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## **MOST ON-PREMISE LOCATIONS ARE OPEN, BUT VOLUMES ARE VOLATILE, SHOWS BEERBOARD**

The on-premise is making significant gains, even just week over week.

The latest BeerBoard report on on-premise openings suggests that while more restaurant/bar locations are opening, the number of taps pouring isn't up that much. And some states' on-premise locations have actually lost volume in consecutive periods.

BeerBoard is a digital analytical tool for on-premise retailers and suppliers, which manages more than \$1 billion in retail draft beer sales. So they have a decent universe to draw from for on-premise trends.

Most surprisingly in this latest report: For many states that opened their on-premises the earliest, this past weekends' volumes (of June 19-21) were actually down compared to two weeks ago, June 5-7.

The weekend of June 19-21, volumes at open bar/restaurant locations was up 18% nationally vs. the two weekends prior (again, June 5-7).

But if you look at states who were among the earliest to open, almost all of them have a negative volume trend compared to two weeks prior.

Perhaps patrons in these states, where cases have risen, are simply staying home. Consider: Florida's volume trend in the on-premise is down 3% vs. two weekends ago. Texas' trend is down 10%. Tennessee is down 2%, and South Carolina is down 7%. The exception is Georgia, up 9%.

The national volume average is down 41% vs. same weekend last year.

Among the reports highlights:

- The Open Rate (“locations open and pouring beer”) has “grown steadily” since the weekend of May 8-10, when restaurants started to reopen. BeerBoard recorded only 16% of locations they track were opened that weekend. By the weekend of June 5-7, it was 66%. And as of last weekend, June 19-21, it was 84%.
- Over the past two weeks, both the average number of taps and the percentage of taps pouring across open locations are relatively flat. The average number of taps grew almost 8% nationally last weekend vs. two weekends prior, to 14 taps. That’s down more than 50% vs. year ago, when the average was 19. And as of the most recent weekend, an average of 49% of taps were pouring across open locations, up 1.3% vs. two weekends prior.
- As for segment trends: “Over the past two weeks, volume share saw Craft grow +8.9% and Domestic a more modest +2.8%,” per report. “Imports, meanwhile, were -20.9% for the two week period. Domestic grew +16.3% in Tap Percentage and Craft was +3.7. Imports were down significantly, coming in -36.5%.” Meanwhile, the top 5 styles have not changed since Memorial Day weekend, “when Belgin Wit/White Ales leaped over Wheat/Hefeweizen to #4.” The top three styles are light lager, lager and IPA.