

On-Premise Status Report

May 6-9, 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 May 6-9, 2021, and compare this to our two previous reports - April 22-25 and April 8-11.

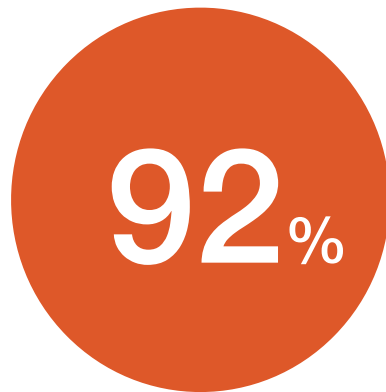
Cheers!
The BeerBoard Team



OPEN RATE

For the sixth 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



May 6-9, 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%
May 6-9	92%

TAPS: AVERAGE # OF TAPS

Nationally, Average Number of Taps held firm at 18 handles per location for the fifth straight period. Five of the states tracked had their count unchanged, while four dropped one handle each. Minnesota was the only state to add to their total - moving from 20 to 21 handles per location.





	April 8-11  Avg. # Taps	April 22-25  Avg. # Taps	May 6-9  Avg. # Taps	% Change  From Previous	Same Weekend 2019  Avg. # Taps	YOY  % Change
National	18	18	18	—	36	-50.0%
Florida	18	18	17	-5.6%	35	-51.4%
Georgia	16	17	16	-5.9%	36	-55.6%
Texas	18	18	18	—	35	-48.6%
Tennessee	19	19	18	-5.3%	42	-57.1%
South Carolina	16	17	16	-5.9%	32	-50.0%
New York	18	18	18	—	34	-47.1%
Illinois	15	16	16	—	32	-50.0%
Michigan	21	22	22	—	34	-35.3%
Minnesota	21	20	21	+5.0%	33	-36.4%
Nevada	20	20	20	—	34	-41.2%

* 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 continues its yo-yo, dropping back to 67% after a one-period climb. Four states tracked saw an increase on the period - Illinois, Minnesota, Nevada and New York. Michigan held firm at 70% of taps pouring.

	April 8-11 	April 22-25 	May 6-9 	% Change 
	% Taps Pouring	% Taps Pouring	% Taps Pouring	From Previous
National	67%	68%	67%	-1.5%
Florida	72%	72%	71%	-1.4%
Georgia	67%	70%	66%	-5.7%
Texas	70%	71%	68%	-4.2%
Tennessee	66%	67%	62%	-7.5%
South Carolina	70%	72%	70%	-2.8%
New York	63%	63%	64%	+1.6%
Illinois	61%	62%	63%	+1.6%
Michigan	68%	70%	70%	—
Minnesota	73%	71%	73%	+2.7%
Nevada	74%	73%	76%	+4.1%

* *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 increase, Volume saw a sizable decline, falling -12.1% on the weekend. It was the biggest fall since early February, when Volume dropped -9.9%. Each of the 10 states tracked saw a fall, led by South Carolina (-20.6%), Georgia (-19.5%) and Tennessee (-19.3%). Florida (-15.6%) and Texas (-10.6%) were also down double-digits on the weekend.

VOLUME CHANGE PER LOCATION

Compared to April 22-25



% Change

Compared to Same Weekend 2019



% Change







National	-12.1%	-40%
Florida	-15.6%	-39%
Georgia	-19.5%	-45%
Texas	-10.6%	-38%
Tennessee	-19.3%	-49%
South Carolina	-20.6%	-48%
New York	-0.9%	-43%
Illinois	-8.9%	-54%
Michigan	-3.3%	-39%
Minnesota	-7.3%	-69%
Nevada	-8.8%	-35%

* Volume totals per location

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

VOLUME: RATE OF SALE

Similarly to Volume, Rate of Sale took a hit, falling -11.7%, while each of the states tracked saw negative return for the weekend. South Carolina (-16.4%), Georgia (-14.8%), Florida (-13.1%) and Tennessee (-13.0%) realized the largest declines.

RATE OF SALE	April 8-11 	April 22-25 	May 6-9 	% Change 	Same Weekend 2019 	YOY 
	30-Day ROS	30-Day ROS	30-Day ROS	From Previous	30-Day ROS	% Change
National	2.80	2.82	2.49	-11.7%	2.34	+6.4%
Florida	3.52	3.52	3.06	-13.1%	2.36	+29.7%
Georgia	2.87	2.70	2.30	-14.8%	1.34	+71.6%
Texas	5.48	5.53	5.09	-7.9%	3.57	+42.6%
Tennessee	3.25	3.45	3.00	-13.0%	1.82	+64.8%
South Carolina	2.82	2.87	2.40	-16.4%	1.22	+96.7%
New York	1.73	1.82	1.76	-3.3%	1.51	+16.6%
Illinois	2.78	2.77	2.48	-10.5%	2.40	+3.3%
Michigan	2.51	2.52	2.42	-4.0%	2.26	+7.1%
Minnesota	2.61	2.46	2.22	-9.8%	2.73	-18.7%
Nevada	2.93	2.95	2.57	-12.9%	4.01	-35.9%

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

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CATEGORY & STYLE PERFORMANCE

Volume Share and Tap Share were both pretty flat overall. In Volume, Imports ticked up 0.4% to 16.3% overall, Craft held firm at a 32.6% share, and Domestics fell -0.4% to come in at 51.1%. The Top Five Styles were unchanged for the fifth consecutive period.

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%

May 6-9

Volume Share Tap Share



Domestic	51.1%	27.6%
Craft	32.6%	56.7%
Import	16.3%	15.7%

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!

