On-Premise Status Report

November 20-22, 2020

BEERBOARD

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 its lowest percentage since June, when states began to reopen the On Premise. The Open Rate tumbled to 85% nationally, down from 90% in the prior period.

Current Open Rate

85%

November 20-22

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%
Nov 20-22	85%

TAPS: AVERAGE # OF TAPS

For the second consecutive period, Average Number of Taps dropped another handle nationally and checked in at 16 taps per location. New to the dining ban list this period were Michigan and Minnesota, joining Illinois, from the period prior. Michigan saw its taps fall from 21 two weeks ago to just 3 this period, while Minnesota plummeted from 19 to 9. Florida, Georgia, Texas, Tennessee and Nevada all saw no change.

	Oct 23-25 Avg. # Taps	**Nov 6-8** Avg. # Taps	**Nov 20-22** Avg. # Taps	**% Change** From Previous	**Same Weekend 2019** Avg. # Taps	**YOY** % Change
National	18	17	16	-5.9%	35	-54.3%
Florida	18	17	17	—	30	-43.3%
Georgia	16	16	16	—	42	-61.9%
Texas	17	17	17	—	33	-48.5%
Tennessee	19	18	18	—	40	-55.0%
South Carolina	17	17	16	-5.9%	32	-50.0%
New York	19	19	16	-15.8%	29	-44.8%
Illinois	14	7	5	-28.6%	27	-81.5%
Michigan	22	21	3	-85.7%	28	-89.3%
Minnesota	20	19	9	-52.6%	32	-71.9%
Nevada	20	20	20	—	33	-33.4%

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

TAPS: PERCENTAGE POURING

Based on these new state restrictions cropping up across the country, the Percentage of Taps Pouring took a downturn (-9.2%) and checked in at 59% overall. Michigan (8% pouring), Minnesota (33% pouring) and Illinois (18% pouring) saw massive declines for the period. Georgia was the only state tracked to see positive growth, climbing to 68% for the period.

	Oct 23-25	**Nov 6-8**	**Nov 20-22**	**% Change**
	% Taps Pouring	% Taps Pouring	% Taps Pouring	From Previous
National	67%	65%	59%	-9.2%
Florida	72%	72%	72%	—
Georgia	68%	66%	68%	+3.0%
Texas	69%	66%	66%	—
Tennessee	63%	62%	61%	-1.6%
South Carolina	73%	71%	69%	-2.8%
New York	67%	66%	55%	-16.7%
Illinois	56%	30%	18%	-40.0%
Michigan	73%	71%	8%	-88.7%
Minnesota	73%	68%	33%	-51.5%
Nevada	75%	76%	74%	-2.6%

* *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

Volume fell significantly for the period, down -12.9% as compared to the weekend of Nov. 6-8. Michigan (-95.1%), Illinois (-56.9%) and Minnesota (-40.2%) all took the brunt of their states' respective restrictions. Texas was the only state tracked to see an increase, albeit a nominal +1.2%.

VOLUME CHANGE PER LOCATION	**Compared to Nov 6-8**	**Compared to Same Weekend 2019**
	% Change	% Change
National	-12.9%	-50%
Florida	-8.7%	-39%
Georgia	-4.4%	-45%
Texas	+1.2%	-34%
Tennessee	-6.0%	-44%
South Carolina	-5.6%	-48%
New York	-32.1%	-62%
Illinois	-56.9%	-87%
Michigan	-95.1%	-91%
Minnesota	-40.2%	-72%
Nevada	-3.4%	-44%

** Volume totals per location*

VOLUME: RATE OF SALE

Rate of Sale, for so long a positive barometer during the reopening of the On Premise through the summer and fall, took a significant downturn for the second consecutive period. It fell -14.0% nationally, as compared to the weekend of Nov. 6-8.

RATE OF SALE	Oct 23-25 30-Day ROS	Nov 6-8 30-Day ROS	Nov 20-22 30-Day ROS	% Change From Previous	Same Weekend 2019 30-Day ROS	YOY % Change
National	3.38	3.00	2.58	-14.0%	2.54	+1.6%
Florida	4.10	3.59	3.25	-9.5%	2.24	+45.1%
Georgia	3.04	3.04	2.88	-5.3%	1.45	+98.6%
Texas	6.30	5.20	5.45	+4.8%	3.59	+51.8%
Tennessee	3.97	3.44	3.31	-3.8%	1.85	+78.9%
South Carolina	3.30	3.18	3.12	-1.9%	1.28	+143.8%
New York	2.02	1.89	1.62	-14.3%	1.85	-12.4%
Illinois	2.84	3.26	2.62	-19.6%	2.31	+13.4%
Michigan	3.16	2.74	0.80	-70.8%	2.34	-65.8%
Minnesota	2.92	2.49	2.83	+13.7%	2.93	-3.4%
Nevada	3.70	3.21	3.32	+3.4%	4.09	-18.8%

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

CATEGORY & STYLE PERFORMANCE

Imports saw another modest climb in Volume Share during the period, ticking up +0.9% to an overall 15.5% share. Craft fell (-1%) to 30.4%, while Domestics were flat at 54.1%. Tap Share and the Top Five styles remained unchanged.

October 23-25

	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. European Lagers

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
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November 20-22

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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!