

September 29, 2020

On-Premise Continues March Toward Normal ... For Now

BeerBoard's latest update on the state of the on-premise shows some gains in percentage of taps pouring as well as volume trends.

To grok the latest on-premise stats, and witness the past week's reopening headlines, the on-premise is sustaining a steady trot back to fuller capacity — *at least for now*, before another possible wave in the fall. Hey, make hay while the sun shines, right?

First, the stats. BeerBoard just released its latest read across the \$1 billion of retail draft beer sales it measures and manages through its digital/data services.

Volume and rate of sale continue to climb sequentially in the data. For the latest weekend measured, September 25-27 (vs. the prior report covering the weekend of September 11-13), on-premise volume per location grew 13.5% nationally, even as the prior period had already grown 6.5%. The 13.5% growth trend is still down 35% vs. the prior year comp.

Florida was up almost twice the national rate, at 21.4%. And even New York, which will not see the return of indoor dining until tomorrow (see next story) was up 13.1%. A couple of other states, including Tennessee and Georgia, saw trends slightly better than the national reading.

Of course, with the average number of taps at 18, 50% of what they were a year ago, the kegs that are there are turning faster.

Rate of sale realized for the most recent weekend was up 8.2%, “following a +7.1% climb Sept 11-13.”

And in fact, nine of 10 states tracked saw their rate of sale grow, with Georgia up 12.5%, and Florida up 11.2%.

“Tracking YOY data for the same weekend in 2019, Georgia was +133.8%, while South Carolina (+130.7%) and Tennessee (+106.1%) were also up significantly.”

What's more: CBD readers may have seen our note last week [see [CBD 09-24-20](#)] on Nielsen CGA's presentation at the Brewers Association's "Collab Hour."

The firm's client solutions director, Matt Crompton, shared that while on-premise trends have largely plateaued for the past few weeks, the month of August was good for dollar velocity sales. From August 1 to August 29, sales velocity in key states (CA, FL, IL, NY, TX) increased +16%.

Those are all pretty good sequential trends, at least, as more states relax dining and even bar restrictions. Read on. (And let me know what you are seeing in the backyard of your on-premise: Ping me in confidence at hs@beernet.com.)