

The Role of Travel in Business Portfolio of Czech Mini-Breweries in the Covid Pandemic Period

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Abstract: *Purpose:* The aim of this paper is to propose a way to minimize the negative impacts of COVID-19 pandemic on the activities of mini-breweries. Research questions: Has pandemic affected the decrease in mini-breweries production? Can tourism help to save mini-breweries? What specific problems has the pandemic caused to mini-breweries? How do mini-breweries solve their problems?

Research Methods: The paper presents a comparative analysis of the results of primary sources obtained through a questionnaire survey. The research tool used was an online survey conducted between 10 September and 10 October 2020 capturing answers from 59 mini-breweries in the Czech Republic. The survey examined effects of the pandemic, views on the changing beer market, mitigation measures, effects on demand for beer and other services and evaluation of government measures. Minibreweries were contacted in writing or in person. There were three categories for the length of operation of the minibrewery on the market. 33 microbreweries have been on the market for more than 5 years, 23 for a period of 2 to 5 years and the remaining 3 have been on the market for less than 2 years. It was also examined where mini-breweries have their headquarters. The majority of respondents was from municipalities with less than 2,000 inhabitants, a total of 14. Cities of 2 – 5 000 habitants were represented by 6 microbreweries, 5 – 10 000 by 8, 10 – 50 000 by 9, 50 – 100 000 by 1 and larger than 100 000 by 9. The second largest group consisted of breweries from Prague with 12 responses.

Results and Discussion: The pandemic negatively or rather negatively affected the economy of mini-breweries (75%). The pandemic did not affect the economy at all (10%). It is too early to assess effects of the pandemic (10%). The economy of mini-breweries has improved (5%). The pandemic caused a dramatic drop in sales (67.8%). The mini-brewery lost customers (40.7%). The mini-brewery sustained economic losses due to the wastage of already brewed beer (25.4%). The mini-brewery lost employees (22.0%). The pandemic had no impact (16.9%). The mini-brewery reported higher sales (1.7%). Mini-breweries responded to the situation: 76.3% opened a takeaway window; 59.3% distributed beer to clients; 52.5% changed the structure of beer bottling; 45.8% started using

social media more; 42,4 % increased Internet advertising; 40.7% started online sales; 10.2% reduced the range of products. Brewers perceive tourism as a possible starting point. The role of off-trade is often mentioned, as well as the price of beer as factors influencing the demand for beer.

The research clearly confirmed the need to strengthen the role of tourism as a tool to reduce the impact of the COVID-19 pandemic on microbreweries. It demonstrates the need for a specific focus on a specific tourist segment coming to the Czech Republic, not only in beer or gastronomic tourism but also in experiential, cultural-historical and educational tourism in deeper cooperation with destination management organizations.

Implications: The pandemic has an impact on the activities of mini-breweries, beer production has been reduced, employees have lost their jobs, premises have been closed and the number of customers dropped. Most mini-breweries have introduced product and marketing innovations. Renewed tourism can revive the activities of mini-breweries with their original products (tourist brewery tours, tastings, sale of souvenirs) and new ones (opening a beer museum, social and entertainment events, beer brewing experience courses, etc.). The research suggests the cooperation of several entities - mini-breweries with a specific DMO of the region in which the mini-brewery is located - the CzechTourism national tourism centre - by selected travel agencies or offices focusing on experiential gastronomy, beer, educational and cultural-historical tourism. As part of the proposed cooperation, it will be possible to streamline national and foreign marketing projects to raise the profile of mini-breweries and increase tourists' awareness of the existence of specific mini-breweries, their product range and thus their usability in tourism.

Keywords: Mini-breweries, tourism, COVID-19

INTRODUCTION

The main stimulus for this contribution was the need to map the impact of the Covid 19 pandemic on Czech microbreweries. The Czech Republic is known in the world for its beer production, brewing tradition and quality of Czech beer.

The Czech brewing industry has a rich history, dating back to the 9th century AD (Basařová et al.2010). Beer is one of the most popular drinks in the Czech Republic. Raw ingredients for beer production are exported from the Czech Republic to many countries around the world because malt and hops are among the highest quality raw materials for beer production. Czech brewers are invited anywhere in the world where they need to ensure the quality of beer brewing, its proper storage, bottling, etc. At present, the only state-owned brewery is Budějovický Budvar, other breweries in the Czech Republic are private. Mini-breweries have a significant role among private breweries. They have an irreplaceable place both in beer production and the maintenance of a healthy competitive environment in the quality of beer and its diversity.

During the COVID-19 pandemic, the private business sector in gastronomy, tourism and brewing was significantly affected, and therefore the need arose to analyze the impact of COVID-19 on the activities of mini-breweries. The Czech-Moravian Association of Mini-Breweries, the Professional Association of Small Breweries, organized a questionnaire survey in the period between 10 September and 10 October 2020. The purpose of the survey was to find out the impact of the pandemic on microbreweries, what they are doing to mitigate the negative effects, how they are assessing government measures and how they see the future in the market.

The purpose of this paper is to present the current situation of Czech microbreweries in the context of tourism, to reveal specific forms of cooperation of microbreweries with travel agencies, accommodation and catering facilities, CzechTourism, DMO (destination management organization) organizations and professional organizations operating in tourism.

The secondary intention is to reflect the changes that the activities of mini-breweries are already undergoing or the changes that mini-breweries will undergo under the influence of COVID-19.

The practical results are findings on the current situation of mini-breweries in the Czech Republic, support for their activities and measures that these entities had to take in order to maintain their own existence and maintain their production. In conclusion, there are suggestions for practice that could support the activities of mini-breweries in connection with the tourism of the Czech Republic and also help to revive the activities of travel agencies and other tourism entities affected in their activities by the COVID-19 pandemic.

LITERATURE REVIEW

In 2018, tourism accounted for 2.9% of the Czech Republic's GDP, which corresponds to EUR 6.12 billion. 241,000 people were employed in the tourism sector - accounting for 4.4% of total employment. Consumption in tourism (domestic and foreign visitors) amounted to EUR 11.8 billion, of which domestic tourism accounted for EUR 50.48 billion (43%) and inbound tourism for EUR 67.4 billion (57%). This value was generated by 32.27 million foreign visitors. Revenues from tourism exceeded expenditures by EUR 3.4 billion (CZSO, 2020). The main activity of two-thirds of tourists, whether domestic or foreign, is beer tourism in the Czech Republic (Pásková, Zelenka, 2012).

The Czech Republic is one of the countries with the oldest brewing history in Europe (Schmelzer, 1886), Zýbrt, 2005). Until the 9th century, beer has been brewed in the Czech Republic at home since the 9th century the official history of brewing began to unfold and already at that time it began to differ from other beers in the world: "...beer produced in the Czech Republic is a weak alcoholic which is which is formed by the controlled fermentation of a sugar solution boiled with hops or a hop product, fermented by a selected strain of brewer's yeast at technologically determined temperatures and times of the main fermentation and ageing of beer. Starch, contained in barley malt, is mostly used

as a source of sugar for beer in our country; if it is exceptionally replaced by another starchy raw material or directly by sugar, we speak of surrogacy and the substitute used is surrogate.” (Chládek, 2007, Zýbrt, 2005).

The mentioned production processes are what determine the uniqueness of Czech beer and predict its competitiveness on the international market. Due to the fact that large Czech breweries deviate from the traditional beer production, which mini-breweries proudly adopted, the increase in the number of mini-breweries and their growing popularity among residents and foreign tourists is understandable. The cooperation of mini-breweries with travel agency, housing and catering facilities, connected with other elements of beer tourism (Bujdosó, Szűcs, 2012; Vacl, 2014,2018) successfully supported the growing popularity until the first half of 2020.

RESEARCH METHODOLOGY

The main purpose of this paper is to present the results of a comparative analysis of the impact of the global pandemic COVID-19 on mini-breweries in the Czech Republic and to outline the measures the breweries have taken to mitigate the negative effects.

Research questions:

Has pandemic affected the decrease in mini-breweries production?

Can tourism help to save mini-breweries?

What specific problems has the pandemic caused to mini-breweries?

How do mini-breweries solve their problems?

The paper presents a comparative analysis of the results of primary sources obtained through a questionnaire survey. The research tool used was an online survey conducted between 10 September and 10 October 2020 capturing answers from 59 mini-breweries in the Czech Republic. The survey examined effects of the pandemic, views on the changing beer market, mitigation measures, effects on demand for beer and other services and evaluation of government measures. Minibreweries were contacted in writing or in person. There were three categories for the length of operation of the minibrewery on the market. 33 microbreweries have been on the market for more than 5 years, 23 for a period of 2 to 5 years and the remaining 3 have been on the market for less than 2 years. It was also examined where mini-breweries have their headquarters. The majority of respondents was from municipalities with less than 2,000 inhabitants, a total of 14. Cities of 2 – 5 000 habitants were represented by 6 microbreweries, 5 – 10 000 by 8, 10 – 50 000 by 9, 50 – 100 000 by 1 and larger than 100 000 by 9. The second largest group consisted of breweries from Prague with 12 responses. The comparative analysis, including a questionnaire survey, was carried out in cooperation with the Czech-Moravian Association of Mini-Breweries, the professional association of craft breweries and PORT spol. s r. o. agency.

The questionnaire consisted of seven questions, four of which were multi-choice, and respondents were asked to choose the one that best suited their opinion. Respondents had the opportunity to express their own opinion if none of the options corresponded to their opinion. The data collected will be used as leverage in negotiations with government authorities in order to ensure adequate support and positively influence business in the artisan brewery segment. Another methodological step was the analysis of adopted or proposed measures of the examined mini-breweries for the following period in connection with government measures, strategic materials of the ministries concerned and professional organizations. The analysis was performed using knowledge from literary research, further study of professional literature and conceptual documents. Procedures and entities have been defined that could, to varying degrees, contribute to supporting the maintenance of microbreweries and their activities.

The information obtained from secondary sources is enriched with data from primary sources- a questionnaire survey conducted in 2020, telephone interviews with employees of microbreweries and the results of a study by one of the authors of this paper (Vacl, 2014 and 2018). These studies analyzed the cooperation of small breweries with travel agencies, carriers and municipalities. The research addressed 100 mini-breweries from all over the Czech Republic. The first part of the research showed that 75% of mini-breweries not only offer gastronomic services in restaurants but also allow customers to look into beer production in the form of excursions in breweries and beer museum visits. Furthermore, the analysis evaluated the ratio of domestic and foreign visitors to mini-breweries and concluded that 52% of guests are locals, 26% are guests from other parts of the Czech Republic and 21% are foreign visitors.

The paper provides a comprehensive view of the current situation of mini-breweries in the Czech Republic, their role in tourism, presents an overview of measures already taken to maintain or revive their activities in the current crisis caused by the impact of the global pandemic COVID-19.

FINDINGS AND ANALYSIS

The first persons infected with a new type of coronavirus appeared in central China at the end of 2019. A few months later, on March 11, 2020, a COVID-19 pandemic was declared by the World Health Organization (WHO, 2020). Tourism, as an activity related to the movement of people and their encounters, is undesirable during the spread of a contagious disease. Therefore, this sector of the economy was hit first and travel as a non-priority leisure activity (compared to the importance of slowing down the spread of the disease) was among the last activities restored with strict adherence to hygiene measures. As a result of the pandemic, the number of employees worldwide has dropped by almost one billion. Due to the multidisciplinary nature of tourism, these losses affected providers of accommodation and catering services, including specific types of adventure tourism, including gastronomy and beer (UNWTO, 2020).

Numerical estimates of the impacts of measures related to the coronavirus pandemic on tourism in the Czech Republic were also published in June 2020 by the Confederation of Trade and Tourism. Overall, the drop of 50% was estimated compared to 2019. In order for the loss of income from incoming tourism from abroad to be compensated by domestic visitors, Czechs would have to have about 6-8 weeks of vacation in 2020 and spend thousands of crowns more than it is a habit for them (Panciř, 2020). The estimates at that time did not anticipate a worsening of the epidemiological situation in autumn 2020. The current most optimistic estimates point to return to pre-COVID-19 pandemic numbers is by the end of 2024 at the earliest (Trimble et al. 2020).

The residents will be the most important thing for tourism in the Czech Republic for the mentioned "bridging" period. Domestic tourism will also play an unmistakable role in beer tourism and support for the activities of mini-breweries. The results of the primary research of this paper also speak in favour of this theory, when the respondents clearly stated the preference of mini-breweries as opposed to large breweries. They cited the fact that large breweries in the Czech Republic are abandoning the traditional way of brewing beer, using traditional raw ingredients for its brewing and thus changing the taste and quality of beer. Respondents clearly agreed that what attracts them to Czech beer is precisely the unmistakable taste, quality, traditional ways of brewing the drink and the use of specific ingredients in its production. The relative speed and simplicity of establishing a brewery also speaks clearly for restarting the activities of mini-breweries, or the creation of new ones. Mini-breweries are most often established as part of restaurants. A functioning restaurant with sufficient unused space can expand its operation to include beer production within six months. The commissioning time of the brewery always depends on the initial state of the project. In the case of expanding the business of a company that already operates a restaurant, the process of establishing and commissioning a brewery is much shorter than in the case of establishing a new company and building a brewery on a "green field" (Egol, 2019). It can therefore be expected that a number of other mini-breweries will be established as a tool to support the sale and operation of existing restaurant facilities.

The existence and activity of mini-breweries is associated not only with domestic tourism, but also with inbound tourism, in this sector we can expect the biggest boom in connection with the gradual loosening restrictions and opening of the borders to surrounding countries, from which you can come to the Czech Republic by car. This fact manifested itself already in the summer of 2020, when tourists from Germany, Poland and Slovakia most often travelled to the Czech Republic (CZSO 2020b). A similar trend is likely to be observed in the coming years, as demand in the Europe tourist region is expected to increase from 2021, especially for shorter journeys over shorter distances (Trimble et al. 2020). Therefore, it will be appropriate to target the offer of mini-breweries and their products to the most important source countries (Germany, Poland, Slovakia) and their specifics, which can be seen as an opportunity for mini-breweries to re-

evaluate the current approach to tourism and cooperation with travel agencies, DMOs and other entities participating in tourism. It is possible to understand the impacts of the COVID-19 pandemic as an opportunity to build new cooperation, marketing strategies (which are confirmed by the results of primary research of this paper), creation of new tourist products (eg Beer Trails) and reorientation to other forms of tourism (Experiential beer gastronomy), targeting other tourist segments. Most of the addressed Czech mini-breweries became aware of this fact already during the COVID-19 pandemic and, in addition to the mentioned activities, changed or modified their business model, invested in new technologies, and expanded their product range. At present, however, it is difficult to estimate which new products or forms of tourism will gain a foothold in the activities of mini-breweries and what further measures the mini-breweries will have to take in order to maintain their activities and full business. According to the Association of Small and Medium-Sized Enterprises of the Czech Republic, they "strive to survive" by reaching out to existing and gaining new clients, and faces greater pressure on the quality of services provided - with emphasis on their sustainability, digitization and automation of related administration (reservations, orders, payments). AMSP CR, 2020).

In addition to the external barriers to tourism, such as travel restrictions when crossing borders (for example, the need for a negative virus test, health, subjective perceptions of the risk of infection, and economic ones, such as income restrictions, uncertainty and thus greater willingness to make savings), the internal obstacles can be named as well such as fear of infection and uncertainty about the course of the journey within the disruption of transport connections.

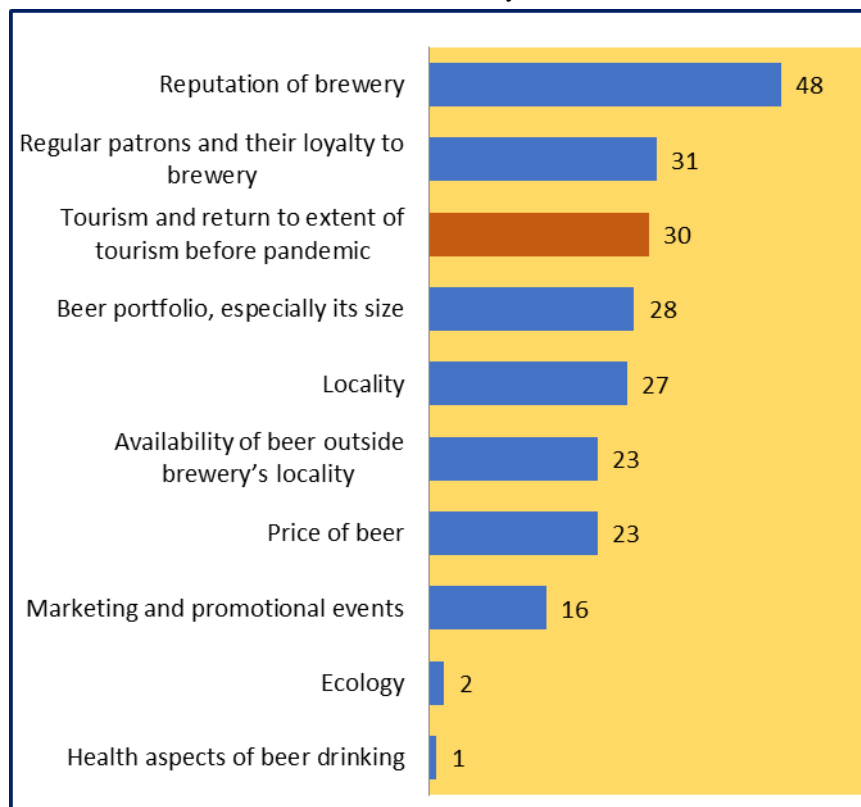
DISCUSSION

The Czech Republic is a major producer and exporter of beer. Given the brewing tradition lasting more than 10 centuries, it is understandable that the Czechs are among the largest consumers of beer in the world - the Czech Republic holds the record in beer consumption per person, in 2018 when there were 141 beers consumed per capita (CZSO, 2019). Mini-breweries are being established more and more often. Their popularity is growing not only among entrepreneurs but also among consumers. Managers and brewers agree that opening a mini-brewery pays off for entrepreneurs - most often they arise as part of a restaurant, where entrepreneurs use, for example, a sufficiently large unused space. Construction and commissioning takes an average of half a year and is thus an ideal solution to competition. Thanks to the mini-brewery, the company will be sufficiently different from the competing restaurants in the area, it will gain more clients and it will also attract tourists who otherwise would probably not visit the company. The competitive advantage of mini-breweries is the fact that mini-breweries are committed to traditional beer production, historical recipes and ingredients that large breweries abandoned. Brewers of small breweries have more time to brew, so the beer can go through, for example, three hop cycles. The price level of beers from small breweries is higher than the price

of beer sold in large volumes in supermarkets. Therefore, brewers can brew beer more slowly from higher quality ingredients following traditional recipes. Until the beginning of the COVID-19 pandemic, the growing popularity of mini-breweries grew not only among Czech clients but also among foreign tourists during their stay in the Czech Republic. The reason is the quality of the offered beer, but also a number of additional events aimed at tourists: excursions to mini-breweries, the possibility of tasting drinks directly in the mini-brewery, beer spa, beer gastronomy, accommodation, etc. The growing popularity of mini-breweries also copies the applied modern trends in tourism - a return to the roots, traditions, unmistakability of the region. People are looking for traditional production, a fresh taste that is very different from those commonly available from commercially processed and sold beers.

Chart 1

Factors influencing demand for beer and other services offered by microbrewery



Back in 2014, it was estimated that the number of mini-breweries would reach 200 bar (Frantík, 2014). However, the speed with which mini-breweries in

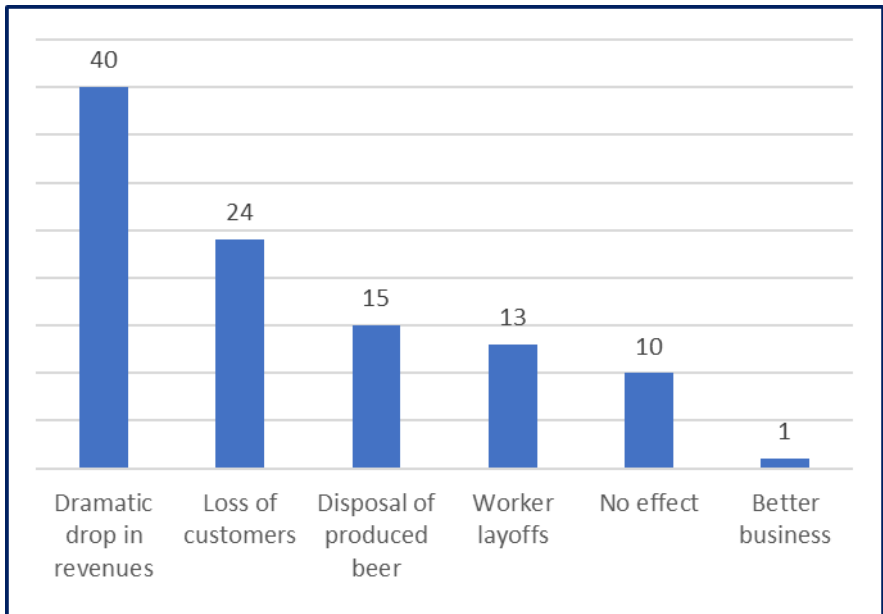
municipalities and cities of all sizes have been opening has exceeded expectations. Before the start of the covid pandemic, the number of mini-breweries was over 400. Five per cent of mini-breweries ceased operations during the covid pandemic, but quite surprisingly, at the time of the dismantling in May 2021, they announced the restart of their activities.

The results of the questionnaire survey and additional sources, especially personal and telephone inquiries, revealed the following findings: the COVID-19 pandemic had a clearly unfavourable impact on Czech microbreweries, two-thirds of microbreweries recorded a dramatic decline in profit, which was reflected in beer production itself, which the mini-breweries were forced to reduce. Employees lost their jobs, losses caused by the liquidation of already produced beer, closed restaurant premises and the number of customers fell by 40%, 5% of microbreweries operating until the beginning of the COVID-19 pandemic went bankrupt and ceased operations due to the covid crisis.

Despite these facts, 10% of microbreweries stated that they did not experience any significant impact of the COVID-19 pandemic.

Chart 2

The impact of epidemic on microbrewery business

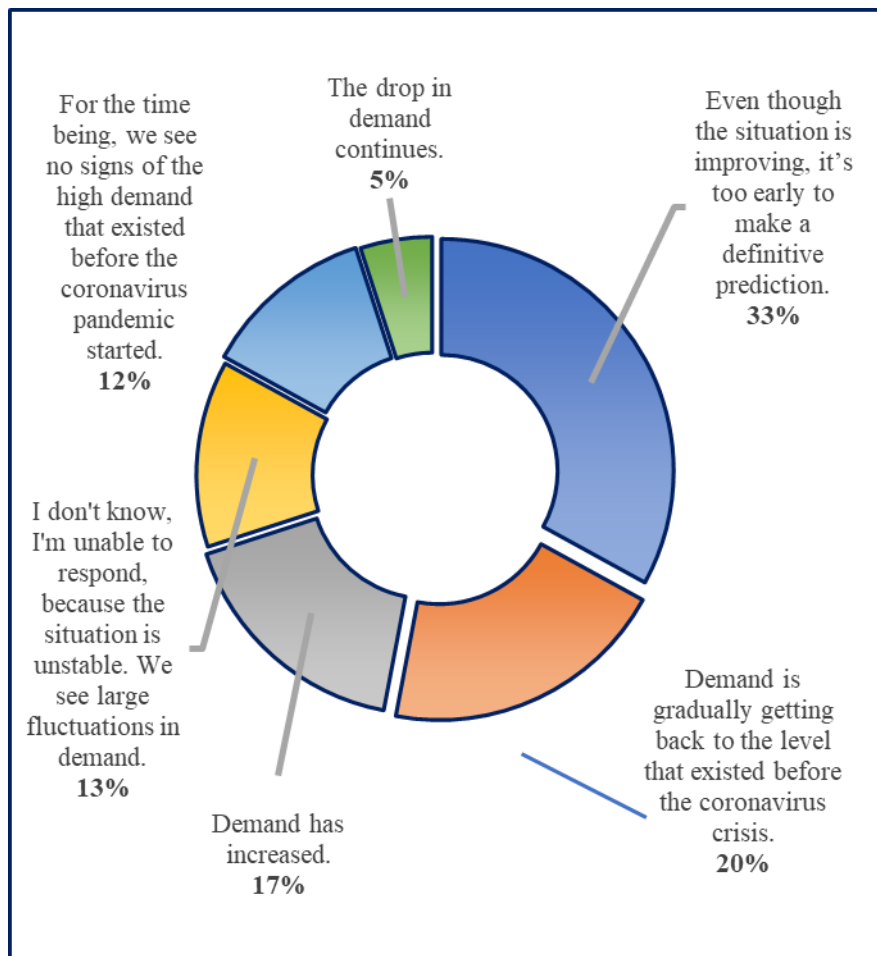


Travel is important for the existence of microbreweries, the several waves of restrictions on inbound tourism were the worst, as well as restrictions on residents' travel between districts in the spring of 2021. Minibrewery managers and owners agreed that the period from January to early May 2021 was the most

difficult. One third agreed that it was too early to assess or generalize the impact of the COVID-19 pandemic on their microbreweries.

Chart 3

Demand for beer produced by your microbrewery



Nevertheless, they began to realize the dire impact of the pandemic crisis already during government measures that closed or reduced operations and they began very quickly taking measures to revive production, sale of brewed beer, changes in the way beer gastronomy is offered. The fact that already now, at a time of the gradual dismantling of government measures, most microbreweries perceive consumer behaviour positively - demand for beer from microbreweries is gradually growing, and as microbreweries began to take protective measures almost immediately after the global pandemic of product innovation and

marketing, they assume that they will be able to restart their business, but they estimate a return to the state before the COVID-19 pandemic in two to three years at the earliest. Whether they succeed will clearly be a test of the ability of microbreweries to adapt to the crisis caused by the global COVID-19 pandemic and to show sufficient creativity. Most mini-breweries are aware of the dependence on foreign tourists, so as part of the measure they started implementing new activities in the form of preparation of beer hiking trails and bike paths, new sightseeing tours in mini-breweries, tastings and tasting separate evenings, souvenirs. Newly, most mini-breweries are considering or already preparing, for example, brewing museums, organizing entertainment and social events, demonstrations of beer brewing, for those interested in experiential training courses for brewing beer, experience courses, etc.

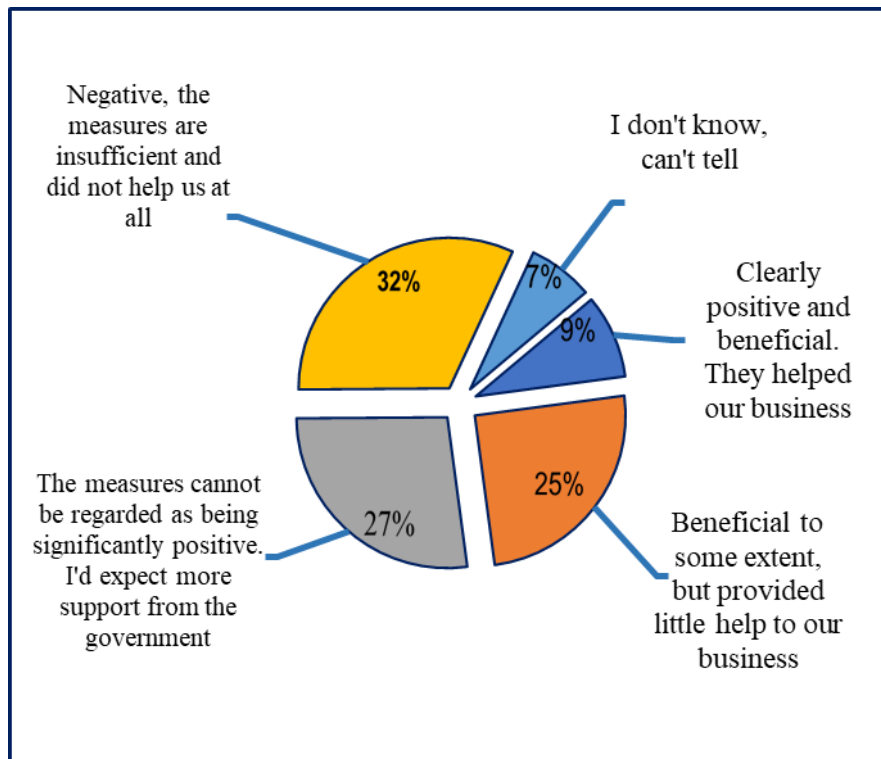
The research also indicated the possibility of cooperation that is not yet widely used, namely cooperation with the DMO or the Tourist Centers of the region in which the brewery is located. The authors see other possibilities in cooperation with the municipalities in which mini-breweries operate. Municipalities and cities are gradually welcoming the fact that breweries are reappearing, often, of course, with much smaller production. However, they offer something that, together with restaurants where beer is consumed, distinguishes them from others, *genius loci*. Something specific. And also, as expected and increasingly proving itself, the attractiveness for tourism. It is local beers that not only mean an expansion of the offer of often new, unique types of beer, but also bring with them the need to taste them elsewhere. And the travels for beer is more and more often. Mini-breweries thus become a tourist attraction, which enriches the offer of attractions and services in small municipalities and in large cities in the Czech Republic.

Another possibility for the cooperation of mini-breweries with participating entities in tourism is the cooperation with travel agencies focused on inbound tourism, experiential gastro tourism and beer tourism, educational and cultural-historical tourism. Cooperation with the CzechTourism agency seems to be realistic, which enables us to draw state subsidies and support for specific projects in domestic and foreign tourism even now. Within the proposed marketing cooperation with the CzechTourism agency, it is necessary to streamline domestic and foreign marketing projects so that mini-breweries are visible and increase the awareness of domestic and foreign tourists about specific mini-breweries in specific regions and establish regional-wide cooperation was established with mini-breweries in the basic sense of the activities of destination management, which was practically non-existent in the Czech Republic until the beginning of the COVID-19 pandemic. Increasing the awareness of tourists about the existence of mini-breweries, their products and additional activities will expand the current offer of the existing range and thus their usability in tourism. This proposal is also based on the announced changes in the promotion of the Czech Republic as a whole, which is also reflected in the forthcoming CzechTourism Strategy for 2021–2025.

The most criticism from minibreweries was directed at government measures, which were found to be insufficient, inflexible and very slow.

Chart 4

The measures the government has adopted in connection with the coronavirus pandemic



For this reason, microbreweries do not rely on government aid, there is significant dissatisfaction in this regard, and therefore other proposals aim to maintain online sales of bottled beer, which was exacerbated by the situation during the COVID-19 pandemic and proved effective. Furthermore, it is proposed by the mini-breweries to preserve the personal consumption of bottled beer, as well as beer dishes from the restaurant of a specific mini-brewery.

CONCLUSIONS

In conclusion, it can be stated that it was possible to map the current situation of Czech microbreweries based on a survey of the Czech-Moravian Association of Minibreweries, the Professional Association of Small Breweries, organized in the period from 10 September to 10 October 2020 in the form of a questionnaire survey, personal and telephone interviews with managers or directors of

minibreweries who participated in the survey. The purpose of the survey was to find out the impact of the pandemic on microbreweries, what they are doing to mitigate the negative effects, how they are assessing government measures and how they see the future in the market.

It was clearly proven that for two-thirds of microbreweries, the global pandemic COVID-19 had a negative impact on their activities, affected the number of employees, beer production, significantly reduced operations and sales of beers or beer dishes, changed business behaviour and marketing of microbreweries, changed the intended product offer after the end of restrictive government measures resulting from the ban on contact with a larger number of people and opening of establishments (shops, restaurants, mini-breweries for excursions). Given that the government's financial support programs to support entrepreneurs in restaurants and gastronomic and beer establishments rated two-thirds of mini-breweries as ineffective and were the subject of sharp criticism by respondents, most of the corresponding mini-breweries are aware of the fact that the restart of their businesses lies under their direction. Therefore, they welcomed the suggestions made in the previous part of the paper. Apart from the fact that the most important thing for the future of mini-breweries is their good reputation associated with the quality and originality of the brewed particular beer, they are fully aware that their existence is more than 75% associated with tourism. The proposals of the authors of the article are also based on this finding.

This paper provided an overview of the impact of the global COVID-19 pandemic on Czech microbreweries. It provides readers with a more detailed view of the situation of mini-breweries in the Czech Republic, the rationale for their growing number and the popularity of their role in domestic and inbound tourism. In connection with the evaluation of the survey, the authors of the article offer several proposals and solutions on how to cope with the effects of the covid epidemic, restart business and revive the activities of the surveyed breweries in cooperation with domestic and inbound tourism. Given that government restrictions on business, government support programs for private entrepreneurs, have not yet been fully completed and dismantling is still underway in the days of article completion, it is soon to draw clear conclusions. In this context, further possibilities for follow-up research are opening up. The advice and recommendations contained in the paper can thus be the subject of further discussion.

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