

On Premise Status Report

August 28-30, 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 60,000 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 On Premise Status Report, we take a look at the weekend of August 28-30 and compare that to our two previous reports - August 14-16 and July 31-August 2.

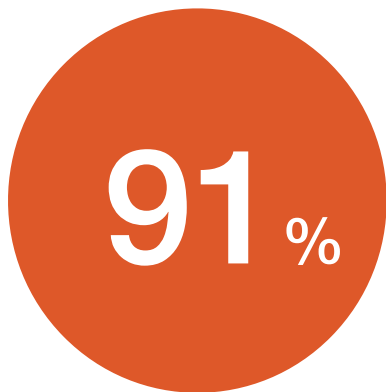
Cheers!
The BeerBoard Team



OPEN RATE

The Open Rate (locations open and pouring beer) held steady at 91%, this for the second consecutive period and third-of-four.

Current Open Rate



August 28-30







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%
July 31-Aug 2	89%
Aug 14-16	91%
Aug 28-30	91%

TAPS: AVERAGE # OF TAPS





Average Number of Taps held firm at 16 per location nationally, mirrored by six of the 10 states tracked in this report. Michigan added two taps per location, climbing to 20 per, while Georgia and Minnesota each added one tap per location. Over the past two periods, Minnesota has climbed from 15 taps per location to its most recent count of 19 per.

	July 31-Aug 2	Aug 14-16	Aug 28-30	% Change	Same Weekend 2019	YOY
						
	Avg. # Taps	Avg. # Taps	Avg. # Taps	From Previous	Avg. # Taps	% Change
National	15	16	16	—	32	-50.0%
Florida	15	16	16	—	28	-42.9%
Georgia	14	14	15	+7.1%	42	-64.3%
Texas	16	17	17	—	29	-41.4%
Tennessee	15	16	16	—	39	-59.0%
South Carolina	14	16	15	-6.3%	40	-62.5%
New York	16	17	17	—	25	-32.0%
Illinois	13	15	15	—	28	-46.4%
Michigan	18	18	20	+11.1%	24	-16.7%
Minnesota	15	18	19	+5.6%	30	-36.7%
Nevada	15	20	20	—	26	-23.1%

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

TAPS: PERCENTAGE POURING

Similarly to the Open Rate and Average Number of Taps, the Percentage of Taps Pouring was flat nationally for the period. Most states tracked were relatively flat, as well, seeing anything from a 1.9% loss (Tennessee) to a 3.8% gain (Michigan). Mirroring its growth in Average Taps, Minnesota saw the largest bump in Percentage Pouring at +6.5%.

	July 31-Aug 2 	Aug 14-16 	Aug 28-30 	% Change 
	% Taps Pouring	% Taps Pouring	% Taps Pouring	From Previous
National	52%	57%	57%	—
Florida	53%	60%	59%	-1.7%
Georgia	58%	61%	62%	+1.6%
Texas	57%	60%	60%	—
Tennessee	48%	54%	53%	-1.9%
South Carolina	59%	66%	64%	-3.0%
New York	55%	57%	59%	+3.5%
Illinois	47%	54%	54%	—
Michigan	50%	53%	55%	+3.8%
Minnesota	53%	62%	66%	+6.5%
Nevada	55%	73%	73%	—



* *Percentage Pouring is current percentage of taps pouring vs total number taps listed per location*

* *% Change From Previous compares the current period against the previous period*

VOLUME: CHANGE PER LOCATION

Source: Market Research







On-premise volume (per location) saw a slight dip from August 14-16, down -1.6%. New York was up a healthy +8.4%, while Illinois and Georgia were both down double-digits, falling -12.6% and -10.1%, respectively.

VOLUME CHANGE FROM	Aug 14-16 	Same Weekend 2019 
	% Change	% Change
National	-1.6%	-35%
Florida	-3.7%	-26%
Georgia	-10.1%	-37%
Texas	-1.6%	-33%
Tennessee	-8.4%	-30%
South Carolina	-5.1%	-41%
New York	+8.4%	-52%
Illinois	-12.6%	-53%
Michigan	-7.6%	-32%
Minnesota	—	-55%
Nevada	-5.76	-44%

* Volume totals per location

VOLUME: RATE OF SALE

Rate of Sale was flat Nationally, and fell in nine of 10 states tracked in the period. Illinois (-5.5%) and Nevada (-5.1%) saw the largest drops, respectively.

RATE OF SALE	July 31-Aug 2  30-Day ROS	Aug 14-16  30-Day ROS	Aug 28-30  30-Day ROS	% Change  From Previous	Same Weekend 2019  30-Day ROS	YOY  % Change
National	2.81	2.94	2.96	+0.7%	2.63	+12.5%
Florida	2.87	2.98	2.96	-0.7%	2.63	+12.5%
Georgia	2.29	2.36	2.35	-0.4%	1.42	+65.5%
Texas	4.71	5.15	5.12	-0.6%	3.89	+31.6%
Tennessee	3.08	3.09	2.96	-4.2%	2.01	+47.3%
South Carolina	2.36	2.43	2.36	-2.9%	1.32	+78.8%
New York	1.55	1.60	1.60	—	1.85	-13.5%
Illinois	2.50	2.54	2.40	-5.5%	2.61	-8.0%
Michigan	2.41	2.52	2.51	-0.4%	2.30	+9.1%
Minnesota	2.42	2.38	2.33	-2.1%	2.85	-18.2%
Nevada	3.58	3.56	3.38	-5.1%	3.68	-8.2%

* % Change From Previous compares the current period against the previous period

CATEGORY & STYLE PERFORMANCE

Craft continues to siphon a little volume share each period, this time climbing to 36.7%, up from 35.7% (August 18-20) and 34.4% a month back (July 31-Aug 2). Domestic checked in at 53.3%, down from 54.2%, while Imports remained flat at 10.0%. Craft taps fell to 59.0%, down from a high of 65.8% two weeks ago. Domestic picked up the variance, climbing back to 27.6%.

The Top 5 Styles held firm for the second consecutive period. The battle for #3 between IPA and Belgian Wit / White Ale seems to be over, for the time being at least. The gap between the two continues to widen as IPA has firmly re-established itself as the #3 style.

July 31-Aug 2

Volume Share Tap Share



Domestic	55.1%	30.0%
Craft	34.4%	56.2%
Import	10.5%	13.7%

August 14-16

Volume Share Tap Share



Domestic	54.2%	20.5%
Craft	35.7%	65.8%
Import	10.1%	13.7%

August 28-30

Volume Share Tap Share



Domestic	53.3%	27.6%
Craft	36.7%	59.0%
Import	10.0%	13.4%

Top 5 Styles

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

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3. Belgian Wit / White Ale
4. IPA
5. Wheat / Hefeweizen

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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!

