

On-Premise Status Report

December 4-6, 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 December 4-6 and compare that to our two previous reports - November 20-22 and November 6-8.

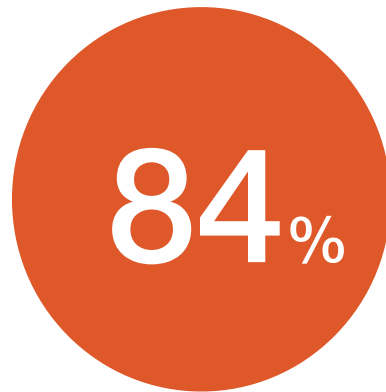
Cheers!
The BeerBoard Team



OPEN RATE

Following a significant fall the prior period, the Open Rate (locations open and pouring beer) ticked down one point to 84% for December 4-6.

Current Open Rate



December 4-6







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%
Dec 4-6	84%

TAPS: AVERAGE # OF TAPS





Average Number of Taps stopped a two-period slide and held firm at 16 handles per location nationally. Florida averaged 18 taps per location, while Georgia, New York, South Carolina and Texas all checked in with a repeat average of 16 handles per. Illinois, Michigan, Minnesota and Nevada are still wading through new restrictions, causing fluctuations in their average.

	Nov 6-8  Avg. # Taps	Nov 20-22  Avg. # Taps	Dec 4-6  Avg. # Taps	% Change  From Previous	Same Weekend 2019  Avg. # Taps	YOY  % Change
National	17	16	16	—	36	-55.6%
Florida	17	17	18	+5.9%	31	-41.9%
Georgia	16	16	16	—	43	-62.8%
Texas	17	17	17	—	34	-50.0%
Tennessee	18	18	17	-5.6%	42	-59.5%
South Carolina	17	16	16	—	31	-48.4%
New York	19	16	16	—	30	-46.7%
Illinois	7	5	6	+20.0%	29	-79.3%
Michigan	21	3	4	+33.3%	27	-85.2%
Minnesota	19	9	4	-55.6%	31	-87.1%
Nevada	20	20	18	-10.0%	34	-47.1%

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

TAPS: PERCENTAGE POURING

Percentage of Taps Pouring also stemmed the tide and held solid at 59%, the same as the prior period. Tennessee (+3.0%), New York (+1.8%) and South Carolina (+1.4%) saw nominal growth. Managing heavy restrictions, Minnesota (-54.5%) and Nevada (-9.5%) saw significant declines.

	Nov 6-8 	Nov 20-22 	Dec 4-6 	% Change 
	% Taps Pouring	% Taps Pouring	% Taps Pouring	From Previous
National	65%	59%	59%	—
Florida	72%	72%	72%	—
Georgia	66%	68%	68%	—
Texas	66%	66%	68%	—
Tennessee	62%	61%	59%	+3.0%
South Carolina	71%	69%	70%	+1.4%
New York	66%	55%	54%	+1.8%
Illinois	30%	18%	25%	+38.9%
Michigan	71%	8%	12%	+50.0%
Minnesota	68%	33%	15%	-54.5%
Nevada	76%	74%	67%	-9.5%

* *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 saw a positive return for December 4-6, climbing +4.4% nationally. New York (+12.8%), Tennessee (+9.1%) and Florida (+6.4%) saw healthy growth for the period. Nevada, which introduced new restrictions for the on-premise, declined -31.6%.

**VOLUME
CHANGE
PER LOCATION**

**Compared to
Nov 20-22**



% Change

**Compared to
Same Weekend 2019**








% Change

National	+4.4%	-45%
Florida	+6.4%	-35%
Georgia	+1.9%	-43%
Texas	+4.2%	-30%
Tennessee	+9.1%	-38%
South Carolina	+0.8%	-48%
New York	+12.8%	-55%
Illinois	+54.8%	-74%
Michigan	+147.8%	-70%
Minnesota	-44.8%	-84%
Nevada	-31.6%	-53%

* Volume totals per location

VOLUME: RATE OF SALE

Following a month-long downturn, Rate of Sale saw positive trends both nationally and in states tracked for the period. Nationally, ROS was +5.0% for December 4-6. New York (+9.9%) and Tennessee (+9.4%) saw healthy bumps. Illinois, Michigan, Minnesota and Nevada are still wading through new restrictions, causing major fluctuations in their data.

RATE OF SALE	Nov 6-8  30-Day ROS	Nov 20-22  30-Day ROS	Dec 4-6  30-Day ROS	% Change  From Previous	Same Weekend 2019  30-Day ROS	YOY  % Change
National	3.00	2.58	2.71	+5.0%	2.23	+21.5%
Florida	3.59	3.25	3.37	+3.7%	2.04	+65.2%
Georgia	3.04	2.88	2.93	+1.7%	1.32	+122.0%
Texas	5.20	5.45	5.36	-1.7%	3.50	+53.1%
Tennessee	3.44	3.31	3.62	+9.4%	1.66	+118.1%
South Carolina	3.18	3.12	3.03	-2.9%	1.18	+156.8%
New York	1.89	1.62	1.78	+9.9%	1.66	+7.2%
Illinois	3.26	2.62	3.10	+18.3%	2.00	+55.0%
Michigan	2.74	0.80	1.56	+95.0%	2.07	-24.6%
Minnesota	2.49	2.83	3.47	+22.6%	2.68	+29.5%
Nevada	3.21	3.32	2.48	-25.3%	3.82	-35.1%

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

CATEGORY & STYLE PERFORMANCE

In Volume share, Domestics saw a very modest bump of +1.4% for the period of December 4-6. It siphoned that growth away from Imports (-0.7%), which had previously ticked up slightly over the prior two period, and Craft (-0.6%). Tap Share was flat, while the Top Five styles remained unchanged again (and has not deviated from the current lineup since early September).

November 6-8

Volume Share Tap Share



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

November 20-22

Volume Share Tap Share



Domestic	54.1%	25.9%
Craft	30.4%	56.8%
Import	15.5%	17.3%

December 4-6

Volume Share Tap Share



Domestic	55.5%	26.1%
Craft	29.8%	56.7%
Import	14.8%	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!

