



# 2020 Economic and Fiscal Impact of Ohio's Craft Brewing Industry

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**SILVERLODE**  
CONSULTING  
A GBX Group Company

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## Introduction

The Ohio Craft Brewers Association (OCBA) serves as the unified voice and advocate for craft breweries across the state of Ohio. Silverlode Consulting was engaged by OCBA to estimate the economic and fiscal impacts of Ohio’s craft breweries on the state, as well as on each of its seven geographic regions, during calendar year 2020.

IMPLAN, one of the most widely used and accepted methodologies for estimating regional economic impacts, was used to complete the analyses. 2019 IMPLAN data, the most current data available at the time, was used for this study.

To gather the job, payroll, sales and other operational information necessary to develop the economic impact estimates, OCBA administered an online survey to the 265 craft breweries who are members of the organization. Approximately 170 brewers responded to the survey.

In 2020, despite the COVID-19 pandemic, Ohio’s craft brewing industry generated an estimated \$880.7 million of economic activity in the state. The following table summarizes the impact of the Ohio craft brewing industry operations in 2020 on the State of Ohio.

### Total Impacts in the State of Ohio



**\$880.7 million**  
economic output



**\$99.8 million**  
state and local  
taxes



**\$59.0 million**  
federal taxes



**8,295**  
jobs



**\$253.1 million**  
labor income



**5,577**  
households  
supported

While the industry’s monetary impact is significant, the craft breweries’ impact extends far beyond quantitative economic measures. Some of the many ways the industry contributes to economic and community development are highlighted in the *Other Impacts* section of this report.

## Ohio's Craft Brewing Industry

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At the end of 2020, there were 357<sup>1</sup> Ohio craft breweries in operation, including 47 which opened in 2020. An additional 73 breweries are currently in planning across the state. The Brewers Association (BA), the national craft brewing trade association, estimates there were only 45 craft breweries operating in Ohio in 2011. Accordingly, more than 87% of the Ohio craft breweries currently operating have opened within the last 10 years.

The number of Ohio craft breweries has jumped 19% in just the last two years (from 300 in 2018), despite the COVID-19 pandemic. Further, according to the 2020 OCBA member survey, 72% of respondents stated their brewery plans to increase production within the next two years and more than half of respondents plan to expand their facilities over the same period.

While the number of Ohio craft breweries has increased exponentially over the past several years, the COVID-19 pandemic played a large role limiting industry growth, job creation and production. Ohio craft brewing jobs marginally increased by an estimated 3% between 2018 and 2020, while estimated barrel production decreased 17% over the two-year period. Still, Ohio maintains a tremendously strong place in the national craft brewing industry. The BA's Annual Production Report ranked Ohio fifth among U.S. states in craft beer production volume in 2020 and sixth in economic impact among all states in 2019. Nationally, the BA estimates<sup>2</sup> U.S. craft beer sales volume declined 9% and direct jobs declined 14% in 2020.

The pandemic presented numerous challenges for Ohio craft breweries including a state-mandated shut down of taprooms, bars and restaurants for almost two months in early 2020, the restriction of alcohol sales after 10 p.m., stay-at-home advisories and safety concerns related to indoor gatherings. To remain open during the pandemic, craft breweries incurred additional expenses including constructing physical barriers, packaging beer for take-out and distribution, installing advanced air filtration systems and limiting seating capacity. There were also indirect economic challenges caused by the pandemic including an aluminum can supply shortage and a reduction in workforce availability.

Despite temporary shutdowns, the majority of Ohio craft breweries were able to stay in business in 2020, with only 15 permanently closing during the year. Craft breweries pivoted to pick up and delivery options, direct shipping, increased outdoor seating and newly-devised safety protocols for customers and employees. At the time of the 2020 membership survey in February 2021, more than 80% of responding breweries had

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<sup>1</sup> This total includes breweries with multiple locations counted individually.

<sup>2</sup> Brewers Association. (2020). *2020 Small & Independent U.S. Craft Brewer Annual Production Report*.

reopened their taprooms.

While most of Ohio's craft brewery taprooms have reopened, they have done so at reduced customer capacity. Of the brewers who responded to a question about current operating capacity, less than 6% were operating at full capacity. The survey indicated that roughly 12% of breweries are operating at 76% to 99% capacity, almost 50% are operating at 51% to 75%, almost 28% are operating at 26% to 50% capacity, and less than 6% are operating at less than 25% capacity.

## About this Report

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### Data and Analysis

IMPLAN, one of the most widely used and accepted methodologies for estimating regional economic impacts, was used to complete the analyses. 2019 IMPLAN data, the most current data available at the time, was used for this study.

To gather the job, payroll, sales and other operational information necessary to develop the economic impact estimates, OCBA administered an online survey to approximately 265 member craft breweries. Approximately 170 brewers responded to the survey.

With the assistance of OCBA's executive director, Mary MacDonald and deputy director, Justin Hemminger, as well as Brewers Association chief economist, Bart Watson, the survey data was extrapolated to estimate the size of the state's craft brewing industry and each of the regions.

The Brewers Association prepares periodic state-by-state economic impact estimates for the industry, and its most recent estimates were published in 2019. It is important to note while BA estimates the impact of the craft brewing industry on the state of Ohio, there are key differences between this study and the BA study.

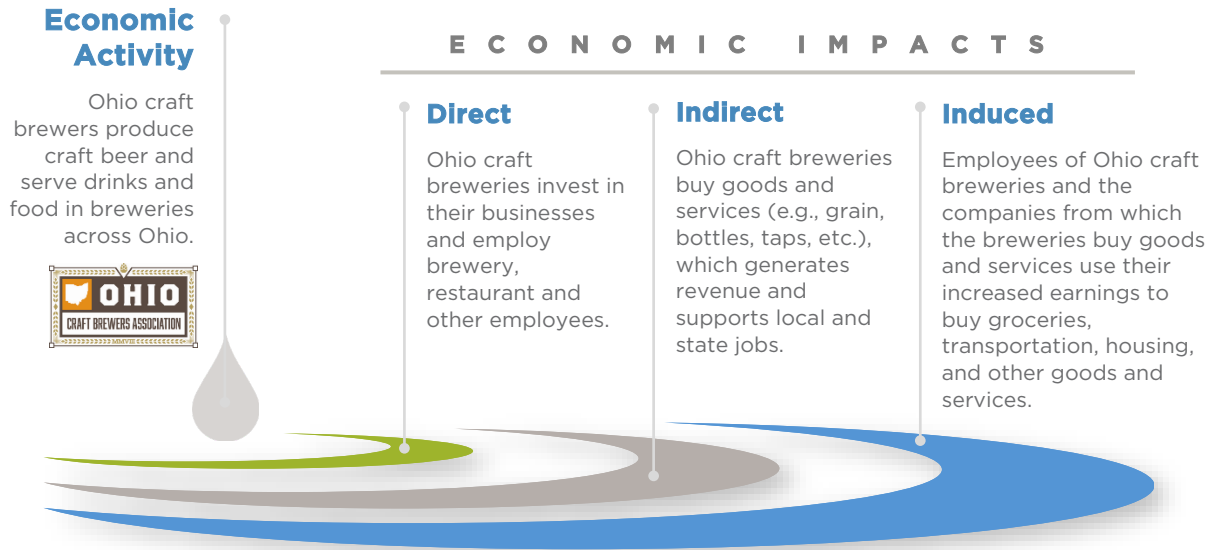
The BA study measures the impact of the entire country's craft brewing industry on the state of Ohio, while this study considers the impact of the craft brewers located in Ohio on the economy of the state. As a result, among other things, BA's estimates include the impact of purchases from Ohio goods and services suppliers by craft brewers located outside the state as well as retail/distribution activity in Ohio by out-of-state brewers, while this study does not include those impacts.

## Understanding Economic Impacts

Economic and fiscal impacts can be divided into three component parts, which are referred to as Direct, Indirect, and Induced as described below.

- **Direct** — Activity attributable to Ohio craft brewer operations (employees, associated payroll, construction investments, etc.) as reported by the brewers.
- **Indirect** — The economic activity of the entities that provide goods and services to the Ohio craft brewers, such as suppliers and service providers (farmers, bottle manufacturers, etc.).
- **Induced** — Economic activity arising from employee (both Direct and Indirect) household spending.

Another way of looking at economic impacts is to think of a commercial activity, such as the production of craft beer, as creating “ripples” of economic activity throughout the region being analyzed. The graphic below depicts this ripple activity.



Additional information about data sources, methodology and terms used in this study appears in the *Study Methodology* section near the end of the report.

## Areas of Analysis

This report includes the following areas of impact analysis:



### State of Ohio

The impacts of Ohio craft breweries on the economy of the state of Ohio.

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### Northwest Region

The impacts of craft breweries located in Allen, Auglaize, Crawford, Defiance, Erie, Fulton, Hancock, Hardin, Henry, Huron, Lucas, Mercer, Ottawa, Paulding, Putnam, Sandusky, Seneca, Van Wert, Williams, Wood and Wyandot counties on the economy of the state of Ohio.

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### Greater Cleveland Region

The impacts of craft breweries located in Ashtabula, Cuyahoga, Geauga, Lake and Lorain counties on the economy of the state of Ohio.

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### Northeast Region

The impacts of craft breweries located in Ashland, Carroll, Columbiana, Holmes, Knox, Mahoning, Medina, Portage, Richland, Stark, Summit, Trumbull, Tuscarawas and Wayne counties on the economy of the state of Ohio.

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### Central Region

The impacts of craft breweries located in Delaware, Franklin, Marion and Morrow counties on the economy of the state of Ohio.

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### West Central Region

The impacts of craft breweries located in Champaign, Clark, Darke, Fayette, Greene, Logan, Madison, Miami, Montgomery, Preble, Shelby and Union counties on the economy of the state of Ohio.

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### Southwest Region

The impacts of craft breweries located in Adams, Brown, Butler, Clermont, Clinton, Hamilton, Highland and Warren counties on the economy of the state of Ohio.

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### Southeast Region

The impacts of craft breweries located in Athens, Belmont, Coshocton, Fairfield, Gallia, Guernsey, Harrison, Hocking, Jackson, Jefferson, Lawrence, Licking, Meigs, Monroe, Morgan, Muskingum, Noble, Perry, Pickaway, Pike, Ross, Scioto, Vinton and Washington counties on the economy of the state of Ohio.

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## State of Ohio Impacts

### 2020 Overview

- 357 craft breweries
- 6,247 direct jobs
- Approximately 1.2 million barrels of beer produced
- 73 breweries in planning
- Approximately \$1.7 million and 8,000 volunteer hours contributed by 169 OCBA survey respondents

In 2020, craft breweries in the State of Ohio directly and indirectly supported \$880.7 million of economic activity in Ohio through their ongoing operations.

The state's craft breweries directly employed an estimated 6,247 individuals. These direct jobs sustained an additional 2,048 indirect and induced jobs, resulting in a total of 8,295 Ohio jobs.

An estimated \$253.1 million of annual labor income, including benefits, was associated with the total jobs. These jobs and associated earnings sustained 5,577 Ohio households.

The activities of the Ohio craft breweries resulted in the generation of an estimated \$99.8 million of state and local taxes and \$59.0 million of federal taxes during 2020.

### State of Ohio Estimated Impacts



**\$880.7 million**  
economic output



**8,295**  
jobs



**\$253.1 million**  
labor income



**5,577**  
households supported



**\$99.8 million**  
state and local taxes



**\$59.0 million**  
federal taxes

Total Impacts	Direct	Indirect & Induced	Total
Economic Output	\$ 494,998,000	\$ 385,663,000	\$ 880,661,000
Jobs	6,247	2,048	8,295
Labor Income	\$ 143,531,000	\$ 109,540,000	\$ 253,071,000
Households Supported	4,200	1,377	5,577

## Northwest Region Impacts

### 2020 Regional Overview

- 46 craft breweries
- 628 direct jobs
- Approximately 19,000 barrels of beer produced
- 8 breweries in planning
- Approximately \$66,000 and 600 volunteer hours contributed by 21 OCBA survey respondents

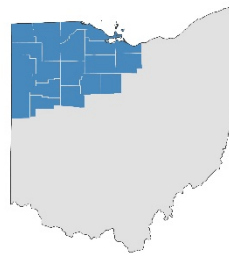
In 2020, craft breweries in the Northwest region directly and indirectly supported \$47.5 million of economic activity in Ohio through their ongoing operations.

The region's craft breweries directly employed an estimated 628 individuals. These direct jobs sustained an additional 123 indirect and induced jobs, resulting in a total of 751 Ohio jobs.

An estimated \$17.0 million of annual labor income, including benefits, was associated with the total jobs. These jobs and associated earnings sustained 505 Ohio households.

The activities of the Northwest region craft breweries resulted in the generation of an estimated \$5.3 million of state and local taxes and \$3.8 million of federal taxes during 2020.

### Northwest Region Estimated Impacts



**\$47.5 million**  
economic output



**751**  
jobs



**\$17.0 million**  
labor income



**505**  
households supported



**\$5.3 million**  
state and local taxes



**\$3.8 million**  
federal taxes

Total Impacts	Direct	Indirect & Induced	Total
Economic Output	\$ 24,998,000	\$ 22,518,000	\$ 47,516,000
Jobs	628	123	751
Labor Income	\$ 10,498,000	\$ 6,499,000	\$ 16,997,000
Households Supported	422	83	505

# Greater Cleveland Region Impacts

## 2020 Regional Overview

- 52 craft breweries
- 1,268 direct jobs
- Approximately 187,000 barrels of beer produced
- 17 breweries in planning
- Approximately \$485,000 and 1,000 volunteer hours contributed by 21 OCBA survey respondents

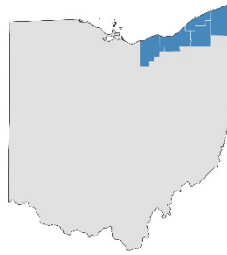
In 2020, craft breweries in the Greater Cleveland region directly and indirectly supported \$166.7 million of economic activity in Ohio through their ongoing operations.

The region's craft breweries directly employed an estimated 1,268 individuals. These direct jobs sustained an additional 404 indirect and induced jobs, resulting in a total of 1,672 Ohio jobs.

An estimated \$52.1 million of annual labor income, including benefits, was associated with the total jobs. These jobs and associated earnings sustained 1,124 Ohio households.

The activities of the Greater Cleveland region craft breweries resulted in the generation of an estimated \$18.6 million of state and local taxes and \$11.9 million of federal taxes during 2020.

## Greater Cleveland Region Estimated Impacts



**\$166.7 million**  
economic output



**1,672**  
jobs



**\$52.1 million**  
labor income



**1,124**  
households supported



**\$18.6 million**  
state and local taxes



**\$11.9 million**  
federal taxes

Total Impacts	Direct	Indirect & Induced	Total
Economic Output	\$ 91,523,000	\$ 75,179,000	\$ 166,702,000
Jobs	1,268	404	1,672
Labor Income	\$ 30,604,000	\$ 21,515,000	\$ 52,119,000
Households Supported	853	271	1,124

## Northeast Region Impacts

### 2020 Regional Overview

- 71 craft breweries
- 970 direct jobs
- Approximately 35,000 barrels of beer produced
- 14 breweries in planning
- Approximately \$253,000 and 2,900 volunteer hours contributed by 30 OCBA survey respondents

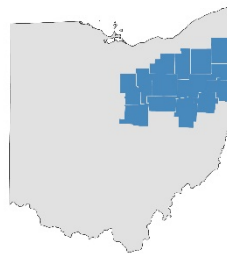
In 2020, craft breweries in the Northeast region directly and indirectly supported \$90.1 million of economic activity in Ohio through their ongoing operations.

The region's craft breweries directly employed an estimated 970 individuals. These direct jobs sustained an additional 224 indirect and induced jobs, resulting in a total of 1,194 Ohio jobs.

An estimated \$29.8 million of annual labor income, including benefits, was associated with the total jobs. These jobs and associated earnings sustained 803 Ohio households.

The activities of the Northeast region craft breweries resulted in the generation of an estimated \$10.0 million of state and local taxes and \$6.7 million of federal taxes during 2020.

### Northeast Region Estimated Impacts



**\$90.1 million**  
economic output



**1,194**  
jobs



**\$29.8 million**  
labor income



**803**  
households supported



**\$10.0 million**  
state and local taxes



**\$6.7 million**  
federal taxes

Total Impacts	Direct	Indirect & Induced	Total
Economic Output	\$ 48,588,000	\$ 41,466,000	\$ 90,054,000
Jobs	970	224	1,194
Labor Income	\$ 17,923,000	\$ 11,911,000	\$ 29,834,000
Households Supported	652	151	803

## Central Region Impacts

### 2020 Regional Overview

- 57 craft breweries
- 964 direct jobs
- Approximately 134,000 barrels of beer produced
- 12 breweries in planning
- Approximately \$293,000 and 1,500 volunteer hours contributed by 33 OCBA survey respondents

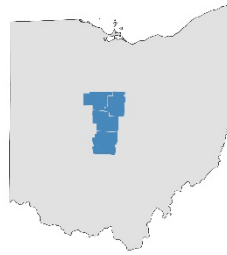
In 2020, craft breweries in the Central region directly and indirectly supported \$100.6 million of economic activity in Ohio through their ongoing operations.

The region's craft breweries directly employed an estimated 964 individuals. These direct jobs sustained an additional 281 indirect and induced jobs, resulting in a total of 1,245 Ohio jobs.

An estimated \$41.6 million of annual labor income, including benefits, was associated with the total jobs. These jobs and associated earnings sustained 837 Ohio households.

The activities of the Central region craft breweries resulted in the generation of an estimated \$11.0 million of state and local taxes and \$9.0 million of federal taxes during 2020.

### Central Region Estimated Impacts



**\$100.6 million**  
economic output



**1,245**  
jobs



**\$41.6 million**  
labor income



**837**  
households supported



**\$11.0 million**  
state and local taxes



**\$9.0 million**  
federal taxes

Total Impacts	Direct	Indirect & Induced	Total
Economic Output	\$ 50,056,000	\$ 50,519,000	\$ 100,575,000
Jobs	964	281	1,245
Labor Income	\$ 26,855,000	\$ 14,719,000	\$ 41,574,000
Households Supported	648	189	837

## West Central Region Impacts

### 2020 Regional Overview

- 33 craft breweries
- 435 direct jobs
- Approximately 19,000 barrels of beer produced
- 6 breweries in planning
- Approximately \$77,000 and 350 volunteer hours contributed by 22 OCBA survey respondents

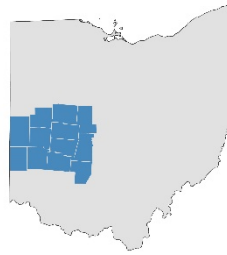
In 2020, craft breweries in the West Central region directly and indirectly supported \$33.8 million of economic activity in Ohio through their ongoing operations.

The region's craft breweries directly employed an estimated 435 individuals. These direct jobs sustained an additional 87 indirect and induced jobs, resulting in a total of 522 Ohio jobs.

An estimated \$12.1 million of annual labor income, including benefits, was associated with the total jobs. These jobs and associated earnings sustained 351 Ohio households.

The activities of the West Central region craft breweries resulted in the generation of an estimated \$3.7 million of state and local taxes and \$2.7 million of federal taxes during 2020.

### West Central Region Estimated Impacts



**\$33.8 million**  
economic output



**522**  
jobs



**\$12.1 million**  
labor income



**351**  
households supported



**\$3.7 million**  
state and local taxes



**\$2.7 million**  
federal taxes

Total Impacts	Direct	Indirect & Induced	Total
Economic Output	\$ 17,775,000	\$ 15,999,000	\$ 33,774,000
Jobs	435	87	522
Labor Income	\$ 7,454,000	\$ 4,618,000	\$ 12,072,000
Households Supported	293	58	351

## Southwest Region Impacts

### 2020 Regional Overview

- 66 craft breweries
- 1,577 direct jobs
- Approximately 740,000 barrels of beer produced
- 10 breweries in planning
- Approximately \$536,000 and 1,400 volunteer hours contributed by 30 OCBA survey respondents

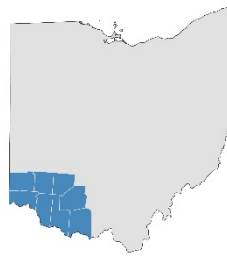
In 2020, craft breweries in the Southwest region directly and indirectly supported \$396.9 million of economic activity in Ohio through their ongoing operations.

The region's craft breweries directly employed an estimated 1,577 individuals. These direct jobs sustained an additional 816 indirect and induced jobs, resulting in a total of 2,393 Ohio jobs.

An estimated \$85.4 million of annual labor income, including benefits, was associated with the total jobs. These jobs and associated earnings sustained 1,609 Ohio households.

The activities of the Southwest region craft breweries resulted in the generation of an estimated \$46.1 million of state and local taxes and \$21.4 million of federal taxes during 2020.

### Southwest Region Estimated Impacts



**\$396.9 million**  
economic output



**2,393**  
jobs



**\$85.4 million**  
labor income



**1,609**  
households supported



**\$46.1 million**  
state and local taxes



**\$21.4 million**  
federal taxes

Total Impacts	Direct	Indirect & Induced	Total
Economic Output	\$ 237,775,000	\$ 159,157,000	\$ 396,932,000
Jobs	1,577	816	2,393
Labor Income	\$ 41,136,000	\$ 44,293,000	\$ 85,429,000
Households Supported	1,060	549	1,609

## Southeast Region Impacts

### 2020 Regional Overview

- 32 craft breweries
- 405 direct jobs
- Approximately 22,000 barrels of beer produced
- 6 breweries in planning
- Approximately \$31,000 and 210 volunteer hours contributed by 12 OCBA survey respondents

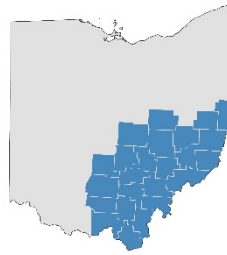
In 2020, craft breweries in the Southeast region directly and indirectly supported \$45.1 million of economic activity in Ohio through their ongoing operations.

The region's craft breweries directly employed an estimated 405 individuals. These direct jobs sustained an additional 113 indirect and induced jobs, resulting in a total of 518 Ohio jobs.

An estimated \$15.0 million of annual labor income, including benefits, was associated with the total jobs. These jobs and associated earnings sustained 348 Ohio households.

The activities of the Southeast region craft breweries resulted in the generation of an estimated \$5.0 million of state and local taxes and \$3.4 million of federal taxes during 2020.

### Southeast Region Estimated Impacts



**\$45.1 million**  
economic output



**518**  
jobs



**\$15.0 million**  
labor income



**348**  
households supported



**\$5.0 million**  
state and local taxes



**\$3.4 million**  
federal taxes

Total Impacts	Direct	Indirect & Induced	Total
Economic Output	\$ 24,283,000	\$ 20,825,000	\$ 45,108,000
Jobs	405	113	518
Labor Income	\$ 9,061,000	\$ 5,985,000	\$ 15,046,000
Households Supported	272	76	348



## Other Impacts

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Ohio's craft brewing industry positively shapes Ohio's economy and communities in ways which extend far beyond quantitative economic measures. Some of these contributions, as reported by brewers in the OCBA member surveys, are highlighted here.

### Construction Impacts

Survey respondents, which represent only a portion of the craft brewers in the state, reported investing more than \$25 million in construction projects and close to \$17 million in equipment in 2020. Further, more than 70% of survey respondents stated that their brewery plans to increase production within the next two years and over half of respondents reported that their brewery is planning a facility expansion over the same time frame.

### Economic and Community Development

Much of the economic impact of the craft brewing industry occurs within the neighborhood where the brewery is located, and craft breweries often catalyze development in the areas that surround them. Many of Ohio's craft breweries have creatively renovated vacant commercial, public and even religious buildings, converting them into engines for neighborhood development and accessible job creation.

### Community Impact

Beyond offering hip places for people to eat and drink, Ohio breweries also serve as community gathering places, with survey respondents reporting hosting community nights, concerts, workshops, fundraisers and countless other place-making activities. These activities contribute immeasurably to the fabric of the communities in which the breweries operate.

In addition to regularly producing special and collaborative beers to raise money for charities, Ohio craft breweries give back to their communities through a wide range of efforts including sponsoring and mentoring youth, cleaning up rivers, and collecting coats and toys. Breweries truly stepped up to help their neighborhoods during the COVID-19 pandemic by operating food banks, raising money for hospital expenses and COVID-19 related burials, donating howlers to frontline workers and many more initiatives.

The brewers that responded to the survey made more than \$1.7 million in charitable contributions and donated an estimated 8,000 volunteer hours in 2020.

## Study Methodology

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### About IMPLAN

Portions of this analysis were completed using the IMPLAN (IMpact Analysis for PLANning) economic impact modeling system. IMPLAN is an input-output model that was originally developed by the U.S. Forest Service in the 1970s and is one of the most respected and widely used approaches to regional economic impact analysis. IMPLAN is used by more than 1,000 universities, government agencies and consultants to estimate the economic and fiscal impacts of investments and/or changes in one or more industries. Data underlying the IMPLAN model is partially derived from industry surveys conducted periodically by the U.S. Bureau of Economic Analysis (BEA), as well as other sources.

### Terminology

A **Direct** effect describes an initial, or first-round change in the economy, and is the starting point for economic impact analysis. Changes in an economy create “ripples” of economic activity throughout the region being analyzed. These ripples are described as Indirect and Induced effects. A positive Direct effect causes increased purchases within the economy being modeled, as well as “leakage” of economic activity out of the economy being studied in the form of imports into the economy from other areas outside the economy. Generally speaking, Direct describes activity attributable to the economic activity being modeled. In this report, Direct jobs comprise full, part-time, and temporary employees and jobs supported by Ohio’s craft breweries.

**Indirect** effects represent changes in the industries that provide goods and services to the economic activity being modeled (e.g., suppliers, service providers, etc.). Indirect effects occur in a repeating cycle but diminish in each round as economic activity “leaks” from the region being modeled. Indirect effects cease when the last dollar of economic activity leaks from the economy being studied. Indirect effects are estimated using IMPLAN.

**Induced** effects represent the impact of changes in household spending resulting from the Direct and Indirect effects. Like Indirect effects, Induced effects occur in repeating cycles, but diminish in each round as economic activity “leaks” from the region being modeled. Induced effects cease when the last dollar of economic activity leaks from the economy being studied. Induced effects are estimated using IMPLAN. For ease of presentation, in this report, Induced effects are combined with Indirect effects and referred to simply as Indirect.

**Total Impact** refers to the final cumulative result of all rounds of Direct, Indirect and Induced economic activity.

## Report Definitions

The table below provides a reference of definitions for the items included in the summary tables and infographics of this report.

	Direct	Indirect and Induced
Economic Output	The total value of goods and services produced by the activity being modeled. Output is roughly equivalent to sales or revenue associated with the Direct activity.	IMPLAN estimate of the total value of goods and services produced by Indirect and Induced economic activity. Output is roughly equivalent to sales or revenue associated with this activity.
Jobs	Jobs directly engaged in the activity being analyzed.	IMPLAN estimate of the number of jobs supported by the purchase of goods and services by the activity being modeled (Indirect) as well as by changes in household spending (Induced).
Labor Income	Wages and benefits associated with Direct jobs.	IMPLAN estimate of the wages, benefits, and proprietor income associated with the Indirect and Induced economic activity.
Households Supported	IMPLAN estimate of the number of households supported by the economic activity being analyzed.	IMPLAN estimate of the number of households supported by Indirect and induced economic activity.
State and Local Taxes	IMPLAN estimate of all taxes paid to state and local units of government as a direct result of the economic activity being analyzed.	IMPLAN estimate of all taxes paid to state and local units of government due to Indirect and Induced economic activity.
Federal Taxes	IMPLAN estimate of all taxes paid to the federal government as a direct result of the economic activity being analyzed.	IMPLAN estimate of all taxes paid to the federal government due to Indirect and Induced economic activity.

## About the OCBA

The Ohio Craft Brewers Association was founded in 2008 and serves to unify the growing Ohio brewing community, market Ohio manufactured beers throughout the State and beyond, and monitor and promote a strong beer industry in Ohio. The OCBA provides membership opportunities for Ohio brewers, industry partners and craft beer enthusiasts and seeks to create a more inclusive craft brewing community. For Ohio breweries, the OCBA offers advertising and marketing opportunities, technical and educational conferences and seminars, community-building connections between breweries and businesses that support the industry, numerous member events, insurance discounts, advocacy and other benefits.

## Member and Industry Participants

The participation of the OCBA members who responded to the survey, along with the support of all OCBA members, is sincerely appreciated. Additionally, Dr. Bart Watson of the Brewers Association provided valuable industry data which was critical to the development of this report.

## About Silverlode Consulting

Silverlode Consulting was founded in 2002 by two leaders of EY's and PwC's consulting practices. As a national leader in the field of economic impact analysis, we have helped hundreds of organizations, ranging from non-profit arts groups to multi-national corporations, to measure their impacts on their communities and communicate those impacts to their stakeholders. By meticulously estimating and effectively communicating the direct, indirect and induced jobs, earnings, taxes and other impacts of projects, the presence of an organization, or an investment in a community, our work has helped clients to gain approvals, secure funding, and positively shift public opinion. More information about our firm and our work in economic impact analysis can be found on our website [www.silverlodeconsulting.com](http://www.silverlodeconsulting.com).