

On-Premise Status Report

November 6-8, 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 November 6-8 and compare that to our two previous reports - October 23-25 and October 9-11.

Cheers!

The BeerBoard Team



OPEN RATE

The Open Rate (locations open and pouring beer) fell to 90% for the period tracked (November 6-8). This was the first decline since early August, when the Open Rate clocked in at 89%.

Current Open Rate



November 6-8







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%
Nov 6-8	90%

TAPS: AVERAGE # OF TAPS





For the first time since September, Average Number of Taps dropped a handle nationally and checked in at 17 taps per location. Illinois, due to the state's indoor dining ban, fell to just seven (7) taps per location, while Florida, Michigan, Minnesota and Tennessee were all down one tap per. Georgia, Nevada, New York, South Carolina and Texas all held firm from the previous period.

	Oct 9-11  Avg. # Taps	Oct 23-25  Avg. # Taps	Nov 6-8  Avg. # Taps	% Change  From Previous	Same Weekend 2019  Avg. # Taps	YOY  % Change
National	18	18	17	-5.6%	34	-50.0%
Florida	18	18	17	-5.6%	30	-43.3%
Georgia	16	16	16	—	43	-62.8%
Texas	18	17	17	—	32	-46.9%
Tennessee	18	19	18	-5.3%	41	-56.1%
South Carolina	17	17	17	—	31	-45.2%
New York	19	19	19	—	28	-32.1%
Illinois	15	14	7	-50.0%	28	-75.0%
Michigan	21	22	21	-4.5%	28	-25.0%
Minnesota	19	20	19	-5.0%	33	-42.4%
Nevada	20	20	20	—	32	-37.5%

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

TAPS: PERCENTAGE POURING

Percentage of Taps Pouring was down for the weekend, falling -3.0%. Nine of the 10 states tracked in this report were also down, most low-to-mid single digits. Illinois saw the biggest decline, falling -46.4% for the period. Nevada was the only state to realize an increase, climbing +1.3% for the weekend.



	Oct 9-11 	Oct 23-25 	Nov 6-9 	% Change 
	% Taps Pouring	% Taps Pouring	% Taps Pouring	From Previous
National	66%	67%	65%	-3.0%
Florida	73%	72%	72%	—
Georgia	67%	68%	66%	-2.9%
Texas	68%	69%	66%	-4.3%
Tennessee	63%	63%	62%	-1.6%
South Carolina	73%	73%	71%	-2.7%
New York	66%	67%	66%	-1.5%
Illinois	62%	56%	30%	-46.4%
Michigan	71%	73%	71%	-2.7%
Minnesota	69%	73%	68%	-6.8%
Nevada	74%	75%	76%	+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







On-Premise Volume continues to yo-yo. After trended in the right direction, seeing a +7.9% climb in the previous period, volume was -8.7% (as compared to Oct 23-25). Consistent with the theme, Illinois fell -47.9%, followed by Florida (-11.2%) and Michigan (-9.5%). Minnesota was the only state tracked to show a positive return on volume, climbing +2.5%.

VOLUME CHANGE PER LOCATION	Compared to Oct 23-25 	Compared to Same Weekend 2019 
	% Change	% Change
National	-8.7%	-40%
Florida	-11.2%	-31%
Georgia	-3.5%	-40%
Texas	-14.4%	-36%
Tennessee	-13.2%	-35%
South Carolina	-1.7%	-40%
New York	-3.4%	-43%
Illinois	-47.9%	-71%
Michigan	-9.5%	-37%
Minnesota	+2.5%	-47%
Nevada	-3.4%	-41%

* Volume totals per location

VOLUME: RATE OF SALE

As with Volume per Location, Rate of Sale was down for the period, after a climb Oct 23-25. This weekend saw ROS fall -11.2% nationally, while Texas (-17.5%), Minnesota (-14.7%) and Tennessee (-13.4%) saw significant declines among states tracked. Illinois, which remember dropped to seven taps per location, actually saw an increase in ROS, climbing +14.8% for the period.

RATE OF SALE	Oct 9-11  30-Day ROS	Oct 23-25  30-Day ROS	Nov 6-8  30-Day ROS	% Change  From Previous	Same Weekend 2019  30-Day ROS	YOY  % Change
National	3.24	3.38	3.00	-11.2%	2.61	+14.9%
Florida	3.85	4.10	3.59	-12.4%	2.31	+55.4%
Georgia	3.20	3.04	3.04	—	1.45	+109.7%
Texas	5.99	6.30	5.20	-17.5%	3.65	+42.3%
Tennessee	3.94	3.97	3.44	-13.4%	1.94	+77.3%
South Carolina	3.30	3.30	3.18	-3.6%	1.33	+139.1%
New York	2.05	2.02	1.89	-6.4%	1.83	+3.3%
Illinois	3.11	2.84	3.26	+14.8%	2.34	+39.3%
Michigan	3.05	3.16	2.74	-13.3%	2.34	+17.1%
Minnesota	2.50	2.92	2.49	-14.7%	2.96	-15.9%
Nevada	3.53	3.70	3.21	-13.2%	3.66	-12.3%

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

CATEGORY & STYLE PERFORMANCE

Imports siphoned away decent margins from Craft in both Volume and Tap Share for the period Imports climbed to 14.6% share in Volume and 17.2% in taps. Craft was down -5.0% in Volume and -2.6% in Taps, while Domestics were flat in both. The Top Five styles remained unchanged.

October 9-11

Volume Share Tap Share



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

October 23-25

Volume Share Tap Share



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

November 6-8

Volume Share Tap Share



Domestic	54.0%	25.9%
Craft	31.4%	56.9%
Import	14.6%	17.2%

Top 5 Styles

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

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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!

