

DAY DRINKING INSIGHTS

NATIONAL





Consumer Cocktail Mentions

Top Cocktails



For example: Consumers are 11% less likely to mention Margarita when posting about Day Drinking than in their overall on-premise posts.

Cocktail	Volume	Index vs. Total On-Premise*
MARGARITA		-11%
MIMOSA		↑ 85%
MARTINI		↓ 38%
BLOODY MARY		↑ 160%
TIKI		↑ 19%
ESPRESSO MARTINI		↓ 19%
SPRITZ		-2%

*Index compared to share of occasion mentions nationally

Trending Cocktails



For example: Screwdriver share of Day Drinking cocktail mentions increased by 162% nationally over the past two years.

Cocktail	Index vs. Total On-Premise*	2-Year Growth**
SCREWDRIVER	↑ 627%	▲ 162%
CAIPIRINHA	↑ 90%	▲ 162%
GIMLET	↑ 31%	▲ 162%
SWIZZLE	↑ 189%	▲ 162%
JACK COKE	↑ 683%	▲ 114%
MINT JULEP	↑ 24%	▲ 85%
LEMON DROP	↑ 22%	▲ 76%

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



Consumer Occasion Mentions

Top Occasions



For example: Consumers are 58% less likely to mention Friends when posting about Day Drinking than in their overall on-premise posts.

Occasion	Volume	Index vs. Total On-Premise*
FRIENDS		↓ 58%
BRUNCH		↑ 50%
HAPPY HOUR		↑ 70%
PARTY		↓ 43%
SPORTS		↓ 24%
BIRTHDAY		↓ 78%
LATE NIGHT		↓ 40%

*Index compared to share of occasion mentions nationally

Trending Occasions



For example: Hockey share of Day Drinking occasion mentions increased by 193% nationally over the past two years.

Occasion	Index vs. Total On-Premise*	2-Year Growth**
HOCKEY	↑ 24%	▲ 193%
MARCH MADNESS	↑ 149%	▲ 62%
SPRING BREAK	+5%	▲ 53%
BASKETBALL	↑ 117%	▲ 36%
KENTUCKY DERBY	+1%	▲ 31%
ST PATRICKS DAY	↑ 260%	▲ 29%
APRES SKI	↑ 34%	▲ 20%

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





Cocktail Categories



For example: 81% of top Day Drinking accounts nationally feature a Vodka cocktail; that category's menu share of Day Drinking has declined 2% year-over-year. American Whiskey is the fastest-growing, with 3% growth since the prior year.

Category	Menu Share	Growth
VODKA	81%	-2%
TEQUILA	75%	-1%
WHISKEY	72%	—
RUM	62%	-3%
AMERICAN WHISKEY	61%	+3%
GIN	56%	—
MEZCAL	27%	-1%

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

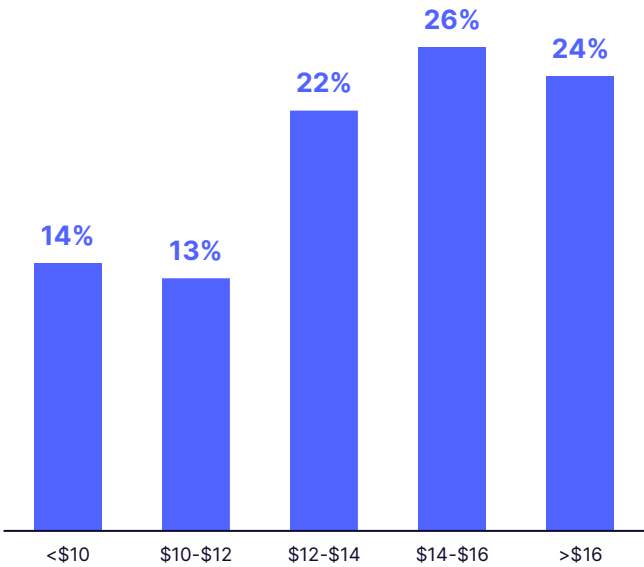


Cocktail Price Insights



\$12.77

Average cocktail price in top Day Drinking accounts nationally



Day Drinking Flavors

Top Day Drinking Flavors



Lime is the most common flavor in top Day Drinking accounts, appearing on 72% of menus in December 2025.

Flavor	Menu Share	YoY Growth*
LIME	72%	-4%
ORANGE	66%	-4%
LEMON	63%	-3%
PINEAPPLE	55%	-2%
GINGER	50%	-5%
COFFEE	50%	+4%
SPICY	45%	—

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

Trending Day Drinking Flavors



Tangerine is the fastest-growing flavor in top Day Drinking accounts, with 42% growth since the prior year.

Flavor	Menu Share	YoY Growth*
TANGERINE	2.2%	↗42%
YUZU	4.6%	↗26%
LYCHEE	5.5%	↗18%
APRICOT	5.3%	+7%
NUTMEG	6.6%	+6%
ELDERFLOWER	28%	+6%
GRAPE	5.9%	+6%

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





Sales by Category in Top Day Drinking Accounts

For example: In top Day Drinking accounts, Tequila is the best-selling category, averaging 74.8 9L depletions per account in the R12 period ending December 2025. On average, top Day Drinking accounts sell 128% more Tequila than the average account nationally.

CATEGORY	SHARE OF ALL SPIRITS DEPLETIONS (%)	AVERAGE TOTAL ACCOUNT DEPLETIONS (9L/YR)		AVERAGE ACCOUNT DEPLETIONS VS. BENCHMARK	2-YEAR TREND IN AVERAGE ACCOUNT DEPLETIONS
		TOP ACCOUNTS	ALL ACCOUNTS		
TEQUILA	30%		74.8 32.8	↑128%	-10%
VODKA	23%		58.7 23.3	↑152%	-2%
WHISKEY	21%		51.4 29.3	↑75%	-13%
LIQUEUR	12%		28.9 14.6	↑98%	-1%
RUM	10%		26.7 12.9	↑107%	-6%
GIN	3.5%		9.7 5.2	↑87%	-2%
COGNAC	0.5%		3.4 3.1	+11%	+4%

Sales by Price Tier in Top Day Drinking Accounts

For example: In top Day Drinking accounts, Standard is the best-selling price tier overall, averaging 104.7 9L depletions per account in the R12 period ending December 2025. That is 136% more Standard depletions than the average account nationally. Over the past two years, average Standard depletions in top Day Drinking accounts have declined by 6%.

PRICE TIER (ALL SPIRITS)	SHARE OF ALL SPIRITS DEPLETIONS (%)	AVERAGE TOTAL ACCOUNT DEPLETIONS (9L/YR)		AVERAGE ACCOUNT DEPLETIONS VS. BENCHMARK	2-YEAR TREND IN AVERAGE ACCOUNT DEPLETIONS
		TOP ACCOUNTS	ALL ACCOUNTS		
LUXURY	0.1%		0.53 0.49	+8%	+5%
PRESTIGE	0.3%		1.4 1.1	↗21%	-4%
ULTRA PREMIUM	8.7%		23.1 13.9	↑66%	↘22%
SUPER PREMIUM	10%		26.4 14.6	↑81%	+2%
PREMIUM	28%		68.8 33.8	↑104%	-12%
STANDARD	42%		104.7 44.3	↑136%	-6%
VALUE	10%		40.9 18.7	↑119%	-1%

