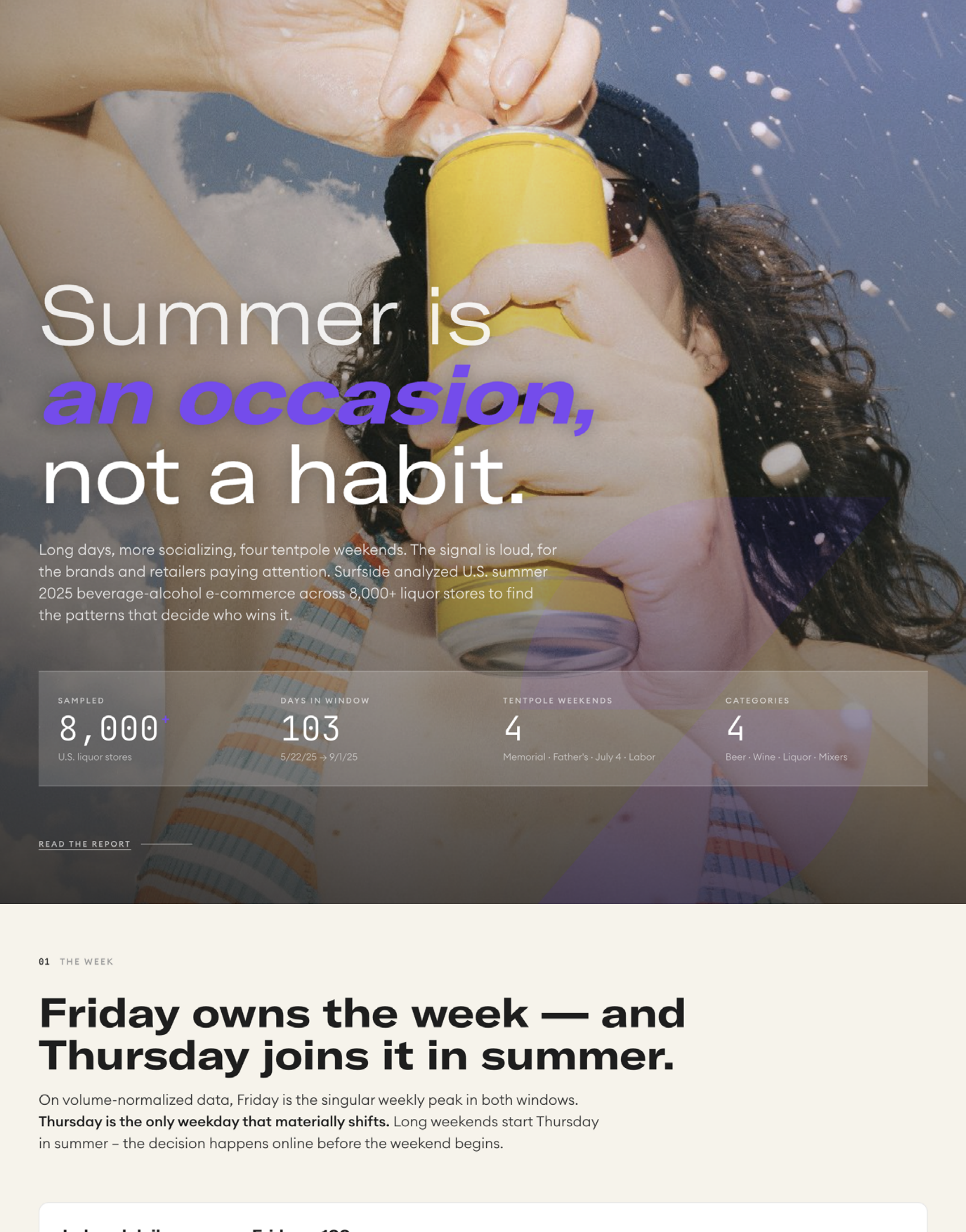




Summer is *an occasion,* not a habit.

Long days, more socializing, four tentpole weekends. The signal is loud, for the brands and retailers paying attention. Surfside analyzed U.S. summer 2025 beverage-alcohol e-commerce across 8,000+ liquor stores to find the patterns that decide who wins it.

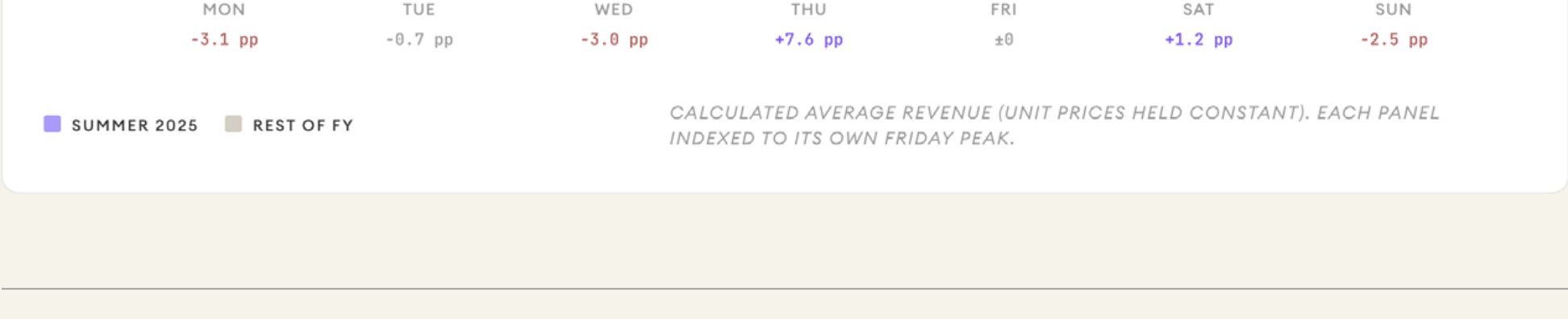


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01 THE WEEK

Friday owns the week — and Thursday joins it in summer.

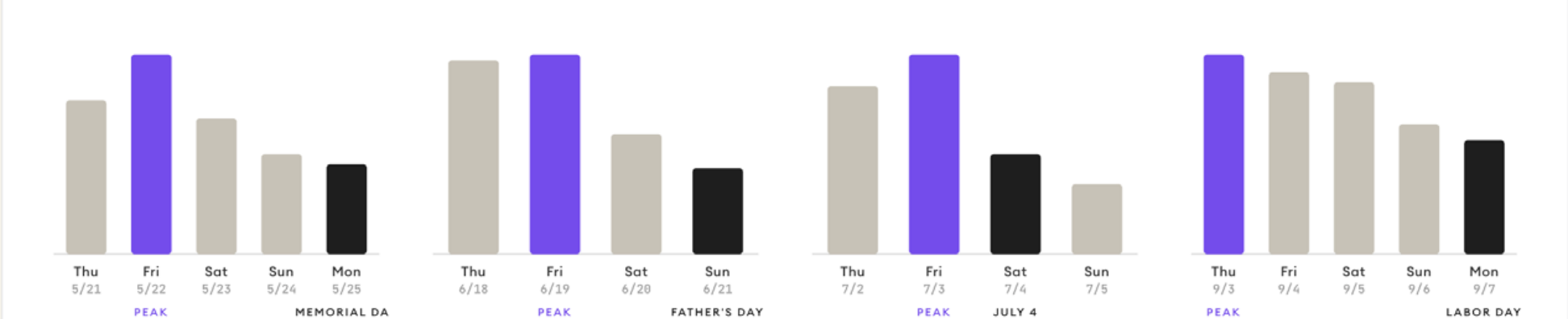
On volume-normalized data, Friday is the singular weekly peak in both windows. **Thursday is the only weekday that materially shifts.** Long weekends start Thursday in summer — the decision happens online before the weekend begins.



02 THE LEAD-UP

The holiday day is the floor, not the peak.

Inside every summer holiday window, the peak lands 1-2 days before the holiday itself. The named holiday is the lowest-revenue day of its own window in three of four cases. The plan-ahead shopper isn't waiting for the date.

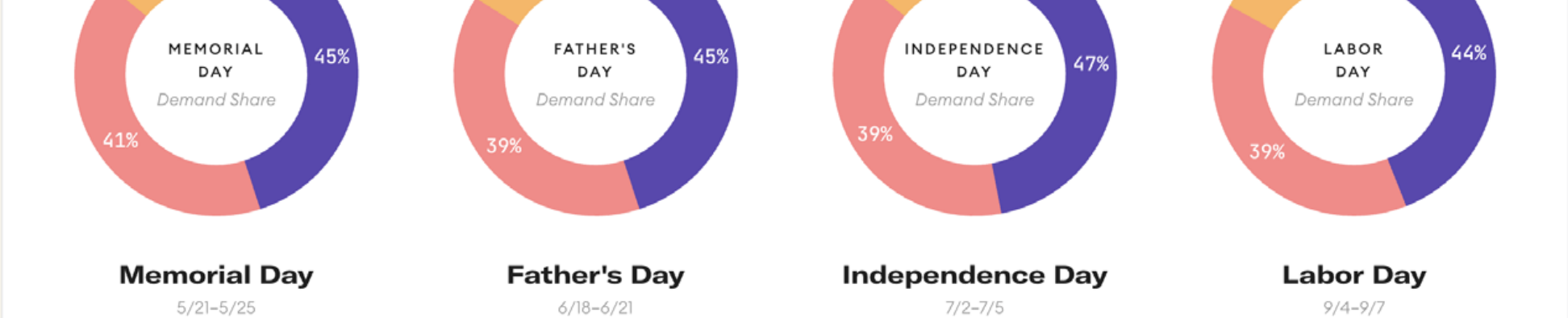


Each panel indexed to its own peak day = 100. DAY-OF-WEEK LIFTS CARRIED FROM THE 2025 SUMMER PANEL AND PROJECTED ONTO THE 2026 CALENDAR; HEIGHTS SHOW RELATIVE DAILY REVENUE INSIDE THE WINDOW ONLY — NOT CROSS-HOLIDAY MAGNITUDE.

03 THE HOLIDAYS

Each occasion has a category signature.

"Summer holiday" isn't one wave — it's four. Liquor and wine carry the dollars; beer carries the impulse. The category mix shifts holiday to holiday, and so should the plan.

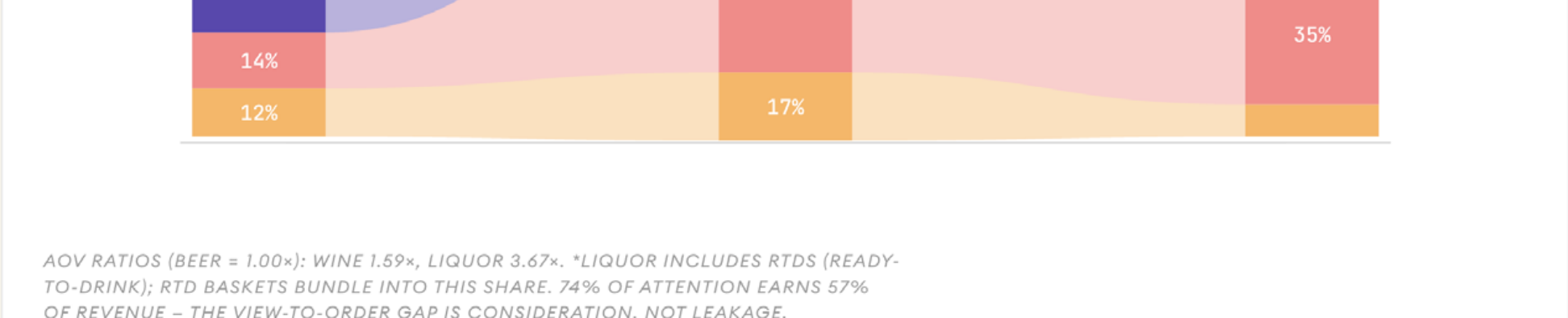
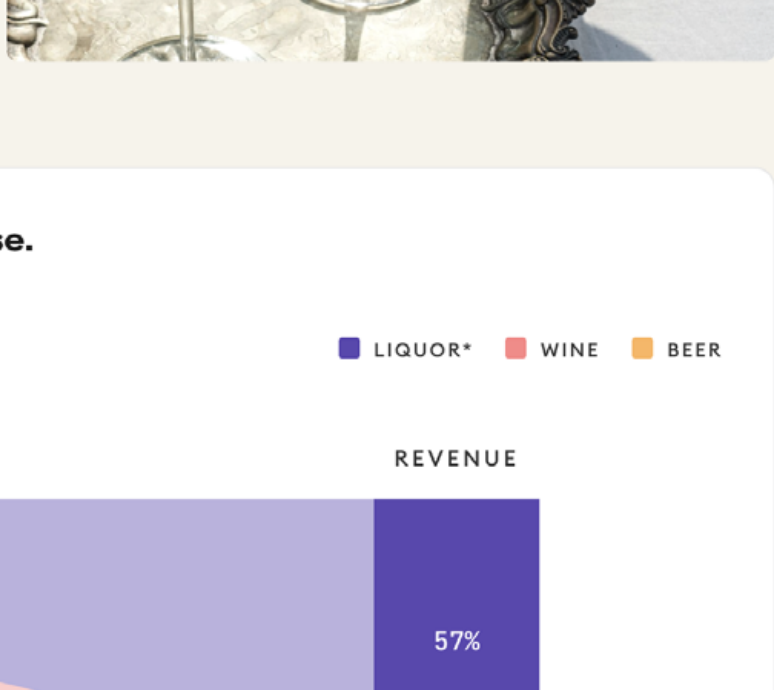


DEMAND SHARE = $\sqrt{(\text{REVENUE SHARE} \times \text{UNIT SHARE})}$, RENORMALIZED TO 100%. A CATEGORY EARNS SHARE BY MATTERING ON BOTH DIMENSIONS.

04 THE CATEGORIES

Three categories. Three different funnels.

Beer and wine shop like grocery — shoppers arrive knowing what they want. Liquor shops like consumer electronics — explore, compare, weigh. **74% of attention earns 57% of revenue.** The view-to-order gap is consideration, not leakage.



AOV RATIOS (BEER = 1.00x): WINE 1.59x, LIQUOR 3.67x. *LIQUOR INCLUDES RTDS (READY-TO-DRINK); RTD BASKETS BUNDLE INTO THIS SHARE. 74% OF ATTENTION EARNS 57% OF REVENUE — THE VIEW-TO-ORDER GAP IS CONSIDERATION, NOT LEAKAGE.



BEER IS THE IMPULSE. HIGHEST CART-ADD RATE OF THE THREE; THE VISIT CONVERTS BECAUSE THE DECISION WAS ALREADY MADE.

WINE CONVERTS. SHOPPERS ARRIVE KNOWING WHAT THEY WANT — EFFICIENT CART-ADD. EFFICIENT CHECKOUT.

89% OF LIQUOR SESSIONS DON'T ADD TO CART. THE ONES THAT DO CARRY AN AOV 4x BEER'S.

05 THE PLAYS

Four moves for the season.

For the brands marketing into beverage alcohol — and the retailers selling through it, Toggle the lens to see the move that applies to you.

