

HIGHBALL INSIGHTS

NATIONAL





Category Mentions

Top Categories



For example: Consumers are 187% more likely to mention Whiskey when posting about Highball than in their overall on-premise posts.

Category	Volume	Index vs. Total On-Premise*
WHISKEY		↑187%
AMERICAN WHISKEY		↑50%
TEQUILA		↓41%
GIN		↑144%
VODKA		-3%
RUM		+9%
LIQUEUR		↑54%

*Index compared to share of occasion mentions nationally

Trending Categories



For example: American Whiskey share of Highball category mentions increased by 8% nationally over the past two years.

Category	Index vs. Total On-Premise*	2-Year Growth**
AMERICAN WHISKEY	↑50%	▲8.3%
RUM	+9%	▲8.0%
GIN	↑144%	▲4.9%

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

Occasion Mentions

Top Occasions



For example: Consumers are 624% more likely to mention Happy Hour when posting about Highball than in their overall on-premise posts.

Occasion	Volume	Index vs. Total On-Premise*
HAPPY HOUR		↑624%
FRIENDS		+10%
DINNER		+5%
PARTY		↑41%
LATE NIGHT		↑235%
BIRTHDAY		↓66%
DATE NIGHT		↑25%

*Index compared to share of occasion mentions nationally

Trending Occasions



For example: Valentines Day share of Highball occasion mentions increased by 120% nationally over the past two years.

Occasion	Index vs. Total On-Premise*	2-Year Growth**
VALENTINES DAY	↑51%	▲120%
LATE NIGHT	↑235%	▲35%
HALLOWEEN	+3%	▲27%
PARTY	↑41%	▲27%
CINCO DE MAYO	↑69%	▲27%
LABOR DAY	↑43%	▲27%
FRIENDS	+10%	▲10%

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





Highball Categories



For example: 48% of accounts nationally with a Highball feature Whiskey; that category's menu share of Highball has declined 4% year-over-year. Mezcal is the fastest-growing, with 41% growth since the prior year.

Category	Menu Share	Growth
WHISKEY	48%	-4%
AMERICAN WHISKEY	16%	+11%
GIN	13%	-10%
VODKA	12%	-12%
TEQUILA	7.0%	↘ 25%
RUM	4.9%	↘ 16%
MEZCAL	2.3%	↗ 41%

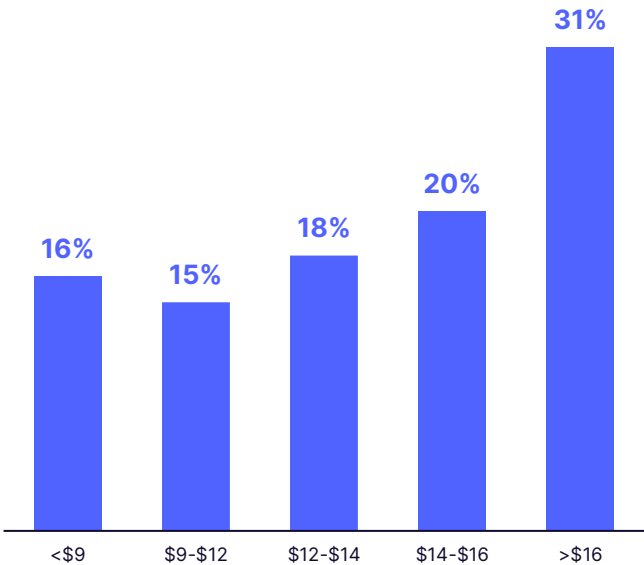
*Change in share of menu placements from Dec 2024 to Dec 2025

Cocktail Price Insights



\$13.17

Average Highball price nationally



Highball Flavors

Top Highball Flavors



Lemon is the most common flavor in Highballs, appearing in 27% of Highballs on menu in December 2025.

Flavor	Cocktail Share	YoY Growth*
LEMON	27%	-1%
LIME	15%	↘ 16%
GINGER	9.9%	-9%
YUZU	7.1%	-2%
HONEY	5.8%	↗ 35%
ORANGE	5.5%	↘ 24%
GRAPEFRUIT	5.3%	↘ 22%

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

Growing Highball Flavors



Cinnamon is the fastest-growing flavor in Highballs, with 185% growth since the prior year.

Flavor	Cocktail Share	YoY Growth*
CINNAMON	0.9%	↗ 185%
WATERMELON	1.0%	↗ 184%
BERRY	0.5%	↗ 107%
BLACKBERRY	1.1%	↗ 84%
TROPICAL	0.5%	↗ 84%
BLUEBERRY	1.0%	↗ 70%
VANILLA	1.3%	↗ 63%

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





Sales by Category in Top Highball Accounts

For example: In top Highball accounts, Whiskey is the best-selling category, averaging 47.6 9L depletions per account in the R12 period ending December 2025. On average, top Highball accounts sell 62% more Whiskey than the average account nationally.

CATEGORY	SHARE OF ALL SPIRITS DEPLETIONS (%)	AVERAGE TOTAL ACCOUNT DEPLETIONS (9L/YR)		AVERAGE ACCOUNT DEPLETIONS VS. MARKET SAME-TIER BENCHMARK	2-YEAR TREND IN AVERAGE ACCOUNT DEPLETIONS
		TOP ACCOUNTS	ALL ACCOUNTS		
WHISKEY	 29%		47.6 29.3	↑62%	-7%
TEQUILA	 26%		45.5 32.8	↑39%	-8%
VODKA	 19%		33.7 23.3	↑45%	+2%
LIQUEUR	 11%		18.8 14.6	↑29%	+3%
RUM	 7.1%		13.9 12.9	+8%	-5%
GIN	 6.5%		11.9 5.2	↑129%	-1%
COGNAC	 0.7%		2.9 3.1	-8%	-6%



Sales by Price Tier in Top Highball Accounts

For example: In top Highball accounts, Premium is the best-selling price tier overall, averaging 54.0 9L depletions per account in the R12 period ending December 2025. That is 60% more Premium depletions than the average account nationally. Over the past two years, average Premium depletions in top Highball accounts have declined by 13%.

PRICE TIER (ALL SPIRITS)	SHARE OF ALL SPIRITS DEPLETIONS (%)	AVERAGE TOTAL ACCOUNT DEPLETIONS (9L/YR)		AVERAGE ACCOUNT DEPLETIONS VS. MARKET SAME-TIER BENCHMARK	2-YEAR TREND IN AVERAGE ACCOUNT DEPLETIONS
		TOP ACCOUNTS	ALL ACCOUNTS		
LUXURY	 0.1%		0.70 0.49	↑42%	-2%
PRESTIGE	 0.7%		1.9 1.1	↑68%	-4%
ULTRA PREMIUM	 12%		21.1 13.9	↑51%	-5%
SUPER PREMIUM	 23%		39.6 14.6	↑172%	+7%
PREMIUM	 32%		54.0 33.8	↑60%	-13%
STANDARD	 29%		50.7 44.3	+14%	-5%
VALUE	 4.4%		20.2 18.7	+8%	+2%

