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BeerBoard: St. Patrick's Day Draft Volume -12.7% Nationwide

Jessica Infante March 20, 2025 at 5:15 PM

St. Patrick's Day weekend wasn't necessarily lucky for purveyors of draft beer, according to on-premise data firm BeerBoard, which published its annual recap of bev-alc performance at bars and restaurants during the holiday.

"On what is traditionally one of the biggest party weekends of the year, draft volume was down -12.7% when compared to the same period in 2024," BeerBoard wrote.

"Correspondingly, revenue saw a decline of -12.6% over the weekend. This is coming off a -20% decrease for the holiday weekend in 2024 (when compared to 2023)."

This year, March 17 fell on a Monday, so BeerBoard examined on-premise sales for the four-day period starting Friday, March 14. The firm compared data between those four days and Thursday, March 14, and Sunday, March 17, in 2024.

2025's draft volume decline marks a deceleration from 2024, when draft volume fell -20% YoY. However, in 2023, St. Patrick's Day fell on a Friday and coincided with the opening weekend of the NCAA college basketball tournament. The alignment led to a +20.8% increase in draft volume, so if 2024 represented a return to the norm, 2025 may indicate a broader decline.

Nationwide, light lager was the No. 1 style on draft, accounting for 44.1% of all draft volume. However, at -0.2% YoY, it was roughly flat. No. 2 lager increased volume +1.8% YoY and accounted for 21.1% of total draft volume. No. 3 IPA (7.31% volume share) declined -5.9% YoY.

During the holiday weekend, stouts/porters rose to the No. 7 draft style, up from their usual No. 10, bolstered by Diageo-owned Guinness.

"Guinness Draught ranked as the No. 13 brand, but during the St. Patrick's Day weekend it climbed to the No. 9 position," BeerBoard wrote.

During the long holiday weekend, Guinness more than doubled its volume share, increasing to 3.12% from 1.44% year-to-date.

“Bars poured an average of 122% more Guinness pints for these four days than the daily average for the 30 days before,” BeerBoard noted.

Revisit this episode of the [Brewbound Podcast](#) featuring Guinness national ambassador Ryan Wagner for more information about how the brand prepares for its busiest time of year.

At the brand level, Anheuser-Busch InBev’s Michelob Ultra was the No. 1 beer on draft and increased volume +7.3% year-over-year (YoY). Volume of Molson Coors’ No. 2 Miller Lite declined by a “nominal” -2.2%, and No. 3 Coors Light’s volume declined -3%.

In key cities with major St. Patrick’s Day celebrations, draft volume was down across the board, with New York City posting the steepest decline at -11.8%, followed by Boston (-7.8%) and Chicago (-3.4%). New York City’s top draft brand was Guinness, which had “explosive growth” at +112.4% YoY. Bud Light was No. 1 in Boston but declined -19.4% YoY. Chicago’s top beer was Miller Lite, which posted +4.2% volume growth.

In BeerBoard’s home town of Syracuse, New York, Guinness “shockingly” fell out of the No. 1 draft spot and was supplanted by Miller Lite, which increased volume +14.4% YoY for the weekend. Guinness was the second most poured beer and increased volume +0.7% YoY, followed by FIFCO USA’s Labatt Blue at No. 3, which declined -11.5% YoY.

Among packaged products, light lager (No. 1, 40.2% of volume) and lager (No. 2, 35% of volume) accounted for 75.2% of volume during the holiday weekend. Both recorded volume declines YoY, with light lagers down -2.9% and lagers down -6.8%.

The remaining three segments in the top five in package all recorded YoY volume growth:

- No. 3 non-alcoholic beer, 6.4% share, +113.2% in volume YoY;
- No. 4 hard seltzer, 5.2% share, +7.5% in volume YoY;
- No. 5 ready-to-drink cocktails, 4.2% share, +68.7% in volume YoY.

The top five brands in package were all traditional beers:

- No. 1 Constellation Brands’ Corona Extra, 15.5% share, -7.8% in volume YoY;
- No. 2 Michelob Ultra, 14.6% share, +5.8% in volume YoY;
- No. 3 Miller Lite, 11% share, +3.8% in volume YoY;
- No. 4 Constellation’s Modelo Especial, 8.7% share, +42.6% in volume YoY;
- No. 5 Coors Light, 7.8% share, -4.9% in volume YoY.

Bourbon/whiskey was the top spirit by style with 26% share (-4.6% in volume YoY), followed by tequila/mezcal (17.1% share, +15.2% in volume YoY), and vodka (17.1% share, -5.8% in volume YoY).

Despite its style not being the largest in volume, Tito’s Vodka was the No. 1 spirits brand across all styles, with an 8.1% share of volume (-4.6% YoY), followed by No. 2 Jameson Irish Whiskey (5.7% share, -16.3% in volume YoY) and No. 3 Patron Silver (3.9% share, -11.8% in volume YoY).