

#SUMMERDRINKSZN



Seasonal Trends in On-Premise Consumption



GROUND SIGNAL





OVERVIEW

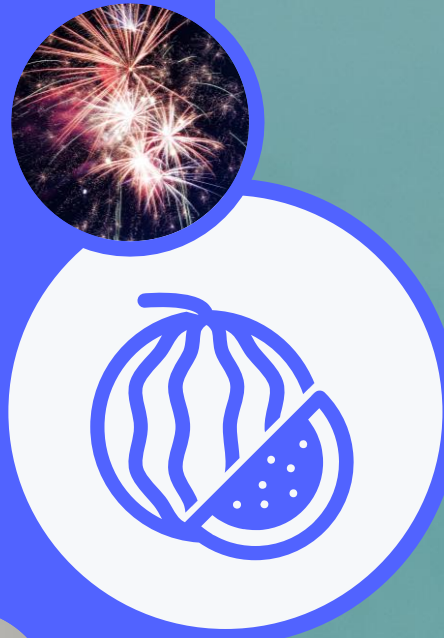


During the summer months, we see significant shifts in consumption patterns across occasions, venues, cocktails, and flavors. For brands looking to cash in on these opportunities - understanding these behavioral shifts is critical to aligning offerings with consumer preferences.

This report analyzes the summer drinking season using Ground Signal's proprietary data, but the same approach — social insights, account segmentation, menu analytics, and depletion validation — can enhance any go-to-market strategy.

KEY FOCUS AREAS:

-  Consumer social conversation with the frequency to identify seasonal trends and align brand positioning with consumer preferences.
-  Account-level segmentation linking social posts to on-premise venues and proprietary trade channel classifications
-  Menu analytics providing competitive context across categories, brands, cocktails, and flavors
-  Depletion data validating the scope of the commercial opportunity and prioritizing brand placement



Read on for data-driven insights that power your winning strategy. For definitions of Ground Signal terminology used, please see page 26.

How we were able to deliver these insights

To understand what truly drives On-Premise consumption during the summer drinking season, we analyzed consumer social mentions across hundreds of thousands of venues and beverage occasions.

Together, these analyses reveal the core drivers of seasonal consumption — the **cocktails, flavors, categories, occasions** and **environments** most associated with summer consumption

Here's how we approached it:

STEP 1

Using the past 5 years of social history, we calculated seasonal factors by calculating the ratio **of consumer mentions for each cocktail, flavor, occasion, and environment** during the summer months (June–August) to that same factor's share during the entire year to identify how consumer behavior shifts during the summer months.

STEP 2

Next, we looked at **high performing** accounts, both based on **social post volume** and **average account volume** and identified accounts with the **strongest** performance in the summer months.

STEP 3

Finally, using Ground Signal's **proprietary menu data**, and **Anonymized Depletion Benchmarks** we further analyze these accounts' competitive dynamics and provide category level estimates for the value of "winning" in these accounts.













SOCIAL DATA INSIGHTS

OCCASIONS

What Occasions see the strongest seasonal uplift in the Summer Season?

Calendar-fixed moments like Fourth of July, Father's Day, and Pride Month naturally see the strongest pickup in consumer mention share during the summer months. But the summer conversation extends well beyond the holidays — outdoor gatherings like block parties and barbecues, social occasions like girl dinners and bachelor parties, and seasonal sports including baseball, soccer, and golf also see meaningful uplift.











Top Occasions in Summer Months:

 Fourth of July	▲ 256%
 Father's Day	▲ 244%
 Pride Month	▲ 148%
 U.S. Open	▲ 75%
 Block Party	▲ 40%
 Soccer	▲ 32%
 Labor Day	▲ 29%
 Girl Dinner	▲ 26%
 Golf	▲ 24%
 Bachelor Party	▲ 22%

What Environments see the largest seasonal increase in consumer mentions?

The environments with the strongest summer pickup are largely defined by outdoor venue characteristics — pools, rooftops, patios, beaches, and waterfronts all see meaningful lifts in consumer mention share, reflecting how physical venue features shape summer consumption. Additionally, Music Festivals emerge as a distinct environment, while LGBTQ+-related environments’ seasonal uplift reinforces the importance of Pride Month as an On-Premise driver.

Top Environments in Summer Months:

	Swimming Pool	▲ 47%
	Music Festival	▲ 26%
	LGBTQ+	▲ 23%
	Rooftop	▲ 20%
	Patio	▲ 15%
	Golf	▲ 14%
	Beach	▲ 11%
	Dog Friendly	▲ 10%
	Waterfront	▲ 8%
	Bar Games	▲ 7%

COCKTAILS

What Cocktails see social mention spikes during the summer season?

Warm-weather serves see meaningful uplift in consumer mention share during the summer months. Frozen cocktails like Frosé and Piña Colada offer cold, high-volume refreshment; spritzes like Limoncello and Aperol Spritz deliver light, effervescent sipping for extended outdoor occasions; and just outside the top ten, Caribbean rum staples like the Sea Breeze and Rum Runner carry built-in warm-weather associations.

Top Summer Months Consumer Cocktails:











	Limoncello Spritz	▲ 74%
	Frosé	▲ 74%
	Lemonade Cocktails	▲ 70%
	Hugo Spritz	▲ 63%
	Sno Cone	▲ 50%
	Aperol Spritz	▲ 47%
	Piña Colada	▲ 43%
	Orange Crush	▲ 40%
	Spritz	▲ 40%

FLAVORS

What Cocktail Flavors see the largest increase in consumer mentions?

Bright and fresh flavors see the strongest uplift in consumer mention share during the summer months. Seasonal fruits like watermelon, peach, and blueberry lead the way, followed by tart and citrus flavors like lemonade and lemon, and fresh herbal notes like basil, mint, and cucumber. Just outside the top ten, tropical flavors like passion fruit, coconut and mango echo the pickup in warm-weather rum-based serves.

Top Cocktail Flavors in Summer Months

 Watermelon	▲ 86%
 Peach	▲ 38%
 Lemonade	▲ 37%
 Basil	▲ 31%
 Tropical	▲ 29%
 Blueberry	▲ 28%
 Mint	▲ 25%
 Lemon	▲ 24%
 Cucumber	▲ 23%
 Passionfruit	▲ 22%



TOP SUMMER VENUES



THE CROW'S NEST

What does a top Summer Season venue look like?

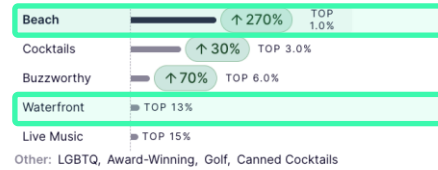
Restaurants with a lively vibe, combining great food, music, and a buzzing social scene.

A restaurant offering a casual atmosphere with outdoor seating and a fireplace, known for great cocktails and a waterfront view.

📍 4 Old West Lake Dr, Montauk, NY 11954 📞 (631) 668-2077 🌐 [Website](#)

Experience

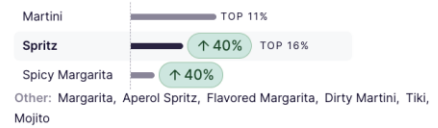
Environment



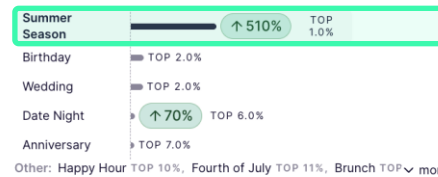
Alcohol



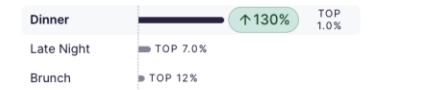
Cocktails



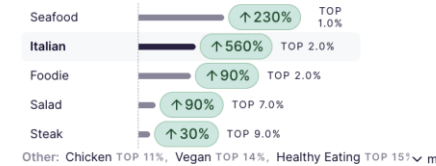
Occasions



Time Of Day

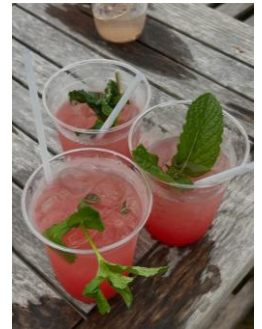


Food



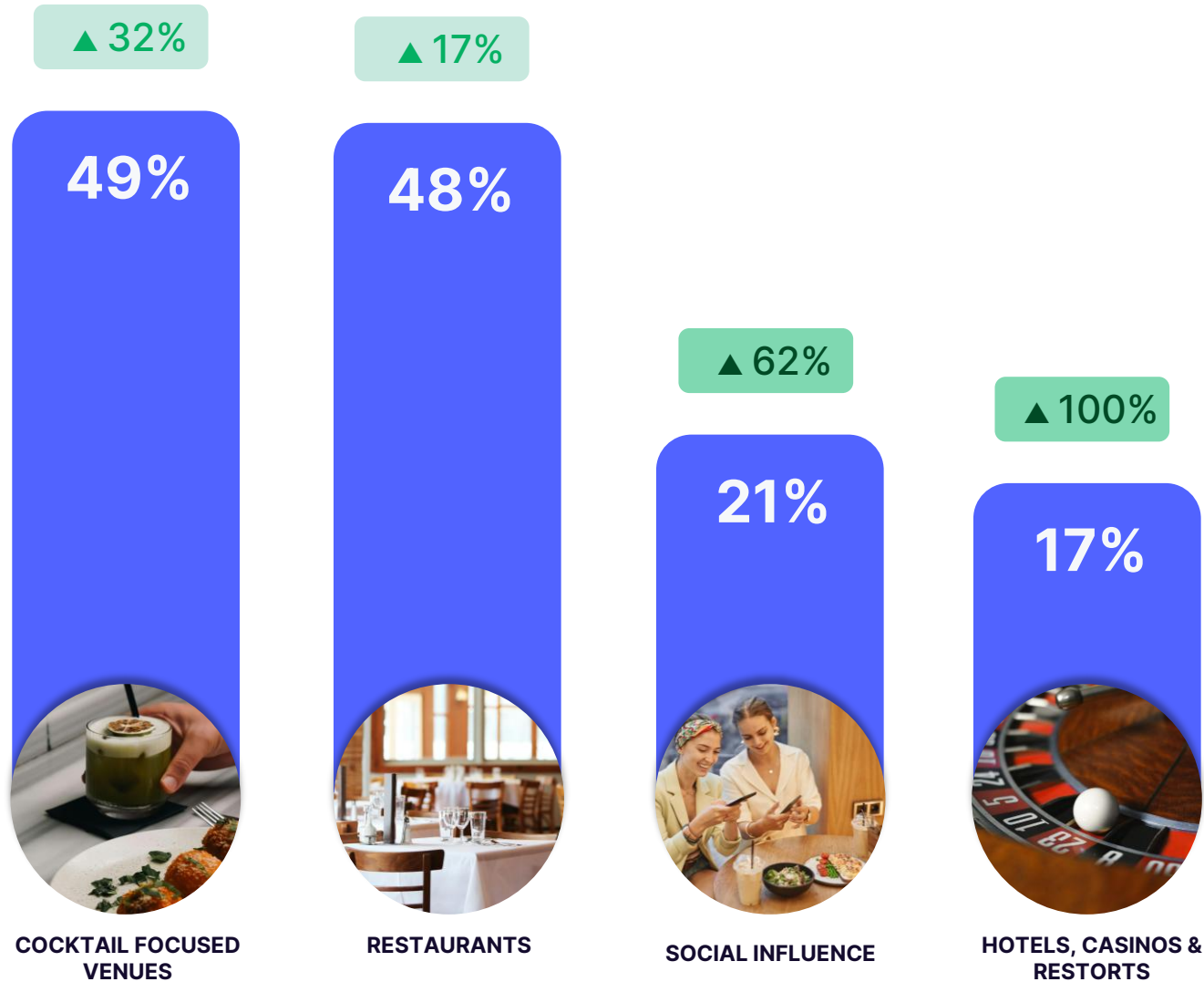
Relationships

Most Active



Key Trade Channel Analysis

Hotels' share of top summer accounts is twice that of high-volume accounts generally. While somewhat surprising, this does align with the seasonal prominence of pool environments. Restaurants, cocktail focused venues and those whose patrons have large social media followings are also more heavily represented among top summer accounts





MENU ANALYTICS

What Categories are featured most often on Top Summer Account Menus?

All categories carry higher menu share in top summer accounts than the on-premise generally, suggesting a broader and deeper spirits offering across these venues. While Vodka and Tequila hold the top two positions by menu share — consistent with the national landscape — Gin and Aperitifs demonstrate large increases in menu share versus the broader on-premise, likely reflecting the cocktail-focused nature of these account profiles.

Top Categories by Menu Share in Top Summer Accounts:



VODKA

87%

▲ 18%



TEQUILA

83%

▲ 11%



LIQUEURS

82%

▲ 19%



WHISKEY

79%

▲ 28%



RUM

70%

▲ 25%



GIN

69%

▲ 41%



APERITIF

61%

▲ 65%



COGNAC

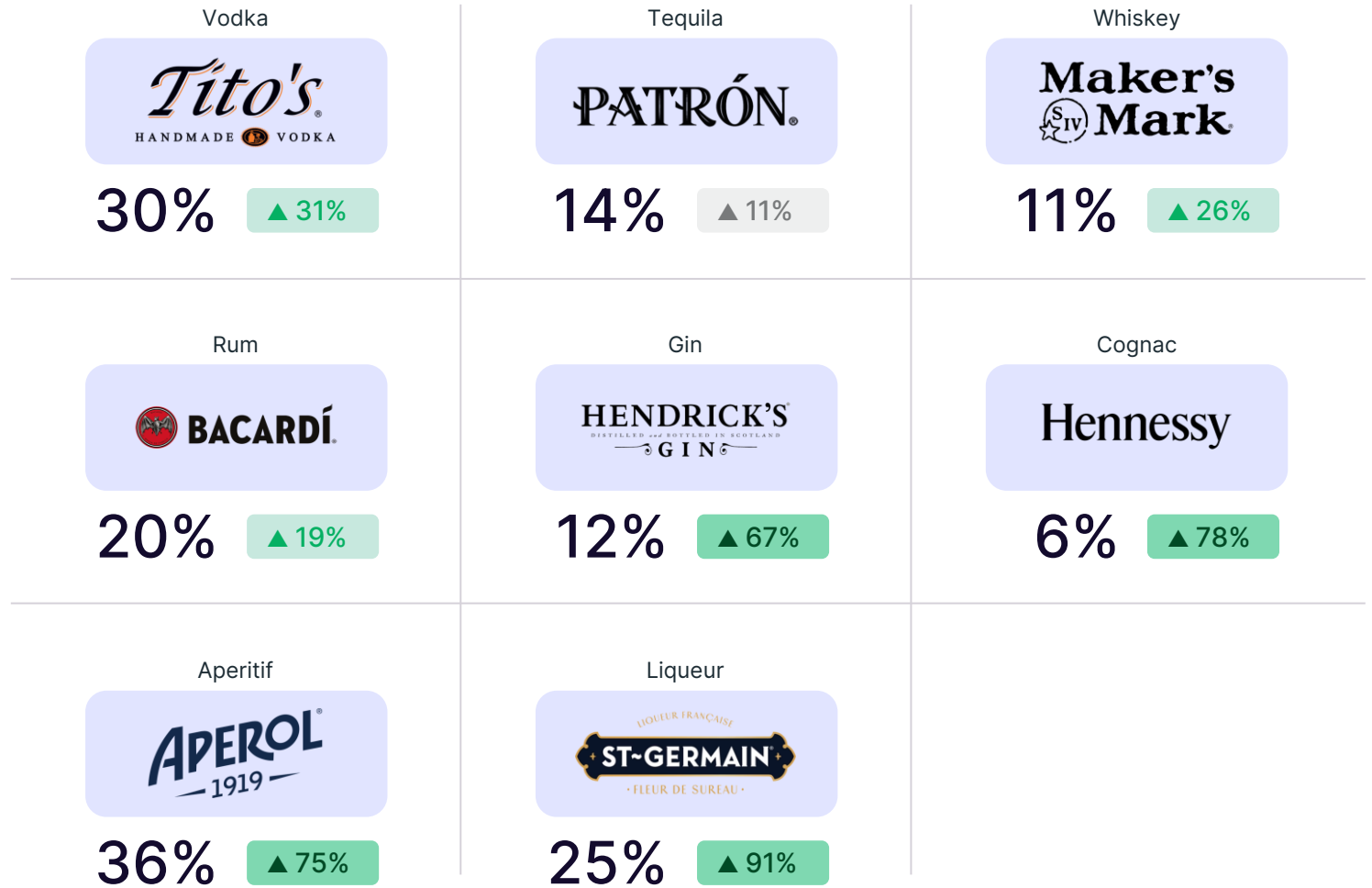
29%

▲ 60%

What Brands are leading Top Summer Account Menus?

The leading brands in top summer accounts largely reflect the leading brands nationally. Aperol and St. Germain lead their respective categories and carry significantly higher menu share in top summer accounts than in the on-premise generally, reinforcing the importance of spritzes on these menus.

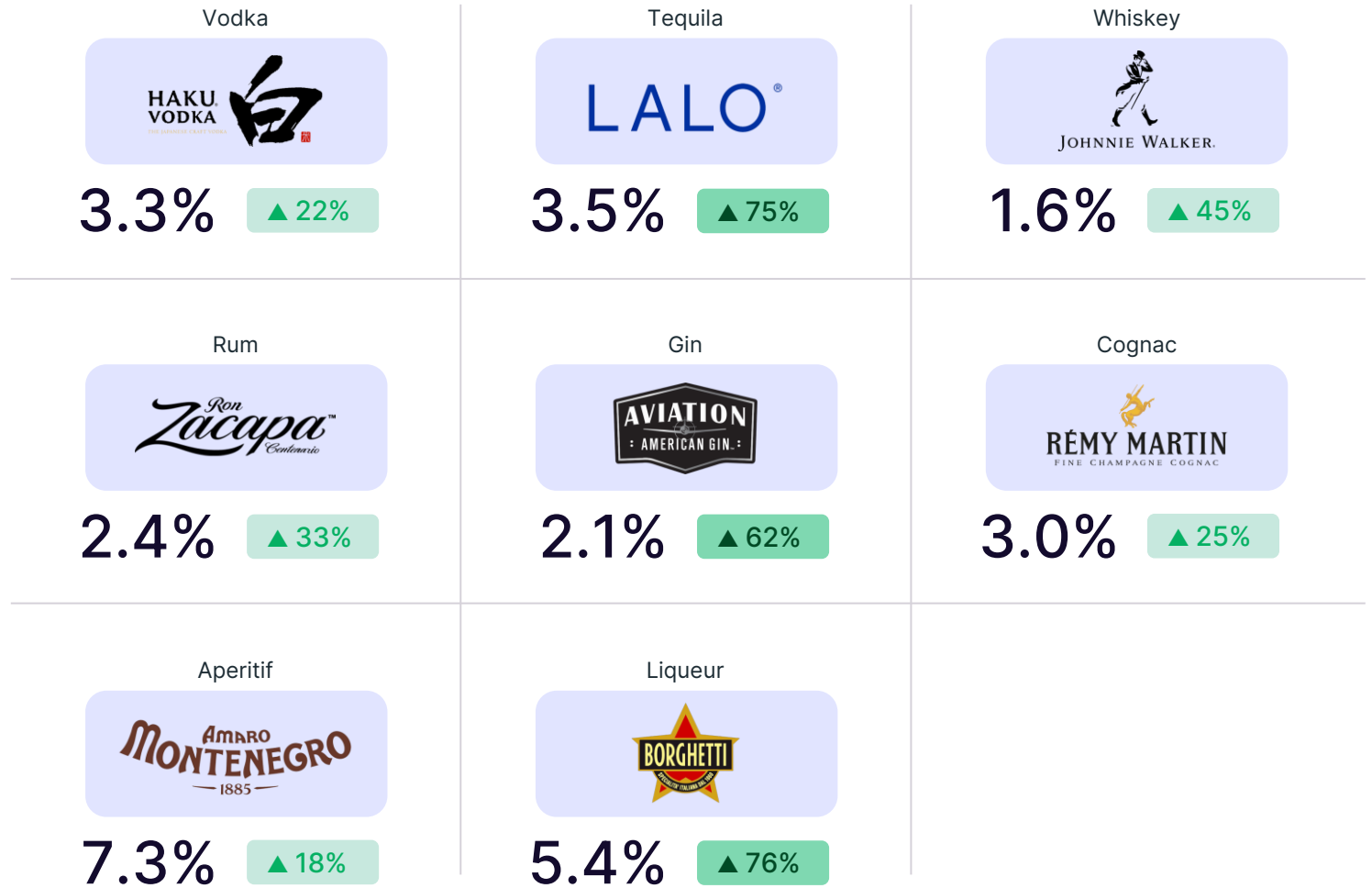
Top Brands by Menu Share in Top Summer Accounts:



What Brands are growing the fastest in Top Summer Accounts?

Diageo leads the brand momentum story in top summer accounts, with Johnnie Walker, Zacapa, and Aviation Gin each gaining the most menu share in their respective categories. The fastest-growing brands are generally sub-5% menu share and owned by larger spirits companies, suggesting craft suppliers are not yet breaking into these accounts at scale.

Trending Brands by Menu Share in Top Summer Accounts:



COCKTAILS

What Cocktails are most frequently found on menu in Top Summer Accounts?









Menus at top summer accounts reflect both seasonal consumer preferences and the cocktail-forward nature of these venues. Spritzes appear at a higher rate than on-premise accounts generally — aligning with the strong summer pickup in consumer mentions — while “bespoke cocktails”, original serves unique to individual venues, and Espresso Martinis are also more prevalent, consistent with the heavier cocktail focus seen in the trade channel mix.

Top Cocktails by Menu Share in Top Summer Accounts:

Bespoke Cocktails

	Menu Share	Index
 Vodka	61%	+6.6%
 Whiskey	54%	+7.8%
 Tequila	45%	+9.8%
 Rum	42%	9.6%
 Gin	42%	+11%

Classic Cocktails

	Menu Share	Index
 Margarita	53%	+3.9%
 Old Fashioned	43%	+6.0%
 Espresso Martini	37%	+17%
 Martini	36%	+3.2%
 Mimosa	28%	+0%
 Mule	28%	+2.2%
 Spritz	23%	+20%
 Sangria	21%	0%
 Paloma	20%	+5.8%

What Cocktails are gaining menu share in Top Summer Accounts?

The cocktails trending on top summer account menus largely reflect broader on-premise momentum. Lemon Drop Martini, Hugo Spritz, Mocktails, Appletini, and Transfusion are all among the top ten fastest-growing cocktails across all on-premise accounts, with the Vesper Martini the notable addition unique to top summer venues.

Trending Cocktails by Menu Share in Top Summer Accounts:



VESPER MARTINI

2.1%

▲ 412%



LEMON DROP MARTINI

11%

▲ 391%



MOCKTAILS

3.5%

▲ 169%



HUGO SPRITZ

6.2%

▲ 138%



APPLETINI

1.5%

▲ 100%



TRANSFUSION

1.8%

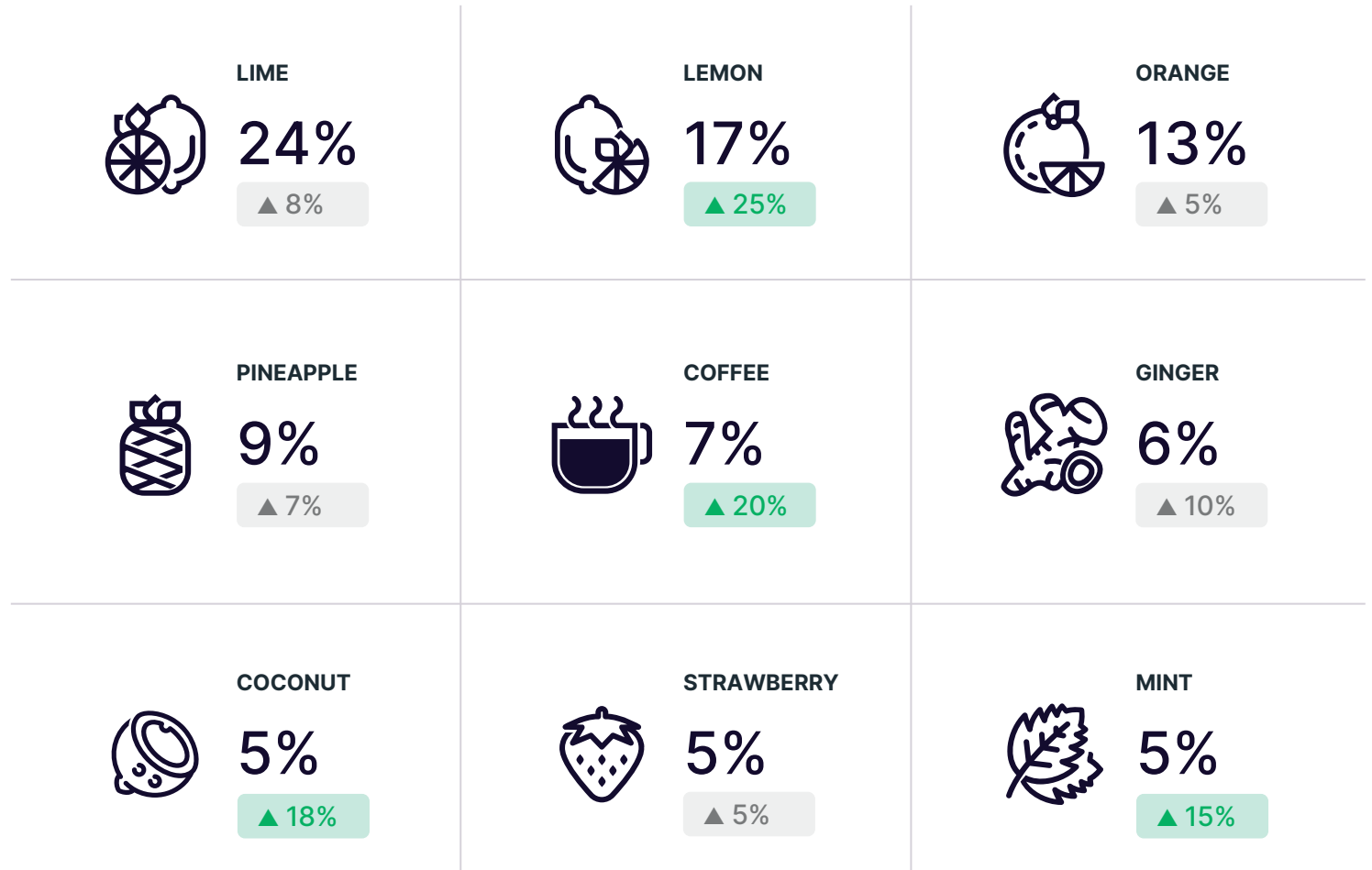
▲ 89%

FLAVORS

What Flavors are most frequently found on menu in Top Summer Accounts?

Lime, Lemon, and Orange lead by cocktail share on top summer account menus, consistent with national patterns. Lemon, Coconut, and Mint index highest relative to the broader on-premise — aligning with the seasonal flavor preferences seen in the consumer data — while Coffee's strong index reflects the prevalence of Espresso Martinis

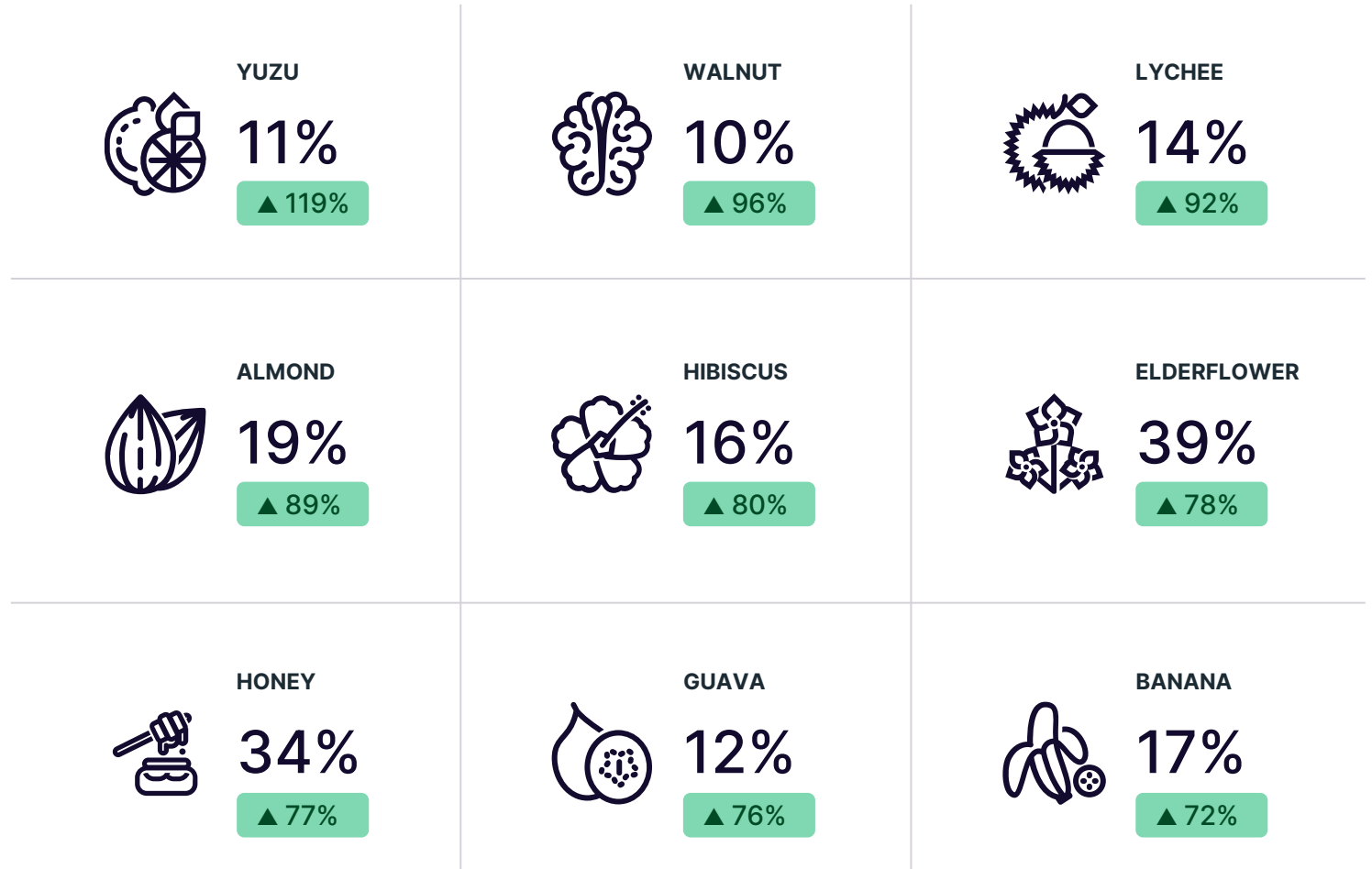
Top Flavors by Cocktail Share in Top Summer Accounts:



What Flavors are gaining menu share in Top Summer Accounts?

The fastest-growing flavors with floral and exotic profiles like elderflower, hibiscus, and yuzu, should continue to see momentum as they align flavors seeing the strongest pickup in summer social conversation. Richer, warmer notes like walnut, almond, and honey are also trending but may see growth slow during the hotter summer months.

Trending Flavors by Menu Share in Top Summer Accounts:





DEPLETION ANALYSIS

AVERAGE ACCOUNT VOLUME

How do average spirits sales per account in Top Summer Venues compare to other high value accounts?

Average account volumes are higher across every category in top summer accounts. Tequila and Whiskey lead from an absolute volume perspective, while Gin, Rum, and Aperitifs see the strongest relative performance — with Aperitifs averaging 84% higher volume in top summer accounts than in high-value accounts generally.

Categories:



Tequila

▲ 29%



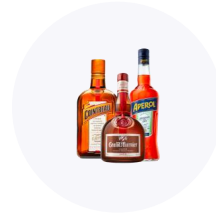
Whiskey

▲ 7%



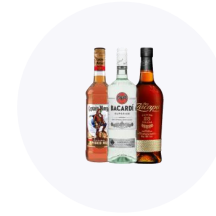
Vodka

▲ 11%



Liqueurs

▲ 17%



Rum

▲ 50%



Gin

▲ 57%



Aperitifs

▲ 84%

PER PLACEMENT VOLUMES

How do per placement volumes in Top Summer Accounts compare to other high value venues?

Per-placement volumes in top summer accounts are strong across the board, with Vodka, Aperitifs, and Rum leading the way. Whiskey is the weakest category in relative terms, but each Whiskey placement in a top summer account still drives roughly 50% more depletions than in high-volume accounts generally — reinforcing that even the relatively weakest category in these venues significantly outperforms the broader on-premise landscape.

Categories:



Vodka

▲ 81%



Rum

▲ 73%



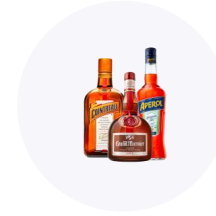
Tequila

▲ 65%



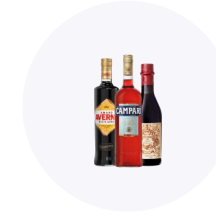
Gin

▲ 68%



Liqueurs

▲ 60%



Aperitifs

▲ 75%



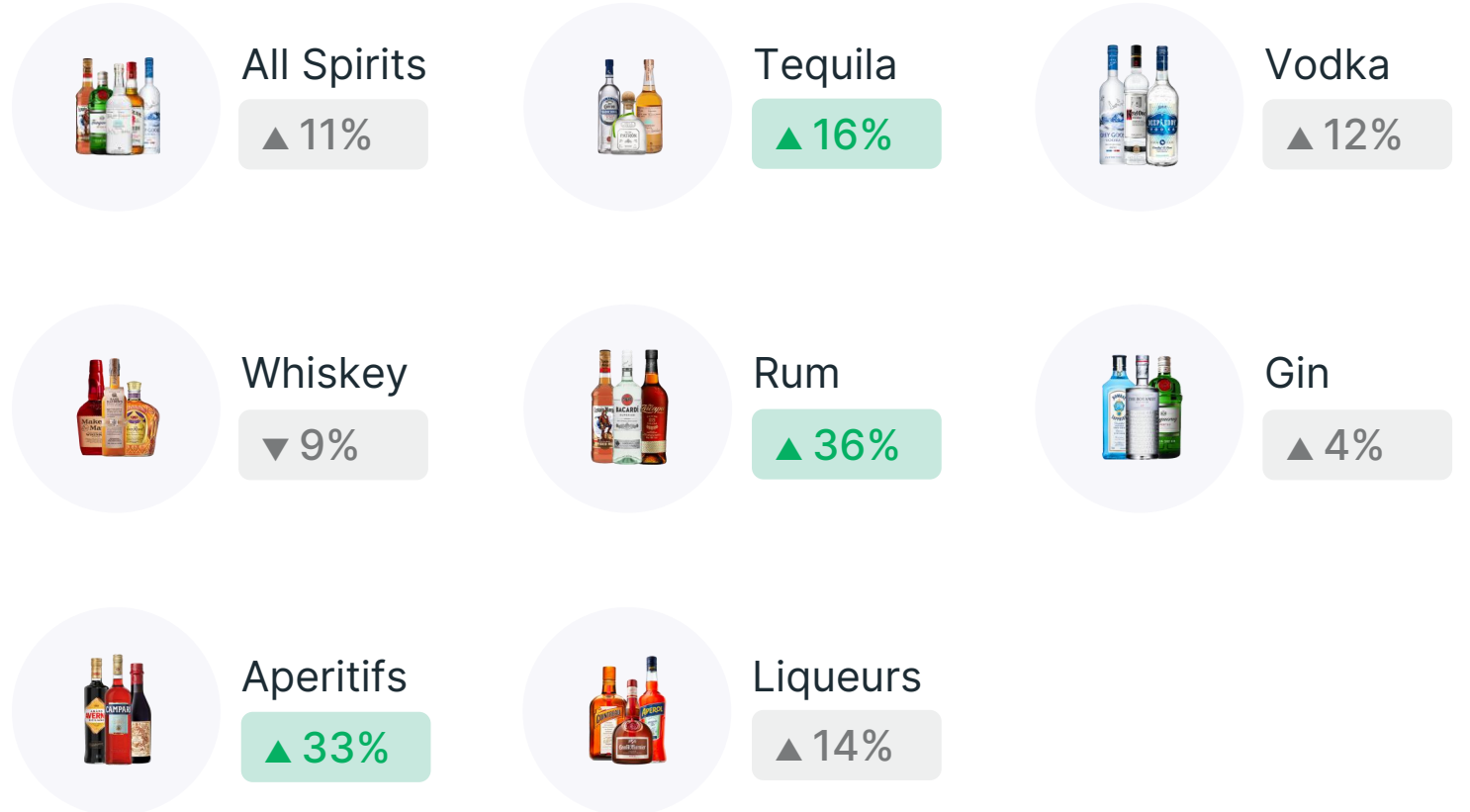
Whiskey

▲ 48%

Summer Seasonality Performance

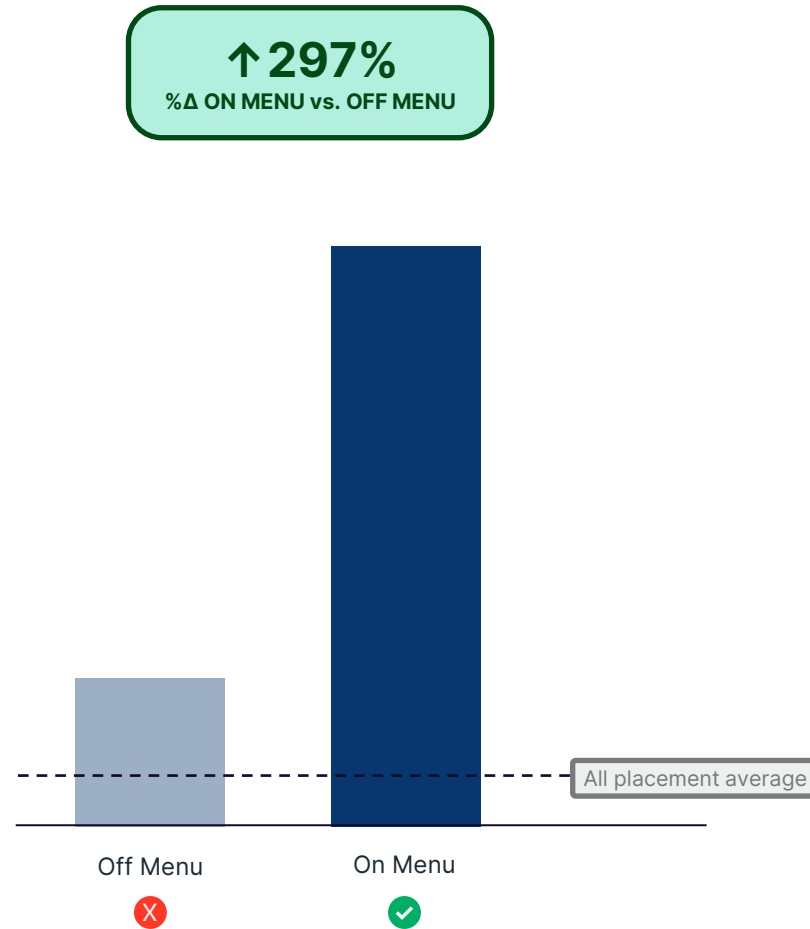
Top summer accounts purchase 11% more spirits during the summer months, with Rum and Aperitifs leading the way with 36% and 33% higher volumes respectively. Tequila, Vodka, and Liqueurs also see double-digit seasonal lifts, while Whiskey is the only category where purchases are higher during the rest of the year. Sales volume is also elevated in May, partially attributable to venues stocking up ahead of the busy season.

Top Performing Categories and Tiers:



How Does Securing a Menu Feature in Top Summer Accounts Impact Sales

Brands featured on cocktail menus in top summer accounts drive nearly 4x the volume per placement of their off-menu counterparts. Whiskey brands see the largest per-placement uplift at +413%, while Vodka and Tequila lead in absolute terms, averaging over 60 cases per account when featured. From a price tier perspective, Premium Plus tiers see strong uplift, with accounts purchasing nearly 7x the volume of ultra-premium brands on menu versus similarly priced brands that are not featured.



Category:

	Whiskey	▲ 413%
	Vodka	▲ 250%
	Tequila	▲ 375%
	Rum	▲ 226%
	Liqueurs	▲ 203%
	Gin	▲ 161%
	Aperitifs	▲ 268%

SUMMER DRINKING SEASONALITY SUMMARY

Focus on the Right Accounts

Ground Signal has identified over **10,000 high-performing** on-premise accounts with strong sales volumes and **meaningful seasonal uplift** in summer foot traffic.

Position Your Brands to Align with Consumer Preferences

Consumer **social data** reveals **clear shifts** in summer consumption patterns — in addition to **summer holidays** mentions of **outdoor gatherings** and **social occasions** like girl dinners and bachelor parties increase. **Outdoor venue environments** like pools, rooftops, and patios all see significant pickup in mention share.

The serves winning in summer align with warmer weather, such as frozen cocktails, spritzes, and tropical rum drinks. **Aperitifs and Rums** see strong increases in both social mentions and depletion volume during the summer months.

The **flavors** picking up in summer are **bright, fresh, and tropical**. If your brand plays in floral, citrus, or exotic fruit profiles, summer is your moment to push. If your brand leans warmer, you may need to reframe the serve to fit the season.

The Commercial Opportunity is Significant.

Top summer accounts **outperform** high-value accounts generally across every spirits category on both average account volume and per-placement basis. Gin, Rum, and Aperitifs see the largest uplift with **Aperitifs** averaging **84% higher volume** than in high-value accounts generally.

Average monthly purchase volumes in Top Summer Accounts **increase by 11%** during the summer months, with **Rum (+36%)** and **Aperitifs (+33%)** seeing the strongest seasonal volume lifts.

Brands **featured on cocktail menus** in these accounts **drive 4x the volume** of off-menu counterparts, with **ultra-premium brands** on menu **averaging 7x** the volume of similarly priced off-menu brands.

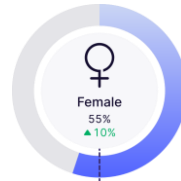


GLOSSARY OF TERMS

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.

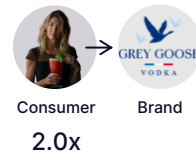
Example: If your audience is 55% female and the background audience is 50/50, your audience skews 10% female.



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.

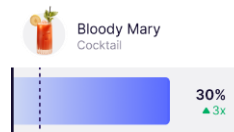
Example: #Patio #Party



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.

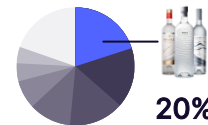
Example: Multicultural Focused High-Energy Dining



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 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

1B+

Monthly Social Posts & Engagements

150M+

Consumer Profiles Analyzed

VENUE

270K+

On-Premise Venues

600+

Unique Venue Attributes

DEPLETIONS

4+

Years Depletion History

2.8K+

SKUs at Account Level

MENU

125K+

On-Premise Accounts w/Monthly Menu Collection

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)



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