

CASUAL BARS MENU INSIGHTS REPORT



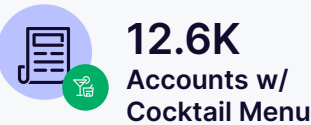
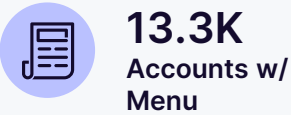
Q3 2026 YoY

GROUND SIGNAL

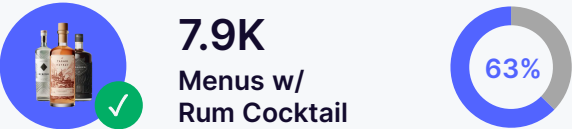
Ground Signal captures online menus at over 120,000 venues nationwide. Using sophisticated AI tools, we extract relevant information and provide it in an easy-to-analyze format.



Independent Accounts Overview



Breakdown by Spirits Category



Most Popular Classic Cocktails

COCKTAIL	MENU SHARE*
MARGARITA	50%
OLD FASHIONED	38%
MULE	30%
ESPRESSO MARTINI	29%
BLOODY MARY	27%
MARTINI	27%
MIMOSA	22%
PALOMA	17%
MANHATTAN	16%
MOJITO	16%

*Percentage of cocktail menus that feature this cocktail



TEQUILA

MENU PERFORMANCE

INDEPENDENT CASUAL BARS

Q3 2026 YoY



Ground Signal calculates menu share for each Tequila 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 Tequila cocktail.



Tequila Cocktail Menu Share

Q3 26

RANK	BRAND	SUPPLIER	MENU SHARE
1	PATRÓN	 BACARDÍ	8.0%
2	CASAMIGOS	DIAGEO	7.2%
3	ESPOLÓN	CAMPARI	6.4%
4	DON JULIO	DIAGEO	5.7%
5	JOSE CUERVO	 PROXIMO	5.0%
6	HORNITOS	SUNTORY	4.8%
7	1800	 PROXIMO	4.5%
8	MILAGRO	WILLIAM GRANT & SONS INDEPENDENT FAMILY DISTILLERS SINCE 1847	4.2%

For example: Corazón is the 9th-ranked Tequila brand on independent Casual Bars cocktail menus, appearing on 3.9% of cocktail menus that have at least one Tequila cocktail.

RANK	BRAND	SUPPLIER	MENU SHARE
9	CORAZÓN	SAZERAC	3.9%
10 ▲2	CAZADORES	 BACARDÍ	3.6%
11 ▼1	LUNAZUL	 HEAVEN HILL BRANDS	3.6%
12 ▼1	EL JIMADOR	 BROWN-FORMAN	3.4%
13	OLMECA ALTOS	 Pernod Ricard	2.7%
14 ▲1	HERRADURA	 BROWN-FORMAN	2.7%
14 ▲2	TANTEO	Tanteo®	2.7%
16 ▲1	TEREMANA	 TEREMANA SMALL BATCH TEQUILA Jägermeister	2.7%

INDEPENDENT CASUAL BARS

TRENDS AMONG TEQUILA BRANDS

CASUAL BARS MENU INSIGHTS REPORT
Q3 2026 YoY

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 26 Tequila brands with at least 1% Menu Share in Casual Bars.)



 Tequila in Casual Bars: Trending Up
Q3 2026 YoY

BRAND	SUPPLIER	MENU SHARE*	%Δ IN MENU SHARE**
LALO	 	1.8%	▲ 33%
MI CAMPO		1.9%	▲ 22%
TRES AGAVES	TRINCHERO FAMILY WINE AND SPIRITS	1.1%	▲ 20%
MAESTRO DOBEL	 PROXIMO	1.4%	▲ 17%
CODIGO 1530		1.3%	▲ 17%
CASAMIGOS	DIAGEO	7.2%	▲ 17%
GHOST	 M-S WALKER VALUE BRANDS	2.2%	▲ 8.1%
CORAZÓN	SAZERAC	3.9%	▲ 7.6%

 Tequila in Casual Bars: Trending Down
Q3 2026 YoY

BRAND	SUPPLIER	MENU SHARE*	%Δ IN MENU SHARE**
DULCE VIDA		1.4%	▼ 0.3%
MILAGRO	WILLIAM GRANT & SONS INDEPENDENT FAMILY DISTILLERS SINCE 1887	4.2%	▼ 0.6%
HORNITOS	SUNTORY	4.8%	▼ 0.9%
1800	 PROXIMO	4.5%	▼ 1.2%
LUNAZUL		3.6%	▼ 1.4%
SAUZA	SUNTORY	1.9%	▼ 1.8%
EL JIMADOR	 BROWN-FORMAN	3.4%	▼ 2.1%
PATRÓN	 BACARDÍ	8.0%	▼ 2.5%

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



Margarita is the most popular Tequila cocktail in independent Casual Bars, appearing on 65.0% of menus with at least one Tequila cocktail. Long Island Iced Tea grew the most, gaining 167.6% Menu Share.



Top Tequila Cocktails

COCKTAIL	MENU SHARE*	%Δ IN MENU SHARE**
MARGARITA	65%	▲ 2.2%
PALOMA	22%	▲ 4.1%
SPICY MARGARITA	10%	▲ 17%
RANCH WATER	5.5%	▲ 16%
MULE	4.6%	▲ 4.4%
CLASSIC MARGARITA	4.3%	▼ 6.2%
TEQUILA SUNRISE	3.7%	▼ 1.0%

Trending Tequila Cocktails

COCKTAIL	MENU SHARE*	%Δ IN MENU SHARE**
LONG ISLAND ICED TEA	3.6%	▲ 168%
ESPRESSO MARTINI	1.8%	▲ 21%
SPICY MARGARITA	10%	▲ 17%
FRUIT-FLAVORED MARGARITA	3.5%	▲ 17%
RANCH WATER	5.5%	▲ 16%
OLD FASHIONED	1.5%	▲ 15%
OAXACA OLD FASHIONED	1.1%	▲ 9.1%

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 Tequila cocktail.
**For example, a 10% would mean that cocktail's Menu Share grew by 10% (e.g., went from 10% to 11.0%), not that it gained 10 percentage points.





VODKA

MENU PERFORMANCE

INDEPENDENT CASUAL BARS

Q3 2026 YoY



Ground Signal calculates menu share for each Vodka 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 Vodka cocktail.



Vodka Cocktail Menu Share
Q3 26

RANK	BRAND	SUPPLIER	MENU SHARE
1	TITO'S		30%
2	KETEL ONE	DIAGEO	13%
3	ABSOLUT		12%
4	DEEP EDDY		11%
5	STOLI		8.2%
5 ▲2	GREY GOOSE		8.2%
7 ▼1	SMIRNOFF	DIAGEO	7.2%
8	WHEATLEY	SAZERAC	3.7%

For example: Three Olives is the 9th-ranked Vodka brand on independent Casual Bars cocktail menus, appearing on 2.8% of cocktail menus that have at least one Vodka cocktail.

RANK	BRAND	SUPPLIER	MENU SHARE
9 ▲1	THREE OLIVES		2.8%
10 ▼1	NEW AMSTERDAM	GALLO	2.6%
11 ▲3	SKYY	CAMPARI	2.0%
12	WESTERN SON	SAZERAC	1.9%
13 ▲5	STATESIDE		1.9%
13 ▼2	PINNACLE	SUNTORY	1.9%
15 ▼2	EFFEN	SUNTORY	1.6%
16 ▲1	PEARL	luxco	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 22 Vodka brands with at least 1% Menu Share in Casual Bars.)



 Vodka in Casual Bars: Trending Up
Q3 2026 YoY

BRAND	SUPPLIER	MENU SHARE*	%Δ IN MENU SHARE**
STATESIDE		1.9%	▲ 44%
SVEDKA	SAZERAC	1.3%	▲ 13%
GREY GOOSE	 BACARDÍ	8.2%	▲ 11%
SKYY	CAMPARI	2.0%	▲ 9.4%
BELVEDERE	LVMH	1.0%	▲ 7.9%
PEARL	luxco	1.6%	▲ 5.9%
WHEATLEY	SAZERAC	3.7%	▲ 5.0%
HAKU	SUNTORY	1.0%	▲ 2.0%

 Vodka in Casual Bars: Trending Down
Q3 2026 YoY

BRAND	SUPPLIER	MENU SHARE*	%Δ IN MENU SHARE**
WESTERN SON	SAZERAC	1.9%	—
ABSOLUT	 Pernod Ricard	12%	▼ 3.3%
THREE OLIVES	 PROXIMO	2.8%	▼ 3.4%
PINNACLE	SUNTORY	1.9%	▼ 7.1%
VAN GOGH	 CONECUH BRANDS	1.6%	▼ 7.9%
SMIRNOFF	DIAGEO	7.2%	▼ 9.6%
STOLI	 STOLI GROUP	8.2%	▼ 11%
NEW AMSTERDAM	GALLO	2.6%	▼ 12%

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



Espresso Martini is the most popular Vodka cocktail in independent Casual Bars, appearing on 31.9% of menus with at least one Vodka cocktail. Vesper Martini grew the most, gaining 357.4% Menu Share.



Top Vodka Cocktails

COCKTAIL	MENU SHARE*	%Δ IN MENU SHARE**
ESPRESSO MARTINI	32%	▲ 16%
BLOODY MARY	32%	▼ 0.3%
MULE	28%	▼ 1.3%
MARTINI	27%	▼ 4.2%
COSMOPOLITAN	15%	▲ 12%
LEMON DROP MARTINI	14%	▲ 5.9%
MOSCOW MULE	13%	▼ 5.3%

Trending Vodka Cocktails

COCKTAIL	MENU SHARE*	%Δ IN MENU SHARE**
VESPER MARTINI	1.4%	▲ 357%
APPLETINI	2.8%	▲ 84%
LONG ISLAND ICED TEA	9.3%	▲ 65%
TRANSFUSION	2.2%	▲ 26%
DIRTY SHIRLEY	1.0%	▲ 21%
DIRTY MARTINI	3.7%	▲ 19%
SPRITZ	4.5%	▲ 16%

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 Vodka cocktail.
**For example, a 10% would mean that cocktail's Menu Share grew by 10% (e.g., went from 10% to 11.0%), not that it gained 10 percentage points.





WHISKEY

MENU PERFORMANCE

INDEPENDENT CASUAL BARS

Q3 2026 YoY



Ground Signal calculates menu share for each 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 Whiskey cocktail.



Whiskey Cocktail Menu Share

Q3 26

RANK	BRAND	SUPPLIER	MENU SHARE
1	JAMESON	 Pernod Ricard	18%
2	BULLEIT	DIAGEO	14%
3	MAKER'S MARK	SUNTORY	10%
4	BUFFALO TRACE	SAZERAC	8.4%
5	JACK DANIEL'S	 BROWN-FORMAN	7.8%
6	CROWN ROYAL	DIAGEO	6.2%
7 	WOODFORD RESERVE	 BROWN-FORMAN	6.0%
8 	OLD FORESTER	 BROWN-FORMAN	5.3%

For example: Sazerac Rye is the 9th-ranked Whiskey brand on independent Casual Bars cocktail menus, appearing on 5.0% of cocktail menus that have at least one Whiskey cocktail.

RANK	BRAND	SUPPLIER	MENU SHARE
9 	SAZERAC RYE	SAZERAC	5.0%
10 	FOUR ROSES	 KIRIN	4.7%
11 	JIM BEAM	SUNTORY	4.7%
12 	FIREBALL	SAZERAC	4.3%
13 	ELIJAH CRAIG	 HEAVEN HILL BRANDS	3.7%
14 	SKREWBALL	 Pernod Ricard	3.6%
15 	TULLAMORE DEW	WILLIAM GRANT & SONS INDEPENDENT FAMILY DISTILLERS SINCE 1867	3.4%
15 	KNOB CREEK	SUNTORY	3.4%

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 35 Whiskey brands with at least 1% Menu Share in Casual Bars.)



 Whiskey in Casual Bars: Trending Up
Q3 2026 YoY

BRAND	SUPPLIER	MENU SHARE*	%Δ IN MENU SHARE**
MICHTER'S	 CHATHAM IMPORTS, INC.	1.5%	▲ 28%
JEFFERSON'S	 Pernod Ricard	1.3%	▲ 27%
SAZERAC RYE	SAZERAC	5.0%	▲ 21%
DEWAR'S	 BACARDÍ	1.0%	▲ 20%
WHISTLEPIG	 WHISTLEPIG	2.0%	▲ 15%
WOODFORD RESERVE	 BROWN-FORMAN	6.0%	▲ 11%
ANGEL'S ENVY	 BACARDÍ	1.9%	▲ 10%
ELIJAH CRAIG	 HEAVEN HILL BRANDS	3.7%	▲ 9.5%

 Whiskey in Casual Bars: Trending Down
Q3 2026 YoY

BRAND	SUPPLIER	MENU SHARE*	%Δ IN MENU SHARE**
BASIL HAYDEN'S	SUNTORY	2.0%	▼ 0.5%
TULLAMORE DEW	WILLIAM GRANT & SONS INDEPENDENT FAMILY DISTILLERS SINCE 1867	3.4%	▼ 2.2%
JIM BEAM	SUNTORY	4.7%	▼ 2.9%
RITTENHOUSE	 HEAVEN HILL BRANDS	2.7%	▼ 3.1%
WILD TURKEY	CAMPARI	2.0%	▼ 4.1%
TOKI	SUNTORY	1.4%	▼ 4.5%
SOUTHERN COMFORT	SAZERAC	2.1%	▼ 4.8%
JAMESON	 Pernod Ricard	18%	▼ 5.5%

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



Old Fashioned is the most popular Whiskey cocktail in independent Casual Bars, appearing on 49.2% of menus with at least one Whiskey cocktail. Smash grew the most, gaining 16.1% Menu Share.



Top Whiskey Cocktails

Cocktail	Menu Share*	%Δ in Menu Share**
Old Fashioned	49%	▲ 0.6%
Manhattan	21%	▼ 0.4%
Mule	10%	▼ 0.5%
Irish Coffee	8.8%	▲ 1.2%
Whiskey Sour	7.6%	▲ 6.0%
Smash	5.7%	▲ 16%
Martini	4.5%	▼ 4.1%

Trending Whiskey Cocktails

Cocktail	Menu Share*	%Δ in Menu Share**
Smash	5.7%	▲ 16%
Espresso Martini	2.2%	▲ 15%
Paper Plane	4.1%	▲ 14%
Whiskey Smash	1.2%	▲ 7.4%
Whiskey Sour	7.6%	▲ 6.0%
Boulevardier	3.5%	▲ 5.1%
Irish Car Bomb	1.6%	▲ 4.8%

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 Whiskey cocktail.
**For example, a 10% would mean that cocktail's Menu Share grew by 10% (e.g., went from 10% to 11.0%), not that it gained 10 percentage points.





GIN

MENU PERFORMANCE

INDEPENDENT CASUAL BARS

Q3 2026 YoY



Ground Signal calculates menu share for each Gin 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 Gin cocktail.



Gin Cocktail Menu Share
Q3 26

RANK	BRAND	SUPPLIER	MENU SHARE
1	HENDRICK'S	WILLIAM GRANT & SONS INDEPENDENT FAMILY DISTILLERS SINCE 1840	13%
2 ▲2	EMPRESS 1908		9.1%
3 ▼1	TANQUERAY	DIAGEO	8.3%
4 ▼1	BOMBAY	 BACARDÍ	7.7%
5	BEEFEATER	 Pernod Ricard	4.2%
6	FORDS GIN	 BROWN-FORMAN	4.1%
7 ▲2	AVIATION	DIAGEO	3.7%
8 ▼1	THE BOTANIST	 RÉMY COINTREAU	2.9%

For example: Roku is the 9th-ranked Gin brand on independent Casual Bars cocktail menus, appearing on 2.5% of cocktail menus that have at least one Gin cocktail.

RANK	BRAND	SUPPLIER	MENU SHARE
9 ▼1	ROKU	SUNTORY	2.5%
10	GRAY WHALE	 DEUTSCH FAMILY VINE & SPIRITS	1.8%
11 ▲1	NOLET'S	 NOLET'S FINEST GINS	1.6%
12 ▼1	BULLDOG	CAMPARI	1.5%
13 ▲3 6	STRATUSPHERE		1.3%
14 ▲1	BLUECOAT	 HEAVEN HILL BRANDS	1.2%
15 ▲1	DRUMSHANBO	 PALM BAY INTERNATIONAL	1.1%
16	MALFY	 Pernod Ricard	1.0%



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 17 Gin brands with at least 1% Menu Share in Casual Bars.)



 Gin in Casual Bars: Trending Up
Q3 2026 YoY

BRAND	SUPPLIER	MENU SHARE*	%Δ IN MENU SHARE**
AVIATION	DIAGEO	3.7%	▲ 50%
EMPRESS 1908		9.1%	▲ 24%
BLUECOAT		1.2%	▲ 16%
GRAY WHALE		1.8%	▲ 16%
DRUMSHANBO		1.1%	▲ 10%
THE BOTANIST		2.9%	▲ 9.2%
FORDS GIN		4.1%	▲ 8.4%
NOLET'S		1.6%	▲ 8.3%

 Gin in Casual Bars: Trending Down
Q3 2026 YoY

BRAND	SUPPLIER	MENU SHARE*	%Δ IN MENU SHARE**
ROKU	SUNTORY	2.5%	▼ 3.0%
MALFY		1.0%	▼ 6.5%
TANQUERAY	DIAGEO	8.3%	▼ 6.8%
CITADELLE		1.0%	▼ 15%

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



Negroni is the most popular Gin cocktail in independent Casual Bars, appearing on 15.5% of menus with at least one Gin cocktail. Vesper Martini grew the most, gaining 390.0% Menu Share.



Top Gin Cocktails

Cocktail	Menu Share*	%Δ in Menu Share**
Negroni	15%	▼ 0.7%
Martini	13%	▲ 2.5%
French 75	9.3%	▲ 4.6%
Gimlet	6.6%	▲ 3.1%
Long Island Iced Tea	6.1%	▲ 177%
Bee's Knees	6.0%	▲ 6.0%
Aviation	4.8%	▼ 30%

Trending Gin Cocktails

Cocktail	Menu Share*	%Δ in Menu Share**
Vesper Martini	2.3%	▲ 390%
Long Island Iced Tea	6.1%	▲ 177%
Dirty Martini	2.1%	▲ 38%
White Negroni	1.0%	▲ 29%
Bramble	2.9%	▲ 20%
Clover Club	1.2%	▲ 18%
Spritz	4.0%	▲ 16%

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 Gin cocktail.
**For example, a 10% would mean that cocktail's Menu Share grew by 10% (e.g., went from 10% to 11.0%), not that it gained 10 percentage points.





RUM

MENU PERFORMANCE

INDEPENDENT CASUAL BARS

Q3 2026 YoY



Ground Signal calculates menu share for each Rum 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 Rum cocktail.



Rum Cocktail Menu Share
Q3 26

RANK	BRAND	SUPPLIER	MENU SHARE
1	BACARDÍ	BACARDÍ	23%
2	MALIBU	Pernod Ricard	19%
3	CAPTAIN MORGAN	DIAGEO	12%
4	GOSLING'S	Pernod Ricard	6.4%
5 ▲1	MYERS'S	SAZERAC	4.7%
6 ▲1	PLANTERAY	MAISON FERRAND	4.7%
7 ▼2	CRUZAN	SUNTORY	4.6%
8	DON Q	SERRAVALLO'S	2.6%

For example: Appleton is the 9th-ranked Rum brand on independent Casual Bars cocktail menus, appearing on 2.1% of cocktail menus that have at least one Rum cocktail.

RANK	BRAND	SUPPLIER	MENU SHARE
9 ▲2	APPLETON	CAMPARI	2.1%
10 ▼1	THE KRAKEN	PROXIMO	2.0%
11 ▲3	PUSSER'S	SHAW-ROSS	1.9%
12 ▼2	FLOR DE CAÑA	LUXURY SPIRITS INTERNATIONAL	1.8%
13	DIPLOMÁTICO	BROWN-FORMAN	1.7%
14 ▼2	SAILOR JERRY	WILLIAM GRANT & SONS INDEPENDENT FAMILY DISTILLERS SINCE 1867	1.7%
15	PARROT BAY	SAZERAC	1.7%
16	BUMBU	SOVEREIGN BRANDS	1.5%

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 19 Rum brands with at least 1% Menu Share in Casual Bars.)



 Rum in Casual Bars: Trending Up
Q3 2026 YoY

BRAND	SUPPLIER	MENU SHARE*	%Δ IN MENU SHARE**
PLANTERAY		4.7%	▲ 35%
ZACAPA	DIAGEO	1.4%	▲ 21%
PARROT BAY	SAZERAC	1.7%	▲ 13%
PUSSER'S		1.9%	▲ 13%
APPLETON	CAMPARI	2.1%	▲ 7.0%
DIPLOMÁTICO	 BROWN-FORMAN	1.7%	▲ 1.0%
MYERS'S	SAZERAC	4.7%	▲ 0.8%
BUMBU	SOVEREIGN BRANDS	1.5%	▲ 0.7%

 Rum in Casual Bars: Trending Down
Q3 2026 YoY

BRAND	SUPPLIER	MENU SHARE*	%Δ IN MENU SHARE**
BACARDÍ	 BACARDÍ	23%	▼ 1.3%
CAPTAIN MORGAN	DIAGEO	12%	▼ 2.0%
THE KRAKEN	 PROXIMO	2.0%	▼ 2.5%
CRUZAN	SUNTORY	4.6%	▼ 3.8%
MOUNT GAY	 RÉMY COINTREAU	1.0%	▼ 5.1%
FLOR DE CAÑA	 LUXURY SPIRITS INTERNATIONAL	1.8%	▼ 5.4%
DON Q		2.6%	▼ 6.3%
SAILOR JERRY	WILLIAM GRANT & SONS INDEPENDENT FAMILY DISTILLERS SINCE 1867	1.7%	▼ 6.5%

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



Mojito is the most popular Rum cocktail in independent Casual Bars, appearing on 23.2% of menus with at least one Rum cocktail. Long Island Iced Tea grew the most, gaining 171.5% Menu Share.



Top Rum Cocktails

COCKTAIL	MENU SHARE*	%Δ IN MENU SHARE**
MOJITO	23%	▼ 4.4%
PIÑA COLADA	12%	▼ 2.9%
MAI TAI	11%	▲ 2.4%
DAIQUIRI	8.4%	▼ 29%
RUM PUNCH	6.7%	▲ 9.9%
MARTINI	5.6%	▼ 6.8%
DARK & STORMY	5.6%	▼ 6.9%

Trending Rum Cocktails

COCKTAIL	MENU SHARE*	%Δ IN MENU SHARE**
LONG ISLAND ICED TEA	5.4%	▲ 171%
COLADA	3.8%	▲ 25%
ESPRESSO MARTINI	1.5%	▲ 16%
SMASH	1.1%	▲ 13%
ZOMBIE	2.0%	▲ 10.0%
RUM PUNCH	6.7%	▲ 9.9%
FROZEN DAIQUIRI	1.2%	▲ 8.3%

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 Rum cocktail.
**For example, a 10% would mean that cocktail's Menu Share grew by 10% (e.g., went from 10% to 11.0%), not that it gained 10 percentage points.





TOTAL CORDIALS

MENU PERFORMANCE

INDEPENDENT CASUAL BARS

Q3 2026 YoY



Ground Signal calculates menu share for each Total Cordials 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 Total Cordials cocktail.



Total Cordials Cocktail Menu Share
Q3 26

RANK	BRAND	SUPPLIER	MENU SHARE
1	APEROL	CAMPARI	33%
2	KAHLUA	 Pernod Ricard	20%
3	ST. GERMAIN	 BACARDÍ	18%
4 ▲2	CAMPARI	CAMPARI	17%
5	COINTREAU	 RÉMY COINTREAU	17%
6 ▼2	BAILEYS	DIAGEO	16%
7	GRAND MARNIER	CAMPARI	13%
8 ▲1	CHAMBORD	 BROWN-FORMAN	7.7%

For example: De Kuyper is the 9th-ranked Total Cordials brand on independent Casual Bars cocktail menus, appearing on 7.3% of cocktail menus that have at least one Total Cordials cocktail.

RANK	BRAND	SUPPLIER	MENU SHARE
9 ▼1	DE KUYPER	SUNTORY	7.3%
10 ▲1	MR BLACK	DIAGEO	7.1%
11 ▼1	LUXARDO	 HOTALING & CO. IMPORTER-DISTILLER	6.7%
12	RUM CHATA	GALLO	6.1%
13 ▲2	CHARTREUSE	 IMPORTER FREDERICK WILDMAN AND SONS, LTD. WINE & SPIRITS	6.0%
14 ▼1	FRANGELICO	CAMPARI	5.9%
15 ▲2	LICOR 43	 Zamora company	5.7%
16 ▼2	LILLET	 Pernod Ricard	5.6%

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 46 Total Cordials brands with at least 1% Menu Share in Casual Bars.)



 Total Cordials in Casual Bars: Trending Up
Q3 2026 YoY

BRAND	SUPPLIER	MENU SHARE*	%Δ IN MENU SHARE**
NONINO	 TERLATO ALWAYS EXCEPTIONAL	4.3%	▲ 27%
PIMMS	 DIAGEO	3.4%	▲ 17%
LICOR 43	 Zamora company	5.7%	▲ 16%
BORGHETTI	 BRANCA	3.6%	▲ 14%
CHAREAU	 chateau	1.3%	▲ 13%
PATRÓN	 BACARDÍ	1.4%	▲ 11%
MONTENEGRO	 GALLO	4.9%	▲ 8.5%
AVERNA	 CAMPARI	4.4%	▲ 8.5%

 Total Cordials in Casual Bars: Trending Down
Q3 2026 YoY

BRAND	SUPPLIER	MENU SHARE*	%Δ IN MENU SHARE**
KAHLUA	 Pernod Ricard	20%	—
MIDORI	 SUNTORY	4.1%	▼ 0.1%
DISARONNO	 ILLVA SARONNO	2.7%	▼ 1.9%
JAGERMEISTER	 Jägermeister	4.0%	▼ 2.1%
LILLET	 Pernod Ricard	5.6%	▼ 2.2%
GIFFARD	 BACK BAY PROJECT	3.9%	▼ 2.2%
SUZE	 Pernod Ricard	1.4%	▼ 2.3%
BAILEYS	 DIAGEO	16%	▼ 2.7%

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



Margarita is the most popular Total Cordials cocktail in independent Casual Bars, appearing on 37.1% of menus with at least one Total Cordials cocktail. Long Island Iced Tea grew the most, gaining 153.9% Menu Share.



Top Total Cordials Cocktails

Cocktail	Menu Share*	%Δ in Menu Share**
Margarita	37%	▲ 4.0%
Espresso Martini	28%	▲ 15%
Martini	20%	▼ 7.4%
Aperitif Spritz	15%	▲ 5.5%
Cosmopolitan	12%	▲ 12%
Spritz	11%	▲ 20%
Negroni	9.2%	▼ 1.7%

Trending Total Cordials Cocktails

Cocktail	Menu Share*	%Δ in Menu Share**
Long Island Iced Tea	4.6%	▲ 154%
Appletini	2.0%	▲ 82%
Hugo Spritz	5.3%	▲ 68%
Fruit-Flavored Margarita	2.0%	▲ 41%
Limoncello Spritz	2.0%	▲ 40%
Carajillo	1.8%	▲ 26%
Paper Plane	4.0%	▲ 21%

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 Total Cordials cocktail.
**For example, a 10% would mean that cocktail's Menu Share grew by 10% (e.g., went from 10% 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:

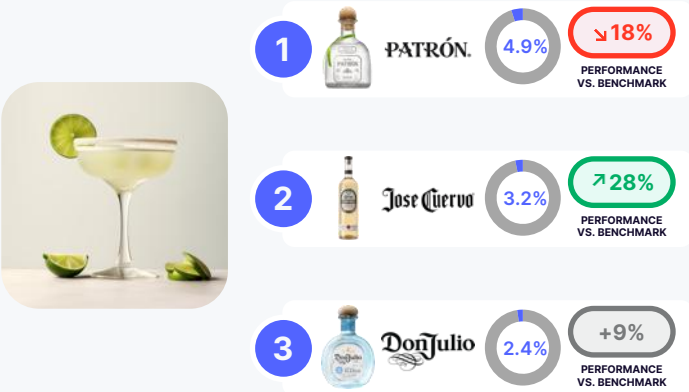
Venue Profile

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