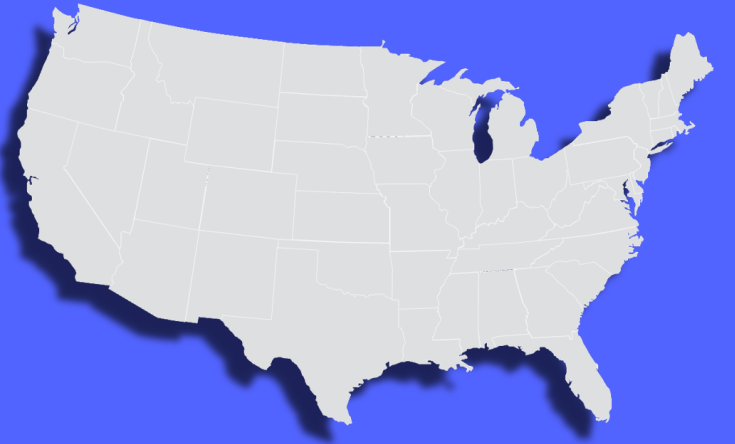


NATIONAL MENU INSIGHTS REPORT



Q2 2026 YoY

GROUND SIGNAL

Ground Signal captures online menus at over 120,000 venues nationwide. Using sophisticated AI tools, we extract relevant information and provide it in an easy-to-analyze format.



Accounts Overview

 **106K**
Accounts w/
Menu

 **102K**
Accounts w/
Cocktail Menu

 **1.57M**
Total # of
Cocktails

 **\$12.95**
Average
Cocktail Price

Breakdown by Spirits Category



Most Popular Classic Cocktails

COCKTAIL	MENU SHARE*
 MARGARITA	56%
 OLD FASHIONED	36%
 ESPRESSO MARTINI	28%
 MARTINI	28%
 BLOODY MARY	25%
 SANGRIA	23%
 MULE	22%
 MIMOSA	21%
 MOJITO	20%
 PALOMA	17%

*Percentage of cocktail menus that feature this cocktail



BOURBON WHISKEY

MENU PERFORMANCE

NATIONAL ACCOUNTS

Q2 2026 YoY



Ground Signal calculates menu share for each Bourbon Whiskey brand by taking the number of menus featuring a cocktail with that brand, then dividing that number by the total number of menus that have at least one Bourbon Whiskey cocktail.



Bourbon Whiskey Cocktail Menu Share

Q2 26

For example: Knob Creek is the 9th-ranked Bourbon Whiskey brand on National cocktail menus, appearing on 4.1% of cocktail menus that have at least one Bourbon Whiskey cocktail.

RANK	BRAND	SUPPLIER	MENU SHARE
1	MAKER'S MARK	SUNTORY	21%
2 ▲1	BULLEIT	DIAGEO	13%
3 ▼1	WOODFORD RESERVE	 BROWN-FORMAN	12%
4	BUFFALO TRACE	SAZERAC	12%
5	FOUR ROSES	 KIRIN	5.4%
6	OLD FORESTER	 BROWN-FORMAN	5.0%
7 ▲3	ANGEL'S ENVY	 BACARDÍ	4.9%
8 ▼1	ELIJAH CRAIG	 HEAVEN HILL BRANDS	4.3%

RANK	BRAND	SUPPLIER	MENU SHARE
9 ▼1	KNOB CREEK	SUNTORY	4.1%
10 ▼1	JIM BEAM	SUNTORY	3.9%
11	BASIL HAYDEN'S	SUNTORY	3.2%
12 ▲5	JEFFERSON'S	 Pernod Ricard	1.9%
13 ▼1	WILD TURKEY	CAMPARI	1.9%
14 ▼1	EVAN WILLIAMS	 HEAVEN HILL BRANDS	1.8%
15 ▼1	HIGH WEST	 Constellation Brands	1.8%
16	1792	SAZERAC	1.6%

By retrieving and analyzing all on-premise venues nationally each month, Ground Signal can show which brands are having a moment — and which are lagging behind their peers. (Limited to the 21 Bourbon Whiskey brands with at least 1% Menu Share in National.)



 Bourbon Whiskey in National: Trending Up
Q2 2026 YoY

BRAND	SUPPLIER	MENU SHARE*	%Δ IN MENU SHARE**
JEFFERSON'S	 Pernod Ricard	1.9%	▲ 76%
WHISTLEPIG	 WHISTLEPIG	1.5%	▲ 58%
BUFFALO TRACE	SAZERAC	12%	▲ 49%
1792	SAZERAC	1.6%	▲ 43%
ANGEL'S ENVY	 BACARDÍ	4.9%	▲ 33%
MICHTER'S	 CHATHAM IMPORTS, INC.	1.5%	▲ 24%
HIGH WEST	 Constellation Brands	1.8%	▲ 23%
LARCENY	 HEAVEN HILL BRANDS	1.0%	▲ 12%

 Bourbon Whiskey in National: Trending Down
Q2 2026 YoY

BRAND	SUPPLIER	MENU SHARE*	%Δ IN MENU SHARE**
BENCHMARK	SAZERAC	1.0%	▼ 2.5%
WILD TURKEY	CAMPARI	1.9%	▼ 2.6%
EVAN WILLIAMS	 HEAVEN HILL BRANDS	1.8%	▼ 3.3%
ELIJAH CRAIG	 HEAVEN HILL BRANDS	4.3%	▼ 4.8%
KNOB CREEK	SUNTORY	4.1%	▼ 5.5%
JIM BEAM	SUNTORY	3.9%	▼ 8.5%
FOUR ROSES	 KIRIN	5.4%	▼ 9.7%
YELLOWSTONE	luxco	1.0%	▼ 11%

*Menu Share is the number of menus with a cocktail featuring that brand divided by the number of menus with a Bourbon Whiskey cocktail.
**For example, a 10% would mean that cocktail's Menu Share grew by 10% (e.g., went from 10.0% to 11.0%), not that it gained 10 percentage points.



Old Fashioned is the most popular Bourbon Whiskey cocktail in National accounts, appearing on 54.1% of menus with at least one Bourbon Whiskey cocktail. Maple Old-Fashioned grew the most, gaining 29.4% Menu Share.



Top Bourbon Whiskey Cocktails

Cocktail	Menu Share*	%Δ in Menu Share**
Old Fashioned	54%	▲ 8.0%
Manhattan	13%	▼ 4.0%
Mule	5.1%	▼ 3.1%
Paper Plane	4.8%	▲ 29%
Bourbon Smash	4.3%	▲ 11%
Whiskey Sour	3.7%	▼ 8.1%
Smash	3.3%	▼ 7.0%

Trending Bourbon Whiskey Cocktails

Cocktail	Menu Share*	%Δ in Menu Share**
Maple Old-Fashioned	2.4%	▲ 29%
Paper Plane	4.8%	▲ 29%
Bourbon Smash	4.3%	▲ 11%
Espresso Martini	1.2%	▲ 9.3%
Old Fashioned	54%	▲ 8.0%
Boulevardier	2.8%	▲ 0.4%
Gold Rush	2.1%	—

Note: Limited to cocktails with at least 1.0% Menu Share

*Menu Share is the number of menus with a cocktail featuring that brand divided by the number of menus with a Bourbon Whiskey cocktail.
**For example, a 10% would mean that cocktail's Menu Share grew by 10% (e.g., went from 10.0% to 11.0%), not that it gained 10 percentage points.



In addition to analyzing menu statistics by geography, Ground Signal also allows you see menu performance by:

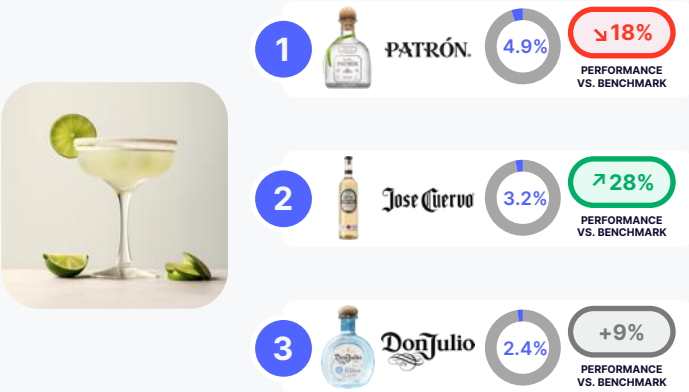
Venue Profile

Example: Top 3 Whiskey Brands in Independent Steak Houses



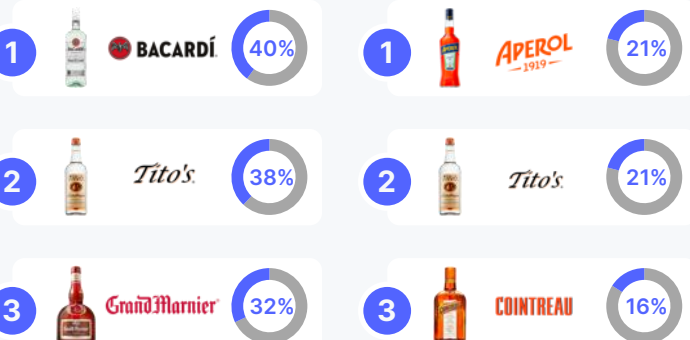
Cocktails

Example: Top 3 Tequila Brands Used in Margaritas Nationwide



Chains vs. Independent Accounts

Example:
Top Brands in Chain Accts Top Brands in Independent Accts



Ground Signal can also provide insights into:



Popular cocktails & their variants
e.g. Tequila Espresso Martini



Flavor Profiles



Pricing





AI Solutions for the Beverage Alcohol Industry

Ground Signal's 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 allow the industry to **better align its offerings, delight consumers** and **increase sales!**

CAPABILITIES:

CONSUMER INSIGHTS

MENU ANALYSIS

MARKET TRENDS

GO-TO-MARKET STRATEGY

NATIONAL ACCOUNTS

TARGET ACCOUNT LIST
(GS TARGET)

ACCOUNT SEGMENTATION
& KEY TRADE CHANNELS

CONSUMER

VENUE

DEPLETIONS

MENU

1B+

Monthly
Social Posts

250K+

On-Premise
Venues

3+

Years Depletion
History

120K+

On-Premise
Menus

100M

U.S. Legal
Drinking Age
Consumers

600+

Unique
Venue
Attributes

2K+

SKUs at
Account Level

3K+

Spirits,
Cocktails, Wine
Varietals and
Flavor Profiles

For more information on menu or other capabilities
please contact sales@groundsignal.ai