

# THE BEAUTIFUL OPPORTUNITY

World Cup 2026 On-Premise Deep Dive

GROUND SIGNAL





The FIFA World Cup is the largest sporting event in the world — with more than 1.5 billion viewers tuning in to the 2022 final alone. With an expanded format and matches hosted across North America, the 2026 tournament is expected to deliver record viewership, attendance, and fan engagement. For the beverage alcohol industry, this represents a major commercial opportunity — not just through sponsorships and off-premise activation, but through increased traffic and consumption as fans gather in On-Premise venues to watch the beautiful game.

But winning this moment requires more than relying on four-year-old benchmarks from a very different environment. To deliver timely, actionable insights, Ground Signal expanded the analysis beyond prior World Cup data to include global On-Premise soccer conversations across major clubs and competitions — building a sample of consumers and venues primed for the occasion.

This approach allows us to identify:



**Consumer Demographics** and psychographics shaping which brands, categories, and cocktails are most likely to resonate with World Cup audiences



**Key Activities and On-Premise Drivers** frequently associated with soccer viewing occasions, providing context for purchase behavior



**Venue Profiles** where consumers most often mention watching matches, helping teams prioritize the right accounts



**Menu and Sales Signals** that validate social trends and highlight which brands, cocktails, and categories are already positioned to benefit — indicating where baseline lift may occur even if venues largely run existing menus

# Who is the World Cup / Global Soccer Consumer?

The global soccer On-Premise consumer skews heavily Hispanic (3.1x), with meaningful over-indexes for LGBTQ+, male, Gen X, and high-income demographics. Brands activating around the World Cup should prioritize culturally resonant, premium-leaning programming to match this distinct consumer profile.

Global Soccer consumers skew:  
Compared to All On-Premise Consumers (AOPC).

▲ 3.1x  
Hispanic

▲ 60%  
LGBTQ+

▲ 30%  
Male

▲ 10%  
Gen X

▲ 10%  
High Income



# What are Global Soccer Consumers' interests?

Beyond their passion for soccer (5.8 times more likely to demonstrate interest), global soccer consumers lead active, experience-driven lifestyles — over-indexing strongly for craft cocktails (2.9x), running (2.6x), coffee (2.4x), and photography (1.9x).

## Global Soccer consumers over-index for interests in:

Compared to All On-Premise Consumers (AOPC).



# What are Global Soccer consumers' alcohol interests?

Soccer consumers are highly engaged beverage alcohol enthusiasts, with outsized affinity for premium and trending spirits categories — particularly Mezcal (+7.7x), Cognac (+5.4x), and Tequila (+4.1x). This signals a clear opportunity for elevated, spirits-forward programming rather than defaulting to beer-centric activations.

Global Soccer Consumers over-index for:

Compared to All On-Premise Consumers (AOPC).



WINE

+2.7x



CRAFT BEER

+2.8x



TEQUILA

+4.1x



WHISKEY

+3.8x



MEZCAL

+7.7x



COGNAC

+5.4x

## CONSUMER SPIRIT BRAND AFFINITY

# What are Global Soccer consumers' favorite spirit brands?

When it comes to specific brands, soccer consumers gravitate toward established, culturally resonant names — with Jameson (+9.9x), Patrón (+8.5x), and Tito's (+7.6x) leading the pack. These brands are well-positioned to capture disproportionate attention and trial during World Cup activations.

Global Soccer Consumers demonstrate greater affinity towards:

Compared to All On-Premise Consumers (AOPC).

**JAMESON**  
IRISH WHISKEY

+9.9x

**PATRÓN.**

+8.5x

*Tito's*  
HANDMADE  VODKA

+7.6x



**BACARDÍ**

+5.2x

**HENDRICK'S**  
DISTILLED AND BOTTLED IN SCOTLAND  
GIN

+4.7x

**Hennessy**

+3.6x

# What Environments are leading the way while watching Soccer?

Global Soccer viewership aligns with casual, social formats — with Consumers significantly more likely to mention Taprooms (+491%), Reggaeton (+428%), and Bar Games (+326%). This points to a consumer who wants participatory, music- and culture-driven watch party atmospheres over traditional sports bar settings.

## Top Environments for Watching Global Soccer:

 Taproom	▲ 491%
 Reggaeton	▲ 428%
 Bar Games	▲ 326%
 Dive Bar	▲ 242%
 Patio	▲ 221%
 Billiards	▲ 215%
 Dog Friendly	▲ 178%

## OCCASIONS

# What other Occasions feature while watching Soccer?

Global Soccer viewing occasions are deeply intertwined with broader sports culture, with consumers significantly more likely to mention Football (+568%), Sports (+235%), and Basketball (+209%). Pre-game rituals and communal formats like Trivia and Happy Hour also feature prominently, underscoring that soccer fans are habitual On-Premise social drinkers.

## Top Global Soccer Occasions:

 Football	▲ 568%
 Sports	▲ 235%
 Basketball	▲ 209%
 Pre-Game	▲ 145%
 Trivia	▲ 83%
 Happy Hour	▲ 82%

# What cocktails do consumers most often mention when watching Soccer?

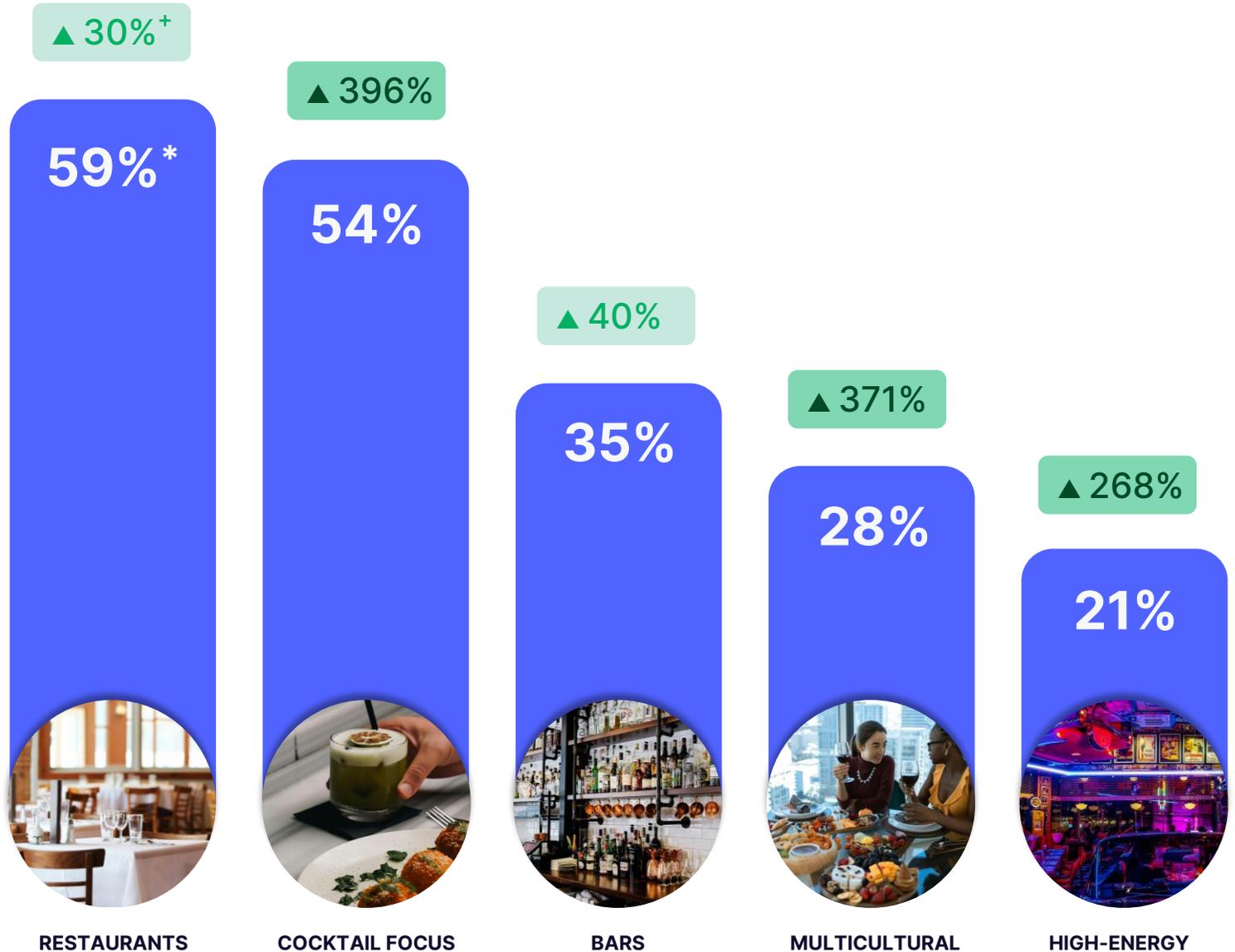
The cocktails most associated with soccer consumption skew global and culturally diverse — led by the Caipirinha (+743%), Irish Coffee (+662%), and Michelada (+414%). These choices reflect the multicultural makeup of the soccer audience and create a clear menu brief for venues looking to serve this crowd authentically.

## Top Global Soccer Consumer Cocktails:

 Caipirinha	▲ 743%
 Irish Coffee	▲ 662%
 Michelada	▲ 414%
 Screwdriver	▲ 337%
 Pisco Sour	▲ 154%
 Hot Toddy	▲ 150%
 Bloody Mary	▲ 126%
 Shots	▲ 117%

# Top Global Soccer venues

Soccer fans aren't just filling sports bars — the share of accounts where consumers are posting about soccer strongly over indexes for Cocktail-Focused (+396%), Multicultural (+371%), and High Energy (+268%) venues. The World Cup opportunity lives far beyond the expected, and brands that only activate in traditional sports settings will miss the majority of where this audience actually drinks.



\*Share of top Global Soccer Venues  
 \*Index versus all on premise accounts

For definitions of Ground Signal terminology used, please see page 17



# 11th St. Bar

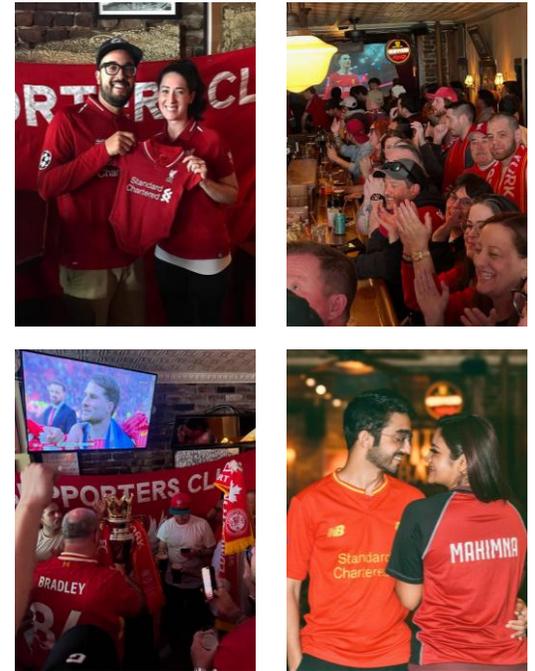
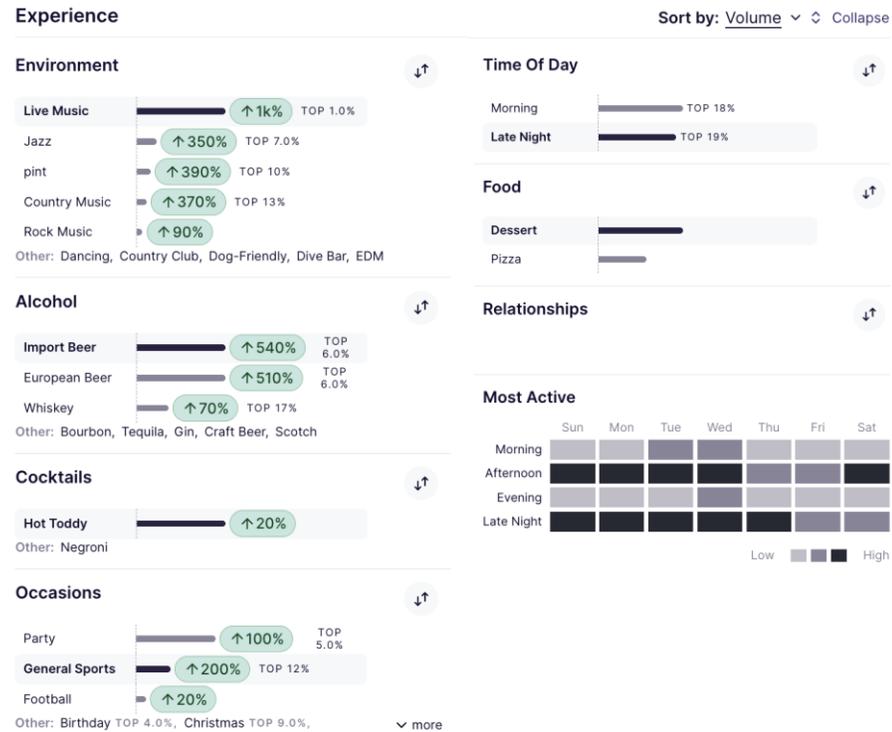
# Top Global Soccer Venue Example

The World Cup opportunity demands a wider lens than traditional sports bars — and 11th St. Bar illustrates why. On the surface it's a classic East Village Irish pub best known for its live music, not an obvious soccer destination. But peel back the data and a different picture emerges: known for its craft cocktails and communal partying, it is also the official home of the New York Liverpool FC Supporters Club. The fact that it has suspended its entire live music calendar for the duration of the tournament only underscores how these versatile venues will pivot their experience to capture World Cup related demand.

## BAR

This neighborhood Irish pub is popular with Liverpool fans, hosting occasional live music and poetry events, creating a vibrant atmosphere for sports and social gatherings.

📍 510 E 11th St, New York, NY 10009 📞 (212) 982-3929 🌐 [Website](#)



## Social Posts

#NYC #EASTVILLAGE #LIVEMUSIC #11THSTREETBAR #NEWYORK #11THSTBAR #MUSIC #NYCMUSIC #SINGERSONGWRITER #LIVERPOOL +10

# What cocktails are most frequently found on menu in Top Global Soccer Venues?

Top Soccer venue menus already skew toward more elevated, spirit-forward serves — with the Espresso Martini 11% more likely to feature on a soccer account menu than On-Premise menus generally. The trending cocktail data points in the same direction — the Lemon Drop Martini (+340% menu share growth), Hugo Spritz (+158%), and Mocktails (+100%) are all surging, suggesting that the menus where soccer consumers drink are already well-positioned to meet their expectations without significant intervention.

## Top Classic Cocktails in Global Soccer Venues:

		Menu Share	Index vs. all On-Premise Accounts
	Margarita	<b>56%</b>	+2.2%
	Old Fashioned	<b>40%</b>	+1.5%
	Martini	<b>32%</b>	+0.3%
	Espresso Martini	<b>30%</b>	+11%
	Sangria	<b>27%</b>	-12%
	Mule	<b>26%</b>	-4.3%

## Trending Classic Cocktails in Global Soccer Venues:

		YoY Menu Share Growth
	Lemon Drop Martini	<b>▲ 340%</b>
	Hugo Spritz	<b>▲ 158%</b>
	Mocktails	<b>▲ 100%</b>
	Limoncello Spritz	<b>▲ 44%</b>

# What brands are winning menus in Global Soccer venues?

Aperol leads all spirits brands in menu share across soccer venues at 31%, with Tito's Vodka (25%), St-Germain (18%), and Bacardí (15%) also strongly represented — a lineup that reflects the cocktail-forward, approachable premium profile of the soccer consumer. Notably, Hendrick's Gin's 8.3% menu share is 20% above the national average, a quiet but meaningful signal of gin's growing presence in this channel.

## Brands poised to win the World Cup at Top Global Soccer Venues

<p>Vodka</p>  <p><b>+25%</b></p>	<p>Tequila</p>  <p><b>+10%</b></p>	<p>Whiskey</p>  <p><b>+10%</b></p>
<p>Rum</p>  <p><b>+15%</b></p>	<p>Gin</p>  <p><b>+8.3%*</b></p> <p><small>*20% higher than national average</small></p>	<p>Cognac</p>  <p><b>+3.6%</b></p>
<p>Aperitif</p>  <p><b>+31%</b></p>	<p>Liqueur</p>  <p><b>+18%</b></p>	

# What brands are growing the fastest on Global Soccer Account Menus?

While established brands dominate menu share today, the growth data reveals a new wave of brands rapidly gaining ground in soccer venues — led by LALO Tequila (+124%), Bràulio Aperitif (+63%), and Reyka Vodka (+56%). Borghetti's eye-catching +8,000% growth is strongly influenced by base effects, but its trajectory is a signal worth watching — challenger brands with the right cultural fit are finding a foothold in this channel well ahead of the tournament.

## Trending brands at Top Global Soccer Venues

<p>Vodka</p> <p><b>REYKA</b></p> <p><b>+56%</b></p>	<p>Tequila</p> <p><b>LALO</b></p> <p><b>+124%</b></p>	<p>Whiskey</p> <p></p> <p><b>+46%</b></p>
<p>Rum</p> <p></p> <p><b>+50%</b></p>	<p>Gin</p> <p></p> <p><b>+20%</b></p>	<p>Aperitif</p> <p></p> <p><b>+63%</b></p>
<p>Liqueur</p> <p></p> <p><b>+8K%</b></p>		

# How are spirits sales in Top Global Soccer venues?

The depletion data confirms what the consumer and menu signals suggest — soccer venues dramatically over-deliver on spirits volume, with average account volume +72% higher than the national benchmark. Tequila/Mezcal (+60%) and Liqueurs (+51%) are the standout categories, while the average volume per account in Amaro/Aperitif/Vermouth categories is roughly 2x the national average— a strong validation of the aperitif and cocktail-forward trends visible in the menu data. Premium price tiers drive the highest volume, but the real story is the skew toward Super Premium, where share runs 30% above the national average, underscoring that soccer consumers aren't just drinking more — they're drinking better.

## Categories:

Average Account Volume is **72% higher** than the national average.



Tequila /Mezcal

▲ 60%



Liqueurs

▲ 51%

Amaro/Aperitif/Vermouth Share is roughly **2.0x** the national average.



Amaro/Aperitif /Vermouth

▲ 2.0x

## Tiers:



Premium



Super Premium

Volume is highest in **Premium price tiers** but skews towards **Super Premium**.

Super premium share 30% higher than national average.

# WORLD CUP 2026 DEEP DIVE SUMMARY

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## **The soccer consumer is distinct.**

Hispanic, male, Gen X, and high income — these are engaged, discerning drinkers who over-index heavily for craft cocktails and premium spirits.

## **The opportunity extends well beyond the sports bar.**

Soccer consumers are showing up at dramatically higher rates in Cocktail-Focused (396%), Multicultural (371%), and High Energy (268%) venues — and as the tournament approaches, even unexpected accounts are reorienting their entire on-premise experience around it.

## **The menus are moving in the right direction.**

Espresso Martinis, Lemon Drop Martinis, and Hugo Spritzes are surging, while Aperol, Tito's, and Jameson lead on brand presence — these accounts are already well-positioned to serve the soccer consumer.

## **The volume opportunity is significant.**

Average account volume runs 72% above the national benchmark, with a pronounced skew toward Super Premium — soccer consumers aren't just drinking more, they're drinking better – a trend which will likely accelerate during the World Cup

## **The window to act is now.**

The right accounts are out there, and the competitive landscape is still very much in flux — challenger brands are gaining ground fast ahead of the tournament.

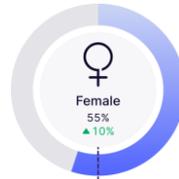


# GLOSSARY OF TERMS

## Consumer Skew

How much more likely a member of an audience is to be a member of a demographic bucket, as compared to on-premise consumers generally.

Example: If your audience is 55% female and the background audience is 50/50, your audience skews 10% female.



## Brand Affinity

What percentage of the audience demonstrates an affinity towards (mentions, follows, engagements) a particular spirits brands.

Example: If 10% of target consumers have engaged with a brand on social media, compared to 5% of the general market, then the target consumers are 2.0x more likely to engage with the brand.



## Environments and Occasions

Contextual information included in social media posts about a specific beverage-alcohol topic.

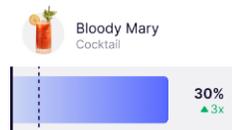
Example: #Patio #Party



## Over-Index

How much more likely on-premise consumers are to mention a particular environment or occasion, AND the topic in question as compared to mentioning that environment or occasion in general.

Example: If 30% of Bloody Mary posts mention Happy Hour but only 10% of all on-premise posts mention Happy Hour, we say consumers post about Happy Hour 3x when drinking a Bloody Mary.



## Trade Channel

Enhancement of existing channel classifications to more fully capture objective venue information.

Example: Mexican Restaurants, Italian Restaurants, Sports Bars, Nightclubs



## Key Trade Channel

Ground Signal's proprietary account classification schema that takes in to account consumer behavior, as well as objective venue characteristics.

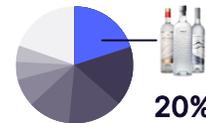
Example: Multicultural Focused High-Energy Dining



## Category Share

What percentage of the target accounts' spirits sales are a specific category and price tier according to Ground Signal's depletion benchmarks.

Example: If a venue sells 100 cases per year and 20 are Vodka, we say Vodka has a 20% Category Share.



## Average Category Volume

On average how much of a given spirit category per category+tier would an account sell among the accounts in question.

Example: If the average account sells 20 9L cases of Vodka per year, then the Average Category Volume is 20.



## Average Placement Velocity

How much a brand would expect to sell if it achieved distribution at one of the selected accounts.

Example: If a brand sells 5 cases on average across an account list, the Average Placement Velocity is 5.



## Brand Cocktail Share

Based on Ground Signal's menu database, what percentage of a given cocktail are made with a given brand.

Example: If a brand is featured in 10 out of 100 cocktails in our menu database, its Cocktail Share is 10%.



## Brand Menu Share

Based on Ground Signal's menu database, what percentage of accounts feature at least one cocktail made with a given brand.

Example: If a brand is featured in a cocktail at 10 out of 100 venues its Menu Share is 10%.



# AI Solutions for the Beverage Alcohol Industry

Ground Signal is leading a revolution in the beverage alcohol industry. Our mission is to empower business across the three-tier system to make better business decisions. Leveraging sophisticated AI and unique large scale data sources, we give our clients unparalleled visibility into consumer behavior in the On-Premise and allow the industry to better align its offerings, delight consumers and increase sales.

## Ground Signal Data Used In This Analysis

### CONSUMER

**1B+**

Monthly Social Posts

**100M**

U.S. Legal Drinking Age Consumers

### VENUE

**600+**

Venue Attributes

**250K+**

Locations with Behavioral Activity

### DEPLETIONS

**3+**

Years Depletion Data

**2K+**

SKUs

### MENU

**125K+**

On-Premise Menus

**3K+**

Spirits Products Identified

## CAPABILITIES

Consumer Insights

Market Trends

Account Segmentation

Key Trade Channels

National Accounts

Menu Analysis

Go-To-Market Strategy

Target Account List (GS Target)



**GROUND SIGNAL**

For more information on creating a cocktail strategy or to learn how Ground Signal can help power your business, please contact us [sales@groundsignal.ai](mailto:sales@groundsignal.ai)