COVID Reopening Report
for the On Premise

July 17-19, 2020

BEERBOARD

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 July 17-19 and compare that to our two previous reports - June 19-21 and July 3-5.

Cheers!
The BeerBoard Team

OPEN RATE

The Open Rate (locations open and pouring beer) continues to grow steadily This past weekend (July 17-19) finds 91% of locations now open and pouring beer, growing from 86% two weeks ago.

The next few weeks will be interesting to track, as states begin to roll back policies and reintroduce restrictions for on-premise dining and alcohol consumption.

Current Open Rate

July 17-19

Weekly Rates

May 8-10	16%
May 22-25	45%
June 5-7	66%
June 19-21	84%
July 3-5	86%
July 17-19	91%

TAPS: AVERAGE # OF TAPS

The Average Number of Taps has remained steady nationally the past four weeks. Taps continue to be added in states which were a little later to open, including New York (+16.7%), Michigan (+13.3%) and Nevada (+7.7%).

	June 19-21	**July 3-5**	**July 17-19**	**% Change**	**Same Weekend 2019**	**YOY**
	Avg. # Taps	Avg. # Taps	Avg. # Taps	From Previous	Avg. # Taps	% Change
National	14	14	14	—	29	-51.7%
Florida	14	14	14	—	28	-50.0%
Georgia	14	14	14	—	41	-65.9%
Texas	14	14	15	+7.1%	26	-42.3%
Tennessee	12	12	13	+8.3%	39	-66.7%
South Carolina	14	14	14	—	43	-67.4%
New York	15	12	14	+16.7%	24	-41.7%
Illinois	10	11	12	+9.1%	26	-53.8%
Michigan	16	15	17	+13.3%	23	-26.1%
Minnesota	12	13	14	+7.7%	27	-48.1%
Nevada	12	13	14	+7.7%	26	-46.2%

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

TAPS: PERCENTAGE POURING

Over the past two weeks, the Percentage Taps Pouring have held steady nationally, checking in at 49% for the second consecutive period. Both Nevada (+19%) and Minnesota (+18.6%) saw healthy jumps in percentage taps pouring, while Michigan was also up (+9.1%).

	June 19-21	**July 3-5**	**July 17-19**	**% Change**
	% Taps Pouring	% Taps Pouring	% Taps Pouring	From Previous
National	48%	49%	49%	—
Florida	53%	53%	53%	—
Georgia	57%	56%	57%	+1.8%
Texas	50%	52%	54%	+3.8%
Tennessee	41%	41%	43%	+4.9%
South Carolina	57%	56%	57%	+1.8%
New York	36%	54%	49%	-9.3%
Illinois	38%	43%	42%	-2.3%
Michigan	34%	44%	48%	+9.1%
Minnesota	52%	43%	51%	+18.6%
Nevada	40%	42%	50%	+19.0%

* *% Change From Previous compares the current period (July 17-19) against the previous period (July 3-5)*

VOLUME: CHANGE

On-premise volume was up over the previous period (as compared to July 3-5) and it was up big. The 4th of July weekend typically sees a dip for bars and restaurants, so it was no surprise to see a surge - but the climb was notable. Nationally, volume was +50%. Texas led the way among states tracked, climbing 71% over the previous period, while every other state was up healthy double-digits.

VOLUME CHANGE FROM	July 3-5	Same Weekend 2019
	% Change	% Change
National	+50%	-41%
Florida	+41%	-29%
Georgia	+37%	-31%
Texas	+71%	-27%
Tennessee	+58%	-29%
South Carolina	+51%	-40%
New York	+23%	-59%
Illinois	+58%	-81%
Michigan	+36%	-30%
Minnesota	+33%	-56%
Nevada	+32%	-59%

VOLUME: RATE OF SALE

Rate of Sale continues to trend downward nationally. Following a fall of -6.9% in the last report, it was -5.1% for the most recent period (July 17-19, as compared to July 3-5). After a climb over the July 4th weekend, New York dropped -9.7%, while Michigan was -6.7%. Minnesota led states tracked with a bump up of +8.2%.

RATE OF SALE	June 19-21	July 3-5	July 17-19	% Change	Same Weekend 2019	YOY
	30-Day ROS	30-Day ROS	30-Day ROS	From Previous	30-Day ROS	% Change
National	3.16	2.94	2.79	-5.1%	2.50	+11.6%
Florida	3.15	2.93	2.80	-4.4%	2.68	+4.5%
Georgia	2.50	2.25	2.27	+0.9%	1.35	+68.1%
Texas	4.91	4.58	4.39	-4.1%	3.79	+15.8%
Tennessee	3.53	3.14	3.09	-1.6%	1.91	+61.8%
South Carolina	2.62	2.29	2.30	-0.4%	1.31	+75.6%
New York	1.37	1.65	1.49	-9.7%	1.64	-9.1%
Illinois	2.87	2.40	2.44	-1.7%	2.73	-10.6%
Michigan	2.72	2.67	2.49	-6.7%	2.26	+10.2%
Minnesota	2.26	2.20	2.38	+8.2%	2.76	-13.8%
Nevada	3.39	3.45	3.55	+2.9%	3.64	-2.5%

* *% Change From Previous compares the current period (July 17-19) against the previous period (July 3-5)*

CATEGORY & STYLE PERFORMANCE

Craft continues its boom, checking in this weekend with 34.8% share. It has climbed from 30.4% on the weekend of June 19-21. Domestic saw a slight uptick, growing to 54.9% from 53.6% last period. Import saw a big decline, dropping to 10.3% from 14.0%.

The big news among Styles was Belgian Wit / White Ale overtaking IPA for the #3 position. Wheat / Hefeweizen also jumped back into the Top 5, bumping out Euro Lagers (the two have traded the #5 slot over the past two reporting periods).

June 19-21

	Volume Share	Tap Share
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

July 3-5

	Volume Share	Tap Share
Domestic	53.6%	34.7%
Craft	32.5%	54.3%
Import	14.0%	11.0%

Top 5 Styles

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

July 3-5

	Volume Share	Tap Share
Domestic	54.9%	30.9%
Craft	34.8%	55.3%
Import	10.3%	13.8%

Top 5 Styles

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

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!