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[www.nabca.org](http://www.nabca.org)

## NABCA Control State Datasets Overview

Statistics for Alcohol Management, SAM, is NABCA's flagship control state data offering. It comprises account level data, depletion data, and state dependent value-added datasets. There are five ways to gain access to SAM: subscribe to the full SAM Dataset, SAM-Lite Dataset, SAM Green Book Dataset, SAM-RAD Dataset or the SAM-RAD-Lite Dataset.

SAM-Lite and SAM Green Book are scaled-down subscriptions to SAM that are offered as alternatives to the full subscription. One user ID is provided per subscription, and additional ID's are priced at \$100 per month per ID. An ID can be used by more than one person, but not simultaneously.

SAM-Lite allows access to the same data as does SAM, but access is limited. SAM Green Book allows access to all SAM data except for account level. SAM-RAD provides proprietary (the subscriber's own products) retail account data via a 3<sup>rd</sup> party provider. SAM-RAD-Lite is a monthly emailed report detailing proprietary account data.

All SAM subscriptions are quarter-to-quarter, billed quarterly in advance, with no long-term commitment required. The price for a full SAM subscription as well as SAM-Lite includes account level data by SKU and all value-added datasets such as Green Books (state reports), Preliminary Monthly Reports (PMR), and warehouse activity data (SAM-IAM). Value-added datasets, but without account level data, are included in a SAM Green Book subscription.

SAM data are delivered monthly and daily, depending upon the dataset, and their subscriptions are billed quarterly in advance, which is different from other NABCA data and report offerings, which are delivered monthly or daily and billed quarterly in arrears. There is no charge for user training and hotline support. Please see the following for descriptions of the datasets included in the four SAM subscriptions.

- Account level data by state

These monthly datasets are often used by field sales personnel and market analysts. Sales by SKU by account for time periods of interest are provided. Five years of historical data plus the current year are available.

Account level data are used to track market penetration and store placements, to identify major accounts, to measure the effects of promotions, and to create competitive sets. Account level data includes pricing information by SKU for the time periods spanned by the data. All control states, except Michigan, New Hampshire, Pennsylvania, and Utah, report sales by calendar month. Michigan, New Hampshire, and Utah report sales based upon 4-4-5 week fiscal quarters, and Pennsylvania reports sales based upon 4-5-4 week fiscal quarters.



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- Daily Account Level Data: Available for all states except MI and VA (VA available August 2021). The content of these account level datasets is similar to the monthly account level data described above. There are two differences between the two: these datasets report daily sales by account versus monthly for those described above; and these include two years of data plus current year versus five years of data plus current year for the above.

- NC Account Level Data: (62 large boards in NC, on/off premise by store/account level)

Store and on-premise licensee level sales detail for 62 boards is included in this dataset. These boards account for 71% the state's total business and 80% of its on-premise volume.

- Green Book data: (depletion data)

Green Book data is the official “audited” monthly sales from each state. Analysts, as well as marketing and sales reps use these datasets, which include state level volumetric and pricing data by SKU. These data span the time period from January, 1999, to the present and are used to track brand performance within the control states as well as measuring regional product performance. The effects of pricing actions at the state level can be measured. The length and quality of this series makes it ideally suited for trending.

- SAM IAM: (inventory analysis and management data)

SAM IAM contains SKU level daily warehouse activity data that are updated each morning. With few exceptions, this dataset contains the prior workday’s inventory positions as well as receipts, withdrawals, and adjustments.

- PMR Models: (Preliminary Monthly Reports)

PMR data are an excellent early source for information from which to create an end-of-month FLASH report. Models are created and made available for SAM users upon receipt of the data from which a state’s Green Book will be prepared. This dataset contains sales by SKU at the state level for all products except those that are new in the current month

- PA SLO Data (PA special liquor orders with account-level detail)



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- PA Weekly On- and Off-Premise Sales and Pricing Data

Pennsylvania's sales reporting periods do not overlay its week-based SPA promotional calendar. This dataset allows users to measure the effects of pricing actions by reporting weekly 9-liter case sales and prices

- Ohio Store Sales: (Monthly total sales by agency to consumers and on-prem accts with no account level detail)

Typically, sales associated with a retail outlet include consumer take-aways only. Sales to on-premise licensees are not reported in order to eliminate double counting these sales, which are reported by on-premise account. This model shows retail outlet total sales, which comprise consumer take-aways as well as sales to on-premise licensees.

- Alabama Store Inventory Model (Daily snapshot of store inventories and rolling twenty-eight days of sales)

This model is built each day and reports, by store, product inventory by SKU as well as rolling twenty-eight days of sales to consumers and on-premise licensees by account. Warehouse depletions to independent retailers are also included.

Additional Notes:

- Oregon Account Level: The sum of Daily Sales files, not necessarily a match with Oregon's audited Greenbook data
- Montgomery County Store Level: Store level sales not broken down by on/off premise (on-prem licensees can buy through the stores)
- Maine BABLO: Maine on premise account purchases. This is a separate model built from Maine Account level.

Other information about the control states:

- There are eighteen major control jurisdictions (Alabama, Idaho, Iowa, Maine, Montgomery County Maryland, Michigan, Mississippi, Montana, New Hampshire, North Carolina, Ohio, Oregon, Pennsylvania, Utah, Vermont, Virginia, West Virginia, Wyoming) in the United States that account for nearly 24% of the beverage alcohol industry's business.
- Six control jurisdictions (Montgomery County Maryland, Mississippi, New Hampshire, Pennsylvania, Utah, Wyoming) are the sole wholesalers of wines and spirits.



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- Eleven control jurisdictions (Alabama, Idaho, Montgomery County Maryland, New Hampshire, North Carolina, Ohio, Oregon, Pennsylvania, Utah, Vermont, Virginia) have retail outlets; seven (Iowa, Maine, Michigan, Mississippi, Montana, West Virginia, Wyoming) do not have retail outlets and are wholesalers only.
- Twelve jurisdictions (Alabama, Idaho, Maine, Montgomery County Maryland, New Hampshire, North Carolina, Ohio, Oregon, Pennsylvania, Utah, Vermont, Virginia) set retail prices for products sold within their geographical boundaries; the other six establish wholesale prices for products sold to retailers doing business with the states.
- Account level (retail and on-premise licensee) monthly sales data are available for fifteen control jurisdictions – Alabama, Idaho, Maine, Michigan, Mississippi, Montgomery County MD, New Hampshire, North Carolina, Ohio, Oregon, Pennsylvania, Utah, Vermont, Virginia, Wyoming.
- Sales data from Iowa, Maine, Montana, and West Virginia are interpreted as warehouse depletions to retailers who sell to consumers and on-premise licensees.
- Historical pricing information for products sold in the control states is available.

# NABCA DATA-BY THE NUMBERS

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## THERE ARE EIGHTEEN CONTROL JURISDICTIONS

Alabama, Idaho, Iowa, Maine, Montgomery County, Maryland, Michigan, Mississippi, Montana, New Hampshire, North Carolina, Ohio, Oregon, Pennsylvania, Utah, Vermont, Virginia, West Virginia, and Wyoming in the United States that account for nearly 23% of the beverage alcohol industry's business.

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## SIX CONTROL WHOLESALE

Montgomery County Maryland, Mississippi, New Hampshire, Pennsylvania, Utah, and Wyoming are the sole wholesalers of wines and spirits.

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## ELEVEN CONTROL RETAIL & WHOLESALE

Alabama, Idaho, Montgomery County Maryland, New Hampshire, North Carolina, Ohio, Oregon, Pennsylvania, Utah, Vermont, and Virginia have retail or agency outlets. Reported sales in these jurisdictions are direct sales to consumers (retail) and sales to licensees (wholesale).

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## MARKETS PROVIDE ON-PREMISE ACCOUNT DATA

On-Premise account data is available in all control markets except for Iowa, Montana and West Virginia.

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## DAILY DATA

As of January 2021, all states except Michigan and Virginia provide daily account level data.

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## DATA ACCURACY

Cowen Inc., cites our data as #1 "...we view NABCA more reliable given it captures both on- and off-premise trends." The Cowen Insight, March 5, 2018.

15,500

RETAIL  
ACCOUNTS

76,000

LICENSEE  
ACCOUNTS

59,200,000

9-LITER CASES  
OF SPIRITS



	Full SAM Access	SAM-Lite Access	SAM Green Book	Standard Data Set	SAM RAD-Lite
ProDiver	✓	✓	✓		
DivePort	✓	✓	✓		
Account Level	✓	✓		✓	✓
Competitor Data	✓	✓		✓	
Green Book Data	✓	✓	✓	✓	
Inventory Data	✓				
Daily Data	✓			✓	
Monthly Data	✓	✓	✓	✓	✓
Quarterly Data	✓	✓	✓		
Report Only					✓

## FULL SAM SUBSCRIPTION

The full SAM subscription includes access to all details available from a state including Greenbook, and account level data and inventory. Access is available through ProDiver, DivePort and Standard Data Sets. Subscribe to 10 markets and receive the remaining eight at no charge.

## SAM-LITE

SAM-Lite provides limited access to Greenbook and account level data through DivePort only.

## SAM GREEN BOOK

SAM Greenbook includes product level data from January 1999 until present. Access is available through ProDiver, DivePort or Standard Data Set.

## STANDARD DATA SET

Standard Data Sets are available either directly via SFTP or through 3rd party data providers. Pricing is subject to subscription level and can include Greenbook and Account Level.

## SAM RAD-LITE (RAD = Retail Account Data)

SAM RAD-Lite is an excel file emailed at the close of each markets monthly sales. Data includes CM/PYM, YTD/PYTD and 12M/PY12M in bottles or cases. Subscriber's SKUs only.