

GIN & TONIC INSIGHTS

NATIONAL





Occasion Mentions

Top Occasions



For example: Consumers are 50% more likely to mention Dinner when posting about Gin & Tonic than in their overall on-premise posts.

Occasion	Volume	Index vs. Total On-Premise*
DINNER		↑ 50%
HAPPY HOUR		↑ 464%
FRIENDS		↓ 23%
BRUNCH		↑ 56%
PARTY		↓ 31%
LATE NIGHT		↑ 44%
TRAVEL		+10%

*Index compared to share of occasion mentions nationally

Trending Occasions



For example: BBQ (Occasion) share of Gin & Tonic occasion mentions increased by 89% nationally over the past two years.

Occasion	Index vs. Total On-Premise*	2-Year Growth**
BBQ (OCCASION)	↑ 127%	▲ 89%
VALENTINES DAY	↑ 277%	▲ 75%
TRIVIA	↑ 26%	▲ 52%
FATHERS DAY	↑ 63%	▲ 24%
DINNER	↑ 50%	▲ 17%
BRUNCH	↑ 56%	▲ 13%
CINCO DE MAYO	+5%	▲ 1.1%

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

Environment Mentions

Top Environments



For example: Consumers are 167% more likely to mention Patio when posting about Gin & Tonic than in their overall on-premise posts.

Environment	Volume	Index vs. Total On-Premise*
PATIO		↑ 167%
TOP RESTAURANTS		↑ 770%
ROOFTOP		↑ 200%
DANCING		↓ 46%
TAPROOM		↑ 344%
BEACH		↓ 17%
WATERFRONT		↑ 190%

*Index compared to share of occasion mentions nationally

Trending Environments



For example: Waterfront share of Gin & Tonic environment mentions increased by 243% nationally over the past two years.

Environment	Index vs. Total On-Premise*	2-Year Growth**
WATERFRONT	↑ 190%	▲ 243%
TAPROOM	↑ 344%	▲ 88%
LINE DANCING	↑ 160%	▲ 71%
TOP RESTAURANTS	↑ 770%	▲ 37%
SWIMMING POOL	↑ 40%	▲ 21%
BAR GAMES	↑ 107%	▲ 21%
ROOFTOP	↑ 200%	▲ 4.0%

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





Flavors in Gin & Tonic



For example: 23% of accounts nationally with a Gin & Tonic feature Lime flavor; that flavor's menu share of Gin & Tonic has declined 5% year-over-year. Orange is the fastest-growing, with 16% growth since the prior year.

Flavor	Cocktail Share	YoY Growth*
LIME	23%	-5%
LEMON	16%	↓17%
ORANGE	9.1%	↑16%
CUCUMBER	8.3%	↓19%
ELDERFLOWER	7.8%	-5%
GRAPEFRUIT	6.1%	↓18%
BERRY	3.9%	↓19%

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

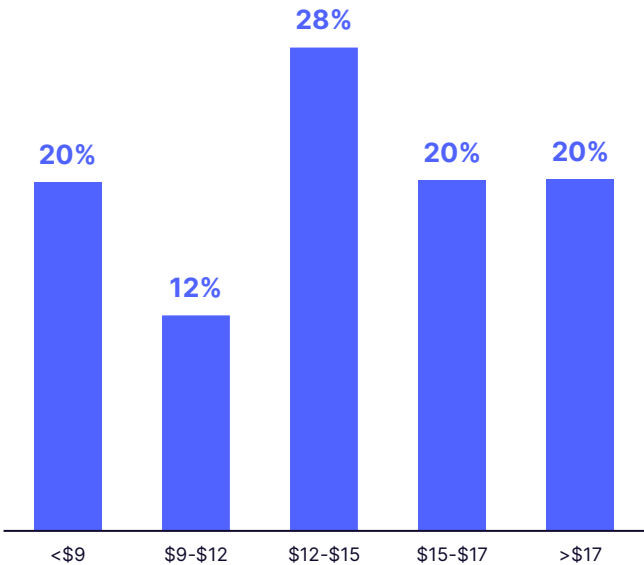


Cocktail Price Insights



\$13.28

Average Gin & Tonic price nationally



Other Cocktails on Gin & Tonic Menus

Top Cocktails



Margarita is the most common cocktail also found on menus serving Gin & Tonic, appearing on 68% of Gin & Tonic menus in December 2025.

Cocktail	Cocktail Share	Growth
MARGARITA	68%	+12%
OLD FASHIONED	61%	↑18%
MARTINI	45%	+7%
ESPRESSO MARTINI	44%	↑29%
MANHATTAN	33%	↑19%
MULE	32%	+2%
MIMOSA	28%	+7%

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

Growing Cocktails



Lemon Drop Martini is the fastest-growing cocktail also found on menus serving Gin & Tonic, with 407% growth since the prior year.

Cocktail	Cocktail Share	Growth
LEMON DROP MARTINI	15%	↑407%
VESPER MARTINI	3.7%	↑406%
MOCKTAILS	3.0%	↑240%
HUGO SPRITZ	7.5%	↑170%
7 & 7	1.4%	↑169%
LIMONCELLO SPRITZ	2.9%	↑165%
FRENCH MARTINI	3.8%	↑163%

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





Sales by Category in Top Gin & Tonic Accounts

For example: In top Gin & Tonic accounts, Tequila is the best-selling category, averaging 35.4 9L depletions per account in the R12 period ending December 2025. On average, top Gin & Tonic accounts sell 8% 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	 26%		35.4 32.8	+8%	-12%
WHISKEY	 25%		32.7 29.3	+11%	-8%
VODKA	 20%		28.2 23.3	↗21%	-3%
LIQUEUR	 13%		17.7 14.6	↗21%	+1%
RUM	 8.8%		13.4 12.9	+4%	-8%
GIN	 6.4%		9.7 5.2	↑87%	-4%
COGNAC	 1.0%		3.4 3.1	+9%	-4%



Sales by Price Tier in Top Gin & Tonic Accounts

For example: In top Gin & Tonic accounts, Premium is the best-selling price tier overall, averaging 43.1 9L depletions per account in the R12 period ending December 2025. That is 28% more Premium depletions than the average account nationally. Over the past two years, average Premium depletions in top Gin & Tonic accounts have declined by 8%.

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%		0.62 0.49	↗25%	+6%
PRESTIGE	 0.5%		1.5 1.1	↗34%	↘23%
ULTRA PREMIUM	 11%		16.7 13.9	↗20%	↘17%
SUPER PREMIUM	 20%		27.5 14.6	↑89%	+1%
PREMIUM	 32%		43.1 33.8	↗28%	-8%
STANDARD	 30%		41.8 44.3	-6%	-5%
VALUE	 6.4%		22.1 18.7	↗18%	—

