

# NATIONAL CHAIN DINING

Multicultural Consumer Insights



GROUND SIGNAL



# NOT ALL CHAIN LOCATIONS ARE CREATED EQUAL

On-premise consumers are not a monolith. Even within a single national account, consumer profiles can **vary significantly by location** — and **multicultural**-skewing locations within the **largest dining chains** outperform their non-multicultural counterparts by **+63%** on spirits volume. This report uses Ground Signal's **unparalleled visibility** into consumer behavior to show you exactly who is driving that volume — across five dimensions: **who** they are, what **occasions** bring them in, what they want to **drink**, what's on the **menu** at comparable locations, and what the commercial data says about the **size of the prize**.

In the pages that follow, we'll explore:



Consumer demographics and psychographic analysis



Analysis of social data to identify key on-premise drivers shaping consumer purchase behavior



Menu analytics demonstrating the brands and cocktails winning the battle for share of wallet



Depletion analysis validating the opportunity



# How we built this dataset

To understand what truly drives On-Premise consumption at national dining accounts that are most popular with multicultural consumers, we leveraged the power of Ground Signal's Venue Level intelligence

Together, these analyses reveal the **consumer profile**, **behavioral patterns**, **menu** dynamics, and **commercial performance** across multicultural locations within the largest national dining chains.

Here's how we approached it:

## STEP 1

We identified all **chain** restaurant locations that serve alcohol and cross-referenced them against Ground Signal's **consumer behavior data** to identify locations where consumers over-index for **multicultural** identity — defined as any consumer who self-identifies as a race or ethnicity other than non-Hispanic White.

## STEP 2

From that universe, we identified the **20 chains** with the highest concentration of multicultural-skewing locations. All analysis is focused exclusively on those **specific locations** — not each chain's full footprint.

## STEP 3

We analyzed **consumer** behavior, **occasion** data, **menu** analytics, and commercial **depletion** data across 2,500 chain accounts to build a **complete picture** of who this consumer is and what drives their spending.



**THE CONSUMER**

# Who is the Multicultural Consumer in National Chain Dining?

Black American consumers over-index by +166% at these locations vs. all US on-premise accounts. Hispanic consumers over-index by +71%. Two details stand out beyond the cultural affinity numbers: this consumer skews over 40 — not the young emerging demographic the industry often assumes — and they skew average-income.

## Multicultural Chain Dining Consumers skew:

Compared to On-Premise consumers generally.

Black	Hispanic	41-50	50+	Average Income
▲166%	▲71%	▲2.9%	▲8.7%	▲8.7%



# What are the Multicultural National Chain Dining Consumer's interests?

These are social, family-first consumers who show up for the people in their lives — Parenting at 2.4x and Comedy at 2.6x point to someone who values shared experiences and good times. Rap Music at 2.3x reflects a strong cultural identity. Fashion & Beauty and Fitness & Wellness round out a consumer who takes pride in how they present themselves.

## Multicultural Chain Dining Consumers over-index for interests in:

Compared to All On-Premise Consumers (AOPC).



COMEDY

+2.6x



PARENTING

+2.4x



RAP MUSIC

+2.3x



DEALS & COUPONING

+2.3x



FITNESS & WELLNESS

+1.2x








FASHION & BEAUTY

+1.2x

# Expected brands dominate — with some interesting outliers

Traditionally Multicultural focused brands like Crown Royal, Hennessy, Cîroc, and Patrón lead their respective categories by wide margins. However less expected brands like Buchanan's Scotch at 4.0x outperforms most Whiskey brands and Roku Gin registers 5.5x — the highest in its category by far. Caribbean Rum brands Wray & Nephew (8.0x) and Brugal (6.4x) show unexpected outsized affinity that.

## Multicultural Chain Dining Consumers spirit brand affinity:

<p>Whiskey</p>  <p><b>+6.2x</b></p>	<p>Cognac</p> <p><b>Hennessy</b></p> <p><b>+5.9x</b></p>	<p>Vodka</p> <p><b>CÎROC</b></p> <p><b>+5.7x</b></p>
<p>Tequila</p>  <p><b>+5.6x</b></p>	<p>Rum</p>  <p><b>+2.9x</b></p>	<p>Scotch</p>  <p><b>+4.0x</b></p>
<p>Gin</p>  <p><b>+5.5x</b></p>		







# ON-PREMISE DRIVERS





# Why do customers frequent Multicultural Chain Dining venues?

Multicultural consumers visit chain restaurants primarily to celebrate — Birthday dominates at 55% mention share, with Date Night, Anniversary, and Mother's Day all over-indexing strongly. These aren't casual visits, they are intentional, occasion-driven moments. Intimate milestones like birthdays, anniversaries, and Mother's Day have seen the fastest growth, pointing to a consumer increasingly visiting chain restaurants to mark meaningful moments with the people closest to them.

Top Multicultural Chain Dining Occasions:

	Birthday	▲ 229%
	Date Night	▲ 123%
	Anniversary	▲ 51%
	Mother's Day	▲ 107%






Trending Multicultural Chain Dining Occasions:

	Birthday	▲ 62%
	Date Night	▲ 103%
	Mother's Day	▲ 84%
	Anniversary	▲ 16%






# What environments are leading the way in Multicultural Chain Dining venues?

Cocktails dominate venue mentions at 32% and Drink Specials at 9% — the latter consistent with the value-conscious behavior seen in the consumer interest data. But the trending data tells the more interesting story. These consumers aren't just dining — they are increasingly seeking out elevated, experience-led moments that are worth marking and sharing.

Top Multicultural Chain Dining Environments:

	Cocktails	▲ 14%
	Drink Specials	▲ 28%
	Beach	▲ 33%
	Spirit Flights	▲ 280%
	Fine Dining	▲ 509%

Trending Multicultural Chain Dining Environments:

	Spirit Flights	▲ 95%
	Fine Dining	▲ 78%
	Karaoke	▲ 81%
	Drink Specials	▲ 41%
	Live Music	▲ 40%






# What cocktails are most popular in Multicultural Chain Dining venues?

The Margarita is the defining cocktail at these accounts — both the classic and flavored variants over-index strongly, pointing to a consumer with a deep affinity for the category. The Lemon Drop is the standout emerging serve. Broader industry trends like the Espresso Martini, Spritz, and Mocktails also demonstrate growth, though they remain significantly less prevalent than in the on-premise population generally.

Top Multicultural Chain Dining Cocktails:

	Margarita	▲ 140%
	Martini	▲ 8%
	Sangria	▲ 110%
	Flavored Margarita	▲ 88%
	Lemon Drop	▲ 217%






Trending Multicultural Chain Dining Cocktails:

	Espresso Martini	▲ 59%
	Spritz	▲ 38%
	Mocktail	▲ 22%
	Martini	▲ 18%
	Lemon Drop	▲ 8%






# What cocktail flavors are popping in Multicultural Chain Dining venues?

Lemonade anchors the flavor story at 32% mention share and is genuinely growing at +21% over three years. Dragon Fruit is the standout emerging flavor. Berry and Raspberry round out a picture of fruit-forward flavors gaining real momentum. Espresso mirrors the broader industry trend — growing strongly at +47% but still significantly under-indexing vs. the on-premise population generally.

Top Multicultural Chain Dining Flavors:

	Lemonade	▲ 86%
	Strawberry	▲ 126%
	Watermelon	▲ 221%
	Mango	▲ 240%
	Blueberry	▲ 342%

Trending Multicultural Chain Dining Flavors:




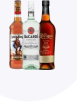

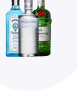
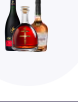
	Dragon Fruit	▲ 500%
	Berry	▲ 54%
	Espresso	▲ 47%
	Raspberry	▲ 41%
	Lemonade	▲ 21%



# MENU ANALYTICS

# What categories appear most often on Multicultural Dining menus?

Tequila leads with at least one Tequila based cocktail on menu at 75.9% of accounts, consistent with its dominance in consumer affinity data. Cognac is the most over-indexed category on menu at +28.3% vs. benchmark — suggesting menus at comparable accounts are increasingly reflecting the strong consumer demand for the category. Rum also over-indexes on both consumer affinity and menu presence. Whiskey under-indexes at -17.2% on menu, consistent with Bourbon's negative relevance factor in the consumer interest data.

Category	Menu Share	vs. Benchmark	YoY Trend
 Tequila/Agave	76%	+0.4%	+1.2%
 Vodka	66%	-9.7%	-1.5%
 Liqueurs	65%	-6.2%	-1.4%
 Rum	64%	-7.1%	-2.1%
 Whiskey	50%	↓17%	+1.0%
 Gin/Genever	45%	-4.5%	+1.1%
 Brandy/Cognac	24%	↑28%	-6.7%




# What brands appear most often on Multicultural Dining menus?

Brands with strong consumer affinity — such as Hennessy and Patrón — tend to have higher menu presence at independent multicultural dining accounts than in restaurants generally. For Rum and Whiskey, there remains an opportunity for brands with strong consumer affinity to increase their menu presence. The fastest growing brands on menu, like Maestro Dobel and Zacapa, are concentrated in premium Tequila and Rum — consistent with the strong consumer preference.

Top Independent Multicultural Dining Brands on Menu

Category	Top Brand	Menu Share	vs. Benchmark
Tequila	 PATRÓN. TEQUILA MEXICO	15%	-4.5%
Vodka	 Tito's HANDMADE VODKA	18%	↓26%
Whiskey	 Maker's Mark	5.6%	↓41%
Rum	 BACARDÍ	17%	-10%
Gin	 HENDRICK'S GIN	5.7%	↓16%
Liqueur	 APEROL 1919	20%	+0%
Cognac	 Hennessy	7.9%	↑172%

Trending Independent Multicultural Dining Brands on Menu

Category	Top Brand	Menu Share	YoY Trend
Tequila	 MAESTRO DOBEL. TEQUILA	3.1%	↑15%
Rum	 Ron Zacapa	2.0%	+11%
Tequila	 PATRÓN. TEQUILA MEXICO	15%	+8.0%
Liqueur	 ST-GERMAIN "FRUIT DE SEIZEN" LIQUEUR	16%	+7.3%
Tequila	 DonJulio	11%	+7.0%

# What cocktails appear most often on Multicultural Dining menus?

The Margarita leads menu presence at 57% of accounts but is broadly flat year on year. The more interesting story is in what's growing — the Lemon Drop Martini, Spicy Margarita, Piña Colada, and Michelada are all gaining significant ground. These are culturally specific, fruit-forward serves that reflect the consumer preference data closely. Conversely, the under-performance of the Old Fashioned and Espresso Martini on these menus aligns with the consumer data.

Top Independent Multicultural Dining Cocktails on Menu

Cocktail	Menu Share	vs. Benchmark
 Margarita	57%	-2.6%
 Sangria	32%	-12%
 Mojito	29%	↗25%
 Mimosa	25%	↗20%
 Piña Colada	20%	↑50%






Trending Independent Multicultural Dining Cocktails on Menu

Cocktail	Menu Share	YoY Trend
 Lemon Drop	9.4%	↑292%
 Piña Colada	20%	↗35%
 Spicy Margarita	8.4%	↗38%
 Michelada	18%	↗31%
 Lychee Martini	7.0%	↗30%






# What flavors appear most often on Multicultural Dining menus?

Lime, Pineapple, and Mango dominate by raw menu share but are largely flat or declining year on year. The growth story belongs to a different set of flavors — Lychee, Coffee, and Spicy are the fastest growing among flavors with meaningful menu presence. The Spicy signal is particularly consistent — appearing in both the fastest growing flavors and cocktails, pointing to a broader trend towards bold, complex flavor profiles. Despite seeing increased consumer mentions, Lemonade saw its menu share decrease slightly.

Top Independent Multicultural Dining Flavors on Menu

Flavor	Menu Share	vs. Benchmark
 Lime	63%	-5.4%
 Pineapple	56%	-5.7%
 Mango	40%	↗32%
 Passion Fruit	31%	↗41%
 Watermelon	20%	↗39%

Trending Independent Multicultural Dining Flavors on Menu

Flavor	Menu Share	YoY Trend
 Lychee	16%	↗20%
 Coffee	39%	+12%
 Spicy	39%	+8.4%
 Guava	13%	+4.9%
 Grapefruit	31%	+3.7%



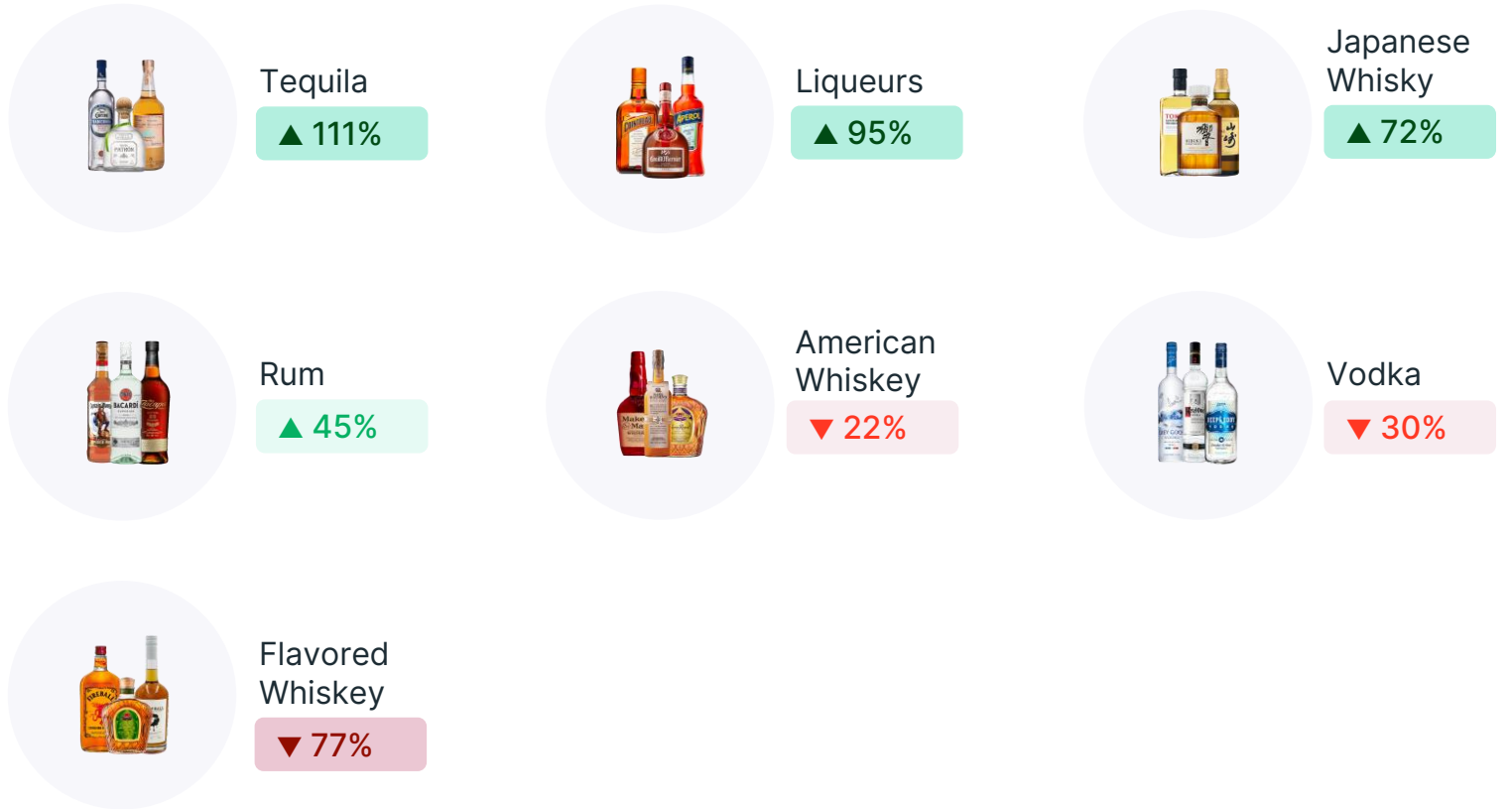
# DEPLETION ANALYSIS

## AVERAGE ACCOUNT VOLUME

# How does total spirits volume perform in Multicultural Chain Dining locations?

Multicultural chain locations over-index on spirits volume across most categories, but the spread is significant. Tequila generates +111% more account volume than the national on-premise average. Liqueurs (+95%) and Japanese Whisky (+72%) also over-index strongly, as does Traditional Rum (+45%). American Whiskey under-indexes at -22%, and Flavored Whiskey at -77% is the weakest performing category by a significant margin.

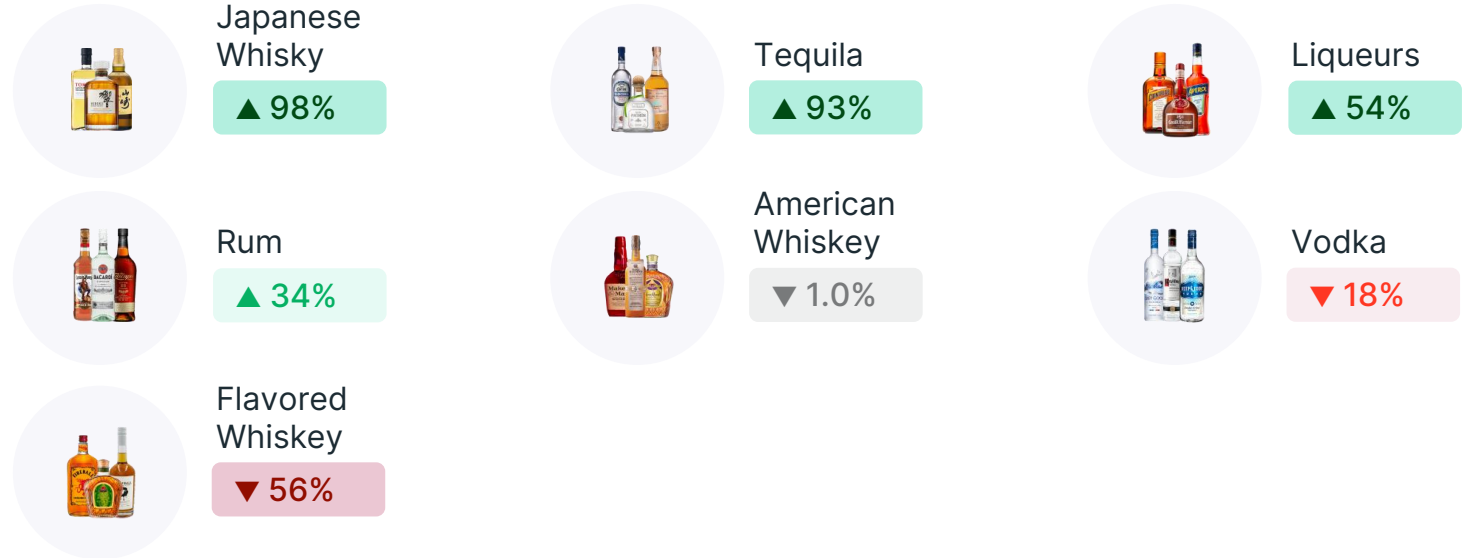
## Top Performing Categories and Tiers:



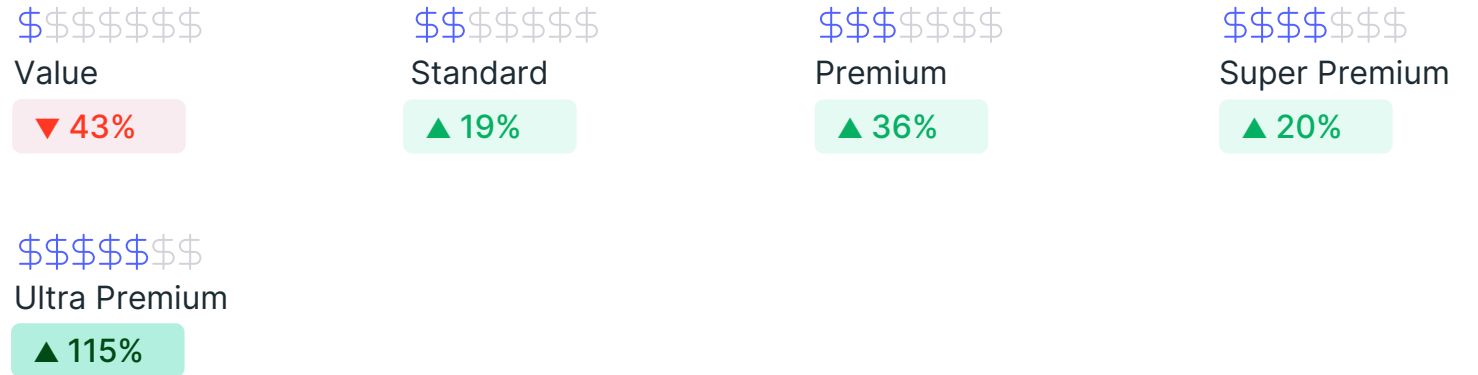
# How valuable is distribution in Multicultural Chain Dining locations?

Across all categories, average per placement volumes at multicultural chain locations runs +34% above the national benchmark. Tequila (+93%) and Liqueurs (+54%) are the strongest performers. Ultra Premium expressions consistently perform well, +115% above the national average. While this consumer shows value-conscious behavior in other areas of their life, spirits appears to be a category where they are still willing to splurge.

## Categories:



## Tiers:



# MULTICULTURAL CHAIN DINING: KEY TAKEAWAYS



**Multicultural consumers at chain locations are a distinct, well-defined audience** — with specific demographic, psychographic, and behavioral characteristics that differ meaningfully from the general chain dining consumer.



**Multicultural-skewing locations within the 20 largest dining chains significantly outperform** — both vs. the national on-premise average (+93%) and vs. non-multicultural locations within the same chains (+63%).



**The occasions are celebratory and becoming more personal** — Birthday, Date Night, Anniversary, and Mother's Day are the defining occasions and growing fastest, pointing to a consumer using these accounts to mark meaningful moments.



**Tequila is the category where consumer affinity, menu presence, and commercial performance most clearly align** — it leads on all three measures, and premium expressions are among the fastest growing brands on menu at comparable accounts.



**Cocktail preferences are fruit-forward and culturally specific** — Margarita variants dominate, and trending serves like Caipirinha and Michelada reflect cultural traditions rarely represented on mainstream chain menus.



**Flavor trends reinforce the same cultural signals** — tropical and Latin American flavors like Mango, Passionfruit, Tamarind, and Guava over-index on both consumer mentions and menu presence.



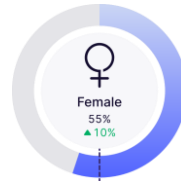
**This consumer trades up on spirits** — despite a middle-income profile, Ultra Premium placement velocity runs +115% above the national average, and Premium and Ultra Premium tiers consistently outperform across categories.

# 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.

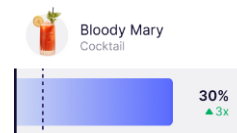
Example: #Patio #Party



## 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.

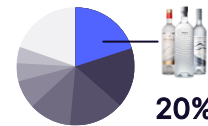
Example: Multicultural Focused High-Energy Dining



## 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%.

