

COVID Reopening Report

for the On Premise

June 23, 2020



OVERVIEW

BeerBoard is the leading technology company enabling the food & beverage industry to make data-driven decisions about its bar business. We manage over \$1 billion in retail draft beer sales and 45,000 products through our industry-leading solution.

Our patented digital platform captures, analyzes, and reports real-time data related to bar performance, brand insights and inventory.

The return of on premise sales and draft volume has continued to increase. In this report, we take a look at the weekend of June 19-21 and compare that to our two previous reports - Memorial Day Weekend (May 22-25) and the weekend of June 5-7).

Cheers!

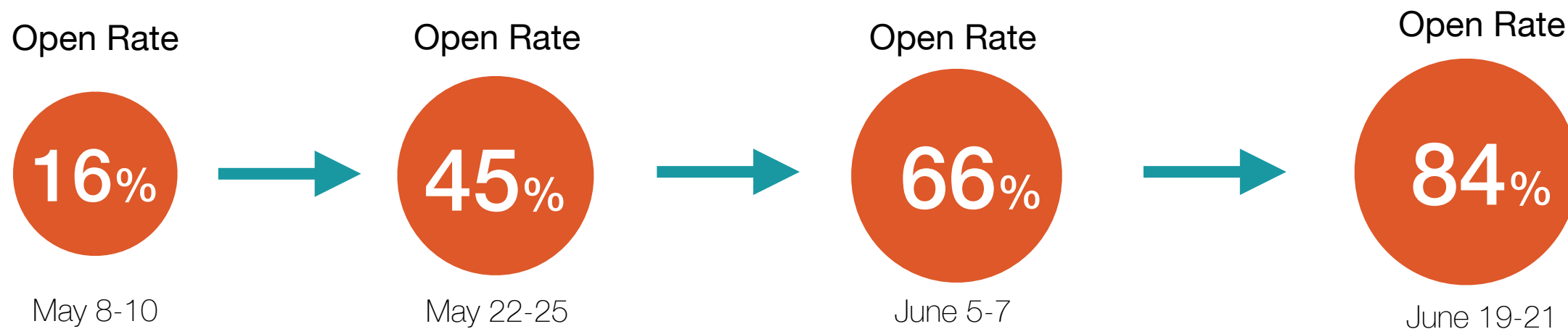
The BeerBoard Team



OPEN RATE







Currently, every state has opened on-premise dining or announced plans to do so. New Jersey is the last state to do so (starting June 15), albeit entirely outdoor dining.





The Open Rate (locations open and pouring beer) has grown steadily since the weekend of May 8-10 (the first weekend states truly began to reopen). This past weekend (June 19-21) finds 84% of locations open and pouring beer, growing from 66% two weeks ago.



TAPS: AVERAGE & PERCENTAGE POURING

Over the past two weeks, both Average Number of Taps and Percentage Taps Pouring are both relatively unchanged. Nationally, the Average Number of Taps grew +7.7%, while Percentage Taps Pouring was +1.3%

	May 22-25 	June 5-7 	June 19-21 	From Previous 	Same Weekend 2019 	YOY 
	Avg. # Taps	Avg. # Taps	Avg. # Taps	% Change	Avg. # Taps	% Change
National	12	13	14	+7.7%	29	-51.7%
Florida	14	14	14	—	28	-50.0%
Georgia	12	14	14	—	41	-65.9%
Texas	13	14	14	—	26	-46.2%
Tennessee	11	12	12	—	39	-69.2%
South Carolina	12	14	14	—	43	-67.4%

	May 22-25 	June 5-7 	June 19-21 	From Previous 
	% Taps Pouring	% Taps Pouring	% Taps Pouring	% Change
National	45%	48%	49%	+1.3%
Florida	51%	53%	53%	+0.4%
Georgia	49%	57%	56%	-2.1%
Texas	43%	50%	52%	+4.8%
Tennessee	32%	41%	41%	-0.5%
South Carolina	41%	57%	56%	-2.3%

* average number of taps is rounded to the nearest whole number

VOLUME: CHANGE & RATE OF SALE

Volume grew 18% nationally, but looks to be flattening in the states which were early to open. When compared to the same weekend in 2019, as expected, volume is still down significantly. The 30-Day Per Tap Rate of Sale has started to flatten or drop nominally, but is significantly outperforming per-tap 30-Day Rate of Sale for the same weekend in 2019.

CHANGE

June 5-7



Volume Change

Same Weekend 2019



Volume Change

National
Florida
Georgia
Texas
Tennessee
South Carolina

+18%
-3%
+9%
-10%
-2%
-7%

-41%
-29%
-31%
-27%
-29%
-40%

RATE OF SALE

May 22-25



30-Day ROS

June 5-7



30-Day ROS

June 19-21



30-Day ROS



% Change

Same Weekend 2019



30-Day ROS



% Change

National
Florida
Georgia
Texas
Tennessee
South Carolina

3.20
3.32
2.11
4.37
3.09
2.44

3.51
3.50
2.51
5.58
3.62
2.61

3.16
3.15
2.50
4.91
3.53
2.62

-9.7%
-10.0%
-0.4%
-12.0%
-2.5%
+0.4%

2.69
2.99
1.65
3.94
2.16
1.60

+17.5%
+5.4%
+51.5%
+24.6%
+63.4%
+63.8%

% Change is June 19-21 compared to June 5-7

CATEGORY & STYLE PERFORMANCE

Over the past two weeks, Volume Share saw Craft grow +8.9% and Domestics a more modest +2.8%. Imports, meanwhile, were -20.9% for the two week period. Domestics grew +16.3% in Tap Percentage and Craft was +3.7. Imports were down significantly, coming in -36.5%.

The Top 5 Styles remained unchanged over the past two weeks, and have not changed since Memorial Day weekend, when Belgian Wit/White Ales leaped over Wheat/Hefeweizen to #4.

May 22-25

Volume %



Tap %



Domestic	53.9%	30.7%
Craft	27.7%	49.7%
Import	18.4%	19.6%

June 5-7

Volume %



Tap %



Domestic	53.0%	30.1%
Craft	27.9%	51.3%
Import	19.1%	18.6%

June 19-21

Volume %



Tap %



Domestic	54.5%	35.0%
Craft	30.4%	53.2%
Import	15.1%	11.8%

Top 5 Styles

1. Light Lager
2. Lagers
3. IPA
4. Belgian Wit / White Ale
5. Wheat / Hefeweizen

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Thirsty For More?

Want to see where BeerBoard's data and insights can take you and your operation? Contact us at retailsales@beerboard.com or 888.298.3641.

We always love talking beer!

