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Haute école de gestion
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The industry of microbreweries in the canton of Geneva

What are the current challenges faced by microbreweries in the market of Geneva and who are their customers?

**Bachelor Project submitted for the degree of
Bachelor of Science HES in International Business Management**

by

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Declaration

This Bachelor Project is submitted as part of the final examination requirements of the Haute école de gestion de Genève, for the Bachelor of Science HES-SO in International Business Management.

The student accepts the terms of the confidentiality agreement if one has been signed. The use of any conclusions or recommendations made in the Bachelor Project, with no prejudice to their value, engages neither the responsibility of the author, nor the adviser to the Bachelor Project, nor the jury members nor the HEG.

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Geneva, June 3rd 2019

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1. Executive Summary

Switzerland is the country with the highest number of breweries per capita in the world (Genillard, 2018). In 2019, the number of microbreweries is around 1000. However, it has not always been the case that Switzerland was the leading country in terms of number of microbreweries. Indeed, in 1990, there were only 32 microbreweries in Switzerland. This phenomenon is something recent and even if the number has not stopped rising since 1990, there are many microbreweries that have failed to launch their enterprise which disappeared or went bankrupt.

This bachelor project aims at identifying the diverse challenges faced by the microbrewers in the canton of Geneva. Moreover, the project also tries to build a consumer profile as well as identifying the important features of craft beers for the consumers.

There are three different challenges identified that microbrewers in the canton of Geneva encounter. The first one being the difficulty to find a production warehouse and/or selling point. Indeed, it is quite expensive and constraining for diverse reasons. The second challenge identified is the initial investment and the machinery to be able to brew. The third challenge is the access to financing. Daily management and other important matters to think about are also addressed by this report.

This report also addresses the future of the industry of microbrewery as well as the existing consortium. The future of the industry is currently difficult to forecast.

Regarding the consumer profile, the key finding was that a typical consumer profile can be drawn. There are some factors that are relevant such as gender, income, occupation and education and some other that are inconclusive such as age. Plus, many different reasons were found to understand why a person does not drink a craft beer. The percentage of people that drink craft beer was also identified. The findings show that consumers drink either often craft beers or drink it on a casual basis. The typical place where consumers drink craft beer was examined. The easiness of finding craft beer was analysed on the consumer point of view. Then, an investigation of the average amount spent by consumer was done and it seems that in average people spend up to 50 CHF per month. The features of craft beers that are important for consumers were also looked at. Plus, this report analyses if consumers living in Geneva consume mostly craft beers from Geneva or other places. Furthermore, craft beer was studied to see if this is something recently consumed in Geneva. Lastly, the favourite beers/microbreweries were identified for consumers in the market of Geneva.

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2. Introduction

This paper explores the market of microbreweries in the canton of Geneva as well as their current challenges they are facing to develop their businesses. This analyse has been done thanks to online surveys that assess the typical consumer of craft beers made by a microbrewer in the canton of Geneva. Also, another survey has been done specifically for microbrewers that address many questions regarding their enterprise and their current goals and vision. Many physical meetings with different microbrewers have been done in order to provide a better understanding and relevant data to this paper. This analysis led to find that there are 3 different main challenges faced by the microbreweries in Geneva. Regarding the typical consumer a profile has been identified, this person is most likely a male with a certain education and income that most likely consume craft beer occasionally and spent up to 50 CHF per month for a craft beer.

This result is important for at least three reasons. First, the number of Swiss microbreweries has been rising over the past three decades. Indeed, in 1990, there were only 32 breweries in Switzerland. There were more than 479 microbreweries in 2015, 794 breweries in 2017 (News, 2017), and more than a thousand in 2018 (Le matin, 2018). This makes Switzerland the country with the highest number of breweries per capita in the world. Second, the overall consumption of beer in Switzerland has been on a constant decrease for more than 2 decades. This is negatively correlated with the number of microbreweries. Third, it seems that most microbreweries are focusing on their local market and do not wish to go far from it. This appears to be due to ecological reasons as well as no current need and willingness to expand. However, is it possible for this business model to remain the same with an increasing competition arising from more microbrewers? Fourth, even if the number of microbreweries in Switzerland has been rising during the last decades, there is substantial turnover as many do not make it past the first 2 or 3 years (Corset, 2014).

Answering is challenging because there is little or no data available on the internet that covers this topic. Therefore, the need for two different surveys was strong. However, obtaining a number of answers that was appropriate to write this report still wasn't easy. Indeed, there was the need to go in bars and ask the manager if it was possible to provide surveys to their customers. Most of them refused. Regarding the microbrewers side, the survey was sent through email to them. However, most of them responded that they refuse to answer to the survey. Therefore, I went to many microbreweries to meet face to face the microbrewer, in order to answer the many questions that were addressed in

this report. The third challenge faced was to extract consistent information from the data gathered from the consumer survey. The software “Stata” was used to do so. This software is not that straightforward for new users. Many questions to a teacher from HEG were needed in order to run this analysis.

It seems that this paper is the first of its kind to analyze the problem faced by microbrewers from Geneva to develop their business and also make an analyze of the typical consumers. Some other research papers were done to analyze the beer industry in general with some specific aspects in Switzerland such as the paper “Imagerie de la bière, entre imagerie et identité” written by (Bathija, 2017).

What is a microbrewery?

As the term “micro” lets suggest, a microbrewery is an enterprise that is smaller than a brewery. A well-known brewery like Heineken, Becks or MillerCoors in the US produce millions of Hectolitres per year. On the contrary, a microbrewery is limited in terms of production of beers. Those regulations differ through countries but in Switzerland the maximal amount is 15'000 HL per year (Hop Head, 2015).

Microbreweries are primarily known for their wide variety of “specialty beers”. This type of enterprise is typically a small-batch boutique beer, which might produce only for a certain season. Microbrewers are usually passionate people that love to experiment different types of beers with different ingredients proportion or different fermentations processes (Hop Head, 2015). The beers made by a microbrewery are named, “craft beer” which means that they are done in an artisanal way (Brewers Association, 2019).

Normally, a microbrewery is a company with limited resources with a relatively simple business model. Those enterprises are, most of the time, meant to remain for local consumption very tied with its consumers.

When a microbrewery gets popular and successful, they are sometimes acquired by bigger companies or beer's group such as Heineken. When this situation happens, they lose their microbrewery classification.

As microbreweries are very small, they do not have many options for becoming known to the public. Most microbreweries have a tasting room. If they are ambitious and have the possibility, they are attached to a “brew pub”, a pub that's attached to the brewery, so the owner can get known and sell their craft beers. Many microbreweries are also highly involved in festivals or special events.

In brief, microbreweries are enterprises lead by passionate entrepreneurs who aim to create craft beers that have more character than regular breweries or mainstream beers. Therefore, big brewers such as Heineken do not believe that microbrewers are a valid competitor. From the big firms' perspective, microbrewers are often seen as an insignificant or negligible competitor that indirectly benefit big brewers (Jones, 2018).

A brief history

The word “microbrewery” was first used in the United Kingdom in the 1970s. Although this microbrewing movement happened in the UK, traditional artisanal brewing existed in Europe for centuries which led to spread firstly in the UK. In France and in Belgium they were places where craft beers were produced since many centuries (Amstein, 2019). The best example as explained before, would be trappiest monks¹.

As the movement grew in the UK, some breweries expanded their production and distribution. Some new concepts also emerged, such as brewpub (a pub where the its own beer is sold).

Later, in the 1980s, this microbrewery movement expanded into the US. Since this moment, the term became popular. Indeed, in the US by early 1980s, there was only light lager in bars, and imported beer from other countries was not common at the time. An interesting fact is that there were only 8 breweries in the US in 1980 (Brewers association, 2019).

Due to the lack of beer diversity, many entrepreneurs had the idea to create their own microbrewery.

Even though the lack of breweries at the time, the microbreweries and brewpubs of the 1980s struggled to establish the foundation for what was to become the proliferation of craft beer in America.

This decade is the one of microbrewing pioneers. Interestingly, at that time industry experts from big breweries in the US refused to recognize the existence of microbreweries as anything serious. Those pioneers’ companies emerged with their passion and vision, to serve their local communities a different taste of flavoured beer and with an old-world European tradition. This became later a uniquely American character. By 1994 there were 537 craft brewers in the US for 263 million of inhabitants (Brewers association, 2019). They are now 6000 in 2018 for 327 million of inhabitants in the US (Worldometers, 2019).

To compare, in Switzerland, such a movement arrived much later. In 1990, there were only 32 breweries in the country. However, the market reacted to this lack of diversity in the late 1990s. The first microbrewers that entered the market in Switzerland were “Les

¹ A beer “trappiest” is a beer that can only come from 11 different abbeys and all of those abbeys must have been validated by the Vatican as it is linked to the Roman Catholic contemplative religious order, a special order linked to the catholic religion which follow the rules of saint Benedict (Ordre Cistercien de la Stricte Observance: OCSO , 2019).

brasseurs” and “la brasserie des franchises montagnées” and Calvinus. Later some other came to the market (Docteur Gab’s). Most of them are today breweries of a substantial size that cannot be defined as microbreweries.

However, the swiss market was and remains an oligopoly. Indeed, 2 major group, Carlsberg and Heineken have 95% of the beer market in Switzerland. However, they only provide 5% of the variety of products. Moreover, currently people in Switzerland are drinking less beer every year. The consumption of beer per capita in Switzerland is the lowest ever today (around 54 litres). It hasn’t stopped decreasing since the end of the second world war. Therefore, the rise in number of microbreweries appears even more surprising.

As the number of breweries in Switzerland is rising, the confederation saw a need to create regulation that enable this market to expand even more. The 6 October 2006 the “Loi fédérale sur l’imposition de la bière” was created. Microbrewers argues that this law was written in a way to enable the all microbrewery industry to flourish (le conseil fédérale - confédération suisse, 2019). This tax is for any beer produced in Switzerland, which depends of the degree plato². Up to 10 degree plato the tax is 16.88 CHF per Hectolitre. From 10.1 degree plato to 14, the tax is 25.32 CHF per hectolitre and above 14 degree, the tax is 33.76CHF per hectolitres (le conseil fédérale - confédération suisse, 2019). However, the tax rate is not the same for big or small beer production. If a microbrewery does not produce more than 15’000 HL per year, the microbrewer must only pay 60% of the tax.

² The “Plato scale” is a scale used to measure the density of beer in percentage and by weight. The higher the number is the more you will pay for a beer (Beer advocate, 2004)

How important is the beer industry in Switzerland?

The beer industry is a significant industry in Switzerland, and it brings many different benefits such as jobs and non-negligible amount of money to the country.

First of all, according to the Swiss breweries federation, in 2017 the Swiss beer industry, as a whole has contributed to the Swiss economy for 2.5 billion CHF. (Brewers of Europe, 2019) It represents approximately 0.3% of the total GDP of Switzerland. Only through tax, the Swiss confederation has collected approximately 915 million CHF. From those 2.5 billion generated, 63% was made thanks to the hospitality sector (hotels, bars, etc.), 18% was made directly through brewing companies, 11% was made through the retail sector. (Brewers of Europe, 2019).

In 2017, there were 869 active breweries listed which employ directly 2900 people and created indirectly 44'797 jobs (Brewers of Europe, 2019).³

The same year, the production of beer in hectolitre accounted for 3'464'000. Interestingly, the consumption in HL of Swiss citizens is greater than the internal production with 4'623'000 HL consumed in 2017. In 2017, 1'074'000 HL were imported from the European Union and 85'000 HL from outside the EU. It appears that Switzerland does not export much with only 50'000 HL sold abroad.

Swiss citizens tend to consume 40% of the total beers consumed in bars or restaurants and 60% from grocery or from independent retailer.

Thanks to those data, it is possible to conclude that the beer industry has a certain importance for the Swiss society. Since 2017, the number of breweries in Switzerland has risen and went above 1000. Therefore, even lacking recent figures it is fair to imply that the importance of the beer industry has risen (Le matin, 2018).

³ Indirect jobs are those jobs that are projected to be created at other businesses that supply the project business with inputs such as goods or services required by the project business as a result of the financing. (Defined terms, 2019)

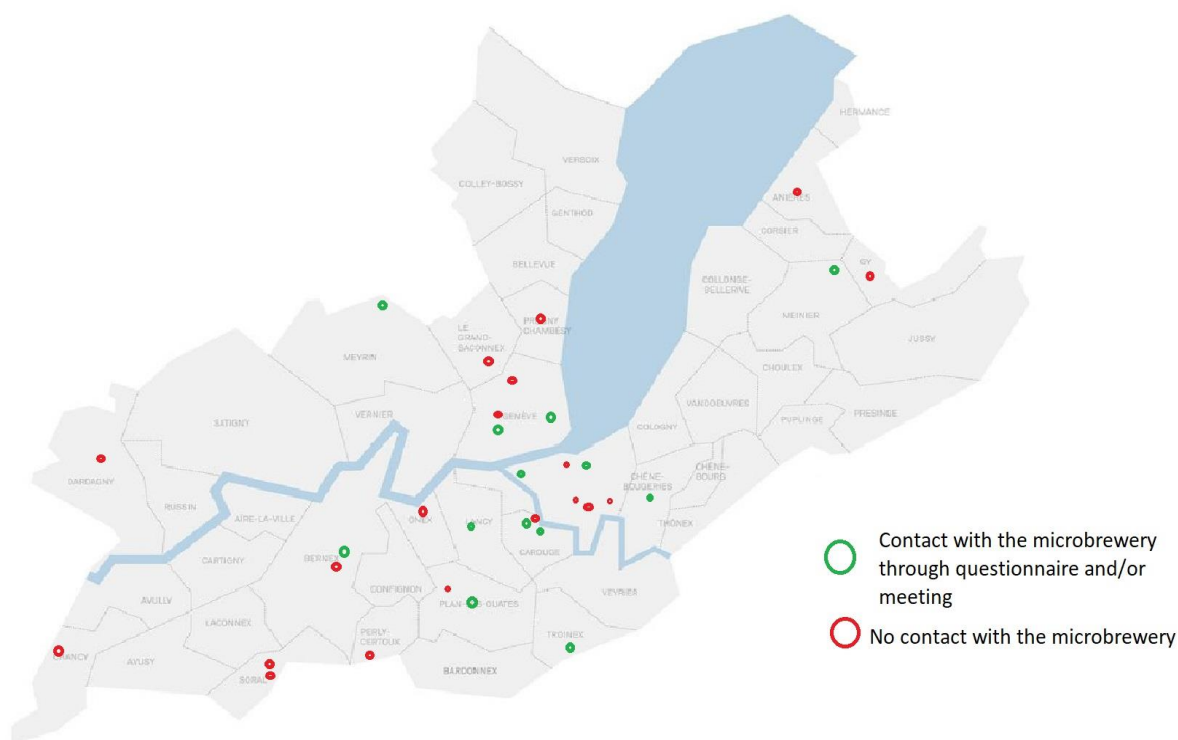
3. Analysis of the market of Geneva and its challenges

Introduction to the questionnaires

As previously explained, two different questionnaires have been conducted in order to obtain the necessary data for this paper. The first questionnaire was answered online, and the goal of this questionnaire was to be able to give a clear profile of the consumers of craft beers made by microbreweries in Geneva. This questionnaire asks some question about the personal information of the person such as age, gender, income, etc. and then goes deeper into consumption of craft beer. Typical questions were the following: if a person has drunk a craft beer into the past six month or not, how much a person spend for craft beers per month, how often they consume craft beer, etc. There are many other questions. This questionnaire can be found in the appendix.

The second questionnaire was done online and on the field. The goal of this questionnaire was to understand better the industry in general of microbreweries in Geneva but also to identify the challenges to launch and operate their business. The questionnaire was sent to most of the microbreweries in Geneva. However, very few answered to it online. The need to go and meet face to face some microbrewers appeared. The kind of question asked to the microbrewers that were met are more or less the same that the one on the online questionnaire. Typical questions are: How much HL they produce each year, how many different beers they sell permanently, what kind of distribution channel they use the most and which one is the most profitable, how long they have been searching for a production local, how much cost their warehouse production per month, what is the initial investment for the machine, etc. This questionnaire can also be found in the appendix. The time spent at each of the microbrewery varies from 30 minutes to 3 hours, depending on the availability of the microbrewer. The 3 microbrewery that answer to the online questionnaire are the following: Brasserie du virage, Totally Beer Sarl and Brasserie des murailles Sarl. The other microbreweries were a meeting with the owner happened are the following: Brasserie des murailles, Bière du lac, Brasserie Glouglou, Brasserie Chien Bleu, Brasserie de l'apaisée, Les brasseurs, la brasserie du Molard, Brasserie des tours, brasserie de la pièce, brasserie les barbus and brasserie la cave. Moreover, a first quick meeting has occurred through a festival of the microbrewers part of the "ABIG". From each of those microbreweries most of the questions of the questionnaire were answered. Thanks to the discussions and the answers of the questions, some fact about the microbreweries industry have been found as well as many challenges.

Figure 1 - Map of the microbreweries in Geneva



Source: (Bières-artisanales, 2019)

Craft beer from microbreweries stay a local product

After having done a careful analysis of the craft beer from the Geneva, it appears that it is quite difficult to find craft beers produced by a microbrewery of another canton in Geneva. Indeed, there is only two craft beers produced by microbrewers from the canton of Vaud that we can find easily in Geneva. Those are Docteur Gab's from Lausanne and Captain Mousse from Nyon. Docteur Gab's is easily found in grocery shop such as Coop. Regarding DR Mousse, the proximity of the brewery to the Canton of Geneva makes it easier to find in place such as bars and restaurants in the city of Versoix.

From Geneva, it appears that except "Chien Bleu" none of the microbrewers are willing to distribute their beer in other cantons. Several reasons can explain this.

Firstly, many microbrewers are not interested selling outside Geneva. Indeed, many microbrewers have the willingness to stay local and small. Being small looks to be more convenient and the mindset of microbrewers is also very oriented toward ecology. Going to another market also means long-distance delivery with trucks which is seen as

something that is not ecological. Many microbrewers give up this idea for ecological reasons. This reason appeared many times through the interviews.

Small enterprise often pursues an ideal which goes further than just being profitable. For many microbreweries it can be summarised as: giving quality beer to the neighbourhood. Undeniably, many microbrewers have said through the interview that the close community around them is more important than the ones that they don't know. In other words, being a microbrewer is mostly being passionate about your job and, in a way, transfer this passion to their customers.

The second reason for staying local is the small production capacity. Many microbrewers do not even meet the need of the local demand. It is the case of the microbrewery "Glouglou", "Bière du lac" or "Les Barbus" that must brew as much beer as possible with their existing machinery.

The third and last identify reason is also the fact that microbrewers know the local market, their needs but might also lack knowledge past their current market boundaries. Indeed, the market research is quite time consuming. To which restaurant they should propose a deal, or to which local event they might try to sell some casks? Unfortunately, those questions remain currently unanswered. If the local market needs are not satisfied, why trying to compete into someone else market?

First major challenge – the production local and sell point.

Thanks to questionnaire build in order to understand the diverse major issues faced by microbrewers and many meeting and dialogues with different microbrewers, three important factors limiting expansion have been identified. It appears that the production warehouse and/or selling point is difficult to find in the canton of Geneva.

There are some microbrewers that have been unable to launch their microbrewery seriously due to the fact of not finding an appropriate warehouse to brew their beer. The microbrewery of L'Apaisée has been looking for a local which enable the enterprise to have enough room for brewing and selling its beers into the same place for more than 2 years. The major issue was the cost of renting. For some microbrewers rent represents a subsequent or even major part of their cost. For example, the cost of the rent (located in Carouge) for the microbrewery L'Apaisée is a bit more than 5'200chf per month which represents the highest fix cost of the enterprise.

Plus, the state of Geneva has set some special requirements to the production warehouse that need to respect some criteria such as drainage grid and humidity. This makes it even harder to find. It is important to mention that those requirements are slightly different for each canton but remain strict at the confederation level.

It also appears that there are 2 different kinds of difficulties for finding a place to produce and to sell. M. Andersen owner of the microbrewery Glouglou, stated that microbrewers in the city of Geneva face more difficulties to find a warehouse than the one in the countryside of Geneva. Such warehouse must be quite spacious. The machine to produce beer are space consuming and extra room is also needed in order to store the casks and/or the beer bottles. It is also highly advised to have a bar inside of the local to be able to sell directly to the consumers. He reported that most of the time, in the countryside an entrepreneur that wants to launch its microbrewery will be more easily accepted in the neighbourhood. Certainly, it is easier to bring a new business into a small village as it will bring more "life" or "ambience" and local inhabitants see it as an opportunity. Moreover, in small villages in the countryside, everybody knows each other. If a person within the village knows the entrepreneurs, it is going to be much easier for him to settle in. Furthermore, according to the owner of the microbrewery "Glouglou", it is not rare that the authorities such as the mayor provide financial support to its entrepreneurs. In his opinion, it was the case in Soral, with the microbrewery "Père Jakob" and also with the "Bière du lac" in Confignon. Another advantage of choosing the countryside is that for the same size of warehouse, the rent will be much lower than in the city centre.

In contrast, it seems that finding a local in the city centre is much more difficult. According to M. Andersen, most of the time, the neighbourhood is not happy to have microbrewery nearby. The reason is simple, a microbrewery close from where you live is seen as a potential noise disturbance and bring more people into the neighbourhood which will harm its harmony. Having a microbrewery with a brewpub or a terrasse will potentially bring more people and animate the neighbourhood which was previously calm. To summarise, it seems that there are 2 different mentalities between the city centre and the countryside regarding the opinion of a microbrewery into the neighbourhood. Those facts are based on M. Andersen's opinion.

It is also important to mention that each microbrewer was not equal when they wanted to launch their business. Indeed, microbrewers that lives in the countryside and had a job which was in the agricultural field had some existing facilities such as warehouses that belong to them. It is the case for "La brasserie des Murailles" and "Père Jakob" who already had an existing warehouse that they have transformed in warehouse for beer production.

Microbrewers in the city centre rarely had an existing warehouse or production place which was able to be transformed to launch their enterprise.

Second challenge – machines and initial investment

Appropriate machines and material is necessary in order to be able to produce a beer with a consistent taste and quality. The problem is that this initial investment is directly impacting the production capacity of the microbrewery. Indeed, should a microbrewer purchases machines and material that will makes him able to produce 100HL per month or 1'000HL per month? This is a personal choice. However, once the investment made, it is quite difficult to realise that it was not enough or that it was an unnecessary investment.

After having figured out how much the microbrewers wants to produce per month, the question of how much it cost also need to be addressed.

It is important to have a clear idea of the initial investment for the machines and materials such as fermentation tanks, brew, fermenter etc. The brasserie “Glouglou” launched in 2016, with a current annual production of 150HL per year and has no full-time employee except the owner of the enterprise. The investment regarding the machines and equipment was around 150'000 to 200'000 CHF. However, there is currently the willingness of this microbrewery to expand and increase its annual production capacity. As the enterprise needs new machines and material that are space consuming, there might be the need of changing their local and having higher rent costs.

If we compare those figures with another microbrewery that produce a higher amount of HL per year such as “Brasserie des Murailles” with 3800 HL. This microbrewery has recently done a huge investment for some production tanks as well as storage tanks to increase their production quantity. Their investment was 1'100'000 CHF. This is a consequent investment. This microbrewery is fortunate because they have enough room into their production local in order not to need to get another one or to change it.

Due to those enormous initial investment to be able to produce craft beer or increase the current production of craft beer, the question of how they get finance must also be asked. To sum up, the investment for the machinery is not linear, there are some stages at which you cannot produce more and need huge investment to be able to increase your capacity.

Third challenge - The access to financing

The financing strategy might vary a lot between each microbrewery, depending of the initial size wanted or also the wealth/assets of the different entrepreneurs.

However, a clear pattern can be identified for each size of microbrewery.

Microbreweries that want to start small or relatively small, will most of the time use their own sources of financing. Most of the time it is a passionate that is brewing beer at home in its kitchen and has another job. This entrepreneur will get its own capita or from relative for starting the microbrewery. Bank might also be a finance solution for extra capital. This was not possible decades ago, as banks were reluctant to lend money as they did not know that this business model was successful.

Microbreweries that want to start with a consequent level of production will need to obtain more capital in order to purchase equipment and machines that enable them to do so. The price of adapted equipment is substantial. Some different source of finance is needed. Most of those entrepreneurs who have chosen this riskier strategy will ask a credit to a bank. This is the easiest and somehow unique possibility. Indeed, even with some equity brought by the entrepreneur, it is most likely that a need of money will still be required.

Recently some microbreweries have chosen a totally new and different way of getting financed, crowdfunding. This strategy or practice of funding a project or venture by raising money from a large number of people who each contribute a relatively small amount, typically via the Internet. In other words, an entrepreneur get finance by other normal people that believe his business is a good idea and they invest money in exchange of either, a part of the company or a service provided by the company. This is the financing strategy of the microbrewery "Chien bleu" in Geneva. Their objective was to obtain 20'000 CHF through this crowdfunding platform they created. They have today exceeded this objective and still get finance through this platform. In exchange of a sum of money, the person who has financed the brewery will obtain some kind of reward or services.⁴

⁴ For example, with 200 CHF invested, the person will receive 12 beers a year for the rest of its life. If another person invests 1'500chf, the investor will be able to have a party within the microbrewery with up to 15 persons, have an illimited access to beer during that party and have to right of vote on every new beer the microbrewery will try to commercialise. Those package goes up until different packages to the value of 10'000chf (package ambassador) which still today no one has use

This finance practise of crowdfunding works and has helped the microbrewery “Chien bleu” to reach its objective of 20'000 CHF. More recently, another microbrewery (les Barbus) has used crowdfunding to obtain financing with an objective of 30'000 CHF which they obtained in less than 45 days. The result seems successful.

To summarise, getting financed is a challenge for microbrewers. Their Initial finance strategy will determine for at least for the short term, their production capacity and indirectly the pace at which their business will develop.

Daily business and important matters while being in the beer industry

The daily business while running a microbrewery is also not to underestimate. There are many aspects to take into consideration.

Many microbrewers started small or even at an amateurism stage. it is quite easy to do a small mistake within the process and makes the beer unable to be consumed it is due to poor taste or dangerous consumption due to some bacteria. However, to be able to sell its product a microbrewer must be able to provide a consistent and tasteful craft beer to its customers. Some microbrewers have learnt from professionals such as “Maitre brasseurs” from other regions or even countries. It is the case of the “Brasserie des Murailles”. Nathalie Droz, microbrewers from the “Brasserie des Murailles” said that the key to obtain a consistent beer is hours of practices, failures, but most importantly appropriate material. She also said that even by being the best “maitre brasseur” of the world, it is still possible to fail to obtain a consistent beer due to human mistakes. Learning the job of a microbrewers is a long process and can be more difficult than expected.

Managing beer production and its cost is also important in the day to day business. In the microbrewing industry, finding some suppliers that provide a good quality goods such as malt, wheat, hops, yeast, etc. is not that complicated as there are many suppliers. But the difficulty arises later. Certainly, each time a microbrewer wants to make a brew, he needs large quantity of all those raw materials. It cost them a lot of money in advance, which means to be careful with the cashflows. It will depend on the quantity the microbrewer wants to make, but on average only the cost of raw material is around 250chf per brew of 500L. Managing liquidities is crucial in the day to day business as there are other expenses to think about such as salaries, distribution cost, etc. M. Andersen, owner of the microbrewery “Glouglou”, says that it must think twice about each end of month when exactly he needs to brew. He said that it is really important to always keep enough money for he’s own expenses to live, and the fix expenses such as

the cost of the rent of its apartment and also the cost of the production local. Sometimes he waits to create craft beer due to short in liquidity.

Human resource management is also key for the success of a microbrewery in its day to day business. Developing its enterprise should always be the main priority of the owner. However, every entrepreneur has thousand tasks to do and to think about. Some entrepreneurs forget to find solution about making their company growing. It was the case of Michel Wagner, owner and brewer of the microbrewery “Bière du lac”. Indeed, he always wanted its brewery to growth at a reasonable pace. He was doing most of the work alone and realised that it was too much for one person to be able to focus to do the daily task as well as developing the enterprise. As a result, he took some part times employees that he taught precisely how to help him with the daily tasks such as cleaning a cask, preparing the bar to receive customers or even to help him at the bar. By doing so, he was able to refocus on his priority, develop its company. Today the microbrewery “bière du lac” employs 7 pers at part time which represent 1 person at 70%. It represents only 2 or 3 hours of work for one person per day. Thanks to this precious help of key employees, the enterprise has realised a 20% growth in one year. However, Michel Wagner realised that this help has a cost. Indeed, thanks to the help of the employee he was able to focus on developing its enterprise. However, the employment cost such as the salary and the taxes such as AVS etc, took the major part of its benefit from growth. “Key employees that you trust are essential to growth; however, this has a cost that many entrepreneurs underestimate. In the end, the benefice from the growth that your company has achieved is highly impacted by the payroll”; says Michel Wagner.

Lastly, it is important for a microbrewer to be able to sell those products rapidly in order to finally obtain a benefit. Many microbrewers have at their own production warehouse or close by a bar at which they sell their product. However, it may be possible that it does not suffice to sell all production. Therefore, it becomes crucial for microbrewers to find other distribution channels that sell their beers. Most of the time, they use restaurants or bars nearby the area they produce beers. It appears that in Geneva it is quite simple to find a restaurant or a bar willing to sell the craft beers of microbreweries. Having a great distribution channel and maintaining it is crucial for survival and growing. Selling through restaurants or bar is not the most profitable for a microbrewery as they are selling their beer at a lower margin to them in order for the restaurants or the bar to still obtain a profit. However, it does provide the advantage of selling the production of their recent beer quickly. Microbrewery that have a higher production capacity also try to distribute their beers through local grocery stores such as Coop. It is the case for “La brasserie des Murailles”. Local events such as fairs, village party or even private party are also a

great source of revenue for small microbreweries. A large quantity of beer is demanded in a short period of time. In this situation, casks are widely used to obtain immediate revenue but at a lower margin as bottle are usually more profitable.

4. Future of the industry and existing consortium

ABIG

The association ABIG (Association des Brasseries Indépendants de Genève) was created in 2018. The founders' member were 5 microbreweries: Brasserie du virage, l'Apaisée, les Murailles, Père Jakob, and La Pièce. 3 other members (Bière du niton, bière du lac, Brasserie Glouglou) joined this association right after the first meeting session. More recently, the microbrewery "les Barbus" has entered the association (Geneva beer - bières artisanales de Genève, 2018). Those 9 microbrewers are today key players in the market of Geneva.

The goal of this association is to defend and promote the interest of the microbrewers of Geneva, to promote their product in Switzerland and elsewhere, to encourage beer production, distribution and local consumption and lastly to support and develop the creation of local raw materials to be able to produce beer with it (Geneva beer - bières artisanales de Genève, 2018).

ABIG supports professional microbrewers that produce approximately 150HL per years or more and that are at least microbrewers as a principal occupation. In other words, it is not possible for an entrepreneur part of a big group to come in and also for breweries that only put an etiquette on beer produced by someone else (Chien bleu, Minuscule).

To sum up, the goal of this association is to share resources and work together to develop their business in Switzerland, but you need to fill the requirement as a microbrewery to enter this association.

ABAG

The association ABAG (Association les Brasseurs Artisans de Genève) has a similar concept but is much more focused on amateurs. Anyone that has interest in the microbrewery industry can enter this association. It is mostly used for advices and sharing knowledge and resources.

Indeed, ABAG is a non-lucrative association whose goal is to promote craft beer in the area of Geneva. This goal is reached through many different events which promote craft beers, promote discussions about craft beers and also permits its members to use the machineries and the material of brewers in Geneva. This association brings together well establish brewers but also smaller enterprises or even people that are amateurs and passionates of beers (Association des Brasseurs Artisans de Genève, 2019).

The events organised by the association are for example the “festibière de Genève” which happen every year in middle of June. At this event, there are 150 different craft beers from many different microbrewers that promote their products.

Interestingly, ABAG is promoting craft beers and microbreweries in the canton of Geneva. This is beneficial for ABIG and any independent microbrewers in Geneva.

To sum up, this association is more tied to amateurs that want to share resources, knowledge and promote craft beer. Anyone can enter, there are no specific requirements except passion for craft beer (Association des Brasseurs Artisans de Genève, 2019).

Opinion of the microbrewers about the potential entrance of other microbrewery into the market of Geneva

The question relating if there is still some room for microbrewers in the canton of Geneva was asked. Most of the answers were the same. Microbrewers of Geneva believe that there is still some room for newcomers. Indeed, they believe that the demand for products such as craft beer is still large enough to permit some new microbrewers in the market.

However, some of them believe that the window for entering the market of microbrewery in Geneva will last only for a short period of time. It is the case of Michel Wagner owner of the microbrewery “Bière du lac”. He believes that in few years the existing microbrewery will increase their production capacity and will be able to cover the market of Geneva. Moreover, he said that some communes are already well distributed with well-established microbreweries.

Interestingly, the existing microbrewers are not really worried about the new microbreweries opening in the market of Geneva. They do not believe that it will have an impact on their revenue as most of them respond to a local demand with loyal consumers. Rather, they believe that competition is currently good for their business as the market of Geneva as created some association (Abig & Abag) that permits microbreweries to work together instead that working against each other.

5. Analyse of the Consumer profile

There was a questionnaire surveyed online which goal is to understand the consumer profile of microbreweries of Geneva. The goal of drawing a consumer profile is for a microbrewery to understand what their consumers look like. They can then focus on the segment of people they want to obtain within their market and what kind of potential consumer they are currently lacking.

The typical characteristics the analysis look at are what explain the fact that a person drinks a craft beer or not. This analysis also looks at what explains that a person does not drink craft beer. For the people that do drink craft beer, how often do they drink it and where. This paper also address how hard is it in the consumer point of view to find craft beer on the market. Also, how much a consumer is spending per month for craft beers and how much more is the typical consumer willing to spend more than a mainstream beer. The features that are important for consuming a craft beer will also be analysed. Then the fact of from where people living in the area of Geneva drink craft beer and to what proportion will be addressed. Finally, this paper will try to see if consumers do drink craft beer since a long time or if it is a recent phenomenon.

Data

There were 146 different people who answered this survey. There were 68 women 79 male from 17 years old to 74 years old with an average age of 29 years old. In order to be the most accurate possible, this survey tried to take as many different persons as possible from different generations and different social classes. 69% of the people who answered the survey earn 75'000 CHF annually or less, but some people earn more than 150'000 CHF. Many people with different achieved education level from answered this survey which goes from "Cycle d'orientation" to "PHD". The most common highest level of education is "Maturité/CFC" with 70% of the answers. There are people with diverse occupation as being student or currently employed and even retired. Most of the people that answered the survey are people that are currently student with 48% of the answers and currently working with 40% of the answers.

Who consume a craft beer? Who does not consume a craft beer?

This section of the paper will analyse the profile of person that consume a craft beer, and who does not consume a craft beer.

What variable does explain consumption of craft beer?

Table 1 – What parameter is important?

Criteria	1	2	3	4	5
Ln(age)	-0.1648504				-0.415722
Gender		-0.8152171*			-0.8836093*
Education			0.3348472*		0.447722*
Ln(income)				0.2421211*	0.2654048

* means that it is significant, and that null hypothesis can be excluded

In the table above, the coefficient with the “*” are the ones that do have some significant influence on the consumption of beer. The goal of this table is to see what criteria are important to explain if a person does consume a craft beer or not. Each criterion has been used on a software called “Stata” to see if it was relevant to explain if people do drink craft beer. In other words, each criterion has been compared thanks to the probit analysis, which operates like multiple regression with dependent or response variables that are binary.

Once each criterion has been compared individually to see if it was relevant to explain the consumption of craft beer of people, there were compared all together to see if it changes the importance of each criterion and its coefficient.

Is gender a relevant criterion?

According the data gathered thanks to the survey, it appears that craft beer tend to be consumed more often by men than women. 147 people answer the survey, there were 79 males and 82% of them have drunk beers in the past 6 months. On the women side, within the 68 women that answered the survey, only 31 drink craft beer and 37 do not. In other words, only 45% of women drink craft beer. The difference between the 2 gender is quite consequent. It is certainly linked to the image of such a beverage. According to other research papers, beer is perceived as a masculine drink (Eads, 2015). To conclude about gender, it is quite clear that beer is drunk more often by men than women.

Is age a relevant criterion?

In the table above, it seems that age is not relevant to explain whether people drink craft beer or not. It seems that age cannot explain if people drink beer or not in the past six months. The null hypothesis cannot be excluded due to the poor prob > chi2 model.

Is income a relevant criterion?

It seems that income has an impact in the explanation if someone has drunk a craft beer in the past 6 months. Not surprisingly, the coefficient is positive, so it means higher the

income, the more you drink craft beer. But income is only relevant when it is alone in the model. As a result, it is not sure whether this is a relevant criterion

Is education level a relevant criterion?

It seems that the education level has a positive correlation with the fact that people drink craft beers. The coefficient is positive, which means that the more educated a person is, the more this person will be likely to drink a craft beer.

Is the occupation a relevant criterion?

Table 2 - What about occupation ?

	coef	P>(z)
occupation	0.2017728	0.022
cons	0.109847	0.581

The criterion occupation is about what the person is currently doing. As described below the survey contained 6 different predefined answers. The occupation seems to have an impact on the consumption of craft beer. Indeed, the prob > chi2 is relevant and the null hypothesis can be excluded.

Table 3 - Occupation in detail

Occupation	Frequency	Drink Frequency	Frequency Drink in %	Don't drink Frequency	Frequency Don't drink in %
Student	72	47	65%	25	35%
Employed	39	25	64%	14	36%
Currently unemployed	4	3	75%	1	25%
Student and employed	22	17	77%	5	23%
Retired	2	2	100%	0	0%
Other	8	8	100%	0	0%

When looked in details, it seems that the occupation category that drink the most in percentage are retired and other. However, as very few people are among this category it is not possible to extract any conclusion from it. Student and employed arrives 3rd followed closely by currently unemployed.

To conclude, if the profile of a person that drinks a craft beer is created, it would the most likely be as follow. The person would be a male, the age is not important even if it must be at least 16 years old. This person will most likely be a student with a job to have enough money to pay for craft beers.

Why don't people drink craft beer?

In the survey, if someone answered “No” to the question: “Have you drunk a craft beer within the past 6 months”, then it automatically went to a question which tries to understand why they did not. This question was: “Select the principal reason for which you did not drink craft beer in the last 6 months?”.

There were 6 possible different answers being: I don't like beer, I did not know such a product exist, it's too expensive, I prefer mainstream beer, I don't know where I can buy it, I believe it is overrated, I do not drink alcoholic beverages.

Table 4 - Reason why a person does not drink craft beers

Principal reasons why a person does not drink craft beers		
Reason	Frequency	Percent
I don't like beer in general	23	52%
I don't know where I can purchase some	10	22%
I don't drink alcoholic beverages	7	15%
I prefer mainstream beers	3	7%
It's too expensive	1	2%
I don't know that such product exists	1	2%
Total	45	100%

From these questions it appears that most people simply do not like drinking beer. 52% of the 45 people answered this question. This answer is quite subjective as it is related to taste and therefore no real outcome can be taken from this answer. However, as a craft beer is vastly different than a mainstream beer, it might be possible to catch few consumers that did not really tried a craft beer yet.

Interestingly, the second most answered question is that people do not know where to find it (22% of the answers). It is quite the opposite result of the same questions asked to people who do drink craft beer. Therefore, there might be a problem of easiness or convenience to find such a product in day to day life. It may be related to the distribution strategy chosen by microbrewers. There might be a possibility for microbrewers to improve that and capture potential customers might become real ones. This answer is directly related to the next part of this report (How hard is it to find a craft beer in Geneva?).

Another answer that is subjective or related to the person personal choice is the answer “I do not drink alcoholic beverages. There is not much a microbrewer can do about that. This is about personal choice and conviction. It will depend of a person's belief, religion or education. It is hard to change such a belief and there is no need to focus on such consumers.

The other answers are not significant as very few people answered them.

To conclude, there is little a microbrewer can do about a huge part of the non-craft beer drinker that either do not like beer so far or do not drink any alcoholic beverage. This part represents 74% of the answers. An improvement of the availability of craft beer on the market or easiness to find such a product might have some positive outcome to increase their sales. The pricing appears to be a little problem regarding consumption.

How often do people consume craft beer?

The frequency at which people drink beer is quite important for the beer industry. They need to sell most of their products in order to survive.

Among the people who answered the questions whether they have drunk craft beer within the past 6 months, it is interesting to see at what frequency they do drink craft beer.⁵

Table 5 - Frequency of consumption

At what frequency people consume craft beers		
Answer	Frequency	Percent
Occasionally	38	37%
Once per month	25	24%
Once every 2 weeks	19	18%
Once per week	13	13%
More than 3 times per week	4	4%
When I get the chance	3	3%
Total	102	100%

Result shows that most people who have consumed craft beer within the past 6 months do it occasionally (37%) or when I get the chance (3%). This result might explain some aspects about the perception of craft beer for people. As a majority consume craft beer occasionally, it might describe the product as something that satisfy a recreational need for consumer. It may be easily substitute by another close product such as mainstream beer or other alcohol. However, the word “occasionally” is vague in term of meaning. Therefore, it might have been an answer that people by default. The other half of the people who have drunk craft beer within the past 6 months tend to drink it quite often. 13% of them drink craft beer at least once a week and more than 18% of them drink it once every two weeks.

⁵ The order of the possible answer was random in order not to influence any choice of prewritten answer.

To sum up, about half of the people who do drink craft beer do it occasionally. The other half is doing it on a regular basis. It can be really frequent as 3 times a week, at least once a week or less frequent such as once a month. The appealing consumer are the ones that drink on a regular basis and with a high frequency. Therefore, it is fair to say that from this analysis there are approximately 34% of the people that drinks a craft beer more often than every 2 weeks.

Where do people drink craft beer?

The place of consumption is also important for the microbrewers. It can tell them where they should sell their craft beers. If most of the people tend to consume craft beer at home, there would be no need to sell craft beers in bars or the other way around. The place of consumption might also provide information about how consumers perceive craft beers. If most people consume craft beer in restaurant, it is fair to say that it might define craft beer as an experience good such as wine or even compare it to a drink that is associated for special events. Moreover, the place of consumption might reflect where microbrewers should sell their products and modify their distribution strategy. This section tries to understand such issues.

Within the survey, there was the question “Where have you drunk craft beer within the past 6 months? – select all answers that apply.”. It is important to mention that only people who answered yes at the question whether they have drunk craft beer within the past 6 months you answer this question. The order of the possible answer was random in order not to influence any choice of prewritten answer.

Table 6 - Where people drink craft beer?

Where people have drunk craft beer in the past 6 months		
Answer	frequency	percent
At a bar/pub	72	71%
At home	47	47%
at a party with friends	38	38%
At an event (eg: beer festival etc.)	32	32%
At a restaurant	23	23%
In vacation	20	20%

The result of this question shows that most of the people who consume craft beer, drink it in a bar or a pub. It suggests that craft beer is something related to a festive atmosphere. As this is the most often quoted answer, there is a real need for microbrewers to either sell in their own bar or to distribute their products to other bars as it is the current most famous place to drink craft beer.

The 2nd most quoted answer is that people drink craft beer at home (47%) which is not consistent with the previous hypothesis. Drinking craft beer might not be related to a festive atmosphere or an uncommon event. Drinking a craft beer at home might suggest that it something related to a sudden desire to drink something different from usual. It is therefore relevant for microbrewers to sell their products to their microbrewery or grocery stores to enable people to drink their product at home.

The third and fourth most quoted answers are “at an event (Eg: beer festival, sport event...)” which obtained 32% of the answers and “at a party with friends” with 38%. Those 2 answers suggest that a part of craft beer consumption is related to something unusual or festive. It might therefore be categorised into the experience good. The atmosphere is likely to be an important factor.

Interestingly, at a restaurant only got 23% of the answers. It is not much, and many microbrewers try to sell their products through restaurants in Geneva or elsewhere. Either it is not successful or underdeveloped or not the good place at all to sell their product. This might be an area where microbrewers can improve their sales.

To conclude, it appears that bar and pub is an essential distribution channel for microbrewers. Grocery stores and easy access to people is the key for them to keep continuing to consume at home. The atmosphere such as festival or a party with friends also boost the consumption of craft beer. Craft beers suggest being more consumed with a certain atmosphere such as being festive. Restaurants appear to be either underestimated by microbrewers to distribute their craft beers or either not the best place for consumer to drink such a product.

How hard is it to find craft beer in the market of Geneva?

In Geneva, there are approximately 45 different microbreweries that create many different types of craft beer. According to the result of the survey, most people tend to believe that it is not hard to find craft beer.

More than 80% of the answer are 5 or below which means that people tend to believe that it is easy to find craft beer. 1 means that it is super easy to find craft beer and 10 is impossible or extremely hard to find craft beer.

Table 7 - Is it difficult to find craft beers?

How hard it is for consumer to find craft beer in the canton of Geneva		
Answer	Frequency	Percent
1 to 5 (easy)	80	78%
6 to 10 (difficult)	22	22%
Total⁶	102	100%

Another interesting fact is that there is a clear correlation with the fact of how long people do consume craft beer and the easiness to find craft beer.

In a way it might make sense. The longest a person has been consumed craft beer the more this person know about how to find a craft beer. However, the previous result still clearly shows the easiness to find a craft beer.

Table 8 - Regression result of how long customers have been consuming craft beer and how hard is it to find it

Reg: Since when people consume craft beer, How hard is it to find craft beer

	coef	P>(t)
How hard is it	-0.3995554	0.066
cons	6.336995	0

The T-test suggest that we can reject the null hypothesis. As the coefficient is negative, it is fair to say that; unsurprisingly people reporting finding a craft beer in Geneva is easy are also people that have been consuming craft beer for a long time. Long time can be defined as more than 4 years.

In conclusion, the market looks well supply in Geneva. It appears to be easy for consumer to find craft beers.

Amount spent by consumers

How much people are willing to spend for a craft beer is an important variable for the microbrewers? In other words, the perceived value of a craft beer. As craft beer is a product that is more local and differentiate than a mainstream beer that can be found anywhere, there must be a higher perceived value than a mainstream beer. This section tries to address this hypothesis.

Within the survey, a question was about the price a person spends per month for craft beer. The result was the following:

⁶ Only people that have drunk craft beers in the past 6 months were able to answer this question.

Table 9 - Amount spent by consumer per month

How much spent for craft beer per month in CHF		
Answer	Frequency	Percent
Less than 10	28	27%
10 to 20	44	43%
20 to 50	21	21%
50 to 80	6	6%
80 to 120	2	2%
120 and more	1	1%
Total	102	100%

It appears that people who consume craft beers spent quite different amount of money per month. The range from 10 to 20 CHF is the one with the higher percent of answers (43%). Almost half of the people who answered this question put that this range was the amount spent per month for craft beers. It suggests that people do not drink many beers per month.

The second most answer range is less than 10 CHF with approximately a third of all the answers (27%). Those are most likely people who consume beer occasionally. It is confirming the previous number and theories as with that amount of money spend per months, there is no other answer possible for an occasional consumption.

The third price range is from 20 to 50 CHF a month. This price range represent 21% of the answers. Those are most likely loyal consumers that consume craft beer at least twice a week.

It is interesting because the 3 previous categories together represent more than 91% of all the answers. It means that people are very unlikely to spend more than 50 CHF a month for craft beers. There are only 3% of people who consumer craft beer that spend in each of the other price categories which are: 50 to 80 CHF, 80 to 120 CHF and more than 120 CHF

To summarise this section, the typical amount spend range within a price range of 10 to 20 CHF. Not many people spend more than 50 CHF per month for craft beers.

This result is interesting but there is still a parameter that is missing. Microbrewers might obtain a higher value for their product due to some other factors. Even if the typical amount spends for craft beer per month remain low, microbrewers might enjoy a premium on the price of one beer if it is locally produced?

Within the survey, two questions were directly addressing this issue. The first question was “Are you willing to pay more for a craft beer that is locally produced?” and the second was “If yes, how much more are you willing to pay?”

The result of this question shows that 93% of the people that drink craft beers are willing to spend more for a product that has been done locally. It would suggest that people living in Geneva will pay more for a craft beer from Geneva than anywhere else. Then, more than 90% of the people who drink craft beer are supposed to be willing to pay more for a craft beer that was locally produced than a mainstream beer which not locally produced.

It is interesting to see to what extent a person is willing to pay more for a craft beer that was locally produced. Therefore, a question in the survey was asked to understand this question. The question is “If yes, how much more are you willing to pay in comparison to a mainstream beer such as Heineken or Carlsberg?”

Table 10 - How much more a person is willing to pay?

If yes, how much more are you willing to spend?			
Answer	Frequency	Percent	Cumul percent
1 - 20%	44	46%	46%
21 - 40%	37	39%	85%
41 - 60%	10	11%	96%
61 - 80%	2	2%	98%
81 - 100%	1	1%	99%
More than 100%	1	1%	100%

The result of this question shows that most of them (85%) are likely to spend in general until 40% more for such a product. There are approximately 46% of the people who are willing to spend until 20% more than a mainstream beer and 39% of the people who are willing to spend from 21% to 40% more for a craft beer.

Very few people are likely to spend more than 40% of premium for a craft beer locally produced instead of a mainstream beer.

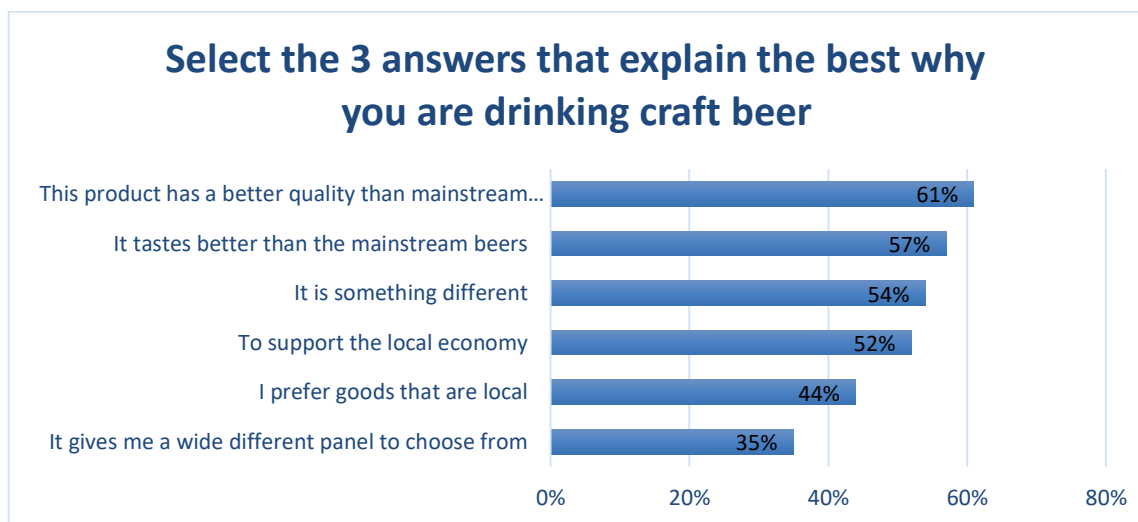
However, this premium is still quite consequent. Microbrewers need to use this advantage and advertise on the quality or the different taste that craft beer possess. It will make them able to sell their product more often and might even be able to raise the price of their product. But it is important to mention that people might not pay 40% in average. Many people are saying things that they do not do or respect.

What is important for consumer of craft beer?

This section analyses what are the factors that are important for the consumption of craft beers. It is essential for microbrewers to understand what make people drinking craft beer. By understanding, they will be able to use those criteria to advertise or change their way of producing craft beer.

In the survey, there was a question about that addressed this issue. The question was “Select the 3 answers that explain the best why you are consuming craft beer?” There were 6 possible answers: “it is something different”; “It tastes better than the mainstream beers”; “It gives me a wide different panel to choose from”; “To support the local economy”; “This product has a better quality than mainstream beers”; “I prefer goods that are local”. Those preselected answers were changing the order of answer randomly to not influence the selection of any of them. There are 65 people who answered this question.

Figure 2 - Why people drink craft beer answer



The analysis of this preselected answers shows that people are perceiving that the quality of a craft beer is higher than a mainstream beer. Therefore, microbrewers should keep focusing on creating high quality products with good raw materials. Taste also has an importance for consumer. Consumers believe craft beers have a better taste. It is true that craft beer does have a different taste than mainstream beer. It appears that it appeals to consumers. Differentiation is also something that matters to consumer. Consumers are seeking products that are tasting differently than mainstream beers.

On the other hand, the aspect of contributing to local economy or consuming local products has a little impact to consumer. It is not in accordance with the previous analysis regarding the question if a person is willing to pay more for a craft beer that was locally

produced. The result from the question “Select the 3 answers that explain the best why you are consuming craft beer?” might just mean that it is less important for consumers that the craft beer was locally produced than the fact of high quality with a good taste and highly different from a mainstream beer. It also suggests that those 3 criteria will bring more value to the customer and are willing to pay more for that than a locally produced product. Diversity of product is the least important answer for consumers. This result might arise because a typical consumer does not drink many different craft beers but rather sticks to the ones they have already tried and like.

To conclude, consumers want a high-quality product with a good taste that is different to mainstream beer. Those criteria are the most important factors that make people consume craft beer. The contribution to the local economy or the fact that the product was locally produced is less important but still brings some added value to the product. The huge panel of craft beer within the market is not a parameter that explains why people consume a craft beer, or at least is less significant.

From where does people living in the area of Geneva drink beer and to what proportion?

This section will try to analyse from what region people living in Geneva consume craft beer from. Even if most of the people who answered the survey were from Geneva or really close to this city, the result of this question is quite meaningful.

Within the survey, the question asked was “What percentage of craft beer from Geneva, other cantons or other country do you consume?” The possible answers were either 0%, 1-20%, 21-40%, 41-60%, 61-80%, 81-100%. The total of the answer was up to 100%. It means that a person who answers that he drinks between 41-60% of his total consumption in the canton of Geneva could only say at a maximum that he does the same in other cantons and 0% in other countries.

From Geneva:

Table 11 - Consumption of craft beers from Geneva

What percentage of craft beer do you consume from Geneva			
Answer	Frequency	Percent	Cumul percent
0%	5	5%	5%
1 - 20%	27	27%	32%
21 - 40%	27	27%	59%
41 - 60%	17	16%	75%
61 - 80%	15	15%	90%
81 - 100%	11	10%	100%

It appears that people do not consume most of their craft beer in Geneva. Only approximately 5% of the people living in Geneva or the close neighbourhood that have drunk craft beer in the past 6 months do not consume any craft beer coming from Geneva. Interestingly, 27% of them only consume from 1% to 20% of the total amount of craft beer they drink coming from Geneva. Some other consumers that consume only from 21-40% of craft beer from Geneva are 27%. Combining those 3 categories together, there is 59% of consumer that consume at the maximum 40% of their craft beers from Geneva. That is a big proportion of the population that do not drink an high quantity of craft beer coming from Geneva.

On the other hand, some people only consume craft beer from Geneva (10%) or a large quantity which range from 61-80% are 15%. The category 41-60% has a 16% result.

To conclude, it seems to have a high proportion of people who live in Geneva and consume craft beer, are consuming craft beer from somewhere else. This can be a real a real opportunity for microbrewers of Geneva. Indeed, there is a potential demand that can be capture by microbrewers of Geneva.

From other Cantons:

Table 12 - Consumption of craft beers from other cantons

What percentage of craft beer do you consume from other cantons			
Answer	Frequency	Percent	Cumul percent
0%	17	17%	17%
1 - 20%	44	43%	60%
21 - 40%	22	21%	81%
41 - 60%	12	12%	93%
61 - 80%	4	4%	97%
81 - 100%	3	3%	100%

Regarding the other cantons, it appears that many people do not consume much from there. 60% of the people answered that they either do not consume craft beer at all or maximum 20% of their consumption of craft beer from any other canton than Geneva.

There is approximately 3% among the people who answered the survey that have large part of their consumption (61% to 100%) in another canton. This is not much. Approximately 12% of the people answered that they had a relatively high consumption (41-60%) of craft beer from other cantons.

To recapitulate, craft beers from other cantons appears to be relatively low threat for microbrewers of Geneva but is still a relative source of potentials consumers.

From other countries:

Regarding other countries, it appears that it is not a real threat for microbrewers of Geneva. There are 67% of the people that have a relatively low consumption (0% to 20%) of craft beer from other countries. The category 21-40% is having 21% of the answers. It is significant. The relatively high consumption or high consumption (from 41% to 100%) possess 12% of the answers. Other countries do have a certain market share of the craft beer consumption of people living in Geneva or in close neighbourhood, but it clearly remains low.

Table 13 - Consumption of craft beers from other countries

What percentage of craft beer do you consume from other countries			
Answer	Frequency	Percent	Cumul percent
0%	31	30%	30%
1 - 20%	38	37%	67%
21 - 40%	21	21%	88%
41 - 60%	5	5%	93%
61 - 80%	6	6%	99%
81 - 100%	1	1%	100%

To conclude, the market of Geneva regarding craft beer consumption is quite interesting and a bit strange. Craft beer from Geneva are not consume as much as they could have been. A fair amount of craft beer is consumed from other canton and other countries. This analysis might be biased by the fact that people do not really know what a craft beer is. If someone believes that a typical Belgium beer such as “la chouffe” is a beer made by a microbrewery, there are wrong. This might also influence the data for the other country table. But this can also suggest that microbrewers of Geneva are not as good or as developed as their close neighbours. It is an opportunity for them to develop their business and catch customers that drink craft beers from other places.

Is craft beer a new type of drinks or something relatively newly consumed?

Craft beer is a fairly new consumed product. In each country it started to be consumed at a different moment. The earliest country that has adopted craft beer was the UK. The movement started in the early 70s. Regarding Switzerland, due to the cartel that was killing competition until the 90's this movement started quite later than most of the other neighbour countries. The oldest microbreweries in Switzerland were created the late 90's and early 2000's (BOV, 2017).

As craft beer is very recently consumed in Switzerland it would be interesting to see specifically about the market of Geneva and its close neighbours. The result of this analysis will be helpful for the local microbrewers to understand if most of their customers were early adopters or if many people started to consume craft beer very lately.

Table 14 - Since how long people consume craft beers

Since when people drink craft beers			
Answer	Frequency	Percent	Cumul percent
From 0 to 3 years	52	51%	51%
From 3 to 6 years	29	27%	78%
From 6 to 9 years	8	8%	86%
From 9 to 12 years	9	9%	95%
More than 12 years	4	5%	100%

As beer beverage can legally be consumed only from the age of 16, the consumption of craft beer will be linked to the age of the person. This analysis doesn't take the variable age in account because the people who answer the survey were quite representative of a normal panel of people. There were young people 17 years old to people much older such as 74 years old. Therefore, analysis the result from the 101 people who consume craft beer would be relevant.

The result shows that from the people who answered the survey, there are more than 50% of the panel who have started to consume craft beer in the past 3 years. This result shows that the market craft beer is really a new product for people living in Geneva. From a marketing standpoint it would suggest that drinking craft beer is not anchor yet into the consumer mind as it is too recent for it. There is only a bit more than 14% of the people who have been consuming craft beer for more than 9 years. Those were the early adopters of the local microbreweries of Geneva or even Switzerland.

Interestingly, the fact that people consume craft beers since a really short period of time is playing in favour of the microbrewers. It would indicate that the market will consume more and more craft beer since the number of microbreweries in Geneva is constantly

rising throughout the years. Many new consumers are expected to discover craft beer through advertisement or word of mouth and some of them will become loyal and regular consumers.

What is the favourite craft beer of consumer in Geneva or the close neighbourhood?

This section tries to understand what the favourite craft beer of people living in Geneva or its close area is. This analysis is based on one question in the survey. The question is “What is your favourite craft beer?”. As mentioned in the introduction, the survey has been done for analysis the market of Geneva. There were 101 people who answered this question. In Geneva there is approximately 40 different microbreweries and more than hundreds of different beers.

Table 15 - Favourite craft beer/microbrewery analysis

Favourite craft beer/microbrewery		
Microbrewery name	frequency	rank
Brasserie des murailles	18	1
Calvinus	11	2
Père Jakob	10	3
L'apaisée	5	4
Les brasseurs	4	5
Bière du lac	3	6
Bière du virage	3	6
Captain Mousse	3	6
DR Gabs	3	6
I don't know ⁷	14	7

The few craft beers that were repeated several times were coming from “Brasserie des Murailles” which appeared 18 times. The answered were either specifying the brewery or the name of the beers created within the enterprise such as “La sorcière” or “La Nébuleuse”. It is interesting to mention that this brewery is one of the oldest

⁷ The second most answered response was “I don’t know” which appeared 14 times. As it is not a microbrewery and very relevant the choice has been made to put this answer at the 7th position. There are 2 ways of understanding this answer. The first one is that they don’t know what craft beer is there favourite. The second one is that they don’t know any craft beer. Either way, there is an idea of lack of knowledge. It is not surprising that many people did answer in such a way. In fact, it appeared many times through the survey that many people did not have any idea about what is a microbrewery or what a craft beer was. The idea of a lack of education regarding such industry is certainly related to the newness of microbreweries in Switzerland.

microbreweries in the left side of the lake of Geneva. The number of answers is certainly related to this fact and that the brand name of this company is easy to find in many bars within the city.

The second most answered response is “Calvinus” which appeared 11 times. Calvinus is one of the oldest craft beers of Geneva (1999). This beer was brewed in Geneva, but this has changed and now Calvinus is brewed in Appenzell. This is one of the oldest beers in Geneva and the enterprise is very famous. However, it is important to mention that this beer cannot be considered as a beer from a microbrewery anymore, the production capacity is too big.

The third most answered response was “Père Jakob” (appeared 10 times) which is also a microbrewery in Geneva. This is the second biggest after “La Brasserie des Murailles”. “Père Jakob” is located at Sorral on the right side of the lac and is quite famous in the canton.

What was interesting from this question was the fact that people quoted only 22 different answers for craft beers in 66 answers for this question. From the 66 answers only 13 were either a craft beer from Geneva or a microbrewery. Again, it shows the lack of notoriety for the Geneva area.

6. Recommendation

This section has a goal to provide few recommendations thanks to the consumer analysis to the microbrewers of the canton of Geneva.

Even if it seems that for most customers it is easy to find craft beer in the market of Geneva, there are still some people that do not know how to find some. It is especially true for people that do not drink craft beer. More advertisement might be needed on social media and websites to emphasis where people can find their products.

Many microbrewers distribute their beer mostly directly at their production site or through local restaurants. However, the analysis shows that restaurants is one of the places the least used by customers to drink craft beers. The analysis shows that bars are a place where customer drink more often craft beer. Microbrewer could invest to have a bar within their production local like the microbrewery Bière du lac or could distribute more to bars if their production capacity allows them. A great place to distribute to bars would be “Rue école de Médecine” which is quite famous to have frequented bars.

The current pricing strategy of microbrewers seems to be reasonable. The premium that consumers pay because the product is produced locally and with a different taste and quality than mainstream beers is currently well exploited and doesn't seem to bother its consumers.

As it appears that still many customers consume craft beer from elsewhere than the canton of Geneva and that the most important features for customer are: the quality of craft beer and the taste that is different from mainstream beer; powerful associations such as ABIG might be able to advertise to change the mindset of consumer that consume from somewhere else. With this strategy, they will be able to capture new customers and even benefit other microbreweries in the market of Geneva.

Plus, as craft beer is a relatively new product, there are many customers that have probably never tried or even do not know the existence of such a product. Microbreweries of Geneva are already trying to promote their product through festival such as “Journée des brasseries indépendantes” organised by the ABIG association and Geneva beer festival which promote many different craft beers and many different microbreweries. Those festivals are only advertised through social media and not at all through local radio or TV. Maybe more advertisement should be done like “cave ouverte” for wine which is a real success. By doing so, many new consumers might discover craft beer and become long term loyal consumers. Awareness is the key for the craft beer industry.

7. Conclusion

After having examined the challenges faced by microbreweries of the market of Geneva thanks to a questionnaire and many meetings with different microbrewery, the conclusion is the following: there are 3 main challenges faced by the microbrewers of Geneva. The most difficult is probably finding an appropriate warehouse spacious enough, well positioned and not too expensive to be able to brew their craft beer and to sell their products. The second major challenge is the cost of purchasing the machines and all the tools related to the production of craft beer. Indeed, this is the biggest initial investment which can amount several thousand of CHF. The third challenge is related to the second, this is how the microbrewers are going to get finance to purchase their machinery. Most of them are using the FF (Family, Friends) strategy. However, some of them have been able to obtain bank loans or even used a crowdfunding strategy. The daily business is also a form of challenge while being in the microbrewery industry. Obtaining the knowledge to produce a consistent beer, managing the cashflows, human resources management as well as creating an efficient distribution channel is constant challenge.

The microbrewery industry of Geneva is currently changing. The number of microbreweries has increased during many years, but it is not likely to continue forever. Many microbrewers believe that the market of Geneva has eventually reached its limit or will reach it very soon. The current major microbrewers are growing and developing many new different products. Association such as ABIG are helping each other to grow.

Regarding the consumer survey, the following consumer profile can be drawn. The current study has demonstrated that male with a certain income and education is the typical consumer of craft beer. The main reasons that push people not to drink craft beer are personal choice or related to taste. There is not much a microbrewer can do about it except changing the taste of their products. Regarding the frequency of consumption of craft beer, there are 2 different groups of people. There is the one that consumes craft beer occasionally and the one that drinks it more often. Still the group that drinks it occasionally is much bigger than the one that drinks it often. Craft beer appears to be drunk most of the time in bars/pubs or at home. Interestingly the analysis shows that restaurants are not so much the place where people from Geneva drink such a product. It can be an opportunity for microbrewers if there are not working much with restaurants. People that live in Geneva or in the close neighbourhood believe that the access to craft beer is not so much a problem. It therefore suggests that the market is well supplied. Most of the people who drink craft beers are willing to pay more for it if it is locally produced and willing to pay more than for a mainstream beer. Most of the people are willing to pay until

40% more for a craft beer than a mainstream beer, which suggest the image of a better value for craft beer. Microbrewers might therefore be able to play with the price as it is currently not a real problem for consumers. Consumers believe that quality and better taste are the most valuable features of a craft beer. It is the biggest reason of the consumption for such products. The idea of support for local economy or local product has little to do with the reason of their consumption but is still a valuable feature which is a bit contradictory with the previous result regarding the willingness to pay more for a local product. Interestingly people living in Geneva or the close neighbourhood are not consuming as much craft beer coming from the canton of Geneva as we would think. There is still a consequent market share consumed from elsewhere such as other cantons or other countries. It might be seen as an opportunity for microbrewers of Geneva as they can improve their market share by becoming more famous or creating better product than their competitors elsewhere. However, it might also suggest that people are not caring from where it comes from but rather care about the taste or other criteria such as the famousness or the easy access to purchase those products. Craft beer appears to be a relatively young product in the market of Geneva. It might explain the previous result regarding the consumption of products from elsewhere. As this is a new product in the market of Geneva it is certainly full of opportunities for microbrewers to gain new consumers that haven't tried it yet. The last information this analysis provide is that the favourite craft beer of people living in Geneva or its neighbourhood are the 3 biggest microbreweries of Geneva as well as the oldest which are "La Brasserie des Murailles", "Calvinus" and "Père Jakob". Many people have no opinion about their favourite and many answers were from different cantons or countries.

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9. Appendix

Appendix 1: Microbrewers' survey

Microbrewery Survey

Name of the microbrewery

Votre réponse _____

ZIP code of the enterprise

Votre réponse _____

Year of creation of the enterprise

Votre réponse _____

Number of employees (in full time equivalent)

Votre réponse _____

What kind of beer are you selling? Select all the correct answers

Amber

White

Blonde

Brown

Special beer (Christmas, very strong, etc.)

Other

Number of different varieties you are selling

Votre réponse _____

In average, how many varieties are available during the year?

Votre réponse _____

Regarding your conditioning strategy, what is approximately for each strategy the sale percentage in comparison to the total of sales?

	0%	1-20%	21-40%	41-60%	61-80%	81-100%
Bottle	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Casks	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

What is the average price of a beer sold (33cl), by variety, to a consumer that purchase directly a beer at your microbrewery in CHF?

	0 CHF (I do not sell this variety of beer)	0.05-2 CHF	2.05-2.95 CHF	3-3.95 CHF	4-4.95 CHF	5-5.95 CHF	6-6.95 CHF	7-9.95 CHF	10 CHF or more
White	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Blonde	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Brown	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Amber	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Red	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Special beer	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Other	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

What is the average price of a beer sold (33cl), by variety, to a distributor (bar/restaurant) in CHF?

	0 CHF (I do not sell this variety of beer)	0.05-2 CHF	1-1.95 CHF	2.05-2.95 CHF	3-3.95 CHF	4-4.95 CHF	5-5.95 CHF	6-6.95 CHF	7-9.95 CHF	10-14.95 CHF
White	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Blonde	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Brown	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Amber	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Red	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Special beer	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Other	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

What is your annual production of beer in HL?

Votre réponse _____

What is the current use rate of your machines in comparison to their maximal capacity?

- less than 20%
- 20-40%
- 41-60%
- 61-80%
- 81-100%

Do you earn enough revenue to live from your microbrewery?

- Yes
- No

Microbrewery Survey

Who are your customers?

What is, in your opinion, the share of your customers that are from Geneva?

- less than 20%
- 21-40%
- 41-60%
- 61-80%
- 81-100%

What is in your opinion, the age range of your typical customer?

- 16-24 years old
- 25-34 years old
- 35-44 years old
- 45-54 years old
- 55-64 years old
- 65 years old or more

For approximately how much, your average consumer purchases each time he/she comes to your microbrewery?

- 0-30 chf
- 31-60 chf
- 61-100 chf
- 101-130 chf
- 131-160 chf
- 161-200 chf
- 201-250 chf
- 250 chf or more

Microbrewery Survey

Distribution of your beers

Where are you selling your beer ? in sales shares

	0%	1-20%	21-40%	41-60%	61-80%	81-100%
Locally (Geneva)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
In other cantons	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
In other countries	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Regarding the sales shares that are local (in Geneva), what is the percent by distribution channels?

	0% (I don't use this distribution channel)	1-20%	21-40%	41-60%	61-80%	81-100%
In your microbrewery	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Bars/ restaurants	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
events	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Wholesale distribution	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

If you are selling in other cantons, what is the percentage of sales by distribution channel? Answer only if you do sell beer in other cantons.

	0% (I don't use this distribution channel)	1-20%	21-40%	41-60%	61-80%	81-100%
Bars/ restaurants	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
events	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Wholesale distribution	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

If you are selling in other countries, what is the percentage of sales by distribution channel? Answer only if you do sell beer in other countries.

	0% (I don't use this distribution channel)	1-20%	21-40%	41-60%	61-80%	81-100%
Bars/ restaurants	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
events	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Wholesale distribution	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

What is the average distribution cost (by liter of beer sold) in CHF?

- 0 chf (I do not distribute my beer)
- 0-30 cents
- 35-60 cents
- 65 cents to 1 chf
- 1.05 to 1.35 chf
- 1.40-1.65 chf
- 1.70-2 chf
- 2 chf or more

Rank in the ascending order, what distribution channel is the most profitable. (1 is the most profitable and 4 the least)

- In your microbrewery
- Bars/restaurants
- cultural event
- Wholesale distribution

Microbrewery Survey

Future of the microbrewery industry

Is there a particular reason for selling only in the canton of Geneva? Please answer this question only if you are selling only beer in the canton of Geneva.

- I do not know the consumer of elsewhere
- I do not have the distribution channel to go elsewhere
- The market of Geneva is sufficient
- My production of craft beer is too weak to go elsewhere
- I do not want to go in other cantons

Who are, in your opinion, your main/direct competitors?

- Famous mainstream brands (Carlsberg, Feldschlösschen, Heineken, etc.)
- Microbrewers of the area

Do you believe it is easy to enter the market of Geneva being a microbrewery of another canton?

- Yes
- No

Microbrewery Survey

Production local

How long have you been looking for finding a production local?

- Less than 3 months
- 3-6 months
- 6 months to 1 year
- 1-2 year
- More than 2 years

What is your renting cost of your production local per month in CHF?

Votre réponse _____

What percentage of your total cost represent the cost of your production local?

- less than 20%
- 21-40%
- 41-60%
- 61-80%
- 81-100%

Do you believe that there is the need to change/extend your production local in the next 2 years.?

- Yes
- No

What is the total value of your initial investment in CHF?

Votre réponse _____

What is your maximum production capacity in HL per year ?

Votre réponse _____

Microbrewery Survey

Procurement of raw materials

What is in average, the total cost of raw materials (water, hop, spices, yeast, bottle, etc.) by liter of beer in CHF ?

Votre réponse _____

Is it easy to find different suppliers for hop and barley?

- Yes
 No

Do you favour local raw materials ?

- Yes
 No

Do you sometimes practice group purchase with other microbrewers ?

- Yes
 No

Rubrique 7 sur 7



Section link to an expansion

Description (facultative)

Do you believe that you'll need to expand your enterprise in the next 2 years ?

- Yes
 No

If no, why ?

Réponse courte _____

With your current production capacity of craft beer, do you believe that your production cost (by liter for example) would rise if you produce more ?

- Yes
 No

Appendix 2: Consumer survey

Microbreweries consumer survey

This Survey was done by a student that is using this data for its Travail de Bachelor

*Obligatoire

What is your ZIP code *

Votre réponse

What is your gender ? *

- Male
- Female
- Other

How old are you ? *

Votre réponse

Occupation *

- Student
- Employed
- Not currently employed
- Student and employed
- Retired
- Other

Higher degree of education achieved *

- Cycle d'orientation (middle school)
- Maturité/CFC (High school)
- Bachelor
- Master
- PHD

Are you ? *

- Married or partnered ?
- Single, divorced, separated or widowed

Which category describe best your annual income in CHF before tax? *

- 50'000 or less
- 50'000 to 75'000
- 75'000 to 100'000
- 100'000 to 125'000
- 125'000 to 150'000
- 150'000 or more
- Prefer not to declare

Did you drink a craft beer (a beer made in a traditional way by a small brewery) in the past 6 months? *

- Yes
- No

SUIVANT

If the person drinks craft beer

Description (facultative)

Select the top 3 reasons why you drink craft beer? *

- It is something different
- It taste better than mainstream beers
- It gives me a wide variety to choose from
- To support the local economy
- It is a higher quality than mainstream beer
- I rather have products that are local

Approximately how often do you drink craft beer ? *

- At least once a week
- Once every two week
- More than 3 times a week
- Once a month
- Once in a while

⋮

Where do you usually drink artisanal beers (over the past 6 months)? (Select all that apply) *

- At home
- At a bar/pub
- At a restaurant
- On holiday
- At a party with friends
- At an event (eg: beer festival, music event, etc.)

How difficult is it for you to find craft beer? *

	1	2	3	4	5	6	7	8	9	10	
Not hard	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Extremely hard

How much do you usually spend on craft beer per month in CHF *

- Less than 10
- 10-20
- 20-50
- 50-80
- 80-120
- 120 or more

Do you consume craft beers from other canton or other countries? What would be (more or less) the percentage of beers from Geneva/ other cantons / other countries, you typically consume in a year? *

	0%	1-20%	21-40%	41-60%	61-80%	81-100%
Geneva	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Other cantons	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Other countries	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Since how long approximately do you drink craft beer ?

Réponse courte

When you go in a bar, are you asking first if they do have some craft beers ?

Yes

No

Are you willing to pay more for beers that are locally produced? *

Yes

No

Rubrique 3 sur 5



If the person is willing to pay more for beer locally produced

Description (facultative)

If yes, how much more are you willing to pay in comparison with a mainstream beer such as Heineken or Carlsberg? *

1-20% more

21%-40% more

41-60% more

61%-80% more

81%-100% more

more than 100%

How much do you like beer ?

Description (facultative)

On a scale from 1 to 10, how much are you a beer aficionado? *

	1	2	3	4	5	6	7	8	9	10	
Not at all	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Very much

Could you guess how many micro or local breweries exist in the canton of Geneva? Give a number. *

Réponse courte

Approximately what percentage of your total alcohol consumption over the past 6 months was consumed for the following alcohol groups? Percentage need to add up to 100% *

	0%	1-20%	21-40%	41-60%	61-80%	81-100%
Craft beer	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Mainstream b...	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Wine	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Spirit	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Cider	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Other	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Are you also deeply interested in other alcohols than craft beers?

yes

No

If you were to purchase a craft beer tour for yourself or a friend, give a ranking of your level of importance of the following features of such a tour. (1 being the most important and 7 the least)

 Grille à choix multiples ▼

Lignes		Colonnes	
1. Seeing local establishment	×	<input type="radio"/> 1st choice	×
2. Learning about local history	×	<input type="radio"/> 2nd choice	×
3. Learning about beer style	×	<input type="radio"/> 3rd choice	×
4. Learning about beer's ingredients and produc	×	<input type="radio"/> 4th choice	×
5. Meeting new people	×	<input type="radio"/> 5th choice	×
6. Sampling a number of different beers	×	<input type="radio"/> 6th choice	×
7. Learning about how to match beer with food	×	<input type="radio"/> 7th choice	×

The person does not drink craft beer

Description (facultative)

Select the top reason why you haven't drunk craft beer in the past 6 months *

- I do not like beer
- I had no idea such product existed
- It is too expensive
- I prefer mainstream beer
- I do not know where I can purchase such a product
- I believe it is overrated
- I do not drink any alcoholic beverages