

# On-Premise Status Report

April 8-11, 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 April 8-11, 2021, and compare this to our two previous reports - March 25-28 and March 11-14.

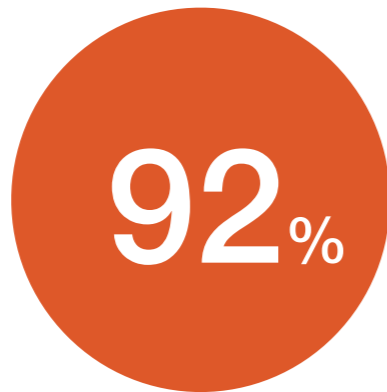
Cheers!  
The BeerBoard Team



# OPEN RATE

Open Rate (locations open and pouring beer) held firm at 92% for the fourth straight period, and has been clocking in at least 90% since late January.

## Current Open Rate



April 8-11, 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%
April 8-11	92%

# TAPS: AVERAGE # OF TAPS

Nationally, Average Number of Taps held firm at 18 handles per location for the third straight period. Six of the states tracked also remained unchanged from March 25-28. Minnesota was the only state to grow, adding one tap to climb back to 21. Georgia, Michigan and Nevada all dropped on tap per location.





	March 11-14  Avg. # Taps	March 25-28  Avg. # Taps	April 8-11  Avg. # Taps	% Change  From Previous	Same Weekend 2019  Avg. # Taps	YOY  % Change
National	18	18	18	—	36	-50.0%
Florida	18	18	18	—	32	-43.8%
Georgia	17	17	16	-5.9%	38	-57.9%
Texas	18	18	18	—	33	-45.5%
Tennessee	18	19	19	—	40	-52.5%
South Carolina	17	16	16	—	33	-51.5%
New York	18	18	18	—	32	-43.8%
Illinois	14	15	15	—	30	-50.0%
Michigan	21	22	21	-4.5%	32	-34.4%
Minnesota	21	20	21	+5.0%	30	-30.0%
Nevada	20	21	20	-4.8%	36	-44.4%

\* 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

Following growth over the previous four periods, Percentage of Taps Pouring fell to 67%. Only three states grew on the weekend - Illinois (61%), Minnesota (73%) and Tennessee (65%). Florida saw the largest decline on the weekend, falling from 75% to 72%.

	March 11-14 	March 25-28 	April 8-11 	% Change 
	% Taps Pouring	% Taps Pouring	% Taps Pouring	From Previous
National	66%	68%	67%	-1.5%
Florida	74%	75%	72%	-4.0%
Georgia	70%	70%	67%	-4.3%
Texas	71%	72%	70%	-2.8%
Tennessee	65%	65%	66%	+1.5%
South Carolina	73%	71%	70%	-1.4%
New York	63%	64%	63%	-1.6%
Illinois	57%	58%	61%	+5.2%
Michigan	71%	70%	68%	-2.9%
Minnesota	73%	72%	73%	+1.4%
Nevada	74%	76%	74%	-2.6%

\* *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 fell -5.4% nationally for the period, reversing the climb from the prior period (+5.7%) and ending three periods of growth. Each of the 10 states tracked saw declines, with New York (-18.1%) and Michigan (-16.4%) seeing the steepest falls.

## VOLUME CHANGE PER LOCATION

### Compared to March 25-28



% Change

### Compared to Same Weekend 2019



% Change







National	-5.4%	-38%
Florida	-7.1%	-34%
Georgia	-1.9%	-39%
Texas	-6.8%	-34%
Tennessee	-8.1%	-34%
South Carolina	-1.3%	-44%
New York	-18.1%	-46%
Illinois	-3.4%	-52%
Michigan	-16.4%	-40%
Minnesota	-2.2%	-63%
Nevada	-5.3%	-32%

\* Volume totals per location

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

# VOLUME: RATE OF SALE

Following the declines for Percentage Taps Pouring and Volume, Rate of Sale was also down on the period (from 2.95 to 2.80). Only two states tracked saw a positive return on ROS for the weekend — Georgia climbed +5.5% to 2.87, while South Carolina was up nominally (+1.8% to 2.82). New York saw the biggest decline, falling -17.2% to 1.73.

RATE OF SALE	March 11-14  30-Day ROS	March 25-28  30-Day ROS	April 8-11  30-Day ROS	% Change  From Previous	Same Weekend 2019  30-Day ROS	YOY  % Change
National	2.87	2.95	2.80	-5.1%	2.34	+19.7%
Florida	3.46	3.65	3.52	-3.4%	2.38	+47.9%
Georgia	2.52	2.72	2.87	+5.5%	1.40	+105.0%
Texas	5.55	5.74	5.48	-4.5%	3.55	+54.4%
Tennessee	3.46	3.52	3.25	-7.7%	1.76	+84.7%
South Carolina	2.75	2.77	2.82	+1.8%	1.23	+129.3%
New York	1.98	2.09	1.73	-17.2%	1.48	+16.8%
Illinois	3.06	3.10	2.78	-10.3%	2.42	+14.9%
Michigan	2.89	2.89	2.51	-13.1%	2.25	+11.6%
Minnesota	2.58	2.74	2.61	-4.7%	2.71	-3.7%
Nevada	2.67	3.00	2.93	-2.3%	4.02	-27.1%

\* % 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

There was little movement in both Volume Share and Tap Share, as both were relatively flat. In addition, the Top Five Styles were unchanged for the third consecutive period.

## 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%

## April 8-11

Volume Share Tap Share



Domestic	52.5%	27.8%
Craft	31.6%	55.7%
Import	15.9%	16.5%

### Top 5 Styles

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

We always love talking beer!

