



2025

BACARDI

Cocktail Trends

REPORT



PRESENTED BY BACARDI LIMITED

IN ASSOCIATION WITH THE FUTURE LABORATORY

CONTENTS *Page*

INTRODUCTION	03
ONE: PREMIUM FANS	04
TWO: IN-THE-KNOW IMBIBING	08
THREE: NEW COCKTAIL FRONTIERS	13
FOUR: CULINARY CONNOISSEURS	17
FIVE: THE FUTURE SPIRIT	22
CONCLUSION	26



INTRODUCTION

In 2024, spirits weathered sector headwinds and the sea change of consumer mindsets looking for new connections with brands. Companies turned to creativity (the creation of new value drivers), adaptation (the ability to adapt) and fortitude (the resilience to drive industry-wide improvement) to capture the attention and love of fans.

As consumers increasingly embrace a culture of mindfulness and discernment, (from ABV, to purpose and everything in between), traditional alcohol consumption is emerging re-imagined. Here, the focus is on evolution, rather than transformation, with flavor-centric, experience-focused, and expert-led developments setting the industry's mood for incremental innovation. These shifts are offering spirits brands fresh avenues to engage with consumers, integrating into their daily lives, entertainment preferences and kitchens in unexpected ways.

Following declines in 2023 and continued challenges in 2024, IWSR forecasts that global beverage alcohol is expected to begin its recovery in 2025, but the landscape – including consumer tastes, values and expectations – looks markedly different today.¹

“Shifting consumer mindsets are set to enable longer-term premiumization,” explains The Future Laboratory Co-Founder Martin Raymond. “That’s because today’s consumers are moving away from being ‘consumers’ of products, to ‘curators’ and ‘collectors’ of experiences. Future brands will welcome – not avoid – this sea change, taking the necessary steps to create individual, community and industry meaning that enhances the value of brand experiences end-to-end.”

In 2025, the drinks business will embrace this industry homecoming, replacing the constant drive for “more” and “new,” with

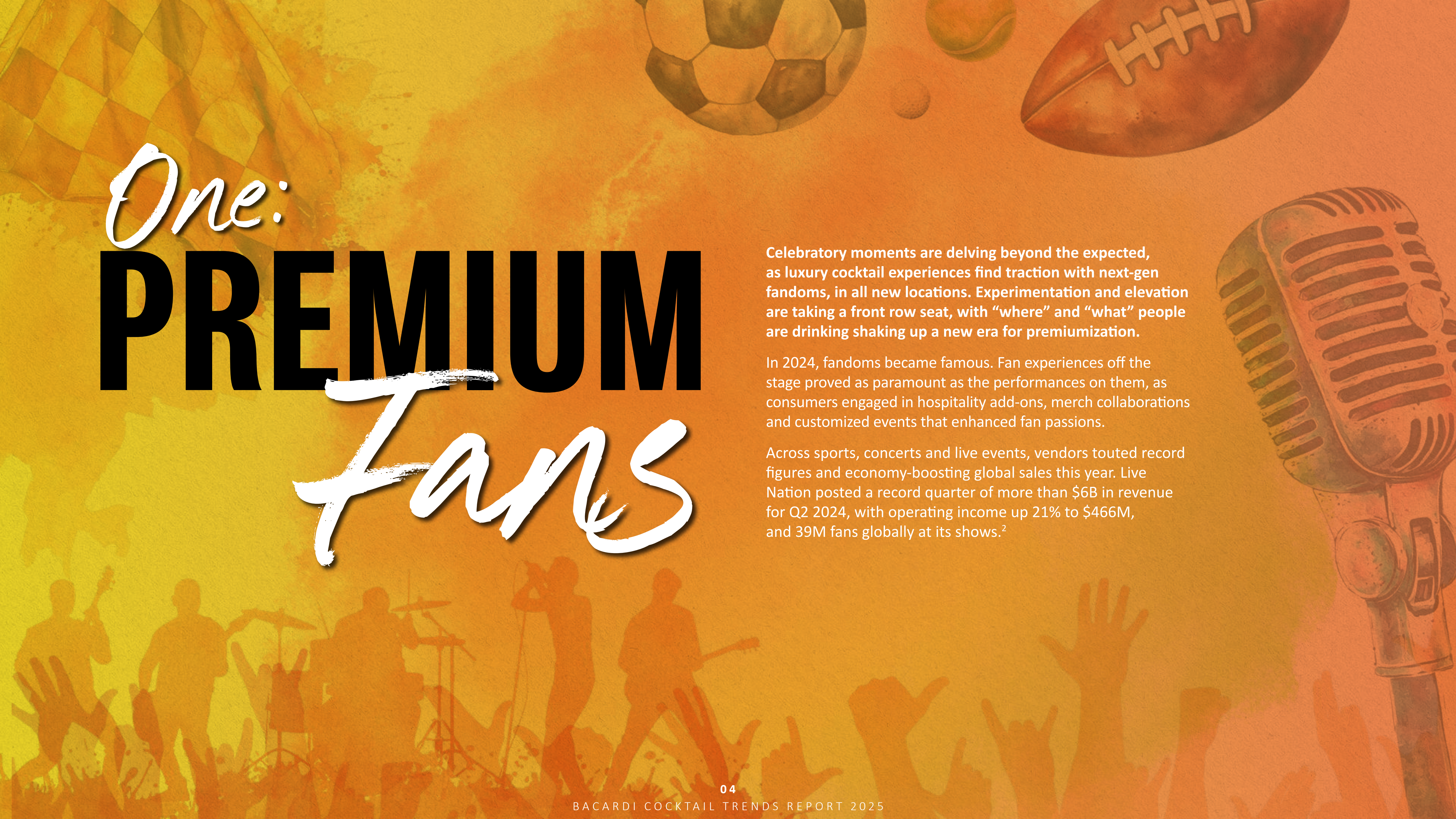
simply “better” – setting the stage for an era that is more uplifting, exciting and valuable, for all. From human-first mindsets that prioritize drinks’ craft and creativity, to next-gen fandoms forging new brand touchpoints to future-first mindsets bringing all-new meaning to community spirit – drinks brands of 2025 will adapt to take on a more meaningful role in consumers’ lives.

In this report, Bacardi Limited, the world’s largest privately held international spirits company, explores the key trends set to shape a new era for cocktail culture and the spirits business in 2025. This report, 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.

“TODAY’S CONSUMERS ARE MOVING AWAY FROM BEING ‘CONSUMERS’ OF PRODUCTS, TO ‘CURATORS’ AND ‘COLLECTORS’ OF EXPERIENCES.”

MARTIN RAYMOND
THE FUTURE LABORATORY
CO-FOUNDER





One: **PREMIUM** Fans

Celebratory moments are delving beyond the expected, as luxury cocktail experiences find traction with next-gen fandoms, in all new locations. Experimentation and elevation are taking a front row seat, with “where” and “what” people are drinking shaking up a new era for premiumization.

In 2024, fandoms became famous. Fan experiences off the stage proved as paramount as the performances on them, as consumers engaged in hospitality add-ons, merch collaborations and customized events that enhanced fan passions.

Across sports, concerts and live events, vendors touted record figures and economy-boosting global sales this year. Live Nation posted a record quarter of more than \$6B in revenue for Q2 2024, with operating income up 21% to \$466M, and 39M fans globally at its shows.²



Elevated ENTERTAINMENT

Beyond the popularity of crowd entertainment, complementary experiences are on the uptick, with a focus on premiumization. Valued at \$4.7B in 2020, the global sports hospitality market is expected to grow by 23% CAGR to reach \$20.2B in 2027, according to Research and Markets.³ Meanwhile, more than 8 in 10 Gen Z's are willing to spend big for in-person events, according to 2024 research from Merge, with food, beverage, apparel and accessories topping the spending categories.⁴



Luxury hotels and hospitality venues are becoming prime hotspots for concert goers looking to enhance their total experiences. “Chasing the Concert” is now a certified travel motivation, as event goers look to transform live tours into complete vacation experiences that comprise traveling to a new city or country, visiting exciting hotels and tapping up food and drink hotspots.

In 2024, Embark Beyond identified Taylor Swift as a key driver of demand to Paris for luxury travelers, with the Shangri-La Paris recording a 120% increase in bookings over the star’s May arena dates.⁵ The mega star has given the British on-trade an estimated revenue boost of £78.4M (\$103.3M) in summer 2024 – with fans of legal drinking age (LDA) spending around £52.7M (\$67.8M) on drinks, including 1.15M glasses of spirits, over the 15 tour dates.⁶

The Four Seasons Hotel London at Park Lane was quick to recognize this premium fan pull, offering “gig-tripping packages” complete with welcome drinks, portable phone chargers and plush hotel suites equipped with karaoke machines. During Taylor’s local tour stop the Loews Miami Beach Hotel served up The French Blonde made using BOMBAY SAPPHIRE®, aperitif, ST-GERMAIN®, grapefruit, lemon bitters and Make the Whole Place Shimmer made with BACARDÍ® Superior, lime, strawberry, and a shimmery pear smoke-filled bubble.



In 2025, we can expect these activations to diversify across demographics. Dua Lipa, Coldplay and Billie Eilish are all taking to the stage next year, while the highly anticipated Oasis reunion tour is sure to spark a wave of new fandom activations.

Technology is taking fan culture to new heights, elevating spectatorship by offering dynamic new ways to enjoy entertainment, sports, art and music. At Cosm, immersion is the order of the day. The venue’s 9,600-square-foot, 8K-resolution screens bring viewers closer to the action than ever before – creating an all-encompassing experience that captivates and transports audiences – introducing the VIP-viewing experience to a wider audience.



NEW CROWD *Choices*

As sports entertainment grows, its crowd is also diversifying, leading to a shift in the types of venues consumers seek out, and the drinks they order, or make at home.

Nielsen recorded a 123.7M-strong viewership for the 2024 Superbowl, with almost half of the attendees being women.⁷ Research from instant commerce platform Gopuff saw an increase of spirit and mixer sales up by nearly 90% on the day, just 12% behind traditional fan-favorite, beer.⁸ Notably, the Bacardi Global Consumer Survey reveals that one third (33%) of respondents in India, and over one quarter of respondents in the U.S. (27%) and Mexico (26%) identified watching sports at home as key occasion for enjoying spirits in 2025.

On-premise, bars are also recognizing this preference shift. Luxury London hotel, 11 Cadogan Gardens, launched a luxe Sport and Sip Garden in summer 2024. The boutique hotel offered a tailored drinks menu – including summer spritzes – to accompany 2024 Wimbledon® and UEFA® European Championship matches.

Innovative venues aren't just catering to fandoms, but creating them too, providing a platform for lesser-known teams and creating



cultural moments and cocktail experiences to match. At New York's Dead Rabbit, Irish sports are the only ones on the menu.

Part of its commitment to showcasing modern Irish culture, the venue hosts Hurling, Gaelic Football and Irish rugby team games. Visitors can sip on a host of Irish Coffee cocktails made with TEELING® small batch Irish Whiskey, including a frozen iteration which combines the spirit with Mr. Black coffee liqueur, cold brew coffee, cane sugar and cream.

Officially dubbed the “biggest cocktail in sports,” the popularity of the US Open's Honey Deuce cocktail shows no sign of abating.⁹ Made with GREY GOOSE® vodka, raspberry liqueur, lemonade, and garnished with honeydew melon in the shape of tennis balls, the drink provides an annual viral moment, as attendees flock to share the drink on socials and save the cup as a memento. With 2024 sales of the cocktail reaching \$12.4M, its resilience and cultural influence showcases the power of more premium serves on site.¹⁰



FAST LANE

Libations

With its accessibility and cultural cachet booming in 2024, fans are racing to Formula 1® (F1®). The international sport has undergone a celebrity and TV network-endorsed reimagining of late. ESPN® now airs all races of the competition in the United States, while star-studded crowds have featured the biggest names across sports and entertainment.

The star power of drivers themselves has also been seismic. Grand Prix Winner George Russell became the latest Tommy Hilfiger® ambassador in 2024, fronting its motorsport-inspired collection. MVP Index reveals that drivers collectively amassed \$15.9M in brand value across three races last year, while grid additions – including the Miami and Las Vegas Grand Prix – became trending Google search topics with a growth of 5,000%+, according to U.S. Google® search data from 2023.

It might be an unmissable sporting moment across the globe, but fans are not just passionate about the big personalities, intense battles, and cutting-edge technology of F1® but also the moments that come together to make race weekends unique and exciting.

PATRÓN® tequila is along for the ride. The brand has established a long-standing partnership with Mexican racing icon, Sergio “Checo” Pérez. Spanning social content, event appearances and a limited-edition PATRÓN® Mexican Heritage Tin released during the first annual Las Vegas Grand Prix, the 360-partnership illustrates how brands can align with next-gen sport fandoms, wholly authentically.

Furthering its cultural reach, Warner Bros. Pictures® is set to release the film “F1”, starring Brad Pitt in theaters globally in June 2025.



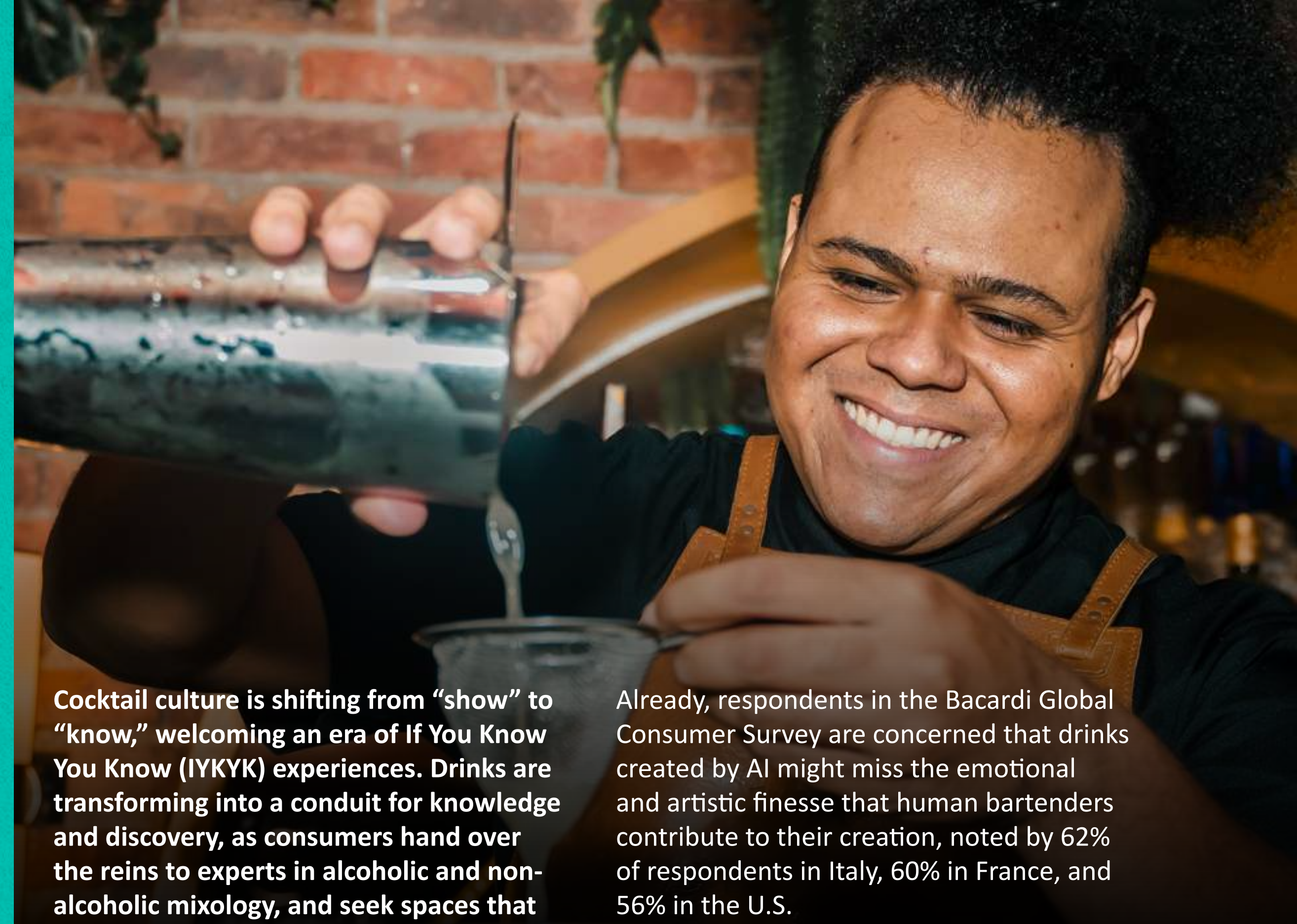
“BRANDS THAT GO BEYOND TRANSACTION CAN CULTIVATE MEANINGFUL INTERACTIONS THAT TRANSFORM CONSUMERS INTO LOYAL ADVOCATES, FOSTERING A LASTING BOND THAT TRANSCENDS THE ORDINARY.”

TONY LATHAM
REGIONAL PRESIDENT NORTH AMERICA
BACARDI

Two: IN-THE-KNOW Imbibing

“THE DISCOVERY OF NEW COCKTAILS GOES BEYOND FLAVOR AND NOW EXPLORES THE INSIDER VIEW OF CRAFT, HISTORY, AND COCKTAIL MAKING SO THEY CAN PROUDLY SHARE THAT KNOWLEDGE WITH OTHERS.”

IRINA RODINA
SVP MARKETING STRATEGY AND OPERATIONS
BACARDI



Cocktail culture is shifting from “show” to “know,” welcoming an era of If You Know You Know (IYKYK) experiences. Drinks are transforming into a conduit for knowledge and discovery, as consumers hand over the reins to experts in alcoholic and non-alcoholic mixology, and seek spaces that help them connect, learn and discover something new.

In 2024, the onset of new technologies – generative Artificial Intelligence (AI) chief among them – placed a spotlight on the power of human touch. Connection, craft and creativity are now prized ingredients for meaningful experiences, with 2025 set to be the year for drinks moments that showcase knowledge, and illustrate the importance of true, time-honed expertise.

Already, respondents in the Bacardi Global Consumer Survey are concerned that drinks created by AI might miss the emotional and artistic finesse that human bartenders contribute to their creation, noted by 62% of respondents in Italy, 60% in France, and 56% in the U.S.

More intimate brand interactions are playing a key role in driving value. Key to forming these connections are the experts; the face and voice behind brands is now more important than ever. Dazed Media reports that working with relevant cultural partners has become increasingly key to a brand’s influence, rising by 217% since 2020.¹¹

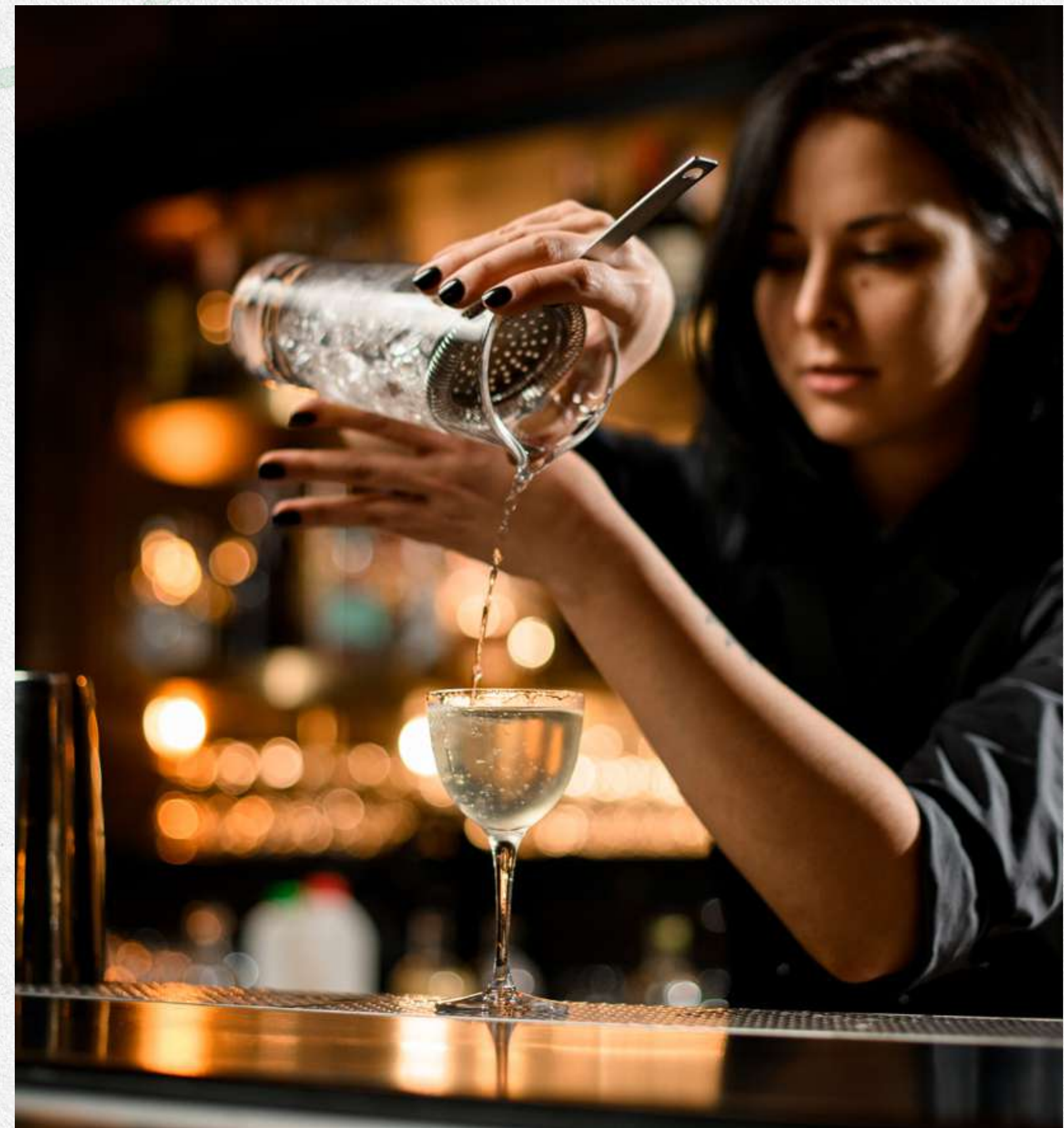
Expert PRIORITIES

Now, bartenders are occupying an all-new influential role in cocktail moments, transforming into the designers, educators and opinion leaders of meaningful on-premise experiences. Globally, over one third of consumers say their drink choices are influenced by bartender recommendations, with almost two thirds (59%) of respondents in the UK agreeing that they can be swayed by bartender advice, even after making their drinks decision, according to CGA.¹²

That's the inspiration behind the fresh, innovative design at Barcelona's Sips. Ranked third among the world's best bars in 2024,

Sips aims to make the connection between those making the cocktail, and those drinking them, more trusting than ever. By eliminating the physical presence of the bar, Sips expands the possibility of human exchanges, allowing creativity to be shared between bartenders and customers.

Education is at the heart of nurturing these moments and ensuring that bar staff become the necessary first port of call for consumers. The Bacardi Global Brand Ambassador survey reveals that learning new skills is ranked among the top areas of development for bartenders, followed by brand (50%), category (39%) and drinks education (38%).



New CULTURAL Codes

The growing reverence of drinks expertise is proving culturally influential too, as cocktail-themed coffee table books preserve the mixology styles, secrets and recipes of famed drinks creators and institutions. Take 2024's "The Connaught Bar: Recipes and Iconic Creations," which presents 100 of the historic London hotel's lux libations. Elsewhere, "The Bartender's Pantry" brings together recipes from the world's most creative bartenders. Author Jim Meehan has helped pave the way for this generation's craft cocktail industry – occupying influential positions at New York's Gramercy Tavern, The Pegu Club and PDT.

With this new era of knowledge ensuring consumers are more informed than ever, mixologists are getting creative to keep customers excited and engaged in cocktail culture: creating new drinks mashups, rituals and in-the-know orders. In 2024, agave-based serves continued to dominate the cocktail conversation. The Bacardi Global Brand Ambassador Survey reveals that respondents globally ranked tequila number one (72%), followed by mezcal (66%) among the top spirits of interest.

ILEGAL MEZCAL® is already delving into experimentation for the category's new age, launching a limited-edition Reposado Caribbean Cask Finish in 2024. The new expression was finished in Caribbean rum barrels to bring a vibrant influence to the brand's agave-forward character – taking aged mezcal to all new heights.

In 2025, we can expect this popularity and experimentation to give way to new secret edition serves that take the category beyond the expected Margarita and Paloma orders. Served at Mexico City's Licorería Limantour, ranked among the world's best bars, Margarita al Pastor puts a culinary spin on the cocktail classic with the addition of pineapple juice, fresh herbs and serrano chile inspired by the city's tacos al pastor flavors.

La Batanga, the region's spin on a Cuba Libre, a simple mix of tequila, Coca-Cola®, lime and a salted rim has received its own host of "in-the-know" iterations. Next-gen drinkers can order it pintada ("painted," with a splash of soda water), divorciada ("divorced," or deconstructed) or quemada ("lightly burned," with the ice slightly melted before serving).¹³

*TEQUILA
RANKED
#1



*IN TOP SPIRITS
OF INTEREST BY
AMBASSADORS

*MEZCAL
RANKED
#2

Next-gen drinking rituals are also having a moment – combining high-end spirit serves with in-the-know accompaniments. Take the "Goose Bumps" caviar chaser. Cocktail connoisseurs are using the delicacy as a premium follow-up to GREY GOOSE® Altius vodka. At The Surf Lodge in Montauk, guests can enjoy the glacially smooth spirit alongside a caviar pairing – elegantly served from a specially-designed drinks cart.



MAINSTREAM *NoLo*

The integration of NoLo into the mainstream, means that Low ABV serves are also getting the expert treatment, with innovators ensuring that consumers – regardless of their choices – are rewarded with exciting, elevated serves. Over one half (51%) of the respondents to the Bacardi Global Brand Ambassador Survey pinpointed Low ABV as the trend they expect to grow across the next 12 months.

For Nobu's® zero proof cocktail menu, the brand teamed up with green tea expert Zach Mangan who understands the importance of working with terroir, cultivator and flavor. The drinks creations worked as an additional revenue stream for the restaurant – highlighting the success of integrating NoLo into existing offerings, and, treating them with the same reverence as full ABV serves.

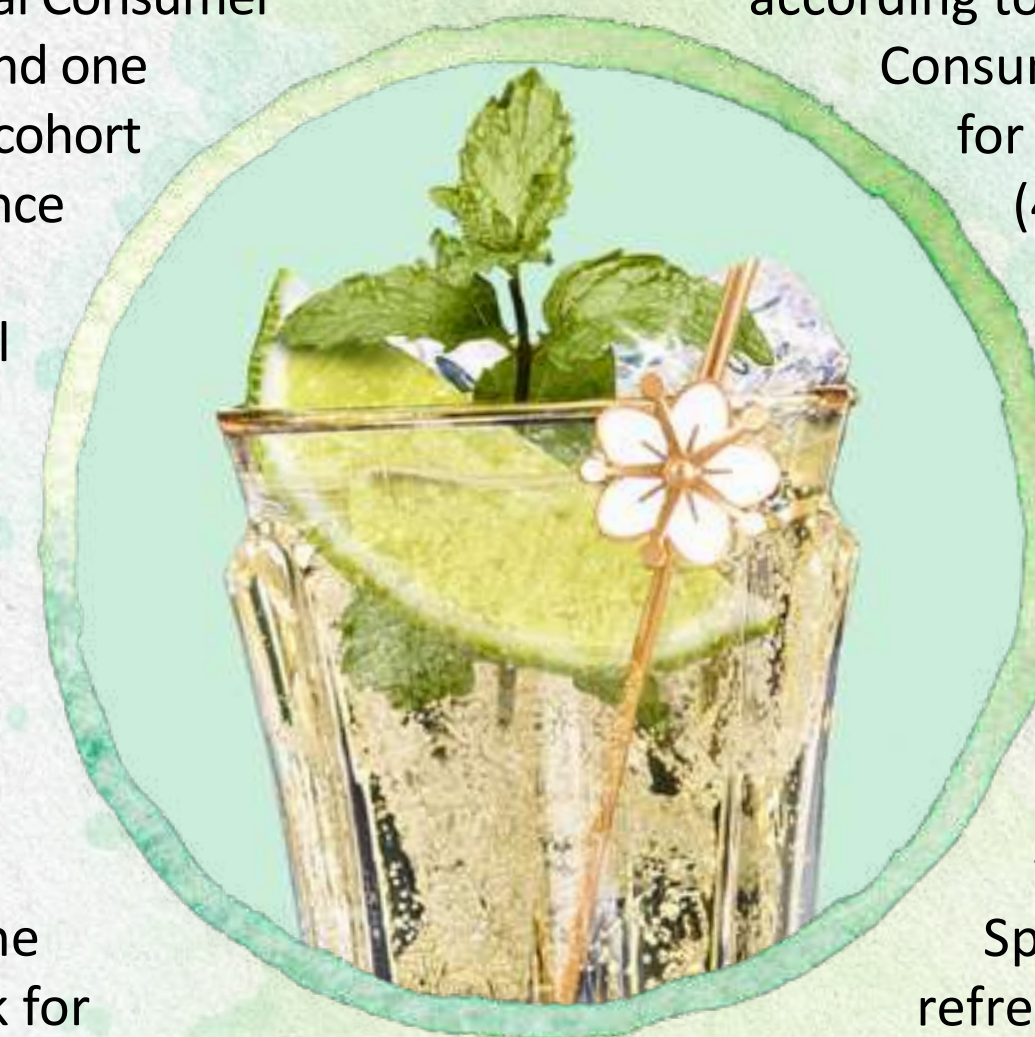
Consumers continue to focus on mindfulness over moderation. Dry January is falling out of favors as next-gen drinkers flex their freedom to choose elevated lower ABV drinks year-round. The Bacardi Global Consumer Survey reveals that around one quarter of the youngest cohort (LDA) in India (29%), France (25%), the U.S. (20%) drink more lower alcohol cocktails today, while 20% of all Japanese consumers agree.

The thriving appetite for the Spritz is case in point. 2024's star, the ST-GERMAIN® Hugo Spritz, continues to shine brightly as drinkers look for something lighter to sip. Search volume for the category continues to grow year on year, with consumers now becoming

more discerning with their spritz queries. Hugo Spritz searches surged 172% this year, while ST-GERMAIN® Spritz rose by 52%, according to Google data in the UK, U.S. and France. In Europe, the Spritz is dethroning Champagne as the drink of choice for getting together with friends, chosen by more than three quarters of respondents in Italy (77%), almost half in Germany (49%) and more than two fifths in Spain (41%), according to the Bacardi Global Consumer Survey.

The serve remains the drink of choice when getting together with friends, according to the Bacardi Global Consumer Survey, ranked top for more than two fifths (41%) of all respondents.

As the category becomes a phenomenon in its own right – flavor experimentation and evolution are growing. A favorite at London's Soho House, the MARTINI® Vibrante Spritz combines the refreshing flavor of grapefruit with the classic wines, herbs and botanicals of the MARTINI® Non-Alcoholic Vibrante Aperitivo.



TOP BAR CALLS *for* 2025

1

MOJITO

2

MARGARITA

3

SPRITZ

4

PIÑA COLADA

5

GIN & TONIC

6

RUM & COKE®

7

WHISKY & COKE®

8

DRY MARTINI COCKTAIL

9

VODKA LEMONADE

10

VODKA SODA

11

ESPRESSO MARTINI
(VODKA OR TEQUILA)

12

IRISH COFFEE

13

TEQUILA SUNRISE

14

GIN LEMONADE

15

BLOODY MARY

16

DAIQUIRI

17

CAIPIRINHA

18

MIMOSA

19

TEQUILA SODA

20

WHISKY HIGHBALL

BACARDI GLOBAL CONSUMER SURVEY

Three: NEW COCKTAIL Frontiers

A mood for exploration is taking drink flavors, formats and moments to all-new immersive heights, as consumers seek 360 experiences that enhance their favorite serves.

With doomscrolling, digital fatigue and cultural disillusion on the rise, imagination is consumer's new North Star. VML Intelligence reports 72% of people wanting as many of their senses as possible to be satisfied when experiencing something new.¹⁴

This drive is setting the stage for a new breed of engagement, as intense emotions – wonder, awe, joy and excitement – become a prerequisite of brand expectations and experiences. In the drinks world, 2025 will

see brands and bartenders take a multi-sensory approach to flavors and formats – delivering exciting cocktail moments that entice consumers.

It's an approach set to be welcomed by next-gen drinkers. According to the Bacardi Global Consumer Survey, respondents in India, Mexico, Italy and the UK ranked cocktails that provide a multi-sensory experience as a key reason for paying more.

This move goes hand-in-hand with the mood for premiumization, as consumers seek enhanced cocktail moments end-to-end, and the chance to experience them fully.



SOUNDTRACKED *Sips*

Future-facing brands are harnessing the power of music and sound to create 360 moments that enhance, and outlast, taste alone. Welcome to the era of soundtracked sips. In 2024, BACARDÍ® rum tapped artist Camila Cabello to create a sugarcane vinyl release of song “I LUV IT.” Crafted using repurposed materials and sugarcane from Bonsucro®-certified suppliers, the sell-out vinyl showcased the intertwining mood for serves and sounds.

Beyond summer soundtracks, innovators are looking to full sonic immersion to take individuals on a journey of discovery and enjoyment. DEWAR’S® Blended Scotch whisky enlisted the voice of whisky expert Gabe Cardarella to narrate an audio track that transports listeners to the brand’s Scotland home – exploring the origins of the blend’s malts and grains. The track, which celebrates whisky-tasting experiences, was introduced with the launch of the DEWAR’S® Double Double 38 Year Old expression.

On-premise, mood-conscious venues are recognizing the value of pairing serves with sounds – even collaborating with specialty playlist creators to ensure a space’s ambiance hits the right note. Gray V, based in New York, collaborates with music professionals to produce bespoke playlists for restaurants and bars. The dedicated company taps into the notion that music can affect diners’ perceptions of food and drink – with background noise even shown to alter how people taste.



GABE CARDARELLA
WHISKY AMBASSADOR



IMMERSIVE *Venues*

"HAVING A COCKTAIL GOES BEYOND WHAT'S SERVED IN YOUR GLASS. IT'S ABOUT THE COMPLETE EXPERIENCE OF THE PERFECTLY CRAFTED DRINK, THE MEMORABLE VENUE, AND THE MOMENT YOU SHARE WITH OTHERS."

SEAN KERRY
VP GLOBAL ON-TRADE
BACARDI

It's not just how people are enjoying drinks that is transforming, but where. The Bacardi Global Consumer Survey notes that across regions, the mood for traditional nightlife continues to decline. Around half of respondents in Germany (56%), the U.S. (52%), the UK (51%) and Spain (46%) will go to nightclubs less often next year.

With cocktail moments now undergoing an early evening makeover, expect 2025 to be the year of exciting new venues that place experience and immersion at their center. Catering to these changing nightlife habits, listening bars are emerging as an alternative to buzzy clubs – with the focus here on the complementary connection between the music and the menu. It's a drive set to be

welcomed by the younger cohort (LDA), where over one third in India (37%) and over one quarter in Italy (27%) plan to visit more listening bars next year, according to the Bacardi Global Consumer Survey.

Take London-based Equal Parts – a floor-to-ceiling listening bar where the mixologists double up as DJs – creating a holistic sonic experience in tune with the serves. In Japan, pioneers in the on-premise are taking these moments one step further to ensure a visitor's focus is fully on flavors and sounds. Located just outside Tokyo's Shibuya district, Nova is a scene favorite where curated soundscapes and sleek design transport guests on a sensory journey. It's a haven for music lovers seeking a unique, atmospheric escape.

MULTI-SENSORY *Serves*

Experiences that interplay multiple senses are the next frontier – as on-trade innovators harness the power of synesthesia to bring further engagement and experiential gravitas to cocktail moments. This focus is set to be celebrated by the new wave of experience-focused drinkers, who across the UK, the U.S., Italy and Mexico list presentation and preparation among their top reasons for photographing their drink, according to the Bacardi Global Consumer Survey.

Tapping this drive, Ginger.Lily, the Hilton Singapore Orchard's botanical-inspired bar and lounge, presents "Synaesthesia," a multi-sensorial cocktail adventure that explores the intersection between nature, technology and the five senses. Creations make the most of unconventional elements such as edible perfume sprays, colored eyeglasses and house-made distillates. The Aroma Alchemy combines beetroot distillate, pineapple, passionfruit, jackfruit, rosemary, vinegar cider, ginger ale and Foamee® and shrub with a choice of edible scents curated by the hotel's bar mixologist. Meanwhile, the Cloud cocktail is comprised of notes of toasted marshmallows, vanilla and caramel while the Nature cocktail merges bergamot, citrus and blooming florals.

At the industry's largest event, Tales of the Cocktail (TOTC) in New Orleans, BOMBAY SAPPHIRE® captured guests' visual palettes and taste palates by removing (and then replacing) color in an exhibit. Guests ventured into an art exhibit featuring photography from mixologists who also embrace the art of taking pictures – each with their own unique style. The exhibit played visual tricks by using monochrome lighting that removed all color from the scene creating a colorless ambiance. Patrons then used special flashlights that, when directed at an image, transformed the photos from sepia tones to full tone images, bursting through with light and brightness. The play on color was a nod to how mixologists turn to photography, and other creative mediums, to tell visual stories when designing drinks and creating an ambiance at the bar.





Four: **CULINARY** *Connoisseurs*

As food becomes a certified status symbol, mixologists will experiment with culinary alchemy to give classic ingredients all-new reverence. A fresh approach to pairings will see core kitchen staples – butter, oil, milk – paired with premium spirits to entice a new wave of gastro-discerning drinkers.

The phrase “you are what you eat” is taking on new meaning in the face of hype foodies and status snacking, with individuals’ grocery baskets receiving a certified social makeover. Already, some 52% of international consumers agree that it would be “amazing” to have an instant buy button for snacks they discover on social media, according to Mondelez’s State of Snacking Report.¹⁵

In an era when content is king, culinary arts are claiming the crown – carving a top spot on small and big screens alike. Look to the recent success of streaming series like “The Bear,” or films such as “Boiling Point” and “The Menu,” which testify to global audiences’ heightened appetite for entertainment rooted in food and fine dining.



INFLUENTIAL *Foodies*

Private chefs are taking over as key sources of influence. Rob Li and Meredith Hayden are among leaders of the pack, sharing their culinary creations for their celebrity clientele, as followers watch on eagerly with all the anticipation of a “behind-the-scenes” exclusive. Meanwhile, 2024’s food influencers – including “Cucumber Guy” Logan Moffitt and Nara Smith – are setting the culinary trends for 2025. Smith is known for familiarizing people with new techniques and equipment, pioneering the idea that everything can be made from scratch, from sodas and cereals to bubblegum and barbecue sauce.

Prepare for the drinks world to take note. Already, the Bacardi Global Brand Ambassador Survey reveals that culinary creativity is now a key source of inspiration for bartenders creating new cocktails, listed by almost three quarters (71%) of respondents – and ranked second only to social media.

This creativity is set to match consumer interest. In the face of ongoing economic uncertainty, food looks to remain resilient. McKinsey reports that two fifths (40%) of Millennials and over one third (36%) of Gen Z in the U.S. intend to splurge on food in 2024, illustrating the ever-growing popularity of premium grocers such as Los Angeles’ Erewhon, London’s Panzer’s Deli and Paris’ La Grande Épicerie.¹⁶



SAVORY *Serves*

In 2025, drinks innovators will take inspiration from this new wave of culinary connoisseurship, with food becoming central to premium drinking experiences. The Bacardi Global Brand Ambassador Survey shows the popularity of savory and herbaceous flavors and ingredients on trade, with interest growing by 20% and 15% respectively in North America in 2024. Interest in umami flavors is also trending, with miso, mushroom, fish sauce and sea vegetables on the rise.

Now, the focus is shifting from food and drink pairings to fully-fledged translations, where the line between food and drink becomes increasingly blurred. Take Double Chicken Please, ranked among the world's best bars, the New York spot offers imbibing takes on eatery classics.¹⁷ In classic menu

style, serves are split into appetizers, mains and desserts. The Red Gravy Eye cocktail features TEELING® Irish Whiskey, coffee butter corn, walnut, wild mushroom and coppa ham.

Innovators aren't just blurring the boundaries between food and drink but pushing them to extremes. This is the order at Funkytown in Bangkok, where cocktails are served a "funkiness" score for their complexity, and tangy, umami flavors reign supreme. Som Tum – made with BOMBAY SAPPHIRE® gin, fish sauce caramel, som tum cordial, honeyed wine and dried shrimp – comprises all the flavors of the Thai soup classic, while Chicken Dinner (available hot or cold) features chicken consommé, BACARDÍ® Carta Blanca rum, Riesling wine and scallion oil.



Gastro TECHNIQUES

Beyond flavor, experimental techniques are ensuring cocktail moments are ripe for reinvention. On-premise, bartenders are utilizing fat-washing, butter infusions and brining to bring extra depth and fatty complexity into clear spirits. Respondents in the Bacardi Global Brand Ambassador Survey noted increased interest in oils (30%), vinegars (26%) and brine (23%) in 2024, while chef-made butters and exciting blends have given the fat a renaissance on social media.

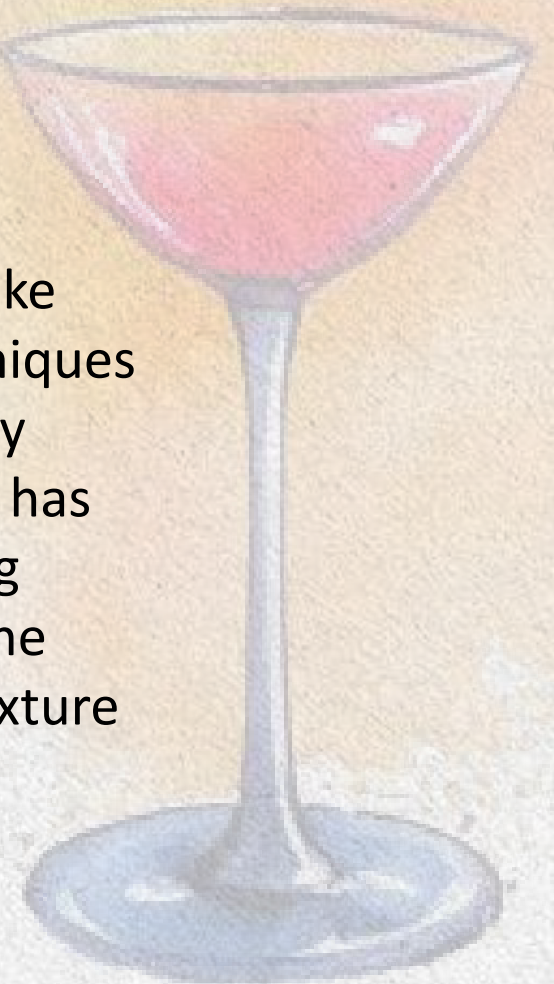
“WE INCREASINGLY SEE A CONVERGENCE BETWEEN FOOD AND DRINK, WITH SHARED TECHNIQUES AND INGREDIENTS INSPIRING SAVORY COCKTAILS. BARTENDERS HAVE ALWAYS LEARNED FROM CHEFS; NOW, RESTAURANTS MAKE COCKTAILS MORE CENTRAL TO DINING. AFTER ALL, YOUR FIRST ORDER IS FROM A COCKTAIL MENU – AND THAT DRINK CHOICE SETS THE TONE FOR THE MEAL AND THE WHOLE EXPERIENCE.”

JACOB BRIARS
GLOBAL TRADE ADVOCACY DIRECTOR
BACARDI



As consumers’ interest in culinary arts grows, expect further crossover with the world of food, as mixologists take inspiration and reconvert techniques from disciplines like gastronomy and pastry. Chicago bar Daisies has pioneered a vodka sour utilizing an olive oil syrup – stabilizing the ingredient to form a gomme texture suited to cocktail concoctions. The Manhattini – made with ANGEL’S ENVY® – is also gastro-inspired. The Low ABV serve combines the brand’s signature bourbon with an americano-style vermouth, verjus, atomized citrus salt and an olive oil finish.

Oil-infused and fat-washed spirits are now within reach for aspiring, at-home mixologists too, meeting the needs of around two fifths of respondents in Mexico (43%) and India (45%) who claim to be most looking forward to experimenting with cocktail making in 2025, according to the Bacardi Global Consumer Survey. Harnessing this spirit for exploration, craft cocktail company Camp collaborated with California olive oil company Corto to launch a do-it-yourself (DIY) kit for creating oil-infused spirits, streamlining the spirit-washing process and allowing experimental drinkers to satisfy their culinary and cocktail cravings.



TOP BARTENDER

Flavor Picks



#1 COFFEE/ESPRESSO



#2 SEASONAL



#3 SPICY

BACARDI GLOBAL BRAND AMBASSADOR SURVEY



Five: **THE FUTURE** *Spirit*

Innovators are pouring a fresh dose of optimism into their businesses, harnessing approaches that make accessing and enjoying the industry, better for all. The stage is being set for a buoyant future – where progress and purpose go hand in hand.

While transformative product innovation may be slowing, brands are taking steps to future-proof the drinks industry in line with next-gen consumers' values. Evolving their approaches to deliver a higher sense of purpose, in 2025 we can expect the drinks world to prioritize progress across the spectrum.



EQUAL Artisans

Men may have traditionally dominated the spirits industry, but innovators are striving to change the image of distillers. When it comes to dark, aged spirits, the challenge is two-fold, with women historically excluded as the makers – or even drinkers – of whisky, Scotch and Cognac.



The Modern Face of Whisky is striving for better. With a campaign to challenge the stereotypical image of whisky drinkers, the stock image library (created by OurWhisky Foundation) promotes the many faces of whisky enthusiasts. Challenging outdated stereotypes, a wealth of women and people of all genders, races and ages enjoying the spirit are featured in the collection.

Now, the industry is waking up to the talent of skilled artisans – recognizing the influence and continued dominance of female distillers and blenders. Bacardi is proud to have four female Maestros shaping the future of the industry and its drinks – Stephanie Macleod, Master Blender, DEWAR'S® Scotch whisky; Anne Brock, Master Distiller, BOMBAY SAPPHIRE® gin; Nancy Duarte, Master Blender, SANTA TERESA® rum; and Agathe Boinot, Cellar Master, D'USSÉ® Cognac, whose appointment made her the youngest female cellar master of the world's major Cognac houses.

In 2024, Macleod was named Master Blender of the Year by the International Whisky Competition® for a sensational sixth consecutive time, and is celebrated in the DEWAR'S® "Here's to the Story" marketing campaign, appearing in the advert as one of the inspiring storytellers and creative minds that has shaped the brand over the centuries.

“PERCEPTIONS ARE SHIFTING, AND NOW WOMEN CAN SEE THE POTENTIAL FOR A BRIGHT, EXCITING FUTURE CAREER WORKING WITH SPIRITS. I’M VERY PROUD TO PLAY MY PART IN THAT BY NURTURING FUTURE FEMALE TALENT IN MY TEAM.”

STEPHANIE MACLEOD, MASTER BLENDER
DEWAR'S® SCOTCH WHISKY

Beyond championing established artisans, Bacardi is also building bridges for access. In 2025, the brand will host two all-female cohorts of its pioneering “Shake Your Future” program in India. The training is designed to help unemployed and underrepresented young adults build careers in the world of mixology. Classes help master bartending basics, covering subjects like mixology, flaring as well as complementary business areas such as personal branding, social media and communication.

The visibility of women at the top of drinks world is empowering the cohort industry-wide. Today, over three quarters (76%) of women working in the beverage alcohol industry feel they can be their authentic selves at work and would encourage other women to pursue a career in the sector, according to research from Deloitte.¹⁸



Distilling SUSTAINABILITY

As discerning consumers get wise to greenwashing practices, they're looking to the industry to get pragmatic with sustainable progress. Beyond large-scale gimmicks and one-time activations, their focus is on incremental changes that they – and brands – can put into action.

The Bacardi Global Consumer Survey highlights this practically. In France and Germany, respondents ranked buying local and reducing single-use packaging as the environmental considerations most important when choosing spirits and liquor,

while around one quarter of consumers in Mexico (29%) and Spain (24%) would pay more for a cocktail made with locally sourced ingredients.

The topic remains key inside the industry too, where over three quarters of respondents (79%) in the Bacardi Global Brand Ambassador Survey list sustainability as a key concern – also listing supporting local businesses (69%) and eliminating single-use plastic (68%) as their top priorities for 2025.

Setting this future in motion, Bacardi has completed the world's first commercial production of a glass spirits bottle fueled by hydrogen. The brand worked with premium glassmaker, Hrastnik1860®, to pioneer new technology that powered a glass furnace with hydrogen as its primary energy source and in doing so cut the greenhouse gas (GHG) emissions typically produced as a byproduct of glass bottle production. The bottle, which for the purposes of the trial was the iconic ST-GERMAIN® elderflower liqueur bottle, is identical in appearance to the bottle produced using traditional methods.

Innovative processing methods are also meeting consumers' demand for high-quality, low intervention serves. People continue to care about the ingredients and what goes into their spirits, with 61% of consumers globally saying they would choose additive-free spirits over the alternative. The appeal is even higher in countries like India (77%), Italy (75%) and Spain (72%), according to the Bacardi Global Consumer Survey.

TOP SUSTAINABILITY *Themes*



38%

REDUCING
SINGLE-USE
PLASTIC



36%

RECYCLABLE
PACKAGING



33%

BUYING
LOCAL



32%

HELPING PRESERVE
CLEAN WATER



28%

SUSTAINABLY
SOURCED
INGREDIENTS

BACARDI GLOBAL CONSUMER SURVEY

COMMUNITY *Empowerment*



With the size and scale of next-gen fandoms introducing drinks brands to all-new audiences, the industry has a unique opportunity to occupy a more meaningful and perennial position in consumers' lives. But, if authentic collaborations and transformed drinking moments convert audiences into 24/7 fans – seeking brands for culture, not just cocktails – it won't be long before individuals themselves seek a civic stance from the industry.

Put plainly, with cohorts drinking less – and more mindfully – it's up to brands to represent more to consumers than an occasion to celebrate, and instead represent a force for making the industry better. For younger cohorts particularly, commitment to uplifting communities will prove key. Already, Dazed Media reveals that respondents picking community in how they define themselves has risen by 43% since 2020.¹⁹

Innovators are showing this community drive in action, occupying a key role in network-building and education. Tales of the Cocktail Foundation (TOTC) is a prime example – supporting organizations that are

actively improving the hospitality landscape from the inside out. In September 2024, the foundation's Philanthropy and Development committee awarded a total of \$75,000 to various organizations committed to supporting bartender welfare and wellbeing.

The Bacardi Global Brand Ambassador Survey reveals the importance of this industry motivation. Almost two thirds (62%) of respondents globally said they would like more professional networking in 2025, including the opportunity to build community and connections, while over half (55%) noted the importance of professional development for the year ahead.

TOTC award recipient, Another Round, Another Rally, is making strides to set this future in motion – providing vital financial and educational resources for the hospitality industry. The non-profit's mentorship program, Skylight, offers reimbursement grants and immersive education scholarships to historically underserved voices and talent, recently expanding to include a Spanish-speaking version for members of the community.

CONCLUSION

In 2025, we can expect cocktails to act as a conduit for connection – bringing people closer to new interests, new knowledge, new experiences – and most importantly, each other.

The intent is clear: cocktail experiences in 2025 are set to be enjoyed alongside the people, experiences and emotions we value most. The Bacardi Global Consumer Survey reveals that across the world, almost two fifths (39%) of respondents are looking forward to celebrating moments that matter over cocktails with family and friends, while when it comes to drinking spirits, almost half (47%) would do this when relaxing with family and friends, 45% when on vacation, and one third when enjoying a date night with a partner.

With uncharted social waters persisting, the mood for making those celebratory and convivial moments matter has never been clearer, with spirits brands seizing the opportunity to take on a more empowering and meaningful role in consumers' lives.



Citations

CLICK ON EACH LINK TO ACCESS THE SOURCE

1

“GLOBAL BEVERAGE ALCOHOL MARKET SET FOR RECOVERY”, IWSR, 2024

2

“SECOND QUARTER 2024 RESULTS” LIVE NATION ENTERTAINMENT, 2024

3

“GLOBAL SPORTS HOSPITALITY MARKET”, RESEARCH AND MARKETS, 2022

4

“THE EVENT EFFECT: GEN Z RETAIL SURVEY” MERGE, 2024

5

“TAYLOR SWIFT DRAWS LUXURY US TRAVELLERS”, BLOOMBERG, 2024

6

“THE ERA’S SPENDING TOUR REPORT”, VOUCHERCODES, 2024

7

“SUPERBOWL LVIII DRAWS LARGEST TV AUDIENCE ON RECORD”, NIELSEN, 2024

8

“MONEYTALKS: ALL THE \$\$\$ GENERATED BY SUPER BOWL 2024”, BAKERY & SNACKS, 2024

9

“HOW THE GREY GOOSE HONEY DEUCE BECAME THE BIGGEST COCKTAIL IN SPORTS”, CHEDDAR, 2024

10

“HONEY DEUCE US OPEN SALES”, THE SPIRITS BUSINESS, 2024

11

“CTRL SHIFT: THE FUTURE OF YOUTH CULTURE”, DAZED MEDIA, 2023

12

“THE FOUR-WAY WIN OF BARTENDER INVESTMENT”, CGA, 2024

13

“MASTER THE MEXICAN CLASSICS”, PUNCH DRINK, 2024

14

“THE FUTURE 100: 2024”, VML INTELLIGENCE, 2024

15

“STATE OF SNACKING”, MONDELÉZ, 2023

16

“CONSUMERWISE SURVEY”, MCKINSEY, 2024

17

“WORLD’S 50 BEST BARS”, WILLIAM REED, 2023

18

“WOMEN RAISING THE BAR”, DELOITTE, 2023

19

“CTRLSHIFT: THE FUTURE OF YOUTH CULTURE”, DAZED MEDIA, 2023

2025

BACARDI

Cocktail Trends

REPORT

PRESENTED BY BACARDI LIMITED
IN ASSOCIATION WITH THE FUTURE LABORATORY



WWW.BACARDILIMITED.COM

©2024 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