

On-Premise Status Report

December 31, 2020 - January 3, 2021



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 New Year's Eve (Dec 31, 2020) and extend through the weekend to January 3, 2021. We compare this to our two previous reports - December 18-20 and December 4-6, 2020.

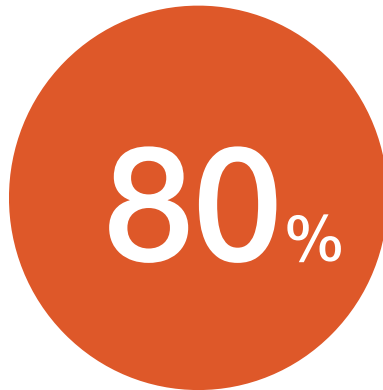
Cheers!
The BeerBoard Team



OPEN RATE

The Open Rate (locations open and pouring beer) ticked down another point for the New Years weekend, checking in at 80% nationally. Even though it dropped just one point, it marks the fifth consecutive period of decline for Open Rate.

Current Open Rate



Dec 31 - Jan 3







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%
Dec 31 - Jan 3	80%

TAPS: AVERAGE # OF TAPS





Average Number of Taps held firm from the prior period, checking in with an average of 15 per location. Among the states tracked, Michigan, Minnesota and Tennessee all remained the same, while every other dropped handles.

	Dec 4-6 	Dec 18-20 	Dec 31-Jan 3 	% Change 	Same Weekend 2019 	YOY 
	Avg. # Taps	Avg. # Taps	Avg. # Taps	From Previous	Avg. # Taps	% Change
National	16	15	15	—	30	-50.0%
Florida	18	18	17	-5.6%	31	-45.2%
Georgia	16	16	15	-6.3%	40	-62.5%
Texas	17	18	17	-5.6%	34	-50.0%
Tennessee	17	17	17	—	45	-62.2%
South Carolina	16	16	15	-6.3%	31	-51.6%
New York	16	16	14	-12.5%	30	-53.3%
Illinois	6	5	4	-20.0%	28	-85.7%
Michigan	4	6	6	—	29	-79.3%
Minnesota	4	4	4	—	31	-87.1%
Nevada	18	19	18	-5.3%	32	-43.8%

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

TAPS: PERCENTAGE POURING

Percentage of Taps Pouring dropped to 56%, falling from 59% the prior period. Tennessee (+1.7%) saw an ever-so-slight bump on the holiday weekend, while Michigan grew to 21% of taps pouring after seeing record lows due to state restrictions. Every other state tracked saw a decline, including Minnesota which is down to just 12% of taps pouring.

	Dec 4-6 	Dec 18-20 	Dec 31-Jan 3 	% Change 
	% Taps Pouring	% Taps Pouring	% Taps Pouring	From Previous
National	59%	59%	56%	-5.1%
Florida	72%	72%	69%	-4.2%
Georgia	68%	68%	65%	-4.4%
Texas	66%	68%	65%	-4.2%
Tennessee	61%	59%	60%	+1.7%
South Carolina	69%	70%	66%	-5.7%
New York	55%	54%	47%	-12.9%
Illinois	18%	25%	17%	-32.0%
Michigan	8%	12%	21%	+75.0%
Minnesota	33%	15%	12%	-20.0%
Nevada	74%	67%	66%	-1.5%

* *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

Source: Experian

Coming off three consecutive periods of growth, Volume took a tumble over the holiday weekend, falling -18.7%. Texas (-23.8%), Georgia (-21.8%) and Such Carolina (-20.9%) saw big declines among the states tracked.

VOLUME
CHANGE
PER LOCATION

Compared to
Dec 18-20



% Change

Compared to
Same Weekend 2019









% Change

National	-18.7%	-46%
Florida	-18.1%	-36%
Georgia	-21.8%	-43%
Texas	-23.8%	-35%
Tennessee	-11.1%	-34%
South Carolina	-20.9%	-46%
New York	-18.0%	-52%
Illinois	-22.0%	-79%
Michigan	-13.0%	-67%
Minnesota	-21.8%	-85%
Nevada	-1.9%	-46%

* Volume totals per location

VOLUME: RATE OF SALE

After three straight periods of growth, Rate of Sale hit the pause button and was down -15.2% for the weekend. Michigan (-18.8%), Texas (-18.5%), Georgia (-17.6%), South Carolina (-15.9%) and Florida (-14.9%) all saw noticeable declines. Nevada (+2.7%) was the only state tracked with showing a gain on the weekend.



RATE OF SALE	Dec 4-6 	Dec 18-20 	Dec 31-Jan 3 	% Change 	Same Weekend 2019 	YOY 
	30-Day ROS	30-Day ROS	30-Day ROS	From Previous	30-Day ROS	% Change
National	2.71	2.97	2.52	-15.2%	1.95	+29.2%
Florida	3.37	3.47	2.95	-14.9%	1.82	+62.1%
Georgia	2.93	3.19	2.63	-17.6%	1.17	+124.8%
Texas	5.36	5.68	4.63	-18.5%	3.19	+45.1%
Tennessee	3.62	3.56	3.30	-7.3%	1.51	+118.5%
South Carolina	3.03	3.45	2.90	-15.9%	1.06	+173.6%
New York	1.78	1.88	1.73	-7.9%	1.23	+40.7%
Illinois	3.10	3.00	2.65	-11.7%	1.75	+51.4%
Michigan	1.56	2.23	1.81	-18.8%	1.83	-1.1%
Minnesota	3.47	3.92	3.65	-6.9%	2.35	+55.3%
Nevada	2.48	2.61	2.68	+2.7%	3.30	-13.9%

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



CATEGORY & STYLE PERFORMANCE

In Volume share, Domestics (+0.8%) and Craft (+0.7%) both saw nominal gains, siphoning that 1.5% total away from Imports. Domestics were also up in Tap Share, seeing a +0.9% bump. Top 5 Styles remained unchanged for the third consecutive period.



December 4-6

	Volume Share	Tap Share
		
Domestic	55.5%	26.1%
Craft	29.8%	56.7%
Import	14.8%	17.2%

December 18-20

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

Dec 31-Jan 3

	Volume Share	Tap Share
		
Domestic	57.3%	27.0%
Craft	29.3%	56.3%
Import	13.4%	16.7%

Top 5 Styles

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

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ABOUT BEERBOARD

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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!

