

DEVELOPMENT OF THE IMPORTANCE OF SELECTED MARKETING COMMUNICATION TOOLS OF MICROBREWERIES WITH REGARD TO THEIR COMPETITIVENESS – A CASE STUDY FROM THE CZECH REPUBLIC

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Abstract: Czech Republic is first in beer consumption per capita worldwide. In 2023, this consumption was 128 litres per capita, beer culture is deeply rooted here. A significant increase in the number of microbreweries and popularization of at-home beer brewing has been taking place since 2010. Production volume of microbreweries makes up 2.5% of the overall production volume of beer in the Czech Republic. With the number of microbreweries increasing, so does the competitive pressure in this market. What tools of marketing communication are important to the owners of microbreweries considering their competitive ability is a question that we will deal with in this paper. The research took place in 2016 and 2023, the data were acquired using a questionnaire and controlled interviews. The research sample constitutes of 30 microbreweries. The selected marketing communication tools were divided into three groups. The results of the first and second group (tools of targeted marketing communication and tools of marketing communication used at the sales site) are presented in this paper. The results show that only a few of the marketing communication tools have undergone a shift in their importance. However, a significant change can be seen in a number of microbreweries which deem these tools as important.

Keywords: Microbreweries, marketing communication, competitiveness.

1 Introduction

Beer is the national product of Czech Republic, and even though its consumption has been decreasing worldwide, Czech Republic is still leading in this area. Czech Republic also takes the lead since 2015 is the number of microbreweries per capita. Beer is an inseparable part of Czech culture; this fact is mirrored in a significant increase in the number of both established and operating microbreweries in recent years. Microbreweries usually produce between 500 and 3 000 hl of beer per year (maximum production volume being 10 000 hl/year) where most of the beer is meant for immediate consumption in the microbreweries' own pubs. There are also microbreweries with a larger production volume, where the beer is distributed mainly to restaurants and establishments located in immediate vicinity of the microbrewery. This is caused by the traditional way of brewing unpasteurised and unfiltered beer, which has a positive impact on taste, colour and flavour profile, but a negative impact on its expiration date, which is rather short.

2 Theoretical overview

A brand-new type of brewery has established itself on the Czech market – microbreweries. Their increase in recent years is steady and constitutes of approximately 20 new microbreweries per year. There were 350 microbreweries in the Czech Republic in 2016, in 2023 this number rose up to 508. Some of them are already well established on the market, steadily increasing their production volume, activities and number of employees. Others do not attempt to increase their production volume, either because their production capacity has been met, or because of the intent of their establishment. According to research results in this area, there are two main reasons for establishing a microbrewery (Cabras, 2016). The first one is pure enthusiasm for beer and an effort to brew one's own, with regards to personal requirements for taste and quality. The second one is a business plan. Like other quickly growing markets (more than 10% per year), microbreweries are also attractive for investors who are seeing a significant momentum in this industry.

The overall production volume (meaning production volume of the brewing industry) in the Czech Republic was 18 million hl of beer in 2023, where microbreweries (breweries with a production volume of up to 10,000 hl per year) contributed

roughly 2.5% (Tvořimeevropu.cz). Other sources state that it was up to 2.8% (Czech Association of Breweries and Malthouses, 2022). It is likely that microbreweries' share on the overall production volume is going to keep increasing as their numbers rise, just like in other European countries which are also experiencing this boom. Although it most likely won't ever exceed tens of percent (Pokrivčák, 2019). As stated above, the number of microbreweries in the Czech Republic keeps increasing, which creates a competitiveness within the industry.

Competitiveness in this specific segment is therefore a pressing question these days. Some sources state that it does not exist (Pivovary, 2020). On the contrary, others speak of the beginning of competitiveness, taking the number of microbreweries and current trends into account (Ekonom, 2023). One of the tools enhancing competitive abilities of microbreweries is marketing communication, which they use aside from communicating via their product itself (Březinová, 2019).

Marketing communication includes all visual, written, spoken and sensory aspects of interaction between a company and its target market (Haris, 2024; Ilwoo, 2018). This communication is mostly of commercial nature and aims to influence cognitive, motivational and decision-making processes of those we want to influence according to our intentions. This is done by utilizing the information that is being shared (Hamizar, 2023; Zein, 2023).

Few theoretical approaches can be used to systematically divide the rather large scope of marketing communication techniques and tools. For example, a part of 4P communication mix used by Kotler (1998) where the author puts the following: advertisement, direct sales, personal sales, PR and sales support. Or Peslmacker's (2003) communication mix, which constitutes of: advertisement, sales support, sponsorship, public relations, communication at the sales site, exhibitions and fairs, direct marketing communication, personal sales and interactive marketing.

All of the abovementioned techniques and tools are being used within the brewing industry. One of the most prominent factors influencing the communication mix is the size of a brewery, or rather its financial strength and also the specifics of its customer base (Vacl, 2013). From this angle, we can categorize marketing communication as either mass-focused, which uses mass communication tools and aims for as many potential customers as possible; this is mostly used by industrial breweries (production volume of up to 500K hl per year), or as targeted, which uses personal communication channels to target a specific group of customers; this is mostly used by microbreweries (Djuric, 2016; Camilleri, 2017).

Microbreweries on the Czech beer market usually use their product – beer – to communicate with their customers. Their core value is uniqueness and locality (Cortese, 2017; Kincl, 2022). Their promotion is therefore secured by the so-called *word of mouth* technique, meaning verbally transmitted information that satisfied customers and craft beer enthusiasts share (Lars, 2014; Boyer, 2015; Brewer, 2023). This phenomenon has another effect for microbreweries – beer tourism, which is very similar to wine tourism (Vacl, 2014; Colleen, 2018; Slocum, 2018; Bachman, 2021).

The most crucial factor affecting the choice of marketing tools for microbreweries and SMEs in general is finance (Ahmed, 2019). For this reason, mass communication channels are not being utilized (these means would be rather ineffective for microbreweries' target group), but personal, targeted marketing channels are. These are social media and others, which are cheaper and better suited for reaching regional or even local markets; this business practice is called “around the chimney” in Czech brewing industry jargon (Březinová, 2019).

Communication mixes of microbreweries usually consist of marketing communication tools used at the sales site and tools bearing the microbrewery's logo, for example glasses, coasters, signboards and so on. Another significant group consists of tools targeting the local community, such as sponsoring local associations and clubs, organizing cultural events and more (Březinová, 2021).

The question that the authors answer in this paper is: Which marketing communication tools do selected microbreweries' owners in the Czech Republic deem as important, with regard to their competitive ability.

3 Methodology

The data was acquired in 2016 and 2023. During those years, both quantitative and qualitative research method was used, as well as a questionnaire and a guided interview. In 2016, 30 microbreweries were selected using the method of random selection and asked to participate (all of the microbreweries have agreed). First, an electronic questionnaire was sent out to the microbreweries. A personal visit and the interview followed, which served to supplement and verify the data from the questionnaire. This process was carried out both during the 2016 and the 2023 data collection. Here, we would like to thank all the owners for their helpfulness and willingness to participate in this project. In this paper, we therefore analyse and compare data from the same microbreweries in a 7-year range, which illustrates a development of importance of marketing communication tools used by specific microbreweries in the Czech Republic.

According to (Kotler, 1998; Pelsmecker, 2003) theory, 26 tools of marketing communication, which were used in this project, were established. In the questionnaire, the respondents (owners or operators of microbreweries) determined the importance of each marketing communication tool using a 4-level scaling system as follows: very important (4), important (3), less important (2), not important (1). Each marketing communication tool was assigned into one of three groups (mass communication tools, targeted communication tools and communication tools used at the sales site) by analysing the data from the questionnaires and interviews to make the results clearer. In this paper, development results of two of the marketing communication tools are discussed. The first group focuses on tools of targeted marketing communication, which contains: social networks, renown, organising cultural events, sponsoring local clubs, having their own website, recommendations of current customers and customer competitions. The second group focuses on marketing communication tools used at the sales site, which includes: labels, beer coasters, beer glasses, tablecloths, signboards, paid and free tastings, sales and excursions.

Regarding the research question "Are marketing communication tools in the same group equally important to microbreweries, taking their competitive ability into account?", two alternate hypotheses were established,

H0 – All marketing tools in the group are of equal importance.

H1 – At least one marketing tool in the group has either higher or lower level of importance than the rest.

The differences between frequency of answers were tested using Pearson's chi-squared test using χ^2 (chi-square), assuming that all tools of marketing communication in a group are equally important to microbreweries, considering their competitive abilities. Histograms were also used.

For a clearer percentual evaluation of each tools' importance, the answers very important (4) and important (3) were grouped together, same as less important (2) and not important (1).

4 Results and discussion

The data was subjected to such a statistical research so that we could either confirm or refute one of the hypotheses. The importance of a specific group of marketing communication tools to the owners or operators of microbreweries considering their competitive abilities is shown in the following results: Just as is stated in the methodology, these are specific groups of marketing communication tools; tools of targeted marketing communication and tools used at the sales site.

The results of Kendall's coefficient of concordance are based on the 2016 data and represented in tables 1 and 2. They refute H0 – all marketing tools in the group are of equal importance. Importance level of $p < 0.5$, which happens if p is less than 0.5; in our case, $p = 0.00000$ for both groups. H0 is therefore refuted for both groups. Some marketing communication tools from selected groups have thereby been more important to microbreweries in 2016 than others. Results from 2023 also refute H0 as $p = 0.00002$ for both groups. It is therefore confirmed that in 2023, some marketing communication tools within the same group are more or less important to microbreweries considering their competitive abilities, as is shown in tables 3 and 4.

Table 1 Kendall's coefficient of concordance for tools of targeted marketing communication of microbreweries in 2016.

Marketing communication tools	Friedmanova ANOVA a Kendallův coefficient of sameness (M_tools 1) ANOVA chí-kv. (N=30, sv=8)=448,9607 p=0,00000 Coefficient of sameness =,38704 Average. R=,38278			
	Average rank	Rank sum	Average	Deter. diverg.
Consumer competitions	1,685217	254,0000	1,759817	0,792587
Recommendation of current customers	5,462817	789,5000	3,982439	0,499217
Own website	4,498951	672,0000	3,528921	0,701124
Local clubs sponsorship	2,736841	395,0000	2,247820	1,126512
Cultural events organisation	3,487421	505,0000	2,784210	0,887504
Social networks	4,682157	670,0000	3,348276	0,807411
Brewery's renown	5,496502	783,0000	3,902069	0,517040

Source: Our research

Table 2 Kendall's coefficient of concordance for tools of marketing communication of microbreweries at the sales site in 2016.

Marketing communication tools	Friedmanova ANOVA a Kendallův coefficient of sameness (M_tools 2) ANOVA chí-kv. (N=30, sv=8)=448,9607 p=0,00000 Coefficient of sameness =,38704 Average. R=,38278			
	Average rank	Rank sum	Average	Deter. diverg.
Labels	6,831457	964,5000	3,024875	1,047428
Beer coasters	5,321112	761,0000	2,327931	1,086666
Tablecloths	2,475211	349,0000	1,021379	0,520105
Beer glass	6,982314	982,0000	3,020152	1,521423
Signboard	6,210251	888,0000	2,532276	1,025346
Tastings free	4,326742	609,0000	1,987479	0,698402
Tastings paid	3,898845	561,0000	1,358966	1,009534
Sales	3,113421	453,0000	1,394138	0,795654
Excursion	6,374581	912,5000	2,982519	1,109845

Source: Our research

Table 3 Kendall's coefficient of concordance for tools of targeted marketing communication of microbreweries in 2023.

Marketing communication tools	Friedmanova ANOVA a Kendallův coefficient of sameness (M_tools 1) ANOVA chí-kv. (N=30, sv=8)=448,9607 p=0,00002 Coefficient of sameness =,38704 Average. R=,38278			
	Average rank	Rank sum	Average	Deter. diverg.
Consumer competitions	1,102110	238,0000	1,526177	0,893087
Recommendation of current customers	6,289412	882,0000	3,998457	0,542187
Own website	6,891245	721,0000	3,982406	0,799784
Local clubs sponsorship	4,612492	623,0000	3,652140	1,021590
Cultural events organisation	4,982144	598,0000	3,257910	0,989504
Social networks	6,521372	723,0000	3,448276	0,857411
Brewery's renown	6,125845	801,0000	4,023197	0,603187

Source: Our research

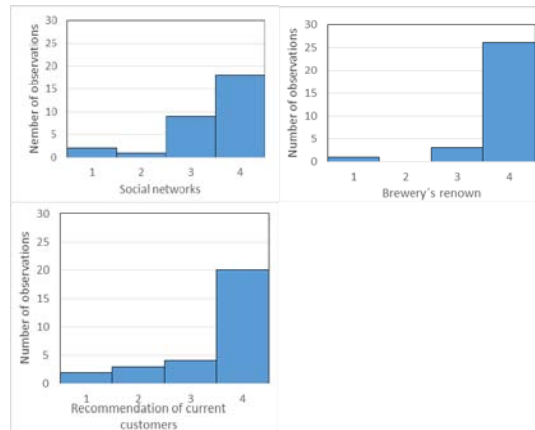
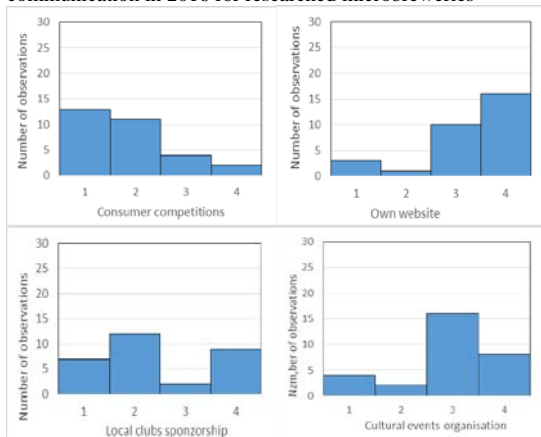
Table 4 Kendall's coefficient of concordance for tools of marketing communication of microbreweries at the sales site in 2023.

Marketing communication tools	Friedmanova ANOVA a Kendallův coefficient of sameness (M_tools 2) ANOVA chí-kv. (N=30, sv=8)=448,9607 p=0,00002 Coefficient of sameness =,38704 Average. R=,38278			
	Average rank	Rank sum	Average	Deter. diverg.
Labels	7,203121	998,5000	3,013793	1,042302
Beer coasters	5,685527	825,0000	2,537931	1,986521
Tablecloths	3,825412	542,0000	1,241379	0,604105
Beer glass	7,233698	975,0000	2,896552	1,122523
Signboard	7,259847	952,0000	2,848276	1,180460
Tastings free	3,685147	524,0000	2,041379	0,873020
Tastings paid	5,298412	838,0000	1,868966	1,042534
Sales	1,982547	269,0000	1,524138	0,825654
Excursion	7,125873	983,5000	3,241379	1,065076

Source: Our research

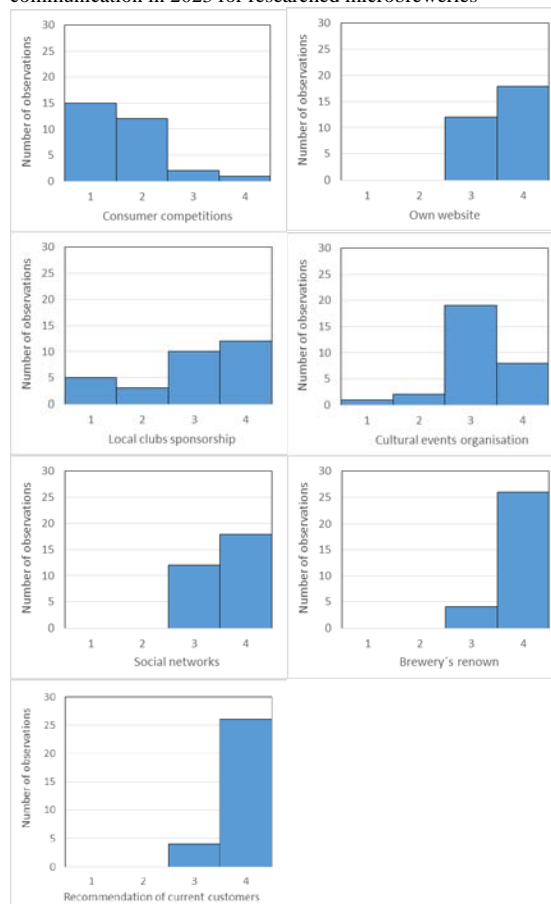
The following tools were found to be of the greatest importance in the first group: renown of the brewery, their own website and social networks. In the second group, it was: labels, beer coasters, beer glasses and signboards (graphs 1 and 2). In 2023, the most important tools of the first group were found to be the same as in 2016 - renown of the brewery, their own website and social networks, but newly also the recommendations of current customers (graphs 3 and 4). For the second group it's labels, beer coasters, beer glasses and signboards, same as in 2016. This means that between 2016 and 2023, there is no difference between the importance of specific marketing communication tools considering the competitive abilities of the microbrewery. However, according to specific results (graphs 1 to 4) it is clear that the microbrewery's owners or operators' perception of these tools' importance has shifted.

Graph 1 Histograms of specific tools of targeted marketing communication in 2016 for researched microbreweries



Source: Our research

Graph 2 Histograms of specific tools of targeted marketing communication in 2023 for researched microbreweries

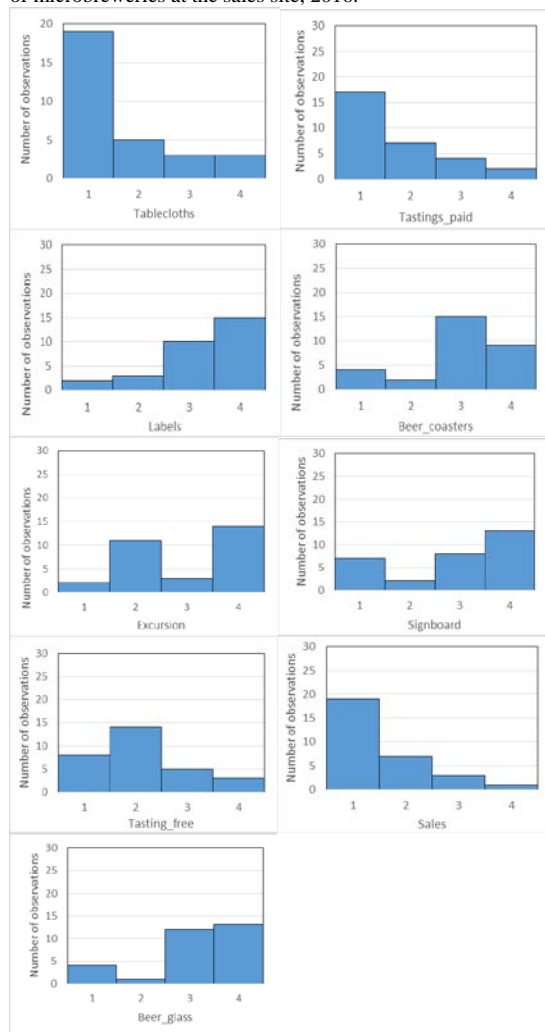


Source: Our research

In the first group of specific marketing communication tools, almost all selected tools have undergone a shift. Renown of a microbrewery was very important or important for 97% of questioned breweries in 2016, while in 2023 this number rose to 100%. Having one's own website and social networks has experienced a similar change, from 83% and 90% in 2016 respectively, to a 100% for both tools in 2023. Even the recommendation of current customers, which has been deemed as very important or important by 83% of microbreweries in 2016 has risen to a 100% in 2023. Next, the owners or operators of microbreweries see organising cultural events as more important in 2023, and the biggest difference in perception can be seen in sponsoring of local clubs. This tool has been very important or important to 37% of researched microbreweries in 2016, while in 2023 it is 73% of microbreweries. All

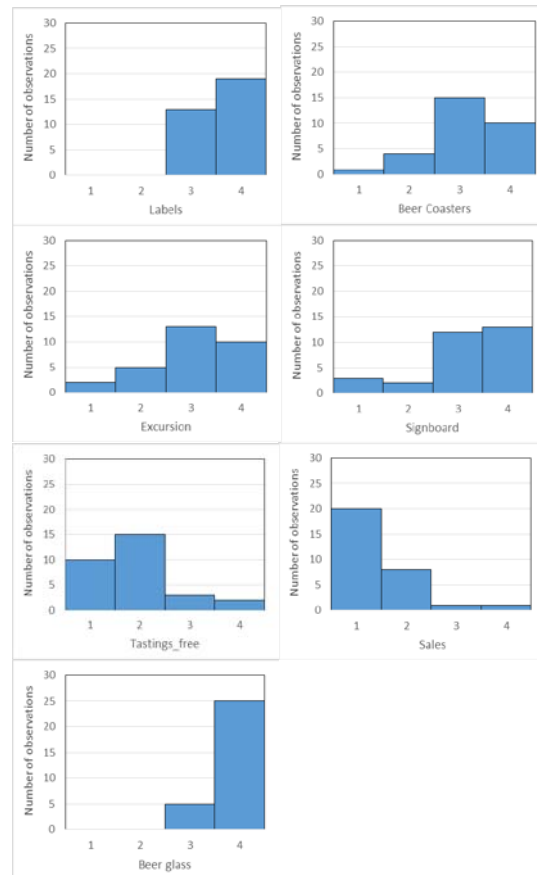
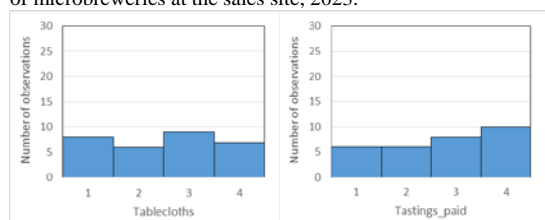
abovementioned results support the fact that microbreweries are targeting their local customers more and more and are becoming another tool of regional development. On the contrary, the last monitored tool of customer competition, which was important or very important to 20% of microbreweries in 2016 is only important to 10% of microbreweries in 2023. It is the only tool whose importance has decreased. This decrease might be caused by a temporary closure during the pandemic due to covid-19, where the microbreweries have not been reopened. In spite of this, results of our research show that microbreweries are becoming an important part of regional development. Lepič (2023) is of the same opinion. Microbreweries are also becoming cultural centres of towns and municipalities, a fact supported by the importance of hosting cultural events and sponsoring local clubs. This result is also confirmed in De Jong(2023) research.

Graph 3 Histograms of specific marketing communication tools of microbreweries at the sales site, 2016.



Source: Our research

Graph 4 Histograms of specific marketing communication tools of microbreweries at the sales site, 2023.



Source: Our research

There has also been an increase in the importance of marketing communication tools in the second researched group, except for one. This tool is sales, which were seen as important for 13% of microbreweries in 2016 (this number is already rather low in comparison to other tools) and in 2023, sales are only important to 7% of microbreweries. This development might be caused by the fact that even though there is an increasing competitiveness in this market, microbreweries do not have to undercut their products. This means that their target group is not sensitive to the product's price, which corresponds with Lerro (2020) and Rizzon (2022) research results. All other monitored tools have increased in importance, for example labels and beer coasters were important or very important to 83% of microbreweries in 2016, while in 2023 it was a 100%. The biggest difference between 2016 and 2023 can be seen in tablecloths, which have gone from 20% to 53%, and paid tastings, which were only important to 20% of microbreweries in 2016 and have since gone up to 60% in 2023. On the other hand, the importance of free tastings has decreased from 27% to 17%. A significant difference can also be seen in excursions, which shifted from 57% to 77%. Last two monitored tools have also undergone an increase in importance considering the competitive ability of the researched microbreweries. Signboards were important or very important to 70% of microbreweries in 2016, while in 2023 this number rose to 83%. Beer coasters have seen only a slight increase, from 80% to 83%. All abovementioned results support the theory that microbreweries, even though they do not have to undercut their prices by discounts and free tastings, are trying to gain new customers mostly by offering excursions and paid tastings of their products.

5 Conclusion

The results of the research have confirmed that the importance of specific marketing communication tools of selected microbreweries between 2016 and 2023 is increasing. As the number of establishments in this market rises, so does the competitive pressure and even though microbreweries mostly

communicate with their customers via their products, marketing communication tools are also important to them, as they improve their competitive ability in this area. We can see from the results that the selected microbreweries deem marketing communication tools which target the local consumer as important, such as sponsoring of local clubs or organising cultural events, but also those tools which are trying to attract new customers, such as excursions or paid tastings. Tools undercutting the price, such as sales and free tastings are not important to this segment. This might be caused by the loyalty of consumers who perceive the microbrewery's products as having added value, which is mostly created by the local production, quality ingredients and last but not least hand brewing. Next, the results imply that microbreweries are becoming a major factor in regional development, which is represented in the importance of supporting local clubs and also supporting cultural centres of municipalities, or rather becoming such cultural centres themselves. This is reflected in the importance of organising cultural events and so on. The authors are well aware of the limitations of this project, which has not been carried out on a representative sample of microbreweries. In our next research, we would like to demonstrate a positive influence of microbreweries on a sustainable development of municipalities using a representative sample of microbreweries.

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