

KEY:

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| Anonymity | The Brewers Association places great value on the anonymity of survey respondents. Many survey questions were of a highly sensitive nature. Not all respondents chose to answer all questions. The answers to questions with very low participation rates are shown with less detail (for example, not broken down by region, or not organized by company size), or may be shown on a per barrel basis (based on 2009 reported production) in order to protect the identity of the companies that answered these questions. The answer u/r (“unreported”), indicates an answer that is not provided in order to protect the anonymity of survey respondents. |
| Brewery Production Employees | For purposes of this survey, these are Brewmaster/Head Brewers, Shift Brewers, Cellarmen, QA/QC/Sensory, Lab and R&D employees. |
| Brewpub | The Brewers Association defines a brewpub as follows: A restaurant-brewery that sells 25% or more of its company-owned production onsite. The beer is brewed primarily for sale in the restaurant and bar. The beer is often dispensed directly from the brewery’s storage tanks. Where allowed by law, brewpubs often sell beer “to go” and/or distribute to off site accounts. |
| Brewpub Sizes | Brewpubs were grouped based on their reported 2009 production figures in US Barrels. Groups were chosen in order to even out the number of responses within each size group. Many answers to survey questions are published on a per barrel basis, making identification of individual respondents impossible. Brewpubs with more than one location were given the option of answering questions in aggregate form, or based on average value per store values. Unless otherwise noted, survey answers are reported on a per store basis. |
| Full-Time Employee | For purposes of this survey, full-time employees are those working >30 hours per week or salaried. |
| Max | The largest value among all responses |
| Mean | The “average” value of survey responses to a given question. The total of all responses given, divided by the number of responses |
| Median | The “middle” response. An equal number of larger and smaller values were given as responses |
| Min | The smallest value among all responses |
| Mode | The most common answer to a question |
| Non-Production, Sales and Marketing Employees | For purposes of this survey, these are Owners/Proprietors, Professional Services (Accounting, Legal, Engineering, other), Administrative, Sustainability, HR, PR, other, Marketing/Advertising/Sales Managers or Staff, Material Ordering/Order Fulfillment/Warehouse/Logistics/Maintenance/All Others |
| Part-Time Employee | For purposes of this survey, part-time employees are those working <30 hours per week. |
| Production Brewery | A production brewery, contract brewing company or alternating proprietorship that is not a brewpub. |
| Production Brewery Sizes | Production breweries were grouped based on their reported 2009 total production figures in US Barrels. Group volume breaks were chosen in order to roughly even out the number of responses within each size group. The largest category of production breweries (with 2009 production >50,000 US Barrels) contained the smallest number of responses. In order to maintain the confidentiality of individual respondents, answers within this group are often published as an entire group, with less detail than other groups. Many answers to survey questions are published on a per barrel basis, making identification of individual respondents impossible. All production brewery respondents entered their information in aggregate form. |
| Respondents | The survey included US craft brewers as defined by the Brewers Association. Datasets that did not include 2009 production data were removed. 224 total datasets were included in the analysis. |
| Restaurant Employees | For purposes of these survey, these are grouped as Chefs/Kitchen Managers (back-of-house), Wait Staff and Bar Managers (front-of-house), Cooks, Dishwashers, other (back-of-house), Wait Staff, Bar Staff, Bussers, Host-Greeters, other (front-of-house). |

REGIONS:

Regions: For the purposes of this survey, states were assigned to generally accepted definitions of regions, with a few exceptions that allowed for more even numbers of responses among the regions. Regions are usually tabulated alphabetically.

Midwest Illinois, Indiana, Iowa, Kansas, Michigan, Minnesota, Missouri, Nebraska, North Dakota, Ohio, South Dakota, Wisconsin

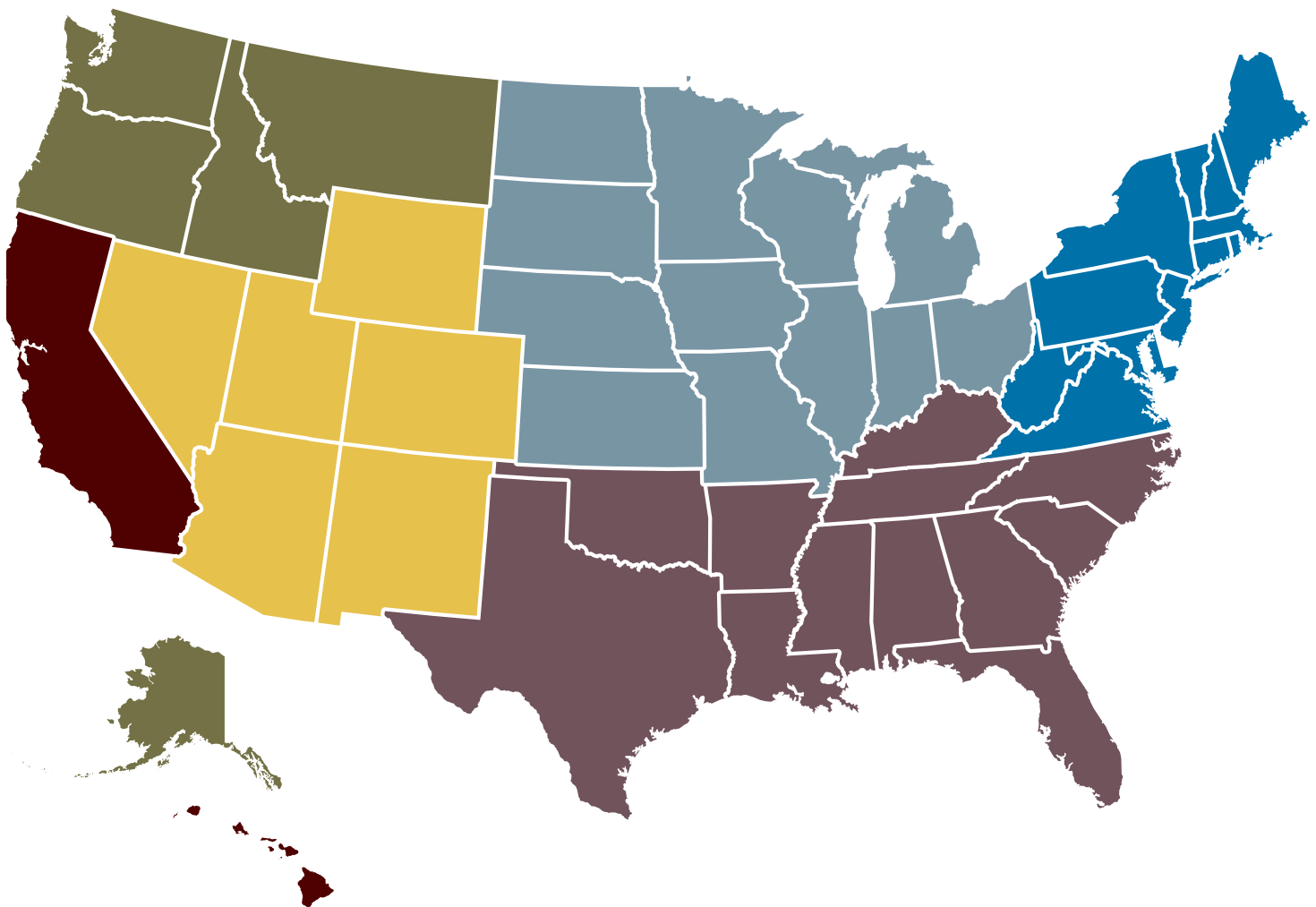
Mountain West Arizona, Colorado, Nevada, New Mexico, Utah, Wyoming

Northeast Connecticut, Delaware, Maine, Maryland, Massachusetts, New Hampshire, New Jersey, New York, Pennsylvania, Rhode Island, Vermont, Virginia, Washington DC, West Virginia

Pacific California, Hawaii

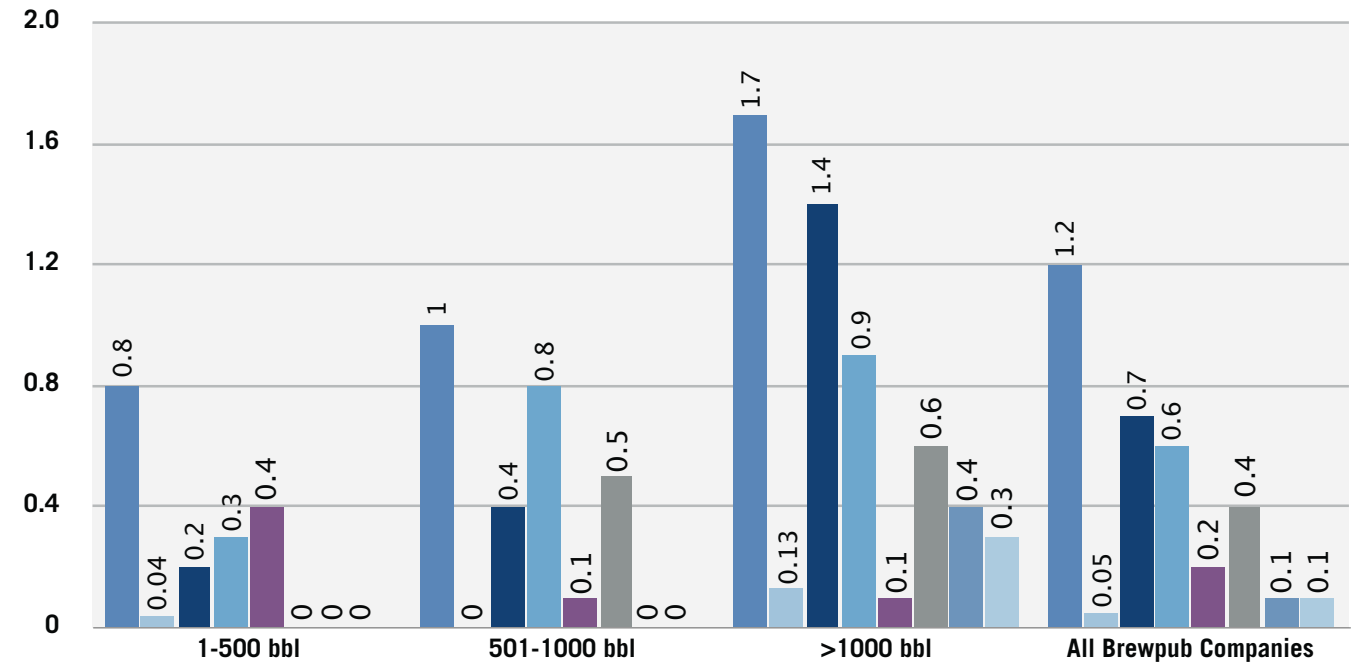
Pacific NW Alaska, Idaho, Montana, Oregon, Washington

South Alabama, Arkansas, Florida, Georgia, Kentucky, Louisiana, Mississippi, North Carolina, Oklahoma, South Carolina, Tennessee, Texas



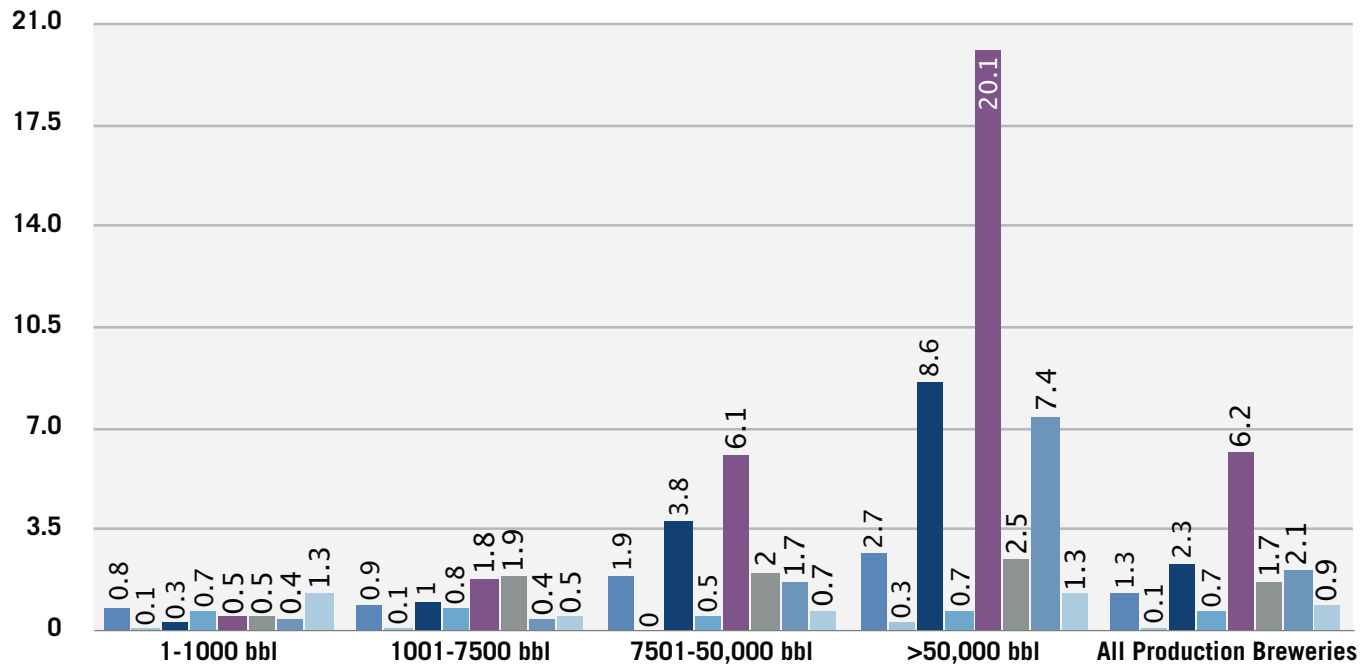
46. AVG. NUMBER OF FT/PT PRODUCTION STAFF BY SIZE

Brewpub Companies (TTL 2009 Production)



- Avg # F/T Brewmasters - Lead Brewers
- Avg # P/T Brewmasters - Lead Brewers
- Avg # F/T Asst Brewers, Shift Brewers & Cellarmen
- Avg # P/T Asst Brewers, Shift Brewers & Cellarmen
- Avg # F/T Packaging and Draft Line
- Avg # P/T Packaging and Draft Line
- Avg # F/T QC/ QA/Sensory, Lab, R&D, All Other Brewery Prod
- Avg # P/T QC/QA/ Sensory, Lab, R&D, All Other Brewery Prod

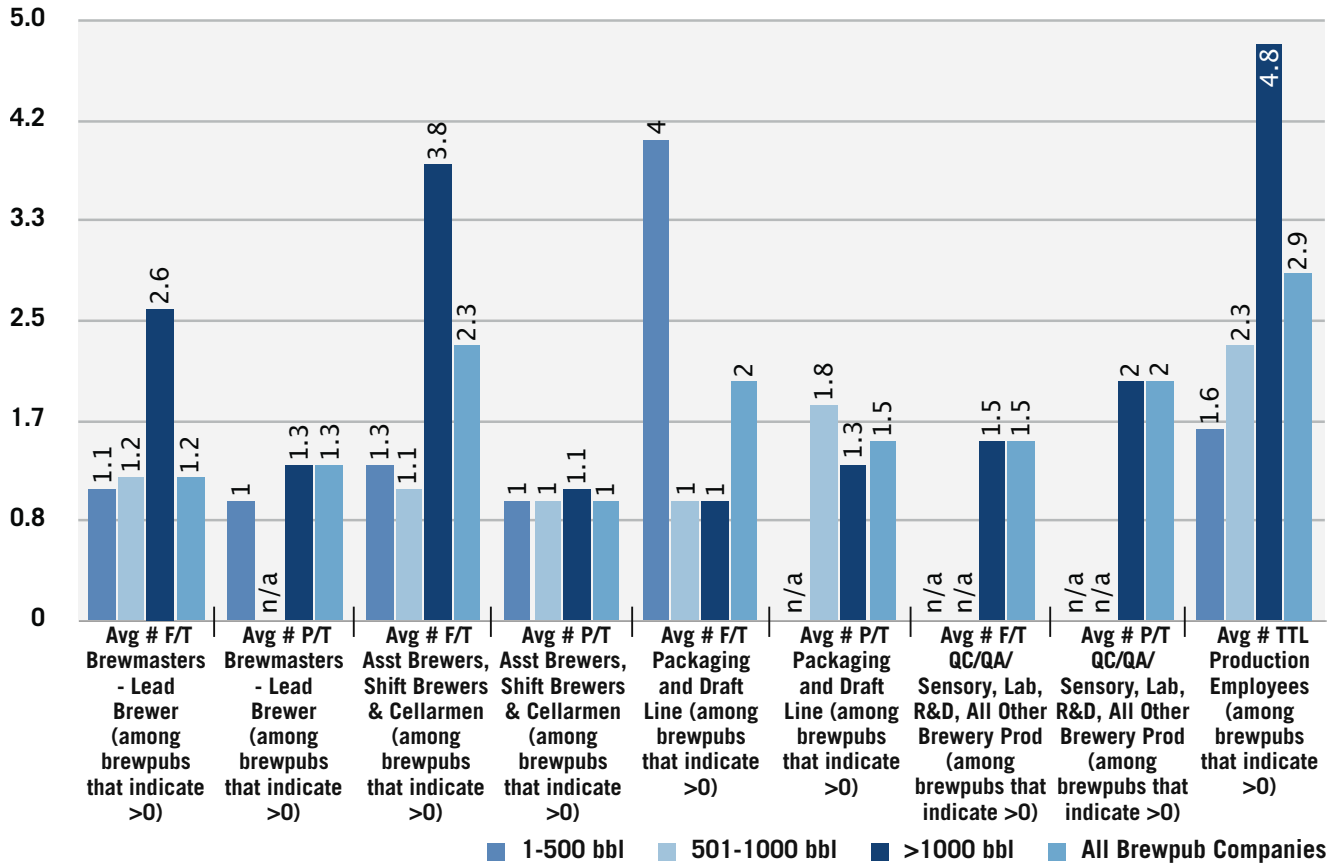
Production Breweries (TTL 2009 Production)



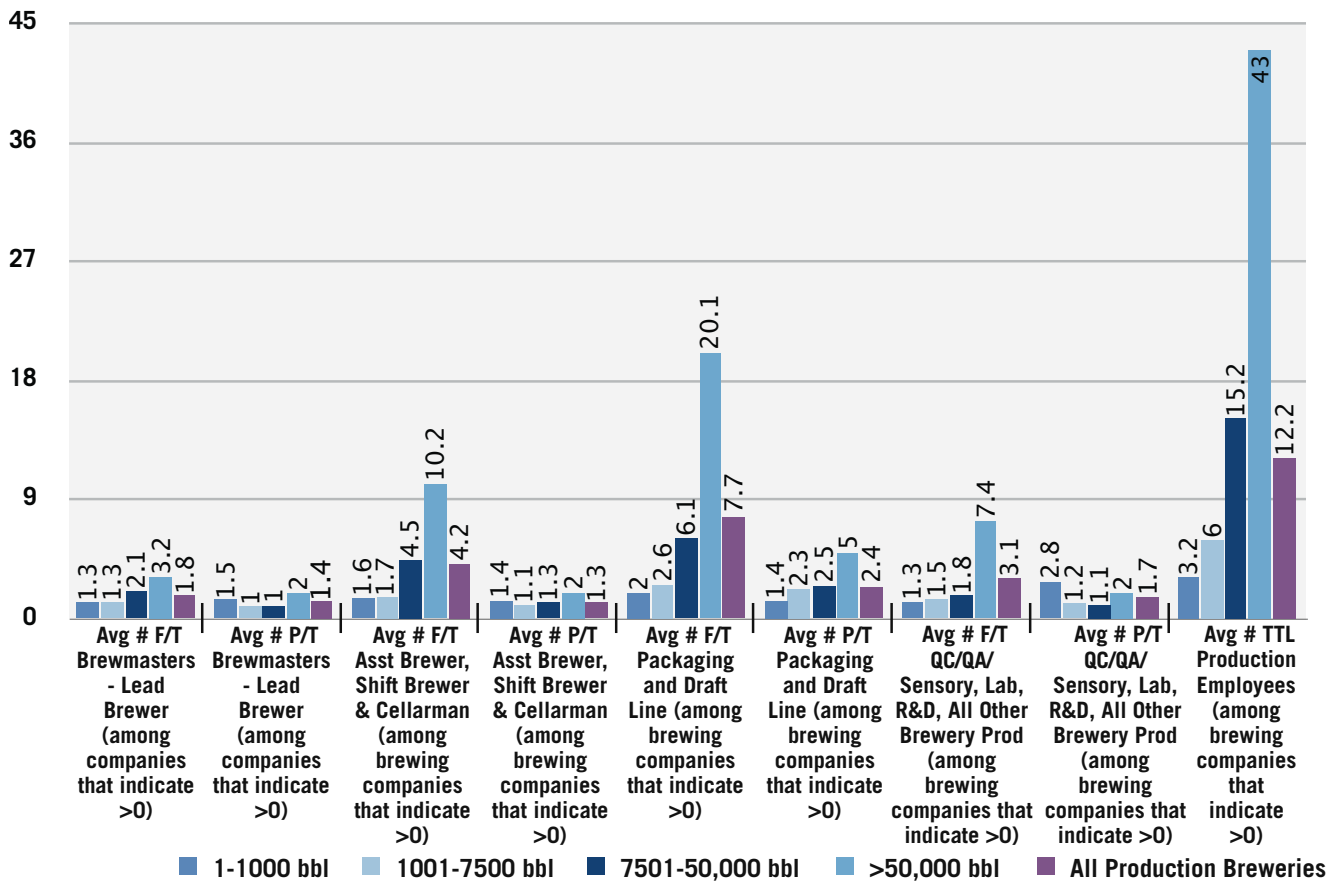
- Avg # F/T Brewmasters - Lead Brewers
- Avg # P/T Brewmasters - Lead Brewers
- Avg # F/T Asst Brewers, Shift Brewers & Cellarmen
- Avg # P/T Asst Brewers, Shift Brewers & Cellarmen
- Avg # F/T Packaging and Draft Line
- Avg # P/T Packaging and Draft Line
- Avg # F/T QC/ QA/Sensory, Lab, R&D, All Other Brewery Prod
- Avg # P/T QC/QA/ Sensory, Lab, R&D, All Other Brewery Prod

47. EMPLOYEE PRODUCTIVITY - 1000 BBL OF 2009 AVG. TTL PRODUCTION PER EMPLOYEE

Brewpub Companies (TTL 2009 Production)

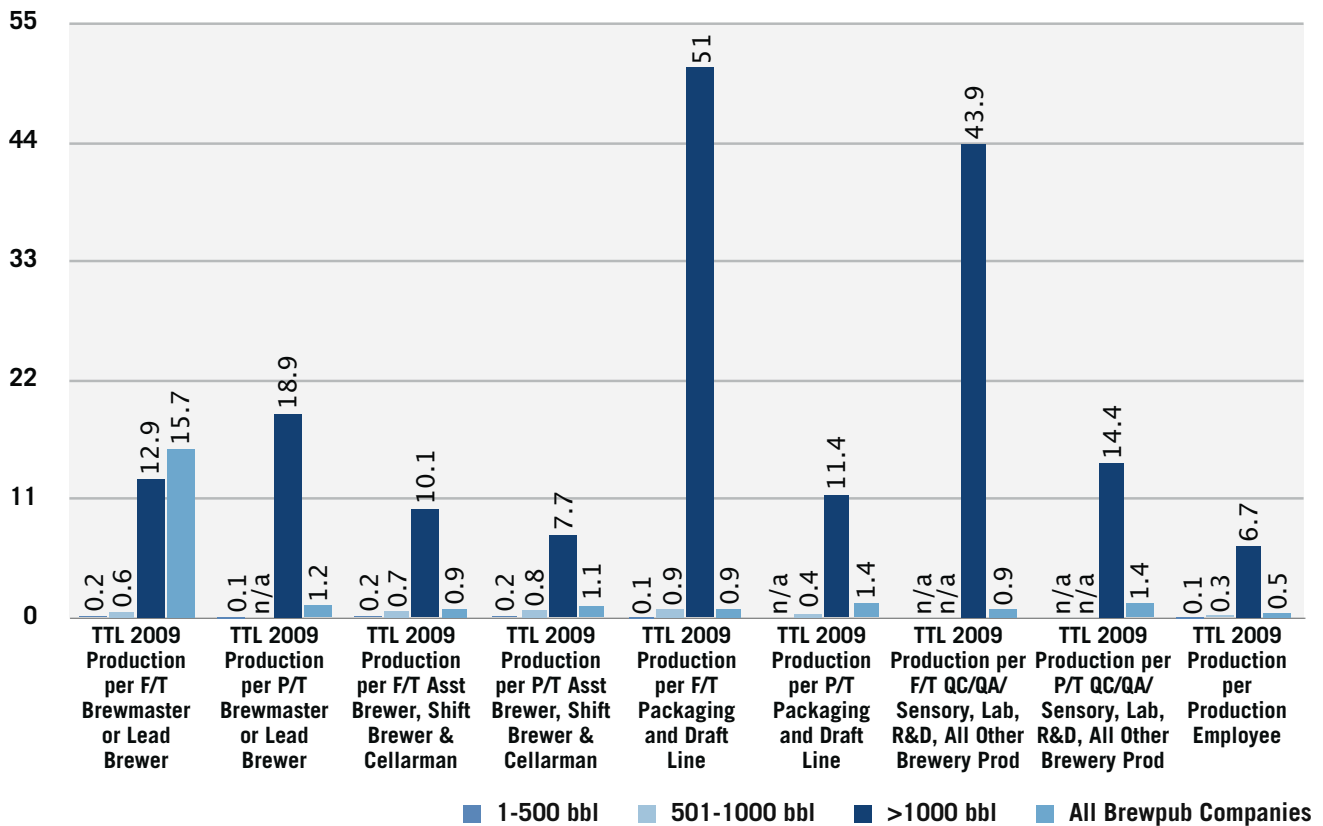


Production Breweries (TTL 2009 Production)

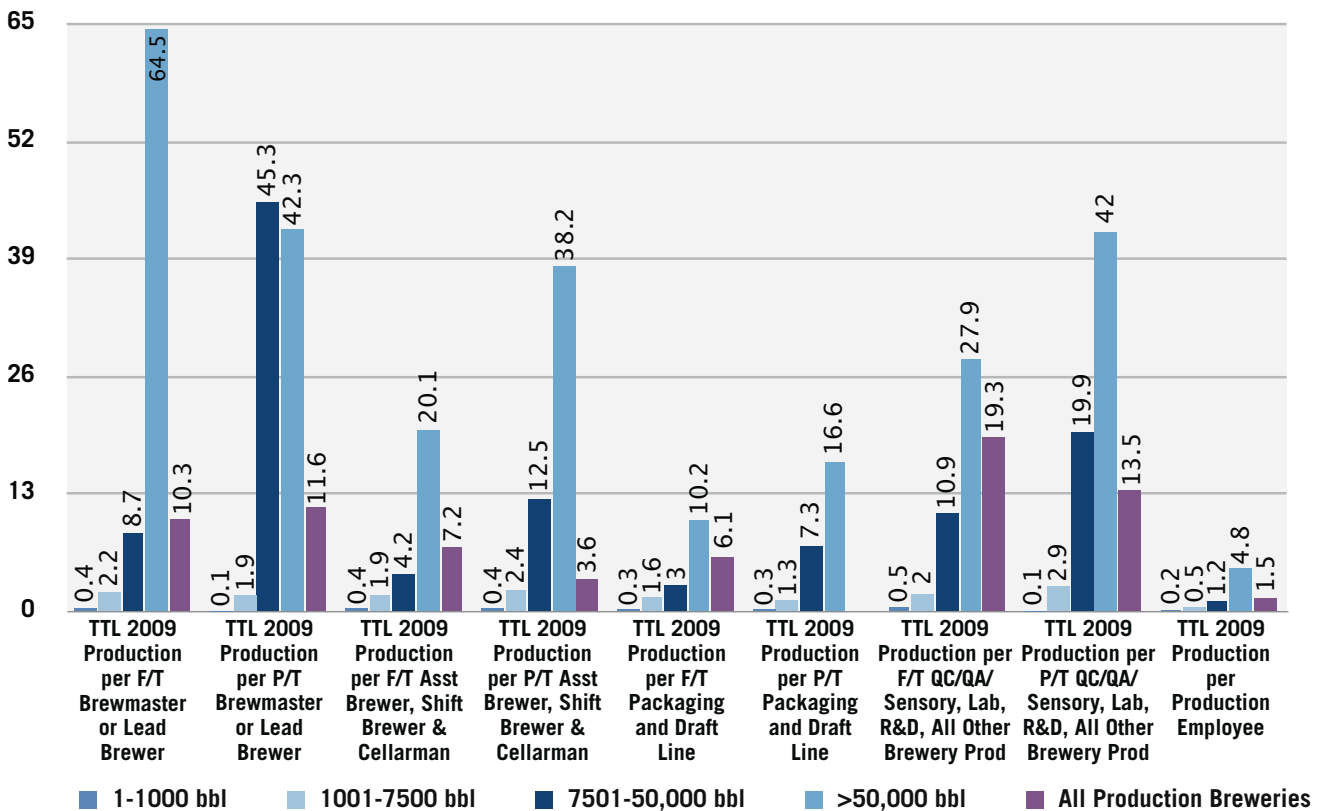


48. EMPLOYEE PRODUCTIVITY - 1000 BBL OF 2009 TTL PRODUCTION PER EMPLOYEE

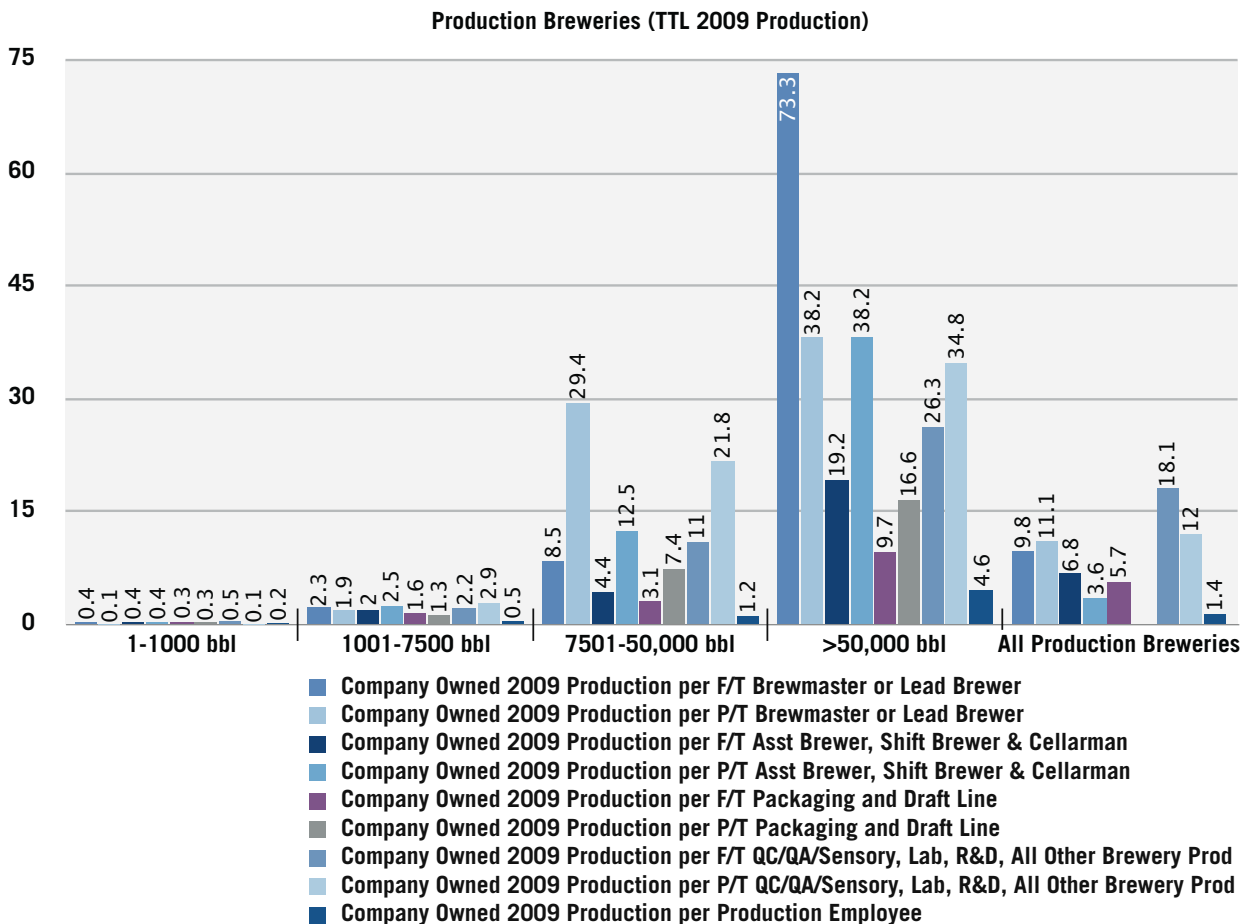
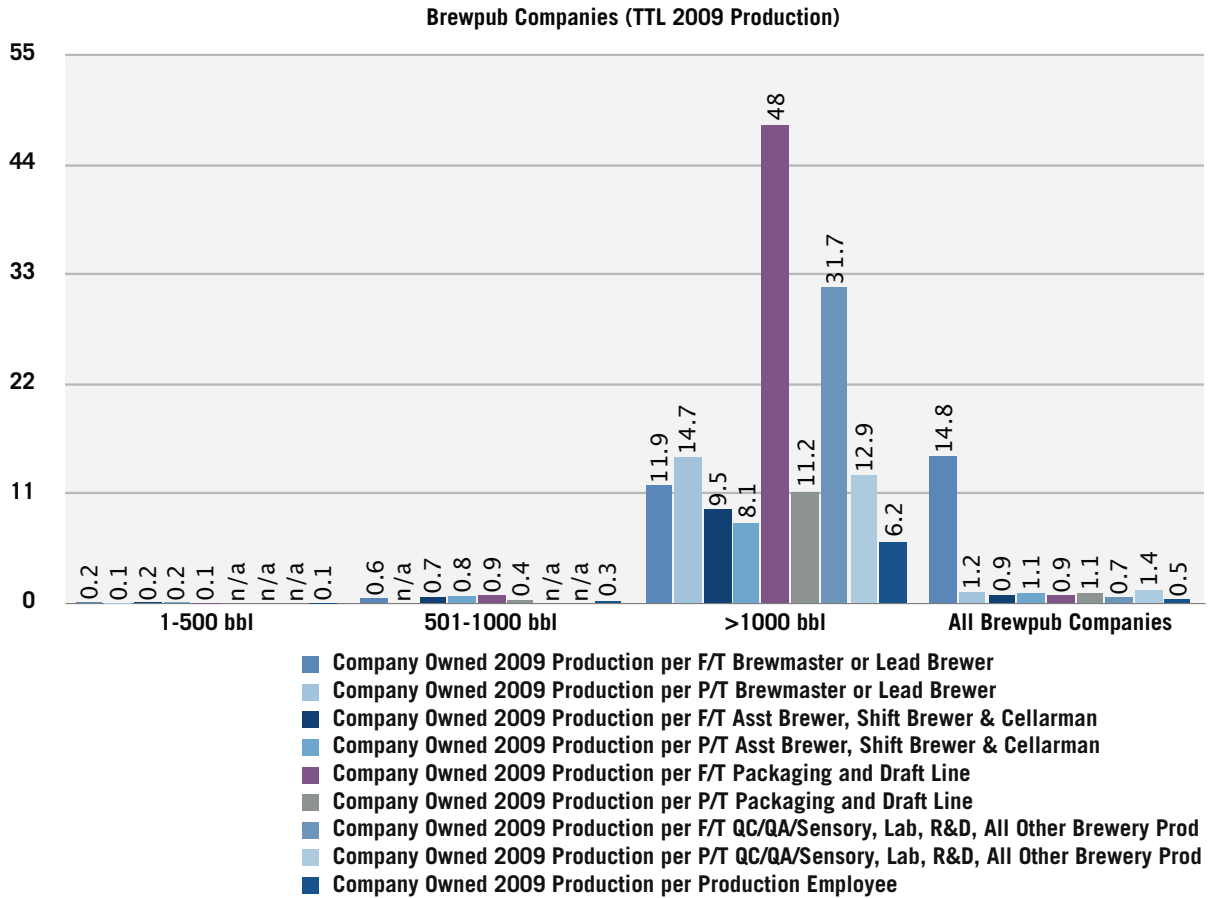
Brewpub Companies (TTL 2009 Production)



Production Breweries (TTL 2009 Production)



49. EMPLOYEE PRODUCTIVITY - 1000 BBL OF COMPANY OWNED 2009 PRODUCTION PER EMPLOYEE



50. EMPLOYEE STAFFING LEVELS - F/T BREWMASTERS OR LEAD BREWERS PER STORE OR PRODUCTION FACILITY

| Brewpub Companies (TTL 2009 Production) | Avg # F/T Brewmasters - Lead Brewer (among brewpubs that indicate >0) | Avg # Stores | Avg F/T Brewmasters - Lead Brewers per Store |
|--|---|---------------------|---|
| 1-500 bbl | 1.1 | 1.0 | 1.1 |
| 501-1000 bbl | 1.2 | 1.1 | 1.1 |
| >1000 bbl | 2.6 | 2.6 | 1.0 |
| All Brewpub Companies | 1.2 | 1.5 | 0.8 |

| Production Breweries (TTL 2009 Production) | Avg # F/T Brewmasters - Lead Brewer (among companies that indicate >0) | Avg # Production Facilities | Avg F/T Brewmasters - Lead Brewers per Production Facility |
|---|--|------------------------------------|---|
| 1-1000 bbl | 1.3 | 1.0 | 1.3 |
| 1001-7500 bbl | 1.3 | 1.1 | 1.2 |
| 7501-50,000 bbl | 2.1 | 1.0 | 2.0 |
| >50,000 bbl | 3.2 | 1.1 | 2.9 |
| All Production Breweries | 1.8 | 1.0 | 1.7 |

51. EMPLOYEE STAFFING LEVELS - P/T BREWMASTERS OR LEAD BREWERS PER STORE OR PRODUCTION FACILITY

| Brewpub Companies (TTL 2009 Production) | Avg # P/T Brewmasters - Lead Brewer (among brewpubs that indicate >0) | Avg # Stores | Avg P/T Brewmasters - Lead Brewers per Store |
|--|---|---------------------|---|
| 1-500 bbl | 1.0 | 1.0 | 1.0 |
| 501-1000 bbl | n/a | n/a | n/a |
| >1000 bbl | 1.3 | 1.0 | 1.3 |
| All Brewpub Companies | 0.1 | 1.0 | 0.1 |

| Production Breweries (TTL 2009 Production) | Avg # P/T Brewmasters - Lead Brewer (among Production Breweries that indicate >0) | Avg # Production Facilities | Avg P/T Brewmasters - Lead Brewers per Production Facility |
|---|---|------------------------------------|---|
| 1-1000 bbl | 1.5 | 1.0 | 1.5 |
| 1001-7500 bbl | 1.0 | 1.0 | 1.0 |
| 7501-50,000 bbl | 1.0 | 1.0 | 1.0 |
| >50,000 bbl | 2.0 | 1.0 | 2.0 |
| All Production Breweries | 1.4 | 1.0 | 1.4 |

52. EMPLOYEE STAFFING LEVELS - F/T ASST BREWERS, SHIFT BREWERS & CELLARMEN PER STORE OR PRODUCTION FACILITY

| Brewpub Companies (TTL 2009 Production) | Avg # F/T Asst Brewer, Shift Brewer & Cellarman (among brewpubs that indicate >0) | Avg # Stores | Avg F/T Asst Brewer, Shift Brewer & Cellarman per Store |
|--|---|---------------------|--|
| 1-500 bbl | 1.3 | 1.0 | 1.3 |
| 501-1000 bbl | 1.1 | 1.3 | 0.9 |
| >1000 bbl | 3.8 | 3.1 | 1.3 |
| All Brewpub Companies | 0.7 | 2.0 | 0.3 |

| Production Breweries (TTL 2009 Production) | Avg # F/T Asst Brewer, Shift Brewer & Cellarman (among Production Breweries that indicate >0) | Avg # Production Facilities | Avg F/T Asst Brewer, Shift Brewer & Cellarman per Production Facility |
|---|---|------------------------------------|--|
| 1-1000 bbl | 1.6 | 1.0 | 1.6 |
| 1001-7500 bbl | 1.7 | 1.1 | 1.5 |
| 7501-50,000 bbl | 4.5 | 1.0 | 4.3 |
| >50,000 bbl | 10.2 | 1.1 | 9.3 |
| All Production Breweries | 4.2 | 1.1 | 3.9 |

53. EMPLOYEE STAFFING LEVELS - P/T ASST BREWERS, SHIFT BREWERS & CELLARMEN PER STORE OR PRODUCTION FACILITY

| Brewpub Companies (TTL 2009 Production) | Avg # P/T Asst Brewer, Shift Brewer & Cellarman (among brewpubs that indicate >0) | Avg # Stores | Avg P/T Asst Brewer, Shift Brewer & Cellarman per Store |
|--|---|---------------------|--|
| 1-500 bbl | 1.0 | 1.0 | 1.0 |
| 501-1000 bbl | 1.0 | 1.2 | 0.8 |
| >1000 bbl | 1.1 | 1.9 | 0.6 |
| All Brewpub Companies | 0.6 | 1.4 | 0.4 |

| Production Breweries (TTL 2009 Production) | Avg # P/T Asst Brewer, Shift Brewer & Cellarman (among Production Breweries that indicate >0) | Avg # Production Facilities | Avg P/T Asst Brewer, Shift Brewer & Cellarman per Production Facility |
|---|---|------------------------------------|--|
| 1-1000 bbl | 1.4 | 1.0 | 1.4 |
| 1001-7500 bbl | 1.1 | 1.0 | 1.1 |
| 7501-50,000 bbl | 1.3 | 1.0 | 1.3 |
| >50,000 bbl | 2.0 | 1.0 | 2.0 |
| All Production Breweries | 1.3 | 1.0 | 1.3 |

54. EMPLOYEE STAFFING LEVELS - F/T PACKAGING AND DRAFT LINE PER STORE OR PRODUCTION FACILITY

| Brewpub Companies (TTL 2009 Production) | Avg # F/T Packaging and Draft Line (among brewpubs that indicate >0) | Avg # Stores | Avg F/T Packaging and Draft Line per Store |
|--|--|---------------------|---|
| 1-500 bbl | 4.0 | 1.0 | 4.0 |
| 501-1000 bbl | 1.0 | 1.0 | 1.0 |
| >1000 bbl | 1.0 | 1.0 | 1.0 |
| All Brewpub Companies | 0.2 | 1.0 | 0.2 |

| Production Breweries (TTL 2009 Production) | Avg # F/T Packaging and Draft Line (among Production Breweries that indicate >0) | Avg # Production Facilities | Avg F/T Packaging and Draft Line per Production Facility |
|---|--|------------------------------------|---|
| 1-1000 bbl | 2.0 | 1.0 | 2.0 |
| 1001-7500 bbl | 2.6 | 1.1 | 2.4 |
| 7501-50,000 bbl | 6.1 | 1.0 | 5.9 |
| >50,000 bbl | 20.1 | 1.1 | 18.4 |
| All Production Breweries | 7.7 | 1.1 | 7.4 |

55. EMPLOYEE STAFFING LEVELS - P/T PACKAGING AND DRAFT LINE PER STORE OR PRODUCTION FACILITY

| Brewpub Companies (TTL 2009 Production) | Avg # P/T Packaging and Draft Line (among brewpubs that indicate >0) | Avg # Stores | Avg P/T Packaging and Draft Line per Store |
|--|--|---------------------|---|
| 1-500 bbl | n/a | n/a | n/a |
| 501-1000 bbl | 1.8 | 1.0 | 1.8 |
| >1000 bbl | 1.3 | 1.5 | 0.8 |
| All Brewpub Companies | 0.4 | 1.3 | 0.3 |

| Production Breweries (TTL 2009 Production) | Avg # P/T Packaging and Draft Line (among Production Breweries that indicate >0) | Avg # Production Facilities | Avg P/T Packaging and Draft Line per Production Facility |
|---|--|------------------------------------|---|
| 1-1000 bbl | 1.4 | 1.0 | 1.4 |
| 1001-7500 bbl | 2.3 | 1.1 | 2.2 |
| 7501-50,000 bbl | 2.5 | 1.0 | 2.5 |
| >50,000 bbl | 5.0 | 1.0 | 5.0 |
| All Production Breweries | 2.4 | 1.0 | 2.4 |

56. EMPLOYEE STAFFING LEVELS - F/T QC/QA/SENSORY, LAB, R&D, ALL OTHER BREWERY PROD PER STORE OR PRODUCTION FACILITY

| Brewpub Companies (TTL 2009 Production) | Avg # F/T QC/QA/ Sensory, Lab, R&D, All Other Brewery Prod (among brewpubs that indicate >0) | Avg # Stores | Avg F/T QC/QA/Sensory, Lab, R&D, All Other Brewery Prod per Store |
|---|--|--------------|---|
| 1-500 bbl | n/a | n/a | n/a |
| 501-1000 bbl | n/a | n/a | n/a |
| >1000 bbl | 1.5 | 1.0 | 1.5 |
| All Brewpub Companies | 0.1 | 1.0 | 0.1 |

| Production Breweries (TTL 2009 Production) | Avg # F/T QC/QA/Sensory, Lab, R&D, All Other Brewery Prod (among Production Breweries that indicate >0) | Avg # Production Facilities | Avg F/T QC/QA/Sensory, Lab, R&D, All Other Brewery Prod per Production Facility |
|--|---|-----------------------------|---|
| 1-1000 bbl | 1.3 | 1.0 | 1.3 |
| 1001-7500 bbl | 1.5 | 1.3 | 1.2 |
| 7501-50,000 bbl | 1.8 | 1.0 | 1.7 |
| >50,000 bbl | 7.4 | 1.1 | 6.8 |
| All Production Breweries | 3.1 | 1.1 | 2.9 |

57. EMPLOYEE STAFFING LEVELS - P/T QC/QA/SENSORY, LAB, R&D, ALL OTHER BREWERY PROD PER STORE OR PRODUCTION FACILITY

| Brewpub Companies (TTL 2009 Production) | Avg # P/T QC/QA/ Sensory, Lab, R&D, All Other Brewery Prod (among brewpubs that indicate >0) | Avg # Stores | Avg P/T QC/QA/Sensory, Lab, R&D, All Other Brewery Prod per Store |
|---|--|--------------|---|
| 1-500 bbl | n/a | n/a | n/a |
| 501-1000 bbl | n/a | n/a | n/a |
| >1000 bbl | 2.0 | 3.0 | 0.7 |
| All Brewpub Companies | 0.1 | 3.0 | 0.0 |

| Production Breweries (TTL 2009 Production) | Avg # P/T QC/QA/Sensory, Lab, R&D, All Other Brewery Prod (among Production Breweries that indicate >0) | Avg # Production Facilities | Avg P/T QC/QA/Sensory, Lab, R&D, All Other Brewery Prod per Production Facility |
|--|---|-----------------------------|---|
| 1-1000 bbl | 2.8 | 1.0 | 2.8 |
| 1001-7500 bbl | 1.2 | 1.0 | 1.2 |
| 7501-50,000 bbl | 1.1 | 1.0 | 1.1 |
| >50,000 bbl | 2.0 | 1.0 | 2.0 |
| All Production Breweries | 1.7 | 1.0 | 1.7 |