

On-Premise Status Report

October 23-25, 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 23-25 and compare that to our two previous reports - October 9-11 and September 25-27.

Cheers!
The BeerBoard Team



OPEN RATE

The Open Rate (locations open and pouring beer) is locked in at 92% for the fourth consecutive period, and has been steady between 91-92% since early August.

Current Open Rate



October 23-25







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%
Oct 23-25	92%

TAPS: AVERAGE # OF TAPS





For the third consecutive period, Average Number of Taps is holding firm at 18 taps per location nationally. Five states tracked were in a holding pattern from the previous period, while Michigan, Minnesota and Tennessee added one tap per location (on average), while Illinois and Texas both dropped one tap per.

	Sept 25-27 	Oct 9-11 	Oct 23-25 	% Change 	Same Weekend 2019 	YOY 
	Avg. # Taps	Avg. # Taps	Avg. # Taps	From Previous	Avg. # Taps	% Change
National	18	18	18	—	36	-50.0%
Florida	17	18	18	—	31	-42.0%
Georgia	16	16	16	—	42	-61.9%
Texas	18	18	17	-5.6%	31	-45.2%
Tennessee	18	18	19	+5.6%	40	-52.5%
South Carolina	17	17	17	—	32	-46.9%
New York	18	19	19	—	27	-29.6%
Illinois	16	15	14	-6.7%	28	-50.0%
Michigan	22	21	22	+4.8%	28	-21.4%
Minnesota	20	19	20	+5.3%	32	-37.5%
Nevada	20	20	20	—	31	-35.5%

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

TAPS: PERCENTAGE POURING

Percentage of Taps Pouring saw an ever-so-slight increase, climbing +1.5% nationally from last period. Six of the states tracked saw increases as well, though most were nominal. Minnesota was up +5.8% for the weekend, while Michigan was also up +2.8%. Illinois fell from 62% of taps pouring to 56% (-9.7%).

	Sept 25-27 	Oct 9-11 	Oct 23-25 	% Change 
	% Taps Pouring	% Taps Pouring	% Taps Pouring	From Previous
National	66%	66%	67%	+1.5%
Florida	72%	73%	72%	-1.4%
Georgia	68%	67%	68%	+1.5%
Texas	69%	68%	69%	+1.5%
Tennessee	63%	63%	63%	—
South Carolina	73%	73%	73%	—
New York	67%	66%	67%	+1.5%
Illinois	62%	62%	56%	-9.7%
Michigan	71%	71%	73%	+2.8%
Minnesota	70%	69%	73%	+5.8%
Nevada	75%	74%	75%	+1.4%

* *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

After a one-period decline, On-Premise Volume trended in the right direction, seeing a +7.9% climb this weekend (as compared to Oct 9-11). Most of the states tracked reset themselves, led by Minnesota, which saw a very healthy +36.7% climb. South Carolina (+10.6%) was also up double digits, while Michigan (+9.4%) fell just short of that club. Illinois and Georgia were down for the second consecutive period, falling -11.2% and -1.3%, respectively.

VOLUME
CHANGE
PER LOCATION

Compared to
Oct 9-11



% Change

Compared to
Same Weekend 2019









% Change

National	+7.9%	-36%
Florida	+6.6%	-24%
Georgia	-1.3%	-39%
Texas	+6.6%	-30%
Tennessee	+5.2%	-32%
South Carolina	+10.6%	-40%
New York	+3.0%	-44%
Illinois	-11.2%	-57%
Michigan	+9.4%	-30%
Minnesota	+36.7%	-48%
Nevada	+7.0%	-42%

* Volume totals per location

VOLUME: RATE OF SALE

Mirroring the Volume per Location, Rate of Sale also bounced back for the weekend, climbing +4.3% from the previous period. Minnesota (+16.8%) saw the biggest surge, while Florida (+6.5%), Texas (+5.2%) and Nevada (+4.8%) were also up. Illinois, which also saw a sharp fall in volume, was -8.7% for ROS on the weekend.



RATE OF SALE	Sept 25-27 	Oct 9-11 	Oct 23-25 	% Change 	Same Weekend 2019 	YOY 
	30-Day ROS	30-Day ROS	30-Day ROS	From Previous	30-Day ROS	% Change
National	3.43	3.24	3.38	+4.3%	2.60	+30.0%
Florida	4.28	3.85	4.10	+6.5%	2.45	+67.3%
Georgia	3.25	3.20	3.04	-5.0%	1.48	+105.4%
Texas	6.30	5.99	6.30	+5.2%	3.84	+64.1%
Tennessee	4.06	3.94	3.97	+0.8%	1.99	+99.5%
South Carolina	3.16	3.30	3.30	—	1.34	+146.3%
New York	2.02	2.05	2.02	-1.5%	1.84	+9.8%
Illinois	3.10	3.11	2.84	-8.7%	2.42	+17.4%
Michigan	3.14	3.05	3.16	+3.6%	2.43	+30.0%
Minnesota	2.68	2.50	2.92	+16.8%	2.95	-1.0%
Nevada	3.70	3.53	3.70	+4.8%	3.65	+1.4%

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



CATEGORY & STYLE PERFORMANCE

Volume and Tap Share were relatively flat for a third consecutive period, while the the Top 5 Styles again remained unchanged. Craft did iPhone almost a point in Volume (+0.8%) and Tap Share (+0.9%), taking most of the growth away from Imports.



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%

October 23-25

	Volume Share	Tap Share
		
Domestic	53.4%	25.6%
Craft	37.2%	60.4%
Import	9.4%	14.0%

Top 5 Styles

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

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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!

