

On-Premise Status Report

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

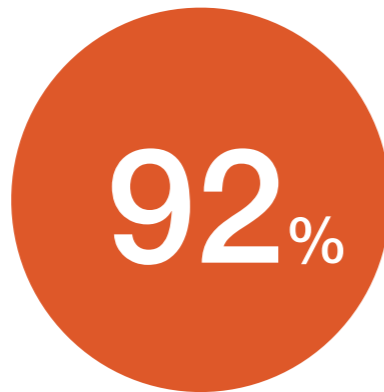
Cheers!
The BeerBoard Team



OPEN RATE

Open Rate (locations open and pouring beer) held firm at 92% for the third straight period. As reported previously, Open Rate has matched the high-water mark going back to an eight-week stretch in September and October 2020.

Current Open Rate



March 25-28, 2021

Weekly Rates



2020







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%

2021

Jan 14-17	85%
Jan 28-31	90%
Feb 11-14	90%
Feb 25-28	92%
March 11-14	92%
March 25-28	92%

TAPS: AVERAGE # OF TAPS

Nationally, Average Number of Taps held firm at 18 handles per location. Four of the states tracked added one tap each — Illinois (15), Michigan (22), Nevada (21) and Tennessee (19). Minnesota (20) and South Carolina (16) dropped one handle each, while Florida (18), Georgia (17), New York (18) and Texas (18) all held firm.





	Feb 25-28  Avg. # Taps	March 11-14  Avg. # Taps	March 25-28  Avg. # Taps	% Change  From Previous	Same Weekend 2019  Avg. # Taps	YOY  % Change
National	17	18	18	—	36	-50.0%
Florida	18	18	18	—	34	-47.1%
Georgia	16	17	17	—	40	-57.5%
Texas	18	18	18	—	32	-43.8%
Tennessee	18	18	19	+5.6%	41	-53.7%
South Carolina	16	17	16	-5.9%	32	-50.0%
New York	18	18	18	—	34	-47.1%
Illinois	13	14	15	+7.1%	29	-48.3%
Michigan	20	21	22	+4.8%	31	-29.0%
Minnesota	19	21	20	-4.8%	29	-31.0%
Nevada	19	20	21	+5.0%	35	-40.0%

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

** Due to little / no actionable data from Same Weekend 2020, we compared against Same Weekend 2019

TAPS: PERCENTAGE POURING

For the fourth consecutive period, Percentage of Taps Pouring increased, this time up three points (+3.0%) to check in at 68% pouring nationally. Growth among the states tracked was nominal, seeing Nevada lead the way with a +2.7% climb. Illinois (+1.8%), New York (+1.6%), Florida (+1.4%) and Texas (+1.4%) were also up.

	Feb 25-28 	March 11-14 	March 25-28 	% Change 
	% Taps Pouring	% Taps Pouring	% Taps Pouring	From Previous
National	64%	66%	68%	+3.0%
Florida	72%	74%	75%	+1.4%
Georgia	66%	70%	70%	—
Texas	69%	71%	72%	+1.4%
Tennessee	64%	65%	65%	—
South Carolina	72%	73%	71%	-2.7%
New York	60%	63%	64%	+1.6%
Illinois	51%	57%	58%	+1.8%
Michigan	65%	71%	70%	-1.4%
Minnesota	69%	73%	72%	-1.4%
Nevada	70%	74%	76%	+2.7%

* *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 +5.7% nationally for the period, the third consecutive period to see growth. Nevada paced the states tracked with a healthy +15.7% on the weekend, while Georgia was +9.9%. Florida (+6.6%), Minnesota (+5.1%) and Texas (+4.4%) also saw noticeable gains.

VOLUME CHANGE PER LOCATION

Compared to March 11-14



% Change

Compared to Same Weekend 2019



% Change







National	+5.7%	-33%
Florida	+6.6%	-29%
Georgia	+9.9%	-38%
Texas	+4.4%	-28%
Tennessee	+3.3%	-27%
South Carolina	-1.3%	-43%
New York	+4.1%	-35%
Illinois	+0.7%	-51%
Michigan	+1.0%	-32%
Minnesota	+5.1%	-62%
Nevada	+15.7%	-28%

* Volume totals per location

** Due to little / no actionable data from Same Weekend 2020, we compared against Same Weekend 2019

VOLUME: RATE OF SALE

Rate of Sale was up slightly for the second straight period, this time climbing +2.8% (it was up +2.5% for March 11-14). Nine of the 10 states tracked saw growth over the weekend, paced by Nevada (+12.4%) and Georgia (+7.9%). Minnesota (+6.2%), New York (+5.6%) and Florida (+5.5%) also saw tangible gains.

RATE OF SALE	Feb 25-28  30-Day ROS	March 11-14  30-Day ROS	March 25-28  30-Day ROS	% Change  From Previous	Same Weekend 2019  30-Day ROS	YOY  % Change
National	2.80	2.87	2.95	+2.8%	2.34	+26.1%
Florida	3.33	3.46	3.65	+5.5%	2.37	+54.0%
Georgia	2.62	2.52	2.72	+7.9%	1.36	+100.0%
Texas	5.50	5.55	5.74	+3.4%	3.55	+101.1%
Tennessee	3.27	3.46	3.52	+1.7%	1.75	+112.3%
South Carolina	2.74	2.75	2.77	+0.7%	1.23	+125.2%
New York	1.98	1.98	2.09	+5.6%	1.47	+42.2%
Illinois	2.99	3.06	3.10	+1.3%	2.41	+28.6%
Michigan	2.77	2.89	2.89	—	2.24	+29.0%
Minnesota	2.67	2.58	2.74	+6.2%	2.70	+1.5%
Nevada	2.68	2.67	3.00	+12.4%	3.97	-24.4%

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

** Due to little / no actionable data from Same Weekend 2020, we compared against Same Weekend 2019

CATEGORY & STYLE PERFORMANCE

Craft grew +1.3% in Volume share for the period to check in at 31.8%. Domestics gave up the balance of that share, falling -1.7% to come in at 52.1%. Tap Share was flat on the weekend. The Top Five Styles were unchanged.

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%

March 25-28

Volume Share Tap Share



Domestic	52.1%	27.7%
Craft	31.8%	55.4%
Import	16.1%	16.9%

Top 5 Styles

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

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

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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!

