

November 11, 2020

## On-Premise Takes a Step Back in Latest BeerBoard Data

With the number of COVID cases reaching new heights, the on-premise is once again back on the decline.

Indeed, the latest data set from BeerBoard shows that the number of on-premise establishments open over this past weekend fell for the first time since early August. The open rate, which BeerBoard defines as “locations open and pouring beer,” had grown from 89% at the beginning of August to 92% in recent weekends, but regressed to 90% in this latest weekend (November 6-8).

The open rate wasn't the only metric on the decline, however. This data set also revealed that the number of tap handles, percentage of taps pouring and volume all fell this latest weekend as well.

The average number of taps on a national level dropped from 18 to 17 over the weekend, marking its first decline since September. The percentage of taps pouring nationally fell 3% from the previous weekend tracked (October 23-25). And volume declined by 8.7%.

**ILLINOIS' ON-PREMISE NUMBERS PLUNGE.** But no state's on-premise channel took a hit like Illinois' did over the weekend. The state, which recently banned indoor bar and dining service as it grapples with a wave of growing COVID cases, saw its on-premise numbers plunge in the latest set of BeerBoard data.

The average number of tap handles in the state were cut in half compared to the previous weekend, falling from 14 to 7; its percentage of taps pouring dropped by 46.4%, to 30%; and its on-premise volume declined by a whopping 48%.

**CRAFT VOLUME SLIPS, IMPORTS GAIN.** It would appear that this latest regression in the on-premise disproportionately affected craft, as its volume share slipped from 36.4% in the previous weekend to 31.4% in this latest set, and its tap share declined from 59.5% to 56.9%. Eating up all that lost share from craft were imports, which saw its volume share jump from 10.1% in the previous weekend to 14.6% in this latest set, and its tap share increasing from 14.6% to 17.2%.