

# MENU INSIGHTS: SPORTS BARS



Q4 2025 vs. Q3 2025

GROUND SIGNAL

Ground Signal captures online menus at over 120,000 venues nationwide. Using sophisticated AI tools, we extract relevant information and provide it in an easy-to-analyze format.



### Independent Sports Bars Overview

**2.9K**  
Accounts w/  
Menu

**2.7K**  
Accounts w/  
Cocktail Menu

**38.7K**  
Total # of  
Cocktails

**\$11.01**  
Average  
Cocktail Price

### Breakdown by Spirits Category

**2.3K**  
Menus w/  
Vodka Cocktail

**1.9K**  
Menus w/  
Tequila Cocktail

**1.9K**  
Menus w/  
Whiskey Cocktail

**1.9K**  
Menus w/  
Liqueur Cocktail

**1.6K**  
Menus w/  
Rum Cocktail

### Most Popular Classic Cocktails

COCKTAIL	MENU SHARE*
<b>MARGARITA</b>	56%
<b>OLD FASHIONED</b>	33%
<b>MULE</b>	33%
<b>BLOODY MARY</b>	32%
<b>MARTINI</b>	26%
<b>MIMOSA</b>	25%
<b>ESPRESSO MARTINI</b>	23%
<b>MOJITO</b>	17%
<b>PALOMA</b>	16%
<b>LEMON DROP MARTINI</b>	14%

\*Percentage of cocktail menus that feature this cocktail





# VODKA

# MENU PERFORMANCE

NATIONAL INDEPENDENT SPORTS BARS

Q4 2025 vs. Q3 2025



Ground Signal calculates menu share for each Vodka brand by taking the number of menus featuring a cocktail with that brand, then dividing that number by the total number of menus that have at least one Vodka cocktail.



**Vodka Cocktail Menu Share**  
 December 2025

For example: Three Olives is the 9th-ranked Vodka brand on independent National cocktail menus, appearing on 4.2% of cocktail menus that have at least one Vodka cocktail.

RANK	BRAND	SUPPLIER	MENU SHARE
1	TITO'S	TITO'S LALO TEQUILA	36%
2	ABSOLUT	Pernod Ricard	16%
3	KETEL ONE	DIAGEO	15%
4	DEEP EDDY	HEAVEN HILL BRANDS	14%
5	SMIRNOFF	DIAGEO	11%
6 ▲ <sup>1</sup>	GREY GOOSE	BACARDÍ	9.7%
7 ▼ <sup>1</sup>	STOLI	STOLI GROUP	9.4%
8	NEW AMSTERDAM	GALLO	4.8%

RANK	BRAND	SUPPLIER	MENU SHARE
9	THREE OLIVES	PROXIMO	4.2%
10 ▲ <sup>1</sup>	WESTERN SON	SAZERAC	3.0%
11 ▼ <sup>1</sup>	CÎROC	DIAGEO	2.8%
12 ▲ <sup>3</sup>	WHEATLEY	SAZERAC	2.4%
13 ▼ <sup>1</sup>	PINNACLE	SUNTORY	2.3%
14	EFFEN	SUNTORY	2.1%
15 ▼ <sup>3</sup>	SKYY	CAMPARI	2.0%
16 ▲ <sup>1</sup>	SVEDKA	SAZERAC	1.8%

By retrieving and analyzing all on-premise venues nationally each month, Ground Signal can show which brands are having a moment — and which are lagging behind their peers. (Limited to the 21 Vodka brands with at least 1.0% Menu Share nationally.)



 **Vodka Nationally: Trending Up**  
Q4 2025 vs. Q3 2025

BRAND	SUPPLIER	MENU SHARE*	%Δ IN MENU SHARE**
HAKU	SUNTORY	1.0%	▲ 22%
WHEATLEY	SAZERAC	2.4%	▲ 17%
SVEDKA	SAZERAC	1.8%	▲ 11%
PEARL	LUXCO	1.8%	▲ 5.8%
BELVEDERE	LVMH	1.0%	▲ 5.0%
NEW AMSTERDAM	GALLO	4.8%	▲ 3.5%
GREY GOOSE	BACARDÍ	9.7%	▲ 3.4%
VAN GOGH	CONECUH BRANDS	1.3%	▲ 0.6%

 **Vodka Nationally: Trending Down**  
Q4 2025 vs. Q3 2025

BRAND	SUPPLIER	MENU SHARE*	%Δ IN MENU SHARE**
KETEL ONE	DIAGEO	15%	▼ 7.9%
SMIRNOFF	DIAGEO	11%	▼ 8.2%
STOLI	STOLI GROUP	9.4%	▼ 8.3%
THREE OLIVES	PROXIMO	4.2%	▼ 9.0%
PINNACLE	SUNTORY	2.3%	▼ 11%
360 VODKA	MCCORMICK DISTILLING COMPANY <small>BORN 1856 WITH THE PONY EXPRESS</small>	1.3%	▼ 12%
CÎROC	DIAGEO	2.8%	▼ 22%
SKYY	CAMPARI	2.0%	▼ 23%

\*Menu Share is the number of menus with a cocktail featuring that brand divided by the number of menus with a Vodka cocktail.

\*\*For example, ▲100% would mean that brand's Menu Share doubled (e.g., went from 2.3% to 4.6%, or from 10% to 20%), not necessarily that the brand appears on twice as many cocktail menus.



Bloody Mary is the most popular Vodka cocktail in independent accounts nationally, appearing on 36.6% of menus with at least one Vodka cocktail. Margarita grew the most over that period, gaining 8.1% Menu Share.



### Top Vodka Cocktails

COCKTAIL	MENU SHARE*	%Δ IN MENU SHARE**
<b>BLOODY MARY</b>	37%	▼ 0.2%
<b>MULE</b>	31%	▼ 5.5%
<b>MARTINI</b>	27%	▼ 2.2%
<b>ESPRESSO MARTINI</b>	26%	▲ 1.3%
<b>LEMON DROP MARTINI</b>	16%	▼ 9.3%
<b>COSMOPOLITAN</b>	14%	▼ 0.6%
<b>LONG ISLAND ICED TEA</b>	10%	▼ 0.6%

### Trending Vodka Cocktails

COCKTAIL	MENU SHARE*	%Δ IN MENU SHARE**
<b>MARGARITA</b>	2.5%	▲ 8.1%
<b>GREYHOUND</b>	1.5%	▲ 3.6%
<b>WHITE RUSSIAN</b>	5.0%	▲ 2.4%
<b>S*X ON THE BEACH</b>	4.3%	▲ 1.6%
<b>SCREWDRIVER</b>	5.2%	▲ 1.5%
<b>ESPRESSO MARTINI</b>	26%	▲ 1.3%
<b>SMASH</b>	2.8%	▲ 0.6%

\*Menu Share is the number of menus with a cocktail featuring that brand divided by the number of menus with a Vodka cocktail.

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\*\*For example, ▲100% would mean that brand's Menu Share doubled (e.g., went from 2.3% to 4.6%, or from 10% to 20%), not necessarily that the brand appears on twice as many cocktail menus.





# TEQUILA MENU PERFORMANCE

NATIONAL INDEPENDENT SPORTS BARS

Q4 2025 vs. Q3 2025



Ground Signal calculates menu share for each Tequila brand by taking the number of menus featuring a cocktail with that brand, then dividing that number by the total number of menus that have at least one Tequila cocktail.



**Tequila Cocktail Menu Share**  
 December 2025

For example: Milagro is the 9th-ranked Tequila brand on independent National cocktail menus, appearing on 4.5% of cocktail menus that have at least one Tequila cocktail.

RANK	BRAND	SUPPLIER	MENU SHARE
1	PATRÓN	BACARDÍ	12%
2	DON JULIO	DIAGEO	9.5%
3	CASAMIGOS	DIAGEO	8.9%
4	JOSE CUERVO	PROXIMO	7.5%
5 ▲1	ESPOLÓN	CAMPARI	6.0%
5 ▲1	HORNITOS	SUNTORY	6.0%
7 ▼2	1800	PROXIMO	5.9%
8	TEREMANA	TEREMANA Jägermeister	4.6%

RANK	BRAND	SUPPLIER	MENU SHARE
9	MILAGRO	WILLIAM GRANT & SONS <small>INDEPENDENT FAMILY DISTILLERS SINCE 1887</small>	4.5%
10	EL JIMADOR	BROWN-FORMAN	4.0%
11 ▲1	21 SEEDS	DIAGEO	3.8%
11 ▲3	CAZADORES	BACARDÍ	3.8%
13 ▼2	OLMECA ALTOS	Pernod Ricard	3.7%
14 ▼1	TANTEO	Tanteo®	3.6%
15	HERRADURA	BROWN-FORMAN	3.3%
16	CORAZÓN	SAZERAC	3.2%

By retrieving and analyzing all on-premise venues nationally each month, Ground Signal can show which brands are having a moment — and which are lagging behind their peers. (Limited to the 27 Tequila brands with at least 1.0% Menu Share nationally.)



 **Tequila Nationally: Trending Up**  
Q4 2025 vs. Q3 2025

BRAND	SUPPLIER	MENU SHARE*	%Δ IN MENU SHARE**
SAUZA	 SUNTORY	2.6%	▲ 29%
LALO	 TITO'S LALO TEQUILA	1.3%	▲ 26%
CÓDIGO 1530	 Pernod Ricard	1.5%	▲ 17%
DULCE VIDA	 MILESTONE	2.1%	▲ 13%
ASTRAL	 DIAGEO	1.2%	▲ 11%
CAZADORES	 BACARDÍ	3.8%	▲ 10%
GHOST	 M-S WALKER VALUE BRANDS	2.9%	▲ 9.0%
MILAGRO	 WILLIAM GRANT & SONS INDEPENDENT FAMILY DISTILLERS SINCE 1867	4.5%	▲ 5.0%

 **Tequila Nationally: Trending Down**  
Q4 2025 vs. Q3 2025

BRAND	SUPPLIER	MENU SHARE*	%Δ IN MENU SHARE**
PATRÓN	 BACARDÍ	12%	▼ 2.3%
LUNAZUL	 HEAVEN HILL BRANDS	3.1%	▼ 3.4%
EL JIMADOR	 BROWN-FORMAN	4.0%	▼ 3.6%
1800	 PROXIMO	5.9%	▼ 3.6%
DON JULIO	 DIAGEO	9.5%	▼ 4.8%
TRES AGAVES	 TRINCHERO FAMILY WINE AND SPIRITS	1.3%	▼ 6.1%
CASAMIGOS	 DIAGEO	8.9%	▼ 8.2%
MAESTRO DOBEL	 PROXIMO	1.3%	▼ 30%

\*Menu Share is the number of menus with a cocktail featuring that brand divided by the number of menus with a Tequila cocktail.

\*\*For example, ▲100% would mean that brand's Menu Share doubled (e.g., went from 2.3% to 4.6%, or from 10% to 20%), not necessarily that the brand appears on twice as many cocktail menus.



Margarita is the most popular Tequila cocktail in independent accounts nationally, appearing on 75.1% of menus with at least one Tequila cocktail. Espresso Martini grew the most over that period, gaining 77.4% Menu Share.



### Top Tequila Cocktails

COCKTAIL	MENU SHARE*	%Δ IN MENU SHARE**
MARGARITA	75%	▼ 0.6%
PALOMA	21%	▼ 1.7%
SPICY MARGARITA	11%	▲ 2.8%
RANCH WATER	5.8%	▲ 0.5%
MULE	5.1%	▼ 7.1%
FROZEN MARGARITA	4.6%	▼ 7.9%
SKINNY MARGARITA	3.7%	▲ 4.3%

### Trending Tequila Cocktails

COCKTAIL	MENU SHARE*	%Δ IN MENU SHARE**
ESPRESSO MARTINI	2.2%	▲ 77%
MARTINI	2.0%	▲ 65%
BLOODY MARY	3.0%	▲ 8.8%
OLD FASHIONED	1.1%	▲ 6.2%
FRUIT-FLAVORED MARGARITA	3.5%	▲ 4.5%
SKINNY MARGARITA	3.7%	▲ 4.3%
SPICY MARGARITA	11%	▲ 2.8%

\*Menu Share is the number of menus with a cocktail featuring that brand divided by the number of menus with a Tequila cocktail.

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\*\*For example, ▲100% would mean that brand's Menu Share doubled (e.g., went from 2.3% to 4.6%, or from 10% to 20%), not necessarily that the brand appears on twice as many cocktail menus.





# RUM

# MENU PERFORMANCE

NATIONAL INDEPENDENT SPORTS BARS

Q4 2025 vs. Q3 2025



Ground Signal calculates menu share for each Rum brand by taking the number of menus featuring a cocktail with that brand, then dividing that number by the total number of menus that have at least one Rum cocktail.



**Rum Cocktail Menu Share**  
 December 2025

For example: Sailor Jerry is the 9th-ranked Rum brand on independent National cocktail menus, appearing on 2.0% of cocktail menus that have at least one Rum cocktail.

RANK	BRAND	SUPPLIER	MENU SHARE
1	BACARDÍ	BACARDÍ	31%
2	MALIBU	Pernod Ricard	31%
3	CAPTAIN MORGAN	DIAGEO	21%
4	GOSLING'S	Pernod Ricard	5.7%
5 ▼ <sup>1</sup>	MYERS'S	SAZERAC	5.2%
6	CRUZAN	SUNTORY	4.8%
7	DON Q	SERRAVALLO'S	2.9%
8	THE KRAKEN	PROXIMO	2.2%

RANK	BRAND	SUPPLIER	MENU SHARE
9 ▲ <sup>1</sup>	SAILOR JERRY	WILLIAM GRANT & SONS <small>INDEPENDENT FAMILY DISTILLERS SINCE 1867</small>	2.0%
10 ▼ <sup>1</sup>	PARROT BAY	SAZERAC	1.9%
11	DIPLOMÀTICO	BROWN-FORMAN	1.2%
11 ▲ <sup>1</sup>	APPLETON	CAMPARI	1.2%
13	BUMBU	SOVEREIGN BRANDS	1.0%
14 ▲ <sup>1</sup>	CALYPSO	SAZERAC	0.8%
15 ▼ <sup>1</sup>	PLANTERAY		0.7%
15 ▲ <sup>2</sup>	CALICO JACK	SUNTORY	0.7%

By retrieving and analyzing all on-premise venues nationally each month, Ground Signal can show which brands are having a moment — and which are lagging behind their peers. (Limited to the 13 Rum brands with at least 1.0% Menu Share nationally.)



 **Rum Nationally: Trending Up**  
Q4 2025 vs. Q3 2025

BRAND	SUPPLIER	MENU SHARE*	%Δ IN MENU SHARE**
SAILOR JERRY	WILLIAM GRANT & SONS <small>INDEPENDENT FAMILY DISTILLERS SINCE 1847</small>	2.0%	▲ 5.5%
DON Q		2.9%	▲ 2.2%
CAPTAIN MORGAN	DIAGEO	21%	▲ 0.1%

 **Rum Nationally: Trending Down**  
Q4 2025 vs. Q3 2025

BRAND	SUPPLIER	MENU SHARE*	%Δ IN MENU SHARE**
APPLETON	CAMPARI	1.2%	▼ 2.9%
PARROT BAY	SAZERAC	1.9%	▼ 4.1%
THE KRAKEN	 PROXIMO	2.2%	▼ 5.8%
BACARDÍ	 BACARDÍ	31%	▼ 6.0%
DIPLOMÀTICO	 BROWN-FORMAN	1.2%	▼ 7.5%
GOSLING'S	 Pernod Ricard	5.7%	▼ 9.6%
BUMBU	SOVEREIGN BRANDS	1.0%	▼ 14%
MYERS'S	SAZERAC	5.2%	▼ 17%

\*Menu Share is the number of menus with a cocktail featuring that brand divided by the number of menus with a Rum cocktail.

\*\*For example, ▲100% would mean that brand's Menu Share doubled (e.g., went from 2.3% to 4.6%, or from 10% to 20%), not necessarily that the brand appears on twice as many cocktail menus.

Mojito is the most popular Rum cocktail in independent accounts nationally, appearing on 26.9% of menus with at least one Rum cocktail. Old Fashioned grew the most over that period, gaining 88.8% Menu Share.



### Top Rum Cocktails

COCKTAIL	MENU SHARE*	%Δ IN MENU SHARE**
MOJITO	27%	▼ 6.8%
PIÑA COLADA	12%	▼ 13%
MAI TAI	9.7%	▼ 20%
DAIQUIRI	7.7%	▲ 0.6%
MULE	6.2%	▲ 2.2%
MARTINI	6.1%	▲ 3.3%
HURRICANE	6.0%	▼ 9.1%

### Trending Rum Cocktails

COCKTAIL	MENU SHARE*	%Δ IN MENU SHARE**
OLD FASHIONED	1.5%	▲ 89%
SMASH	1.6%	▲ 28%
SUNRISE	1.2%	▲ 7.9%
PAINKILLER	2.3%	▲ 5.1%
MARTINI	6.1%	▲ 3.3%
MULE	6.2%	▲ 2.2%
ADIOS	1.1%	▲ 2.2%

\*Menu Share is the number of menus with a cocktail featuring that brand divided by the number of menus with a Rum cocktail.

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\*\*For example, ▲100% would mean that brand's Menu Share doubled (e.g., went from 2.3% to 4.6%, or from 10% to 20%), not necessarily that the brand appears on twice as many cocktail menus.





# GIN

# MENU PERFORMANCE

NATIONAL INDEPENDENT SPORTS BARS

Q4 2025 vs. Q3 2025



Ground Signal calculates menu share for each Gin brand by taking the number of menus featuring a cocktail with that brand, then dividing that number by the total number of menus that have at least one Gin cocktail.



**Gin Cocktail Menu Share**  
 December 2025

For example: Gray Whale is the 9th-ranked Gin brand on independent National cocktail menus, appearing on 1.8% of cocktail menus that have at least one Gin cocktail.

RANK	BRAND	SUPPLIER	MENU SHARE
1 ▲1	<b>HENDRICK'S</b>	WILLIAM GRANT & SONS <small>INDEPENDENT FAMILY DISTILLERS SINCE 1840</small>	13%
2 ▼1	<b>TANQUERAY</b>	<b>DIAGEO</b>	12%
3	<b>BOMBAY</b>	<b>BACARDÍ</b>	9.4%
4	<b>EMPRESS 1908</b>	<b>MILESTONE</b>	7.8%
5 ▲1	<b>BULLDOG</b>	<b>CAMPARI</b>	3.4%
6 ▼1	<b>BEEFEATER</b>	Pernod Ricard	2.9%
7 ▲1	<b>FORDS GIN</b>	<b>BROWN-FORMAN</b>	2.4%
8 ▲2	<b>THE BOTANIST</b>	<b>RÉMY COINTREAU</b>	1.9%

RANK	BRAND	SUPPLIER	MENU SHARE
9 ▲2	<b>GRAY WHALE</b>	<b>DEUTSCH FAMILY</b> <small>GIN &amp; SPIRITS</small>	1.8%
10 ▼2	<b>AVIATION</b>	<b>DIAGEO</b>	1.8%
11 ▼4	<b>NOLET'S</b>	<b>NOLET'S</b> <small>FINEST GINS</small>	1.6%
12	<b>MALFY</b>	Pernod Ricard	1.4%
13 ▲1	<b>ROKU</b>	<b>SUNTORY</b>	1.1%
14 ▼1	<b>SIPSMITH</b>	<b>SUNTORY</b>	0.7%
15 ▲1	<b>BLUECOAT</b>	<b>HEAVEN HILL</b> <small>BRANDS</small>	0.6%
16 ▼1	<b>DRUMSHANBO</b>	<b>PALM BAY</b> <small>INTERNATIONAL</small>	0.5%



By retrieving and analyzing all on-premise venues nationally each month, Ground Signal can show which brands are having a moment — and which are lagging behind their peers. (Limited to the 13 Gin brands with at least 1.0% Menu Share nationally.)



 **Gin Nationally: Trending Up**  
Q4 2025 vs. Q3 2025

BRAND	SUPPLIER	MENU SHARE*	%Δ IN MENU SHARE**
ROKU	 SUNTORY	1.1%	▲ 35%
GRAY WHALE	 DEUTSCH FAMILY WINE & SPIRITS	1.8%	▲ 28%
MALFY	 Pernod Ricard	1.4%	▲ 28%
FORDS GIN	 BROWN-FORMAN	2.4%	▲ 22%
THE BOTANIST	 RÉMY COINTREAU	1.9%	▲ 20%
BULLDOG	 CAMPARI	3.4%	▲ 12%
EMPRESS 1908	 MILESTONE	7.8%	▲ 1.4%

 **Gin Nationally: Trending Down**  
Q4 2025 vs. Q3 2025

BRAND	SUPPLIER	MENU SHARE*	%Δ IN MENU SHARE**
HENDRICK'S	 WILLIAM GRANT & SONS <small>INDEPENDENT FAMILY DISTILLERS SINCE 1847</small>	13%	▼ 4.1%
BOMBAY	 BACARDÍ	9.4%	▼ 5.2%
BEEFEATER	 Pernod Ricard	2.9%	▼ 7.5%
AVIATION	 DIAGEO	1.8%	▼ 9.8%
TANQUERAY	 DIAGEO	12%	▼ 10%
NOLET'S	 NOLET'S <small>FINEST GINS</small>	1.6%	▼ 22%

\*Menu Share is the number of menus with a cocktail featuring that brand divided by the number of menus with a Gin cocktail.

\*\*For example, ▲100% would mean that brand's Menu Share doubled (e.g., went from 2.3% to 4.6%, or from 10% to 20%), not necessarily that the brand appears on twice as many cocktail menus.

Martini is the most popular Gin cocktail in independent accounts nationally, appearing on 10% of menus with at least one Gin cocktail. Last Word grew the most over that period, gaining 24.4% Menu Share.



### Top Gin Cocktails

COCKTAIL	MENU SHARE*	%Δ IN MENU SHARE**
MARTINI	10%	▼ 10%
NEGRONI	8.5%	▲ 3.7%
FRENCH 75	6.2%	▲ 6.7%
LONG ISLAND ICED TEA	4.9%	▼ 4.8%
AVIATION	4.3%	▼ 9.3%
MULE	3.8%	▼ 7.1%
BEE'S KNEES	3.4%	▲ 6.4%

### Trending Gin Cocktails

COCKTAIL	MENU SHARE*	%Δ IN MENU SHARE**
LAST WORD	1.1%	▲ 24%
SPRITZ	2.3%	▲ 17%
SMASH	1.8%	▲ 15%
GIN FIZZ	2.3%	▲ 12%
FRENCH 75	6.2%	▲ 6.7%
BEE'S KNEES	3.4%	▲ 6.4%
NEGRONI	8.5%	▲ 3.7%

\*Menu Share is the number of menus with a cocktail featuring that brand divided by the number of menus with a Gin cocktail.

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\*\*For example, ▲100% would mean that brand's Menu Share doubled (e.g., went from 2.3% to 4.6%, or from 10% to 20%), not necessarily that the brand appears on twice as many cocktail menus.





# WHISKEY MENU PERFORMANCE

NATIONAL INDEPENDENT SPORTS BARS

Q4 2025 vs. Q3 2025



Ground Signal calculates menu share for each Whiskey brand by taking the number of menus featuring a cocktail with that brand, then dividing that number by the total number of menus that have at least one Whiskey cocktail.



**Whiskey Cocktail Menu Share**  
 December 2025

For example: Skrewball is the 9th-ranked Whiskey brand on independent National cocktail menus, appearing on 6.1% of cocktail menus that have at least one Whiskey cocktail.

RANK	BRAND	SUPPLIER	MENU SHARE
1	JAMESON	Pernod Ricard	23%
2	BULLEIT	DIAGEO	15%
3 ▲1	JACK DANIEL'S	BROWN-FORMAN	14%
4 ▼1	CROWN ROYAL	DIAGEO	11%
5	MAKER'S MARK	SUNTORY	11%
6	FIREBALL	SAZERAC	9.6%
7	JIM BEAM	SUNTORY	7.6%
8	BUFFALO TRACE	SAZERAC	7.5%

RANK	BRAND	SUPPLIER	MENU SHARE
9	SKREWBALL	Pernod Ricard	6.1%
10	WOODFORD RESERVE	BROWN-FORMAN	5.8%
11	SOUTHERN COMFORT	SAZERAC	4.4%
12 ▲2	KNOB CREEK	SUNTORY	3.3%
13 ▼1	OLD FORESTER	BROWN-FORMAN	3.0%
14 ▼1	TULLAMORE DEW	WILLIAM GRANT & SONS <small>INDEPENDENT FAMILY DISTILLERS SINCE 1867</small>	2.9%
15	FOUR ROSES	KIRIN	2.5%
16	ELIJAH CRAIG	HEAVEN HILL <small>BRANDS</small>	2.3%

By retrieving and analyzing all on-premise venues nationally each month, Ground Signal can show which brands are having a moment — and which are lagging behind their peers. (Limited to the 26 Whiskey brands with at least 1.0% Menu Share nationally.)



 **Whiskey Nationally: Trending Up**  
Q4 2025 vs. Q3 2025

BRAND	SUPPLIER	MENU SHARE*	%Δ IN MENU SHARE**
ANGEL'S ENVY	 BACARDÍ	1.4%	▲ 35%
MICHTER'S	 CHATHAM IMPORTS, INC.	1.0%	▲ 27%
WHISTLEPIG	 WHISTLEPIG	1.6%	▲ 15%
BUFFALO TRACE	SAZERAC	7.5%	▲ 12%
FIREBALL	SAZERAC	9.6%	▲ 7.5%
JACK DANIEL'S	 BROWN-FORMAN	14%	▲ 5.5%
SAZERAC RYE	SAZERAC	1.4%	▲ 4.3%
ELIJAH CRAIG	 HEAVEN HILL BRANDS	2.3%	▲ 2.7%

 **Whiskey Nationally: Trending Down**  
Q4 2025 vs. Q3 2025

BRAND	SUPPLIER	MENU SHARE*	%Δ IN MENU SHARE**
BULLEIT	DIAGEO	15%	▼ 8.4%
JAMESON	 Pernod Ricard	23%	▼ 9.1%
CROWN ROYAL	DIAGEO	11%	▼ 14%
REDEMPTION	 DEUTSCH FAMILY WINE & SPIRITS	1.8%	▼ 15%
TULLAMORE DEW	WILLIAM GRANT & SONS <small>INDEPENDENT FAMILY DISTILLERS SINCE 1867</small>	2.9%	▼ 16%
FOUR ROSES	 KIRIN	2.5%	▼ 20%
OLD FORESTER	 BROWN-FORMAN	3.0%	▼ 22%
HIGH WEST	 Constellation Brands	1.5%	▼ 22%

\*Menu Share is the number of menus with a cocktail featuring that brand divided by the number of menus with a Whiskey cocktail.

\*\*For example, ▲100% would mean that brand's Menu Share doubled (e.g., went from 2.3% to 4.6%, or from 10% to 20%), not necessarily that the brand appears on twice as many cocktail menus.



Old Fashioned is the most popular Whiskey cocktail in independent accounts nationally, appearing on 45.2% of menus with at least one Whiskey cocktail. Black Velvet grew the most over that period, gaining 251.1% Menu Share.



**Top Whiskey Cocktails**

COCKTAIL	MENU SHARE*	%Δ IN MENU SHARE**
<b>OLD FASHIONED</b>	45%	▼ 3.0%
<b>MULE</b>	14%	▲ 0.7%
<b>MANHATTAN</b>	13%	▼ 1.3%
<b>IRISH COFFEE</b>	8.3%	▼ 0.3%
<b>VEGAS BOMB SHOT</b>	5.5%	▼ 6.9%
<b>SMASH</b>	5.3%	▲ 3.4%
<b>MARTINI</b>	4.9%	▲ 13%

**Trending Whiskey Cocktails**

COCKTAIL	MENU SHARE*	%Δ IN MENU SHARE**
<b>BLACK VELVET</b>	1.1%	▲ 251%
<b>MAPLE OLD FASHIONED</b>	2.7%	▲ 60%
<b>SANGRIA</b>	1.0%	▲ 36%
<b>BOULEVARDIER</b>	1.1%	▲ 34%
<b>HOT TODDY</b>	1.9%	▲ 25%
<b>MARTINI</b>	4.9%	▲ 13%
<b>ESPRESSO MARTINI</b>	1.9%	▲ 9.7%

\*Menu Share is the number of menus with a cocktail featuring that brand divided by the number of menus with a Whiskey cocktail.

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# LIQUEUR MENU PERFORMANCE

NATIONAL INDEPENDENT SPORTS BARS

Q4 2025 vs. Q3 2025



Ground Signal calculates menu share for each Liqueur brand by taking the number of menus featuring a cocktail with that brand, then dividing that number by the total number of menus that have at least one Liqueur cocktail.



**Liqueur Cocktail Menu Share**  
 December 2025

For example: Mr Black is the 9th-ranked Liqueur brand on independent National cocktail menus, appearing on 6.9% of cocktail menus that have at least one Liqueur cocktail.

RANK	BRAND	SUPPLIER	MENU SHARE
1	KAHLUA	Pernod Ricard	23%
2	BAILEYS	DIAGEO	18%
3 ▼ <sup>1</sup>	GRAND MARNIER	CAMPARI	18%
4	COINTREAU	RÉMY COINTREAU	17%
5 ▲ <sup>1</sup>	DE KUYPER	SUNTORY	14%
6 ▼ <sup>1</sup>	ST. GERMAIN	BACARDÍ	13%
7 ▲ <sup>1</sup>	CHAMBORD	BROWN-FORMAN	8.0%
8 ▼ <sup>1</sup>	JAGERMEISTER	Jägermeister	7.7%

RANK	BRAND	SUPPLIER	MENU SHARE
9	MR BLACK	DIAGEO	6.9%
10 ▲ <sup>1</sup>	RUM CHATA	GALLO	6.1%
11 ▼ <sup>1</sup>	FRANGELICO	CAMPARI	5.4%
12 ▲ <sup>1</sup>	MIDORI	SUNTORY	4.2%
13 ▼ <sup>1</sup>	LICOR 43	Zamora company	4.1%
14	BORGHETTI	BRANCA	3.1%
15 ▲ <sup>2</sup>	LUXARDO	HOTALING & CO. IMPORTER-DISTILLER	2.9%
16	PAMA	HEAVEN HILL BRANDS	2.8%

By retrieving and analyzing all on-premise venues nationally each month, Ground Signal can show which brands are having a moment — and which are lagging behind their peers. (Limited to the 23 Liqueur brands with at least 1.0% Menu Share nationally.)



 **Liqueur Nationally: Trending Up**  
Q4 2025 vs. Q3 2025

BRAND	SUPPLIER	MENU SHARE*	%Δ IN MENU SHARE**
DISARONNO	 ILVA SARONNO	2.2%	▲ 18%
MR BLACK	 DIAGEO	6.9%	▲ 15%
RUM CHATA	 GALLO	6.1%	▲ 15%
TUACA	 SAZERAC	1.1%	▲ 12%
LUXARDO	 <b>HOTALING &amp; CO.</b> IMPORTER - DISTILLER	2.9%	▲ 4.9%
GRAN GALA	 SAZERAC	1.7%	▲ 4.3%
KAHLUA	 Pernod Ricard	23%	▲ 1.5%
COINTREAU	 <b>RC</b> RÉMY COINTREAU	17%	▲ 0.7%

 **Liqueur Nationally: Trending Down**  
Q4 2025 vs. Q3 2025

BRAND	SUPPLIER	MENU SHARE*	%Δ IN MENU SHARE**
ANCHO REYES	 <b>CAMPARI.</b>	2.7%	▼ 6.3%
FRANGELICO	 <b>CAMPARI.</b>	5.4%	▼ 7.2%
LICOR 43	 <i>Zamora</i> company	4.1%	▼ 7.3%
JAGERMEISTER	 <b>Jägermeister</b>	7.7%	▼ 11%
ST. GERMAIN	 <b>BACARDÍ.</b>	13%	▼ 15%
CHARTREUSE	 <b>FREDERICK WILDMAN</b> AND SONS, LTD. FINE RECHANGÉS	1.4%	▼ 17%
GODIVA	 <b>DIAGEO</b>	1.5%	▼ 19%
GIFFARD	 <b>BACK BAR</b> PROJECT	1.1%	▼ 24%

\*Menu Share is the number of menus with a cocktail featuring that brand divided by the number of menus with a Liqueur cocktail.

\*\*For example, ▲100% would mean that brand's Menu Share doubled (e.g., went from 2.3% to 4.6%, or from 10% to 20%), not necessarily that the brand appears on twice as many cocktail menus.

Margarita is the most popular Liqueur cocktail in independent accounts nationally, appearing on 44.9% of menus with at least one Liqueur cocktail. Fruit-Flavored Margarita grew the most over that period, gaining 31.4% Menu Share.



### Top Liqueur Cocktails

COCKTAIL	MENU SHARE*	%Δ IN MENU SHARE**
MARGARITA	45%	▼ 1.2%
ESPRESSO MARTINI	24%	▲ 6.9%
MARTINI	22%	▲ 1.8%
COSMOPOLITAN	11%	▼ 4.3%
SANGRIA	8.1%	▼ 0.3%
LEMON DROP MARTINI	7.6%	▼ 7.9%
SPICY MARGARITA	6.5%	▼ 1.4%

### Trending Liqueur Cocktails

COCKTAIL	MENU SHARE*	%Δ IN MENU SHARE**
FRUIT-FLAVORED MARGARITA	2.1%	▲ 31%
WHITE RUSSIAN	4.0%	▲ 18%
TIKI	1.0%	▲ 13%
MULE	6.5%	▲ 10%
ESPRESSO MARTINI	24%	▲ 6.9%
HUGO SPRITZ	2.1%	▲ 6.4%
AMARETTO SOUR	2.2%	▲ 6.2%

\*Menu Share is the number of menus with a cocktail featuring that brand divided by the number of menus with a Liqueur cocktail.

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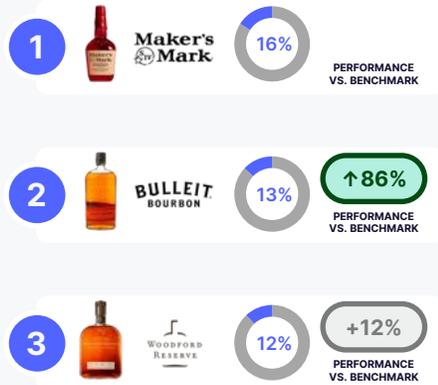
\*\*For example, ▲100% would mean that brand's Menu Share doubled (e.g., went from 2.3% to 4.6%, or from 10% to 20%), not necessarily that the brand appears on twice as many cocktail menus.



In addition to analyzing menu statistics by geography, Ground Signal also allows you see menu performance by:

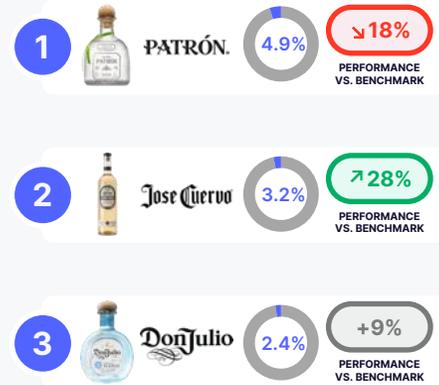
## Venue Profile

Example: Top 3 Whiskey Brands in Independent Steak Houses



## Cocktails

Example: Top 3 Tequila Brands Used in Margaritas Nationwide



## Chains vs. Independent Accounts

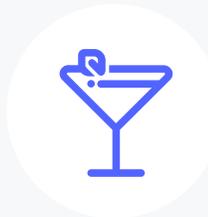
Example:

Top Brands in Chain Accts

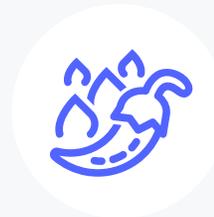
Top Brands in Independent Accts



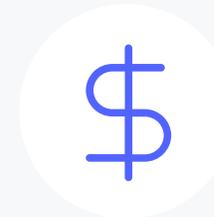
Ground Signal can also provide insights into:



**Popular cocktails & their variants**  
e.g. Tequila Espresso Martini



**Flavor Profiles**



**Pricing**

