

On-Premise Status Report

December 18-20, 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 18-20 and compare that to our two previous reports - December 4-6 and November 20-22.

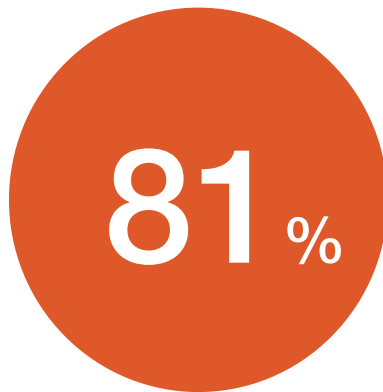
Cheers!
The BeerBoard Team



OPEN RATE

The unfortunate downward trend of Open Rate (locations open and pouring beer) continues. For the period of December 18-20, just 81% of locations were open active. This is the lowest total nationally since mid-June 2020.

Current Open Rate



December 18-20







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%
Dec 18-20	81%

TAPS: AVERAGE # OF TAPS





Average Number of Taps ticked down one handle nationally, checking in with an average of 15 per location. Nevada and Texas both added one handle each, coming in at 19 and 18, respectively. Florida, Georgia, New York, Tennessee and South Carolina all held firm at the their respective totals from the prior period. Illinois (5), Michigan (6) and Minnesota (4) all remain on heavy operational restrictions.

	Nov 20-22 	Dec 4-6 	Dec 18-20 	% Change 	Same Weekend 2019 	YOY 
	Avg. # Taps	Avg. # Taps	Avg. # Taps	From Previous	Avg. # Taps	% Change
National	16	16	15	-6.3%	34	-55.9%
Florida	17	18	18	—	32	-43.8%
Georgia	16	16	16	—	42	-61.9%
Texas	17	17	18	+5.9%	33	-45.5%
Tennessee	18	17	17	—	44	-61.4%
South Carolina	16	16	16	—	32	-50.0%
New York	16	16	16	—	31	-48.4%
Illinois	5	6	5	-16.7%	30	-83.3%
Michigan	3	4	6	+50.0%	28	-78.6%
Minnesota	9	4	4	—	30	-86.7%
Nevada	20	18	19	+5.6%	33	-42.4%

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

TAPS: PERCENTAGE POURING

For the third consecutive period, Percentage of Taps Pouring held solid at 59%. Texas grew for the second straight period, with 69% of its taps pouring. Florida, Nevada and Tennessee also saw nominal growth for the period. Michigan, which was at a low of 8% the weekend of November 20-22, has climbed back to 20% of taps pouring.

	Nov 20-22	Dec 4-6	Dec 18-20	% Change
				
	% Taps Pouring	% Taps Pouring	% Taps Pouring	From Previous
National	59%	59%	59%	—
Florida	72%	72%	73%	+1.4%
Georgia	68%	68%	68%	—
Texas	66%	68%	69%	+1.5%
Tennessee	61%	59%	61%	+3.4%
South Carolina	69%	70%	70%	—
New York	55%	54%	54%	—
Illinois	18%	25%	20%	-20.0%
Michigan	8%	12%	20%	+66.7%
Minnesota	33%	15%	15%	—
Nevada	74%	67%	69%	+3.0%

* *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 growth for the second consecutive period nationally (+9.6%), more than doubling its return for December 4-6 (+4.4%). South Carolina (+13.6%), Georgia (+12.8%), Nevada (+11.1%), New York (+8.2%) and Texas (+8.0%) all saw sizable improvements in volume per location. Michigan, which is navigating strict on-premise restrictions, saw a +91.2% climb after bottoming out in November.

VOLUME CHANGE PER LOCATION

Compared to Dec 4-6



% Change

Compared to Same Weekend 2019









% Change

National	+9.6%	-42%
Florida	+2.6%	-34%
Georgia	+12.8%	-40%
Texas	+8.0%	-28%
Tennessee	+0.4%	-37%
South Carolina	+13.6%	-42%
New York	+8.2%	-51%
Illinois	-2.3%	-75%
Michigan	+91.2%	-67%
Minnesota	—	-83%
Nevada	+11.1%	-48%

* Volume totals per location

VOLUME: RATE OF SALE

Rate of Sale continues to see growth nationally for the third straight period, climbing +9.6% over Dec 4-6. Many of the states tracked also saw healthy growth, with South Carolina (+13.9%), Georgia (+8.9%) and Texas (+6.0%) leading the way. There are also positive signs in Michigan (+42.9%) and Minnesota (+13.0%), two states working through heavy restrictions.



RATE OF SALE	Nov 20-22 	Dec 4-6 	Dec 18-20 	% Change 	Same Weekend 2019 	YOY 
	30-Day ROS	30-Day ROS	30-Day ROS	From Previous	30-Day ROS	% Change
National	2.58	2.71	2.97	+9.6%	2.17	+36.9%
Florida	3.25	3.37	3.47	+3.0%	2.00	+73.5%
Georgia	2.88	2.93	3.19	+8.9%	1.33	+139.9%
Texas	5.45	5.36	5.68	+6.0%	3.43	+65.6%
Tennessee	3.31	3.62	3.56	-1.7%	1.63	+118.4%
South Carolina	3.12	3.03	3.45	+13.9%	1.17	+194.9%
New York	1.62	1.78	1.88	+5.6%	1.39	+35.3%
Illinois	2.62	3.10	3.00	-3.2%	1.97	+52.3%
Michigan	0.80	1.56	2.23	+42.9%	2.07	+7.7%
Minnesota	2.83	3.47	3.92	+13.0%	2.67	+46.8%
Nevada	3.32	2.48	2.61	+5.2%	3.77	-30.8%

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

CATEGORY & STYLE PERFORMANCE

In Volume share, Domestics picked a full point for the second consecutive period, climbing to 56.5%. Craft slipped back 1.2% to 28.6% overall, while Imports ticked up ever-so-slightly to 14.9%. The big news is there was a change in the Top 5 Styles, the first since September. Europeans Ales entered the rankings, coming in at #5 and bumping out European Lagers.



November 20-22

	Volume Share	Tap Share
		
Domestic	54.1%	25.9%
Craft	30.4%	56.8%
Import	15.5%	17.3%

Top 5 Styles

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



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

December 18-20

	Volume Share	Tap Share
		
Domestic	56.5%	26.1%
Craft	28.6%	56.7%
Import	14.9%	17.2%

Top 5 Styles

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

ABOUT BEERBOARD

BeerBoard is a leading technology company enabling the food & beverage industry to make data-driven decisions about its bar business. It manages over \$1 billion in retail draft beer sales and 60,000 products through its industry-leading solution. The company's patented digital platform captures, analyzes, and reports real-time data related to bar performance, brand insights and inventory. Built for retailers, brewers and distributors, the versatile technology is easily operated from a single dashboard, and it has streamlined operations and increased top and bottom line revenue all over the United States.

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!

