

On-Premise Status Report

April 22-25, 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 April 22-25, 2021, and compare this to our two previous reports - April 8-11 and March 25-28.

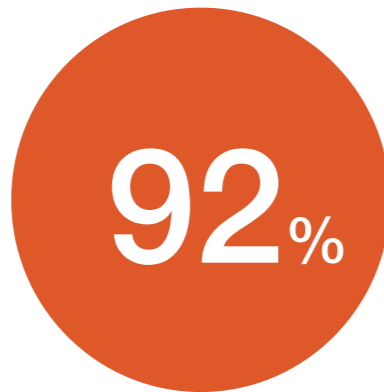
Cheers!
The BeerBoard Team



OPEN RATE

For the fifth consecutive period Open Rate (locations open and pouring beer) held firm at 92%. It has been clocking in at least 90% since late January.

Current Open Rate



April 22-25, 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%
April 22-25	92%

TAPS: AVERAGE # OF TAPS

Nationally, Average Number of Taps held firm at 18 handles per location for the fourth straight period. Four of the states tracked added one handle — Georgia (17), Illinois (16), Michigan (22) and South Carolina (17). Minnesota dropped one handle to fall back to 20 per location.





	March 25-28  Avg. # Taps	April 8-11  Avg. # Taps	April 22-25  Avg. # Taps	% Change  From Previous	Same Weekend 2019  Avg. # Taps	YOY  % Change
National	18	18	18	—	38	-50.0%
Florida	18	18	18	—	34	-43.8%
Georgia	17	16	17	+5.9%	37	-57.9%
Texas	18	18	18	—	34	-45.5%
Tennessee	19	19	19	—	41	-52.5%
South Carolina	16	16	17	+5.9%	32	-51.5%
New York	18	18	18	—	33	-43.8%
Illinois	15	15	16	+4.5%	31	-50.0%
Michigan	22	21	22	+4.5%	33	-34.4%
Minnesota	20	21	20	-5.0%	32	-30.0%
Nevada	21	20	20	—	35	-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

Percentage Taps Pouring bounced back after a one period dip, climbing back to 68%. Six of the states tracked saw an increase on the weekend, led by Georgia, Michigan and South Carolina. Minnesota and Nevada both saw nominal declines for the period.



	March 25-28 	April 8-11 	April 22-25 	% Change 
	% Taps Pouring	% Taps Pouring	% Taps Pouring	From Previous
National	68%	67%	68%	+1.5%
Florida	75%	72%	72%	—
Georgia	70%	67%	70%	+4.5%
Texas	72%	70%	71%	+1.4%
Tennessee	65%	66%	67%	+1.5%
South Carolina	71%	70%	72%	+2.9%
New York	64%	63%	63%	—
Illinois	58%	61%	62%	+1.6%
Michigan	70%	68%	70%	+2.9%
Minnesota	72%	73%	71%	-2.7%
Nevada	76%	74%	73%	-1.4%

* *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 one-period decline, Volume grew +2.6% and has now seen growth in four of the last five periods. Seven of the 10 states tracked saw growth as well with Tennessee and South Carolina both recording +9.3% increases. On the flip side, Minnesota saw a -9.3% decline for the weekend.






VOLUME CHANGE PER LOCATION	Compared to April 8-11	Compared to Same Weekend 2019
		
	% Change	% Change
National	+2.6%	-36%
Florida	+1.4%	-33%
Georgia	-2.5%	-40%
Texas	+2.7%	-32%
Tennessee	+9.3%	-30%
South Carolina	+9.3%	-38%
New York	+4.8%	-42%
Illinois	+1.4%	-51%
Michigan	+4.6%	-38%
Minnesota	-9.3%	-66%
Nevada	-0.5%	-33%

* 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 ticked back up after a period of decline, increasing nominally +0.7%. Five states saw an increase on the weekend, led by Tennessee (+6.2%) and New York (+5.2%). Three states tracked saw declines, paced by Georgia (-5.9%) and Minnesota (-5.7%).

RATE OF SALE	March 25-28  30-Day ROS	April 8-11  30-Day ROS	April 22-25  30-Day ROS	% Change  From Previous	Same Weekend 2019  30-Day ROS	YOY  % Change
National	2.95	2.80	2.82	+0.7%	2.38	+18.9%
Florida	3.65	3.52	3.52	—	2.38	+47.9%
Georgia	2.72	2.87	2.70	-5.9%	1.26	+114.3%
Texas	5.74	5.48	5.53	+0.9%	3.60	+53.6%
Tennessee	3.52	3.25	3.45	+6.2%	1.79	+92.7%
South Carolina	2.77	2.82	2.87	+1.8%	1.25	+129.6%
New York	2.09	1.73	1.82	+5.2%	1.52	+19.7%
Illinois	3.10	2.78	2.77	-0.4%	2.47	+12.1%
Michigan	2.89	2.51	2.52	+0.4%	2.26	+11.5%
Minnesota	2.74	2.61	2.46	-5.7%	2.76	-10.9%
Nevada	3.00	2.93	2.95	-0.7%	4.06	-27.3%

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

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CATEGORY & STYLE PERFORMANCE

In Volume Share, Craft picked up a full point, coming directly from Domestics (51.5%), and moved to 32.6%. Similarly, in Tap Share, Craft improved by 0.9% to claim 56.6% of active handles. Domestics (27.4%) dropped 0.4% and Imports (16.0%) gave up 0.5% this period. The Top Five Styles were unchanged for the fourth consecutive period.

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%

April 22-25

Volume Share Tap Share



Domestic	51.5%	27.4%
Craft	32.6%	56.6%
Import	15.9%	16.0%

Top 5 Styles

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

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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!

