



2026

BACARDI

Cocktail

TRENDS REPORT



PRESENTED BY BACARDI LIMITED
IN ASSOCIATION WITH THE FUTURE LABORATORY

CONTENTS

Page

PAGE 3
INTRODUCTION

PAGE 4
MACRO TREND ONE:
Afternoon Society
NEW RHYTHMS, NEW ROUTINES
SNACKABLE SIPS
RITUAL REFRESHMENTS

PAGE 9
MACRO TREND TWO:
Revilding Connection
COMMUNITY CRAVINGS
PEOPLE-FIRST PLACEMAKING
ICE-BREAKER SERVES

PAGE 14
MACRO TREND THREE:
New Locality
PROVENANCE PROTOCOLS
LIVING LABORATORIES
INGREDIENTS WORK HARDER

PAGE 19
MACRO TREND FOUR:
The Liquid Experience IP
PREMIUM INFLUENCE
LIVING COCKTAILS
THE MENU AS MEDIUM

PAGE 23
MACRO TREND FIVE:
More is More Mixology
A TASTE OF EXCESS
EXPERIENTIAL OPULENCE
FANTASTICAL FLAVORS

PAGE 27
CONCLUSION



INTRODUCTION

In 2026, cocktail culture refuses to stay behind the bar. Once bound by venues and occasions, it is now being mixed, remixed, and reimagined – spilling into new spaces, formats, and even moments in time.

Emerging generations, with their instinct for curating experiences on their own terms, are driving this evolution. Brands are responding by rewriting the rules of when and where cocktails are enjoyed, shifting the emphasis toward the questions of *what* is being sipped and with *whom*.

As consumers renegotiate their spending in a complex economic climate, cocktails remain a resilient site of expression, connection, and creativity. At the heart of this change are Gen Zers of legal drinking age (LDA), a cohort entering new phases of financial independence and bringing with them new values, and a growing confidence in how they direct their spending power. Their expectations are different: community, flexibility, and playful luxury sit at the core of their choices, inspiring innovation beyond their cohort.

Shunning the “sober generation” label, Gen Zers’ coming-of-age social rituals are finding their rhythm – with cocktail culture firmly on the agenda. Bacardi research shows their spend now matches the average across cohorts, but it’s their new values and behaviors that are reshaping how they choose to drink, not limiting it.

The result is a category poised for expansion, as consumers look for cocktails that offer more than flavor and instead serve up complete experiences. Whether it’s enriched connections, unexpected moments to celebrate, or new cultures to enjoy: the focus is on delivering value beyond flavor alone.

Forget downturns – the real story for cocktails and premium spirits is centered on diversification. From markets to moments, consumers are reimagining their connection with cocktail culture and drinks brands entirely.



“Brands are delving beyond traditional frontiers to capture consumers' attention and their spend. True value for today's consumers means appearing across the many touchpoints and occasions they inhabit, delivering experiences that mirror and mold their tastes, values, and interests beyond the sector.”
Martin Raymond, The Future Laboratory, Co-Founder

As we look to the future, this shift means that cocktails are no longer linked to any one particular time or place, but rather a portfolio of possibilities, adapting fluidly to meet consumers moods, values, and lifestyles.

In this report, Bacardi Limited, the world’s largest privately held international spirits company, unpacks the key trends set to shape a new era for cocktail culture and the spirits

business in 2026. This report – the seventh annual edition – created in collaboration with strategic foresight consultancy The Future Laboratory, draws on insights from Bacardi-led consumer and brand ambassador surveys, interviews with the bar and restaurant trade, and The Future Laboratory’s independent research.



MACRO TREND ONE:

AFTERNOON

Society

As hybrid routines settle and office rhythms return, a new drinking ritual is rising to meet the moment: the daycap. Swapping the traditional nightcap for a late afternoon treat, today's consumers – especially Gen Z – are embracing lighter, earlier indulgences that align with their evolving lifestyles. Think Thursday happy hours, slow-paced afternoon parties, and drinks that complement – not derail – the rest of the day.

Rather than drinking less, LDA Gen Z is simply drinking differently, paving the way for smaller, sweeter, and mood-driven pleasures – from

low-ABV spritzes to dessert-inspired cocktails – forming part of the new era's burgeoning "sweet treat economy."

As circadian rhythms recalibrate, the daycap looks set to keep pace with the nightcap, championing balance, micro-celebration, and a fresh sense of what feels "earned."



"For this new cohort, indulgence doesn't mean excess – it means intention." Sean Kerry, Vice President for Global On-Trade, Bacardi



NEW RHYTHMS, *New Routines*

Forget the “sober generation” label – Gen Zers are still enjoying cocktail serves, just on their terms. While their alcohol spend matches other age groups, their habits reflect a cultural shift: earlier evenings, mindful indulgence, and casual imbibing. With cocktail moments starting sooner, brands and service models are evolving to match, making the most of post-work happy hours and a “Thursday is the new Friday” mindset.

Across regions, people are heading out to drink, eat, and socialize earlier in the evenings, noted by 40% in Spain and India, 32% in Italy and Australia, and 30% in France, according to the Bacardi Global Consumer Survey (GCS).

Notably, younger consumers are leading the charge, with over half of those in France (51%) and more than one third in the U.S. (34%) reshaping routines around earlier evenings.

Beyond the hard-to-book locations, it's now the hard-to-book timeslots consumers are vying for –

with post-work bookings coming out on top. In the UK, the average dinner reservation now sits at 6:12 p.m., with just 2% bookings made for after 9 p.m.¹

This shift signals the arrival of the daycap – the afternoon and earlier evening answer to cocktail indulgence. It's a preference set to gain traction for 2026, where around one-third of consumers in Germany, Spain, Canada, and the UK are set to opt for the serve. The Netherlands is more enthusiastic still, where nearly half of Gen Z are more likely to opt for the daycap over the traditional nightcap.

Brands and venues are jumping on board – matching the mood with offerings that speak to earlier occasions. ANGEL'S ENVY® daycap offers a playful twist on a classic, combining whiskey, peach syrup, and sparkling lemonade. Meanwhile, Michelin®-star restaurant Portland in London has a dedicated menu for the afternoon society – spotlighting a four-course set menu between 5:30 p.m. and 6:30 p.m. Originally a celebration of the venue's 10-year anniversary, it's now a firm feature thanks to its popularity.

And it's not just indoors. Rooftop spots like Atnea Sky in Valencia are curating cocktail menus designed for golden hour sipping and tastebuds. The venue's A Tea in Tuscany cocktail combines MARTINI® Fiero, MARTINI® Riserva Speciale Rubino, BOMBAY SAPPHIRE®, bitter orange and black tea.

The rise of *al fresco* terraces in city hotspots is anchoring these new rituals and social rhythms: 3 p.m. coffees that lingers into *apéritif* or *tardeo* hour, post-work terrace gatherings replacing traditional dinners, or weekday *al fresco* lunches that feel like mini-escapes. In France – *ginguettes* – waterside terraces, which can be either pop-up or permanent – are more popular than ever in Paris and are a growing feature of urban life across the country – aligning with schemes in Barcelona, Berlin, London, and Vienna.

SNACKABLE *Sips*

Today's drinkers are trading volume for vibe, embracing small-format cocktails that deliver flavor, ritual, and reward – in a treat-sized serving. From mini Martinis and low-ABV sippers to dessert-and-drink pairings, bars are tapping into a culture of measured pleasure.



Think of it as cocktail culture's answer to the sweet treat: refined, intentional, with just the right hint of indulgence. Whether served icy-cold in two stages or paired with a candy-sized accompaniment, these miniature moments are elevating the everyday.

The Martini cocktail, once known for its high ABV, is being reimagined in miniature form – a serve that stays ice-cold, while delivering the same signature flavor profile and timeless appeal of its full-sized counterpart. The format taps into shifting habits, with 43% of younger Spanish consumers planning to drink more neat spirits and cocktails in the next 12 months, according to the Bacardi GCS.

Bars have been quick to adapt. In the UK, Manchester's Binker Bar offers a Smaller Serves menu featuring mini Margaritas, Martinis and its signature Snaquiri cocktail, made simply with BACARDÍ® Carta Blanca, citrus blend and sugar. Elsewhere, Boston's Birds of Paradise serves up a monthly mini Martini menu in collaboration with guest bars around the city. These monthly moments allow the team to share creative and exciting flavor

combinations like BOMBAY SAPPHIRE® Premier Cru gin with nitro-infused shiso leaf, NOILLY PRAT® and orange bitters, or PATRÓN® Silver, tomato aquavit, ST-GERMAIN®, and basil *eau-de-vie*.

Beyond snackable variety, the trend for mini Martinis and serves is allowing venues to combat consumers' number one cocktail ick: not cold enough. Highlighted by 54% of consumers in Mexico, 50% in Spain, 49% in France, 44% in Germany, 40% in the Netherlands, 38% in Canada, and 26% in Australia (Bacardi GCS).

Function meets flavor, with consumers increasingly opting for a palette that mirrors the late afternoon pick-me-up: the sweet treat. Globally, fruity and sweet flavors reign supreme as *the* cocktail flavor of choice. Fruity is ranked number one by 63% of respondents in India, 60% in Germany and 59% in the UK, while sweet comes out on top in Mexico (58%) and the U.S. (52%), according to the Bacardi GCS.

This preference is signaling the resurgence of dessert-inspired serves like the Piña Colada, named the number three top global bar call for 2026 (Bacardi GCS).

Bars like Rubí in Mexico City are leaning into the trend with sweet, playful twists like a tequila-laced ST-GERMAIN® Spritz, finished with grapefruit and lychee soda for extra sweetness. In Paris, Remy Savage's Bar Nouveau goes one step further, serving the Nouveau Ramos with GREY GOOSE® vodka, vanilla yogurt, peat, ST-GERMAIN® elderflower liqueur, and soda water.

Together, mini formats and sweet profiles are pointing to a cocktail culture that's colder, lighter, more playful – and built for new rhythms of consumption.



TOP BARTENDER *Flavor Picks*

BACARDI GLOBAL BRAND AMBASSADOR SURVEY



FRUITY
55%



SWEET
46%



SAVORY
26%



SPICY
24%



Ritual REFRESHMENTS

Consumers are bringing their daytime tastes into the evening, favoring mixers and cocktails that mirror their lifestyle preferences. From kombucha and matcha-infused drinks to apothecary-inspired bars focused on intentional rituals, the boundary between daytime refreshments and nighttime indulgence is fading.

This trend fuels innovation in low-ABV aperitifs that offer unique flavors and thoughtful experiences, catering to a generation seeking drinks that reflect their values *and* moods.

Moderation now means mixing and matching. More than a quarter of Germans, and roughly one in five younger drinkers in Canada, India and the Netherlands, switch between alcoholic and non-alcoholic cocktails in the same session (Bacardi GCS). This fluid approach reflects Gen Zers' broader rhythms: flexible, earlier, and built around drinks that keep pace with changing moods and moments.

Rather than retreating from bars and venues however, they're showing up more, reflecting the desire to redesign cocktail culture in line with their own lifestyle preferences. Almost three-quarters (72%) visit weekly, and 38% say they'll go out even more often in the months ahead.²

Bars are adapting with cocktails designed for earlier hours and lighter occasions. At Rosewood Amsterdam's Advocaat Bar, drinks like the Uprising – PATRÓN® Silver tequila with smoked cherry, cocoa, clarified milk and ginger beer – balance complexity with drinkability. Its Lady of Justice blends GREY GOOSE® vodka with rhubarb liqueur, fortified mango and lychee, creating a cocktail that sits comfortably in the late afternoon as much as after dark.

Across Europe, the shift is structural. In Spain and the UK, drinkers are trading high-intensity nightlife for a different tempo with gatherings built around longer, lighter drinks, with the Spritz continuing to boom. That change has driven an +8% CAGR in aperitif sales between 2018–2023, with further growth expected through 2028.³ In Germany, the Netherlands and Canada, nearly half of Gen Z opt for Spritzes at lunchtime, while in Italy, 49% of consumers plan to embrace sundowner drinking more often in 2026 (Bacardi GCS).

MACRO TREND TWO:

REWILDING *Connection*

As consumers reassess their relationship with the digital world, a new wave of mindful, in-person socializing is emerging. Rewilding Connection champions experiences that decenter screens in favor of intentional, analog moments rooted in community, creativity, and shared joy.

This is not about rejecting technology entirely – but rather about rebalancing it through in-real-life (IRL) gatherings that feel genuine, grounded, and nourishing. Here, the cocktail becomes a companion to connection, not the main event.



COMMUNITY *Cravings*

For next-gen drinkers, community isn't built in crowded clubs or comment sections – it's cultivated through intentional, shared experiences. From pop-up dinners and sober-curious socials to creative workshops and analog leisure, these cohorts are seeking new, more meaningful ways to come together.

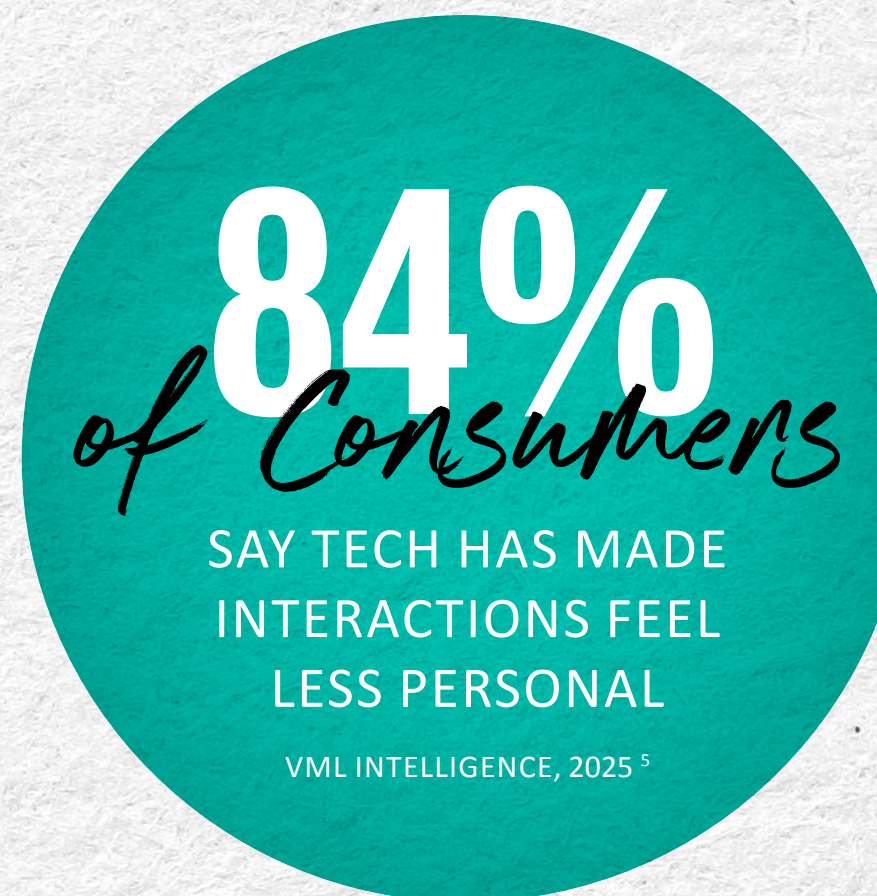


“

"It's less about being seen, more about feeling seen – and co-creating spaces that foster presence, purpose, and real connection." Rigoberto Chavez, VP Global Insights, Bacardi

The focus is shifting toward intentional gatherings, where presence and connection matter most. Some 85% of consumers say they wish they had more time to spend with the people they care about, with brands and spaces that can create these moments stepping into a new role as facilitators of belonging.⁴

While the traditional club scene continues to contract, fresh formats are filling the gap. Operators are also responding tactically, reinventing slower nights with programs designed to keep people coming back. In Toronto, Bar Mordecai layers in tarot readings, charity bingo, and karaoke alongside its cocktails, creating what owner Christina Veira calls “casual benevolence” – a social model that raises money for local causes while offering space for joy and connection.



This shift is reflected globally. Gen Z is prioritizing music and cultural festivals over traditional club nights, with nearly half in Spain (49%) and around 40% in the UK and Australia saying they plan to attend more festivals in 2026 than they did in 2025 (Bacardi GCS). And when they gather, cocktails are the soundtrack of choice: more than half (58%) of UK consumers say cocktails are their number one pick for connecting with friends.

Bars and restaurant venues are being reimagined as vital hubs for community, with more than a quarter of respondents expecting them to evolve further into intentional community centers, according to the Bacardi Global Brand Ambassador

Survey (GBAS). Holzmarkt 25 in Berlin embodies this evolution, transforming a former brownfield site into a user-driven urban village, where creativity, culture, and cocktails merge into a living community experiment.

Meanwhile in London, members' clubs are cultivating a deeper sense of togetherness through curated surprises that reward those in the room. Soho House's Secret Soho Sounds, in partnership with PATRÓN® tequila, stages live performances that are revealed only as the artist takes the stage. The effect is one of collective discovery – a moment shared only by those present – blurring the lines between nightlife, music festival, and private members' club, while reinforcing the value of being part of the in-the-know community.

The trend is clear: nightlife is no longer about anonymous crowds and fleeting encounters. It is being reshaped into community-driven experiences that give drinkers not just somewhere to go, but something to belong to.

PEOPLE-FIRST *Placemaking*

Across salons, libraries, coffee shops and galleries, a new generation is reclaiming everyday spaces for community, culture, and connection. From reading parties and book raves to block parties, Gen Z consumers are reshaping social life around intentional, joy-fueled gatherings. It's not just about where you go – but how you feel when you get there.

For next-gen drinkers, the “third place” – a community space between work and home – is no longer optional, it's essential. Nearly half of LDA Gen Z (49%) drinkers already use third places such as cafés or community hubs at least weekly, 29% more than Gen Xers.⁶

Next-gen drinkers are redesigning their social calendars around these alternative hubs, seeking community and cocktail culture away from traditional venues in favor of spaces rooted in intention and fulfillment.

This growing preference is reshaping the economics of on-premise venues, where figures show that third places now generate 19% more drinks volumes per month than traditional hospitality outlets, making them vital channels for engagement.⁷

Coffee clubbing is one example, bringing together café culture with live music and community. Eventbrite reports that attendance to these events was up by 150% in 2025, with Houston alone experiencing a staggering 1,800% surge.⁸ From Corridor Seven's coffee raves in Nagpur, India to New York's Reading Rhythms parties, where young people gather to read together to curated soundtracks, the gathering blends analog leisure with cultural experimentation. Drinks brands are getting in on the action too. Café Con Ron is a traveling daytime series, featuring BACARDÍ® Reserva Ocho, SANTA TERESA 1796®, and more. The event transforms Texas coffee shops and patios into high-tempo cultural hubs, showing how brands can meaningfully meet culture where it lives.

Elsewhere, analog hobbies and game nights are becoming the new social glue, drawing younger adult crowds into traditional venues worldwide. In San Francisco, mahjong nights are packing venues, while across the U.S., Canada, and Germany, board games, trivia, and cards are fast replacing dance floors as a way to connect, with almost half (47%) of Canadian Gen Z and 39% of consumers in Germany noting game nights are a key draw to the venue (Bacardi GCS).





ICE-BREAKER *Serves*

As socializing becomes more intentional, drinks are evolving into tools for connection. From omakase-style flavor journeys to shareable ready-to-drink (RTD) offers, these serves are designed to spark conversation and convenience, while turning tasting into togetherness. It's a shift from statement drinks to social rituals – served one sip at a time.



Bars are experimenting with formats that turn the drink into part of a broader cultural exchange. Miami's Bar Kaiju links each cocktail to illustrated trading cards inspired by Japanese "strange beasts," creating narrative-driven rituals that double as conversation starters.

At The Studio space inside New York's Clemente Bar, intimacy takes center stage – fostering deeper connection not only among guests themselves, but between guests, bartenders, and chefs. Its nine-seat tasting counter blurs the line between bar and kitchen, offering visitors a 90-minute journey

of five plant-based courses paired with innovative cocktails. Prepared and served live before guests, each dish and drink becomes part of a shared performance – a close-up celebration of collaboration, creativity, and connection.

The portability of RTDs makes them the perfect partner for community-first leisure – from house parties to festivals. The launch of the BACARDÍ® & Coca-Cola® RTD in 2025 positioned the serve as ready for any adventure, tapping into the desire for unfussy drinks that fit seamlessly into everyday experiences. In the UK, younger LDA adults plan to drink more RTDs or canned cocktails across the next 12

months, with around two fifths of 18-29 year olds (39%) and 37% of 30-44-year olds planning to do so (Bacardi GCS).

Elsewhere, the revival of the iconic BREEZER® in the UK shows how nostalgia and experience design is combining to create drink-led cultural moments for connection. With BREEZER in hand, step through a retro video store in London's Covent Garden and into Bunga 90, an interactive 90s bar with cocktails, pizza and karaoke. In Manchester's Northern Quarter came modeled after a corner shop stacked with the essentials: numerous shelves of the colorful RTD bottles, plus a late-night DJ set.





Top Global Bar CALLS 2026



- | | | | |
|------------------|-------------------------|--------------------|--------------------------|
| 1 MARGARITA | 6 SPRITZ | 11 IRISH COFFEE | 16 TEQUILA SODA |
| 2 MOJITO | 7 VODKA LEMONADE | 12 BLOODY MARY | 17 GIN LEMONADE |
| 3 PIÑA COLADA | 8 VODKA SODA | 13 TEQUILA SUNRISE | 18 SCREWDRIVER |
| 4 RUM & COKE® | 9 GIN & TONIC | 14 DAIQUIRI | 19 PALOMA |
| 5 WHISKY & COKE® | 10 DRY MARTINI COCKTAIL | 15 MIMOSA | 20 PASSION FRUIT MARTINI |

BACARDI GLOBAL CONSUMER SURVEY

MACRO TREND THREE:

NEW

Localogy

As changing trade conditions and transparency reshape the industry, bars are evolving into laboratories of local flavor – harnessing micro-farms, regional ecologies, and scientific experimentation to pioneer a new future of mixology. This movement is not about replacing internationally celebrated spirits, but about elevating them through locally sourced ingredients, garnishes, and flavor accents that root each serve in its environment.

This New Localogy movement is breeding cocktail iterations that are innovative, place-driven, and deeply rooted in community, signaling an all-new understanding of provenance. Here, every sip becomes a curated expression of terroir, technique, and transparency – catering to new consumer preferences to savor not only the flavor, but the place and process behind it.



Provenance PROTOCOLS

Shifting regulations and rising consumer demand are driving bars to adopt new standards around transparency and sourcing for garnishes, syrups, and more.

From innovative techniques to supplementing in-demand ingredients, venues are rethinking the cocktail's journey. Upcoming rules mandating QR-coded lifecycle data will cement provenance storytelling as a core part of the cocktail experience, building deeper trust through full transparency.

Provenance has evolved beyond trend status, solidifying into protocol as transparency becomes a shared demand of consumers and regulators alike. Today, more than 8 in 10 U.S. consumers read labels before deciding to buy a product, with almost two-thirds (63%) paying more attention to label information compared to five years ago. Among the information, region of origin is key for over three quarters (77%) of consumers.⁹

Brands have begun utilizing digital shortcuts to make vital product information accessible. Bacardi is adding QR codes to its labels which, in the EU, provide consumers with nutritional and ingredient information, as well as recycling instructions for some markets.

Notably, this transparency isn't just about compliance – it's becoming part of the experience, leading bars and brands to experiment with

ingredients and storytelling to embed provenance stories into the consumer journey.

Brands are also responding creatively to new sourcing and transparency challenges. The PATRÓN® “Censored Truth” campaign showcases the brand's commitment to transparency and purity in tequila production pulling back the curtain on what's really in your tequila. The campaign emphasizes that PATRÓN® has no secret ingredients – and has always been made with just three ingredients: 100% Weber Blue Agave, water, and yeast.

In Toyko, past global winner of the BACARDÍ® Legacy Cocktail Competition Shingo Gokan has opened a new cocktail bar above famed The SG Club. The Sangai Bar has only eight counter seats, delivering an intimate and engaging drinking experience that sets it apart from SG's other bars. Built around the concept of “Terroir x Terrior” – referring to the union of two places – the bar offers multi-beverage cocktail experiences highlighting Japanese spirits, seasonal fruit, and unique ingredients sourced from around the world.

At Mexico's Handshake Speakeasy – ranked second among The World's 50 Best Bars for 2025 – Co-Founder Eric van Beek uses citric acid to recreate the brightness of lime without the citrus fruit. Its twist on the Paloma is made with strawberry-infused mezcal, habanero tincture, and yellow bell pepper soda that merges fresh, fruity, veggie and spicy flavors.

Experimental projects like Zack Denfeld's “Mock Wild” further hint at the future, where AI harmonizes agroforestry and conventional farming systems to produce hybrid, biodiverse supply chains.



LIVING *Laboratories*

Bars and restaurants are transforming into self-sustaining innovation hubs, blending science, gastronomy, and local ecology into complete cocktail experiences.

From vertical hydroponic farms to indigenous ingredient-based cocktails, living laboratories connect growing, crafting, and consuming in real time. These new drinks ecosystems



champion seasonality and experimental mixology – all within house-made, circular systems.

Promisingly, locality is top of mind for both consumers and the industry. “Buying Local” is the number one environmental and sustainability theme across regions – chosen by almost half consumers in Australia (45%) and Canada (44%) (Bacardi GCS). Supporting local businesses is key to the on-trade too, ranked globally as the number one priority for hospitality venues across the next 12 months (Bacardi GBAS).

Brands and bars are harnessing this drive by moving beyond sustainable checkboxes, creating a new form of hospitality rooted in ecology and experimentation – delivering big on transparency, and even bigger on taste.

At Alquímico in Cartagena, ranked number 11 among The World’s 50 Best Bars, the bar features a three-floor journey through Colombian terroir. Guests begin with regional ingredients, move through classics reimagined with native fruits and herbs, and end on a rooftop #FromTheFarmToTheBar experience powered by the venue’s own agricultural project.



Similarly in Dublin, the TEELING® Irish whiskey Bang Bang Bar incorporates honey from its rooftop beehives (home to more than 500,000 native Irish bees), alongside herbs from its on-site garnish garden to offer serves such as the New (Market) Old Fashioned, a blend of TEELING® Small Batch, House Made Allspice Liqueur, TEELING® Rooftop Honey, and bitters.

Elsewhere, experimentation takes a scientific turn. Panda & Sons in Edinburgh has redefined sub-zero mixology through cryo-concentration, freeze-drying, and sous-pressure –

pioneering its on-site lab concept, “The Brain Melting Society” to expand the reach of its ingredient experimentation. Its Coconut Daiquiri, clarified with roasted Thai coconut milk and paired with a white chocolate wafer, blurs the line between science and comfort.

With community a key draw for next-gen drinkers, innovators are working to embed global spirits with a sense of place. By fusing world-class spirits with hyperlocal flavors, bars are creating drinks that don’t just taste good, but tell the story of where you are, and who you’re with.

At Elysian bar in Budapest, fruits, herbs and spices are sourced within a 60km radius from local producers, meaning that its classic Margarita is reimagined with a blend of PATRÓN® Silver tequila, dry curaçao and verjus – an alternative to lemons and limes made from fermented sour-fruit found in the region.



Ingredients **WORK HARDER**

At bars and restaurants, ingredients are working harder through multi-dimensional use – fresh, fermented, distilled, or infused – to extract maximum flavor and minimize waste.



“By layering techniques and reimagining single ingredients across serves, bars are crafting richer, more responsible experiences that honor both taste and the planet.”
Adrian Biggs, Director of Advocacy, Bacardi North America

In London, Dram’s “Duality” menu is focused on “exploring the duality of ingredients,” with many serves featuring two iterations across the bar’s two floors. Inspired by “the singularity

of different seasonal fruits, vegetables and herbs,” ingredients appear in complex and simple pairings. Its Apricot cocktail features a simple blend of ABERFELDY® 12 year old combined with bee pollen.

Singapore’s Native Bar and Restaurant takes this further: their third floor is set to be a fermentation-only space, turning ordinary fruits, grains, and herbs into unfamiliar, thrilling flavor experiences using the same ingredients.

This layering of technique and perspective ensures ingredients aren’t single-use, but part of a multidimensional story. As climate pressures intensify, and consumers demand both novelty and responsibility, bars will increasingly need to coax multiple lives out of every input.

Innovators are using fresh techniques to deliver on these new ingredient expectations. At Ryan Chetiyawardana’s

Lyanness in London, the boundaries between gastronomy and mixology dissolve, seeing the venue team up with scientists and agronomists to experiment with parallel fermentation and cryogenics. Cocktails like the Multi-Milk – blending GREY GOOSE® vodka, Scotch whisky, mushrooms, burnt milk, cultured milk liqueur, and milk wine – push dairy into new frontiers.

On-premise, innovators are leading the way with both low and high-tech solutions. “Superjuice,” a technique that extracts maximum flavor from citrus peels and pulp using acids and water, has become a quiet revolution: reducing waste, cutting costs, and extending shelf life without compromising taste. Already, over one quarter (26%) of respondents in the Bacardi GBAS, rank fruits local to their region as a growing area of bartender interest and experimentation.

Top SUSTAINABILITY Themes

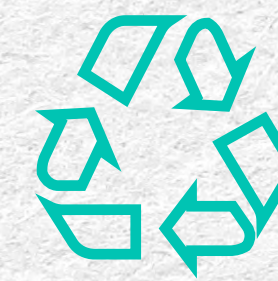
BACARDI GLOBAL CONSUMER SURVEY



39%
REDUCING
SINGLE-USE PLASTIC
& PACKAGING



37%
BUYING
LOCAL



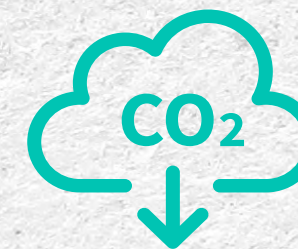
36%
RECYCLABLE
PACKAGING



30%
HELPING
PRESERVE
CLEAN WATER



29%
SUSTAINABLY
SOURCED
INGREDIENTS



25%
REDUCING
CARBON
FOOTPRINT



24%
BUYING
ETHICALLY SOURCED
PRODUCTS

MACRO TREND FOUR:

The Liquid EXPERIENCE IP

No longer just vessels for alcohol, cocktails and drinks brands are transforming into full-spectrum lifestyle experiences – blending fashion, music, design and travel into cohesive cultural identities. This evolution reflects a deeper shift in how consumers – particularly Gen Z and Millennials – choose to align with brands that embody who they are, not just what they drink.

Expect the rise of the “experience IP,” where cocktails themselves are becoming brandable, licensable assets akin to fashion drops or playlist vibes. Think signature serve merch, branded cocktail experiences, or scent diffusers inspired by a drink’s nose. In this world, a cocktail isn’t consumed – it’s lived.



Premium INFLUENCE

Consumers are investing in brands that influence the world around them, not just their wardrobes or bar carts. In a climate of careful spending, cultural relevance and emotional resonance are powerful drivers of value and loyalty.



“Premium today goes beyond price tag – it’s about cultural cachet and emotional connection.” Natasha Curtin, Global VP, BOMBAY SAPPHIRE

Culture now dictates purchase. Research shows that a brand’s cultural involvement and alignment have influence, with purchase intent doubling when activations reflect a brand’s distinct personality.¹⁰ And, it doesn’t just tip the scale on “yes” or “no” – it shapes spend. Some 70% of emotionally engaged consumers invest twice as much in brands they feel connected to, making influence itself a form of currency.¹¹

Partnerships are becoming the proving ground for this new premium. When BOMBAY SAPPHIRE® signed on as Official Gin Partner of the E1® all-electric boat championship, it wasn’t content with a logo. Instead, the brand wove itself into one of sport’s most forward-thinking arenas and exciting new championships, aligning its identity with the sleek innovation and cultural excitement surrounding the event.

Similarly, GREY GOOSE® positions itself not just as a vodka but rather a lifestyle, with a halo that extends beyond the bar: in Canada, half of consumers say they would choose a bottle of GREY GOOSE® as a gift over champagne, with a similar number (47%) in Australia (Bacardi GCS).

Already, across Europe and the Middle East, terraces and piazzas are becoming the new front rows – transforming luxury fashion shows into communal watch parties with cocktails to match. For drinks brands, they represent fertile ground for collaboration – where cocktails and premium spirits gain

visibility in the cultural calendar’s most exciting moments.

For Gen Z, these touchpoints are especially critical. Their identities are curated online, and 60% say they look to friends’ feeds for where to eat and drink.¹² If a brand shows up naturally in that scroll – a GREY GOOSE® cocktail glowing against aquarium glass, a BOMBAY SAPPHIRE® moment waterside during E1® – it isn’t just premium. It’s personal.

70%
OF EMOTIONALLY ENGAGED
Consumers
INVEST TWICE AS MUCH
IN BRANDS THEY FEEL
CONNECTED TO

LIVING *Cocktails*

Cocktail culture is transcending the bar, evolving into a lifestyle movement where drinks, design, and identity collide. From immersive residencies and branded merch to multi-sensory retail and story-driven content, consumers increasingly seek experiences that blur the line between product and world-building.



"As drinks brands embrace entertainment, community, and creative crossovers, sipping is becoming part of a broader cultural statement."

**Lauren Mote, Global Director
On-Trade Excellence, PATRÓN**

For emerging consumers, spirits brands that align with their wider lifestyles and identities are more likely to secure their higher spend – chosen by 41% of consumers in India, 34% in Mexico and almost one third (32%) of LDA Gen Z in the UK (Bacardi GCS).

Immersive spaces are setting the tone, providing experiential moments beyond the cocktail alone. The GREY GOOSE® Hôtel pop-ups are one example, inviting guests to “check in” to various events and locations to experience the drink’s own brand of cocktail-led escapism.

Elsewhere, residencies and crossovers are reframing how cocktails collide with culture, creating moments that are exclusive by design. Dante’s residency at Claridge’s Hotel turned a pop-up into a living exchange of bartending expertise, while Cloud 9 by Bâoli in Cannes elevates residencies into platforms for creative collaboration.

Iconic bars are finding ways to spill their influence into daily life, transforming signature serves into lifestyle products that serve to signal who consumers are, beyond what they drink.

Where popularity booms, product follows. At Tayēr + Elementary, number five on The World’s 50 Best Bars, it’s One Sip Martini inspired a collegiate-style line of T-shirts, sweatshirts and hats for in-the-know drinkers.

Meanwhile, London’s 2025 *Time Out*® Bar of the Year, Satan’s Whiskers, has harnessed the crossover between the production of alcohol and scent to create a range of branded candles inspired by historic cocktail books – allowing consumers to experience the brand’s offerings, in an unexpected way, and in the comfort of their own home.

Experiential entertainment crossovers are also gaining traction – as bars and venues tie themselves to TV and sports broadcasts to become a part of key cultural moments in time. The popularity of watch parties – for fan favorites like *Love Island*, *The Bachelor* and *Love is Blind* – are providing community for guests and traffic for bars – offering ample opportunities to create exclusive menus and drinks partnerships. Notably in Europe, bartenders report entertainment tie-ins as the most successful promotion increasing sales or traffic for the on-trade, ranked by almost two-thirds (60%) of respondents (Bacardi GBAS).



The Menu AS MEDIUM



Menu
#1
DRIVER OF CHOICE
BACARDI GCS

Cocktail menus have become cultural artifacts – equal parts coffee table book, zine, art object and brand capsule. They're no longer just functional – they're storytelling engines that invite guests into a curated world.

For today's drinkers, menus aren't just guides to ordering; they're storytelling engines that capture a venue's soul and invite guests into a carefully curated world. This evolution matters: the menu is now the number one driver of choice at the bar, outweighing even word-of-mouth recommendations across markets from France (50%) to Germany (45%) and Canada (41%) (Bacardi GCS).

Bars are responding by transforming menus into immersive media. In Mexico City, Bijou Drinkery Room gamifies the experience with its Rubik's Cube cocktail selector, giving guests over 80,000 possible combinations – from a Japan Jazz with BOMBAY SAPPHIRE®, yuzu sherbet and jasmine, to a Banana Republic cocktail with BACARDÍ® Ocho, banana, and chocolate bitters.

Narrative and nostalgia are raising the stakes, as bars hand over production-style budgets to curate menus as complete brand experiences. Maybe Sammy in Sydney launched its latest menu as a fictional hotel, complete with categories like Spa, Lobby and Mini Bar, and promoted

through cinematic trailers modeled after classic films.

From the grandeurs of film to literature, menu design is evolving into a statement of luxury, craft and creativity worthy of anticipation. In Dubai, La Petite Maison (LPM) has unveiled its latest creation: DéjàVu, an innovative new cocktail menu conceived as a vintage French editorial magazine. A tribute to the Golden Age of the French Riviera, the menu weaves the sun-drenched nostalgia of the region with LPM's signature approach to contemporary mixology. The Birkin – named after the French icon – is a sophisticated mix of Cantaloupe, BACARDÍ® Cuatro Añejo, "bittersweet Italian" Aperitivo, and tonic water.

The shift toward boundary-pushing menu design is no longer just about cultural cachet – it is emerging as a direct driver of bar sales and footfall. Three in five consumers check online menus to preview how cocktails look before they even step inside, making design and storytelling as influential as taste. Already, 39% of UK consumers check social media before deciding what

to order or where to go, making design and storytelling as influential as taste.¹³

Looking ahead, technology is set to push the menu into entirely new territory. Consumers are signaling a strong appetite for personalization: nearly nine in 10 in India, and more than 70% of Gen Z across Europe and North America, say they want drink recommendations tailored to their mood or taste. Crucially, they want AI to play a supporting role in personalization rather than creation. In Spain, almost two-thirds (64%) worry that AI could never replicate the artistry and emotional finesse of a human bartender.

The future of menus lies in this balance. Expect to see the rise of hybrid creativity, where menus evolve into dynamic mediums – capable of adapting to moods, motives and moments – while remaining anchored by human expertise behind the bar. In this vision, menus become both interface and invitation: smart enough to guide, but personal enough to preserve the theater, intuition, and artistry that makes cocktail culture unforgettable.

MACRO TREND FIVE:

MORE IS MORE

Mixology

After years of minimalism and casual drinking culture, bars are swinging back to bold, high-gloss escapism. Loud luxury is back with More is More Mixology – a new wave of nightlife spaces where opulence, sensory overload, and theatrical hospitality take center stage.

In a world saturated with digital fatigue and quiet luxury, these venues offer a joyful rejection of subtlety, tapping into guests' desire to dress up, show up, and feel transported.



A TASTE OF *Excess*

Maximalism is back on the menu as bars and restaurants embrace a bold, high-energy aesthetic that trades minimalism for mischief. In a time of economic pressure, consumers are seeking experiences that feel worth the spend – big on atmosphere, big on flavor, and big on fun. These venues deliver just that: high-impact, high-reward nights where every detail is dialed up. Think bottle-served cocktails, lavish interiors, and immersive escapism that offers maximum memory.



Nowhere is this shift clearer than London's Ambassadors Clubhouse, where a dedicated menu of “party cocktails” come served by the bottle and interiors are dubbed “lavishly anti-minimalist.” The space borrows the sheen of a private members’ lounge while leaning fully into the joy of excess.

Globally, consumers are rewarding this new age of mystique and spectacle. In Spain, unique venues are the number one reason guests reach for their phones, with 40% posting a cocktail photo if the setting feels extraordinary (Bacardi GCS).

And when it comes to celebration, spirits and cocktails are stealing the spotlight. Once the territory of champagne, these occasions are now defined by mixed drinks and premium pours. In Germany and Spain, cocktails have already overtaken Champagne as the go-to for marking big moments. Meanwhile, in Mexico, the U.S., and the UK, spirits lead the charge – chosen by 37%, 31%, and 26% of consumers respectively, as the preferred choice for celebratory occasions (Bacardi GCS).

This appetite for elevated experiences is fueling premiumization. More than eight in ten (86%) global bar professionals report trading up to better-quality, more premium spirits and cocktails, with tequila now ranked as the number one spirit for premium growth worldwide (Bacardi GBAS). This is mirrored at the most exclusive end of the market: Dubai's NAHATÉ recently sold the world's most expensive cocktail for USD 41,160, crafted by famous mixologist Salvatore Calabrese from a never-before-sold bespoke blend of PATRÓN® tequila, vintage cocktail modifiers from his private collection, and served in a 1937 Baccarat® crystal glass – one of only two in existence.

More than
8 IN 10
OF GLOBAL BAR PROFESSIONALS

REPORT TRADING UP
TO BETTER-QUALITY,
MORE PREMIUM SPIRITS
AND COCKTAILS

The theatre of excess isn't just about drinks, but the full cultural staging around them. Part of its ongoing partnership with The Tony Awards®, DEWAR'S® and French luxury crystal house Baccarat® created an exclusive speakeasy inside Radio City Music Hall®, blending two centuries-old crafts – whisky blending and crystal making – into one immersive world.





EXPERIENTIAL *Opulence*

If *A Taste of Excess* is about atmosphere, **Experiential Opulence** takes the drama to the glass itself. Around the world, cocktails are transforming into edible theater – sensory spectacles that blur the line between drink, art, and performance. This is indulgence turned interactive: levitating serves, culinary mashups, and playful illusions that keep guests talking (and posting) long after the last sip.

Consumers are willing to pay for the spectacle. Multi-sensory cocktails are the second most popular reason drinkers say they'll spend more in certain markets – chosen by 31% of young LDA consumers in the UK, 28% in Spain, and 27% in the Netherlands (Bacardi GCS).

At Shinji's in New York, the namesake Gin Fizz epitomizes the “more is more” mindset: a frothy mix of BOMBAY SAPPHIRE® Premier Cru gin, citrus

marigold, cream, and egg white, chilled with liquid nitrogen for a high impact serve.

Notably, over-the-top presentation is a major driver of shareability: one quarter of drinkers in the U.S., UK, and Australia say they'd post about a cocktail for its presentation alone, rising to one third of Gen Z in the UK (31%) and Canada (32%), and 36% in Australia.

Elsewhere, bars are raising the stakes with whimsical storytelling, the more unexpected the better. This is part of the allure at the number four World's 50 Best Bars 2025, Paradiso in Barcelona – a speakeasy hidden behind a sandwich shop. The bar prides itself on concocting drinks that are playful, and often interactive – like cocktails hidden in a Japanese Fukuruma doll or presented inside of a glowing seashell. It's a multi-sensory show with a deep commitment to both flavor and fun.



FANTASTICAL *Flavors*

Flavor is getting fantastical as consumers crave escapism, imagination, and novelty on the palate. In a world that feels increasingly surreal, bold and unexpected taste combinations offer a playful rebellion against the ordinary – transforming eating and drinking into an act of sensory enjoyment.

Bold, unexpected, and often playful, flavors are becoming a canvas for escapism as consumers seek joy and novelty in what they eat and drink. For a generation that feels reality itself is increasingly strange – with 71% of consumers agreeing “the real world feels surreal” – cocktails are embracing the bizarre, the imaginative, and the boundary-pushing.¹⁴

Flavor experimentation isn’t just niche indulgence, it’s a driver of consumer delight: 40% of consumers say rich flavor makes for an impressive experience, while 22% are actively seeking intense and bold tastes.¹⁵

At the Wynn Las Vegas, the Monaco cocktail epitomizes this desire for sensory overload – combining lemon basil vodka, ST-GERMAIN®, rosé champagne, and butterfly pea blossom tea with a spritz of edible seaside parfum spray. Finished with “electric dust” that tingles on the tongue, it’s a drink designed as much for wonder as refreshment.

In New York, Superbueno’s Green Mango Martini reinvents the classic with tequila infused with fresh green mango, layered with Sauternes, mango *eau de vie*, honey, and chili oil. A clean serve with tropical-savory complexity, it redefines how a Martini can feel.

In Europe, indulgence itself is a key motivator, with research confirming that it plays a central role in the search for joyful moments.¹⁶ The result: menus

that blur science, art, and flavor into moments of edible theater.

Bars like SIPS in Barcelona – ranked third in The World’s 50 Best Bars 2025 – specialize in turning the ordinary extraordinary. Even a classic Negroni surprises when served over “ice that doesn’t melt,” a playful detail that transforms the familiar into a curiosity. Others, like New York’s Sip & Guzzle – a new entry to The World’s 50 Best Bars for 2025 and home to Michelin-star Chef Mike Bagale – are serving cocktails styled as Japanese nigiri sushi or offering a Tomato Tree cocktail infused with multiple dill strains. It’s a showcase of fine dining through mixology-as-art.

Together, these venues signal a shift: cocktails are no longer confined to balancing sweet, sour, and bitter. They are tools of imagination, delivering intensity, novelty, and surprise that feel almost otherworldly.

Conclusion

The connective spirit that defined 2025 continues to flow, but in 2026 it has a new twist. What began as a desire for shared celebration has evolved into a broader movement – one that celebrates cocktails not just as drinks, but as catalysts for creativity, connection, and cultural discovery.

In 2026, cocktails are becoming a language of their own – a way to express identity, mood, and community in real time.

“

“The cocktail is evolving from product to performance, It’s a creative act – one that reflects how people want to express themselves, connect with others, and celebrate culture in new, fluid ways.” Martin Raymond, The Future Laboratory, Co-Founder

For brands, this means thinking beyond their usual remit. Cocktail culture is expanding into new spaces, formats, and moments, finding relevance wherever people seek fun, belonging, or inspiration. At the center of this evolution is Gen Z – a generation redefining what it means to drink and to celebrate. They’re designing the moment as much as the cocktail, with a definition of premium that is expanding to include values of authenticity, sustainability, and cultural storytelling – reshaping the landscape for every part of the industry.



Citations

CLICK ON EACH LINK TO ACCESS THE SOURCE



01

'Why 6:12pm is the new 8pm',
Zonal, 2025 - **page 5**

04

'The Future 100 – 2025', VML
Intelligence, 2025 - **page 10**

08

'The New Nightlife: Gen Zers soft
clubbing proves the party isn't over, it's
evolving', Eventbrite, 2025 - **page 11**

12

'How to Win with Gen Z', CGA by NIQ,
2025 - **page 20**

16

'Consumer Trends 2025 in Europe',
Innova Consumer Insights 2025 -
page 26

02

'How to Win with Gen Z', CGA
by NIQ, 2025 - **page 8**

05

'The Future 100 – 2025', VML
Intelligence, 2025 - **page 10**

09

'The Future of Food Labelling in the US',
NSF, 2025 - **page 15**

13

'What today's cocktail drinkers really
want – and how to win their spend',
CGA by NIQ, 2025 - **page 22**

03

'Putting on the Spritz: The Aperitivo
Growth Opportunity', 2025 - **page 8**

06

'Why the Third Space is a Priority to
Reach Gen Z' CGA by NIQ, 2025 -
page 11

10

'Societal Sync', MAGNA,
2025 - **page 20**

14

'The Future 100 – 2025', VML
Intelligence, 2025 - **page 26**

07

'Why the Third Space is a Priority to
Reach Gen Z' CGA by NIQ, 2025 -
page 11

11

'Loyalty Deciphered: How Emotions
Drive Engagement', Capgemini,
2022 - **page 20**

15

'Consumer Trends 2025 in Europe',
Innova Consumer Insights
2025 - **page 26**



2026 BACARDI *Cocktail* TRENDS REPORT



PRESENTED BY BACARDI LIMITED
IN ASSOCIATION WITH THE FUTURE LABORATORY

©2025 BACARDI
BACARDI, THE BAT DEVICE & OTHER MARKS RELATED TO PRODUCTS IN THIS DOCUMENT ARE TRADEMARKS
OF BACARDI & COMPANY LIMITED OR OF OTHER SUBSIDIARIES OF BACARDI LIMITED

