

On-Premise Status Report

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

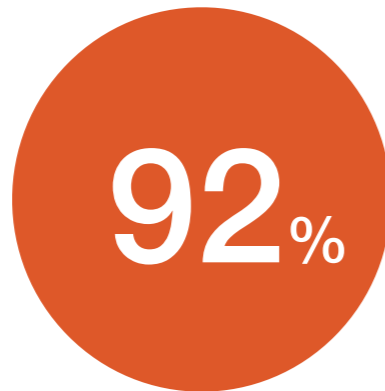
Cheers!
The BeerBoard Team



OPEN RATE

Open Rate (locations open and pouring beer) held firm at 92% for the second straight period. As reported previously, Open Rate has matched the high-water mark since BeerBoard began tracking this data in early May 2020. It has been at 90% or higher since late January.

Current Open Rate



March 11-14







Weekly Rates



May 8-10	16%	Dec 4-6	84%
May 22-25	45%	Dec 18-20	81%
June 5-7	66%	Dec 31 - Jan 3	80%
June 19-21	84%	Jan 14-17	85%
July 3-5	86%	Jan 28-31	90%
July 17-19	91%	Feb 11-14	90%
July 31-Aug 2	89%	Feb 25-28	92%
Aug 14-16	91%	March 11-14	92%
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%		

TAPS: AVERAGE # OF TAPS





Nationally, Average Number of Taps added one tap for the second consecutive period, climbing to 18 per location. Six of the 10 states tracked added at least one tap, led by Minnesota, which added two taps to climb back to 21 per location. Georgia, Illinois, Michigan, Nevada and South Carolina all added one tap each.

	Feb 11-14  Avg. # Taps	Feb 25-28  Avg. # Taps	March 11-14  Avg. # Taps	% Change  From Previous	Same Weekend 2020  Avg. # Taps	YOY  % Change
National	16	17	18	+5.9%	35	-48.6%
Florida	18	18	18	—	35	-48.6%
Georgia	16	16	17	+6.3%	41	-58.5%
Texas	15	18	18	—	31	-42.0%
Tennessee	16	18	18	—	42	-57.1%
South Carolina	16	16	17	+6.3%	31	-45.2%
New York	17	18	18	—	33	-45.5%
Illinois	12	13	14	+7.7%	28	-50.0%
Michigan	18	20	21	+5.0%	32	-34.4%
Minnesota	19	19	21	+10.5%	30	-30.0%
Nevada	18	19	20	+5.3%	34	-41.2%

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

TAPS: PERCENTAGE POURING

For the third consecutive period, Percentage of Taps Pouring increased, this time up two points to check in at 66% pouring nationally. Illinois (57%) and Michigan (71%) both grew six percentage points on the period, while Georgia (70%), Minnesota (73%) and Nevada (74%) climbed four points each.

	Feb 11-14 	Feb 25-28 	March 11-14 	% Change 
	% Taps Pouring	% Taps Pouring	% Taps Pouring	From Previous
National	60%	64%	66%	+3.1%
Florida	72%	72%	74%	+2.8%
Georgia	67%	66%	70%	+6.1%
Texas	58%	69%	71%	+2.9%
Tennessee	58%	64%	65%	+1.6%
South Carolina	70%	72%	73%	+1.4%
New York	59%	60%	63%	+5.0%
Illinois	46%	51%	57%	+11.8%
Michigan	62%	65%	71%	+9.2%
Minnesota	67%	69%	73%	+5.8%
Nevada	65%	70%	74%	+5.7%

* *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

Volume climbed +6.0% one the weekend (March 11-14) following a +13.0% jump the prior period (which shook off a two period decline). Volume in Illinois (+13.9%) and Michigan (+13.8%) continue to see solid growth, while Tennessee (+8.0%), Florida (+6.6%) and Nevada (+5.3%) all saw notable gains.

**VOLUME
CHANGE
PER LOCATION**

**Compared to
Feb 25-28**



% Change

**Compared to
Same Weekend 2020**









% Change

National	+6.0%	-38%
Florida	+6.6%	-30%
Georgia	+1.4%	-42%
Texas	+4.3%	-29%
Tennessee	+8.0%	-28%
South Carolina	+4.7%	-42%
New York	+4.3%	-37%
Illinois	+13.9%	-52%
Michigan	+13.8%	-33%
Minnesota	—	-65%
Nevada	+5.3%	-34%

* Volume totals per location

VOLUME: RATE OF SALE

Rate of Sale was relatively flat for the period (March 11-14). Among states tracked, Tennessee grew +5.8%, while Michigan (+4.3%) and Florida (+3.9%) also saw nice gains.

RATE OF SALE	Feb 11-14  30-Day ROS	Feb 25-28  30-Day ROS	March 11-14  30-Day ROS	% Change  From Previous	Same Weekend 2020  30-Day ROS	YOY  % Change
National	2.62	2.80	2.87	+2.5%	2.02	+42.1%
Florida	3.59	3.33	3.46	+3.9%	2.03	+70.4%
Georgia	2.65	2.62	2.52	-3.8%	1.19	+111.8%
Texas	4.55	5.50	5.55	+0.9%	3.25	+70.8%
Tennessee	3.31	3.27	3.46	+5.8%	1.63	+112.3%
South Carolina	3.02	2.74	2.75	+0.4%	1.13	+143.4%
New York	1.82	1.98	1.98	—	1.54	+28.6%
Illinois	2.59	2.99	3.06	+2.3%	1.82	+68.1%
Michigan	2.57	2.77	2.89	+4.3%	1.86	+55.4%
Minnesota	2.49	2.67	2.58	-3.4%	2.31	+11.7%
Nevada	2.50	2.68	2.67	-0.4%	3.52	-24.1%

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

CATEGORY & STYLE PERFORMANCE

Volume share was relatively flat for the period. Tap Share saw Domestics drop one full pint, picked up in full by Craft handles. The big change came in the Top Five Styles, which saw Wheat / Hefeweizen replace European Ales at #5. This is the first change in the ranking since early September 2020.

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%

March 11-14

Volume Share Tap Share



Domestic	53.8%	27.9%
Craft	30.5%	55.0%
Import	15.7%	17.1%

Top 5 Styles

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

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2. Lagers
3. IPA
4. Belgian Wit / White Ale
5. Wheat / Hefeweizen

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!

