



2018 ECONOMIC AND FISCAL IMPACT OF OHIO'S CRAFT BEER INDUSTRY

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INTRODUCTION

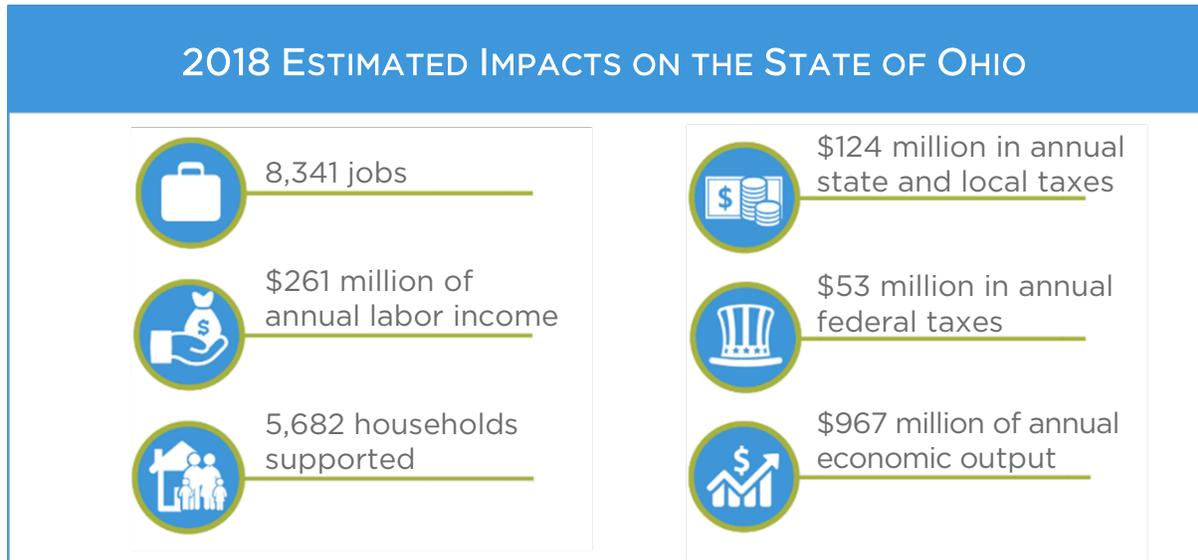
The Ohio Craft Brewers Association (OCBA) serves as the unified voice and advocate for craft brewers across the state of Ohio. The OCBA commissioned Silverlode Consulting to estimate the economic impact of the craft brewing industry on the economy of the State of Ohio during 2018. The collective economic impact of the craft brewers located in each of seven regions of the State were also estimated.

Ohio's craft beer industry continues to experience significant growth. An economic impact study of the industry in 2015 that was completed by The Ohio State University found that there were 135 craft brewers in the State producing an estimated 1.2 million barrels of beer annually. Today, there are approximately 300 craft brewers producing an estimated 1.4 million barrels annually.

Approximately 50 new Ohio craft brewers opened in 2018, which represents a nearly 17% increase in brewers in just one year. An additional 65 breweries are currently in planning. Further, according to a recent survey of OCBA's members, which was completed by approximately 140 brewers, more than 100 (over two-thirds of the survey respondents) stated that their brewery plans to expand production within the next two years and over 80 (over half of respondents) plan facility expansions within the next two years.

In 2018, according to the national Brewers Association (BA), Ohio's craft brewing industry ranked seventh in economic impact and fourth in annual production among the US states. According to the BA, there were only 45 craft breweries operating in Ohio in 2011. The growth from 45 to 300 craft brewers over seven years represents a 567% growth in operating breweries.

With this growth, the industry’s impact on the State’s economy has increased significantly as well. In 2018, Ohio’s craft beer industry generated nearly one billion dollars of economic impact in the State. The industry’s tremendous economic impact is detailed in the table below and in the sections that follow.



While the industry’s monetary impact is significant, the craft brewers’ impact extends far beyond quantitative economic measures and some of the many ways the industry contributes to economic and community development are highlighted in this report.

ABOUT THIS REPORT

DATA AND ANALYSIS

IMPLAN, one of the most well-respected and widely-used methodologies for assessing regional economic impacts, was used to estimate the annual impact of the craft brewing industry. 2017 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, the Ohio Craft Brewers Association administered an online survey to approximately 235 craft brewers who are members of OCBA. Approximately 140 brewers responded to the survey.

With the assistance of OCBA's Executive Director, Mary MacDonald and Deputy Director, Justin Hemminger, as well as the Chief Economist for the national Brewers Association, Bart Watson, the survey data was extrapolated to estimate the size of the State's craft brewing industry and each of the regions.

The national Brewer's Association prepares periodic state-by-state economic impact estimates for the industry and its most recent estimates were published in 2018. It is important to note that while BA estimates the impact of the craft brewing industry on the State of Ohio, the scope of the BA study and this study are quite different.

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 impact 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. This study is much more similar in scope to the impact estimates prepared for OCBA by the Ohio State University for 2015.

UNDERSTANDING ECONOMIC IMPACTS

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

- **Direct** - Activity attributable to Ohio craft brewers (employees, their associated payroll, 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.
- **Induced** - Activity arising from employee (both Direct and Indirect) spending.

For streamlined presentation in this report, Indirect and Induced effects are combined and referred to simply as Indirect.

Additional information about the data sources, methodology, and definitions of terms used in this study can be found in the Study Methodology section near the end of the report.

AREAS OF ANALYSIS

This report includes the following areas of analysis:

- **State of Ohio Impacts** — The impacts of Ohio craft brewers on the State of Ohio.
- **Northwest Region Impacts** — The impacts of craft brewers 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 State of Ohio.
- **Greater Cleveland Region Impacts** — The impacts of craft brewers located in Ashtabula, Cuyahoga, Geauga, Lake, and Lorain counties on the State of Ohio.
- **Northeast Region Impacts** — The impacts of craft brewers located in Ashland, Carroll, Columbiana, Holmes, Knox, Mahoning, Medina, Portage, Richland, Stark, Summit, Trumbull, Tuscarawas, and Wayne counties on the State of Ohio.
- **Central Region Impacts** — The impacts of craft brewers located in Delaware, Franklin, Marion, and Morrow counties on the State of Ohio.
- **West Central Region Impacts** — The impacts of craft brewers located in Champaign, Clark, Darke, Fayette, Greene, Logan, Madison, Miami, Montgomery, Preble, Shelby, and Union counties on the State of Ohio.
- **Southwest Region Impacts** — The impacts of craft brewers located in Adams, Brown, Butler, Clermont, Clinton, Hamilton, Highland, and Warren counties on the State of Ohio.
- **Southeast Region Impacts** — The impacts of craft brewers 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 State of Ohio.



STATE OF OHIO IMPACTS

2018 STATE OVERVIEW

- 300 craft brewers
- Approximately 1.4 million barrels produced
- More than \$1.15 million and 13,000 volunteer hours contributed by OCBA survey respondents

In 2018, the craft brewers in the State of Ohio directly and indirectly generated an estimated \$967 million of economic output in the State through their ongoing operations. Ohio's craft brewers supported an estimated 8,341 jobs in the State of Ohio which had approximately \$261 million of associated labor income, including benefits. These jobs and earnings sustained an estimated 5,682 households in the State of Ohio.

The activities of Ohio craft brewers generated an estimated \$124 million of state and local taxes and \$53 million of federal taxes during 2018.

2018 ESTIMATED IMPACTS ON THE STATE OF OHIO



8,341 jobs



\$261 million of annual labor income



5,682 households supported



\$124 million in annual state and local taxes



\$53 million in annual federal taxes



\$967 million of annual economic output

2018 STATE OF OHIO IMPACTS DETAIL

	Direct	Indirect	Total
Jobs	6,085	2,256	8,341
Annual Earnings	\$ 136,690,000	\$ 124,757,000	\$ 261,447,000
Households Supported	4,144	1,538	5,682
Annual Economic Output	\$ 562,279,000	\$ 404,827,000	\$ 967,106,000

NORTHWEST REGION IMPACTS

2018 REGIONAL OVERVIEW

- 32 craft brewers
- Approximately 13,000 barrels produced
- More than \$40,000 and 245 volunteer hours contributed by OCBA survey respondents

In 2018, the craft brewers in the Northwest Region of Ohio directly and indirectly generated an estimated \$30 million of economic output in the State of Ohio through their ongoing operations. The Region's craft brewers supported an estimated 502 jobs in the State of Ohio which had approximately \$11 million of associated labor income, including benefits. These jobs and earnings sustained an estimated 342 households in the State of Ohio.

The activities of the Northwest Ohio craft brewers generated an estimated \$3.7 million of state and local taxes and \$1.7 million of federal taxes during 2018.

2018 NORTHWEST REGION ESTIMATED IMPACTS ON THE STATE OF OHIO



502 jobs



\$11 million of annual labor income



342 households supported



\$3.7 million in annual state and local taxes



\$1.7 million in annual federal taxes



\$30 million of annual economic output

2018 NORTHWEST REGION IMPACTS DETAIL

	Direct	Indirect	Total
Jobs	420	82	502
Annual Earnings	\$ 6,428,000	\$ 4,360,000	\$ 10,788,000
Households Supported	286	56	342
Annual Economic Output	\$ 16,408,000	\$ 14,006,000	\$ 30,414,000

GREATER CLEVELAND REGION IMPACTS

2018 REGIONAL OVERVIEW

- 53 craft brewers
- Approximately 240,000 barrels produced
- More than \$175,000 and 975 volunteer hours contributed by OCBA survey respondents

In 2018, the craft brewers in the Greater Cleveland Region of Ohio directly and indirectly generated an estimated \$190 million of economic output in the State of Ohio through their ongoing operations. The Region's craft brewers supported an estimated 1,942 jobs in the State of Ohio which had approximately \$60 million of associated labor income, including benefits. These jobs and earnings sustained an estimated 1,323 households in the State of Ohio.

The activities of the Greater Cleveland Ohio craft brewers generated an estimated \$24 million of state and local taxes and \$11 million of federal taxes during 2018.

2018 GREATER CLEVELAND REGION ESTIMATED IMPACTS ON THE STATE OF



1,942 jobs



\$60 million of annual labor income



1,323 households supported



\$24 million in annual state and local taxes



\$11 million in annual federal taxes



\$190 million of annual economic

2018 GREATER CLEVELAND REGION IMPACTS DETAIL

	Direct	Indirect	Total
Jobs	1,460	482	1,942
Annual Earnings	\$ 34,216,000	\$ 26,091,000	\$ 60,307,000
Households Supported	994	329	1,323
Annual Economic Output	\$ 106,354,000	\$ 84,133,000	\$ 190,487,000

NORTHEAST REGION IMPACTS

2018 REGIONAL OVERVIEW

- 58 craft brewers
- Approximately 30,000 barrels produced
- More than \$132,000 and 5,465 volunteer hours contributed by OCBA survey respondents

In 2018, the craft brewers in the Northeast Region of Ohio directly and indirectly generated an estimated \$46 million of economic output in the State of Ohio through their ongoing operations. The Region's craft brewers supported an estimated 706 jobs in the State of Ohio which had approximately \$17 million of associated labor income, including benefits. These jobs and earnings sustained an estimated 481 households in the State of Ohio.

The activities of the Northeast Ohio craft brewers generated an estimated \$5.6 million of state and local taxes and \$2.6 million of federal taxes during 2018.

2018 NORTHEAST REGION ESTIMATED IMPACTS ON THE STATE OF OHIO



2018 NORTHEAST REGION IMPACTS DETAIL

	Direct	Indirect	Total
Jobs	578	128	706
Annual Earnings	\$ 10,529,000	\$ 6,803,000	\$ 17,332,000
Households Supported	394	87	481
Annual Economic Output	\$ 24,641,000	\$ 21,815,000	\$ 46,456,000

CENTRAL REGION IMPACTS

2018 REGIONAL OVERVIEW

- 45 craft brewers
- Approximately 140,000 barrels produced
- More than \$142,000 and 1,615 volunteer hours contributed by OCBA survey respondents

In 2018, the craft brewers in the Central Region of Ohio directly and indirectly generated an estimated \$111 million of economic output in the State of Ohio through their ongoing operations. The Region's craft brewers supported an estimated 1,296 jobs in the State of Ohio which had approximately \$37 million of associated labor income, including benefits. These jobs and earnings sustained an estimated 883 households in the State of Ohio.

The activities of the Central Ohio craft brewers generated an estimated \$14 million of state and local taxes and \$6.2 million of federal taxes during 2018.

2018 CENTRAL REGION ESTIMATED IMPACTS ON THE STATE OF OHIO



2018 CENTRAL REGION IMPACTS DETAIL

	Direct	Indirect	Total
Jobs	1,006	290	1,296
Annual Earnings	\$ 21,841,000	\$ 15,585,000	\$ 37,426,000
Households Supported	685	198	883
Annual Economic Output	\$ 60,836,000	\$ 50,151,000	\$ 110,987,000

WEST CENTRAL REGION IMPACTS

2018 REGIONAL OVERVIEW

- 23 craft brewers
- Approximately 19,000 barrels produced
- More than \$111,000 and 1,920 volunteer hours contributed by OCBA survey respondents

In 2018, the craft brewers in the West Central Region of Ohio directly and indirectly generated an estimated \$34 million of economic output in the State of Ohio through their ongoing operations. The Region's craft brewers supported an estimated 483 jobs in the State of Ohio which had approximately \$12.6 million of associated labor income, including benefits. These jobs and earnings sustained an estimated 329 households in the State of Ohio.

The activities of the West Central Ohio craft brewers generated an estimated \$4.1 million of state and local taxes and \$1.9 million of federal taxes during 2018.

2018 WEST CENTRAL REGION ESTIMATED IMPACTS ON THE STATE OF



2018 WEST CENTRAL REGION IMPACTS DETAIL

	Direct	Indirect	Total
Jobs	389	94	483
Annual Earnings	\$ 7,646,000	\$ 4,980,000	\$ 12,626,000
Households Supported	265	64	329
Annual Economic Output	\$ 18,158,000	\$ 15,975,000	\$ 34,133,000

SOUTHWEST REGION IMPACTS

2018 REGIONAL OVERVIEW

- 55 craft brewers
- Approximately 940,000 barrels produced
- More than \$439,000 and 2,680 volunteer hours contributed by OCBA survey respondents

In 2018, the craft brewers in the Southwest Region of Ohio directly and indirectly generated an estimated \$503 million of economic output in the State of Ohio through their ongoing operations. The Region's craft brewers supported an estimated 2,678 jobs in the State of Ohio which had approximately \$104 million of associated labor income, including benefits. These jobs and earnings sustained an estimated 1,824 households in the State of Ohio.

The activities of the Southwest Ohio craft brewers generated an estimated \$67 million of state and local taxes and \$27 million of federal taxes during 2018.

2018 SOUTHWEST REGION ESTIMATED IMPACTS ON THE STATE OF OHIO



2,678 jobs



\$104 million of annual labor income



1,824 households supported



\$67 million in annual state and local taxes



\$27 million in annual federal taxes



\$503 million of annual economic output

2018 SOUTHWEST REGION IMPACTS DETAIL

	Direct	Indirect	Total
Jobs	1,640	1,038	2,678
Annual Earnings	\$ 44,501,000	\$ 59,415,000	\$ 103,916,000
Households Supported	1,117	707	1,824
Annual Economic Output	\$ 308,409,000	\$ 194,612,000	\$ 503,021,000

SOUTHEAST REGION IMPACTS

2018 REGIONAL OVERVIEW

- 34 craft brewers
- Approximately 51,000 barrels produced
- More than \$110,000 and 454 volunteer hours contributed by OCBA survey respondents

In 2018, the craft brewers in the Southeast Region of Ohio directly and indirectly generated an estimated \$52 million of economic output in the State of Ohio through their ongoing operations. The Region's craft brewers supported an estimated 734 jobs in the State of Ohio which had approximately \$19 million of associated labor income, including benefits. These jobs and earnings sustained an estimated 500 households in the State of Ohio.

The activities of the Southeast Ohio craft brewers generated an estimated \$6.2 million of state and local taxes and \$2.9 million of federal taxes during 2018.

2018 SOUTHEAST REGION ESTIMATED IMPACTS ON THE STATE OF OHIO



734 jobs



\$19 million of annual labor income



500 households supported



\$6.2 million in annual state and local taxes



\$2.9 million in annual federal taxes



\$52 million of annual economic output

2018 SOUTHEAST REGION IMPACTS DETAIL

	Direct	Indirect	Total
Jobs	592	142	734
Annual Earnings	\$ 11,529,000	\$ 7,523,000	\$ 19,052,000
Households Supported	403	97	500
Annual Economic Output	\$ 27,473,000	\$ 24,135,000	\$ 51,608,000

OTHER IMPACTS

The industry's impact extends far beyond quantitative economic measures and some of these many contributions, as reported by brewers in the OCBA 2019 Member Survey, are highlighted here.

CONSTRUCTION IMPACTS

Survey respondents, which represent only a portion of the craft brewers in the State, reported investing more than \$27 million in construction projects and over \$23 million on equipment in 2018. These investments are expected to continue in the near future, with more than 100 of the 140 survey respondents stating their brewery plans to expand production within the next two years and over 80 respondents planning facility expansions within the next two years. Spending on construction projects and equipment creates significant economic ripple effects throughout Ohio that are not fully captured in the economic impact estimates of this report.

ECONOMIC AND COMMUNITY DEVELOPMENT

Much of the economic impact of the craft brewing industry occurs in neighborhoods 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 pop-up art shows, concerts, workshops, fundraisers, and countless other place-making activities. These activities contribute immeasurably to the fabric of the communities in which the breweries operate.

Ohio craft brewers also give back to their communities through a wide range of efforts from charitable happy hours, to river clean-ups, to donations to food banks. The 137 brewers that responded to the survey contributed a total of \$1.15 million in charitable contributions and donated over 13,000 volunteer hours in 2018.

MEMBER AND INDUSTRY PARTICIPANTS

Dr. Bart Watson of the Brewers Association provided valuable industry data which was critical to the development of this report. Additionally, more than 137 members of the Ohio Craft Brewers Association participated in the OCBA 2019 Member Survey. The names of the participating breweries appear below and their participation is sincerely appreciated.

Participating OCBA Breweries		
16 Lots Brewing Co.	HighGrain Brewing Company	Parsons North Brewing Company
2 Tones Brewing Co.	HiHO Brewing Company	Phoenix Brewing Company
4kd Crick Brewery	Homestead Beer Co.	Pinups and Pints
Bad Tom Smith Brewing	Hoodletown Brewing Company	Platform Beer Co. - Cleveland
Barley's Brewing Co.	Hop Tree Brewing	Portsmouth Brewing Co.
Biker Brewhouse	Hoppin' Frog Limited	Pretentious Barrel House
Birdfish Brewing Co.	Ignite Brewing Company	R.Shea Brewing
Bookhouse Brewing	Ill Mannered Brewing Company	Railroad Brewing Company
Boston Beer Corporation	Inside The Five Brewing	Company
Branch & Bone Artisan Ales	Jackie O's Pub & Brewery	Restoration Brew Worx
Brew Brothers	JAFB Wooster	Rivertown Brewery & Barrel House
Brink Brewing Co.	Jolly Scholar	Rocky River Brewing Co
Buckeye Lake Brewery	Lager Heads Brewing Company	Roundhouse Depot Brewing Co.
Buck's Brewing Company	Laird Arcade Brewery - The LAB	Royal Docks Brewing Company
Butcher and the Brewer	Lake Rat Brewing	Sandy Springs Brewing Company
Canton Brewing Company	Land-Grant Brewing Co.	Saucy Brew Works
Catawba Island Brewing Company	Lineage Brewing	Seventh Son
Christian Moerlein Brewing Co.	Listermann Brewing / Triple Digit Brewing	Shale Brewing Company
Columbus Brewing Company	Little Fish Brewing Co.	Sibling Revelry Brewing
Combustion Brewery & Taproom	Little Miami Brewing Co.	SideSwipe Brewing Co.
Common Beer Company	Lock 27 Brewing - Dayton	Smokehouse Brewing Company
Commonhouse Ales	Lockport Brewery	Somewhere In Particular Brewing
Cornerstone Brewing Co	MadTree Brewing Co.	Sonder Brewing
Crooked Handle Brewing Company	Magic City Brewing Company	Staas Brewing Company
Dalton Union Winery & Brewery	Maize Valley Brewery	Star City Brewing Company
DankHouse Brewing Company	Maple Lawn Brewery	Streetside Brewery
Dayton Beer Company	March First Brewing Company	Taft's Brewing Co.
Devil Wind Brewing	Marietta Brewing Co.	Tailspin Brewing Co.
Double Wing Brewing Company	Masthead Brewing Company	Terrestrial Brewing Company
Dungeon Hollow Brewing	Maumee Bay Brewing Co	Thirsty Dog Brewing Co
Earnest Brew Works	McArthur's Brew House	Three Tigers Brewing Company
Elevator Brewing Co LLC	Millersburg Brewing Co.	Toxic Brew Company
Eudora Brewing Company	Missing Falls Brewery	Trek Brewing Company
Fat Head's Brewery & Tap House	Mother Stewart's Brewing Company	Twin Oast Brewing
Fibonacci Brewing Co.	Municipal Brew Works	Two Bandits Brewing Company
Fifty West Brewing Co.	Muskellunge Brewing Company	Two Monks Brewing Company
Findlay Brewing Company	Nine Giant Brewing	Upside Brewing
Fretboard Brewing	Noble Beast Brewing Company	Urban Artifact
Geo. Wiedemann Brewing Co.	Nocterra Brewing Company	Wadsworth Brewing Company
Goldhorn Brewery	North High Brewing	Warped Wing Brewing Company
Gordon Biersch Brewery	Northern Row	Wild Ohio Brewing Company
Grainworks Brewing Company	Numbers Brewing Company	Willoughby Brewing
Granville Brewing Co.	Olentangy River Brewing Company	Wolf's Ridge Brewing
Great Lakes Brewing Co.	Outerbelt Brewing	Wooly Pig Farm Brewery
Grove City Brewing Company	Paladin Brewing Company	Yellow Springs Brewery
Hairless Hare Brewery	Paradigm Shift Brewery	

STUDY METHODOLOGY

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, with the ripples being 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 case activities of the Ohio craft breweries).

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.

ABOUT IMPLAN

Portions of this analysis were completed using the IMPLAN (IMpact Analysis for PLANning) economic impact modeling system. IMPLAN is a general input-output model that was originally developed by the U.S. Forest Service in the 1970's and is now 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 derived from industry surveys conducted periodically by the U.S. Bureau of Economic Analysis (BEA), as well as other sources.

ABOUT THE OCBA

The Ohio Craft Brewers Association was founded more than a decade ago 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. For Ohio brewers, the OCBA offers advertising and marketing opportunities, industry updates, numerous member events, insurance discounts, advocacy benefits, and other benefits.

ABOUT SILVERLODE CONSULTING

Silverlode Consulting was founded in 2002 by two leaders of EY's and Pricewaterhouse Coopers' 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 the area of economic impact analysis can be found on our website at www.silverlodeconsulting.com.

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
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).
Earnings	Actual wages and benefits associated with Direct jobs.	IMPLAN estimate of the total labor income (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.
Output	IMPLAN estimate of the total value of goods and services produced by the activity being modeled. Output often represents sales or revenue associated with this activity.	IMPLAN estimate of the total value of goods and services produced by Indirect and Induced economic activity. Output often represents sales or revenue associated with this 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.