

COVID Reopening Report

for the On Premise

July 3-5, 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.

In this report, we take a look at the weekend of Jul 3-5 and compare that to our two previous reports - June 5-7 and June 19-21.

Cheers!
The BeerBoard Team

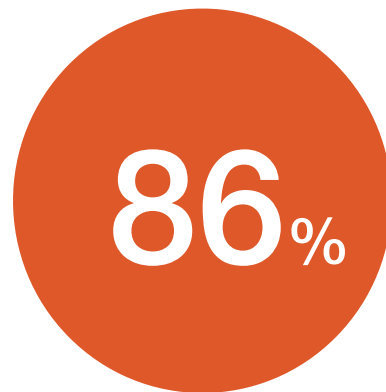


OPEN RATE

Currently, every state has opened on-premise dining or announced plans to do so. New Jersey was 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.

Current Open Rate



July 3-5







Weekly Rates



May 8-10	16%
May 22-25	45%
June 5-7	66%
June 19-21	84%
July 3-5	86%

TAPS: AVERAGE # OF TAPS





The Average Number of Taps has remained steady the past two weeks, both nationally in states which were early to open (i.e. Florida, Georgia and Texas). In states which have come online in the last month, there is a little more movement. New York dropped 20% of its taps, while Minnesota and Nevada were both +8.3% for the period.

	June 5-7 	June 19-21 	July 3-5 	% Change 	Same Weekend 2019 	YOY 
	Avg. # Taps	Avg. # Taps	Avg. # Taps	From Previous	Avg. # Taps	% Change
National	13	14	14	—	29	-51.7%
Florida	14	14	14	—	28	-50.0%
Georgia	14	14	14	—	41	-65.9%
Texas	14	14	14	—	26	-46.2%
Tennessee	12	12	12	—	39	-69.2%
South Carolina	14	14	14	—	43	-67.4%
New York	9	15	12	-20%	24	-50.0%
Illinois	10	10	11	+10%	26	-57.7%
Michigan	15	16	15	-6.3%	23	-34.8%
Minnesota	13	12	13	+8.3%	27	-51.9%
Nevada	11	12	13	+8.3%	26	-50.0%

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

TAPS: PERCENTAGE POURING

Over the past two weeks, the Percentage Taps Pouring have started to decline, including 10.2% nationally. States that had been on the rise previously are also starting to fall, including New York (12.9%), Illinois (-13.9%) and Michigan (-6.8%)

	June 5-7 	June 19-21 	July 3-5 	% Change 
	% Taps Pouring	% Taps Pouring	% Taps Pouring	From Previous
National	48%	49%	44%	-10.2%
Florida	53%	53%	47%	-11.3%
Georgia	57%	56%	54%	-3.6%
Texas	50%	52%	47%	-9.6%%
Tennessee	41%	41%	39%	-4.9%
South Carolina	57%	56%	51%	-8.9%
New York	36%	54%	47%	-12.9%
Illinois	38%	43%	37%	-13.9%
Michigan	34%	44%	41%	-6.8%
Minnesota	52%	43%	45%	+4.7%
Nevada	40%	42%	47%	+11.9%

* % Change From Previous compares the current period (July 3-5) against the previous period (June 19-21)

VOLUME: CHANGE

With more states rolling back policies for the on-premise, Volume had a precipitous fall. It dropped -31% nationally, and saw large declines in Texas (-58%), Florida (-34%) and Tennessee (-31%). New York saw healthy growth as it continues to reopen, climbing +45% over the two-week period.

VOLUME CHANGE FROM

June 19-21



% Change

National
Florida
Georgia
Texas
Tennessee
South Carolina
New York
Illinois
Michigan
Minnesota
Nevada

-31%
-34%
-14%
-58%
-31%
-16%
+45%
-13%
-31%
10%
-23%

Same Weekend 2019









% Change

-50%
-35%
-43%
-31%
-34%
-41%
-74%
-72%
-50%
-71%
-59%

VOLUME: RATE OF SALE

Similar to the other areas we look at in this report, 30-Day Rate of Sale is beginning to fall steadily. Over the two-week period, ROS was -6.9% nationally, and down in other early-openers: Florida (-6.9%), Georgia (-9.9%) and Texas (-9.9%). New York saw a healthy 20.4% boost, while Nevada was up a nominal +1.8%.







RATE OF SALE	June 5-7 	June 19-21 	July 3-5 	% Change 	Same Weekend 2019 	YOY 
	30-Day ROS	30-Day ROS	30-Day ROS	From Previous	30-Day ROS	% Change
National	3.51	3.16	2.94	-6.9%	2.69	+9.2%
Florida	3.50	3.15	2.93	-6.9%	2.99	-2.0%
Georgia	2.51	2.50	2.25	-10.0%	1.65	+36.4%
Texas	5.58	4.91	4.58	-6.7%	3.94	+16.2%
Tennessee	3.62	3.53	3.14	-11.0%	2.16	+45.4%
South Carolina	2.61	2.62	2.29	-12.6%	1.60	+43.1%
New York	2.09	1.37	1.65	+20.4%	1.82	-9.3%
Illinois	2.19	2.87	2.40	-16.4%	2.76	-13.0%
Michigan	4.21	2.72	2.67	-1.8%	2.32	+15.1%
Minnesota	1.33	2.26	2.20	-2.7%	2.78	-20.9%
Nevada	3.05	3.39	3.45	+1.8%	3.72	-7.3%

* % Change From Previous compares the current period (July 3-5) against the previous period (June 19-21)

CATEGORY & STYLE PERFORMANCE

Over the past two weeks, Craft had another positive volume trend, growing share from 30.4% to 32.5%. Domestics fell from 54.5% to 53.6% share, while Imports were down again, coming in at 14.0%.

The Top 5 Styles saw Euro Lagers move into the #5 position, replacing Wheat / Hefeweizen (which actually clocked in at #4 back as recently as May 8-10). The top four styles remained unchanged.

June 5-7			June 19-21			July 3-5		
Volume Share		Tap Share	Volume Share		Tap Share	Volume Share		Tap Share
								
Domestic	53.0%	30.1%	Domestic	54.5%	35.0%	Domestic	53.6%	34.7%
Craft	27.9%	51.3%	Craft	30.4%	53.2%	Craft	32.5%	54.3%
Import	19.1%	18.6%	Import	15.1%	11.8%	Import	14.0%	11.0%

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

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 - 2. Lagers
 - 3. IPA
 - 4. Belgian Wit / White Ale
 - 5. Euro Lagers

ABOUT BEERBOARD

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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!

