

On-Premise Status Report

May 20-23, 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 20-23, 2021, and compare this to our two previous reports - May 6-9 and April 22-25.

Cheers!
The BeerBoard Team



OPEN RATE

Open Rate (locations open and pouring beer) ticked up one point to 93%, the highest rate since we started tracking this data in early May 2020. The rate had held steady at 92% for the previous six periods.

Current Open Rate



May 20-23, 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%
May 20-23	93%

TAPS: AVERAGE # OF TAPS

Nationally, after a five-period run of holding firm at 18 per location, Average Number of Taps added one handled and ticked up to 19 per. firm at 18 handles per location for the fifth straight period. Six of the states tracked added one handle to their count — Florida, Georgia, New York, Nevada, Tennessee and South Carolina. Three states (Michigan, Minnesota and Texas) remained unchanged, while Illinois dropped one handle per location.





	April 22-25  Avg. # Taps	May 6-9  Avg. # Taps	May 20-23  Avg. # Taps	% Change  From Previous	Same Weekend 2019  Avg. # Taps	YOY  % Change
National	18	18	19	+5.6%	39	-50.0%
Florida	18	17	18	+5.9%	36	-50.0%
Georgia	17	16	17	+6.3%	35	-51.4%
Texas	18	18	18	—	36	-50.0%
Tennessee	19	18	19	+5.6%	41	-53.7%
South Carolina	17	16	17	+6.3%	31	-45.2%
New York	18	18	19	+5.6%	35	-45.7%
Illinois	16	16	15	-6.3%	31	-51.6%
Michigan	22	22	22	—	35	-37.1%
Minnesota	20	21	21	—	35	-40.0%
Nevada	20	20	21	+5.0%	33	-36.4%

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

** Due to all states not being open on the Same Weekend 2020, we compared against Same Weekend 2019

TAPS: PERCENTAGE POURING

Percentage Taps Pouring continues its yo-yo, climbing back to 70% after a one-period decline. Seven of the states tracked saw an increase on the period, paced by Tennessee (+6.5%), Texas (+5.9%) and New York (+4.7%).

	April 22-25	May 6-9	May 20-23	% Change
				
	% Taps Pouring	% Taps Pouring	% Taps Pouring	From Previous
National	68%	67%	70%	+4.5%
Florida	72%	71%	73%	+2.8%
Georgia	70%	66%	69%	+4.5%
Texas	71%	68%	72%	+5.9%
Tennessee	67%	62%	66%	+6.5%
South Carolina	72%	70%	70%	—
New York	63%	64%	67%	+4.7%
Illinois	62%	63%	61%	-3.2%
Michigan	70%	70%	71%	+1.4%
Minnesota	71%	73%	73%	—
Nevada	73%	76%	79%	+3.9%

* *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

After a one-period decline (-12.1%), Volume saw noticeable growth of +9.2% for the weekend. Nine of the 10 states tracked were up for the period, led by Nevada (+23.2%), Florida (+14.5%), Texas (+12.6%) and Georgia (+12.1%). Michigan was the only state to see a decline, down a nominal -0.6%.

VOLUME CHANGE PER LOCATION

Compared to May 6-9



% Change

Compared to Same Weekend 2019



% Change







National	+9.2%	-38%
Florida	+14.5%	-35%
Georgia	+12.1%	-38%
Texas	+12.6%	-32%
Tennessee	+1.1%	-48%
South Carolina	+2.3%	-46%
New York	+1.9%	-42%
Illinois	+2.3%	-51%
Michigan	-0.6%	-38%
Minnesota	+9.2%	-61%
Nevada	+23.2%	-29%

* Volume totals per location

** Due to reduced actionable data from Same Weekend 2020, we compared against Same Weekend 2019

VOLUME: RATE OF SALE

Similarly to Volume, Rate of Sale bounced back to climb +4.8% on the weekend, but still has a way to go to match the numbers it was putting up in April. Nevada (+19.8%) led seven states which saw growth on the period, followed by Florida (+10.5%), Minnesota (+9.9%) and Georgia (+8.7%).

RATE OF SALE	April 22-25 	May 6-9 	May 20-23 	% Change 	Same Weekend 2020 	YOY 
	30-Day ROS	30-Day ROS	30-Day ROS	From Previous	30-Day ROS	% Change
National	2.82	2.49	2.61	+4.8%	2.35	+11.1%
Florida	3.52	3.06	3.38	+10.5%	2.38	+42.0%
Georgia	2.70	2.30	2.50	+8.7%	1.32	+89.4%
Texas	5.53	5.09	5.49	+7.9%	3.62	+51.7%
Tennessee	3.45	3.00	2.89	-3.7%	1.84	+57.1%
South Carolina	2.87	2.40	2.40	—	1.20	+50.0%
New York	1.82	1.76	1.70	-3.4%	1.49	+14.1%
Illinois	2.77	2.48	2.67	+7.6%	2.39	+11.7%
Michigan	2.52	2.42	2.38	+1.7%	2.13	+11.7%
Minnesota	2.46	2.22	2.44	+9.9%	2.73	+10.6%
Nevada	2.95	2.57	3.08	+19.8%	4.00	-23.0%

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

** Due to reduced actionable data from Same Weekend 2020, we compared against Same Weekend 2019

CATEGORY & STYLE PERFORMANCE

Craft took a nice step forward in Volume Share, growing +1.2% (33.8% overall) while also ticking up +0.6% in Tap Share (57.3%). Domestics took the brunt of the decline, falling -1.1% (50.0%) in Volume and -0.5% (27.1%) in Tap Share. For the first time in five tracked periods, there is a change in the Top Five Styles. European Ales checked in at #5, replacing Wheat / Hefeweizen.

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%

May 20-23

Volume Share Tap Share



Domestic	50.0%	27.1%
Craft	33.8%	57.3%
Import	16.2%	15.6%

Top 5 Styles

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

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

ABOUT BEERBOARD

BeerBoard is a leading technology company enabling the food & beverage industry to make data-driven decisions about its bar business. It manages over \$1 billion in retail draft beer sales and 60,000 products through its industry-leading solution. The company's patented digital platform captures, analyzes, and reports real-time data related to bar performance, brand insights and inventory. Built for retailers, brewers and distributors, the versatile technology is easily operated from a single dashboard, and it has streamlined operations and increased top and bottom line revenue all over the United States.

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!

