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Dear Client:

BOSTON BEER, ONCE AGAIN, TAKES TOP HONORS IN LATEST TAMARRON

The yearly Tamarron Beverage Supplier Performance survey, in which distributors rank suppliers on a variety of topics, is here.

A total of 191 distributors responded to the latest survey (conducted April 1 to June 11). That's a drop from the amount of respondents in last year's survey (206). These distributors were asked 70 performance-based questions grouped into 13 functions; and the distributors rate the suppliers on a scale of 1 to 5.

Here's how the top five suppliers shook out in the latest survey:

1. Boston Beer took top honors for the second year in a row. Recall Boston had held the top spot for seven years running until getting knocked off by MillerCoors and Constellation in 2017. with an "overall average performance score" of 3.61, representing a .08 improvement over their 2018 score. Once again, Boston Beer received the highest

marks for the “relationship” benchmark, which distributors pegged at 91%. The three functions that Boston performed best at, according to distributors, were: leadership, field sales – communication, and field sales – annual planning.

2. Coming in the second spot was Constellation with an overall average score of 3.46, up from 3.43 in last year’s survey. Constellation’s top three functions were leadership, field sales – annual planning, and brand marketing.
3. MillerCoors came in third, posting a score of 3.36, which is a .09 improvement over last year. MillerCoors excels at national accounts – off premise, field sales – communication, and trade/retail marketing, according to distributors.
4. Mike’s Hard Lemonade locked down the fourth spot with a rating of 3.28, up from 3.17 last year. Mike’s also posted the highest marks for “performance” in the survey, which distributors marked at 91%. Mike’s three highest functions came in at leadership, field sales – annual planning, and finance/revenue management.
5. And A-B grabbed the fifth-best score of the 2019 survey, posting a 3.09, up 0.29 from last year, marking the largest gain posted by a supplier. Though we should note that A-B is only asking their “core distributors to respond” in the survey, per Tamarron. A-B’s highest scoring functions, according to these 44 “core” distributors? Field-sales communication, leadership, and brand marketing.

All in, eleven suppliers were rated in this year's survey (have to note that Pabst was not involved this go-round). Of the eleven, nine posted higher scores in the 2019 survey vs. 2018.

The only two to fall behind last year's score were Heineken USA and Sierra Nevada. HUSA, which held the ninth spot in this year's survey, saw its score fall by .05 points in 2019; while Sierra Nevada's score dropped by .04 from last year, placing them in the tenth spot in 2019. Tamarron noted, however, that "the overall declines experienced by HUSA and Sierra Nevada are partially attributable to the 5 questions that were struck/combined from the survey in 2019," which dealt with "One Voice, Price Promotion Post-Evaluation, Local Marketing Plan, Adequate POS Supply, and Multicultural Marketing."

Besides the rankings, one of the most interesting takeaways we pulled from the Survey was this: The average number of brands and SKUs in distributor shops are still increasing, but not at the rate we've become accustomed to.

The average number of brands jumped by 17 to 327 in this year's survey. And the average number of SKUs only increased by 7 to 1,385.

Then get this: "2019 was the first year for the average number of Suppliers to go down slightly (from 44 to 43)."

That stat jibes with one of the three notable comments from distributors shared by Tamarron...

“Some suppliers have improved their SKU Management, but there is still a long way to go to ensure the right SKUs are in the target markets/accounts.”

The other two:

- *Marketing needs to be expanded to include women and young LDAs with improved usage of platforms such as social/digital media.*
- *Collaboration/communication is key to better relationships and performance.*