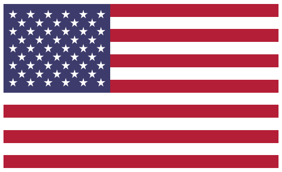
Quality on Tap: How Draft Drives Occasions and Spend



Exclusive insights into key draft beer trends, consumers' latest preferences and emerging opportunities

Draftline Technologies™
and NIQ Draft Beer Report

Draftline Technologies NIQ

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Welcome to the 2026 Draft Beer Report. It features insights from the experts at Draftline Technologies and NIQ to help you understand the top trends at play in the beer market and identify new opportunities to increase your sales.

We are in a period of great potential for draft. NIQ's research makes clear that this is a market with major momentum and plenty of headroom to grow further. For beer consumers, draft delivers great experiences and value, and it's where they find their new favorite brands. For outlets it generates excellent value, velocity and profitability, with far superior returns than from packaged products alone.

Our report sets out the big draft dynamics from 2025 and where the market is heading next. It also has authoritative analysis of the demographics of draft beer drinkers, and pointers for what they want, as well as where and when they want it. We also take a close look at several of the hot topics in beer at the moment, like the rise of non-alcoholic options and the importance of sustainability, and share Draftline's top tips for improving the operational and commercial performance of your taps.

The On Premise is a competitive and turbulent market, but we believe draft beer has a very exciting future. We hope you find our analysis useful and would love to hear your views.

About our report

Data in this report is drawn from three key research tools from NIQ, powered by CGA intelligence.

On Premise Measurement (OPM) and **BeverageTrak**, the definitive sources of drinks sales data in the US On Premise.

TD Linx, the authoritative database of bar, restaurant and other licensed outlets in the US.

On Premise User Survey (OPUS), a regular survey of 30,000 nationally representative On Premise consumers.

To learn more about these and other research solutions from NIQ, visit **www.nielseniq.com**.

Executive Summary: Nine top takeaways

1. Draft sales have powerful momentum
NIQ's On Premise Measurement service, the measure of sales in licensed premises across the traditional On Premise channel in the US, shows that draft now earns 53.1% of all beer sales by volume—an increase of 2 percentage points in just two years. On current patterns, draft beer will very soon earn more dollars for the average outlet than packaged, despite far lower availability.

2. Draft wins every time on velocity
When venues across the Total Key States stock both draft and packaged beer, draft delivers nearly double the average value velocity. That gap is even larger in top segments like craft and premium beer, and it's in play across all price points.

3. Imports are powering growth
Sales of draft import beer have jumped by more than a fifth in two years as drinkers look beyond the US for new tastes and more venues stock it. While packaged imports generate more revenue for now, draft is closing the gap fast.

4. Drinkers of draft spend more
Draft beer drinkers are a significantly more attractive audience than packaged buyers in commercial terms. They spend an average of $45 more per month in outlets and have a household income that's $23,000 higher.

5. Demographics are diversifying—but there's more to do
Draft's appeal is broadening—especially among female drinkers. But younger adults and non-white groups significantly under-index for consumption and more work is needed to attract them to draft.

6. Drinkers love the taste, freshness and value of draft
Consumer research highlights the better taste and greater freshness as the top two reasons drinkers choose draft over packaged. Better value for money and more attractive presentation also score high.

7. NOLO is set to grow
As consumers moderate alcohol intake, major opportunities are emerging in no and low alternatives in draft beer. Their share of the category nearly doubled in 2025, and young adults are particularly engaged.

8. Quality equals revenue
In NOLO as in all draft categories, it's essential for retailers and suppliers to ensure consistently good delivery. Scrupulous hygiene, tight controls and rigorous staff training will ensure buyers keep coming back to draft.

9. Draft is the sustainable choice
Draft has one more big advantage over packaged: its sustainability. As well as delivering better yields, kegs have far less waste and transport miles than bottles or cans.

Draft Market Snapshot

Draft beer continues to make gains against packaged alternatives and is helping the category to sustain sales in a challenging trades environment.

Those are among the top insights from NIQ's latest analysis of the beer market across the US. The On Premise Measurement service, which tracks sales in licensed premises across the mainland US, reveals draft generated **53.1%** of all beer sales by volume in 2025. This represents a year-on-year share gain of **0.9** percentage points from packaged products, following an exact-same gain in 2024.

Draft's share by value was slightly smaller at **49.9%**, reflecting lower price points. However, this also represents a second successive year-on-year gain of **0.9** percentage points. Based on the current trajectory, draft beer will very soon be earning more dollars for the average outlet than packaged alternatives, despite being available in far fewer outlets. It's clear that the strongest momentum in the beer category at the moment belongs to draft.

Draft's performance was vital in protecting On Premise beer sales in 2025. With many consumers' spending limited and their habits changing, the beer category as whole is under pressure, but draft is proving more resilient. While the Rate of Sale on packaged beer dropped by **5.4%** in 2025, draft fell much more slowly at **1.7%**.

Challenges for beer are the result of distribution issues as well as spend. NIQ's TDLinx solution shows the US had **301,942** outlets selling beer as of December 2025—**0.5%** fewer than a year previously. Market segments including casual dining (down **0.9%**), fine dining (down **7.0%**) and nightclubs (down **2.9%**) all contracted year-on-year. However, other segments that commonly offer draft beer, including neighborhood bars (up **0.2%**) and sports bars (up **4.6%**), were in growth.

Distribution setbacks and the arrival of new brands means competition for taps has intensified. Strengthening outlet distribution will be a top priority for brands in 2026. Nevertheless, the draft market remains full of opportunities, and as our report makes clear, there are many ways for suppliers and operators to secure growth.

Five key numbers

53.1%
Draft's share of total On Premise beer volumes in 2025

+0.9%
Percentage point increase in draft's share of volumes from 2024

-1.7%
Change in draft's RoS year-on-year

301,942
Total US outlets selling beer at December 2025

-0.5%
Decline in outlets selling beer in 2025

Double Your Money: Why Draft Earns More

NIQ's sales analysis is conclusive: draft beer generates substantially more earnings for outlets than packaged alternatives.

The BeverageTrak solution reveals that when both formats are stocked in US licensed premises, draft delivers an average value velocity of **$5,759**. This is nearly double the average of **$2,948** from packaged.

The gap is even wider in beer segments like craft, where draft's value velocity of **$3,075** is more than four times higher than the average of **$748** for packaged. The differential is threefold in domestic super-premium, with averages of **$3,687** in draft and **$1,240** for packaged. It's smaller, but still apparent, in the domestic premium category (**$2,023** for draft v **$1,832** for packaged).

The contrast applies across the pricing ladder as well. Draft generates comfortably higher value velocity in the low, mid and high price bands, and it's particularly far ahead in the premium end of the craft market, where draft powers value velocity of **$8,522**, while packaged products manage only **$983**.

Draft and packaged beers enjoy a mutually beneficial interplay, and each format excels in different segments of the category. But on balance, it's very clear that draft provides the more lucrative opportunity for most outlets.

Draft Segments and The Rise of Imports

Draft beer gained share from packaged alternatives in most segments in 2025, but it's imports that are powering the strongest growth.

Total sales by value of imported beer on draft jumped by **8.1%** last year, building on growth of **13.7%** in 2024, while packaged imports fell **6.8%**. After a swing of **3.5** percentage points from packaged to draft in just 12 months, draft now attracts **38.6** cents in every dollar spent on imported beer. While this growth is led by an overall preference for draft, increased availability for key import brands in the draft format was also a contributing factor.

While packaged still retains the majority share, the gap is closing fast. What's more, draft is taking share at pace in other segments. For example, the super-premium segment achieved **4.8%** growth in draft sales by value in 2025, but packaged products dropped **1.4%**. In the below-premium segment, packaged sales slipped **1.3%** but draft sales rose **3.3%**.
The contrast in fortunes is also apparent in craft beer. Draft craft stole **0.2** percentage points of share from packaged in 2025, and it now accounts for **79.6%** of the category's total sales.

The breakdown of beer sales is constantly evolving, and it's vital to track the latest changes in guests' preferences. But it's clear that two major trends are in play at the moment. First, imports are soaring in popularity, thanks to increased availability on draft and more consumers looking beyond the US for new and different beers. And second, more and more drinkers are recognising the superior quality of draft over packaged, regardless of the type of beer they choose.

The Demographics of Draft

NIQ's consumer data shows draft beer drinkers are a more lucrative cohort than those who prefer packaged.

According to the On Premise User Survey in late 2025, draft beer drinkers spend an average of **$217** per month in US outlets, which is **$45** more than their packaged counterparts. Their average household income is substantially higher too: **$113,900** compared to **$90,400**.

While draft's consumers skew towards older, white men, there are signs that it is diversifying its appeal. Nearly two thirds (**64%**) of draft drinkers are male, and the vast majority are white (see box). However, the proportion of female drinkers has increased by 3 percentage points year-on-year, which is an encouraging sign that efforts by outlets and brands to broaden the attraction of draft are working.

However, other demographics remain under-served by draft. For example, Hispanic and Black consumers make up only **13%** of draft consumers, which is a notably lower share than the figure of **23%** in packaged beer.

The draft market also remains dominated by older consumers. Two in five (**40%**) draft drinkers are from the Baby Boomer generation of 59 to 77 year-olds, who are more than twice as likely to choose draft than they are to buy packaged beer. In sharp contrast, just **5%** of draft drinkers are in the Gen Z group of 21 to 26 year-olds. This is far short of the packaged market, where Gen Z makes up **12%** of the total.

It's apparent that both younger and non-white consumers are significantly under-indexing for draft beer. These are large and lucrative targets for outlets and suppliers and finding new ways to appeal to them is vital to the long-term future of draft. As our report shows, there are various options to diversify the base and transition drinkers of packaged beer towards taps, but the surest path is to provide them with consistently good draft experiences.

Key Draft Demographics

Gender

Male	Female
64%	36%

Age

Gen Z	5%
Millennial	21%
Gen X	30%
Boomer	40%

Ethnicity

White	86%
Hispanic	8%
Black	5%
Asian	4%

$217
Average monthly On Premise spend

$113,900
Average household income

29%
Drink out weekly

70%
Eat out weekly

$8.94
Average price willing to pay for a 16oz glass of draft craft beer

Decisions At The Tap: Five Reasons Beer Drinkers Choose Draft

1. Better Taste
The superior taste is the number one attraction for those who choose draft. Three in five (**59%**) of them—and **42%** of all beer drinkers—cite it as a factor in their selection. Once they try draft, drinkers are usually converts, but consistency is essential. High quality serves will keep people coming back, but poor experiences risk losing them to packaged beers or, worse for retailers, other locations.

2. Greater Freshness
The extra freshness of draft over bottles is a factor for **42%** of draft consumers. This highlights the value of explaining to guests why draft beer has spent less time between the brewery and bar than bottles, which may be standing in the fridges for months at a time. When drinkers understand how fresh draft beer can be, they are often much more disposed to buy it.

3. Glass Serves
The importance of draft serves shouldn't be underestimated. Two in five (**41%**) say the opportunity to drink from a glass rather than a bottle or can is a factor in their decision to buy draft. Outlets and brands need to make quality glassware a core element of the tap experience.

4. Good Value
Value for money is a choice factor for **23%** of draft beer consumers. When spending is under pressure, many drinkers appreciate that they can get higher volume-per-dollar than they do with bottles or cans. Value is particularly important for Millennials and Boomers, who are both 7 percentage points more likely than average to cite it as a factor.

5. Favorite Venues
Good draft delivery gives outlets a major competitive advantage in beer. More than a fifth (**22%**) of draft consumers say the quality of serve in their favorite bar or club is a factor in their decision to choose it over packaged products. Building a reputation as a reliable provider of tap beer should be an operational priority for all bars.

Why Beer Drinkers Choose Imports

Imported beer is among the fastest growing beer segments at the moment. But why are drinkers attracted to it? NIQ's data shows branding and value are the two most important factors.

1. 46% The quality of brands available
2. 39% The availability of a favorite brand
3. 34% Happy hours
4. 31% Price
5. 26% The type of venue

Draft: A Beer For Every Occasion

From everyday casual drinks to celebrations, draft beer serves a wider variety of occasions than is sometimes realized.

The most common consumption moments include catch-ups and sports. Well over half (**55%**) of draft beer consumers cite catch-ups with friends as a time to enjoy it—notably higher than the figure of **47%** among packaged beer drinkers. Draft consumers are also 11 percentage points more likely than packaged ones to choose beer for sporting events.

Beyond those core occasions, draft has high penetration for drink-led occasions like wind-down opportunities and after-work drinks. But some of the biggest opportunities for taps lie on the food-led side of On Premise visitation. Well over half of draft consumers cite meals with friends (**62%**) or family (**54%**) as occasions for choosing beer, and in both cases they are more likely to do so than those who typically buy bottles or cans.

Further opportunities lie in celebratory occasions like birthdays and weddings. Public holidays and national events have potential too. For example, more than a third (**35%**) of US consumers say they eat or drink out on New Year's Eve, while nearly as many do so for Thanksgiving (**30%**) or the NFL Superbowl or PlayOffs (**28%**). Mother's Day (**22%**), Valentine's Day (**21%**), St Patrick's Day (**19%**), Independence Day (**19%**) and Father's Day (**19%**) are five more important dates in the calendar. A significant number of consumers will seek draft beer on these occasions, and event-related discounts, promotions or entertainment can all help to secure their spend.

Daypart Dynamics

Understanding the times of day when consumers choose draft is crucial. NIQ's OPUS service highlights early evenings as the most important daypart, with **71%** of draft beer consumers going out for drinks between 5pm and 8pm. Visitation drops off in the late-evening (**24%**) and late-night (**6%**) slots, which is partly a consequence of the trend for consumers going out to eat and drink earlier than they previously did.

This has opened up potential for beer sales in dayparts that were previously less valuable. With **19%** and **15%** of draft beer drinkers now visiting the On Premise in the mid-afternoon and lunchtime periods respectively, draft's window is widening.

Meanwhile, Happy Hours remain a core motivator of purchases, with nearly half (**46%**) of draft consumers visiting for them. This is significantly more than the **34%** of packaged beer drinkers who do so (**34%**)—another sign of draft's growing popularity.

Non-Alcoholic Beer On Draft: Do It Right

With some US consumers moderating their beer intake, new opportunities in no and low alcohol alternatives are increasing—and that brings fresh potential on draft.

For now, the non-alcoholic segment is a small part of the beer market, with just **1.0%** of all category sales by value in 2025. However, this share nearly doubled from **0.6%** in 2024, and as alcohol-free options become better known, more growth is certain to follow in 2026.

The non-alcoholic market is largely dominated by bottles and cans, with draft generating just **1.7%** of the segment's sales in 2025. But again, this figure is likely to rise as outlets realize the potential of draft in the fledgling market and perfect the science of serves (see box).

The demographics of alcohol-free consumers make this a particularly attractive opportunity. It is a relatively affluent cohort that spends an average of $242 per month in the On Premise—$25 more than the average of $217 among all draft consumers. It's a notably diverse base as well: **29%** of non-alcoholic drinks consumers are non-white, compared to only **17%** of draft beer consumers. Another key consideration is that this audience is highly motivated by quality and is ready to spend freely if standards are high.

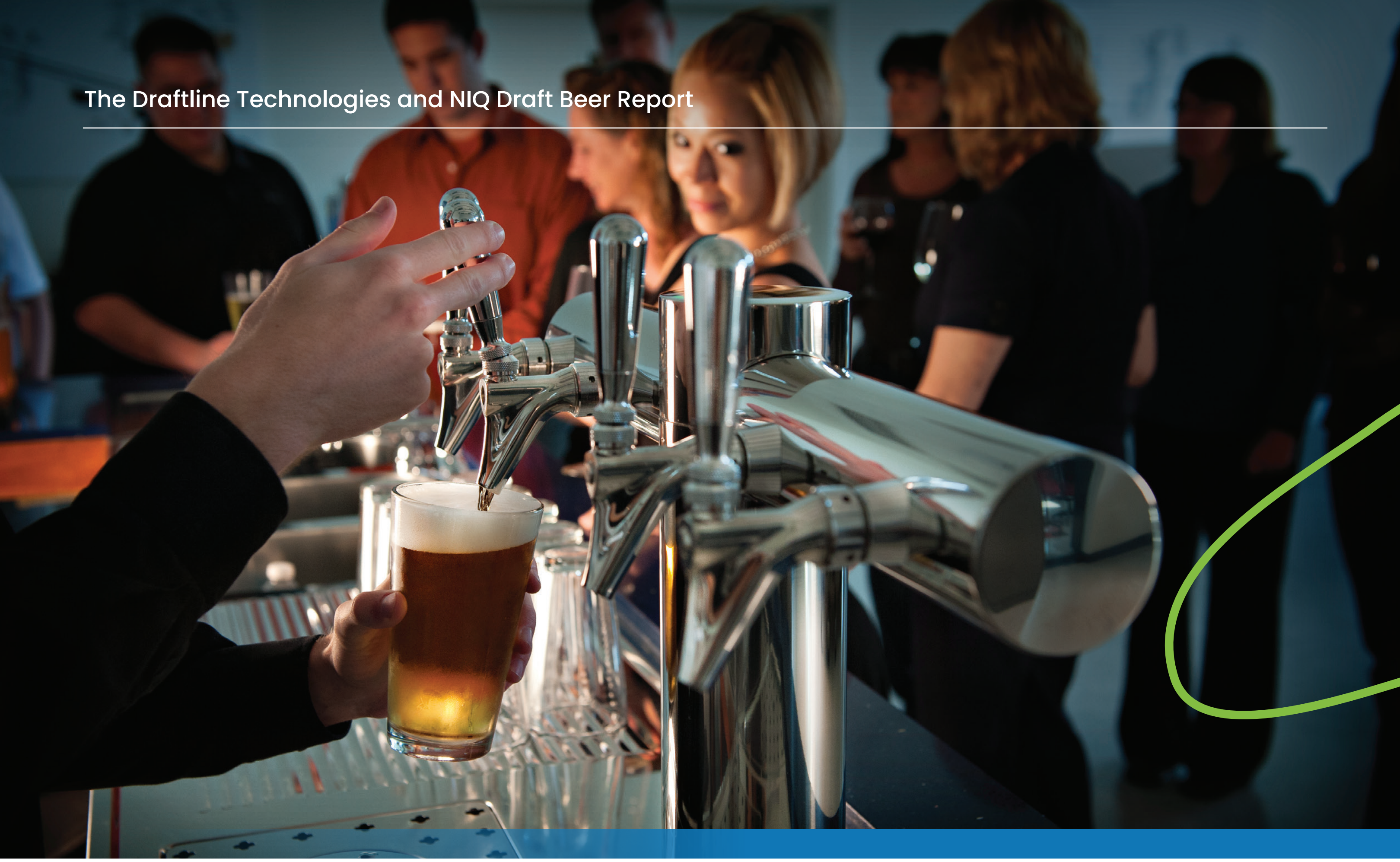
Perhaps most importantly, alcohol-free beer strongly appeals to younger adults. Nearly two thirds (**64%**) of this category's drinkers are in the Gen Z or Millennial groups—more than double the **26%** among draft drinkers. This strong engagement by health-conscious young adults is another reason why the alcohol-free category is primed for growth—and why it deserves a place among the range of taps at the bar.

The Science Of NOLO Beer On Draft

As no and low alcohol beer continues to gain traction, the science around it is finally catching up—and it's clear this isn't just about alcohol anymore. It helps, but it's not the only thing protecting beer. You've also got:

- ✓ Low pH
- ✓ CO^2 (carbonation)
- ✓ Hop compounds (IBUs)
- ✓ Cold temperatures
- ✓ Process controls.

Even carbonation itself has been shown to have antimicrobial properties. The bottom line is that beer is a system and not a single variable—and when you remove alcohol, everything else must work harder. Preventative maintenance becomes vital to the quality of the liquid dispensed, and higher quality leads to higher revenue.



A Retailer's Popout Guide to Draft Maintenance

Core Preventative Maintenance Practices for your Draft Beer System

Draft Line Cleaning: Every Two Weeks (14 Days)

A draft system requires regular preventative maintenance before problems arise. If you can already see soil build-up, you've waited too long. To stay ahead of this, you must either contract a professional draft service company, your beer distributor or assign trained staff to clean the system every two weeks.

Chemistry: Use a sodium hydroxide-based (caustic) cleaner every two weeks to control bacteria and yeast that cause off-flavors. (Draftline recommends Micro Matic Beer Line Cleaner.)

Quarterly: Add a phosphoric acid wash to remove beer stone and mineral deposits. This step takes a bit longer but is critical.

Process: The cleaning solution should remain in the lines for at least 20 minutes. Faucets must be disassembled and scrubbed during this time.

Verification: Always ensure the system is fully rinsed post-cleaning. The service provider should verify this using pH paper or a pH meter—a simple but critical step to prevent chemical residues from entering the beer.

Tracking: Using a digital tracking system like Draftline, operators can automatically log each cleaning event, verify that the proper process was followed, and generate reports for brand compliance and internal records.

Acid Cleaning: Every Quarter (3 Months)

Complementary to Caustic Cleaning: Acid cleanings are not a replacement but an additional step. They target mineral deposits that caustic alone cannot remove. (Draftline recommends Micro MaticAcid Line Cleaner)

Timing: The acid should be circulated for no less than 20 minutes.

Faucets: As with caustic cleaning, taps should be disassembled, scrubbed, and rinsed thoroughly before reassembly.

Digital Logs: Modern operators are increasingly digitally recording acid cleanings to provide documented proof of adherence to quality guidelines.

Hardware Cleaning: Semi-Annual (Every Six Months, or as needed)

FOB Devices: Disassemble and hand-clean all Foam On Beer (FOB) devices.

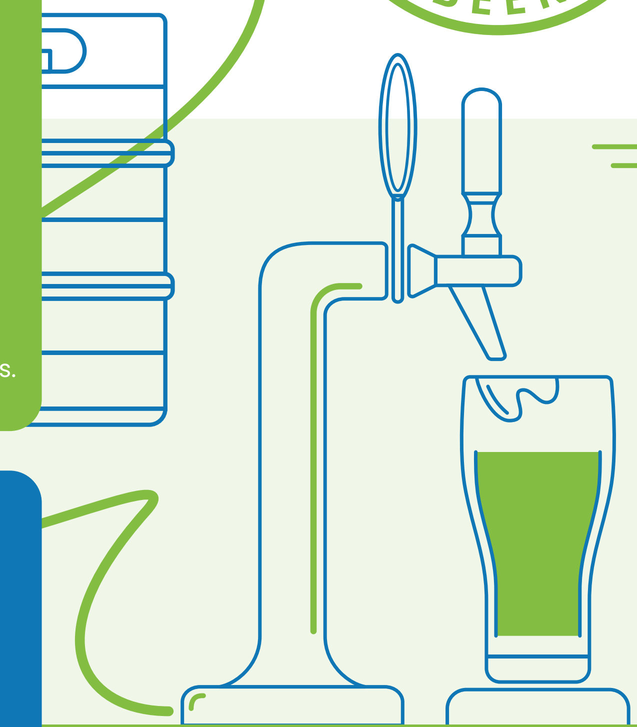
Couplers: Disassemble and hand-clean all keg couplers.

Cooler Hardware: The components in your walk-in cooler—lines, couplers, FOBs—should be as pristine as the visible towers and faucets. Dust build-up is unacceptable; take the time to wipe down equipment regularly.

Cooler Best Practices

Dedicated Beer Cooler: If possible, maintain a dedicated beer cooler. Mixing food storage with beer creates inconsistent temperatures and unsanitary conditions that can degrade draft quality.

Cleanliness: Ensure the inside of the beer cooler is kept as clean as your front-of-house equipment. Bacteria and mold can easily take hold in an unclean cooler environment.



Let's not overcomplicate this. **Clean lines** = higher velocity and trade-up. **Poor quality** = lost repeat business. And **cutting cleaning** = cutting revenue. Venues that skip cleaning don't save money—they just move the loss to the sales line. Studies show that revenue drops by around **7%** when quality slips, and when drinkers switch from draft to packaged, margins fall. In NIQ's research, the top two reasons people choose draft beer are better taste and greater freshness—and a good preventative maintenance program for our draft systems delivers beer just as the brewer intended.

How Draft Wins In Sustainability

Sustainability matters to consumers. NIQ's research consistently highlights the importance of environmental considerations in purchasing decisions. That means all venues and brands need to show their commitment to cutting their environmental impact

This is where draft beer comes in. It is one of the strongest plays the beverage sector has in low carbon footprint strategies, but it's been hiding in plain sight. One keg replaces around 1,100 cases of bottles or cans. Draft is a fully circular system, where kegs are returnable, refillable and recyclable. They require far less packaging and have lower transport waste than packaged products, and they don't end up in landfill.

Sustainability matters to margins as well. In addition to producing less waste, kegs deliver better yields and higher velocity, which means more revenue per square foot. It's not a choice between going green or making profit: it's both.

What's Next For Draft

Draft is building real momentum among both consumers and businesses. NIQ's research shows guests value its superior taste, greater freshness, better presentation and higher value (see page 7). Retailers know it delivers far higher velocity than packaged products across all segments of the market (see page 5).

Draft sits right at the intersection of brand protection, sales performance and guest experience. Get it right and draft drives satisfaction, loyalty, repeat visits and higher spend. Get it wrong and customers will switch to packaged beer and may not return. Draft is on the frontline of revenue and reputation, and consistently great execution is essential—because that's where the profit is.

The industry is aligning around all this. The Steel Keg Association and National Beer Wholesalers Association are pushing quality forward through programs like Beer First (nbwabeerfirst.com), while the Steel Keg Association Champion Awards (steelkegassociation.org) are spotlighting operators, distributors and partners who execute at a high level. They are bringing draft quality out of the back room and into the spotlight.

That matters, because what gets recognized gets repeated. Better coordination between brewers, distributors and retailers leads to better beer in the glass, less waste and stronger performance across the board. Protecting the pour protects the business, and it's getting clearer visibility than ever before.

Make Draft Work

Draftline Technologies is the parent company of Draftline Technician Services and Draftline Data. Draftline's platform "makes draft better" for modern beverage distributors and third-party service companies through its suite of data-driven, On Premise compliance, market analytics, and sales tools. Draftline is the On Premise draft leader, tracking over 1,000,000 draft lines in 100,000 accounts across 40 States.

Jennifer Hauke

Founder and Principal, Draftline Technologies

Jennifer Hauke is the Founder of Draftline Technologies. Jennifer has spent the last thirty years working in the On Premise draft category, beginning with her family's company in Detroit, Michigan. With a background that includes everything from draft service, installation, administration, and routing to product research, software development, data implementation, and sales strategy. Jennifer and her husband, Drew have three children and call Winter Park, Florida home.

Testimonials

"The information that we receive from Draftline reports is incredibly valuable. We are two steps ahead of our competition and our Team Leaders can lay out effective plans from their sales teams. By targeting specific competitive brands, we can reference where we are missing opportunities for increased distribution and sales. It is a great tool to get a bird's eye view of the overall market, and to pinpoint underrepresented breweries, brands, accounts, and territories.

Our seasonal conversations have increased by tracking competitive brands lingering in the market past their seasons.

Draftline has also given us an advantage when launching new suppliers. Using different reports, we can custom tailor a target list of accounts for distribution that makes sense and doesn't hinder the performance of any other brands in house. We can monitor open draft lines available in the market and identify where product churn is happening too frequently.

Draftline will absolutely put you in a position to increase your market share of taps, and we all know that leads to increased sales and profitability."

Nick Berg , On Premise Team Leader – NBWA

NIQ

About NIQ

NielsenIQ (NYSE: NIQ) is a leading consumer intelligence company, delivering the most complete and trusted understanding of consumer buying behavior and revealing new pathways to growth. By combining an unmatched global data footprint and granular consumer and retail measurement with decades of AI modelling expertise, NIQ builds decision systems that help companies turn complex data into confident action.

With operations in more than 90 countries, NIQ covers approximately **82%** of the world's population and more than $7.4 trillion in global consumer spend. Through cloud-based platforms, advanced analytics and AI-driven insights, NIQ delivers The Full View™—helping brands and retailers understand what consumers buy, why they buy it, and what to do next.

For more information, please visit **www.niq.com**

Draftline Technologies

About Draftline Technologies

Draftline operates in 40 states. The Draftline database tracks tap handle data in 100,000+ On Premise accounts and over 1,000,000 draft beer lines. Our Draftline Data product offers a suite of reports to measure brand performance, monitor new tap handle placements, and identify opportunities for growth. To "make draft better" we offer a Technician Services product for managing and monitoring beer line system maintenance which includes the capabilities to provide third party service audits, and supplier compliance tools.

For more information, please visit **www.draftlinetechnologies.com**

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