

On-Premise Status Report

September 25-27, 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 25-27 and compare that to our two previous reports - September 11-13 and August 28-30.

Cheers!
The BeerBoard Team



OPEN RATE

The Open Rate (locations open and pouring beer) held firm at 92% for the second consecutive period. It has previously been at 91% for the two prior period, and three of the previous four.

Current Open Rate



September 25-27







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%
Sept 25-27	92%

TAPS: AVERAGE # OF TAPS





The Average Number of Taps continues to tick up, this weekend adding one more to the count and coming in at 18 per location nationally. Michigan, Tennessee and Texas all added one (1) tap per location, while seven of the states tracked held firm with their tap count.

	Aug 28-30 	Sept 11-13 	Sept 25-27 	% Change 	Same Weekend 2019 	YOY 
	Avg. # Taps	Avg. # Taps	Avg. # Taps	From Previous	Avg. # Taps	% Change
National	16	17	18	+5.9%	36	-50.0%
Florida	16	17	17	—	30	-43.3%
Georgia	15	16	16	—	42	-61.9%
Texas	17	17	18	+5.9%	34	-47.1%
Tennessee	16	17	18	+5.9%	41	-56.1%
South Carolina	15	17	17	—	44	-61.4%
New York	17	18	18	—	25	-28.0%
Illinois	15	16	16	—	30	-46.7%
Michigan	20	21	22	+4.8%	28	-21.4%
Minnesota	19	20	20	—	32	-37.5%
Nevada	20	20	20	—	30	-33.3%

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

TAPS: PERCENTAGE POURING

Coming off a sizable bump in the previous period, Percentage of Taps Pouring saw nominal growth nationally (+1.5%) on the weekend. Among states tracked, Georgia saw a +8.1% bump, climbing to 68% of taps pouring. Nevada held steady at 75% of taps pouring, leading the way among states tracked in this report.

	Aug 28-30	Sept 11-13	Sept 25-27	% Change
				
	% Taps Pouring	% Taps Pouring	% Taps Pouring	From Previous
National	57%	65%	66%	+1.5%
Florida	59%	70%	72%	+2.9%
Georgia	62%	67%	68%	+8.1%
Texas	60%	67%	69%	+1.5%
Tennessee	53%	59%	63%	+6.8%
South Carolina	64%	71%	73%	+2.8%
New York	59%	64%	67%	+4.7%
Illinois	54%	60%	62%	+3.3%
Michigan	55%	70%	71%	+1.4%
Minnesota	66%	73%	70%	-4.1%
Nevada	73%	75%	75%	—

* *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

On-Premise Volume (per location) grew for a second straight period, climbing +13.5% nationally from September 11-13. This follows a +6.5% bump in the previous period. Florida saw significant growth again, this time checking in at +21.4% (the state was +25.6% in the previous report). Tennessee (+21.0%), Georgia (+19.1%), New York (+13.1%) and Texas (+12.2%) all realized double-digit growth per location.

VOLUME CHANGE PER LOCATION

Compared to Sept 11-13



% Change

Compared to Same Weekend 2019









% Change

National	+13.5%	-35%
Florida	+21.4%	-22%
Georgia	+19.1%	-35%
Texas	+12.2%	-30%
Tennessee	+21.0%	-29%
South Carolina	+8.6%	-45%
New York	+13.1%	-50%
Illinois	+7.8%	-52%
Michigan	+8.4%	-30%
Minnesota	-0.3%	-52%
Nevada	+5.7%	-41%

* Volume totals per location

VOLUME: RATE OF SALE

Rate of Sale realized +8.2% growth for the weekend, following a +7.1% climb Sept 11-13. Nine of the 10 states tracked saw growth in ROS, led by Georgia (+12.5%) and Florida (+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.

RATE OF SALE	Aug 28-30 	Sept 11-13 	Sept 25-27 	% Change 	Same Weekend 2019 	YOY 
	30-Day ROS	30-Day ROS	30-Day ROS	From Previous	30-Day ROS	% Change
National	2.96	3.17	3.43	+8.2%	2.70	+27.0%
Florida	2.96	3.85	4.28	+11.2%	2.66	+60.9%
Georgia	2.35	2.89	3.25	+12.5%	1.39	+133.8%
Texas	5.12	5.90	6.30	+6.8%	3.90	+61.5%
Tennessee	2.96	3.73	4.06	+8.8%	1.97	+106.1%
South Carolina	2.36	3.13	3.16	+1.0%	1.37	+130.7%
New York	1.60	1.93	2.02	+4.7%	1.95	+3.6%
Illinois	2.40	3.10	3.10	—	2.68	+15.7%
Michigan	2.51	3.12	3.14	+0.6%	2.41	+30.3%
Minnesota	2.33	2.58	2.68	+3.9%	3.00	-10.7%
Nevada	3.38	3.52	3.70	+5.1%	3.79	-2.4%



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

CATEGORY & STYLE PERFORMANCE

Things were relatively flat in both Volume and Tap Share. Domestics dropped a point of Volume Share, falling to 53.5%, while seeing a slight dip in Tap Share (-0.5%) .

After seeing no movement in the Top 5 Styles for three consecutive periods, Euro Lagers pushed out Wheat/Hefeweizen, checking in at #5. Wheat/Hefe actually dropped to #7 overall, with Euro Ales holding the #6 position on the weekend. The top four styles remain unchanged.



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. Belgian Wit / White Ale
4. IPA
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

September 25-27

	Volume Share	Tap Share
		
Domestic	53.5%	25.9%
Craft	36.6%	59.7%
Import	9.9%	14.4%

Top 5 Styles

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

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!

