

Liquid

Ideas made
possible.



A spirits & beverage retail report—

Futures.

WHAT'S IN STORE?



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HOW IS THE FUTURE OF SPIRITS SHAPING UP IN AN UNCERTAIN & EVER CHANGING WORLD?

In this report, we explore *how*, the world of beverage and spirits is shifting. Unveiling the reasons *behind* the rise of ‘*No & Low*’, and how brand’s are experimenting to *grow interest* in the drinks sector, building a *new* following of imbibers.



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THE SHIFTING

Beverage landscape

EVOLVING ATTITUDES & LIFESTYLES

We may be drinking *less* — and some *not at all* — but the culture of drinking is far from fading. It is *evolving*. Tomorrow's libation will be defined by *provenance, wellness, immersive experience*, and the *social rituals* that bring people *together*.



A generational shift in attitudes towards drinking is happening.

A Changing Relationship

As Millennials and Gen Z enter their peak social and consumption years, their relationship with alcohol looks markedly different from generations before them. Where previous cohorts leaned into revelry, today’s young adults are reshaping drinking culture around wellness, moderation, and meaning.

According to Gallup, the number of young adults in the U.S. who say they drink alcohol has been falling steadily — from 72% in 2001 to just 62% in 2021, and down further among 18–34-year-olds from 59% in 2023 to 50% in 2025. The decline isn’t explained by a single factor, but by a confluence of cultural and economic drivers.

'We ask what are the reasons behind the shift?'

1 — Wellness First

Self-care has moved from trend to lifestyle. Alcohol increasingly conflicts with how young consumers define “health,” encompassing mental clarity, fitness, sleep, and emotional balance. McKinsey’s Future of Wellness (2025) shows that wellness spending is treated as a non-negotiable priority — even under financial strain. This repositions alcohol less as an everyday staple and more as a conscious choice.

2 — Sober Curiosity & Social Reconnection

Alcohol once served as a default social lubricant. But cascading “permacrises”, pandemic isolation, digital retreat, climate anxiety, have all spurred many to re-evaluate what connection means. Layered onto this, the World Health Organization has stated bluntly: “No level of alcohol consumption is safe for our health.” In response, the rise of NOLO (no-and-low-alcohol) alternatives offer a way to socialize without compromise, fueling a new wave of mindful drinking.

3 — Financial Liquidity

The global cost-of-living crisis is reshaping priorities. Many young adults are delaying traditional milestones like home ownership — according to the Resolution foundation, only ~31% of 25-34-year-olds own homes today compared with ~55% in the early 1990s. With disposable income stretched, alcohol is increasingly seen as a luxury for special occasions rather than an on-trade default.

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“Gen Z doesn’t drink just to drink.
They drink to feel something—to relax,
explore, unwind, or elevate a moment.
They want the ritual, not the rager.”

SOURCE — INBODEGA REPORT

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CONSUMER TRIBES

The new imbibers.

WHO ARE THE TASTE MAKERS
THAT WE NEED TO BE TALKING TO?

SUPPER CLUB



Supper-club socialites.

AT HOME HOSTS & DINNER PARTY DELIGHT

Traditional bars and clubs are losing ground to more intimate, curated gatherings. For Gen-Z and Millennials, connection is best found at **dinner parties, supper clubs, and tasting nights**, experiences designed on their own terms, not dictated by 'trad-venues'.

This tribe thrives on curation and creativity: pairing wines with meals or media, experimenting with cocktails, or hosting themed nights with friends. What was once the privilege of the elite, dinner parties and private dining has re-emerged as an accessible, social luxury. From upscale nights in to community 'living-room restaurants', these gatherings deliver **atmosphere, intimacy, and comfort without the price tag** of nightlife.

The appeal is clear: consumers choose their own music, ambiance, and rituals, creating safe, value-driven spaces that reflect who they are. It's also visible in spending shifts — **26% of U.S. consumers now report spending more on beverages for home consumption** (The Spirits Business). Also, culturally, the momentum is undeniable: **Pinterest searches for "dinner party" surged over 6000% year-on-year**.

In-home hospitality isn't just a trend, it's a creative response to a deeper need for intentional, personal connection. Like a new-age book club, it blends beverages with food, culture, and community redefining how consumers socialize.

As the remaining on-trade environments respond, nightlife spaces are beginning to mimic the warmth of home. Clubs, DJs and even bars are creating **home-away-from-home experiences** in unconventional locations.

To grow affinity with this tribe, create spaces for them to belong, **encourage freedom, creative experimentation and pair drinks with unexpected moments** set at the cross-section of their interests and environments they want to inhabit.

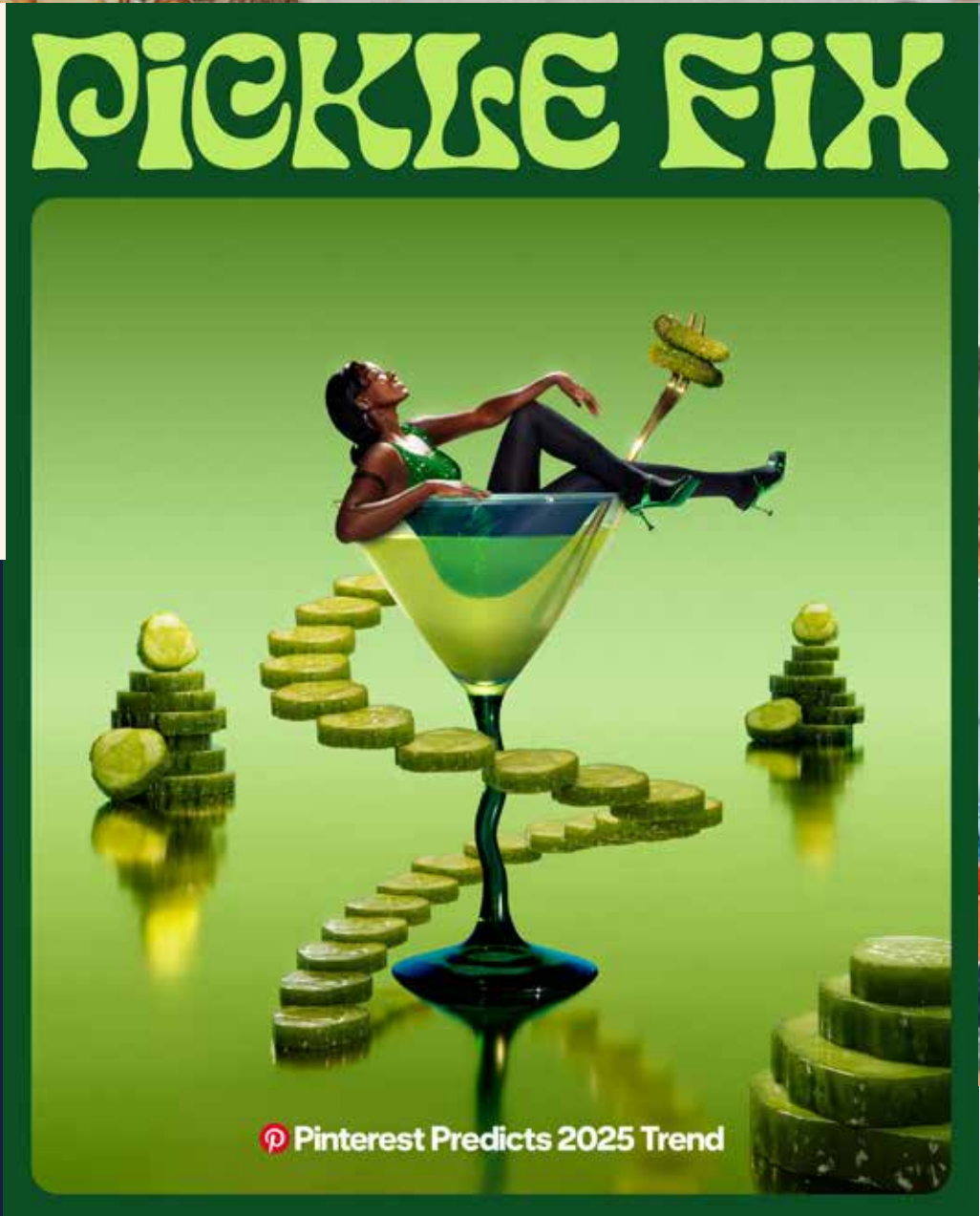
“The future of hospitality is about connection – supper clubs, curated dinners and experiences like Timeleft prove that the industry isn't just about food or service, it's about bringing people together in meaningful ways.”

Aya Tohme, marketing manager, Timeleft

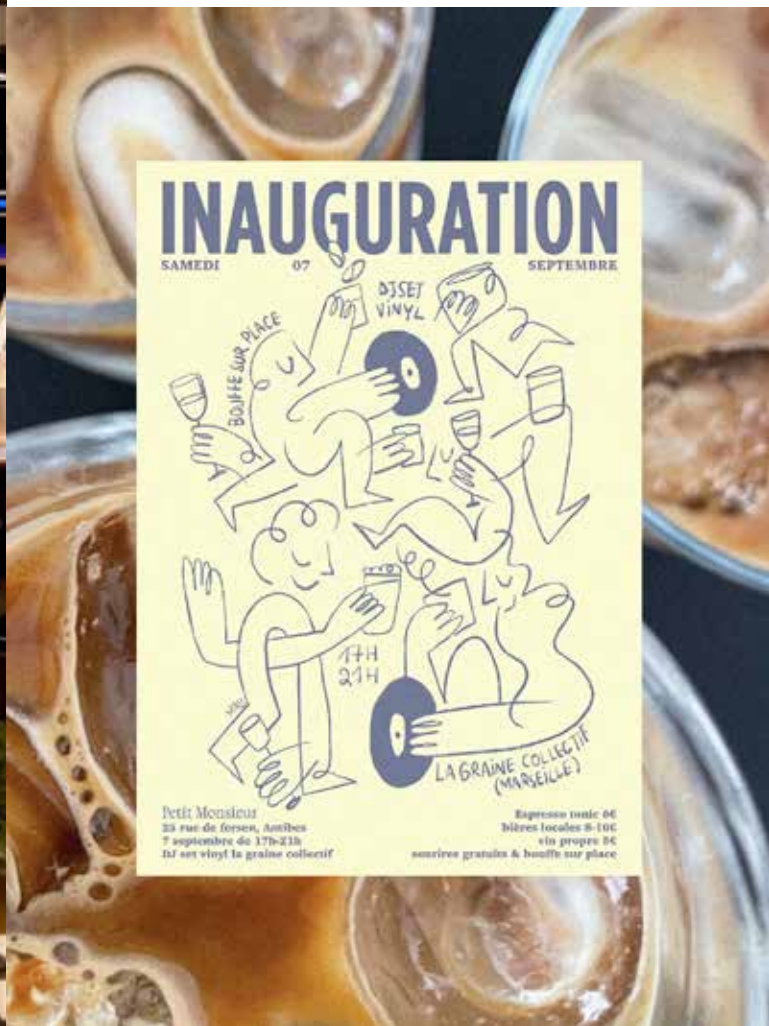
Leeds

EVERY WEDNESDAY
STRANGERS MEET FOR DINNER.

Book your seat now and meet 5 strangers over dinner, all matched by our personality algorithm.



Fillet steak purchases are up 42% year on year at Waitrose.



Coffee shop ravers.

THE UNDERGROUND MUSIC LOVERS GO TOPSIDE.

A new kind of nightlife is brewing — in broad daylight, over lattes and playlists. Coffee shop raves are rising fast, driven by a generation of sober-conscious consumers who want music, community, and joy.

This shift comes at a time when traditional nightlife is under pressure. **Between March 2020 and December 2023, more than 3,000 nightclubs, bars and pubs in London closed permanently** (Night Time Industries Association, Metro UK). For many, this signals not just decline, but a need for reinvention.

Forward-thinking collaborators are already testing the model. House-party collective Lab54 partnered with IKEA UK to transform a coffee shop into a party with DJ Lagoon and drag artist Bimini, extending the concept with pop-ups in a hair salon, kebab shop, and library. **These activations show how everyday spaces can morph into cultural playgrounds.**

For Gen Z and younger Millennials, this scene hits the sweet spot. They come for the music but stay for the moment: a viral snack, the pulse of the rhythm, an Instagrammable drink, and an atmosphere that feels laid-back, safe, and inclusive. **It's nightlife on their own terms, its more intimate than a club, more energising than a bar, and more aligned with values of wellness, creativity, and social connection.**

At its core, the phenomenon reflects a wider trend: third spaces as multi-purpose venues. Coffee shops, salons, bookstores, even gyms are being reimagined as community-led event spaces, dance parties, live podcast tapings, post-yoga DJ sets, or matcha-fuelled morning raves. **For licensed venues and drinks brands, the lesson is clear — lean into these cross-sectional narratives that blur wellness, culture, and pleasure.**

Coffee shop raves aren't a rejection of alcohol altogether, they're a recalibration of context. This demographic values control and choice, sometimes that's a flat white, other times it's a craft cocktail. What matters most is the vibe: **real-life connection, freedom of expression, and a space where health and hedonism can co-exist symbiotically.** When alcohol isn't the focus, it simply becomes a treat, enhancing culture not drowning it out.

“Raves are leaving the club — and entering kitchens, cafés, fashion boutiques, ice cream parlours, and living rooms”

Shamani Joshi, Thenodmag



Tech-ristocrats.

DIGITAL INVESTORS & EXCLUSIVITY CHASERS.

A tribe of new high net worth individuals has emerged as a powerful group of consumers that, through entrepreneurial spirit and crypto-investments, has disrupted the stereotypical definition of what a luxury consumer is. They have different priorities than the luxury old guard, although **time-poor and always-on in terms of lifestyle**, some key aspects still ring true exclusivity, personalization, and access.

Exclusivity remains a cornerstone, but it's no longer just about scarcity, it's about insider knowledge, early drops, or being part of a community that few can enter.

Personalization has evolved beyond monograms to fully tailored experiences, from curated travel to bespoke spirits collaborations that reflect an individual's identity and values.

Access is increasingly the ultimate currency: private previews, behind-the-scenes immersion, and the ability to unlock worlds that feel off-limits to the masses. Together, these pillars define what today's high-net-worth tribe truly seeks: luxury that feels rare, relevant, and resonant.

According to BCG's True-Luxury Global Consumer Insight, **the luxury market is set to reach €1.3 trillion by 2026, with Millennials and Gen Z making up nearly 75% of all buyers.**

What makes this even more significant is the way they're building their wealth. A Stilt dataset shows that **94% of crypto buyers are aged 18-40, the very same demographic now defining luxury.**

Together, these numbers highlight how digital-native generations are not only reshaping the meaning of affluence but also **where and how luxury consumption happens.**

This new tribe of luxury consumers is rewriting the rules. **For them, true luxury is autonomy having what they want, when and how they want it.** They seek brands and experiences that reflect their values and interests, not what others dictate. Collaborations like Loewe x Studio Ghibli show how culture and craft can combine into highly covetable moments.

They are also drawn to rare, carefully curated products — limited-edition whiskeys, and exclusive collabs, **where scarcity and ceremony turn consumption into meaningful experience.** As said by Daniel Langer for Jing Daily, "scarcity is the thrill of being in the know, the satisfaction of participating in a collective moment, and the anticipation of what comes next."

“A luxury is no longer a possession, but a practice: of care, of consciousness, and of choosing how to spend our time with purpose.”

—Time as Luxury: Walpole British Luxury Summit 2025.

NOLO & the sober curious.

NOT INTO DRINKING, BUT LOOKING FOR CRAFT.

With the rise in sober and t-totallers, some say that alcohol has had its hayday. It is a fact that with the coming of age of each new generation, we are drinking less and less, but even the non-drinkers are interested in spirits still. Consumers of all ages choosing to moderate their alcohol consumption or quit entirely: **"30% of US consumers are actively reducing their alcohol intake"**.

From extravagant water brands to alcohol free liquors and mocktail culture, there is still a place for alcohol brand custodians to create relevant products for this growing sect of society. **The hook in is the craft, the flavour and richness of the brandworld** — to some alcohol may be unnecessary, but **flavour and enjoyment are still universal imperatives**.

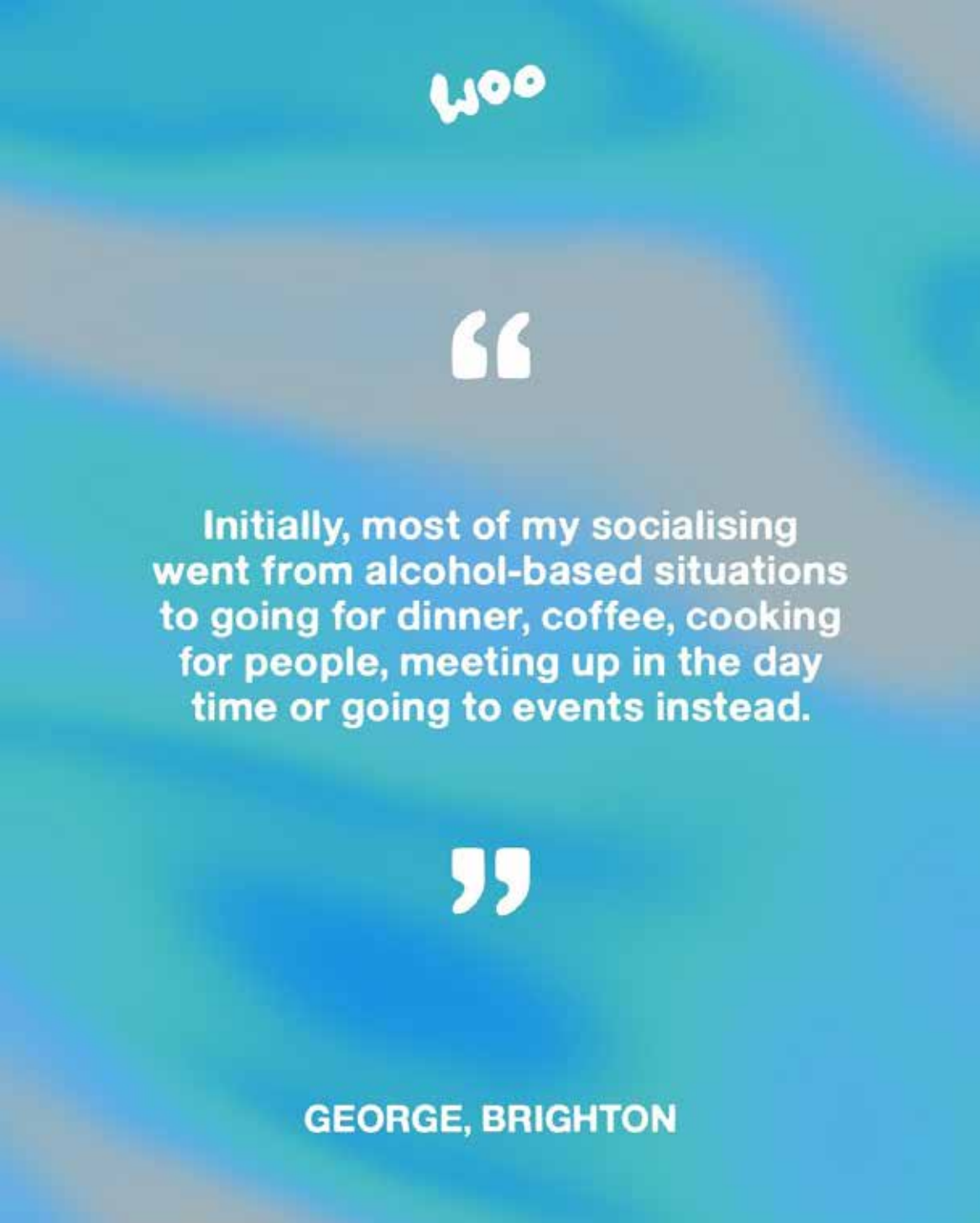
Brands such as 'Sylva' are inventing new beverages that **celebrate the power and majesty of the aging process**, just without the alcohol. This experimental approach is both epicurean and speaks to our inner gourmand, playing on our nature as consumers and breaking new ground. Both familiar yet novel, Sylva takes on the deep history and artisanal expertise that has evolved over generations of whiskey craft to produce a new product for the market of today.

The recent matcha shortages in Japan are endemic of **consumer demand for the very best products**, that are authentic and refined. The narrative of asking 'what's your poison?' is increasingly answered with matcha lattes, artisanal coffees or artesian water in response. It's more common nowadays to find a coffee enthusiast than a wine connoisseur.

As the sober curious demand more choice from the No & Low category, brands are delivering with exciting new offerings, from the 'euphorics' and 'neutropics' of Kin, CBD infused beverages and probiotic fermented drinks, the next-gen kombuchas and rise in mocktail style boba 'bubble teas'. All of these evolving drinks serve to add new layers of opportunity for brands tapping into 'No & Low' as a serious category, relevant for today's tipple of choice.

“The sober curious movement is changing the social perception of sobriety, making non-alcoholic drinks more socially acceptable and desirable.”

—Mintel, 'Sober Curious Nation'



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BEST-IN-CLASS

Spaces to sip.

OUR TOP 3 FAVOURITE BEVERAGE EXPERIENCES

“Where we choose to imbibe is as important as why, and both are changing rapidly. Mass market on-trade’s a bore, unique culture niches deliver more.”

JOSH KNOX – ASSOCIATE CREATIVE DIRECTOR, D4R

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KEY SPACES

If not traditional on-trade environments, then where?



Café raves
& listening cafés.

Cafés have evolved into more than coffee stops; they’re multifunctional cultural hubs where music, creativity, and connection intersect. As laid-back yet curated spaces, they offer a revitalised rhythm for socializing, blending serious music appreciation with the intimacy and accessibility people crave.



Secret bars
& speakeasys.

Today’s consumers crave ceremony when they choose to drink, which explains the allure of secret bars and the speakeasy revival. These hidden spaces offer cocktails and a service that delivers intimacy, belonging, along with a sense of occasion an experience that can't be had at home.



Home hosting
& supper clubs.

Dinner parties and supper clubs are redefining drinking at home. Intimate and creative, they give hosts the chance to curate the mood. Host's are elevating their nights through epicurean pairings, food matched with drinks in exciting, unexpected ways that are hard to find outside of capital cities or at accessible pricepoints.



Immersive events
& pop-up bars.

Pop-up bars and immersive events deliver interactive immersion; they create sensorial moments alive with culture. By fusing narrative, design, and community, they transform alcohol into experiences that spark curiosity and connection. For consumers hungry for novelty, these fleeting spaces hit differently, offering discovery and the magic of “had to be there” moments.



OUR FAVOURITE LISTENING CAFÉ — MOGO, MILANO

“MOGO is a Hi-Fi restaurant in the heart of Isola. A multifaceted space designed to welcome different kinds of guests at any time of day, MOGO blends culinary creativity with a deep love for sound.”

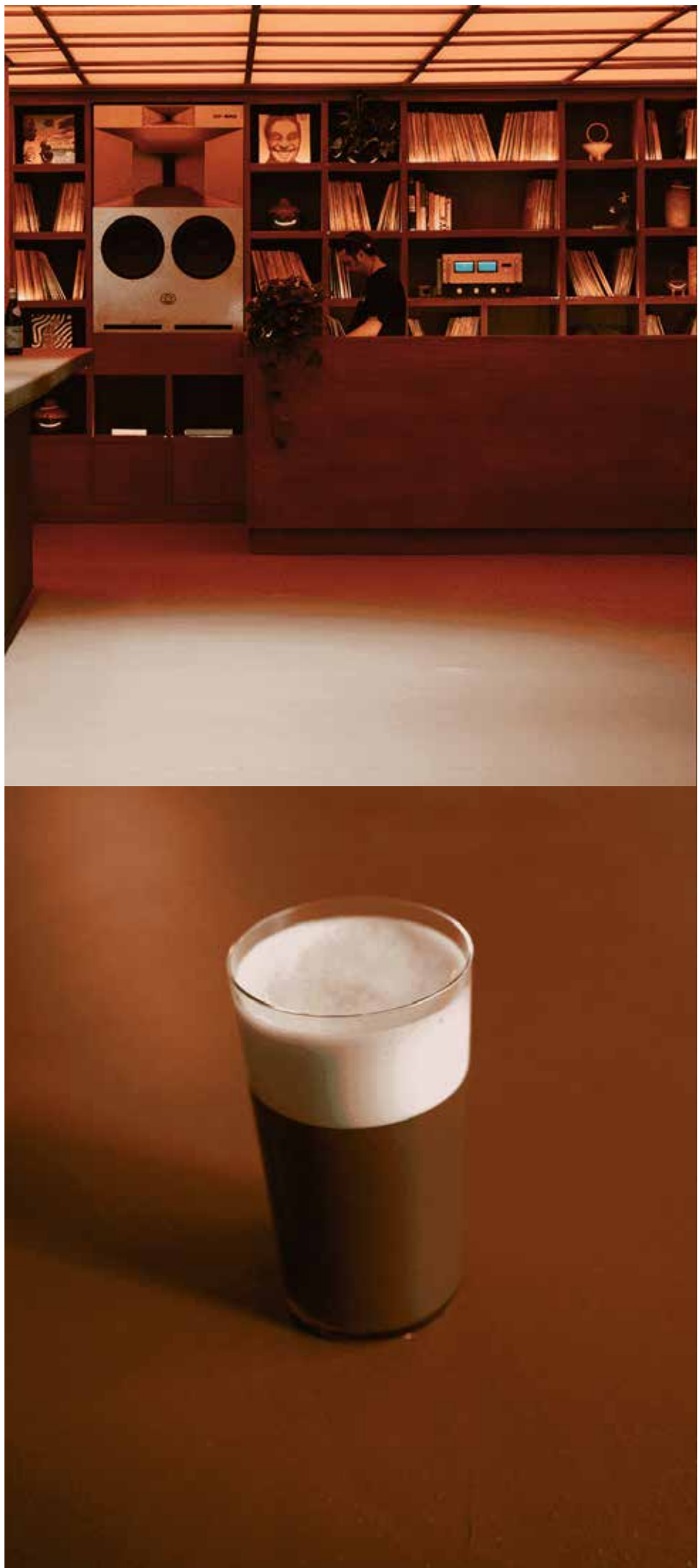
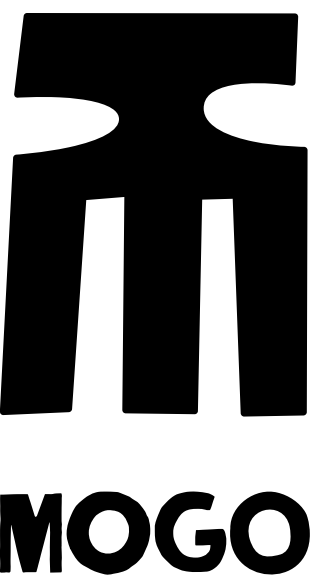


MOGO in Milano’s Isola district is a hotspot for experiential imbibement. **The space evolves seamlessly throughout the day, from a sophisticated lunch spot to an afternoon immersed in sound, and into eclectic dinners and crafted drinks at night.** No gimmicks, just good vibes and mutable moments that change throughout the course of the day.

It’s where culture intersects with experience, offering moments that are dynamic, memorable, and entirely your own. At MOGO, high fidelity isn’t just about sound — it’s about how you engage with the space.

“Restaurants are now joining the party, pairing curated vinyl sets with seasonal menus and signature cocktails.”

—Yatzer





OUR FAVOURITE SECRET BAR — BAGHERA, VANCOUVER

“Designed with a spirit of wanderlust and conceived as an escape from the everyday, we welcome you to travel with us, awaken your curiosity, and explore your surroundings with wonder.”





Bagheera in Vancouver’s Chinatown is immersive hospitality embodied, where **the experience begins before you even step inside**. From the street, it appears as a humble betting shop, but placing a \$100 bet on “King Louie” reveals a secret doorway to a world of intrigue.

Inside, turn-of-the-century India comes alive, a 42-foot hand-carved teak bar, rich jewel-toned interiors, and a 45-foot jungle mural create a space that is both luxurious and playful. With a Cabinet of Curiosities stocked with rare whiskeys and intimate lounges for connection, **Bagheera turns drinking into an adventurous, sensorial, and unforgettable experience.**

“Centered around the namesake of the majestic black panther in Rudyard Kipling’s the Jungle Book, the scheme has a decidedly sexy, feline, feel that oozes luxe and excess,”

—Marie Soliman, Co-founder, Bergman





OUR FAVOURITE SPEAKEASY — WAX RABBIT, LAS VEGAS

“A luxe environment that celebrates the richness of Mexican culture, from the carpet to the finest mezcal tipples on offer.”





Wax Rabbit Speakeasy in Las Vegas is a masterclass in **narrative-driven hospitality**. Tucked inside the Durango Casino and Resort just off the Strip, the venue transforms cocktail drinking into an immersive journey. Wax Rabbit **blends myth, artistry, and design** to create a space that feels alive with story and symbolism.

The concept draws on the Mexican legend of El Centzon Totochtin, the 400 Divine Rabbits born of the agave goddess Mayahuel and the god Patecatl. **This myth shapes the entire experience, influencing the spatial layout, materials, and artistic details.** The result is an environment where design and storytelling are inseparable, unfolding gradually to engage the senses and **turn a night out into a memorable, multi-layered adventure.**

The space feels enrobed by velvet red hues, and embellished with details reminiscent of traditional Mexican red dresses know as 'Huipil'. Spaces like Wax Rabbit show us the power of connecting to narrative and being relevant locally, and how tapping into it can build a sense of destination — **a grailed place that people will travel for.**

“the venue offers more than just cocktails—it offers a journey through storytelling, design, and cultural symbolism.”

—FRAME



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THE POWER OF

Experience-first activations.

BRAND WORLD ACTIVATION

“Leading with the experiential,
steeped in authenticity, opens the
door for spirits brands to engage with
consumers on their terms.”

JOSH KNOX – ASSOCIATE CREATIVE DIRECTOR, D4R

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818 TEQUILA - OUTPOST

“Celebrity tequila brands are performing a community role as custodians of culture, delivering innovative brand expression, crafted spirits, and connecting with diverse youth culture.”



“every touchpoint has a specific community-driven hospitality experience in mind.”

—Kathleen Braine, CMO 818 Tequila



818 Tequila is shaping culture and providing a platform for it. Kendall Jenner’s Outpost activations show how **a celebrity brand can evolve into a community hub**, blending crafted tequila with storytelling, design, and connection. At Coachella, the 818 Outpost reimagined a 1970's Americana road trip, pastel-toned and cinematic, with nods to retro drive-ins and vintage Beverly hills hotel glamour.

The activation felt intentional, moving beyond forced excuses to drink, with guests living inside a curated ecosystem of culture:
DJ Pee .Wee on decks, Rhode Beauty, Postmates and many other brands in support, and immersive touchpoints from photo ops to custom cocktails, there was something there for everyone.

As CMO Kathleen Braine says, “curating moments that are magical and bringing people together is at the core of what we do.” 818 Tequila brings together food, drink, music, fashion, social interaction, narrative, fun and a shoppable reality, creating festival like platform for consumers to become staunch fans of the brand.

The formula works — the Outpost drew **1,500+ attendees, generated 1.3 billion social impressions**, and proved that 818 isn’t just part of the party, it’s setting the stage.



818 TEQUILA

The brandworld building toolkit:



A clearly relatable *point of view*.

Cafés have evolved into more than coffee stops; they’re multifunctional cultural hubs where music, creativity, and connection intersect. As laid-back yet curated spaces, they offer a revitalised rhythm for socializing, blending serious music appreciation with the intimacy and accessibility people crave.



Brand collab *ecosystem*.

Today’s consumers crave ceremony when they choose to drink, which explains the allure of secret bars and the speakeasy revival. These hidden spaces offer more than cocktails they deliver intimacy, belonging, and a sense of occasion that transforms drinking into an experience worth indulging in.



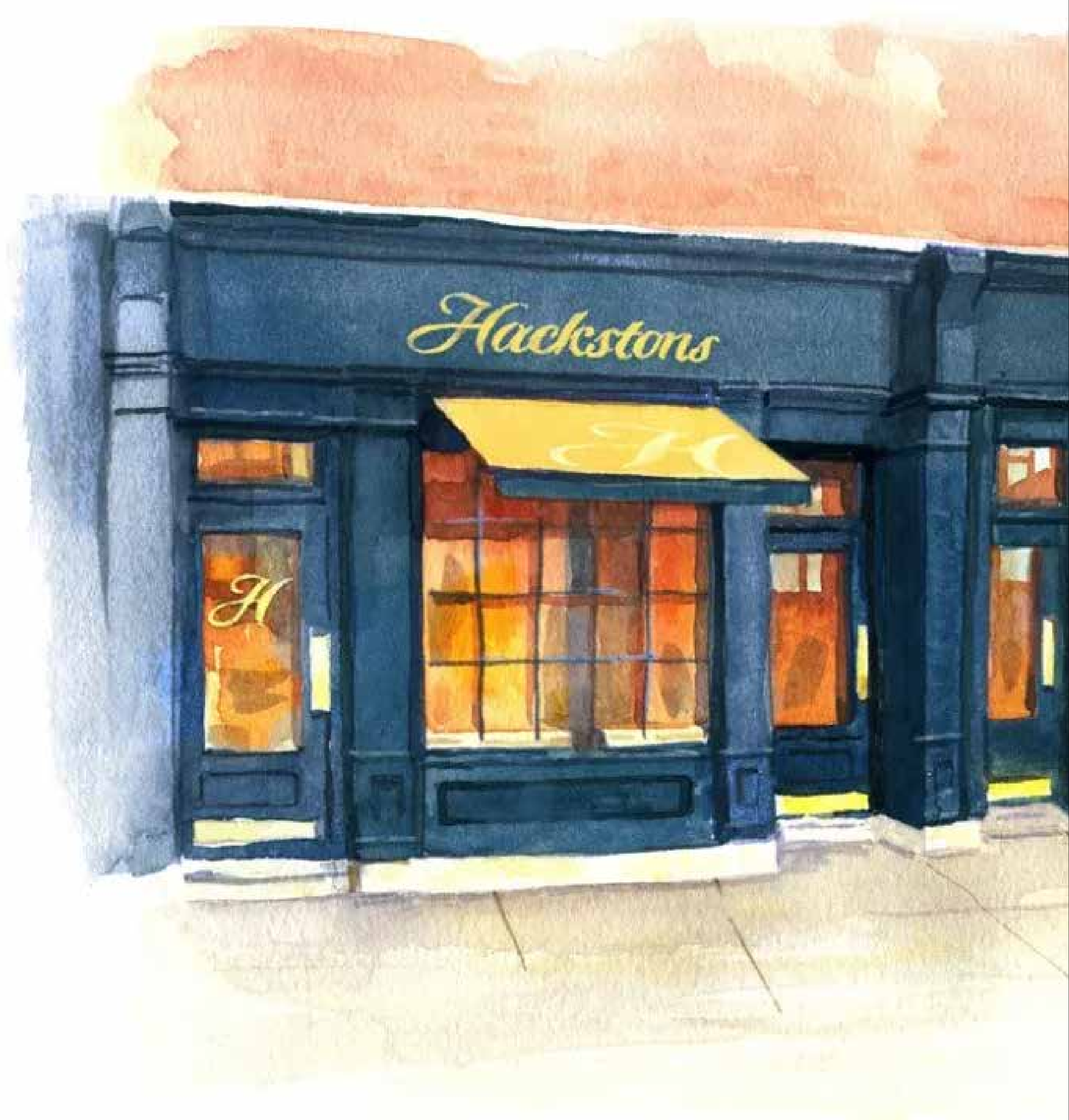
Music, art and *culture—together*.

Dinner parties and supper clubs are redefining drinking at home. Intimate and creative, they give hosts the chance to curate the mood and elevate the night through epicurean pairings that match drinks with food in exciting, unexpected ways that hard to find outside of capital cities or accessible pricepoints.



Exclusively viral *give-aways*.

Pop-up bars and immersive events deliver more than a drink; they create sensorial moments alive with culture. By fusing narrative, design, and community, they transform alcohol into experiences that spark curiosity and connection. For consumers hungry for novelty, these fleeting spaces hit differently, offering discovery and the magic of “had to be there” moments.



HACKSTONS — LONDON

“Hackstons redefines the luxury spirits market with a unique blend of tradition and modernity”

LUXURIATE LIFE MAGAZINE

Hackstons has opened its new flagship store with a concept **rooted in experience and service for the discerning consumer**. The brand offers a taste of excellence for wine and whiskey enthusiasts, **curating a bespoke path of discovery**.

Service is elevated to match the expectations of its elite clientele. **Sales assistants carry the gravitas and knowledge of sommeliers**, using the space itself as part of their storytelling to guide customers through exploration.

Design cues drawn from the rugged Highlands of Scotland define the space: natural materials, warmly intimate lighting, and the brand’s signature blue. **A sense of ceremony runs throughout, from the browsing zone to the private tasting room.**

Hackstons is a masterclass in hospitality, proving how **service can drive success** when intrinsically woven into the function of a space.

“It’s not only a space where London’s most discerning drinks enthusiasts can purchase and invest in high-end, rare whisky, fine wine and spirits; it’s also a striking example of how a company can successfully move from the digital to the physical.”

— World Brand Design



HACKSTONS

The service toolkit:



Staff, Sommeliers, & personal guides.

It all starts with the staff — with elevated offers, they can make or break a sale. Dressed to impress, with the expertise to back it up, Hackstons team feel less like sales assistants and more like a personal shopper with an almost 'Les Clefs d'Or' concierge level of professionalism that instils trust in their support.



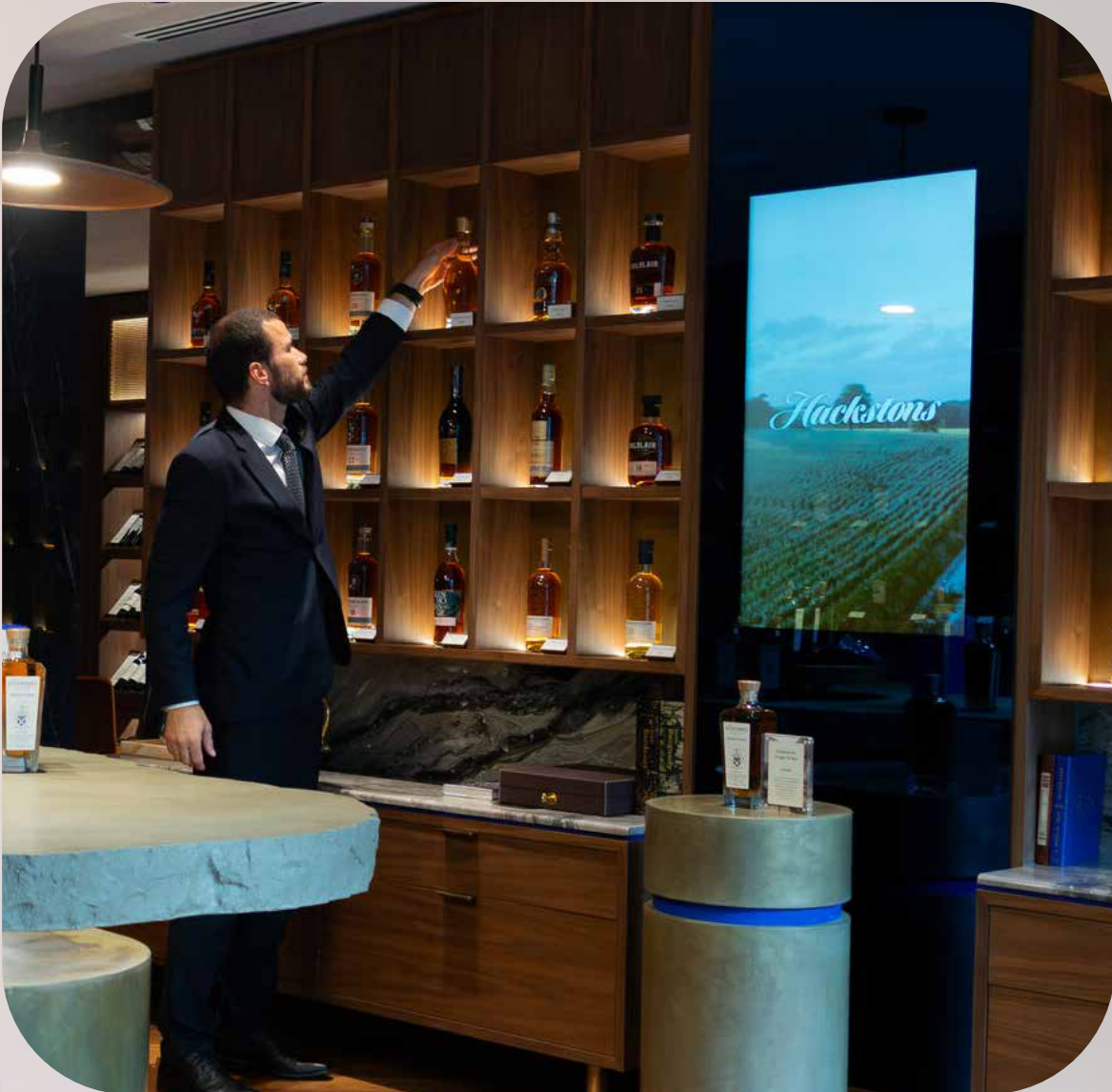
The tasting ceremony.

The tasting ceremony happens in an enshrined space, that is inherently intimate in its design. Although entirely bespoke and exclusive to the individual, the moment is best enjoyed together, exploring the very best product in a guided way that elevates the discernment process and makes each customer feel important to the brand.



Tailored *tempo* of exploration.

The space offers multiple pathways to discovery, aligned with shopper mindset and need state. From a lightly merchandised entrance that eases choice fatigue, to an ergonomically displayed bottle library that shows breadth, digital showcases, and a private tasting room offer focus on an individual level, the store delivers a tailored experience throughout.



Immersively intentional design.

From integrated lighting that highlights the rich amber of their whiskeys to evocative props that reflect product and brand origin, the design tells a story. Digital showcases punctuate product areas, delivering meaningful content. The store surrounds patrons in a balance of props, storytelling, and digital content, fully immersing them in the brand world.

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GLOBAL TRAVEL RETAIL

GTR Brandworld translation.

SHOWING UP & STANDING OUT

“Global Travel is a brand building marketplace, with a consumer in a different mindset, captive, shopping with a different lens to the ordinary.”

DIAGEO — GLOBAL TRAVEL



SUNTORY — 'THE HOUSE OF SUNTORY'

“Designed to deliver an immersive and memorable experience, the focus of this premium brand showcase is to drive brand education, awareness and trial purchase.”

WENDY MORELY, GTR MAGAZINE



Across its travel retail estate, Suntory has rolled out the House of Suntory concept, an environment that elevates its portfolio with elegance and cohesion. **Drawing on the strength of its Japanese origins**, the design language leans into materiality, aesthetic purity, and a contemporary take on traditional 'Kigumi' craftsmanship — all rooted in the brand’s mantra, **“The Nature and Spirit of Japan.”**

Beyond a one dimensional retail format, the concept acts as **a metaphor for refinement and craft**, subtly signalling the quality of the products it houses. Instantly recognisable, it communicates a story without words, offering shoppers an unique brand world that feels **both distinctive and consistent across multiple locations**. Amid the crowded travel retail landscape, House of Suntory stands apart as a space of calm, culture, and craft.



SUNTORY

Brand world toolkit.



Connection to craftsmanship.

The house of Suntory concept features an ownable expression of craft, in the form of artisan 'Kigumi' joinery. This beautiful timber art form and painstaking construction acts as a visual metaphor — representing the care, craft and attention that Suntory instill in their products. The realisation of this concept is a testament to the brands comittment to quality.



Japanese brand origin expressed.

The concept expresses the brand origin through a multitude of Japanese design references. Using a minimalist yet warm aesthetic, the brand leans into the strength of it's cultural origin. From circular framed content, reminiscent of 'satori no mado'— windows of enlightenment, to the concentric ring details of zen gardens, the concept exudes a clear and authentic theme.



Visual consistency, concept flexibility.

Suntory understand the power of visual consistency for both brand recognition and ownership of any and every space they appear within. The house of Suntory concept features flexible elements and a tight materials palette that make it easy for them to take advantage of the opportunities and quirks each GTR and SIS site afford them.



Clean lines, clear story.

A clear visual differentiator for the brand is it reduction in visual noise. The GTR environments is after filled with brands all vying for attention, dialling up display and digital to the max. Suntory however, have understood this and taken a different approach. By employing clean lines, negative space and a purity of design, Suntory change the pace, highlighting themselves elegantly.

BRING THE MANA

TEREMANA TEQUILA

“a huge success, disrupting the tequila category and is now well on the way to achieving brand internationalization.”

ATOOSA RYANNE ARFA, GTR MAGAZINE





Since its April 2024 launch, Dwayne “The Rock” Johnson’s premium small-batch tequila has quickly established itself in global travel retail, now present across all regions and **engaging more than 23 million consumers in 16 markets.**

With an accessible concept and strong marketing push, Teremana has translated seamlessly into the channel. Its **bold, ownable aesthetic** amplifies the brand name, while the authenticity of its **craft reassures consumers.**

The rustic yet refined vibe, from blue-on-blue styling and double-denim uniforms to terracotta tones, agave plants, and South American illustrations, sets it apart. **Johnson’s presence lends star power,** but the narrative remains respectful, positioning him as **a custodian of an already rich tradition of mezcal and tequila making.**

A simple yet pure expression of brand that speaks to consumers and stands out from the crowd. The brand have shown us that with careful investment, story-telling and propping, an impactful brandworld can be built without breaking the bank.



TEREMANA

Brand world toolkit.



Brand imagery,
to physical texture.

Teremana knows the star power of its owner Dwayne 'the rock' Johnson, whom uses his celebrity to shine a light on the Agave producers and farmers often hidden behind the scenes. Through brand imagery they connect us to the on the ground narrative, whilst echoing it through staff uniforms, earthy textures and illustrative patterns.



Story-telling
thematic props.

The brand tells stories well through its content, but adds a final flourish via planted agave props and red earth that add a sense of tactility and visual theatre. The props add another dimension to identify the brand with, going beyond a purely graphic approach to create visual disruption.



An *ownable*
brand palette.

The brand's palette has strength, drawing on an ownable pairing of bold blue colour and pops of rich illuminated timber. Angular graphic devices build recognition and act as a contemporary foil to the heritage illustrations that adorn the bold brand colour drench effect found across their travel retail spaces.



Tone of voice
expressing culture.

Teremana aren't afraid of using Spanish and Mexican tone of voice to help categorise and add flavour to their comms. Although for those new to tequila and mezcal, 'anejo' and 'blanco' may not be immediately understood, what it does do is create intrigue, a reason to speak to staff or learn more. It adds a clear connection to the culture of the brands origin, inspiring with layers of authenticity.



THE MACALLAN BOUTIQUE — LONDON HEATHROW T5

“Spectacular experiential spaces
rooted in place, nature,
and whisky mastery.”

BOMPAS & PARR



The Macallan boutique house concept delivers a curated experience that feels truly flagship in spirit. It's masterful translation into the GTR environment is testament to it's quality, as the carefully distilled format is **pivotted for the pace and curiosity of global travellers.**

Every detail, from the considered flow of the space to the storytelling embedded in product displays, has been designed to balance spectacle with intimacy. Guests are introduced to a selection of whiskies and brand narratives in an environment that feels immersive, yet approachable.

The design draws a direct line back to the nature of Speyside. Architectural timber and embroidered red leather surfaces carry a sense of craftsmanship, while textured finishes recall Scotland's rolling landscapes and the forms of the brand's distillery. Focused lighting highlights the warm amber of the whisky, and authentic dried flowers add another layer of flavour, rooting the space in its origins.

Digital touchpoints elevate the experience further, with interactive content and an **AI-led recommendation tool** guiding travellers through flavour profiles to discover the whisky best matched to their personal tastes and occasions.



THE MACALLAN

Brand world toolkit.



The landscape of Speyside.

The concept speaks to the landscape of Speyside, and is reverent of the architecture of their iconic distillery. Expressed in abstract forms, gentle rolling curves and elemental materiality — masterfully evoking the brands home turf.



Artful tasting *without* tasting.

Getting liquid on lips can be challenging, especially in dry or restricted markets. With limited chances to match product to taste, guiding consumers to the right choice becomes crucial. The Macallan excels here with a “tasting without tasting” ritual, blending digital tools and tactile artefacts to help shoppers discover a whisky that feels personal and precise.



An environment of serenity.

The Macallan’s boutique concept is finely tuned for exploration and enjoyment. Product density feels balanced, enough to invite discovery, yet spacious enough for reflection, like savouring a fine whisky. The pace and flow of the journey encourage curiosity, product is displayed almost serendipitously, and theres space to tell stories through texture and mood building.



Craft is in the *details*.

The space exudes quality, but it’s the details and the brand’s attention to the little things that create its distinction. From finishing touches like stitched leather to curated product placement, every element is deliberate. The brand’s whisky experts add a human dimension too. Together, these details form a metaphor for the brand’s craft and uncompromising quality.

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LIQUID FUTURES

Need to future-proof your brand?

HOW CAN D4R HELP?



How can D4R help you craft the future of beverage?

At D4R we’ve partnered with some of the world’s most recognisable names across sectors, but our work in whiskey, spirits, and beverages holds a special place. From Johnnie Walker to Talisker, The Singleton to Smirnoff, our collaborations with Diageo have given us the perspective and expertise to create brand experiences that resonate and endure.

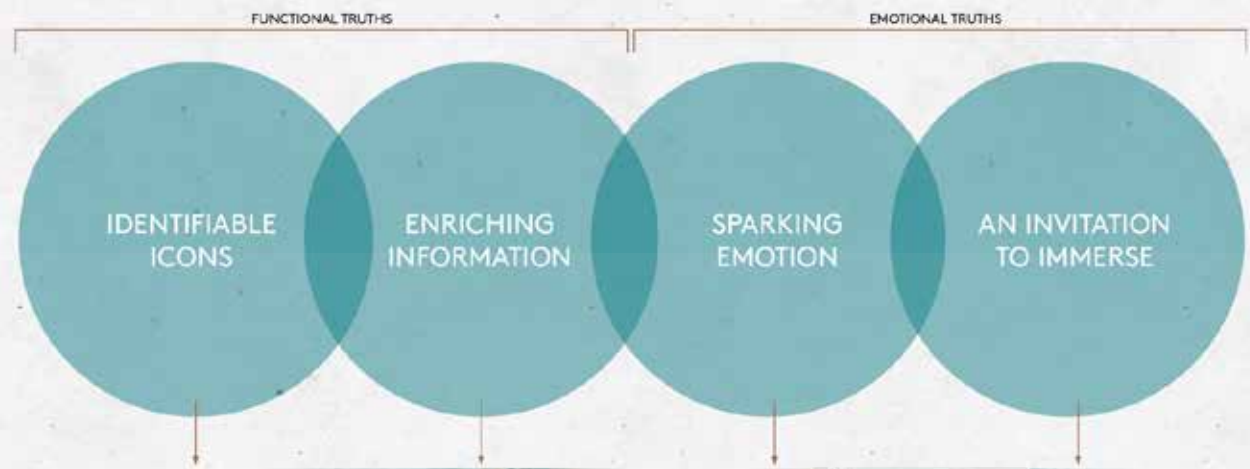
We know what it takes to cut through in an increasingly crowded market. By shaping brand worlds that live in memory, and by designing environments that disrupt visually and sensorially, we help brands connect with consumers in meaningful ways.

Whether it’s a flagship space, a temporary activation, or a premium travel retail showcase, we bring fresh ideas grounded in insight and craft.

Our approach always begins with the story, understanding your brand, its marketplace, and its audience — then amplifying what makes it unique. The result is work that doesn’t just look good, but moves the needle commercially and culturally.

“Let’s talk about how we can take your brand to the next level.”

Vanessa K — Director of marketing



- 01 Digital Header
- 02 Curved, illuminated panel
- 03 Digital screen
- 04 Ombre reeded inner panels - Ombre colour running full height of wallbay

Case study:
Talisker — GTR guideline

[Click here.](#)

Case study:
The Singleton — GTR guideline

[Click here.](#)





In conclusion, *beyond the bottle.*

This report has shown how culture is reshaping the spirits world. From home-hosted suppers and immersive speakeasies to luxury tribes seeking ceremony and global travellers craving stories over souvenirs. What connects it all is a simple truth: people want experiences that feel meaningful, layered, and alive.

For spirits brands, the opportunity lies in moving beyond product into culture, crafting environments and activations that people remember, talk about, and return to. The future of this industry won't be defined by scale alone but by the ability to create intimacy at scale, through design, storytelling, and sensory connection.

A background image featuring a glass of sparkling beverage with a lemon wedge and a cork stopper, overlaid with a semi-transparent grid and a reddish-orange tint.

Cheers.

Let's talk.

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