For the first time in over a decade, the Brewers Association conducted a comprehensive survey of America’s craft brewers to establish and share industry benchmarks and best practices. This survey was developed in response to Brewers Association member requests for hard data to focus on efficiencies that they could use to measure their businesses and in turn make them more successful.

Questions were developed by a cross section of brewing industry members with many different perspectives. Results were compiled and aggregated by a third party independent contractor. The results provide a valuable set of tools specific to America’s small and independent craft brewers.

Special thanks go out to the following Brewers’ Resource Directory Benchmarking Survey committee members for their huge investment of time and thought they have contributed to this project:

Jennifer Busch & Mattson Davis, Kona Brewing Co.
Kevin Finn, Iron Hill Brewery & Restaurant
Gary Fish and Pat Gerhardt, Deschutes Brewery
Lauri Honea, MicroStar Keg Management
Lester Jones, Beer Institute
Janet Lightner, Boundary Bay Brewing Co.
RB Brandvold, Rogue Ales
Brock Wagner, St. Arnold Brewing Co.

Thank you to all who participated and may you find value in these results to help you grow with the industry. This is, indeed, an exciting time to be in the craft beer industry!

Sincerely,

Paul Gatza
Brewers Association

Kristi Switzer
Brewers Publications

Chris Swersey
Technical Brewing Projects Coordinator
**KEY:**

**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 *uir* (“unreported”), indicates an answer that is not provided in order to protect the anonymity of survey respondents.

**Brewery Production Enterprises**
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:

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
Benchmarking and Best Practices survey results

70. AVERAGE TTL RESTAURANT, PUB AND TAPROOM SEATS

### Brewhub Companies (TTL 2009 Production)

- **TTL Seats**: 146, 196, 238, 483
- **Dining Area Seats**: 77, 104, 147, 342
- **Bar/Lounge Seats** (includes taproom only operations): 39, 33, 44, 72
- **Outdoor Seats**: 33, 72, 69, 56

### Production Breweries (TTL 2009 Production)

- **TTL Seats**: 55, 125, 276, 473
- **Dining Area Seats**: 59, 236, 266, 187
- **Bar/Lounge Seats** (includes taproom only operations): 45, 65, 68, 85
- **Outdoor Seats**: 13, 27, 81, 122

*Includes all seats reported at company owned brewpubs, restaurants and taprooms*
71. AVERAGE PER STORE RESTAURANT, PUB AND TAPROOM SEATS

### Brewpub Companies (TTL 2009 Production)

<table>
<thead>
<tr>
<th>Category</th>
<th>1-500 bbl</th>
<th>501-1000 bbl</th>
<th>&gt;1000 bbl</th>
<th>All Brewpub Companies</th>
</tr>
</thead>
<tbody>
<tr>
<td>TTL Seats Per Store</td>
<td>146</td>
<td>196</td>
<td>241</td>
<td>187</td>
</tr>
<tr>
<td>Dining Area Seats Per Store</td>
<td>77</td>
<td>91</td>
<td>97</td>
<td>83</td>
</tr>
<tr>
<td>Bar/Lounge Seats Per Store</td>
<td>36</td>
<td>28</td>
<td>49</td>
<td>36</td>
</tr>
<tr>
<td>Outdoor Seats Per Store</td>
<td>33</td>
<td>63</td>
<td>48</td>
<td>49</td>
</tr>
</tbody>
</table>

### Production Breweries (TTL 2009 Production)

<table>
<thead>
<tr>
<th>Category</th>
<th>1-1000 bbl</th>
<th>1001-7500 bbl</th>
<th>7501-50,000 bbl</th>
<th>&gt;50,000 bbl</th>
<th>All Production Breweries</th>
</tr>
</thead>
<tbody>
<tr>
<td>TTL Seats Per Store</td>
<td>55</td>
<td>125</td>
<td>192</td>
<td>279</td>
<td>176</td>
</tr>
<tr>
<td>Dining Area Seats Per Store</td>
<td>0</td>
<td>33</td>
<td>99</td>
<td>155</td>
<td>81</td>
</tr>
<tr>
<td>Bar/Lounge Seats Per Store</td>
<td>45</td>
<td>45</td>
<td>44</td>
<td>50</td>
<td>81</td>
</tr>
<tr>
<td>Outdoor Seats Per Store</td>
<td>10</td>
<td>27</td>
<td>48</td>
<td>45</td>
<td>81</td>
</tr>
</tbody>
</table>
72. AVERAGE PROPORTION OF DINING, BAR/LOUNGE, AND OUTDOOR SEATS

**Brewpub Companies (TTL 2009 Production)**

- Proportion of Dining Area Seats:
  - 1-500 bbl: 53%
  - 501-1000 bbl: 47%
  - >1000 bbl: 71%
  - All Brewpub Companies: 58%

- Proportion of Bar/Lounge Seats per Store (includes taproom only operations):
  - 1-500 bbl: 25%
  - 501-1000 bbl: 15%
  - >1000 bbl: 15%
  - All Brewpub Companies: 23%

- Proportion of Outdoor Seats:
  - 1-500 bbl: 17%
  - 501-1000 bbl: 14%
  - >1000 bbl: 22%
  - All Brewpub Companies: 22%

**Production Breweries (TTL 2009 Production)**

- Proportion of Dining Area Seats:
  - 1-1000 bbl: 0%
  - 1001-7500 bbl: 0%
  - 7501-50,000 bbl: 0%
  - >50,000 bbl: 0%
  - All Production Breweries: 0%

- Proportion of Bar/Lounge Seats per Store (includes taproom only operations):
  - 1-1000 bbl: 27%
  - 1001-7500 bbl: 27%
  - 7501-50,000 bbl: 27%
  - >50,000 bbl: 27%
  - All Production Breweries: 27%

- Proportion of Outdoor Seats:
  - 1-1000 bbl: 23%
  - 1001-7500 bbl: 25%
  - 7501-50,000 bbl: 26%
  - >50,000 bbl: 23%
  - All Production Breweries: 23%
### 73. AVERAGE LUNCH AND DINNER CHECK TTLS

#### Brewpub Companies (TTL 2009 Production)

- **Average Lunch Check TTL**
  - 1-500 bbl: $18.78
  - 501-1000 bbl: $14.86
  - >1000 bbl: $15.88
  - All Brewpub Companies: $16.17

- **Average Dinner Check TTL**
  - 1-500 bbl: $19.12
  - 501-1000 bbl: $22.43
  - >1000 bbl: $24.00
  - All Brewpub Companies: $21.35

#### Production Breweries (TTL 2009 Production)

- **Average Lunch Check TTL**
  - 1-1000 bbl: $18.54
  - 1001-7500 bbl: $16.07
  - 7501-50,000 bbl: $16.12
  - >50,000 bbl: $15.95
  - All Production Breweries: $15.50

- **Average Dinner Check TTL**
  - 1-1000 bbl: $22.68
  - 1001-7500 bbl: $21.26
  - 7501-50,000 bbl: $21.61
  - >50,000 bbl: $21.16
  - All Production Breweries: $21.16
Benchmarking and Best Practices survey results

### 74. AVERAGE MONTHLY REVENUE PER SEAT

#### Brewpub Companies (TTL 2009 Production)

- **Indoor Dining**
  - 1-500 bbl: $65.12
  - 501-1000 bbl: n/a
  - >1000 bbl: n/a
  - All Brewpub Companies: n/a

- **Indoor Bar/Lounge**
  - 1-500 bbl: $506.26
  - 501-1000 bbl: $29.59
  - >1000 bbl: n/a
  - All Brewpub Companies: $1,293.16

#### Production Breweries (TTL 2009 Production)

- **Indoor Dining**
  - 1-1000 bbl: $1,818.24
  - 1001-7500 bbl: $1,545.83
  - 7501-50,000 bbl: $1,827.36
  - >50,000 bbl: $1,228.27
  - All Production Breweries: $1,120.00

- **Indoor Bar/Lounge**
  - 1-1000 bbl: $1,827.36
  - 1001-7500 bbl: $1,818.24
  - 7501-50,000 bbl: $1,626.40
  - >50,000 bbl: $1,313.50
  - All Production Breweries: $1,400.00
75. AVERAGE FOOD & BEER COSTS

Brewpub Companies (TTL 2009 Production)

- Average Food Cost Across Entire Menu: 33.3%, 29.4%, 29.0%, 30.4%
- Average House Beer Pour Cost: 15.5%, 12.1%, 10.8%, 13.1%
- Average Guest Beer Pour Cost: 32.7%, 28.7%, 28.0%, 29.9%

Production Breweries (TTL 2009 Production)

- Average Food Cost Across Entire Menu: n/a, 39.8%, 29.5%, 28.6%, 30.5%
- Average House Beer Pour Cost: n/a, 16.7%, 18.1%, 13.7%, 19.2%, 16.9%
- Average Guest Beer Pour Cost: n/a, 25.0%, 20.0%, 30.8%, 32.2%
## 76. Average Outdoor Seats by Region and Availability

| Brewpub Companies (TTL 2009 Production) | All Regions - Avg Number of Outdoor Seats per Store | All Regions - Avg Number of Months Available | Midwest - Avg Number of Outdoor Seats per Store | Midwest - Avg Number of Months Available | Mountain West - Avg Number of Outdoor Seats per Store | Mountain West - Avg Number of Months Available | Northeast - Avg Number of Outdoor Seats per Store | Northeast - Avg Number of Months Available | Pacific - Avg Number of Outdoor Seats per Store | Pacific - Avg Number of Months Available | Pacific NW - Avg Number of Outdoor Seats per Store | Pacific NW - Avg Number of Months Available | South - Avg Number of Outdoor Seats per Store | South - Avg Number of Months Available |
|-----------------------------------------|-----------------------------------------------|-----------------------------------------------|-----------------------------------------------|-----------------------------------------------|-----------------------------------------------|-----------------------------------------------|-----------------------------------------------|-----------------------------------------------|-----------------------------------------------|-----------------------------------------------|-----------------------------------------------|-----------------------------------------------|-----------------------------------------------|
| 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                                           |

## 77. Average Proportion of Sales of Food, Beers and Other

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

<table>
<thead>
<tr>
<th>Production Breweries (TTL 2009 Production)</th>
<th>Food Sales %</th>
<th>House Beer %</th>
<th>Guest Beer %</th>
<th>All Other Bar Sales %</th>
</tr>
</thead>
<tbody>
<tr>
<td>1-1000 bbl</td>
<td>0.0%</td>
<td>100.0%</td>
<td>0.0%</td>
<td>0.0%</td>
</tr>
<tr>
<td>1001-7500 bbl</td>
<td>19.4%</td>
<td>77.2%</td>
<td>0.4%</td>
<td>3.0%</td>
</tr>
<tr>
<td>7501-50,000 bbl</td>
<td>50.0%</td>
<td>39.3%</td>
<td>3.5%</td>
<td>7.2%</td>
</tr>
<tr>
<td>&gt;50,000 bbl</td>
<td>59.0%</td>
<td>32.3%</td>
<td>2.1%</td>
<td>6.6%</td>
</tr>
<tr>
<td>All Production Breweries</td>
<td>38.6%</td>
<td>54.7%</td>
<td>1.8%</td>
<td>5.0%</td>
</tr>
</tbody>
</table>
Benchmarking and Best Practices survey results

### Brewpub Companies (TTL 2009 Production)

- **1-500 bbl**: 64.3%
- **501-1000 bbl**: 70.6%
- **>1000 bbl**: 66.7%
- **All Brewpub Companies**: 67.5%

### Production Breweries (TTL 2009 Production)

- **1-1000 bbl**: 25.0%
- **1001-7500 bbl**: 28.6%
- **7501-50,000 bbl**: 25.9%
- **>50,000 bbl**: 0%
- **All Production Breweries**: 0%
### 79. Number of Taps in Company Owned Pubs, Restaurants and Tap Rooms

#### Brewpub Companies (TTL 2009 Production)

<table>
<thead>
<tr>
<th></th>
<th>1-500 bbl</th>
<th>501-1000 bbl</th>
<th>&gt;1000 bbl</th>
<th>All Brewpub Companies</th>
</tr>
</thead>
<tbody>
<tr>
<td>Average TTL Taps</td>
<td>13</td>
<td>16</td>
<td>42</td>
<td>20</td>
</tr>
<tr>
<td>Average Taps per Store</td>
<td>13</td>
<td>16</td>
<td>14</td>
<td>14</td>
</tr>
</tbody>
</table>

#### Production Breweries (TTL 2009 Production)

<table>
<thead>
<tr>
<th></th>
<th>1-1000 bbl</th>
<th>1001-7500 bbl</th>
<th>7501-50,000 bbl</th>
<th>&gt;50,000 bbl</th>
<th>All Production Breweries</th>
</tr>
</thead>
<tbody>
<tr>
<td>Average TTL Taps</td>
<td>9</td>
<td>12</td>
<td>24</td>
<td>68</td>
<td>30</td>
</tr>
<tr>
<td>Average Taps per Store</td>
<td>9</td>
<td>12</td>
<td>17</td>
<td>26</td>
<td>17</td>
</tr>
</tbody>
</table>

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A Division of the Brewers Association
www.BrewersAssociation.org