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BeerBoard: March Madness Delivers Draft Declines vs 2024, Increases vs St. Patrick's Day

Jessica Infante March 25, 2025 at 10:58 AM

March Madness did indeed extend March Sadness (readers of [Brewbound's weekend newsletter](#) will get the reference).

Draft volume during the opening weekend of the NCAA men's and women's basketball tournaments declined -5.8% compared to the same weekend in 2024, according to on-premise data firm BeerBoard, which reviewed nationwide sales during the March 20-23, 2025, weekend and compared to March 21-24, 2024.

During the weekend, on-premise revenue "experienced a slightly steeper drop" than draft volume, declining -6.6% year-over-year (YoY).

There may be one encouraging data point for brewers and sellers of draft beer: March Madness kickoff weekend beer sales topped St. Patrick's Day weekend (March 14-17). Draft volume increased +26.8% week-over-week (WoW), while packaged beer sales increased by an "eye-popping" +120%, BeerBoard noted.

However, the WoW comparisons weren't all good news across broader bev-alc. Spirits recorded "a significant drop" (-30.4%), which may indicate "a shift in consumer preference toward beer and beyond beer when compared to the St. Patrick's holiday weekend," BeerBoard wrote.

During March Madness Weekend 1, top-seller non-craft domestic beer accounted for 47.6% of all draft volume, and increased volume +0.9% YoY. No. 2 craft accounted for 35.3% of all draft volume, but declined by -3.6%. No. 3 imports increased volume +4.87%, and accounted for 16% of all draft.

Beyond beer offerings have begun to carve out a draft position at 1.1% share. The segment "exhibited significant growth of +21.5% YoY," BeerBoard wrote.

Light lagers were the lead style on draft and increased volume +2.1%, followed by:

- No. 2 Lager, +1% in volume;
- No. 3 IPA, -9.8% in volume;
- No. 4 European ales, -2.3% in volume;
- No. 5 Belgian witbier/white ales, -13.4% in volume

Anheuser-Busch InBev's (A-B) Michelob Ultra was the top-selling brand on draft, accounting for 13.9% of volume. Michelob Ultra increased volume +8.9% YoY. No. 2 Molson Coors' Coors Light (11.2% volume share) increased volume +2.1% YoY, while volume of No. 3 sibling brand Miller Lite (10.5% volume share) declined -1.5% YoY.

No. 4 Constellation Brands' Modelo Especial "continued its upward trajectory," increasing volume +10.2% YoY, accounting for 6.8% of total draft volume.

Nearing the second anniversary of the conservative-led boycotts that led to its catastrophic loss of share, A-B's Bud Light was the fifth best-selling draft brand, accounting for 6.4% of total draft beer volume. Its volume declined -7.6% YoY.

Packaged beer category offerings also recorded declines in volume (-12.6%) and revenue (-7.8%) YoY in the on-premise, BeerBoard noted.

"Beyond beer products saw significant growth, making up 11.2% of the volume share with a +14.4% YoY jump," BeerBoard wrote. "Also notable was craft beer, representing 8.6% of the volume share, with an increase of +4.8% YoY."

Domestic beer accounted for nearly half (48%) of sales volume for all packaged goods, marking a +2.2% volume increase YoY. Packaged volume of imports declined -8% YoY, but the segment accounted for nearly one-third (32.2%) of all packaged volume.

Ready-to-drink (RTD) canned cocktails recorded a +45.6% volume increase, and raised share to 6.6% of packaged volume. Non-alcoholic beverages accounted for 5.6% of packaged goods volume, and increased volume +22.8% YoY. Hard seltzers' volume declined -12.7% YoY, and the challenged segment accounted for 4.5% of packaged volume.

As it was on draft, Michelob Ultra was the best-selling brand in package, accounting for 13.1% of volume (+1.5% YoY), followed by:

- No. 2 Constellation's Corona Extra (12.4% share, -14.5% in volume YoY);
- No. 3 Miller Lite (10.7% share, -1.5% in volume YoY);
- No. 4 Coors Light (8.4% share, -1.1% in volume YoY);
- No. 5 Bud Light (6.2% share, -1.3% in volume YoY).

In the spirits category, whiskey (+12.2%) and tequila (+11.3%) recorded double-digit volume growth YoY. Vodka volume increased "a modest" +3.9% YoY.

Whiskey held the largest share of volume (31.4%), followed by tequila (20.5%) and vodka (16.5%).

The tournament resumes on Thursday with the Sweet 16 (March 27-28) and Elite Eight (March 29-30) rounds. The Final Four is scheduled for April 5, followed by the championship game on April 7.