

On Premise Status Report

September 11-13, 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 September 11-13 and compare that to our two previous reports - August 28-30 and August 14-16.

Cheers!
The BeerBoard Team



OPEN RATE

The Open Rate (locations open and pouring beer) ticked up one point, climbing to 92%. It has previously been at 91% for the two prior period, and three of the previous four.

Current Open Rate



September 11-13







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%
Sept 11-13	92%

TAPS: AVERAGE # OF TAPS





Average Number of Taps climbed to 17 per location nationally, and saw increases in seven of the 10 states tracked in this report. South Carolina added two taps per location, climbing to an average of 17 per. Minnesota continued its steady growth, checking in at 20 per location (this is up from 15 taps per location as recent as July 31-Aug 2).

	Aug 14-16  Avg. # Taps	Aug 28-30  Avg. # Taps	Sept 11-13  Avg. # Taps	% Change  From Previous	Same Weekend 2019  Avg. # Taps	YOY  % Change
National	16	16	17	+6.3%	36	-52.3%
Florida	16	16	17	+6.3%	31	-45.2%
Georgia	14	15	16	+6.7%	43	-62.8%
Texas	17	17	17	—	32	-46.9%
Tennessee	16	16	17	+6.3%	42	-59.5%
South Carolina	16	15	17	+13.3%	44	-61.2%
New York	17	17	18	+5.9%	27	-37.0%
Illinois	15	15	16	+6.7%	31	-48.4%
Michigan	18	20	21	+5.0%	27	-22.2%
Minnesota	18	19	20	+5.3%	33	-39.4%
Nevada	20	20	20	—	29	-31.0%

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

TAPS: PERCENTAGE POURING

Percentage of Taps Pouring saw significant growth over the September 11-13 weekend (college and professional football is back). Nationally, taps pouring grew +14.0%, while Michigan led states tracked with an impressive +27.3% jump. Florida was up a healthy +18.6%, followed by Texas (+11.7%), Tennessee (+11.3%) and Illinois (+11.1%).



	Aug 14-16 	Aug 28-30 	Sept 11-13 	% Change 
	% Taps Pouring	% Taps Pouring	% Taps Pouring	From Previous
National	57%	57%	65%	+14.0%
Florida	60%	59%	70%	+18.6%
Georgia	61%	62%	67%	+8.1%
Texas	60%	60%	67%	+11.7%
Tennessee	54%	53%	59%	+11.3%
South Carolina	66%	64%	71%	+10.9%
New York	57%	59%	64%	+8.5%
Illinois	54%	54%	60%	+11.1%
Michigan	53%	55%	70%	+27.3%
Minnesota	62%	66%	73%	+10.6%
Nevada	73%	73%	75%	+2.7%

* *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







Bouncing back from a slow weekend on August 28-30, on-premise Volume (per location) grew +6.5%. Florida saw explosive growth at the taps, surging +25.6% for the weekend. Illinois (+18.1%), Michigan (+16.6%), South Carolina (+15.0) and Minnesota (+13.7%) were all also up double-digits.

VOLUME CHANGE FROM	Aug 28-30	Same Weekend 2019
	 % Change	 % Change
National	+6.5%	-32%
Florida	+25.6%	-20%
Georgia	+9.0%	-36%
Texas	+0.9%	-32%
Tennessee	+8.3%	-31%
South Carolina	+15.0%	-41%
New York	+5.3%	-51%
Illinois	+18.1%	-50%
Michigan	+16.6%	-31%
Minnesota	+13.7%	-54%
Nevada	-1.9%	-42%

* Volume totals per location

VOLUME: RATE OF SALE

Rate of Sale climbed +7.1%, coming off a flat weekend on August 28-30. Every state tracked saw growth (most significant) for the period. South Carolina led the way with a +32.6% increase. Florida and Illinois were up +30.1% and +29.2%, respectively. YOY returns for ROS were also rocketing off the charts, as evidence in the chart below.

RATE OF SALE	Aug 14-16 	Aug 28-30 	Sept 11-13 	% Change 	Same Weekend 2019 	YOY 
	30-Day ROS	30-Day ROS	30-Day ROS	From Previous	30-Day ROS	% Change
National	2.94	2.96	3.17	+7.1%	2.66	+19.2%
Florida	2.98	2.96	3.85	+30.1%	2.62	+46.9%
Georgia	2.36	2.35	2.89	+23.0%	1.50	+92.7%
Texas	5.15	5.12	5.90	+15.2%	3.86	+52.8%
Tennessee	3.09	2.96	3.73	+26.0%	2.01	+85.6%
South Carolina	2.43	2.36	3.13	+32.6%	1.33	+135.3%
New York	1.60	1.60	1.93	+20.6%	1.90	+1.6%
Illinois	2.54	2.40	3.10	+29.2%	2.71	+14.4%
Michigan	2.52	2.51	3.12	+24.3%	2.40	+30%
Minnesota	2.38	2.33	2.58	+10.7%	2.93	-11.9%
Nevada	3.56	3.38	3.52	+4.1%	3.76	-6.4%



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

CATEGORY & STYLE PERFORMANCE

Domestic saw a +1.2% jump in Volume Share for the weekend, possibly fueled by the return of football, while Imports (+0.7%) and Craft (+0.5%), stole back a sliver of Tap Share.

The Top 5 Styles held firm for the third consecutive period.



August 14-16

	Volume Share	Tap Share
		
Domestic	54.2%	20.5%
Craft	35.7%	65.8%
Import	10.1%	13.7%

Top 5 Styles

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



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. Wheat / Hefeweizen

September 11-13

	Volume Share	Tap Share
		
Domestic	54.5%	26.4%
Craft	35.9%	59.5%
Import	9.6%	14.1%

Top 5 Styles

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

ABOUT BEERBOARD

BeerBoard is a technology company enabling the food & beverage industry to make data-driven decisions about its bar business. It manages over \$1 billion in retail draft beer sales and 60,000 products through its industry-leading solution. The company's patented digital platform captures, analyzes, and reports real-time data related to bar performance, brand insights and inventory. Built for retailers, brewers and distributors, the versatile technology is easily operated from a single dashboard, and it has streamlined operations and increased top and bottom line revenue all over the United States.

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!

