

LGBTQ INSIGHTS

NATIONAL





Cocktail Mentions

How popular are top cocktails in LGBTQ environments

For example: Consumers are 135% more likely to mention Mimosa when posting about LGBTQ than in their overall on-premise posts.

Cocktail	Volume	Index vs. Total On-Premise*
MIMOSA		↑ 135%
MARGARITA		↓ 44%
MARTINI		↓ 43%
MOCKTAILS		↑ 84%
TIKI		↑ 19%
SHOTS		↑ 274%
BLOODY MARY		-14%

*Index compared to share of occasion mentions nationally

Which Cocktails are Growing in LGBTQ environments?

For example: Tequila Sunrise share of LGBTQ cocktail mentions increased by 119% nationally over the past two years.

Cocktail	Index vs. Total On-Premise*	2-Year Growth**
TEQUILA SUNRISE	↑ 53%	▲ 119%
GREYHOUND	↑ 619%	▲ 119%
ZOMBIE	↑ 197%	▲ 83%
APPLETINI	↑ 32%	▲ 55%
TOM COLLINS	↑ 113%	▲ 55%
TEQUILA SODA	+7%	▲ 34%
RANCH WATER	↑ 22%	▲ 34%

**Change in share of mentions from Jan 2023 to Dec 2025

Occasion Mentions

How popular are Top Occasions in LGBTQ Environments?

For example: Consumers are 7517% more likely to mention Pride Month when posting about LGBTQ than in their overall on-premise posts.

Occasion	Volume	Index vs. Total On-Premise*
PRIDE MONTH		↑ 7517%
PARTY		↑ 110%
FRIENDS		+7%
BRUNCH		↑ 45%
BIRTHDAY		↓ 52%
LATE NIGHT		↑ 95%
HALLOWEEN		↑ 140%

*Index compared to share of occasion mentions nationally

Which occasions are Growing in LGBTQ Environments

For example: Columbus Day share of LGBTQ occasion mentions increased by 74% nationally over the past two years.

Occasion	Index vs. Total On-Premise*	2-Year Growth**
COLUMBUS DAY	↑ 110%	▲ 74%
GAME NIGHT	↑ 157%	▲ 50%
TRIVIA	↑ 105%	▲ 49%
BLOCK PARTY	↑ 248%	▲ 33%
HAPPY HOUR	+8%	▲ 25%
HALLOWEEN	↑ 140%	▲ 18%
PARTY	↑ 110%	▲ 15%

**Change in share of mentions from Jan 2023 to Dec 2025





Cocktail Categories



For example: 82% of top LGBTQ accounts nationally feature a Vodka cocktail; that category's menu share of LGBTQ has declined 1% year-over-year. American Whiskey is the fastest-growing, with 2% growth since the prior year.

Category	Menu Share	Growth
VODKA	82%	-1%
TEQUILA	77%	—
WHISKEY	74%	—
RUM	65%	-2%
GIN	64%	-1%
AMERICAN WHISKEY	63%	+2%
MEZCAL	37%	—

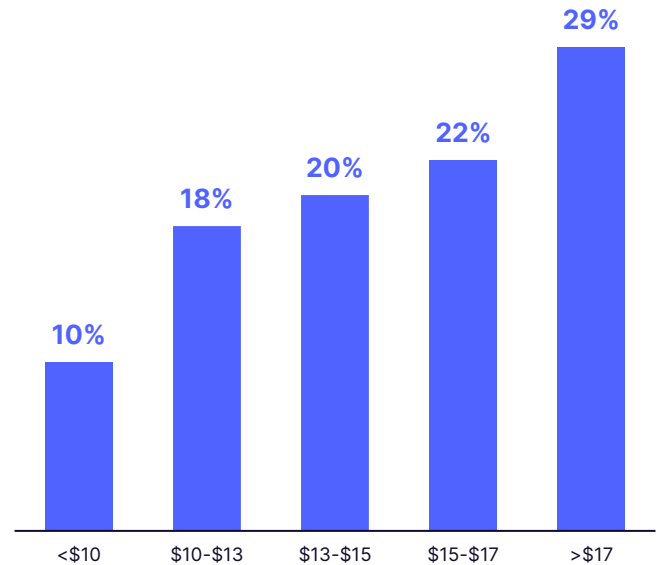
*Change in share of menu placements from Dec 2024 to Dec 2025

Cocktail Price Insights



\$14.11

Average cocktail price in top LGBTQ accounts nationally



LGBTQ Flavors

Top LGBTQ Flavors



Lime is the most common flavor in top LGBTQ accounts, appearing on 74% of menus in December 2025.

Flavor	Menu Share	YoY Growth*
LIME	74%	-1%
LEMON	67%	-2%
ORANGE	66%	-2%
PINEAPPLE	56%	+1%
COFFEE	55%	+11%
GINGER	51%	-1%
GRAPEFRUIT	43%	-2%

*Change in share of menu placements from Dec 2024 to Dec 2025

Growing LGBTQ Flavors



Yuzu is the fastest-growing flavor in top LGBTQ accounts, with 24% growth since the prior year.

Flavor	Menu Share	YoY Growth*
YUZU	9.2%	↗24%
LYCHEE	11%	↗19%
CARAMEL	6.8%	↗15%
PRICKLY PEAR	7.0%	+14%
TANGERINE	2.3%	+14%
COFFEE	55%	+11%
VANILLA	31%	+9%

*Change in share of menu placements from Dec 2024 to Dec 2025





📊 Sales by Category in Top LGBTQ Accounts

For example: In top LGBTQ accounts, Tequila is the best-selling category, averaging 78.1 9L depletions per account in the R12 period ending December 2025. On average, top LGBTQ accounts sell 138% more Tequila than the average account nationally.

CATEGORY	SHARE OF ALL SPIRITS DEPLETIONS (%)	AVERAGE TOTAL ACCOUNT DEPLETIONS (9L/YR)		RELATIVE PERFORMANCE VS. SAME-CATEGORY BENCHMARK	2-YEAR TREND
		TOP ACCOUNTS	ALL ACCOUNTS		
TEQUILA	32%	78.1	32.8	↑138%	-8%
WHISKEY	23%	54.6	29.3	↑86%	-10%
VODKA	20%	53.5	23.3	↑130%	+1%
LIQUEUR	11%	27.2	14.6	↑87%	-2%
RUM	9.4%	25.0	12.9	↑94%	-6%
GIN	4.7%	13.1	5.2	↑152%	-1%
COGNAC	0.6%	3.7	3.1	↑20%	↓15%

📊 Sales by Price Tier in Top LGBTQ Accounts

For example: In top LGBTQ accounts, Standard is the best-selling price tier overall, averaging 86.6 9L depletions per account in the R12 period ending December 2025. That is 95% more Standard depletions than the average account nationally. Over the past two years, average Standard depletions in top LGBTQ accounts have declined by 5%.

PRICE TIER (ALL SPIRITS)	SHARE OF ALL SPIRITS DEPLETIONS (%)	AVERAGE TOTAL ACCOUNT DEPLETIONS (9L/YR)		RELATIVE PERFORMANCE VS. SAME-TIER BENCHMARK	2-YEAR TREND
		TOP ACCOUNTS	ALL ACCOUNTS		
LUXURY	0.1%	0.76	0.49	↑55%	+6%
PRESTIGE	0.5%	2.3	1.1	↑104%	-4%
ULTRA PREMIUM	13%	34.6	13.9	↑149%	↓15%
SUPER PREMIUM	14%	37.0	14.6	↑154%	+2%
PREMIUM	30%	75.0	33.8	↑122%	-9%
STANDARD	35%	86.6	44.3	↑95%	-5%
VALUE	7.6%	38.6	18.7	↑107%	+2%

