

# On-Premise Status Report

February 25-28, 2021



# OVERVIEW

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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 February 25-28, 2021, and compare this to our two previous reports - February 11-14 and January 28-31.

Cheers!  
The BeerBoard Team



# OPEN RATE

Open Rate (locations open and pouring beer) has come all the way back and checks in at 92% for the period (Feb 25-28) and ties the high-water mark since BeerBoard began tracking this data in early May 2020.

## Current Open Rate



February 25-28







## 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%	Feb 11-14	90%
Sept 25-27	92%	Feb 25-28	92%

# TAPS: AVERAGE # OF TAPS





Nationally, Average Number of Taps added one tap for the period (Feb 25-28) to climb to 17 per locations. Six of the 10 states tracked added at least one tap, led by Texas, which added three taps to return to 18 per location. Michigan, which has skyrocketed back (from just seven taps a month ago) to land at 20 this period, and Tennessee (18) both added two taps. Illinois (13), Nevada (19) and New York (18) added one each.

	Jan 28-31  Avg. # Taps	Feb 11-14  Avg. # Taps	Feb 25-28  Avg. # Taps	% Change  From Previous	Same Weekend 2020  Avg. # Taps	YOY  % Change
National	16	16	17	+6.3%	34	-50.0%
Florida	17	18	18	—	35	-48.6%
Georgia	15	16	16	—	40	-60.0%
Texas	17	15	18	+20.0%	32	-43.8%
Tennessee	17	16	18	+12.5%	42	-57.1%
South Carolina	15	16	16	—	30	-46.7%
New York	16	17	18	+5.9%	34	-47.1%
Illinois	10	12	13	+8.3%	28	-53.0%
Michigan	7	18	20	+11.1%	31	-35.5%
Minnesota	19	19	19	—	31	-38.7%
Nevada	18	18	19	+5.6%	33	-42.4%

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

# TAPS: PERCENTAGE POURING

For the second consecutive period, Percentage of Taps Pouring saw an increase, this time up four points to check in at 64% pouring nationally. Texas paced the field, climbing back from a dip due to the winter storm two weeks ago, growing to 69% pouring (up from 58%). Tennessee (64%) and Illinois (51%) and both saw healthy increases as well.



	Jan 28-31 	Feb 11-14 	Feb 25-28 	% Change 
	% Taps Pouring	% Taps Pouring	% Taps Pouring	From Previous
National	58%	60%	64%	+6.7%
Florida	70%	72%	72%	—
Georgia	64%	67%	66%	-1.5%
Texas	67%	58%	69%	+19.0%
Tennessee	61%	58%	64%	+10.3%
South Carolina	67%	70%	72%	+2.9%
New York	55%	59%	60%	+1.7%
Illinois	41%	46%	51%	+10.9%
Michigan	22%	62%	65%	+4.0%
Minnesota	67%	67%	69%	+3.0%
Nevada	65%	65%	70%	+7.7%

\* *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 two-period decline, Volume climbed +13.0% (Feb 25-28) for the period. Volume in Texas charged back, growing +34.9%, while Illinois (+25.0%), Nevada (+15.8) and Michigan (+13.8%) all saw healthy growth.

VOLUME CHANGE PER LOCATION	Compared to Feb 11-14 	Compared to Same Weekend 2020 
	% Change	% Change
National	+13.0%	-40%
Florida	-6.6%	-32%
Georgia	-2.8%	-43%
Texas	+34.9%	-32%
Tennessee	+7.0%	-31%
South Carolina	-7.5%	-44%
New York	+9.4%	-39%
Illinois	+25.0%	-58%
Michigan	+13.8%	-38%
Minnesota	+8.9%	-66%
Nevada	+15.8%	-38%

\* Volume totals per location

# VOLUME: RATE OF SALE

Rate of Sale saw a modest increase (+6.9%) after a two-period decline. Following form for the period, Texas (+21.0%) showed significant growth (+21.0%). Illinois (+15.4%), New York (+8.8%), Michigan (+7.9%), and Minnesota and Nevada (both +7.2%) all saw gains.

RATE OF SALE	Jan 28-31  30-Day ROS	Feb 11-14  30-Day ROS	Feb 25-28  30-Day ROS	% Change  From Previous	Same Weekend 2020  30-Day ROS	YOY  % Change
National	2.64	2.62	2.80	+6.9%	2.04	+37.3%
Florida	3.19	3.59	3.33	-7.2%	2.06	+61.7%
Georgia	2.55	2.65	2.62	-1.1%	1.23	+113.0%
Texas	5.19	4.55	5.50	+21.0%	3.26	+68.7%
Tennessee	3.20	3.31	3.27	-1.2%	1.67	+95.8%
South Carolina	2.69	3.02	2.74	-9.3%	1.13	+142.5%
New York	1.80	1.82	1.98	+8.8%	1.39	+42.4%
Illinois	2.88	2.59	2.99	+15.4%	1.81	+65.2%
Michigan	1.53	2.57	2.77	+7.9%	1.93	+43.5%
Minnesota	2.77	2.49	2.67	+7.2%	2.49	+7.2%
Nevada	2.39	2.50	2.68	+7.2%	3.52	-23.9%

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

# CATEGORY & STYLE PERFORMANCE

In Volume share, Domestics grew +1.2% to come in at 54.0% overall. Imports also jumped up +1.5% to check in at 15.4%. Craft took on that decline, dropping -2.7% to come in at 30.6% overall. In Tap Share, Domestics were +1.8% to climb to 28.9%, while Craft dropped -2.1% to come in at 54.0%. Imports were relatively flat (+0.3%), coming in at 17.1%. As has been the recent norm, the Top Five Styles remained unchanged.

## January 28-31

Volume Share Tap Share



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

## February 11-14

Volume Share Tap Share



Domestic	52.8%	27.1%
Craft	33.3%	56.1%
Import	13.9%	16.8%

## February 25-28

Volume Share Tap Share



Domestic	54.0%	28.9%
Craft	30.6%	54.0%
Import	15.4%	17.1%

### Top 5 Styles

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

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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](mailto:retailsales@beerboard.com) or 888.298.3641.

We always love talking beer!

