

SCOTCH WHISKY INSIGHTS

NATIONAL





What are the top and trending cocktails associated with Scotch Whisky?

On-Premise Cocktail Mentions as a Proportion of Total Scotch Whisky Mentions

POWERED BY [GROUND SIGNAL.AI](#)

- High ↑
- Mid ↓
- Mid ↑
- High ↓
- Neutral +/-

Top Over-Indexing On-Premise Cocktail Mentions

For example: Consumers are 9,919% more likely to mention Penicillin when posting about Scotch Whisky than in their overall on-premise posts.

| Cocktail | Volume | Index vs. Total On-Premise* |
|----------------------|----------------------------------|-----------------------------|
| PENICILLIN | <div style="width: 100%;"></div> | ↑9919% |
| OLD FASHIONED | <div style="width: 80%;"></div> | ↑171% |
| NEGRONI | <div style="width: 60%;"></div> | ↑64% |
| HOT TODDY | <div style="width: 40%;"></div> | ↑547% |
| HIGHBALL | <div style="width: 30%;"></div> | ↑600% |

*Index compared to share of cocktail mentions nationally

Top Growing On-Premise Cocktail Mentions

For example: Martini share of Scotch Whisky cocktail mentions increased by 92% nationally over the past three years.

| Cocktail <small>Ranked by Consumer Mention</small> | 3-Year Growth** <small>(2022-2024)</small> |
|---|---|
| MARTINI | ↑92% |
| PENICILLIN | +11% |
| MARGARITA | ↗25% |
| ESPRESSO MARTINI | ↑120% |
| SPRITZ | ↗15% |

**Change in share of mentions nationally from 2022 to 2024

What are the top and trending cocktail flavors associated with Scotch Whisky?

On-Premise Cocktail Flavor Mentions as a Proportion of Total Scotch Whisky Mentions

POWERED BY [GROUND SIGNAL.AI](#)

- High ↑
- Mid ↓
- Mid ↑
- High ↓
- Neutral +/-

Top Over-Indexing On-Premise Flavor Mentions

For example: Consumers are 179% more likely to mention Orange when posting about Scotch Whisky than in their overall on-premise posts.

| Flavor | Volume | Index vs. Total On-Premise* |
|---------------|----------------------------------|-----------------------------|
| ORANGE | <div style="width: 100%;"></div> | ↑179% |
| APPLE | <div style="width: 80%;"></div> | ↑219% |
| COFFEE | <div style="width: 60%;"></div> | ↑140% |
| SMOKY | <div style="width: 40%;"></div> | ↑1111% |
| PEAR | <div style="width: 30%;"></div> | ↑104% |
| GINGER | <div style="width: 20%;"></div> | ↑208% |

*Index compared to share of flavor mentions nationally

Top Growing On-Premise Flavor Mentions

For example: Espresso share of Scotch Whisky cocktail flavor mentions increased by 56% nationally over the past three years.

| Flavor <small>Ranked by Consumer Mentions</small> | 3-Year Growth** <small>(2022-2024)</small> |
|--|---|
| ESPRESSO | ↑56% |
| APPLE | ↗18% |
| COFFEE | ↗42% |
| SMOKY | ↗27% |
| PEAR | ↗46% |
| VANILLA | ↑56% |

**Change in share of mentions nationally from 2022 to 2024





What are the top and trending occasions associated with Scotch Whisky?

On-Premise Occasion Mentions as a Proportion of Total Scotch Whisky Mentions

POWERED BY [GROUND SIGNAL.AI](#)

- High ↑
- Mid ↑
- Neutral +/-
- Mid ↓
- High ↓

Top Over-Indexing On-Premise Occasion Mentions

For example: Consumers are 66% more likely to mention Dinner when posting about Scotch Whisky than in their overall on-premise posts.

| Occasion | Volume | Index vs. Total On-Premise* |
|-------------|----------------------------------|-----------------------------|
| DINNER | <div style="width: 66%;"></div> | ↑66% |
| HAPPY HOUR | <div style="width: 191%;"></div> | ↑191% |
| LATE NIGHT | <div style="width: 93%;"></div> | ↑93% |
| ANNIVERSARY | <div style="width: 39%;"></div> | ↗39% |
| DATE NIGHT | <div style="width: 10%;"></div> | +10% |

*Index compared to share of occasion mentions nationally

Top Growing On-Premise Occasion Mentions

For example: Dinner share of Scotch Whisky occasion mentions increased by 16% nationally over the past three years.

| Occasion <small>Ranked by Consumer Mention</small> | 3-Year Growth** <small>(2022-2024)</small> |
|---|---|
| DINNER | ↗16% |
| PARTY | ↗24% |
| LUNCH | ↗48% |
| ANNIVERSARY | ↑50% |
| TRIVIA | ↑83% |

**Change in share of mentions nationally from 2022 to 2024

What are the top and trending environments associated with Scotch Whisky?

On-Premise Environment Mentions as a Proportion of Total Scotch Whisky Mentions

POWERED BY [GROUND SIGNAL.AI](#)

- High ↑
- Mid ↑
- Neutral +/-
- Mid ↓
- High ↓

Top Over-Indexing On-Premise Environment Mentions

For example: Consumers are 29% more likely to mention Patio when posting about Scotch Whisky than in their overall on-premise posts.

| Environment | Volume | Index vs. Total On-Premise* |
|---------------|----------------------------------|-----------------------------|
| PATIO | <div style="width: 29%;"></div> | ↗29% |
| TAPROOM | <div style="width: 212%;"></div> | ↑212% |
| SPEAKEASY | <div style="width: 479%;"></div> | ↑479% |
| JAZZ | <div style="width: 16%;"></div> | ↗16% |
| FINE DINING | <div style="width: 152%;"></div> | ↑152% |
| AWARD-WINNING | <div style="width: 156%;"></div> | ↑156% |

*Index compared to share of occasion mentions nationally

Top Growing On-Premise Environment Mentions

For example: Patio share of Scotch Whisky environment mentions increased by 21% nationally over the past three years.

| Environment <small>Ranked by Consumer Mentions</small> | 3-Year Growth** <small>(2022-2024)</small> |
|---|---|
| PATIO | ↗21% |
| TAPROOM | ↗46% |
| GOLF | ↗19% |
| DANCING | ↗46% |
| SPEAKEASY | +11% |
| BEACH | ↗27% |

**Change in share of mentions nationally from 2022 to 2024





Which Key Trade Channels (KTCs) are most likely to feature top Scotch Whisky mention accounts?

| Key Trade Channel | Share of Top Scotch Whisky Mention Accounts |
|------------------------------|---|
| CASUAL COCKTAIL BARS | 10% |
| COCKTAIL-FOCUSED FINE DINING | 9.1% |
| MODERN FINE DINING | 8.6% |
| PREMIUM COCKTAIL BARS | 8.2% |
| LUXURY HOTELS | 2.7% |
| PREMIUM HOTELS | 2.0% |



10% of top Scotch Whisky mention accounts are in the Casual Cocktail Bars KTC.



Which KTCs have driven Scotch Whisky depletions in top Scotch Whisky mention accounts nationally?

Top Opportunity Key Trade Channels for Scotch Whisky Depletions (9L/Yr)

POWERED BY [GROUND SIGNAL.AI](#)

- █ High↑
- █ Mid↓
- █ Mid↑
- █ High↓
- █ Neutral +/-

| KEY TRADE CHANNEL | AVERAGE ACCOUNT SCOTCH WHISKY DEPLETIONS (9L/YR) | AVERAGE ACCOUNT SCOTCH WHISKY DEPLETIONS VS. NATIONAL SCOTCH WHISKY BENCHMARK |
|--------------------------------------|--|---|
| LUXURY HOTELS | 10.9 | ↑373% |
| HIGH-ENERGY SPORTS BARS | 8.9 | ↑288% |
| BUSINESS HOTELS | 8.4 | ↑265% |
| WEDDING HOTELS | 7.9 | ↑245% |
| COCKTAIL-FOCUSED MEXICAN RESTAURANTS | 5.2 | ↑126% |
| COCKTAIL-FOCUSED HIGH-ENERGY DINING | 4.5 | ↑97% |
| NATIONAL SCOTCH WHISKY BENCHMARK | 2.3 | |





Which cocktails and cocktail flavors/ingredients appear most frequently on menus in top Scotch Whisky mention accounts?

Top Cocktails on Menu in Top Scotch Whisky Mention Accounts



POWERED BY [GROUND SIGNAL.AI](#)

| Cocktail | Cocktail Share* |
|-------------------------|-----------------|
| PENICILLIN | 8.1% |
| OLD FASHIONED | 5.8% |
| GODFATHER | 5.0% |
| ROB ROY | 2.6% |
| BLOOD & SAND | 2.5% |
| MARTINI | 2.0% |

*Cocktail Share as a percentage of total cocktails

Top Cocktail Flavors on Menu in Top Scotch Whisky Mention Accounts



POWERED BY [GROUND SIGNAL.AI](#)

| Flavor/Ingredient | Cocktail Share* |
|-------------------|-----------------|
| LEMON | 29% |
| GINGER | 18% |
| ORANGE | 17% |
| HONEY | 16% |
| LIME | 8.5% |
| CHERRY | 7.6% |

*Cocktail Share as a percentage of total cocktails

How are Scotch Whisky price tiers performing in terms of sales velocity in top Scotch Whisky mention accounts?

Scotch Whisky Price Tier Sales Performance (9L/Yr) in Top Scotch Whisky Mention Accounts

POWERED BY [GROUND SIGNAL.AI](#)

- High↑
- Mid↓
- Mid↑
- High↓
- Neutral +/-

- TOP SCOTCH WHISKY ACCOUNTS
- NATIONAL TIER BENCHMARK

| SCOTCH WHISKY PRICE TIER | SHARE OF TOTAL SCOTCH WHISKY VOLUME (%) | SALES VELOCITY (9L/YR) | SALES VELOCITY VS. NATIONAL TIER BENCHMARK |
|--------------------------|---|------------------------|--|
| LUXURY | 3.7% | 0.4 0.3 | +4% |
| PRESTIGE | 4.3% | 0.3 0.2 | ↗29% |
| ULTRA PREMIUM | 21% | 0.4 0.4 | -7% |
| SUPER PREMIUM | 49% | 2.8 1.5 | ↑81% |
| PREMIUM | 17% | 1.5 1.0 | ↑55% |
| STANDARD | 4.0% | 1.0 0.6 | ↑77% |
| VALUE | 0.0% | 0.0 0.0 | — |

