a breakthrough. Whiskey is a very popular distilled spirit in the Netherlands and I personally feel like there could be experimented a lot more with flavored whiskeys.

Speaker 1: Do you expect the demand for flavored distilled spirits to rise at your specific enterprise?

Speaker 2: I hope so haha! I think it could due to trends. Like for example right now with the cocktail trend the vanilla vodka has been quite popular. But I don't expect anything. I do believe that the demand for the flavored vodka's will stay the same.

Speaker 1: In which flavor category do you see most potential in and why?



Speaker 2: For vodka it will always stay fruity. For rum probably too. Gin sometimes has fruity flavors, but also a lot of botanical ones. Whiskey and fruity flavors don't go well together, but in general if I would have to choose one it would be fruity.

Speaker 1: Which flavor category have you sold the most in the past?

Speaker 2: Fruity.

Speaker 1: Does that apply to all 4 types of distilled spirits?

Speaker 2: No, only to vodka and rum. Whiskey is mostly bought unflavored but that's probably because I don't have a lot of flavored whiskey options here. In case of gin there is a wide range of floral gins available, such as rose gin or elderflower gin.

Speaker 1: What is your opinion about flavored distilled spirits?

Speaker 2: It's a nice trend, but not a very strong one. I think that a flavored spirit is a one-time buy compared to an unflavored spirit. This may differ across age groups as I see youth buying the Bacardi Lemon way more often for example.

#### **Interview 4: Gall & gall Amsterdam Noord. 26 May 2023**

Speaker 1: What type of enterprise do you own?

Speaker 2: I am a Gall & Gall liquor store owner. I manage this location.

Speaker 1: What is the ratio of demand for flavorless spirits rather than flavored distilled spirits at your enterprise?

Speaker 2: Flavorless spirits are being bought more when it comes to whiskey rum and gin. Vodka is the most popular when it comes to flavored spirits. But unflavored vodka is also still being bought a lot.

Speaker 1: Do you feel like you currently see increasing interest in flavored distilled spirits among people?

Speaker 2: Yes, not in every distilled spirit category but I feel like some flavored spirits are being used for cocktails a lot.

Speaker 1: Do you feel like this for all 4 types of distilled spirits?

Speaker 2: Not all of them. It's mostly vodka and rum that are being bought flavored. But compared to years before, yes, there is more flavored spirit kinds on the market in general.

Speaker 1: Do you believe that flavored distilled spirits will gain more interest and increase in demand in the Netherlands during the coming years?

Speaker 2: Yes, I do think so. I think other types of distilled spirits will gain more interest and therefore develop new flavors. I think vodka has reached its max and won't develop much more in terms of flavored distilled spirits. Whiskey on the other hand is developing slowly more.

Speaker 1: Do you expect the demand for flavored distilled spirits to rise at your specific enterprise?

Speaker 2: I'm not sure. When people come for flavored spirits, they usually come for a Bacardi Lemon or an Absolut Watermelon vodka for example. I don't think this will change much more very soon.

Speaker 1: In which flavor category do you see most potential in and why?

Speaker 2: Fruity flavors have been trendy for a long time now, I don't think this will change. Except for whiskey of course. Whiskey is getting more and more attention when it comes to spiced flavors.

Speaker 1: Which flavor category have you sold the most in the past?

Speaker 2: Fruity flavors. But this only applies for vodka and rum. Otherwise, unflavored spirits have sold the most in general.

Speaker 1: What is your opinion about flavored distilled spirits?

Speaker 2: I think that the trend will stay for a long time but won't grow very much more. It makes people explore a bit and try new things. There are already many different flavors when it comes to vodka and rum, but I think whiskey has yet to experience the trend.

#### **Interview 5: Rijnbar, Amsterdam. 26 May 2023.**

Speaker 1: What is the type of enterprise you own?

Speaker 2: During the day it's a place where guest can come for either lunch, dinner, or just a drink, but in the evening the place turns into a bar where people come for a beer and socialize with each other.

Speaker 1: What is the ratio of demand for flavorless spirits rather than flavored distilled spirits at your enterprise?

Speaker 2: We only have a couple flavored spirits that we use for some cocktails and there are more unflavored spirits consumed here. I can't really say anything about demand as the guests can only order what we have available.

Speaker 1: What type of distilled spirits that are flavored do you have?

Speaker 2: Gin and rum.

Speaker 1: Do guests sometimes ask for a flavored rum and coke for example.

Speaker 2: Yes, they do. But only the locals that know we have it.

Speaker 1: Do you feel like you currently see increasing interest in flavored distilled spirits among people?

Speaker 2: I'm not sure if it is increasing, it isn't at my establishment at least. But I do see more and more flavored everything in liquor stores. I also keep seeing more cocktails with flavored distilled spirits. So I guess it is a thing.

Speaker 1: Do you feel like you see it more than before the pandemic?

Speaker 2: I think it all started before the pandemic but has been on pause until the pandemic was over. Now I definitely see them more often, but I can remember it started back then.

Speaker 1: Do you believe that flavored distilled spirits will gain more interest and increase in demand in the Netherlands during the coming years?

Speaker 2: I think they already do, people these days mix their drinks with all kinds of flavors like Bacardi Mango or any fruity vodka flavor. But yeah, they could get even more interest.

Speaker 1: Do you expect the demand for flavored distilled spirits to rise at your specific enterprise?

Speaker 2: Not really, it's mostly beer that is being ordered here. During the night a lot of people order mixed drinks with vodka, but I never really hear anything about flavored vodka.

Speaker 1: Ok. And even though you don't serve that much flavored distilled spirits, in which flavor category do you see most potential in?

Speaker 2: Fruity flavors.

Speaker 1: Which flavor category have you sold the most in the past?

Speaker 2: Fruity, it's the only one I have.

Speaker 1: And lastly, what is your opinion about flavored distilled spirits in general?

Speaker 2: I think they are fun to try. Some taste better than the other. But it's nothing for the hospitality industry unless we use them for cocktails.

Speaker 1: Do you think they make drinks taste better?

Speaker 2: For some people they make drinks taste better and for some they don't. But, people usually mix distilled spirits with something that already tastes good.

#### **Interview 6: Slijterij Sneldrank Amsterdam. 27 May 2023**

Speaker 1: What type of enterprise do you own?

Speaker 2: A liquor store.

Speaker 1: What is the ratio of demand for flavorless spirits rather than flavored distilled spirits at your enterprise?

Speaker 2: Uhm it's hard to tell but I think it's 50/50. Sometimes we have periods in which flavored spirits are bought a lot and sometimes we have periods during which unflavored spirits are bought more.

Speaker 1: And do you feel like you currently see increasing interest in flavored distilled spirits among people?

Speaker 2: Yes, the interest has been around for a while now.

Speaker 1: But do you feel like it's more than it was before?

Speaker 2: Yeah, a little bit. During the pandemic the flavored spirits were quite popular and people would drink at home more often. When everything opened up, people started going outside more and distilled spirits in general were bought less here. But now that we are more than a year further, they the demand started increasing again.

Speaker 1: Ok. And do you believe that flavored distilled spirits will gain more interest and increase in demand in the Netherlands during the coming years?

Speaker 2: I don't think so. Unless something new and good pops up on the market that will draw everyone's, attention but there is already so much. And then the question is if it will survive. I've seen a lot of nice products come and go over the years.

Speaker 1: Do you expect the demand for flavored distilled spirits to rise at your specific enterprise?

Speaker 2: I think so yes.

Speaker 1: Why?

Speaker 2: The people that come here are quite young and are the mostly the ones buying the flavored spirits. Therefore, I do see a chance of these spirits getting an increase in demand.

Speaker 1: And in which flavor category do you see most potential in and why? Think in categories like fruity flavors, botanical flavors, or even spiced flavors like vanilla and ginger for example.

Speaker 2: Fruity flavors. Raspberry and lemons are very popular ones. But it really depends on the distilled spirit. Vanilla vodka has been popular for a while too but it's has always been fruity flavors that were constant.

Speaker 1: Ok, then the next question is which flavor category have you sold the most in the past?

Speaker 2: Fruity flavors.

Speaker 1: Would you say this applies to all 4 distilled spirits?

Speaker 2: Most of them yes, I don't. really have gin in many fruity flavors but 'pink gin' has been also really popular among all gins.

Speaker 1: And lastly, what is your opinion about flavored distilled spirits in general?

Speaker 2: I think they are an ok thing. People now have more to choose from. But sometimes there are too many. Many producers start creating new products and new flavors hoping to join the trend but they never sell, so it can get too much.

#### **Interview 7: ISAAC Company. Online. 30 May 2023**

Speaker 1: hat type of enterprise do you own? (Example; liquor store/ restaurant / cocktail bar, etc).

Speaker 2: Bartender Academy / Hospitality Activation, promotion.

Speaker 1: What is the ratio of demand for flavorless spirits rather than flavored distilled spirits at your enterprise? (In particular whiskey, gin, vodka and, rum).

Speaker 2: 85% non-flavored (flavorless is not a correct term, spirits do have flavors, also within the spirit industry you have a flavored spirit category: most known for example Spiced rum, flavored Vodka etc. But also gin is considered to be a flavored spirit)

Speaker 1: Do you feel like you currently see increasing interest in flavored distilled spirits among consumers? (In particular whiskey, gin, vodka and, rum).

Speaker 2: It's a returning demand. After the vodka craze in 1980 you saw flavored vodka. After the rum revival you saw flavored rum, and now you see flavored gin, flavored whiskey, etc. You already see the first commercials of flavored tequilas.

Speaker 1: Do you believe that flavored distilled spirits will gain more interest and increase in demand in the Netherlands during the coming months and even years? (In particular whiskey, gin, vodka and, rum).

Speaker 2: As before, there always will be a demand for flavorings. The trend is premium luxury products and in that segment you see less flavorings. But in the more commercial segment you will see it come and go. In the 1990's you saw 100's of flavored vodka's That has reduced to only the good selling items.

Speaker 1: Do you expect the demand for flavored distilled spirits to rise at your specific enterprise/industry that you are working in? (In particular whiskey, gin, vodka and, rum).

Speaker 2: I don't expect a specific rise in my industry.

Speaker 1: In which flavor category do you see most potential in and why? Does this apply for all distilled spirits? (In particular whiskey, gin, vodka and, rum).

Speaker 2: Spiced. Primarily vanilla, it makes everything taste good and makes it easier to start enjoying a certain category and it attracts a wider target group.

Speaker 1: Which flavor category have you sold/used the most in the past? Does this flavor category apply for all distilled spirits? (In particular whiskey, gin, vodka and, rum).

Speaker 2: Fruity (for vodka gin and rum). Spiced (for rum and whiskey).

Speaker 1: What is your opinion about flavored distilled spirits in general?

Speaker 2: It has a bad cheap reputation where the flavors overpower the base spirit or hide/mask bad flavor. It is very much a commercial and smart move of brands to prolong the popularity of a trending categories and attract a wider group of consumers.

There are a few brands that take a more premium and quality road, for example Union Rum. Basically, a spiced rum but don't want to be associated with the spiced rum category. They call themselves a botanical rum.

A big flavor I miss in the list is honey. To attract a younger consumer, you see products like Jack Honey, etc. So, for me the flavored category is very much a commercial, and not a quality category. Because of that, there will always be a demand for flavored spirits.

## Appendix D

Results of questionnaire questions 11-15, displayed in number of respondents

**Table 9:** Vodka flavor preferences according to different generations.

	Generation Z	Millennials	Generation X	Baby Boomers
Chocolate	2	0	0	0
Creamy	6	0	0	0
Coffee	7	1	2	0
Botanical/floral	21	1	2	0
Nutty	0	1	0	0
Citrus/fruity	83	7	3	0
Spiced	6	0	3	1
Unflavored	12	3	4	2

**Table 10:** Rum flavor preferences according to different generations.

	Generation Z	Millennials	Generation X	Baby Boomers
Chocolate	3	1	1	0
Creamy	11	0	1	0
Coffee	8	1	0	0
Botanical/floral	9	1	2	0
Nutty	6	1	0	0
Citrus/fruity	53	2	3	0
Spiced	36	2	3	1
Unflavored	11	5	4	2

**Table 11:** Gin flavor preferences according to different generations.

	Generation Z	Millennials	Generation X	Baby Boomers
Chocolate	1	0	0	0
Creamy	6	0	0	0
Coffee	2	0	0	0
Botanical/floral	45	3	4	2
Nutty	4	1	0	0
Citrus/fruity	63	5	7	0
Spiced	5	1	0	0
Unflavored	11	3	3	1

**Table 12:** Whiskey flavor preferences according to different generations.

	Generation Z	Millennials	Generation X	Baby Boomers
Chocolate	4	0	0	0
Creamy	8	1	0	0
Coffee	20	0	0	0
Botanical/floral	4	0	0	0
Nutty	23	0	1	0
Citrus/fruity	15	3	0	0
Spiced	24	1	0	0
Unflavored	39	8	13	2