FORMULA 1 CONSUMER DEEP DIVE

On-Premise Activation Strategy
for Sponsorship Partners

GROUND SIGNAL

SPONSORSHIPS ARE SIGNED IN BOARDROOMS. THEY LIVE OR DIE IN THE ON-PREMISE.

Brands commit to high-profile partnerships and sponsorships every year — from Formula 1 to the Super Bowl to Coachella — with the expectation that cultural relevance drives consumer affinity and ultimately commercial performance. But the connection between sponsorship investment and on-premise revenue is rarely made explicit, and almost never made at the venue level.

The result is a familiar gap: a brand makes a significant investment in a partnership, builds awareness with a high-value consumer, and then loses that consumer at the last mile because the right venues don't have the right products on the menu.

Ground Signal closes that gap.

Consumer Audience & On-Premise Venues

By building a consumer audience from behavioral signal and identifying the on-premise venues where that audience is active, we give brands a complete picture of who this consumer is, where they drink, and what they want — across demographics, psychographics, occasions, environments, and beverage preferences.

Menu Analytics

Menu analytics then show how well the on-premise is currently serving that consumer.

Depletion Data

Depletion data validates the commercial opportunity.

Together, these three layers give brands everything they need to build a data-driven on-premise activation strategy that maximizes the ROI of existing sponsorship investments.

METHODOLOGY

How we built this dataset

To understand the F1 consumer and the on-premise venues where they are most active, we leveraged the power of Ground Signal's venue-level intelligence across four connected data layers.

Together, these analyses reveal the **consumer profile**, **behavioral patterns**, **menu** dynamics, and **commercial performance** across the venues where F1 fans drink – giving brands everything they need to build a data-driven activations strategy around their F1 partnership!

Here's how we approached it:

STEP 1

Identified consumers who post about Formula 1 on social media — including posts about races, drivers, and teams — to build a behaviorally defined audience of F1 fans.

STEP 2

Analyzed that audience's broader social activity to identify the on-premise venues they most frequently visit, building a universe of nearly 10,000 US accounts where F1 consumers are active.

STEP 3

Analyzed the demographic and psychographic profile of the F1 audience — including their interests, beverage alcohol affinities, cocktail preferences, and on-premise behaviors — to build a complete picture of who this consumer is and what they want.

STEP 4

Layered in venue-level intelligence across the ~10,000 account universe — including experience and occasion data, menu analytics, and depletion performance — to validate the commercial opportunity and identify where brands can build a data-driven go-to-market strategy.

For definitions of Ground Signal terminology used, please see pages 29-31

THE CONSUMER

CONSUMER DEMOGRAPHICS

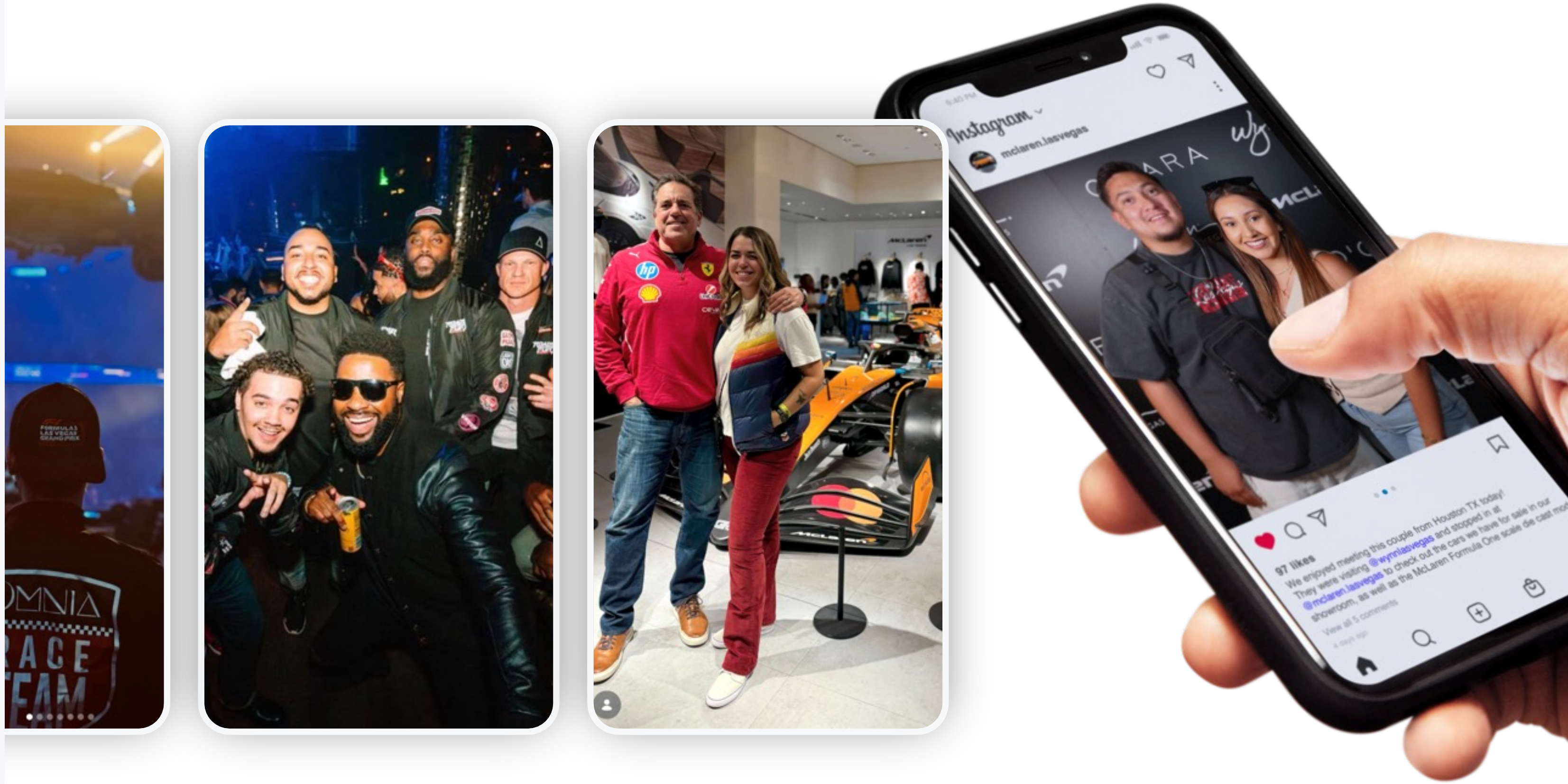
Who is the F1 consumer?

The F1 social audience skews strongly **male** and **younger** than the broader on-premise drinking population, with the 30-39 cohort showing the strongest over-index. For a younger-skewing audience, a **high income** over-index of +8% is a meaningful signal. On culture, the F1 audience is notably more **multicultural** than the on-premise benchmark, led by a Hispanic over-index of +171%.

F1 Consumers skew:

Compared to On-Premise consumers generally.

Male (70%)	Ages 30-39 (26%)	Hispanic (11%)	High Income (30%)
▲67%	▲21%	▲171%	▲8%



For definitions of Ground Signal terminology used, please see pages 29-31

CONSUMER PSYCHOGRAPHY AND INTERESTS

What does the F1 consumer care about?

Automotive obsession defines this audience — Auto Racing, Luxury Cars, Sports Cars, and Motorcycles are the four strongest over-indexing interests by a significant margin.

Beyond the track, a coherent **premium lifestyle** profile emerges: Luxury Fashion, Travel, Golf, Sailing, and Architecture all over-index, pointing to a consumer who lives aspirationally across multiple categories.

On beverage alcohol, **Craft Cocktails** leads as the highest-relevance BA interest, with Scotch and Cognac showing the strongest affinity factors — a **premium spirits** signal consistent with the broader lifestyle profile.

F1 consumers over-index for interests in:

Compared to All On-Premise Consumers (AOPC).

Automotive	AUTO RACING +813%	LUXURY CARS +373%	SPORTS CARS +362%	MOTORCYCLES +303%
Premium Lifestyle	SAILING +237%	GOLF +71%	TRAVEL +61%	LUXURY FASHION +44%
Beverage / Alcohol	 CRAFT COCKTAILS +10%	 SCOTCH +64%	 COGNAC +82%	

For definitions of Ground Signal terminology used, please see pages 29-31

SPIRIT BRAND AFFINITY

What does the F1 consumer drink?

The F1 audience shows strong affinity across **premium** and **ultra premium** spirits, with a clear tilt toward Scotch that stands out even in a premium-skewing dataset.

Multiple **Scotch** expressions over-index significantly, pointing to a consumer with genuine category depth rather than casual familiarity.

Cognac and premium Tequila round out a brand affinity profile that skews consistently toward the top end of the shelf.

Brand affinities cluster predominantly in the **super premium** tier and **above**, with notable interest extending into prestige and luxury expressions — consistent with a **younger**, **high-income** consumer who trades up.

Top Brand by Category

Whiskey	Johnnie Walker	+148%
Cognac	Rémy Martin Fine Champagne Cognac	+204%
Tequila	Don Julio	+91%
Vodka	Deep Eddy Vodka	+183%
Rum	Bacardí	+61%
Gin	Hendrick's Gin	+50%

Top Scotch Brands

The Macallan Highland Single Malt Scotch Whisky	+235%
Glenfiddich	+209%
The Glenlivet	+196%
Buchanan's Blended Scotch Whisky	+400%
Chivas Regal 12	+224%

For definitions of Ground Signal terminology used, please see pages 29-31

CONSUMER COCKTAIL PREFERENCES

What cocktails resonate with the F1 consumer?

The F1 audience's cocktail preferences skew toward **celebratory**, **social** serves — Mimosa, Espresso Martini, and Aperol Spritz all over-index significantly against the on-premise benchmark, pointing to a consumer who drinks for the occasion as much as the liquid.

Frozen Drinks and Tiki over-index as well, reinforcing a preference for fun, experience-led consumption.

The Margarita leads on absolute mention share at 17.9% but under-indexes vs. benchmark — suggesting it is broadly popular across on-premise consumers generally rather than a drink this audience gravitates toward specifically.

F1 Consumer cocktail preferences:
Compared to All On-Premise Consumers (AOPC).

MIMOSA

+366%

FROZEN DRINKS

+68%

TIKI

+289%

ESPRESSO MARTINI

+354%

APEROL SPRITZ

+1.2K%

For definitions of Ground Signal terminology used, please see pages 29-31

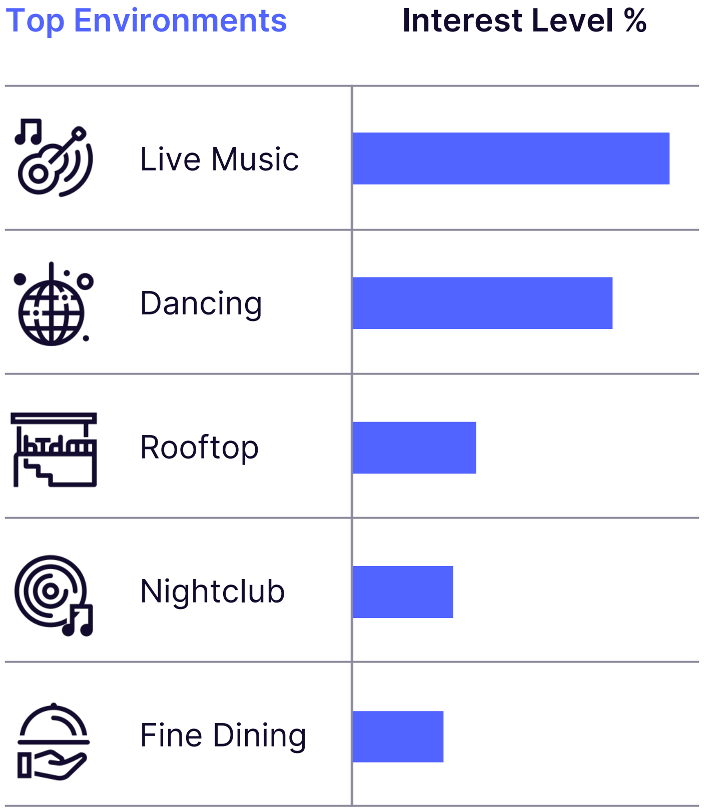
CONSUMER ENVIRONMENTS AND OCCASIONS

Where and when does the F1 consumer drink?

The F1 audience gravitates toward **high-energy**, **experience-led** environments — Live Music, Dancing, Rooftop, and Nightclub all over-index strongly, painting a picture of a consumer who drinks as part of a bigger night out rather than a casual visit.

On occasions, **Birthday** dominates at 43.8% mention share and the **sports occasion** cluster is exceptionally strong — Baseball, Basketball, Hockey, and Soccer all over-index significantly, consistent with an audience that organizes social drinking around live sports.

New Year's, Halloween, and Valentine's Day round out a consumer who **shows up** for the **big moments**.



F1 VENUE UNIVERSE

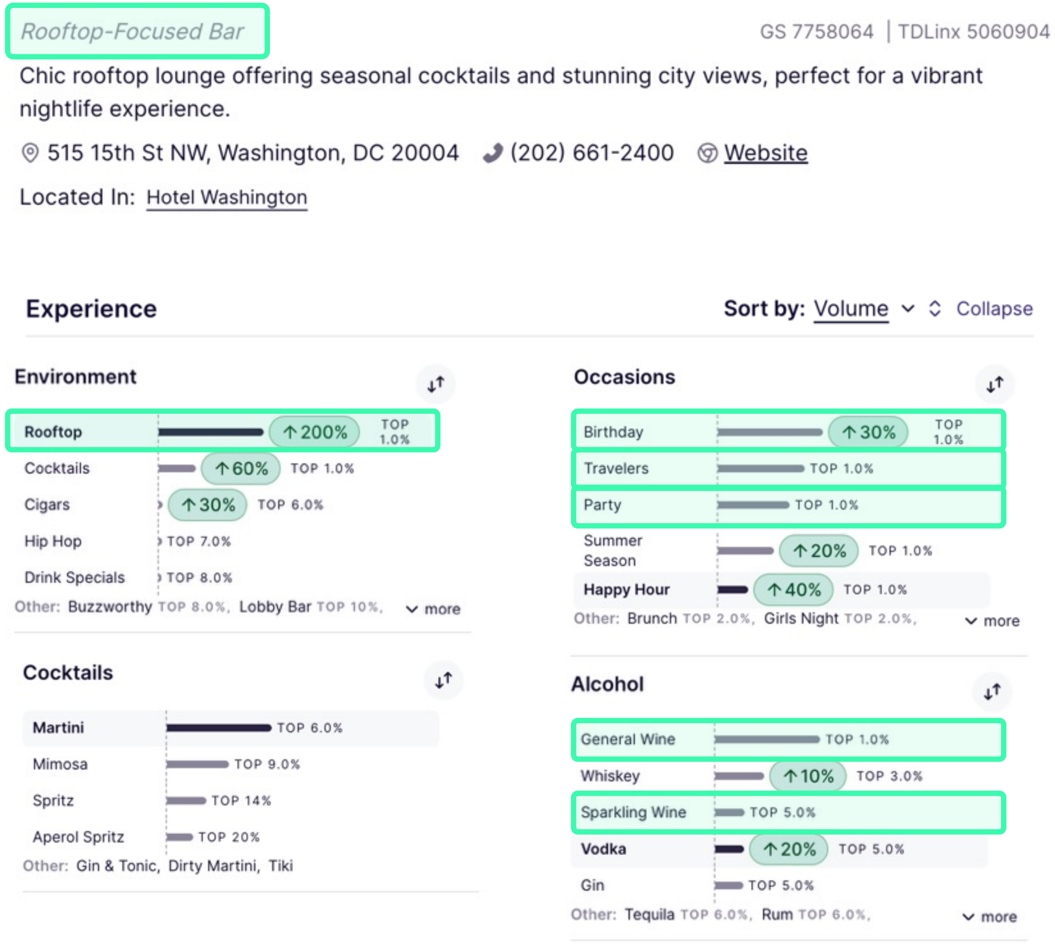
VENUE EXAMPLE

What does an F1 consumer venue look like?

Vue Rooftop at the W Hotel in Washington DC is a **chic** rooftop bar with city views, **late-night energy**, and a cocktail-forward experience — exactly the kind of premium, experience-led venue that shows up consistently across the F1 venue universe.

Rooftop over-indexes at +200% above benchmark, Birthday and Travelers are the top occasions, and Sparkling Wine and **Craft Cocktails** lead on consumer alcohol affinity.

VUE ROOFTOP



Rooftop-Focused Bar

GS 7758064 | TDLinx 5060904

Chic rooftop lounge offering seasonal cocktails and stunning city views, perfect for a vibrant nightlife experience.

515 15th St NW, Washington, DC 20004 ☎ (202) 661-2400 Website

Located In: Hotel Washington

Experience

Sort by: Volume Collapse

Environment

Rooftop	↑200%	TOP 1.0%
Cocktails	↑60%	TOP 1.0%
Cigars	↑30%	TOP 6.0%
Hip Hop		TOP 7.0%
Drink Specials		TOP 8.0%

Other: Buzzworthy TOP 8.0%, Lobby Bar TOP 10%, more

Cocktails

Martini	TOP 6.0%
Mimosa	TOP 9.0%
Spritz	TOP 14%
Aperol Spritz	TOP 20%

Other: Gin & Tonic, Dirty Martini, Tiki

Occasions

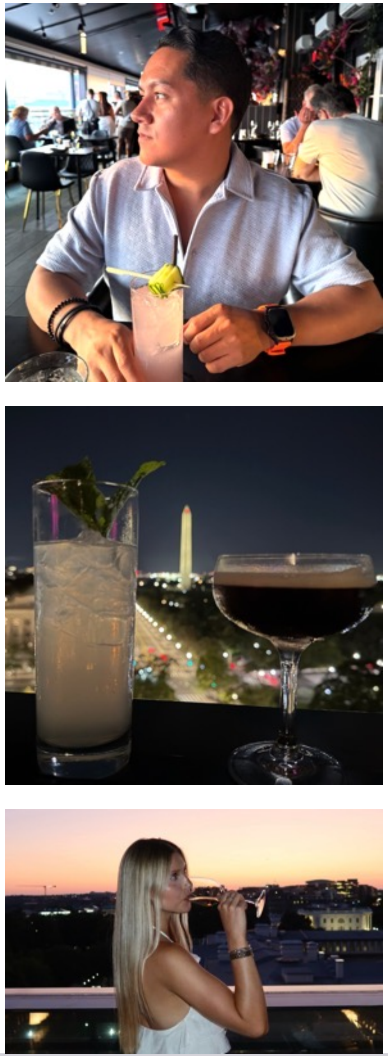
Birthday	↑30%	TOP 1.0%
Travelers		TOP 1.0%
Party		TOP 1.0%
Summer Season	↑20%	TOP 1.0%
Happy Hour	↑40%	TOP 1.0%

Other: Brunch TOP 2.0%, Girls Night TOP 2.0%, more

Alcohol

General Wine		TOP 1.0%
Whiskey	↑10%	TOP 3.0%
Sparkling Wine		TOP 5.0%
Vodka	↑20%	TOP 5.0%
Gin		TOP 5.0%

Other: Tequila TOP 6.0%, Rum TOP 6.0%, more



For definitions of Ground Signal terminology used, please see pages 29-31

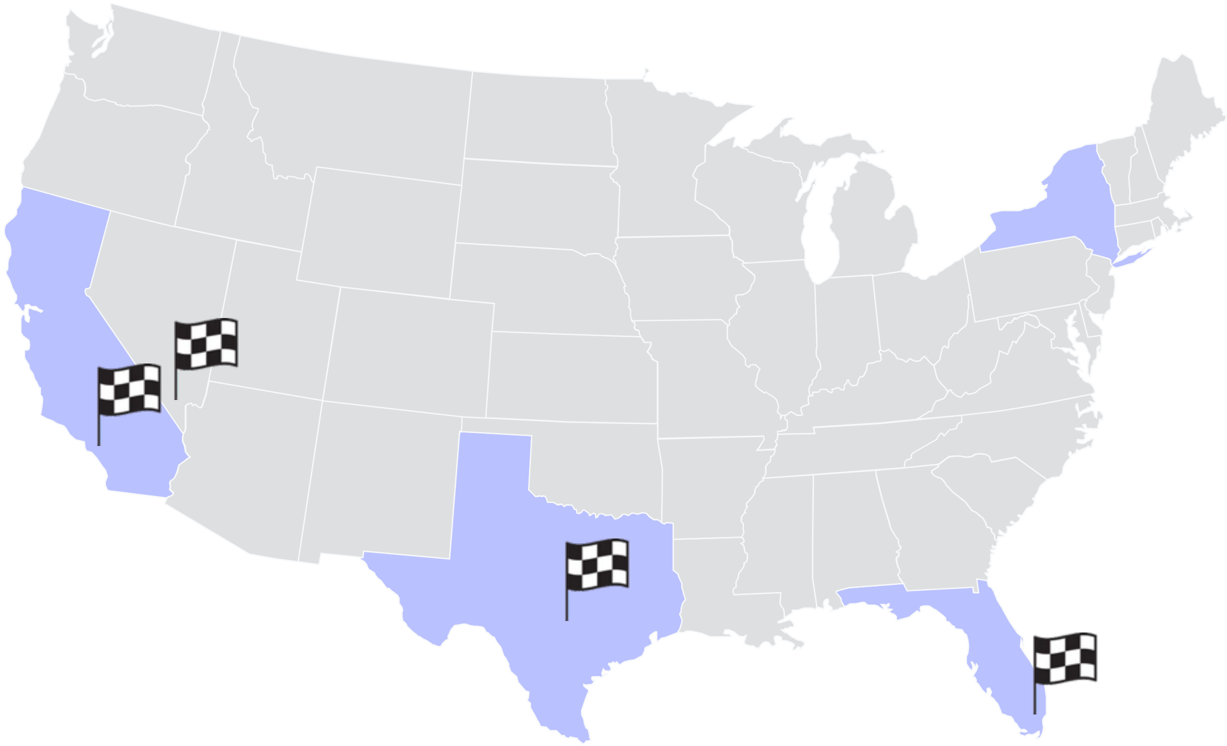
ACCOUNT GEOGRAPHY

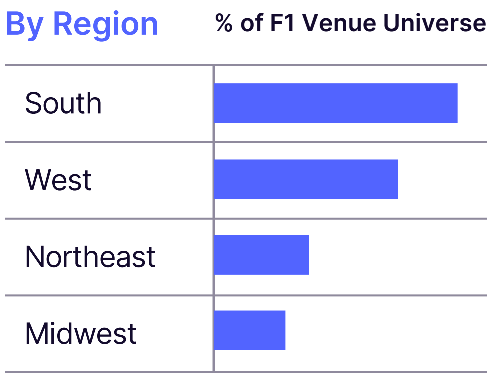
Where are F1 consumers drinking?

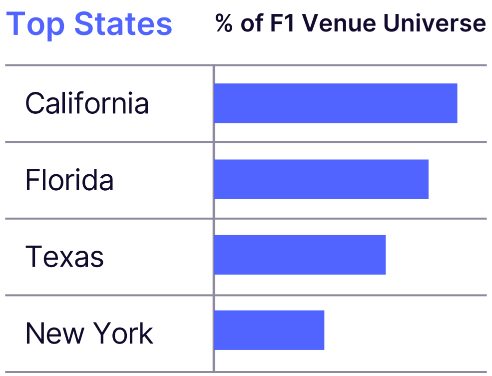
The F1 venue universe skews heavily toward the South and West, with California, Florida, and Texas accounting for 44% of all accounts.

The market-level picture tells the more interesting story — Austin, Miami, and Las Vegas over-index significantly above their national benchmark, and it's no coincidence that all three are **US Grand Prix** markets.

The concentration of F1 consumer activity in race host cities points to a fan base that is geographically engaged with the sport beyond the television screen.







Top DMAs	% Above Benchmark
Austin, TX	▲ 450%
Las Vegas, NV	▲ 320%
Miami, FL	▲ 275%
Los Angeles, CA	▲ 158%

For definitions of Ground Signal terminology used, please see pages 29-31

ACCOUNT CHANNEL ANALYSIS

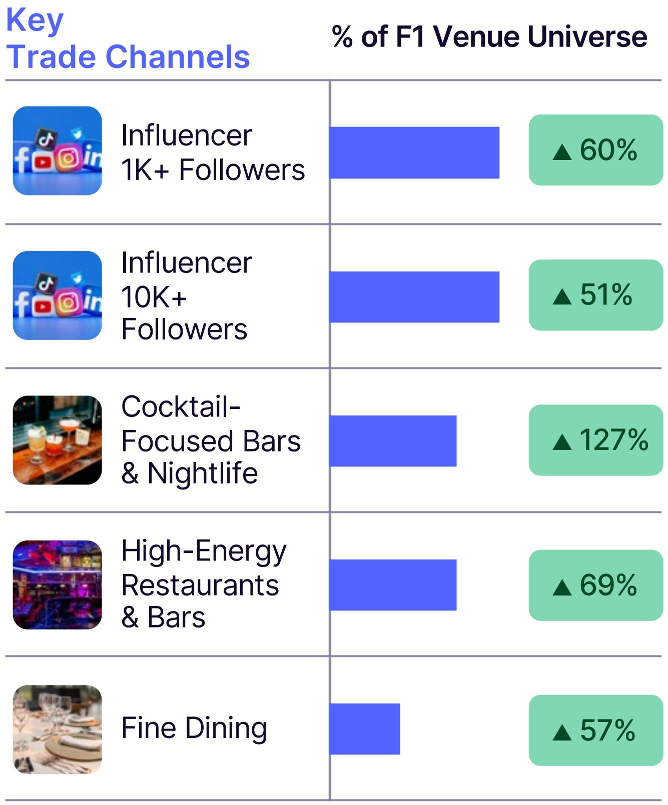
What kind of venues make up the F1 universe?

The F1 venue universe skews heavily toward **premium hospitality** and **experience-led** accounts.

Hotels over-index significantly, led by Leisure and Premium properties, and Arts & Culture venues — driven by stadiums, arenas, and performance spaces — over-index at more than four times the national benchmark.

Notably, F1 consumer venues over-index for **high social influence** accounts — consistent with a consumer who drinks in venues worth showing up for and sharing.

Trade Channels	% of F1 Venue Universe	
Restaurants		
Bars		
Hotels, Casinos, & Resorts		▲ 127%
Arts & Culture		▲ 363%
Recreation & Entertainment		▲ 79%
Nightlife		▲ 49%



Key Trade Channels	% of F1 Venue Universe	
Influencer 1K+ Followers		▲ 60%
Influencer 10K+ Followers		▲ 51%
Cocktail-Focused Bars & Nightlife		▲ 127%
High-Energy Restaurants & Bars		▲ 69%
Fine Dining		▲ 57%

For definitions of Ground Signal terminology used, please see pages 29-31

What are the key drivers in venues F1 fans frequent?

F1 fans gravitate toward **destination-style**, experience-led venues — Beach, Live Music, and Bottle Service are the environments that over-index most strongly against the on-premise benchmark.

The occasions that bring them out reflect the same profile: **General Sports** and **Travelers** dominate while the summer season is growing. Personal milestone occasions under-index.

This is a consumer who drinks as **part of a bigger experience** — a trip, a sporting event, a seasonal moment — rather than a casual or celebratory night out.

Top F1 Environments & Occasions:

Compared to All On-Premise Consumers (AOPC).

General Sports	▲ 123%
Bottle Service	▲ 75%
Travelers	▲ 58%
Beach	▲ 38%
Live Music	▲ 35%

Trending F1 Environments & Occasions:

Compared to All On-Premise Consumers (AOPC).

Golf	▲ 52%
Drink Specials	▲ 19%
Beach	▲ 19%
Summer	▲ 8%

For definitions of Ground Signal terminology used, please see pages 29-31

What cocktails are popular in F1 consumer venues?

Tiki and **Espresso Martini** are the standout over-indexing serves in F1 consumer venues — and notably, Tiki and Frozen Drinks both correlate with the beach, pool, and resort environments that define this venue universe, reinforcing a consistent picture of destination-style, outdoor consumption.

The Martini leads on absolute mention share among over-indexing cocktails at 15.4% and is growing, reinforcing a consumer who also gravitates toward classic, spirit-forward serves.

The trending data points to further premiumization — **Spritz** is the **fastest growing** cocktail at +43% over three years, and **Mocktails** are **growing strongly** at +39%.

Top F1 Cocktails:
Compared to All On-Premise Consumers (AOPC).

	Tiki	▲ 35%
	Espresso Martini	▲ 17%
	Frozen Drinks	▲ 10%
	Martini	▲ 4%
	Mocktails	▲ 3%

Trending F1 Cocktails:
Compared to All On-Premise Consumers (AOPC).

	Spritz	▲ 43%
	Mocktails	▲ 39%
	Martini	▲ 17%
	Espresso Martini	▲ 9%
	Flavored Margarita	▲ 5%

For definitions of Ground Signal terminology used, please see pages 29-31

FLAVORS

What flavors are showing up in F1 consumer venues?

Espresso dominates the flavor profile of F1 consumer venues at 24% mention share and over-indexes at +25% above benchmark — the single strongest flavor signal in the dataset and consistent with the Espresso Martini's prominence in the cocktail data.

Lemonade is the second most mentioned flavor at nearly 20% and over-indexes strongly at +54%, pointing to a preference for bright, citrus-forward serves.

Lychee is the standout **emerging** flavor — growing at +8% over three years with a +20% over-index, consistent with the broader premiumization trend visible across the cocktail data.

Top F1 Cocktail Flavors/Ingredients:
Compared to All On-Premise Consumers (AOPC).

Lemonade	▲ 54%
Espresso	▲ 25%
Lychee	▲ 20%
Spicy	▲ 18%
Orange	▲ 12%

Top F1 Cocktail Flavors/Ingredients:
Compared to All On-Premise Consumers (AOPC).

Espresso	▲ 16%
Strawberry	▲ 13%
Mango	▲ 13%
Lychee	▲ 8%

For definitions of Ground Signal terminology used, please see pages 29-31

MENU ANALYTICS

MENU ANALYSIS: CATEGORY

What spirit categories are winning on F1 venue menus?

F1 consumer venue menus skew toward **premium**, **craft-forward** categories — Gin, Amaro / Aperitif / Vermouth, and Mezcal are the standout over-indexing categories, reflecting a menu culture built around **sophisticated**, occasion-led drinking.

Whiskey over-indexes at +15% with strong and growing presence, **consistent** with the F1 consumer's deep affinity for premium whiskey expressions.

Tequila leads on raw menu share at 80% but is closer to benchmark — suggesting the category is broadly represented across all on-premise accounts rather than being a distinctive F1 venue signal.

CATEGORY	MENU SHARE	VS. BENCHMARK	TREND
 **TEQUILA / AGAVE**	80%	+7%	+3%
 **WHISKEY**	71%	↗15%	+2%
 **GIN / GENEVER**	59%	↗21%	+1%
 **AMARO / APERITIF / VERMOUTH**	49%	↗32%	+3%
 **BRANDY / COGNAC**	21%	↗15%	-7%

For definitions of Ground Signal terminology used, please see pages 29-31

What cocktails are on the menu at F1 consumer venues?

F1 venue menus **reflect** the same premium, experience-led drinking culture **visible throughout this report** — the Espresso Martini, Spritz, and Mezcal Cocktail are among the strongest over-indexing serves, pointing to menus built around craft, occasion, and global influence.

The **Lychee Martini** and **Carajillo** are the standout **emerging serves**, both growing strongly and both consistent with the Cosmopolitan, culturally aware consumer profile.

Mocktails are the **fastest growing** item on F1 venue menus at +177% year over year — a signal that these venues are increasingly building menus for consumers who want to participate in the occasion on their own terms.

Top F1 Cocktails on Menu

COCKTAIL	MENU SHARE	VS. BENCHMARK
 **ESPRESSO MARTINI**	33%	↗ 34%
 **SPRITZ**	18%	↗ 48%
 **MEZCAL COCKTAIL**	16%	↑ 59%
 **TIKI**	4%	↑ 63%
 **LYCHEE MARTINI**	4%	↑ 68%

Trending F1 Cocktails on Menu

COCKTAIL	MENU SHARE	YoY TREND
 **FROZEN DRINKS**	11%	↑ 286%
 **MOCKTAILS**	3%	↑ 177%
 **CARAJILLO**	6%	↑ 73%
 **LYCHEE MARTINI**	4%	↑ 54%
 **SPICY MARGARITA**	10%	↗ 28%

MENU ANALYSIS: FLAVORS

What flavors are showing up on F1 venue menus?

F1 venue menus skew toward **bold, globally-influenced** flavor profiles — Lychee, Hibiscus, Passionfruit, and Elderflower all over-index significantly, pointing to menus that reach beyond the standard citrus and fruit playbook.

Coffee is the dominant flavor by menu share at 53% and is growing at +15% year over year, consistent with the **Espresso Martini's** prominence in the cocktail data.

Spicy is the most broadly present over-indexing flavor at 43% menu share and continues to grow — reinforcing a consumer and venue culture that gravitates toward **complexity** and **bold** expression.

Top F1 Cocktail Flavors on Menu

FLAVOR/INGREDIENT	MENU SHARE	VS. BENCHMARK
ELDERFLOWER	30%	+4%
PASSIONFRUIT	26%	+4%
WATERMELON	21%	+6%
HIBISCUS	14%	+10%
LYCHEE	11%	↗26%

Trending F1 Cocktail Flavors on Menu

FLAVOR/INGREDIENT	MENU SHARE	YoY TREND
LYCHEE	11%	↗26%
COFFEE	53%	↗15%
SPICY	43%	+12%
HIBISCUS	14%	+10%
WATERMELON	21%	+6%

For definitions of Ground Signal terminology used, please see pages 29-31

MENU ANALYSIS: BRANDS

What brands are winning on F1 venue menus?

The **brand** landscape on F1 venue menus skews consistently toward **premium** and **super-premium** expressions — Grey Goose, Ketel One, Hendrick's, Don Julio, and Casamigos are among the strongest over-indexing brands with meaningful menu presence, reflecting a venue culture that has largely self-selected toward the top end of the shelf.

Aperol is the volume leader among over-indexing brands at 31% menu share, **consistent** with the **Spritz's** prominence in the cocktail data.

The fastest **growing brands** tell a story of **premiumization** continuing at pace — Patron growing at +57%, Casamigos at +42%, and Don Julio at +23% — pointing to a menu universe that is actively trading up.

Top Premium+ Brands on F1 Venue Menus

TOP BRAND	CATEGORY	MENU SHARE	VS. BENCHMARK
APEROL 1919	Aperitif	31%	↑50%
Ketel One VODKA	Vodka	17%	↑81%
GREY GOOSE VODKA	Vodka	17%	↑78%
HENDRICK'S GIN	Gin	12%	↑73%
Don Julio	Tequila	11%	↑74%
CASAMIGOS	Tequila	11%	↑64%

Trending Premium+ Brands on F1 Venue Menus

TOP BRAND	CATEGORY	MENU SHARE	TREND
PATRÓN TEQUILA	Tequila	18%	↑57%
CASAMIGOS	Tequila	11%	↗42%
GREY GOOSE VODKA	Vodka	17%	↗24%
Don Julio	Tequila	11%	↗23%
Ketel One VODKA	Vodka	17%	+12%

For definitions of Ground Signal terminology used, please see pages 29-31

MENU ANALYSIS: PRICING

What are consumers paying for cocktails in F1 consumer venues?

The mean cocktail price across F1 venue menus is **$14.26** — but that average masks significant variation by category and channel.

Cognac commands the **highest** average price at $18.45, consistent with the ultra-premium brand affinities visible in the consumer data, and **Scotch cocktails** average **$21.28** — the highest priced serve category and still growing.

Hotel and Fine Dining channels drive the pricing premium, with Luxury Hotels averaging $20.76 per cocktail — nearly 50% above the overall mean.

Across every channel, **prices are trending upward**, pointing to a venue universe where consumers are consistently willing to pay more.

Avg Cocktail Price by Category

CATEGORY	AVG COCKTAIL PRICE
 **COGNAC**	$18.45
 **AMARO / APERITIF / VERMOUTH**	$16.33
 **GIN / GENEVER**	$15.61
 **WHISKEY**	$15.00
 **TEQUILA / AGAVE**	$14.68
 **VODKA**	$14.01

Avg Cocktail Price by Channel

KEY TRADE CHANNEL	AVG COCKTAIL PRICE
 **LUXURY HOTELS**	$20.76
 **FINE DINING**	$17.47
 **NIGHTLIFE HOTELS**	$17.03
 **PREMIUM HOTELS**	$15.90
 **RESORTS**	$15.90

DEPLETION ANALYSIS

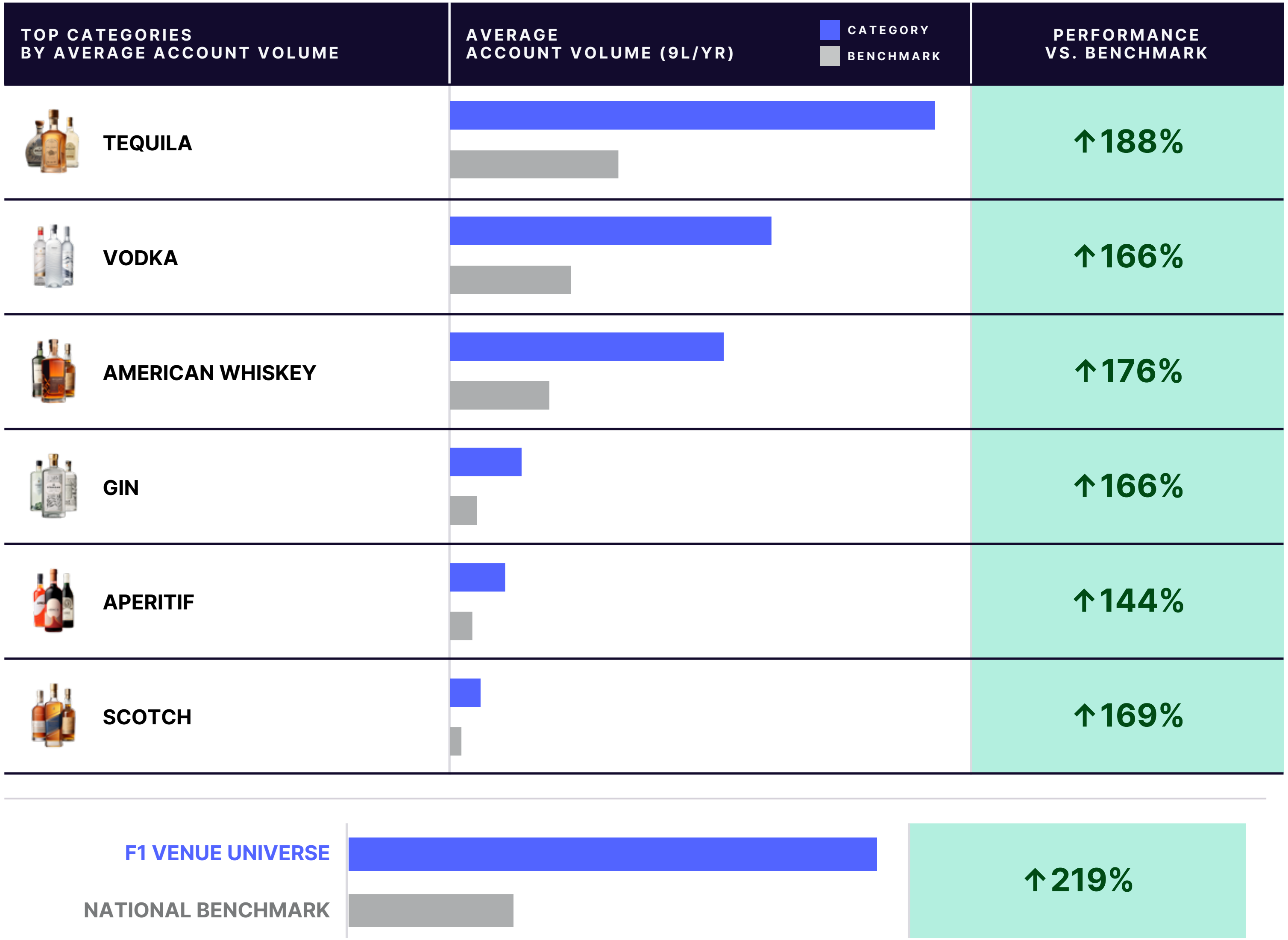
AVERAGE ACCOUNT VOLUME

How do F1 consumer venues perform commercially?

F1 consumer venues dramatically outperform the national on-premise benchmark on total spirits volume — average account volume runs at 237 9L cases versus a national average of 74, more than **three times** the benchmark.

Some of that outperformance reflects the channel composition of the F1 venue universe, which skews toward hotels and high-volume hospitality accounts.

But even when controlling for channel, F1 consumer accounts outperform comparable venues **by at least** a factor of **two** — pointing to a genuinely high-value account universe independent of venue type.



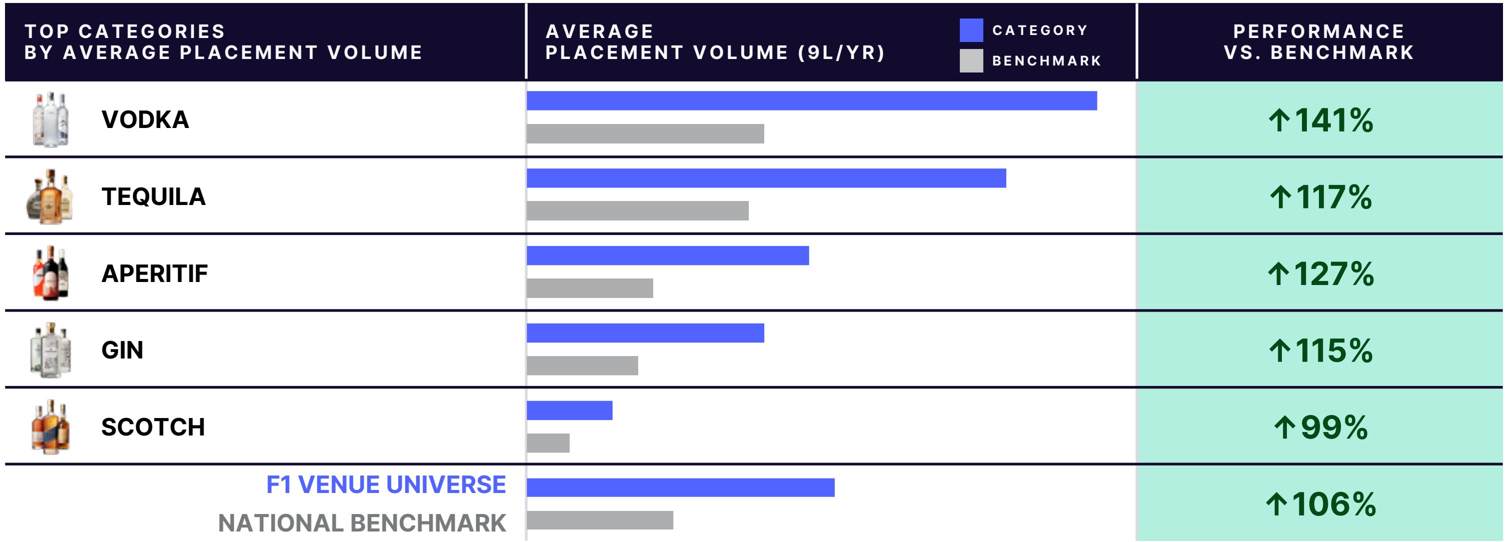
AVERAGE VOLUME PER PLACEMENT ANALYSIS

How much does a placement deliver in F1 consumer venues?

The per placement story is equally compelling — F1 venue accounts deliver an average approximately 6 9L cases per placement versus, more than **double** the national benchmark.

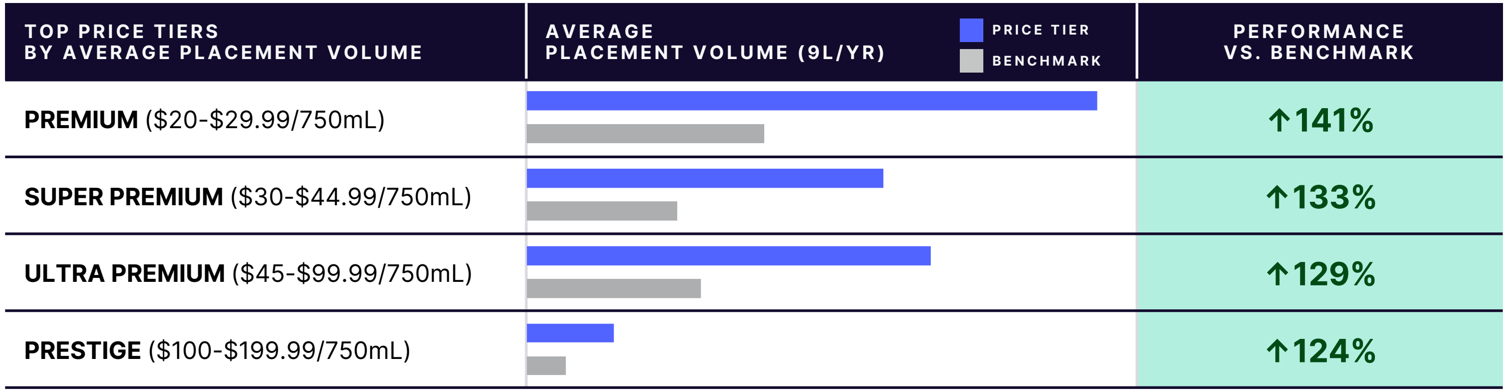
Vodka and **Tequila** lead on absolute placement velocity, but the most striking finding is in the premium tiers — Super Premium and Ultra Premium placements both deliver more than twice the national placement average, meaning a brand that wins a premium menu placement in the F1 venue universe can expect **significantly higher returns** per feature than in the broader on-premise market.

Top Categories by Placement Volume



TOP CATEGORIES BY AVERAGE PLACEMENT VOLUME	AVERAGE PLACEMENT VOLUME (9L/YR) 🟦 CATEGORY ⬜ BENCHMARK	PERFORMANCE VS. BENCHMARK
VODKA		↑141%
TEQUILA		↑117%
APERITIF		↑127%
GIN		↑115%
SCOTCH		↑99%
F1 VENUE UNIVERSE NATIONAL BENCHMARK		↑106%

Top Price Tiers by Placement Volume



TOP PRICE TIERS BY AVERAGE PLACEMENT VOLUME	AVERAGE PLACEMENT VOLUME (9L/YR) 🟦 PRICE TIER ⬜ BENCHMARK	PERFORMANCE VS. BENCHMARK
PREMIUM ($20-$29.99/750mL)		↑141%
SUPER PREMIUM ($30-$44.99/750mL)		↑133%
ULTRA PREMIUM ($45-$99.99/750mL)		↑129%
PRESTIGE ($100-$199.99/750mL)		↑124%

CATEGORY AND TIER SHARE ANALYSIS

How does category and tier mix differ in F1 consumer venues?

The tier mix in F1 consumer venues diverges meaningfully from the national on-premise benchmark — **Standard** tier **under-indexes** at 31% versus 38.5% nationally, while **Super Premium**, **Ultra Premium**, and **Prestige** all **over-index significantly**, confirming a venue universe where consumers consistently trade up.

At the category level the standout signals are **Aperitif** at +69% above benchmark category share and **Scotch** at +19% — both consistent with the premium, experience-led drinking culture visible throughout this report.

Flavored Whiskey under-indexes at less than half its national category share, reinforcing the picture of an audience that gravitates toward premium, unflavored expressions.

Top Categories by Category Share

TOP CATEGORIES	CATEGORY SHARE (🟦 CATEGORY ⬜ BENCHMARK)	PERFORMANCE VS. BENCHMARK
APERITIF	2.0% 1.2%	↑69%
TRADITIONAL RUM	7.0% 5.8%	↗20%
SCOTCH WHISKY	1.5% 1.2%	↗19%
AMERICAN WHISKEY	16.7% 16.1%	+4%
FLAVORED WHISKEY	2.2% 4.9%	↓55%

Top Price Tiers by Category Share

TOP PRICE TIERS	CATEGORY SHARE (🟦 PRICE TIER ⬜ BENCHMARK)	PERFORMANCE VS. BENCHMARK
VALUE (>$10/750mL)	6.0% 9.0%	↘33%
STANDARD ($10-$19.99/750mL)	31.0% 38.5%	↘20%
SUPER PREMIUM ($30-$44.99/750mL)	16.1% 11.6%	↗38%
ULTRA PREMIUM ($45-$99.99/750mL)	14.6% 10.8%	↗36%
PRESTIGE ($100-$199.99/750mL)	0.6% 0.3%	↑82%

For definitions of Ground Signal terminology used, please see pages 29-31

THE F1 OPPORTUNITY

The F1 consumer is a **younger**, more **multicultural**, and **higher-income** audience than the typical on-premise drinker — one who gravitates toward **premium**, experience-led venues and consistently **trades up** on spirits.

The commercial opportunity in the F1 venue universe is real and concentrated: account volumes and placement velocity **dramatically outperform** the national benchmark, and the categories where **consumer affinity** is strongest are the same ones **gaining ground** on menus.

For brands with F1 partnerships, the on-premise activation path is clear: the right venues, the right tier, and programming built around the occasions this consumer actually shows up for.

Key Insights

- F1 venue accounts average 237 9L cases vs 74 nationally — more than 3x the benchmark, and at least 2x within comparable channel types.
- Ultra Premium and Super Premium placements deliver +129% and +133% above national placement velocity respectively.
- Scotch over-indexes at +111% on menus — the strongest liquor type over-index in the dataset — yet Cognac menu presence remains relatively low despite strong consumer affinity.
- Aperitif is the fastest growing category on F1 venue menus and over-indexes on depletion at +69% category share above benchmark.
- Ultra Premium Tequila account volume runs at 45 cases vs 13 nationally — +247% above benchmark.
- The F1 venue universe skews toward Luxury Hotels (+650% vs benchmark), Resorts (+415%), and Fine Dining (+107%) — the highest value channels in the on-premise.

THE GROUND SIGNAL ADVANTAGE

Formula 1 is one of the most visible sponsorship properties in the world — but the analytical approach that powers this report is not specific to F1.

Any cultural moment, sporting event, or brand partnership can be turned into a **data-driven** on-premise **activation strategy** using the same methodology. Ground Signal **connects the dots** between consumer behavior, venue intelligence, menu analytics, and depletion data — giving suppliers and distributors an entirely **new way to build** and activate their **go-to-market** strategy around major partnership investments.

The F1 consumer report is one example of what becomes possible when all of Ground Signal's proprietary sources of data work together. The opportunity to apply this thinking is limited only by the partnerships and cultural moments a brand chooses to activate around.

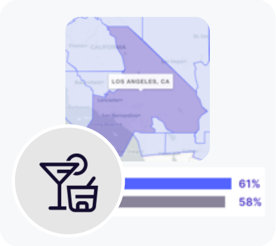
GROUND SIGNAL SOCIAL TERMINOLOGY

ACCOUNT SHARE

The percentage of on-premise accounts where consumers reference a specific experience.

This metric shows how widely an experience appears across venues in a market, independent of how frequently consumers discuss it within any single account.

Example: Consumers mention Cocktails at 61% of independent accounts in the Los Angeles DMA - or Cocktails account share is 61%.

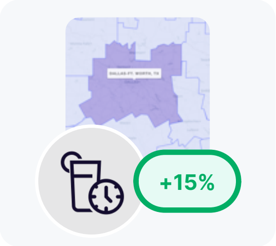


INDEX

A relative measure that compares the level of a given metric within a selected set of accounts to the same metric calculated across a benchmark set of accounts.

An Index highlights where experiences, occasions, or attributes are over- or under-represented versus expectation, making it easier to identify what disproportionately resonates with consumers in the selected accounts.

Example: Consumers are +15% more likely to mention Happy Hour at independent accounts in Dallas, TX than in all accounts nationally - or Happy Hour over-indexes by +15% in the Dallas market.

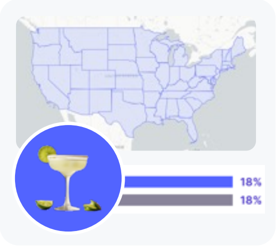


MENTION SHARE

The percentage of on-premise consumers who reference a specific venue experience within a broader experience category of conversation.

This metric highlights which experiences are most strongly associated with target venues.

Example: 18% of consumers nationally who mention cocktails, mention Margaritas - or Margarita mention share nationally is 18%.

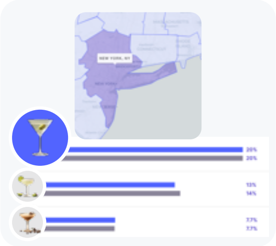


TOP [EXPERIENCE CATEGORY NAME]
(e.g. Top Cocktails)

A ranked view of venue experiences or attributes that stand out based on one or more performance signals *(such as highest Mention Share, Venue Share, Index versus a benchmark set, or strongest rate of change over time*).

This view is used to quickly identify the experiences that matter most in a given set of venues —whether because they are most common, most distinctive relative to the broader market, or emerging most rapidly.

Example: The Martini is the top cocktail in independent NYC accounts - with the largest mention share at 20%.

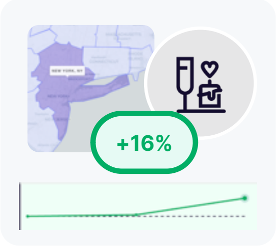


TREND

A measure of how a given metric has evolved over time by comparing its current value to the same metric in a prior period, typically two or three years earlier.

Trend analysis helps distinguish between experiences that are consistently important versus those that are gaining or losing relevance over time within a selected set of venues.

Example: Consumers at independent accounts in NYC were +16% more likely to mention Date Night in 2025 than they were in 2023 - or Date Night's mention share trend is +16%.



GROUND SIGNAL DEPLETION TERMINOLOGY

AVERAGE ACCOUNT VOLUME

The average total sales volume per on-premise account for a given spirit category, sub-category, or price tier across a selected set of accounts.

This metric represents the overall size of the opportunity within the selected universe and is commonly used as a baseline to understand total category potential before considering brand-level performance or distribution.

Example: The average independent account in the Miami-FTL DMA sells 63.6 9L cases annually - or the Vodka Average Account Volume in independent Miami-FTL DMA is 63.6 9L.

AVERAGE PLACEMENT VOLUME

The average sales volume a brand can *expect* to generate per account once it has secured a point of distribution (POD), calculated by dividing average category volume by the average number of brands with sales in the selected account universe.

This metric provides a practical expectation for brand performance upon securing distribution and is used to estimate the sales impact of winning incremental placements within similar accounts.

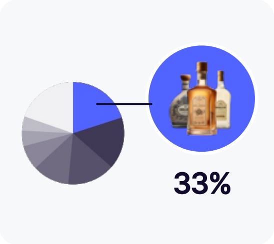
Example: In independent restaurants in Houston TX, we would expect that each new Liqueur POD would yield 2.8 9L cases per year - or the Average Placement Volume of Liqueurs in Independent Restaurants in Houston is 2.8 9L cases.

CATEGORY SHARE

The proportion of total average placement volume per account that is attributable to a specific category, sub-category, or price tier within a selected set of accounts.

This metric helps indicate which types of products or price tiers are most relevant in the selected accounts and provides directional guidance on where brands are more likely to perform well based on the underlying sales mix.

Example: In National accounts - roughly one out of every three bottles sold is Tequila - or Tequila's category share in national accounts is 33%



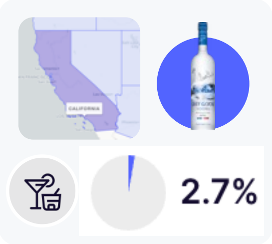
GROUND SIGNAL MENU & CONSUMER TERMINOLOGY

COCKTAIL SHARE

The proportion of total menu items (e.g., cocktails or drink listings) that feature a given brand, spirit category, flavor, or attribute within a selected set of menus.

This metric reflects how prominent an item or attribute is within menus themselves, not just whether it appears at least once.

Example: Grey Goose is used in 2.7% of all cocktails in independent California accounts - or its cocktail share is 2.7%.

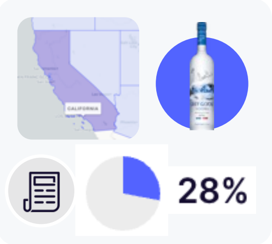


MENU SHARE

The percentage of on-premise menus that feature a given brand, cocktail, spirit category, or flavor at least once.

This metric indicates how widely an item appears across menus, regardless of how many times it is listed within any single menu.

Example: Grey Goose is featured on 28% of independent account menus in the state of California - or Grey Goose's menu share is 28%.

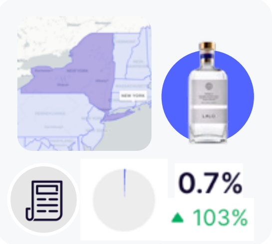


MENU / COCKTAIL SHARE CHANGE

The change in Menu Share or Cocktail Share over time, comparing the current period to a prior period *(e.g., year-over-year, half-over-half, quarter-over-quarter, or month-over-month).*

This metric is used to assess whether visibility on menus or within cocktail listings is increasing or declining over time, independent of absolute share levels.

Example: In Q4 of 2025, LALO Tequila was featured on 0.7% of independent accounts in New York state - which was +108% higher than the same period in 2024.

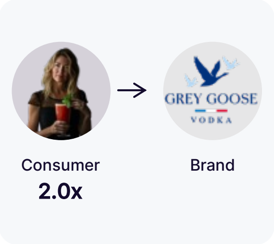


BRAND AFFINITY

The percentage of a defined audience that demonstrates affinity toward a particular spirit brand, based on observed behaviors such as mentions, follows, or other forms of engagement.

This metric is used to identify which brands an audience is most inclined toward, helping surface brand preferences that may influence menu strategy, placements, and activation decisions.

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.

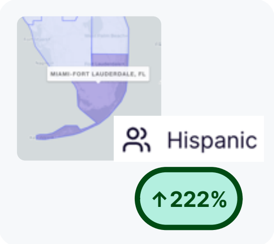


DEMOGRAPHIC SKEW

A relative measure that indicates how much more or less likely members of a defined audience are to belong to a specific demographic group compared to on-premise consumers overall.

This metric is used to identify which demographic segments are over- or under-represented within a selected audience versus the broader on-premise baseline.

Example: 46% of consumers in the Miami - FTL DMA self identify as Hispanic which is +222% higher than the national average. Consumers in Miami-FTL skew +222% Hispanic.



AI Solutions for the Beverage Alcohol Industry

Ground Signal is leading a revolution in the beverage alcohol industry. Our mission is to empower businesses 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 empower the industry to better align its offerings, delight consumers, and increase sales.

Ground Signal Data Used In This Analysis

CONSUMER	VENUE	DEPLETIONS	MENU
1B+ Monthly Social Posts & Engagements	**270K+** On-Premise Venues	**4+** Years Depletion History	**125K+** On-Premise Accounts w/Monthly Menu Collection
150M+ Consumer Profiles Analyzed	**600+** Unique Venue Attributes	**2.8K+** SKUs at Account Level	**8.0K+** Spirits, Cocktails, Wine, Beer, and Flavor Profiles

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