



**KEY:**

<b>Anonymity</b>	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.
<b>Brewery Production Employees</b>	For purposes of this survey, these are Brewmaster/Head Brewers, Shift Brewers, Cellarmen, QA/QC/Sensory, Lab and R&D employees.
<b>Brewpub</b>	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.
<b>Brewpub Sizes</b>	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.
<b>Full-Time Employee</b>	For purposes of this survey, full-time employees are those working >30 hours per week or salaried.
<b>Max</b>	The largest value among all responses
<b>Mean</b>	The “average” value of survey responses to a given question. The total of all responses given, divided by the number of responses
<b>Median</b>	The “middle” response. An equal number of larger and smaller values were given as responses
<b>Min</b>	The smallest value among all responses
<b>Mode</b>	The most common answer to a question
<b>Non-Production, Sales and Marketing Employees</b>	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
<b>Part-Time Employee</b>	For purposes of this survey, part-time employees are those working <30 hours per week.
<b>Production Brewery</b>	A production brewery, contract brewing company or alternating proprietorship that is not a brewpub.
<b>Production Brewery Sizes</b>	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.
<b>Respondents</b>	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.
<b>Restaurant Employees</b>	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

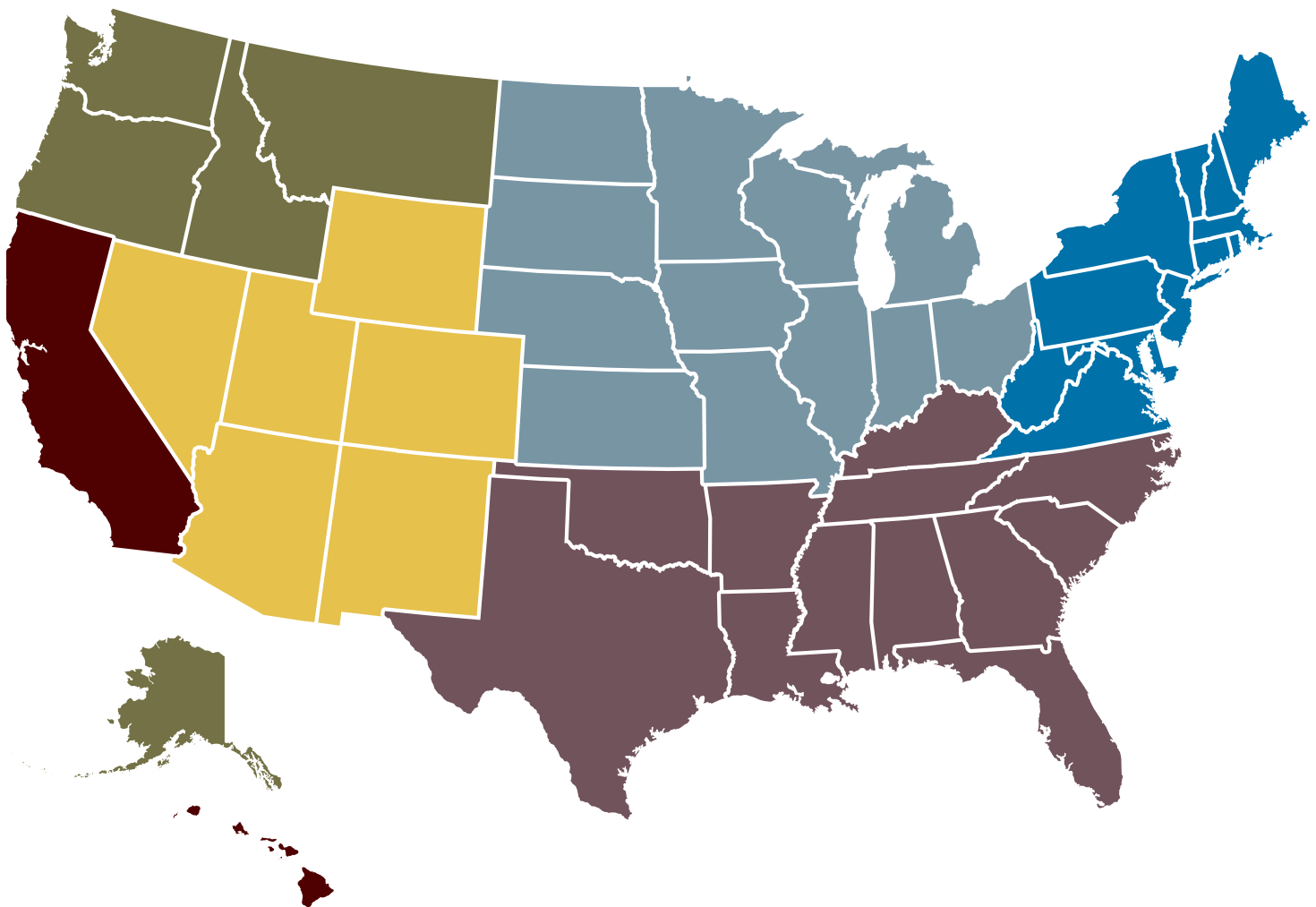
**Mountain West** Arizona, Colorado, Nevada, New Mexico, Utah, Wyoming

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

**Pacific** California, Hawaii

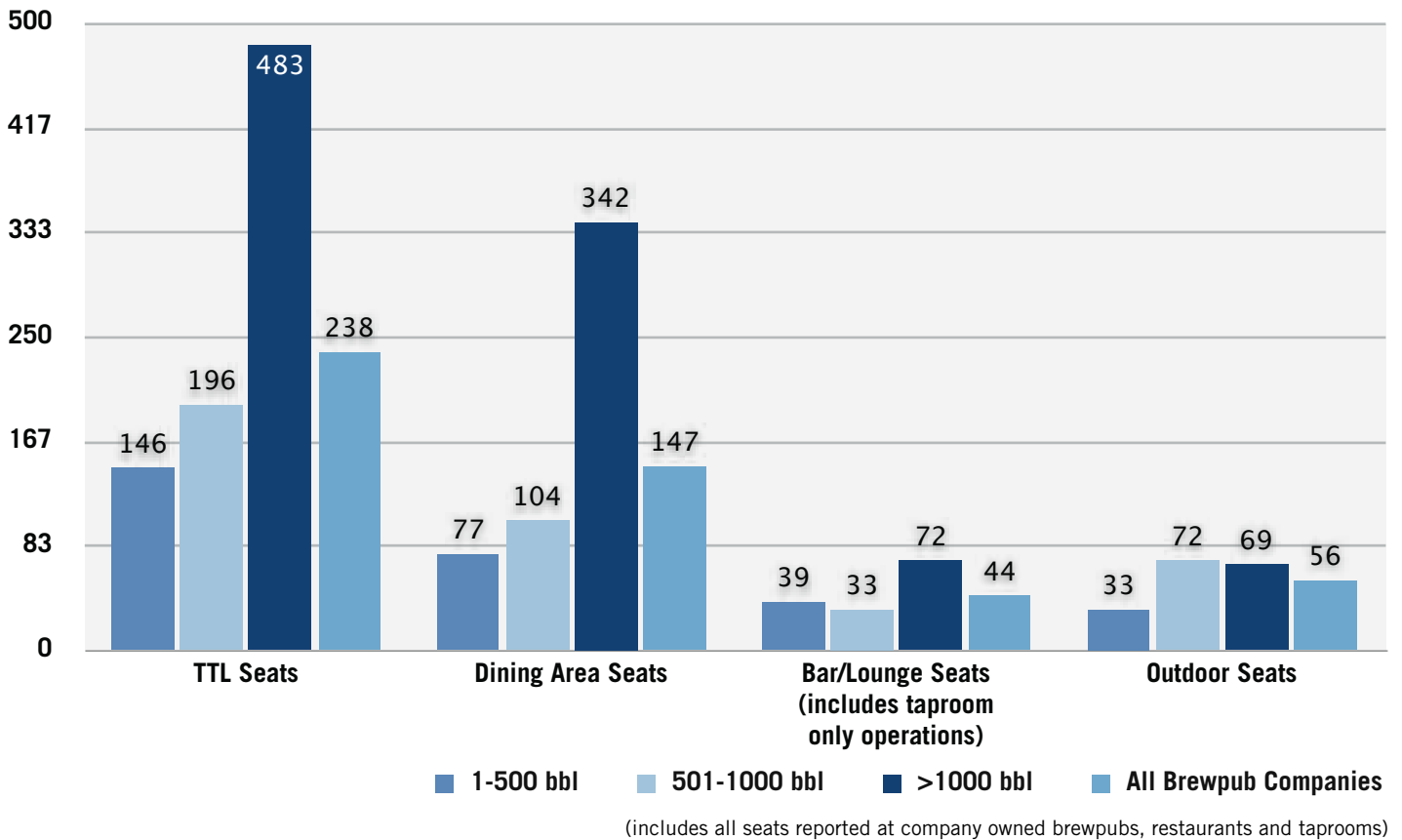
**Pacific NW** Alaska, Idaho, Montana, Oregon, Washington

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

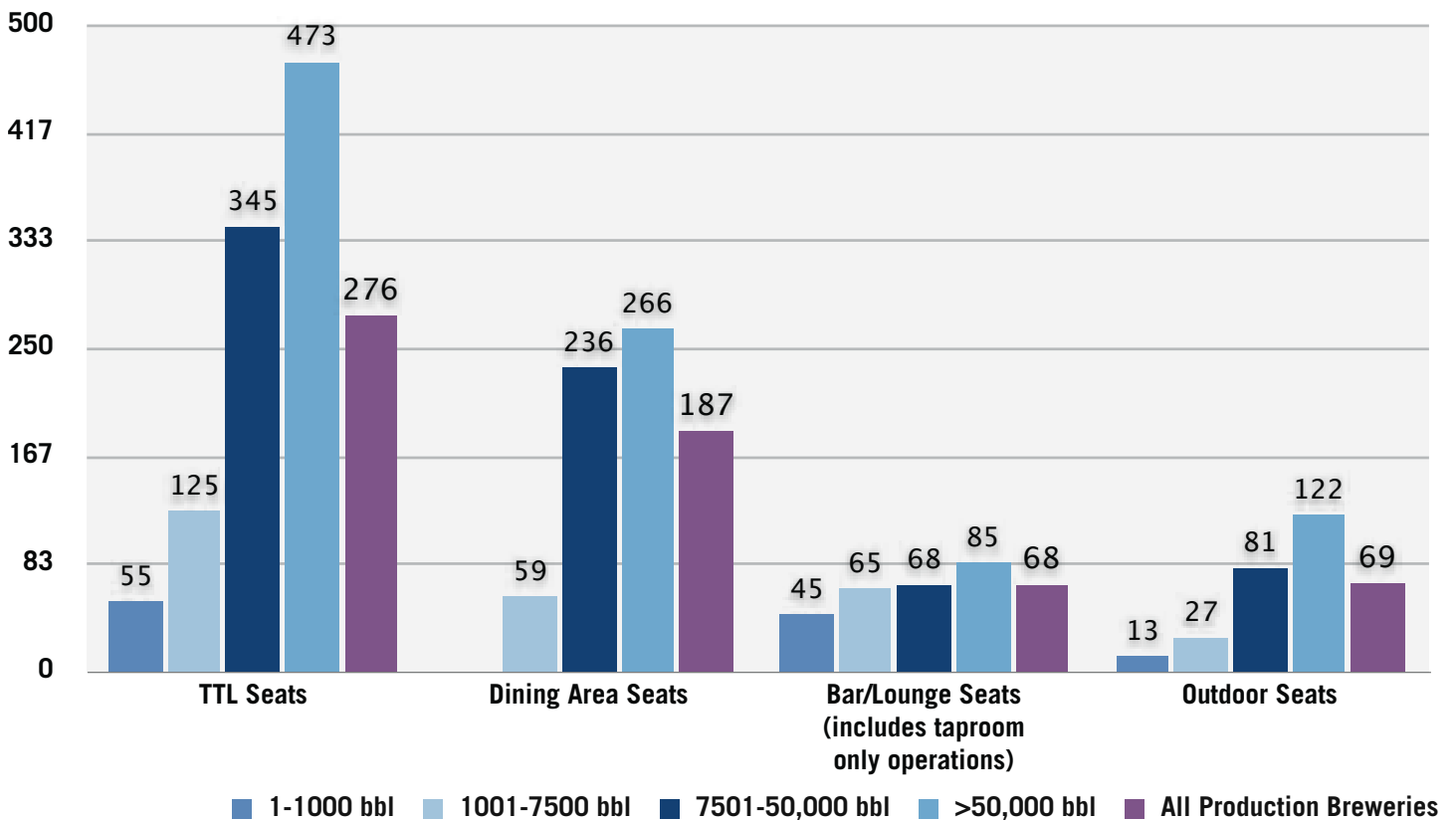


## 70. AVERAGE TTL RESTAURANT, PUB AND TAPROOM SEATS

**Brewpub Companies (TTL 2009 Production)**

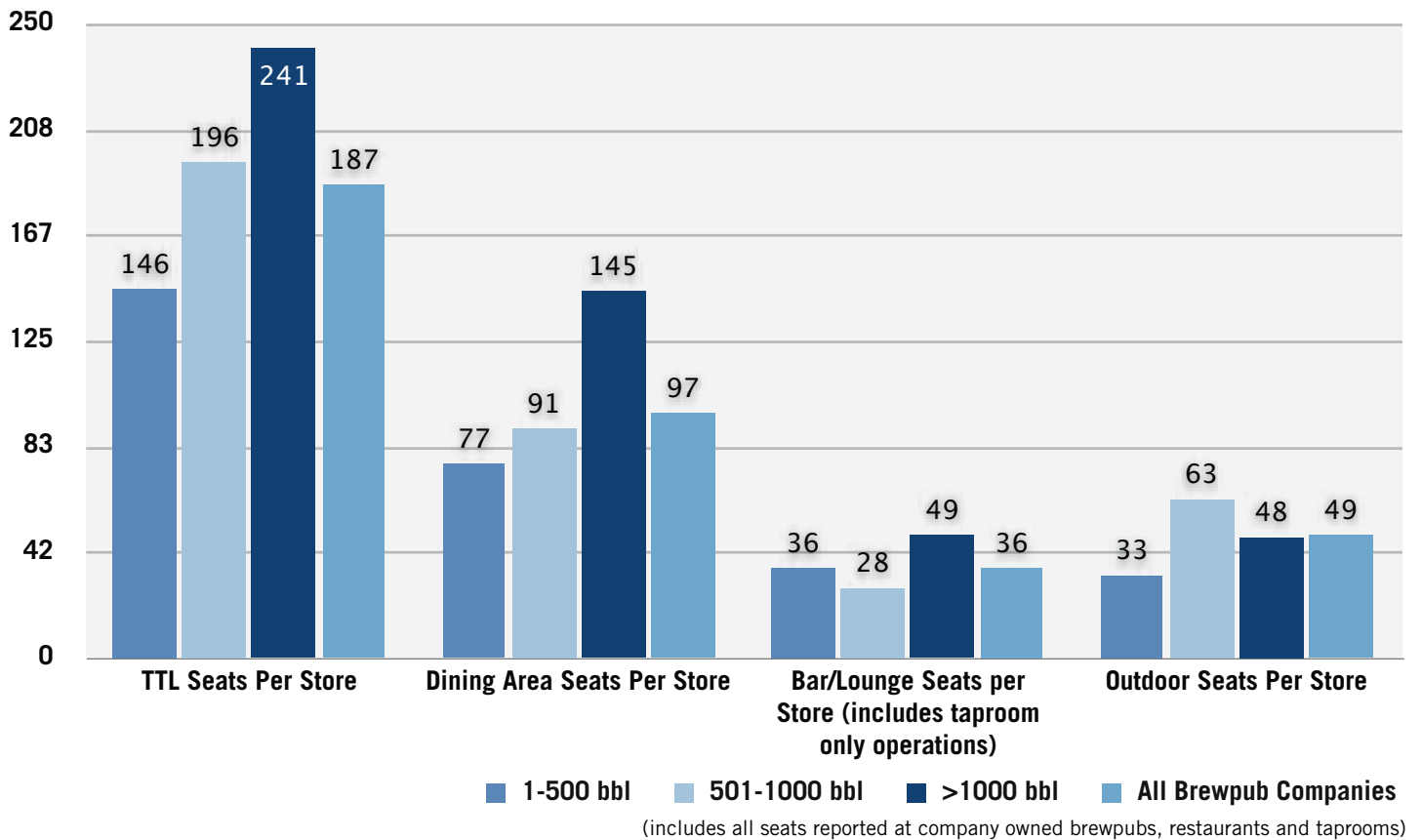


**Production Breweries (TTL 2009 Production)**

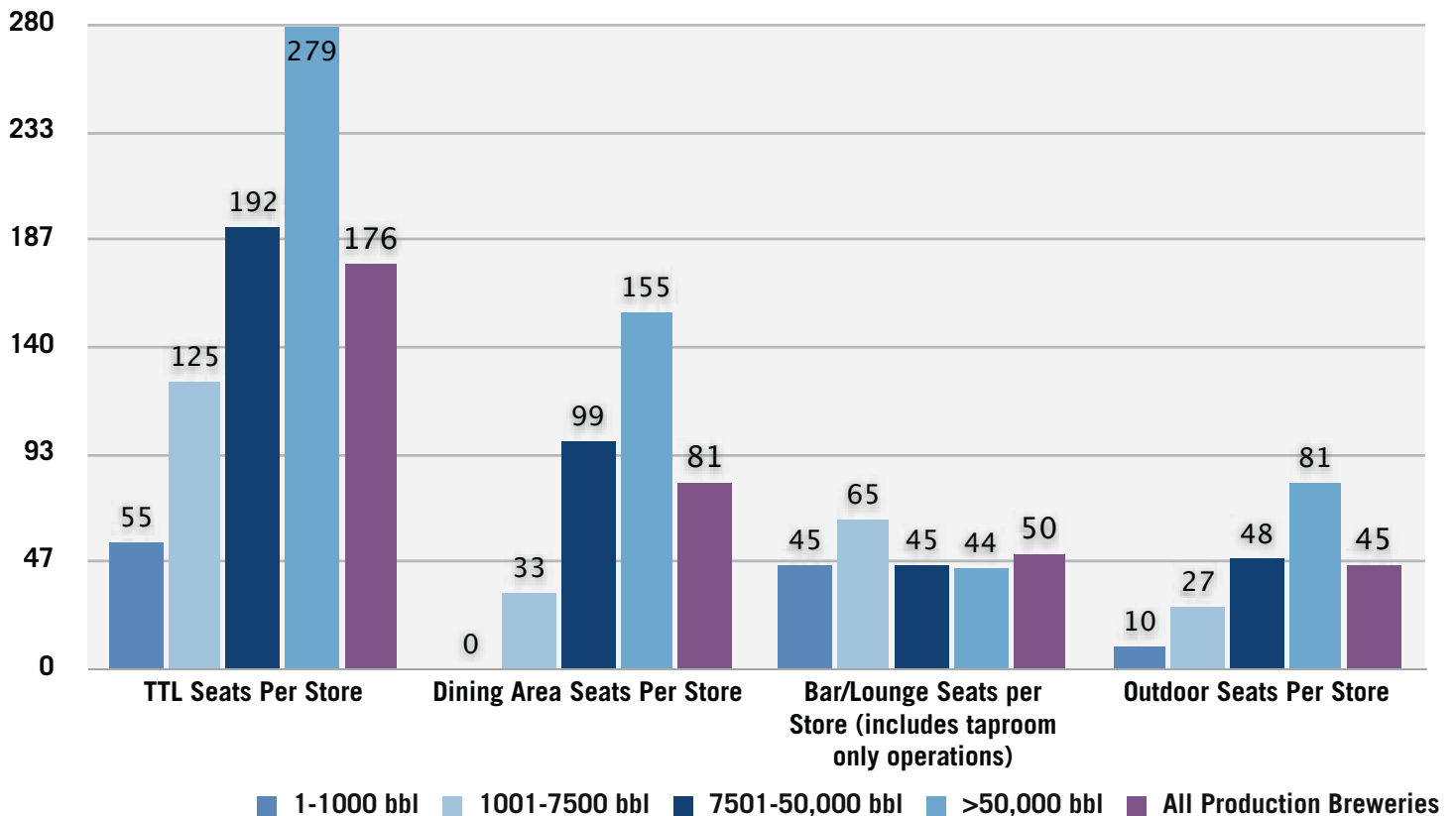


## 71. AVERAGE PER STORE RESTAURANT, PUB AND TAPROOM SEATS

### Brewpub Companies (TTL 2009 Production)

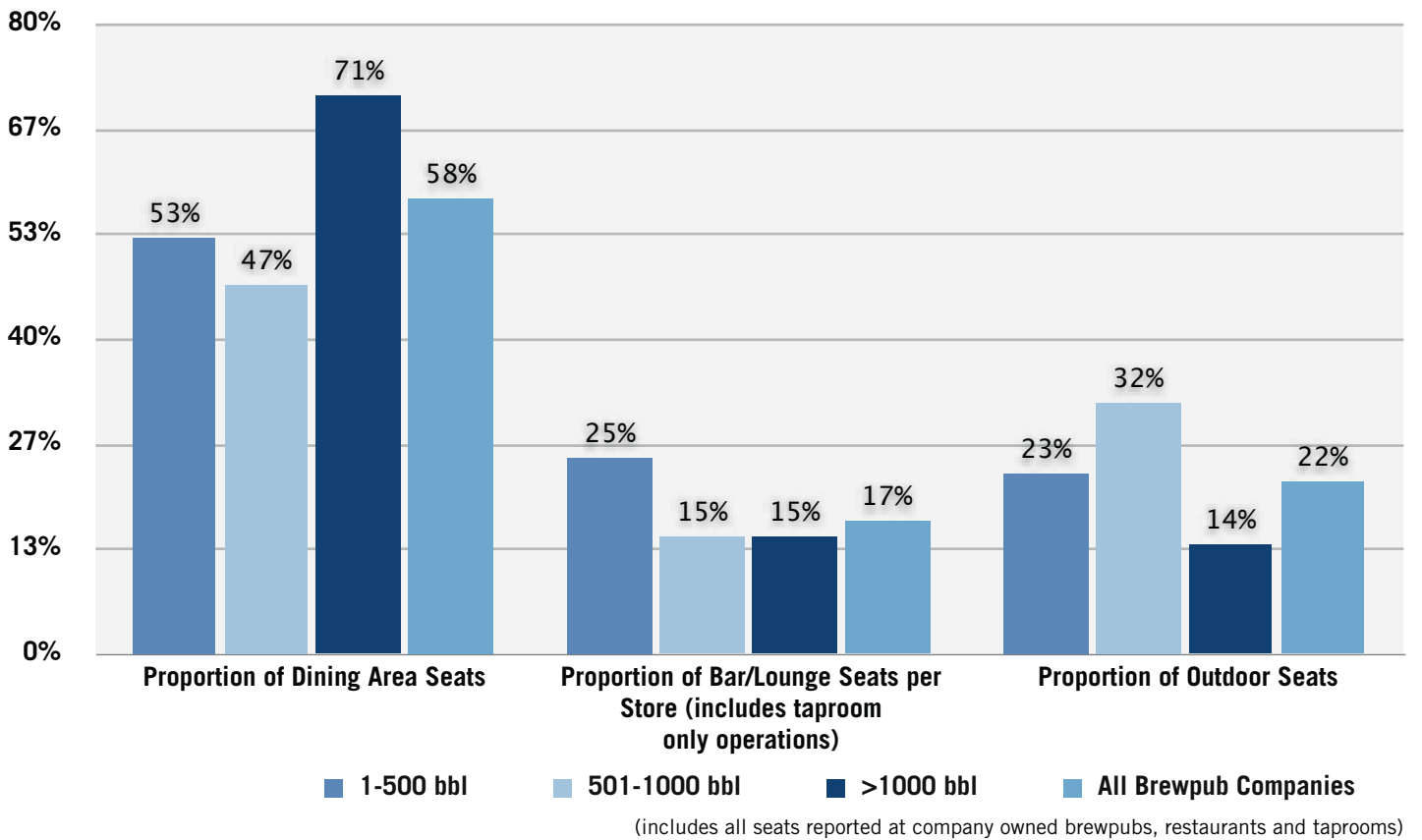


### Production Breweries (TTL 2009 Production)

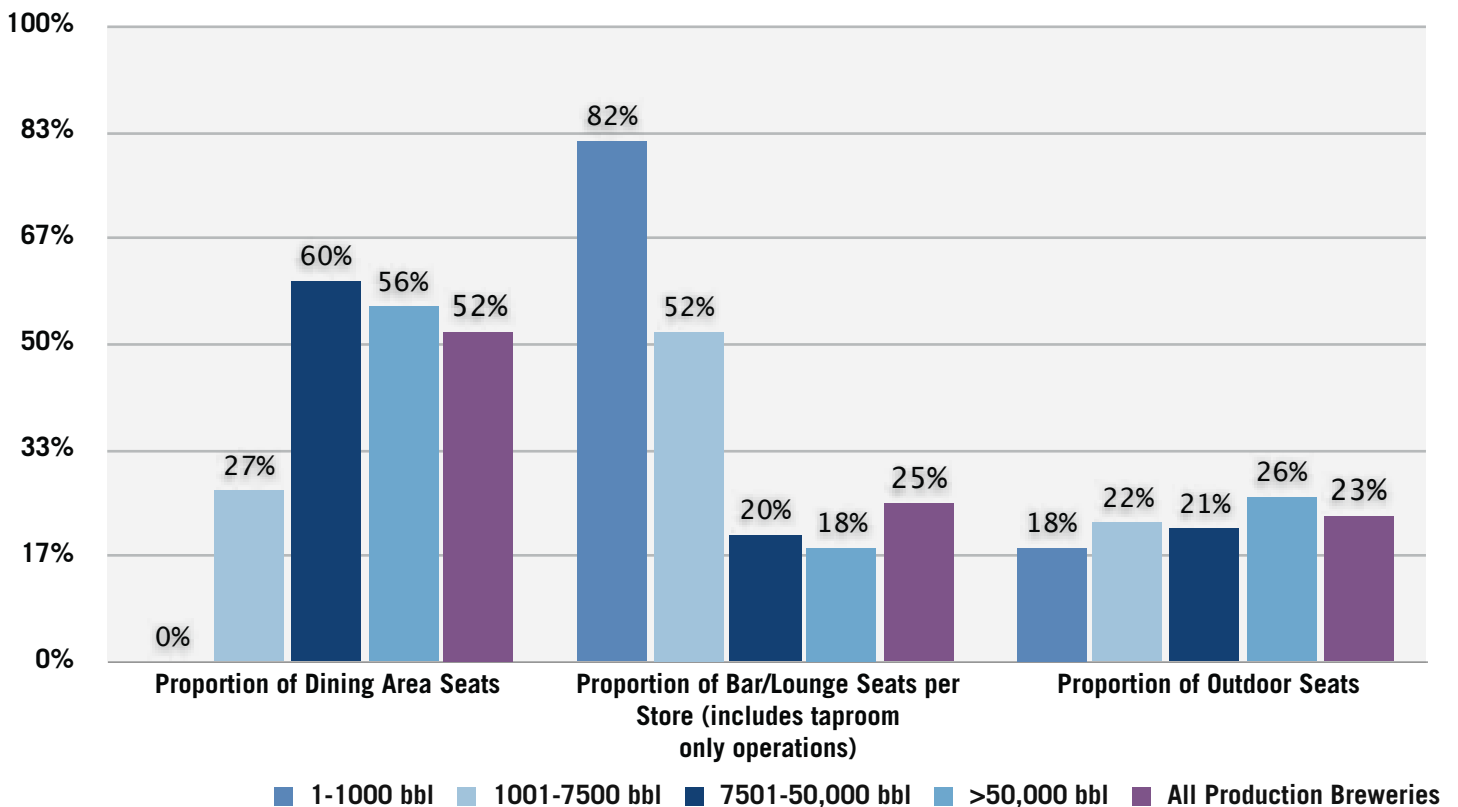


## 72. AVERAGE PROPORTION OF DINING, BAR/LOUNGE, AND OUTDOOR SEATS

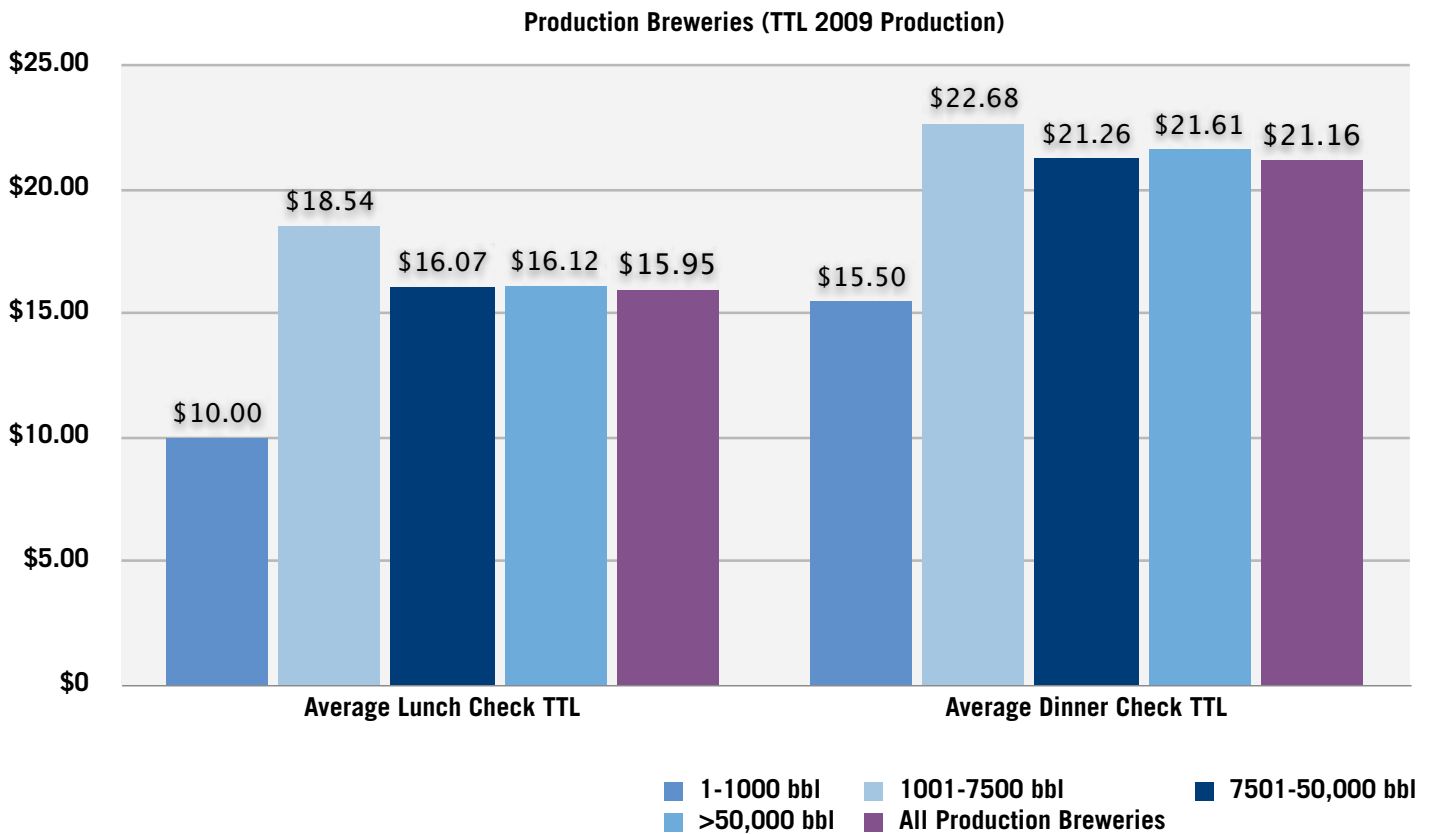
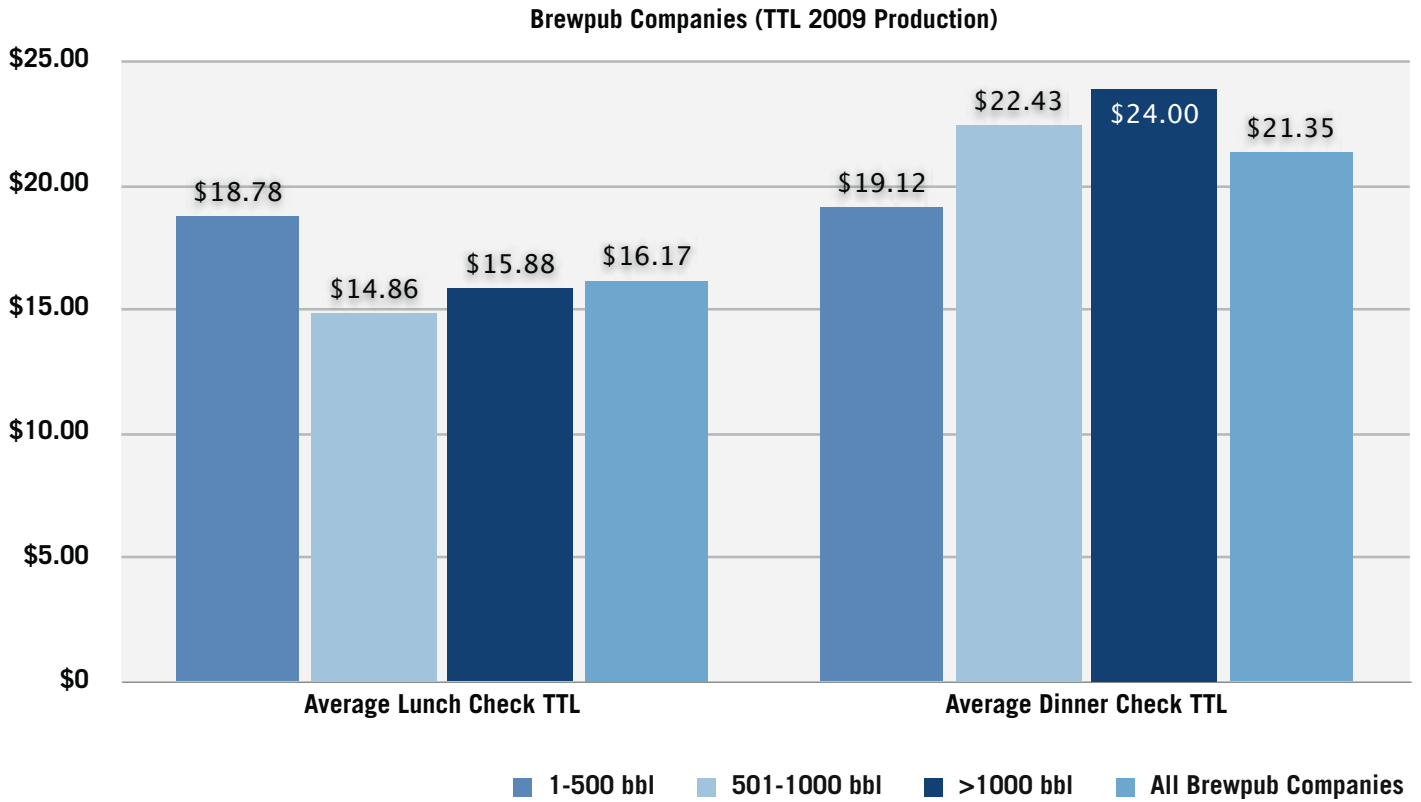
**Brewpub Companies (TTL 2009 Production)**



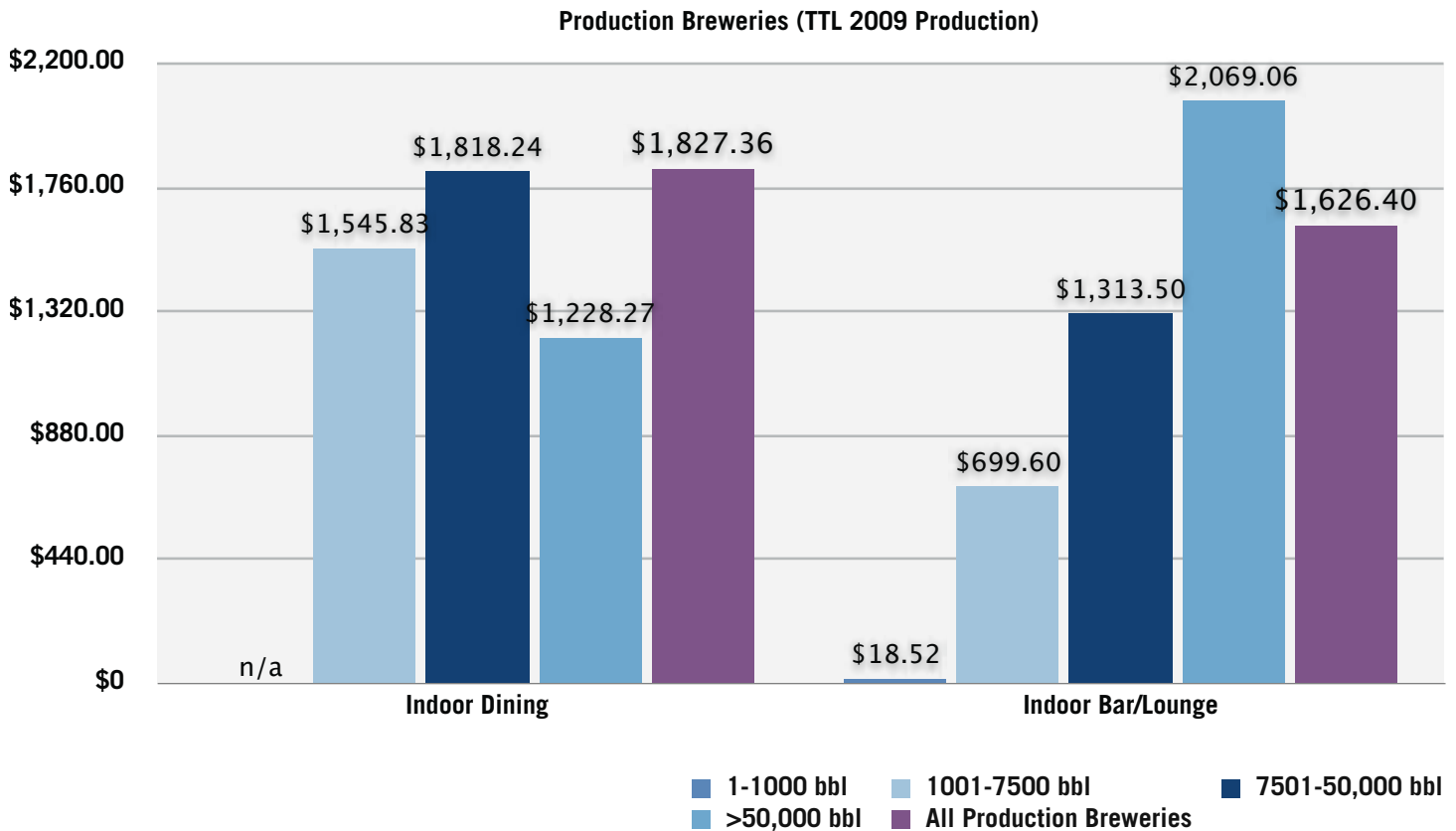
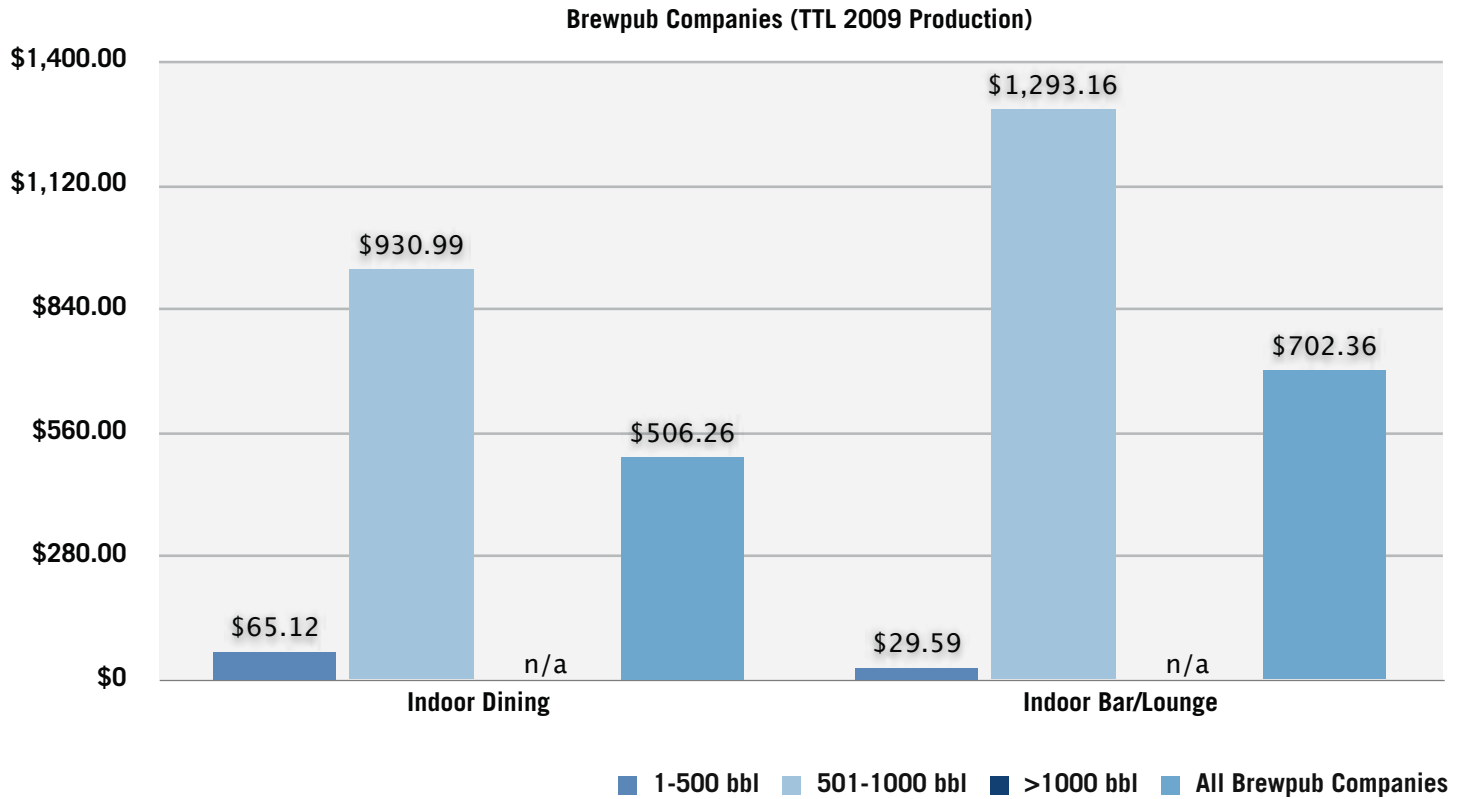
**Production Breweries (TTL 2009 Production)**



### 73. AVERAGE LUNCH AND DINNER CHECK TTLS



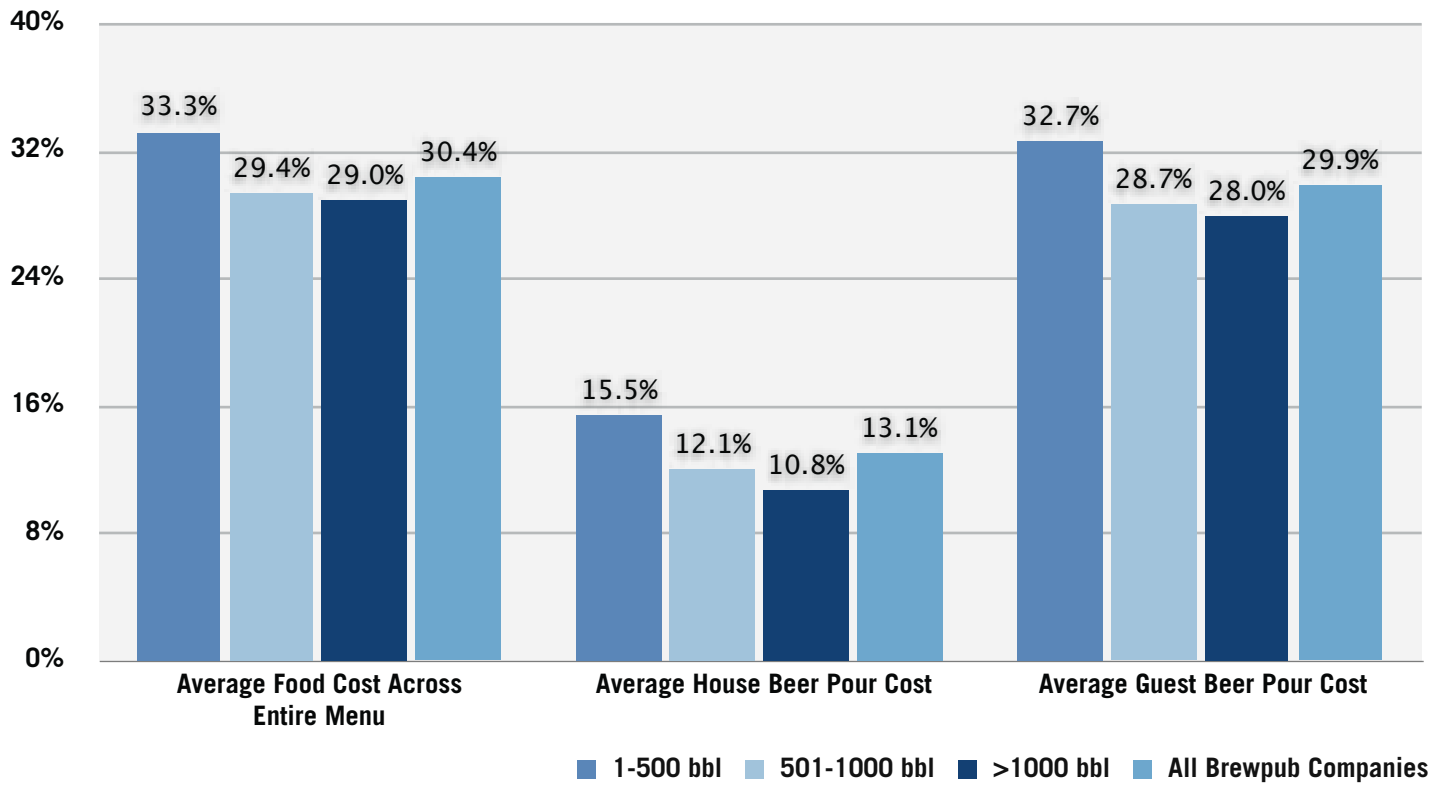
## 74. AVERAGE MONTHLY REVENUE PER SEAT



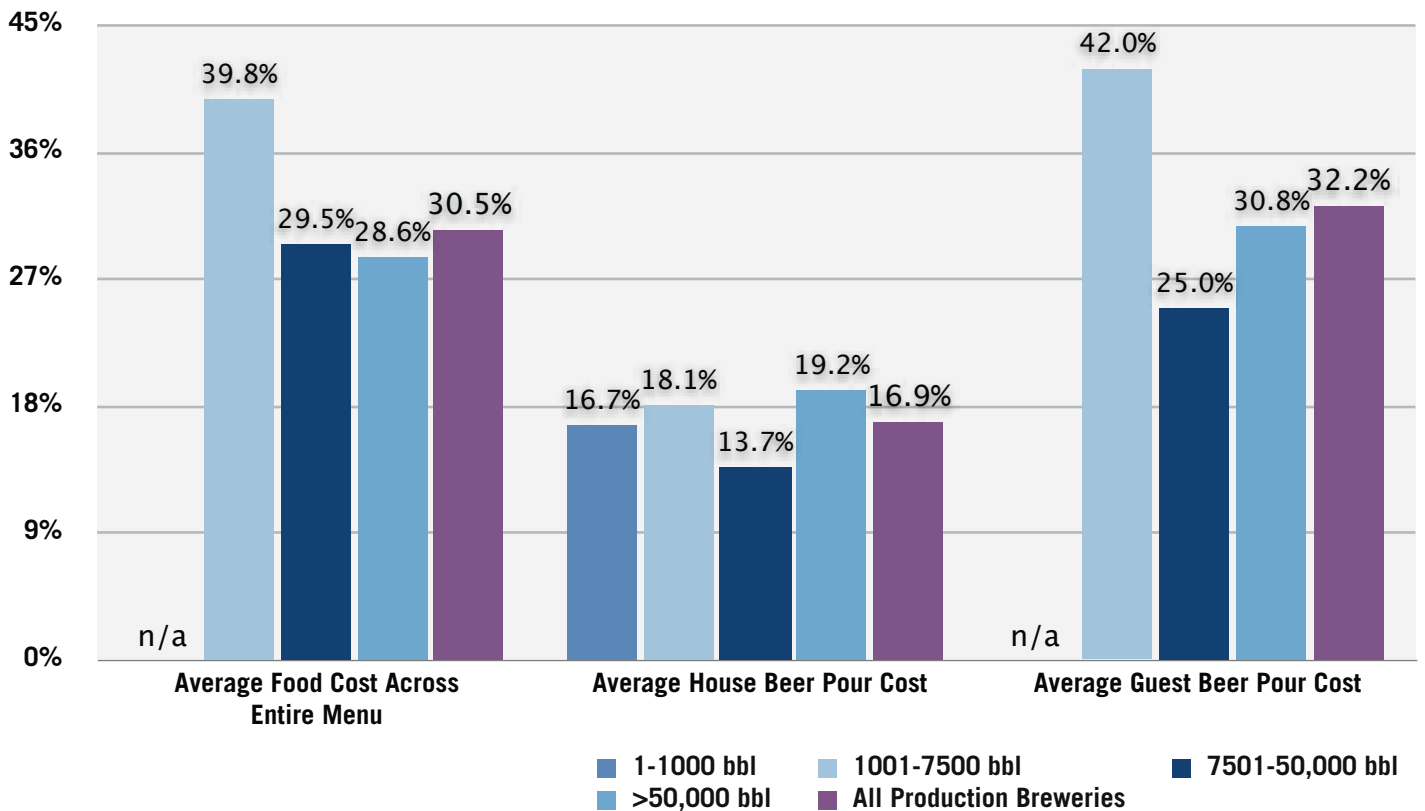


## 75. AVERAGE FOOD & BEER COSTS

Brewpub Companies (TTL 2009 Production)



Production Breweries (TTL 2009 Production)



## 76. AVERAGE OUTDOOR SEATS BY REGION AND AVAILABILITY

<b>Brewpub Companies (TTL 2009 Production)</b>	<b>All Regions - Avg Number of Outdoor Seats per Store</b>	<b>All Regions - Avg Number of Months Available</b>	<b>Midwest - Avg Number of Outdoor Seats per Store</b>	<b>Midwest - Avg Number of Months Available</b>	<b>Mountain West - Avg Number of Outdoor Seats per Store</b>	<b>Mountain West - Avg Number of Months Available</b>	<b>Northeast - Avg Number of Outdoor Seats per Store</b>	<b>Northeast - Avg Number of Months Available</b>	<b>Pacific - Avg Number of Outdoor Seats per Store</b>	<b>Pacific - Avg Number of Months Available</b>	<b>Pacific NW - Avg Number of Outdoor Seats per Store</b>	<b>Pacific NW - Avg Number of Months Available</b>	<b>South - Avg Number of Outdoor Seats per Store</b>	<b>South - Avg Number of Months Available</b>
1-500 bbl	33	5.9	42	6.0	19	10.0	8	5.0	n/a	n/a	46	4.0	54	8.0
501-1000 bbl	63	7.5	46	5.7	110	5.3	20	5.0	38	10.8	0	4.0	150	10.0
>1000 bbl	48	6.1	35	4.0	55	6.5	57	6.7	n/a	n/a	40	5.0	25	7.0
All Brewpub Companies	49	6.6	49	6.6	49	6.6	49	6.6	49	6.6	49	6.6	49	6.6

<b>Production Breweries (TTL 2009 Production)</b>	<b>All Regions - Avg Number of Outdoor Seats per Store</b>	<b>All Regions - Avg Number of Months Available</b>	<b>Midwest - Avg Number of Outdoor Seats per Store</b>	<b>Midwest - Avg Number of Months Available</b>	<b>Mountain West - Avg Number of Outdoor Seats per Store</b>	<b>Mountain West - Avg Number of Months Available</b>	<b>Northeast - Avg Number of Outdoor Seats per Store</b>	<b>Northeast - Avg Number of Months Available</b>	<b>Pacific - Avg Number of Outdoor Seats per Store</b>	<b>Pacific - Avg Number of Months Available</b>	<b>Pacific NW - Avg Number of Outdoor Seats per Store</b>	<b>Pacific NW - Avg Number of Months Available</b>	<b>South - Avg Number of Outdoor Seats per Store</b>	<b>South - Avg Number of Months Available</b>
1-1000 bbl	10	7.0	0	n/a	40	7.0	n/a	n/a	n/a	n/a	0	n/a	n/a	n/a
1001-7500 bbl	27	6.2	33	8.0	15	5.0	n/a	n/a	n/a	n/a	23	3.5	40	11.0
7501-50,000 bbl	48	7.0	32	5.0	81	7.0	0	n/a	63	9.0	n/a	n/a	n/a	n/a
>50,000 bbl	81	7.1	103	3.0	n/a	n/a	28	6.0	131	10.7	20	4.5	n/a	n/a
All Production Breweries	45	6.8	33	5.3	54	6.5	14	6.0	104	10.0	18	4.0	40	11.0

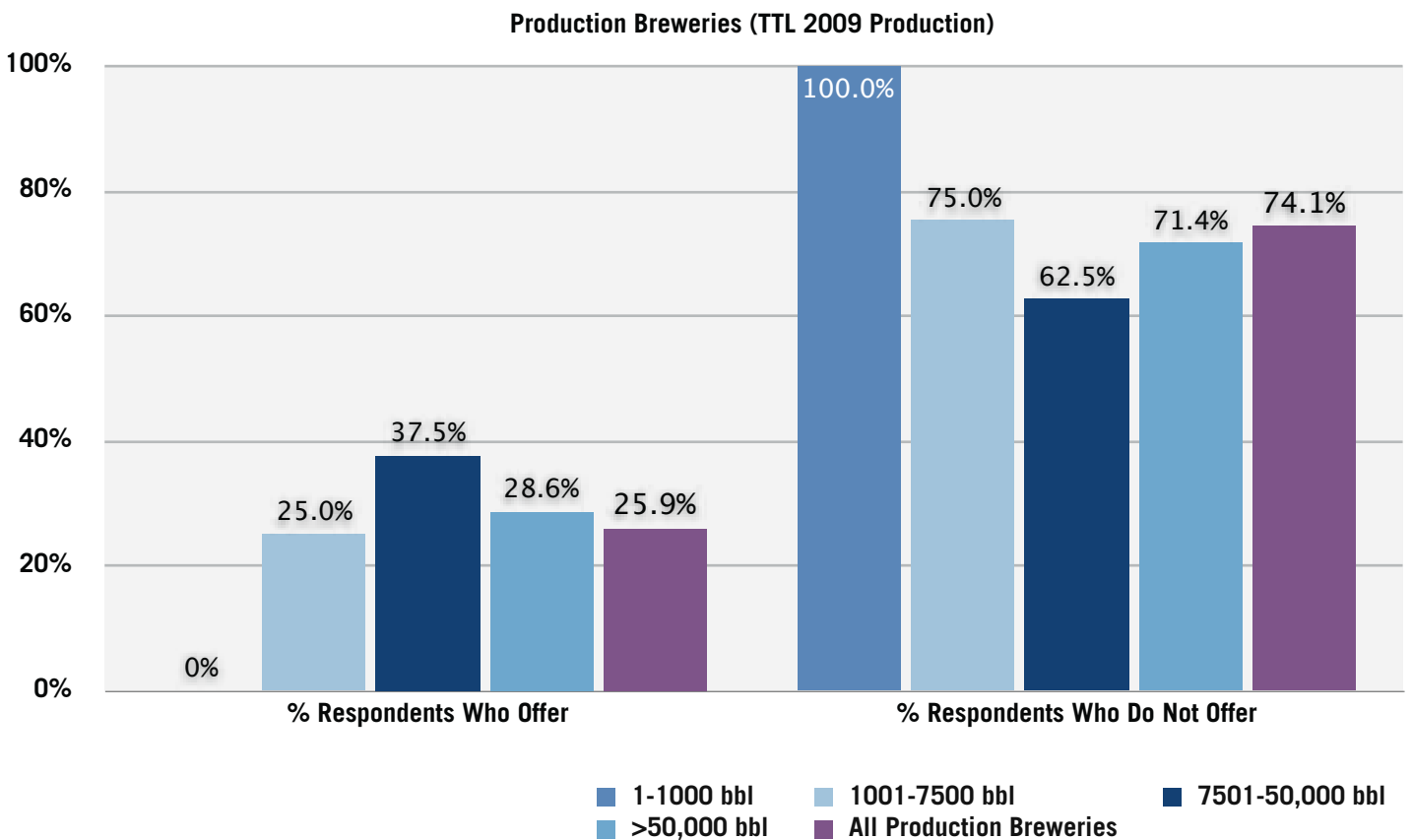
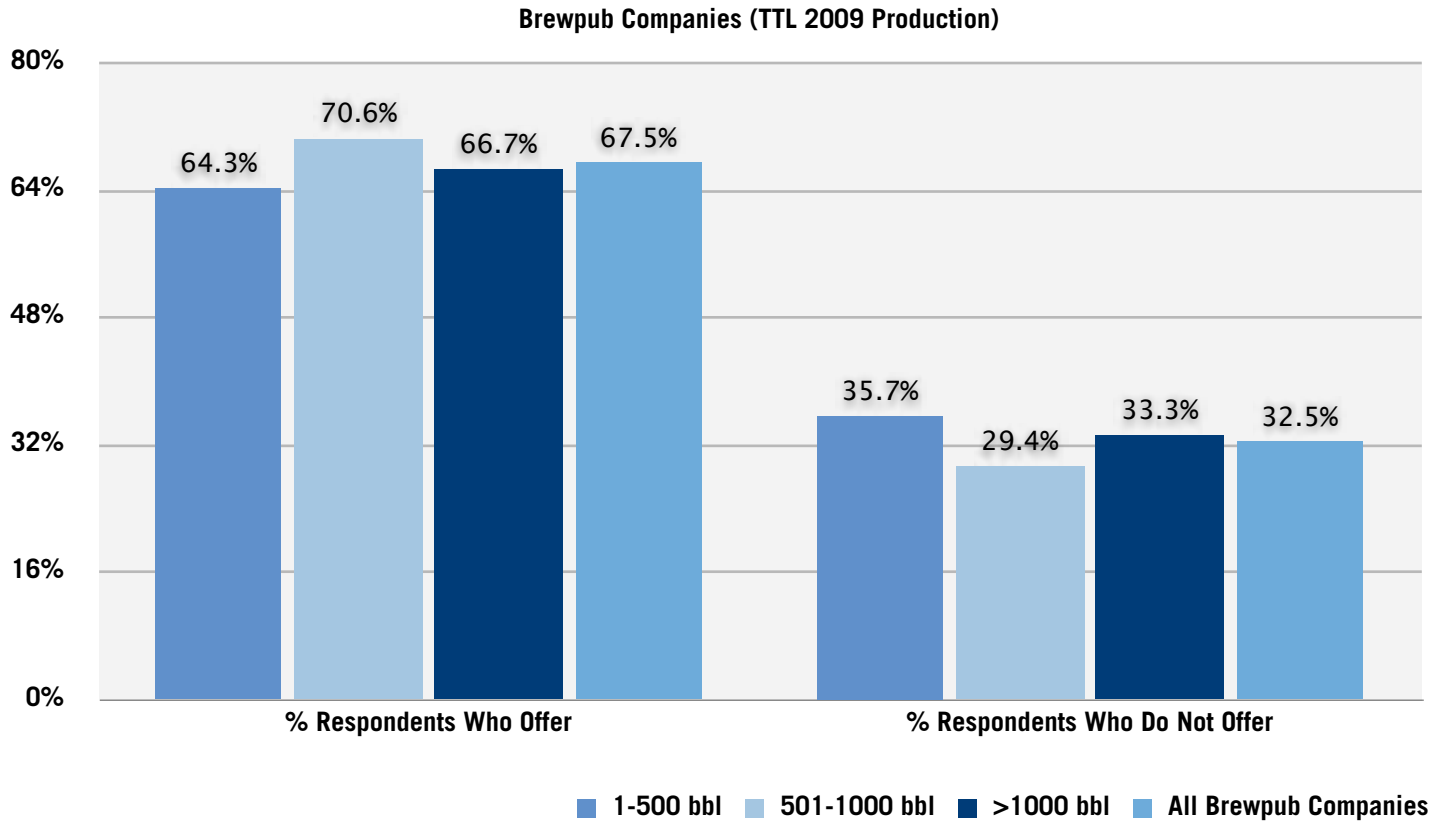
## 77. AVERAGE PROPORTION OF SALES OF FOOD, BEERS AND OTHER

<b>Brewpub Companies (TTL 2009 Production)</b>	<b>Food Sales %</b>	<b>House Beer %</b>	<b>Guest Beer %</b>	<b>All Other Bar Sales %</b>
1-500 bbl	52.5%	36.0%	7.0%	4.5%
501-1000 bbl	52.6%	34.8%	3.1%	9.5%
>1000 bbl	54.8%	35.6%	0.4%	9.2%
All Brewpub Companies	53.0%	35.4%	4.0%	7.6%

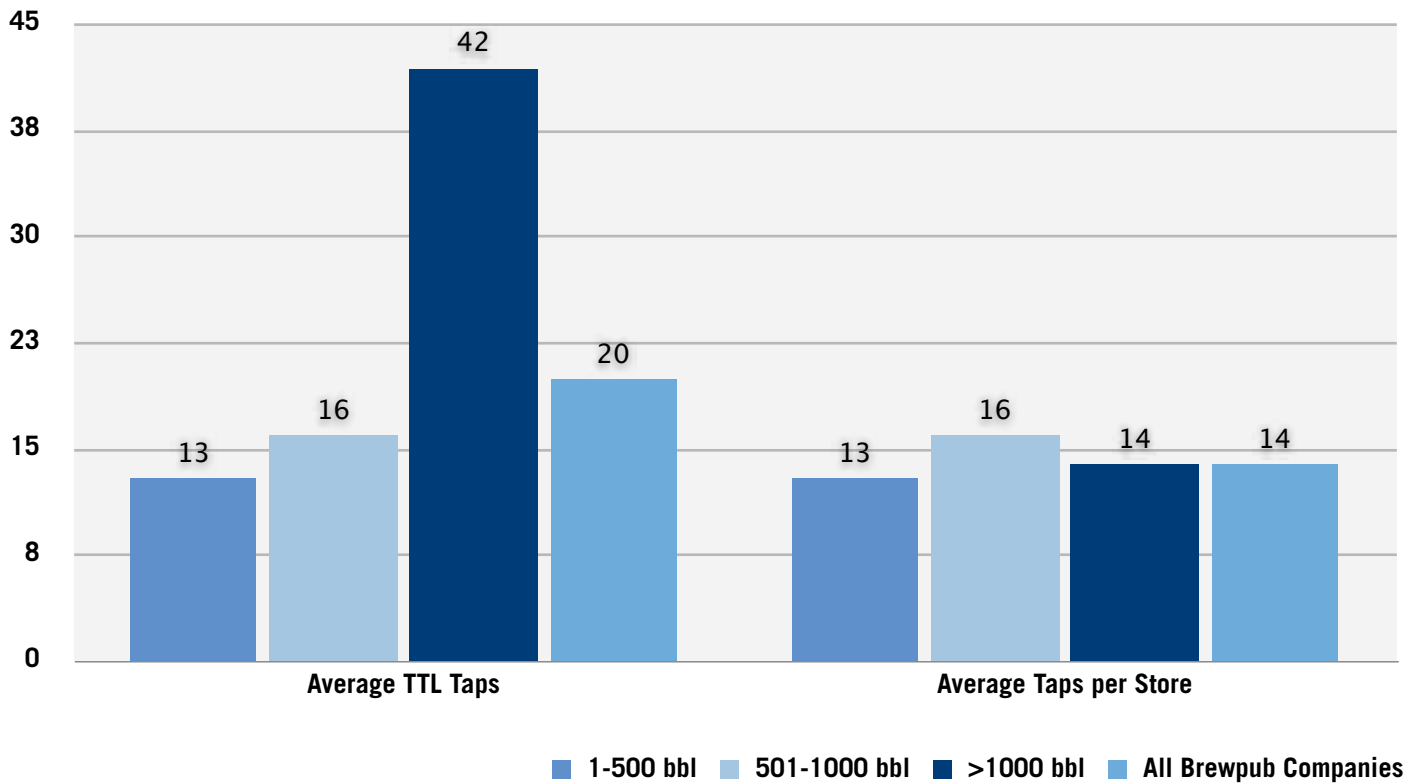
<b>Production Breweries (TTL 2009 Production)</b>	<b>Food Sales %</b>	<b>House Beer %</b>	<b>Guest Beer %</b>	<b>All Other Bar Sales %</b>
1-1000 bbl	0.0%	100.0%	0.0%	0.0%
1001-7500 bbl	19.4%	77.2%	0.4%	3.0%
7501-50,000 bbl	50.0%	39.3%	3.5%	7.2%
>50,000 bbl	59.0%	32.3%	2.1%	6.6%
All Production Breweries	38.6%	54.7%	1.8%	5.0%

## 78. GUEST BEERS OFFERED AT COMPANY OWNED PUBS, RESTAURANTS, TAP ROOMS



## 79. NUMBER OF TAPS IN COMPANY OWNED PUBS, RESTAURANTS AND TAP ROOMS

Brewpub Companies (TTL 2009 Production)



Production Breweries (TTL 2009 Production)

