

On-Premise Status Report

January 28-31, 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 January 28-31, 2021 and compare this to our two previous reports - January 14-17 and December 31-January 3.

Cheers!
The BeerBoard Team



OPEN RATE

Going back to early November, Open Rate (locations open and pouring beer) was on a steady decline before hitting a low of 80% over New Years weekend. This weekend (Jan 28-31), Open Rate clocked in at 90%, climbing five points from the previous period, and seeing its highest figure since Nov 6-8, 2020.

Current Open Rate



January 28-31

Weekly Rates



May 8-10	16%	Oct 9-11	92%
May 22-25	45%	Oct 23-25	92%
June 5-7	66%	Nov 6-8	90%
June 19-21	84%	Nov 20-22	85%
July 3-5	86%	Dec 4-6	84%
July 17-19	91%	Dec 18-20	81%
July 31-Aug 2	89%	Dec 31 - Jan 3	80%
Aug 14-16	91%	Jan 14-17	85%
Aug 28-30	91%	Jan 28-31	90%
Sept 11-13	92%		
Sept 25-27	92%		

TAPS: AVERAGE # OF TAPS

Nationally, Average Number of Taps held steady at 16 taps per location. Among the states tracked, six of the 10 also held steady from the prior period. Illinois added five taps to climb back to 10 pouring, while Michigan (7) and Minnesota (19) both added one tap each. Georgia was the only state to see a decrease, dropping one handle to checking in at 15 pouring.

	Dec 31-Jan 3  Avg. # Taps	Jan 14-17  Avg. # Taps	Jan 28-31  Avg. # Taps	% Change  From Previous	Same Weekend 2020  Avg. # Taps	YOY  % Change
National	15	16	16	—	32	-50.0%
Florida	17	17	17	—	33	-48.5%
Georgia	15	16	15	-6.3%	42	-64.3%
Texas	17	17	17	—	32	-46.9%
Tennessee	17	17	17	—	42	-59.5%
South Carolina	15	15	15	—	30	-50.0%
New York	14	16	16	—	32	-50.0%
Illinois	4	5	10	+100.0%	28	-64.3%
Michigan	6	6	7	+16.7%	31	-77.4%
Minnesota	4	18	19	+5.6%	29	-34.5%
Nevada	18	18	18	—	32	-43.8%

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

TAPS: PERCENTAGE POURING

Percentage of Taps Pouring saw a slight decrease, falling two points to 58% over the period. Illinois continues its rebounding, climbing to 41% of taps pouring, up from 22% the prior period. Michigan also grew +10%, while Minnesota (+3.1%) and South Carolina (+1.5%) were up, nominally.

	Dec 31-Jan 3 	Jan 14-17 	Jan 28-31 	% Change 
	% Taps Pouring	% Taps Pouring	% Taps Pouring	From Previous
National	56%	60%	58%	-3.3%
Florida	69%	72%	70%	-2.8%
Georgia	65%	66%	64%	-3.0%
Texas	65%	68%	67%	-1.5%
Tennessee	60%	61%	61%	—
South Carolina	66%	68%	67%	+1.5%
New York	47%	55%	55%	—
Illinois	17%	22%	41%	+86.4%
Michigan	21%	20%	22%	+10.0%
Minnesota	12%	65%	67%	+3.1%
Nevada	66%	66%	65%	-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



Coming off a solid weekend the prior period, Volume slowed a bit and fell -9.9% over the period (January 28-31). On script, Illinois was up a healthy +72.9%, while New York also climbed double-digits (+10%). Minnesota was up +4.9% on the period as well.

**VOLUME
CHANGE
PER LOCATION**

**Compared to
Jan 14-17**



% Change

**Compared to
Same Weekend 2020**



% Change

National	-9.9%	-44%
Florida	-14.4%	-34%
Georgia	-7.8%	-43%
Texas	-6.3%	-33%
Tennessee	-10.2%	-34%
South Carolina	-9.3%	-47%
New York	+10.0%	-45%
Illinois	+72.9%	-65%
Michigan	-31.4%	-65%
Minnesota	+4.9%	-67%
Nevada	-14.6%	-45%

* Volume totals per location

VOLUME: RATE OF SALE

Coming off a one-period increase, Rate of Sale dipped slightly nationally, falling -8.3% for the weekend. New York (+8.4%) and Minnesota (+3.0%) were the only two states to see an increase on the period.

RATE OF SALE	Dec 31-Jan 3  30-Day ROS	Jan 14-17  30-Day ROS	Jan 28-31  30-Day ROS	% Change  From Previous	Same Weekend 2020  30-Day ROS	YOY  % Change
National	2.52	2.88	2.64	-8.3%	2.07	+27.5%
Florida	2.95	3.67	3.19	-13.1%	2.09	+52.6%
Georgia	2.63	2.70	2.55	-5.6%	1.22	+109.0%
Texas	4.63	5.46	5.19	-4.9%	3.31	+56.8%
Tennessee	3.30	3.54	3.20	-9.6%	1.62	+97.5%
South Carolina	2.90	2.91	2.69	-7.6%	1.14	+136.0%
New York	1.73	1.66	1.80	+8.4%	1.34	+34.3%
Illinois	2.65	3.40	2.88	-15.3%	1.88	+53.2%
Michigan	1.81	2.35	1.53	-34.9%	1.98	-22.7%
Minnesota	3.65	2.69	2.77	+3.0%	2.57	+7.8%
Nevada	2.68	2.75	2.39	-13.1%	3.64	-34.3%

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

CATEGORY & STYLE PERFORMANCE

In Volume share, Craft grew for the second consecutive period, climbing +1.5% (after a +2.8% bump Jan 14-17) to check in at 32.9%. Imports also took a positive step, up +0.5% to 14.7%), while Domestics dropped two full points to come in a 52.4%. Tap Share was relatively flat again for the period, and the Top Five Styles remained unchanged.

Dec 31-Jan 3

Volume Share Tap Share



Domestic	56.5%	26.1%
Craft	28.6%	56.7%
Import	14.9%	17.2%

January 14-17

Volume Share Tap Share



Domestic	54.4%	26.3%
Craft	31.4%	57.0%
Import	14.2%	16.7%

January 28-31

Volume Share Tap Share



Domestic	52.4%	26.5%
Craft	32.9%	56.6%
Import	14.7%	16.9%

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!

