

MODERN FINE DINING INSIGHTS

NATIONAL





Cocktail Mentions

Top Cocktails



For example: Consumers are 91% more likely to mention Martini when posting about Modern Fine Dining than in their overall on-premise posts.

Cocktail	Volume	Index vs. Total On-Premise*
MARTINI		↑91%
ESPRESSO MARTINI		↑67%
SPRITZ		↑61%
MARGARITA		↓65%
MOCKTAILS		↗31%
MIMOSA		↘45%
DIRTY MARTINI		↑188%

*Index compared to share of occasion mentions nationally

Trending Cocktails



For example: The Last Word share of Modern Fine Dining cocktail mentions increased by 52% nationally over the past two years.

Cocktail	Index vs. Total On-Premise*	2-Year Growth**
THE LAST WORD	↑316%	▲52%
GIN JUICE	↗24%	▲40%
WINE SPRITZ	↑55%	▲34%
DIRTY MARTINI	↑188%	▲21%
VESPER MARTINI	↑265%	▲16%
MOCKTAILS	↗31%	▲13%
SPRITZ	↑61%	▲12%

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

Occasion Mentions

Top Occasions



For example: Consumers are 140% more likely to mention Dinner when posting about Modern Fine Dining than in their overall on-premise posts.

Occasion	Volume	Index vs. Total On-Premise*
DINNER		↑140%
BIRTHDAY		↑79%
FRIENDS		↘22%
BRUNCH		↗31%
DATE NIGHT		↑128%
ANNIVERSARY		↑87%
PARTY		↓57%

*Index compared to share of occasion mentions nationally

Trending Occasions



For example: Galentine's Day share of Modern Fine Dining occasion mentions increased by 23% nationally over the past two years.

Occasion	Index vs. Total On-Premise*	2-Year Growth**
GALENTINE'S DAY	↗34%	▲23%
HAPPY HOUR	+1%	▲14%
MOTHERS DAY	↗35%	▲3.3%
FATHERS DAY	+10%	▲2.8%
ANNIVERSARY	↑87%	▲2.6%
BRUNCH	↗31%	▲1.9%
DINNER	↑140%	▲1.8%

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





Cocktail Categories



For example: 88% of top Modern Fine Dining accounts nationally feature a Vodka cocktail; that category's menu share of Modern Fine Dining has grown 0% year-over-year. Mezcal is the fastest-growing, with 2% growth since the prior year.

Category	Menu Share	Growth
VODKA	88%	—
WHISKEY	86%	—
GIN	80%	-2%
AMERICAN WHISKEY	80%	+2%
TEQUILA	79%	—
RUM	66%	-1%
MEZCAL	48%	+2%

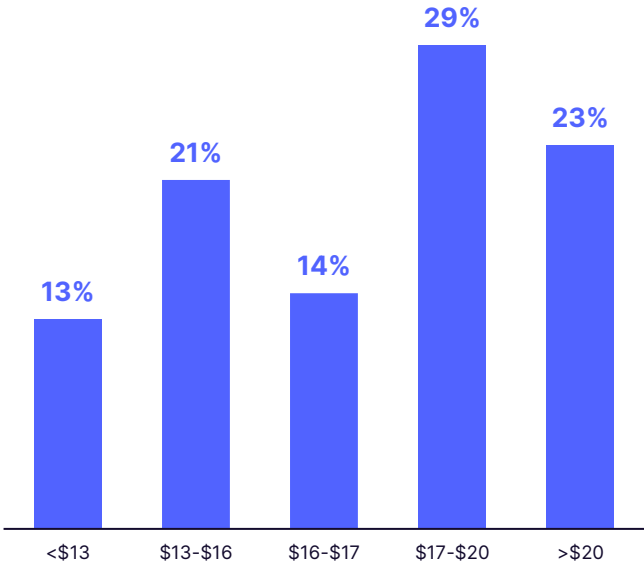
*Change in share of menu placements from Dec 2024 to Dec 2025

Cocktail Price Insights



\$16.53

Average cocktail price in Modern Fine Dining



Modern Fine Dining Flavors

Top Modern Fine Dining Flavors



Lemon is the most common flavor in top Modern Fine Dining accounts, appearing on 81% of menus in December 2025.

Flavor	Menu Share	YoY Growth*
LEMON	81%	-1%
LIME	80%	-1%
ORANGE	71%	-1%
COFFEE	61%	+6%
GINGER	54%	—
PINEAPPLE	51%	—
ELDERFLOWER	47%	+4%

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

Growing Modern Fine Dining Flavors



Tropical is the fastest-growing flavor in top Modern Fine Dining accounts, with 24% growth since the prior year.

Flavor	Menu Share	YoY Growth*
TROPICAL	9.4%	↗24%
TANGERINE	3.3%	↗22%
GRAPE	4.9%	↗18%
LYCHEE	19%	↗17%
PLUM	6.0%	+13%
YUZU	18%	+12%
BANANA	14%	+12%

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





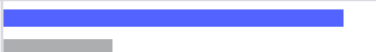
Sales by Category in Top Modern Fine Dining Accounts

For example: In top Modern Fine Dining accounts, Whiskey is the best-selling category, averaging 40.3 9L depletions per account in the R12 period ending December 2025. On average, top Modern Fine Dining accounts sell 37% more Whiskey 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		
WHISKEY	 27%		40.3 29.3	↗37%	-4%
VODKA	 26%		40.0 23.3	↑72%	+4%
TEQUILA	 22%		33.3 32.8	+2%	-14%
LIQUEUR	 12%		18.1 14.6	↗24%	-1%
GIN	 6.9%		11.1 5.2	↑114%	+2%
RUM	 4.6%		8.0 12.9	↘38%	-8%
COGNAC	 1.5%		3.6 3.1	↗16%	-6%

Sales by Price Tier in Top Modern Fine Dining Accounts

For example: In top Modern Fine Dining accounts, Premium is the best-selling price tier overall, averaging 50.5 9L depletions per account in the R12 period ending December 2025. That is 49% more Premium depletions than the average account nationally. Over the past two years, average Premium depletions in top Modern Fine Dining accounts have declined by 7%.

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	 0.2%		0.55 0.49	+11%	+3%
PRESTIGE	 0.9%		1.7 1.1	↑56%	-9%
ULTRA PREMIUM	 13%		21.0 13.9	↑51%	↘16%
SUPER PREMIUM	 30%		45.6 14.6	↑213%	+3%
PREMIUM	 32%		50.5 33.8	↗49%	-7%
STANDARD	 21%		34.3 44.3	↘23%	-4%
VALUE	 2.8%		13.8 18.7	↘26%	+10%

