

"The fear of doom is over," Jeff Hagley says. At Atlanta's *Restaurant Eugene*, he's watched his guests shed "the shock and withdrawal we saw over the past few years. If it's a special occasion, they're planning to spend. They're expecting it."

Sommeliers are upbeat by nature, and with incremental improvements in the economy, their optimism has surged this year. Some have gone on auction buying sprees, restocking old vintages of Bordeaux and Burgundy. Others are looking to Eastern Europe and the far shores of the Mediterranean for new names to add to their lists.

Closer to home, wine directors are voicing more excitement about California wines. While they may view oak-driven chardonnay and cabernet as a fact of life, they're rethinking

their stance on American wines overall, pressured, in part, by their own proclivities for serving local food. In Pursuit of Balance, a group spearheaded by Jasmine Hirsch and Rajat Parr, has added to the buzz around young winemakers working with moderated ripeness and varieties unknown.

Add the disruptive technology of the iPad wine list, which some sommeliers hail and others disdain, and you'll find yourself at the center of a restaurant wine market exploding with the new. May we show you to your table?

TECH BYTES

Wine & Spirits Annual Restaurant Poll has served as a reference for consumers and the sommelier trade for almost a quarter century, collecting information on the most popular wines in America's most popular restaurants. Many of the sommeliers at these restaurants pride themselves on the personal interactions they have with guests and the care they take in selecting wines to pair with the chef's menu. And few of our respondents currently work with digital wine lists (about seven percent, to be exact). Some, in fact, would like to see all cellphones and other tech-distractions turned off at the table.

But many restaurants will adopt new digital wine lists in the months and years to come, opening up data-mining opportunities that have never before existed. To explore these opportunities, we worked with two companies in the digital space to provide some simple analyses for our this issue.

SevenFifty.com aims to aggregate distributor stock lists and create "one-stop" comparison-shopping for sommeliers and retailers. Since its launch in the New York City and New Jersey markets, we've followed developments at SevenFifty through Chris Hallowell, a former tastings director at *Wine & Spirits*, now in business development at this online firm. He agreed to provide data on searches that sommeliers conduct on their site. As SevenFifty expands into new markets, their search statistics may provide insight into the kind of wines that are immediately of interest to sommeliers—and what may soon be of most interest to their guests.

Josh Hermsmeyer of Labrador Omnimedia, whose Tastevin wine list program is profiled on page 8, also agreed to conduct some research for this issue. Though in both cases, the depth of the current data is limited, as these firms develop, they will open windows into the restaurant wine market that have never been open before.



"We have the ability to aggregate and anonymize the data from our clients. We're not only interested in what gets sold in, but what gets sold out."

–Josh Hermsmeyer, Labrador Omnimedia

LABRADOR OMNIMEDIA POPULAR VARIETIES BY-THE-GLASS

Hermsmeyer defines Labrador Omnimedia's clients as mainly white tablecloth, fine dining establishments. He segmented his clients into three groups, by the average price of a meal per person, and then looked at individual transactions by variety. Most of his data is based on by-the-glass transactions, so we focused on the number of those transactions, highlighting the most popular varieties. The table shows red blends as a favorite at less expensive restaurants using Labrador Omnimedia software, while chardonnay holds the strongest position among their higher-end restaurants.

BY-THE-GLASS WINES BY VARIETY

LABRADOR OMNIMEDIA DATA	Restaurant's Average Check per Person		
	<\$30	\$30-\$60	>\$60
Chardonnay	8.9%	21.3%	15.0%
Cabernet Sauvignon	10.1%	13.5%	9.4%
Pinot Noir	9.9%	10.1%	6.2%
Red Blends	13.8%	7.7%	2.0%
Sauvignon Blanc	5.8%	7.2%	11.1%
Pinot Grigio	6.1%	6.1%	4.5%
Merlot	2.3%	4.2%	2.1%
Malbec	9.2%	3.7%	0.4%
Sparkling	-	3.0%	33.0%
Riesling	3.3%	2.2%	3.6%
Prosecco	6.2%	2.0%	
BTG % of Total Wine Transactions	69%	80%	65%

(Data reflects wine transactions at 67 Labrador Omnimedia Restaurants, Calendar Year 2012)

SEVENFIFTY

SEARCH DATA ON POPULAR VARIETIES

SevenFifty aggregates distributor lists in a readily searchable online format for sommeliers, so this chart doesn't highlight consumer preferences, but instead sommelier interests. Chris Hallowell provided data on searches by sommeliers in the New York and New Jersey markets, segmenting his user base into three groups, by the average price of a meal. (Note that his groups are slightly different than Hermsmeyer's.) The SevenFifty data does not represent sales; instead, it highlights what sorts of wines are of interest to sommeliers as they build their wine lists.

NY/NJ SOMMELIERS VARIETY SEARCHES

	Restaurant's Average Check per Person			
SEVENFIFTY DATA	<\$46	\$46-\$65	>\$65	0verall
Pinot Noir	19.4%	20.6%	16.5%	18.8%
Cabernet Sauvignon	14.9%	6.3%	16.3%	12.5%
Chardonnay	3.5%	9.1%	16.9%	9.8%
Syrah	13.7%	3.3%	4.4%	7.1%
Riesling	9.8%	5.3%	2.4%	5.8%
Nebbiolo	3.5%	6.3%	5.8%	5.2%
Sauvignon Blanc	1.6%	4.0%	5.5%	3.7%
Sangiovese	0.1%	5.5%	2.7%	2.8%
Malbec	3.8%	0.7%	3.2%	2.5%
Chenin	4.0%	1.0%	1.8%	2.3%
Tempranillo	1.9%	0.3%	4.2%	2.1%
Zinfandel	0.5%	4.1%	1.0%	1.9%
Total # of Searches	7,866	14,620	17,963	40,449

(Data reflects searches for the Fourth Quarter of 2012)