

On-Premise Status Report

October 9-11, 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 October 9-11 and compare that to our two previous reports - September 25-27 and September 11-13.

Cheers!
The BeerBoard Team



OPEN RATE

The Open Rate (locations open and pouring beer) held firm at 92% for the third consecutive period.

Current Open Rate



October 9-11

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%
Oct 9-11	92%

TAPS: AVERAGE # OF TAPS

After a steady climb over the past several reporting period, Average Number of Taps leveled both nationally and across many of the states tracked in this report. Nationally, the average per location checks in at 18. Florida (18) and New York (19) were the only two states to realize a one-tap rise, while Illinois, Michigan and Minnesota all dropped one tap for the period.

	Sept 11-13  Avg. # Taps	Sept 25-27  Avg. # Taps	Oct 9-11  Avg. # Taps	% Change  From Previous	Same Weekend 2019  Avg. # Taps	YOY  % Change
National	17	18	18	—	36	-50.0%
Florida	17	17	18	+5.9%	32	-43.8%
Georgia	16	16	16	—	42	-61.9%
Texas	17	18	18	—	32	-43.8%
Tennessee	17	18	18	—	40	-55.0%
South Carolina	17	17	17	—	43	-60.5%
New York	18	18	19	+5.6%	26	-26.9%
Illinois	16	16	15	-6.3%	28	-46.4%
Michigan	21	22	21	-4.5%	29	-27.6%
Minnesota	20	20	19	-5.0%	33	-42.4%
Nevada	20	20	20	—	31	-35.5%

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

TAPS: PERCENTAGE POURING

Similar to Average Number of Taps, the Percentage Pouring also leveled off this period (Oct 9-11). Nationally, taps pouring remained locked at 66%, while Illinois, Michigan, South Carolina and Tennessee were all flat. Movement among the additional states tracked varied no more than +/- 1.5%.

	Sept 11-13 	Sept 25-27 	Oct 9-11 	% Change 
	% Taps Pouring	% Taps Pouring	% Taps Pouring	From Previous
National	65%	66%	66%	—
Florida	70%	72%	73%	+1.4%
Georgia	67%	68%	67%	-1.5%
Texas	67%	69%	68%	-1.4%
Tennessee	59%	63%	63%	—
South Carolina	71%	73%	73%	—
New York	64%	67%	66%	-1.5%
Illinois	60%	62%	62%	—
Michigan	70%	71%	71%	—
Minnesota	73%	70%	69%	-1.4%
Nevada	75%	75%	74%	-1.3%

* *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

Coming off two straight periods of sizable growth, On-Premise Volume (per location) slumped Oct 9-11, down -5.6% from the previous period. Most states tracked here were down, led by Minnesota (-10.3%), Florida (-8.7%) and Texas (-7.4%). New York was the only state to see positive results, albeit nominally at +1.4%.

VOLUME CHANGE PER LOCATION	Compared to Sept 25-27	Compared to Same Weekend 2019
	 % Change	 % Change
National	-5.6%	-40%
Florida	-8.7%	-25%
Georgia	-4.3%	-37%
Texas	-7.4%	-32%
Tennessee	-5.0%	-34%
South Carolina	-0.2%	-44%
New York	+1.4%	-47%
Illinois	-3.4%	-54%
Michigan	-3.3%	-31%
Minnesota	-10.3%	-56%
Nevada	-6.1%	-44%

* Volume totals per location

VOLUME: RATE OF SALE

Rate of Sale also saw a decline for the weekend, down -5.5% from the previous period. Florida (-10.0%) saw the largest decline among states for ROS, followed by Minnesota (-6.7%) and Texas (-4.9%). South Carolina bucked the trend, climbing +4.4%.

RATE OF SALE	Sept 11-13  30-Day ROS	Sept 25-27  30-Day ROS	Oct 9-11  30-Day ROS	% Change  From Previous	Same Weekend 2019  30-Day ROS	YOY  % Change
National	3.17	3.43	3.24	-5.5%	2.59	+25.1%
Florida	3.85	4.28	3.85	-10.0%	2.41	+59.8%
Georgia	2.89	3.25	3.20	-1.5%	1.48	+116.2%
Texas	5.90	6.30	5.99	-4.9%	3.77	+58.9%
Tennessee	3.73	4.06	3.94	-3.0%	2.01	+96.0%
South Carolina	3.13	3.16	3.30	+4.4%	1.34	+146.3%
New York	1.93	2.02	2.05	+1.5%	1.84	+11.4%
Illinois	3.10	3.10	3.11	+0.3%	2.44	+27.5%
Michigan	3.12	3.14	3.05	-2.9%	2.42	+26.0%
Minnesota	2.58	2.68	2.50	-6.7%	2.90	-13.8%
Nevada	3.52	3.70	3.53	-4.6%	3.70	-4.6%

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

CATEGORY & STYLE PERFORMANCE

Volume and Tap Share were flat for a second consecutive period and the Top 5 Styles was unchanged.

September 11-13

Volume Share Tap Share



Domestic	54.5%	26.4%
Craft	35.9%	59.5%
Import	9.6%	14.1%

September 25-27

Volume Share Tap Share



Domestic	53.5%	25.9%
Craft	36.6%	59.7%
Import	9.9%	14.4%

October 9-11

Volume Share Tap Share



Domestic	53.5%	25.9%
Craft	36.4%	59.5%
Import	10.1%	14.6%

Top 5 Styles

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

Top 5 Styles

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

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!

