Bachelor Thesis Bedrijfs- en Consumentenwetenschappen

Market orientation in microbreweries

What aspects of market orientation are used by Dutch microbreweries?

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CONTENTS

1 INTRODUCTION

In the last decade, an enormous craft beer revolution has taken placeIn The Netherlands, the number of breweries increased by 679 (www.nederlandsebiercultuur.nl): from 129 breweries in 2010 to 808 in 2020 (see Graph 1 in appendix). These breweries all have to sell their product in this growing market. Some research has been conducted concerning the demand side of craft beer (Aquilani, B., Laureti, T., Poponi, S., & Secondi, L. 2015). It describes what the needs, preferences and buying behavior of consumers look like. The connection between brand identity of breweries/beer and consumer preferences, has been made too (Allison, R., Uhl, K., 1964). The supply side, however, has not been investigated much in The Netherlands.

As the craft beer market has experienced a lot of growth,market saturation is lurking. With more players on the market, standing out of the crowd becomes more important. Small breweries need to have customers to buy their beer. By being market oriented as a business, customer preferences can be addressed adequately.

Market orientation has been discussed and defined by several researchers (Jaworksi & Kohli, 1990; Narver & Slater 1990; Deshpande, Farley, and Webster 1993). It consists of the generation of information from the market, the analysis of this information, and the dissemination of the information throughout the business. The main purpose is to respond efficiently to this information in a coordinated way, that includes the entire company and generates superior value for the customer (Jaworski & Koli, 1990). Market orientation has been proven to be positively related to the performance of an organization (Narver and Slater 1990; Slater and Narver, 1994; Jaworski and Kohli, 1993; Kirca, Jayachandran, and Bearden, 2005), so implementing this in the organization might be a good approach for microbreweries.

In this report is described what market orientation is and if and how microbreweries in The Netherlands are market oriented, by answering the following research question:

What aspects of market orientation are used by Dutch microbreweries?

For small enterprises, it is difficult to compete in markets that have become more accessible. The increase of accessibility can be caused by easier access to information and equipment (van Dijk, M., Kroezen, J., & Slob, B., 2017). To know what works and what could be successful, a clear description of market orientation is needed. In this thesis,the market orientation in microbreweries is analyzed as well as the effect it has on their performance.

This thesis consists of both a literature study and an analysis of qualitative interviews held with owners/managers of microbreweries in The Netherlands. Six breweries are interviewed to gain insight into their level of market orientation. By answering the following sub-questions, the research question will be answered.

Via the first sub-question: *What is a market orientation?,* existing literature on market orientation is investigated. To make this applicable for microbreweries, we need a definition of small firms: *How are small firms defined in The Netherlands?* Then the approach market orientation is applied to small firms via the following question: *What is market orientation in small firms?*

The next sub-questions are answered through the analysis of the interviews. Insight in the different aspects of market orientation of microbreweries are given through the following questions. The first question dives into the customer orientation of microbreweries: *In what way are microbreweries in The Netherlands customer oriented?* The second question dives into the competitor orientation of microbreweries: *In what way are microbreweries in The Netherlands competitor oriented?* To investigate if and how microbreweries gather market information, the following question is asked: *How do microbreweries in The Netherlands gather market intelligence?* Subsequently, the next question, which investigates how microbreweries respond to the gathered market intelligence: *In what way are microbreweries in The Netherlands responsive to the market intelligence?* The last sub-question investigates the relationship between market orientation in microbreweries and the performance of these small firms: *How does market orientation affect the performance of microbreweries in The Netherlands?*

These eight sub-questions give a broad insight into the market orientation of microbreweries in The Netherlands and will answer the main research question.

2 Theory

2.1 What is market orientation?

Before looking into whether microbreweries in The Netherlands are market oriented, a theoretical framework of market orientation is important. In this chapter, the leading literature concerning market orientation is discussed to give a definition.

Many authors researched what market orientation is, how it can be implemented in a business, and what effect market orientation has on the performance of businesses. In 1990 two market orientation studies emerged, written respectively by Kohli & Jaworski, and Narver & Slater. These two studies were the start of market orientation research and are to this day still used in studies.

Their studies can be summarised, on the one hand, in the behavioral perspective of Kohli & Jaworski, which is reflected in their definition of market orientation:

"*Market orientation is the organization-wide generation of market intelligence, dissemination of the intelligence across departments and organization-wide responsiveness to it*"
(Kohli & Jaworski, 1990, p. 54).

And on the other hand, the cultural perspective of Narver and Slater:

"*Market orientation is the organization culture that most effectively and efficiently creates the necessary behaviors for the creation of superior value for buyers and, thus, superior performance for the business*" (Narver & Slater, 1990, p. 21).

The need for a clear definition of market orientation emerged, when a gap between the marketing business philosophy of organizations and the actual implementation of this philosophy was noticed (Jaworski and Kohli, 1990). Organizations may state that they really care about the wants and needs of their customers, but they are lagging in actually responding to this information. The way organizations view their level of market orientation differs from how customers view the level of market orientation of organizations (Deshpandé, Farley, and Webster, 1993). Being market oriented is to listen to your market and respond to it in a way that you deliver the best possible value for your customers. To be able to do this, not only current needs should be taken into account, but also future needs are important. A market-oriented organization is able to constantly look at changes in the market and respond to it adequately. It means being more effective and efficient than the competition at identifying and responding to the needs of your target market (Kotler, 2003).

Both Jaworski & Kohli and Narver & Slater discuss three components that need to be operationally manifested in an organization's policy to be market oriented. The three themes Customer Focus, Coordinated Marketing, and Profitability (Jaworski & Kohli, 1990) will be discussed first; followed by the three behavioral components Customer Orientation, Competitor Orientation, and Interfunctional Coordination (Narver & Slater, 1990).

Behavioral perspective

While *Customer Focus* used to be seen as the mere act of obtaining information about the wants and needs of customers, market orientation goes deeper. Market oriented customer focus involves taking actions based upon the gathered market intelligence (Jaworski & Kohli, 1990). Customer focus is not only about the generation of information about customers' purchases, it is about an attitude that the entire company is based upon and actually implements what their customers (subconsciously) need (Vandermerwe, 2004). The generation of customer intelligence can be done by the organization itself, be outsourced to be conducted by a specialized external party, or by analyzing secondary sources provided by other organizations. Market oriented customer focus goes beyond what is written above. It also involves considering external market factors that affect customer preferences (Jaworski & Kohli, 1990). Examples are competition and government regulation. Next to this, also future preferences need to be taken into account (Jaworksi & Kohli, 1990). If organizations do not do this, they risk responding to historical needs rather than taking action to meet current and future needs.

Customers of organizations often do not only consist of the end-user. Other clients that influence the choices of your end-users are important too (Jaworski & Kohli, 1990). A striking example is the importance of retailers. It is critical to keep the retailers satisfied, otherwise they might give your products lower priority and thus disable the organization to cater to the needs of its end customers (Jaworski & Kohli, 1990).

The second core theme is *Coordinated Marketing*. Market orientation is not solely the responsibility of the marketing department, it needs to be incorporated into the entire organization (Jaworksi & Kohli, 1990). To effectively respond to the gathered information and data about your customers, coordinated action by various departments of an organization is important. This means that the majority of the departments need to be both aware of and be responsive to the market intelligence. A market oriented organization thus does not only consist of a marketing department, which gathers and analyses customer information, but this information is disseminated throughout the entire organization. All to deliver the best quality for their customers (Jaworski & Kohli, 1990). This coordination of departments, also called interdepartmental connectedness, enhances the market orientation by more efficiently sharing and using information (Kennedy, Goolsby, and Arnould, 2003). The whole organization is needed for producing holistic and unambiguous communication campaigns. Research and Development to design and develop a new product, Finance to fund activities, and Manufacturing to gear up and produce it (Kliatchko, J. 2005).

The third theme is *profitability*. While the first two themes are important to be market oriented, this theme is seen as a consequence of being market oriented (Jaworksi & Kohli, 1990). Other studies demonstrate that market orientation has a positive effect on performance (Jaworski & Kohli, 1993, Deshpandé et al., 1993). In the meta-analysis of Kirca (2005), this is confirmed. Although the implementation of market orientation in an organization may demand a lot of resources, the additional profits it generates exceed the costs of implementing it (Kirca, Jayachandran, and Bearden, 2005). Market orientation has a positive influence on organizational performance because it influences the innovativeness of the organization. The innovativeness in turn has a positive effect on customer loyalty and quality (see image 1) (Kirca et al., 2005). Innovativeness is an important factor in sustaining a competitive advantage and responding to the latent needs of consumers. Performance is maintained or improved when an organisation incorporates adaptive learning and is willing to change (Damanpour et al., 2009). Innovativeness can be seen as a part of market orientation and it has a positive effect on business performance (Mahmoud, C Blankson, N Owusu-Frimpong, S Nwankwo, TP Trang, 2016)

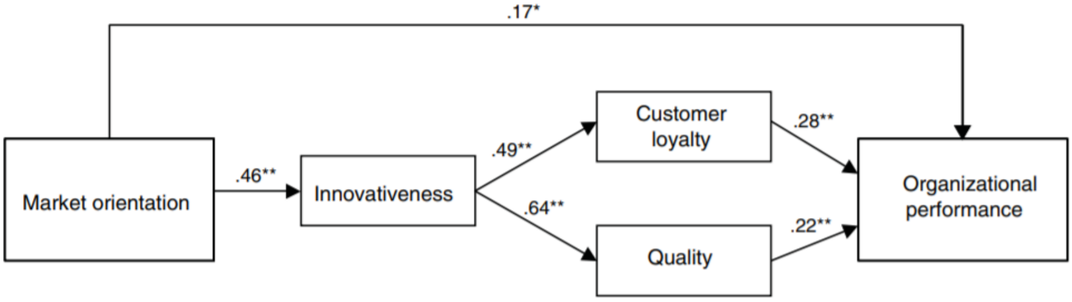

Image 1. Effect market orientation on organizational performance (Kirca et al., 2005)

Cultural perspective

Narvel and Slater show market orientation from a cultural perspective. It focusses on organizational norms and values that encourage behaviors that are consistent with market orientation (Kirca et al., 2005). The goal is to continuously provide superior value for your customers. This way a sustainable competitive advantage (SCA) can be achieved. SCA's are assets or skills of a business that provide an advantage compared to the competition. When these advantages are hard to duplicate, this SCA will result in optimal long-term performance (Aaker, 1989). Both tangible and intangible resources are relevant in creating such an advantage, according to the resource-advantage theory (Hunt and Morgan, 1996). To maintain the SCA, an organization must be proactively market oriented. This means not only filling the expressed needs of the consumer, but especially the latent needs of consumers are important (Narver & Slater, 2004)

Customer orientation is the first component. It entails understanding what your market segment consists of, what their wants and needs are and how these evolve (Narver & Slater, 1990). An essential dichotomy can be made in customer orientation. A business can either be customer-led or be market oriented (Narver & Slater, 1998). A customer-led business focusses on understanding the current needs of their current markets. It is short-term in focus and gathers information about perceptions of the products and services currently provided in the market. It leads to serving the market as it is right now, this can also be called reactive or responsive market orientation. Customer-led organizations react to the current wants and needs of their current customers. This entails little innovation in products and few to no new customers (Narver & Slater, 1998; Day, 1999). This does not only apply to small firms without the needed resources. Many organizations that were market-leader in their market in the past focused too much on what their customers wanted at that moment in time and subsequently missed out on new developments in the market (Christensen & Bower, 1996).

Market oriented businesses show similarities with customer-led businesses, but they have a long-term focus. It is also called a proactive market orientation. They not only commits to understanding the currently expressed needs of their customers, but also the latent needs. Furthermore, they commit to an understanding of the strengths and weaknesses of the competitors. This is competitor orientation (Narver & Slater, 1998) and this will be discussed below. An important feature of market oriented customer orientation is the focus on lead users. Lead users are users whose wants and needs are ahead of those of the general users. Their preferences will become general in the market place in the future (Hippel, E.V. 1986). Since these users give a fine indication of what the preferences of the future market will be, keeping track of them is useful (Narver & Slater, 1998). Being market oriented is especially important when developing new products. Innovation does not emerge from the expressed needs of consumers, but comes from filling the latent needs of consumers (Narver & Slater, 2004).

Competitor orientation is the second component. It consists of an understanding of the short-term strengths and weaknesses and long-term capabilities and strategies of both the most important current as of the key potential competitors (Narver & Slater, 1990, Narver & Slater 1998). It includes a thorough analysis of the competitors' technological capabilities to assess their ability to satisfy the same market segment (Lafferty, B. 2001).

Market-oriented businesses are committed to understanding both the expressed and latent needs of their customers, and the capabilities and plans of their competitors through the processes of acquiring and evaluating market information in a systematic and anticipatory manner.

The third theme is *interfunctional coordination*. It is comparable to the earlier discussed coordinated marketing (Jaworski & Kohli, 1990). Interfunctional coordination consists of coordinated efforts of the different departments in a company to create superior value for the buyers. This superior value is created with the help of the customer and competitor information, which is incorporated throughout the organization. Departments work together and utilize the company resources in a coordinated way. This needs to happen continuously, to secure a sustainable competitive advantage (Narver & Slater, 1990). The structure of the organization affects the interfunctional coordination. Centralization of decision-making generally makes it more difficult to pass the information on from one department to the other (Matsuno, Mentzer, and Ozsomer 2002). A centralized organization can counter this by top management emphasis on market orientation, well-functioning interdepartmental connectedness and appropriate reward systems (Kirca et al., 2005)

Information

All the components and themes discussed in the paragraphs above respond to certain relevant information from the market. The information consists of three steps.

The first step is *intelligence generation* (Jaworksi & Kohli, 1990). Market intelligence is the starting point of market orientation. It includes both the verbalized wants and needs of customers, as well as the latent preferences. It also includes an analysis of external factors that influence those needs (Jaworski & Kohli, 1990). The generation of market intelligence can be done formally as well as informally. It can be done by collecting primary data or consulting secondary sources. Personal communication with customers and discussions with trade partners or retailers are examples (Jaworski & Kohli, 1990). Other examples are formal market research such as customer attitude surveys, product testing, and market segmentation. With the digital world and internet being available to everyone, this has become a source of information for organizations too. The generation of information has become faster and cheaper (Kohli, 2017). An example is conducting online surveys to investigate customer preferences.

The second step is *intelligence dissemination* (Jaworksi & Kohli, 1990). Responding to the market requires a coordinated collaboration of the different departments in an organization. This can only be achieved when everyone in the organization is aware of the market intelligence generated in step one. Better integration between departments has a positive effect on the information dissemination. The dissemination of information can be done formally through for example periodic newsletters (Jaworksi & Kohli, 1990). Furthermore, it can be done informally. ‘Hall talk’ can be used as a tool for keeping employees tuned to customers and their needs. An important feature of intelligence dissemination is that it does not only go from one department to the other. Horizontal communication describes the continuous flow of information within and between departments (Daft and Steers, 1985). This facilitates interdepartmental problem-solving and enhances efficiency and market orientation. Digitalization has helped improve the intelligence dissemination. Communication is easier, faster and cheaper and above all: more diverse (Kohli, 2017). Extensive reports with illustrations and pictures can be sent in a matter of seconds.

The last step is *responsiveness*. When adequate information is generated and it has been disseminated throughout the organization properly, it is time to respond. Responding ranges from using customer intelligence in selecting target markets, developing and designing new products that cater to the current and future needs of customers and producing, distributing and promoting the products in a way that evokes a favorable end-customer response (Jaworski & Kohli, 1990). A certain classification of organizations can be made in the level of responsiveness of these organizations. An organization can be *market-driven,* be *driving markets,* or be both (Jaworski, Kohli, and Sahay, 2000). A market-driven organization listens, learns, and responds to the market within its current structure. These organizations are literally driven by the market. They accept their market segment and competitors as given and are not actively changing it. On the other hand, some organizations are driving the market. These organizations actively shape the market structure and the players in their markets. Players in the market can be customers as well as competition or partners. An example of modifying the players in a market is by integrating distribution into your value chain, called the functional-modification approach, or getting new players to enter the market, called the construction approach (Jaworski et al., 2000). Digitalization has improved the responsiveness of organizations. It again makes responding easier and faster. Also the possibility of personal targeting of online advertisements came to be (Kohli, 2017).

2.2 HOW ARE SMALL FIRMS DEFINED?

Now the concept of market orientation is clear, it is important to understand what characterizes a small firm. Most microbreweries in The Netherlands are small enterprises with few employees and have no additional specialists in their business. This has implications on how they do business. The importance of these micro firms for the economy in The Netherlands, is reflected in the number of micro firms and small and medium-sized enterprises (SME's). In 2019 there were 1.106.310 micro firms and 51.925 SME's in The Netherlands (Centraal Bureau voor de Statistiek). In this chapter, various specific characteristics of small firms are discussed to understand what differentiates them from large corporations.

Small firms are not just little big businesses that do the same thing as big firms, but just on a smaller scale. Often the management style, objectives, and scale of operations are particular for these small enterprises. Before looking into management style and the use of marketing, a way of defining small firms is given.

There are two ways of defining small firms. First, there is a definition that focuses on more quantitative attributes such as size. This definition varies over continents and countries. Carson (1990) mentions the definition given by the Committee for Economic Development (CED) from the United States. In this definition a small firm must at least possess two of the following characteristics:

1. Management of the firm is independent. Usually the managers are also the owners.
2. Capital is supplied and the ownership is held by an individual or a small group.
3. The area of operations is mainly local, with the workers and owners living in one home community (an area in which a group of people lives). However, the market need not be local.
4. The relative size of the firm within its industry must be small when compared with the biggest units in the field. This measure can be in terms of sales volume, number of employees or other significant comparisons.

A more formal way of using quantitative requirements to classify firms, is by looking at their profit and number of employees. In The Netherlands, the following numbers are decisive of whether a business is micro, small, medium-sized, or large (Kamer van Koophandel, KvK):

	Micro	**Small**	**Medium**	**Large**
Assets	< € 350.000	€ 350.000 - 6 million	€ 6 - 20 million	€ 20 million
Net profit	< € 700.000	€ 700.000 - 12 million	€1 2 - 40 million	> € 40 million
Average number of employees	< 10	10 - 50	50 - 250	> 250

Table 1. Classification of firms by assets, net profit and average number of employees (KvK, 2016)

The numbers in table 1 may differ across countries, but these numbers are leading since this paper focusses on The Netherlands,.

As numbers do not always give an effective representation, it is also possible to identify small firms by assessing more qualitative attributes. The five attributes mentioned by Schollhammer and Kuriloff (1979) have some similarities with the definition given by the CED mentioned above, but a fifth attribute is added which focuses on the management style.

So, besides the attributes *Independence*, *Ownership*, *Scope of Operations,* and *Scale of Operations* which respectively resemble the four characteristics given by the CED, a fifth aspect of defining small firms is given called *Management Style* (Shollhammer and Kuriloff, 1979). This is an essential attribute, since this is, besides size, possibly one of the biggest differences between a small and a large firm. Managers in small firms tend to be generalists and not specialists and they often manage in a personalized and more informal way. Micro and small businesses prefer an informal management style (Matlay, 1999). Meanwhile, managers of medium-sized and large businesses prefer a professional management style (Matlay, 1999). There tend to be a small number of employees in small firms, which makes it possible for managers to know all of them personally and be able to communicate with their subordinates personally, in a way that suits both parties best. This informal management style is also reflected in the recruitment of new employees. Owner/managers in small firms often recruit new employees through family members, friends, and existing employees (Matlay, 1999).

Finally, it is typical for managers in small firms to participate in all aspects of managing the business. Since there are no specialists available in their business, managers have broad knowledge that combined can make the firm thrive. Strategic decision making is concentrated mostly in the hands of the owners, who are more independent than large firm managers. These managers often have to please shareholders and stakeholders that are invested in and benefit from the company. Managers in small firms are limited because of resource-constraint issues. This affects the options managers in small firms have regarding decision-making. It requires employing unique management styles which strongly leverage personal authority and creativity (Covin & Slevin, 1991).

Another area in which managers in small firms differ a lot from managers in large firms, is marketing. Especially the attitude towards marketing is different. Small business managers often perceive marketing as a cost (Carson, 1990), which is partly a consequence of the limited financial resources small firms have to deal with. Resources are 'all tangible and intangible assets that are tied to the firm in a relatively permanent fashion' (Brush, Greene, Hart, 1997) and 'are essential to the growth of small firms' (Greene, Brush & Brown, 1997). Greene et al. describe five resource categories of small firms:

1. Human: all individuals within the organization
2. Social: relationships and networks
3. Physical: tangible assets necessary for business operations
4. Organizational: systems (from management systems to quality control systems), firm's structure and routines)
5. Financial: available money and access to funds

Managers consider *physical*, *organizational* and *social resources* to be most important. For small firm managers, possessing equipment and having unique products/services is especially important. Another important asset are networks. These were viewed as crucial for small firms (Greene et al., 1997), which is also underlined by Carson (1995).

A part of these limited resources characteristic for small firms, is the lack of expertise in these firms. In contrast to large corporations, small firms do not have access to specialists. Marketing expertise is often the last of the business disciplines to be acquired by a growing company, after finance and production specialists (Carson, 1990). This results in using marketing as a professionalized tool only in a later stage, when the firm has grown and there are more employees and more sales. Due to the lack of specialists, managers have to perform tasks they are not experienced in. The managers have to learn by doing because of this, and they experience a continuous development of knowledge related to areas of business they previously were not familiar with (Grant, 2001). This results in broad knowledge and all-round capabilities.

Another typical characteristic is the limited impact small firms have on the marketplace. While big corporations can use mass advertising and thus reach a large number of consumers to promote their products, small firms' impact on media through advertising and publicity will be almost negligible

(Carson, 1990). A consequence of this is, that small firms will have to be more creative with their marketing so that they are still able to reach their target customers. With the rise of the internet and digital marketing, this has become easier for small enterprises. A reoccurring theme in digital content marketing is customer value and the customer journey. Value is created through digital media (Rowley, J., 2008). It is, however, hard for SME's to keep up with the continuous developments that digitalization brings. SME's do not fully exploit the new media and do not apply the full potential of the new digital tools. This causes them not to fully benefit from them (Taiminen, & Karjaluoto, 2015)

The characteristic is the big influence of the owner/manager throughout the organization. Many firms have someone in the organization that plays such a dominant role in shaping the organizational culture that his or her role is decisive. This person is called the culture carrier. In a small firm, the owner is often the culture carrier (Leppard, 1987). What this culture carrier thinks or beliefs affect everything in a small firm, also the acceptance of marketing. If the owner of the small firm is an advocate for investing in marketing and advertising, chances are that the company will indeed invest time and money in this area.

Despite all these limitations that restrict small and medium-sized enterprises, they still successfully use marketing to generate sales (Geursen, 1997).

2.3 WHAT IS A MARKET ORIENTATION IN SMALL FIRMS?

The limited resources typical for small firms discussed in the previous chapter, affect almost everything in the business. From management style and decision-making to marketing. Small firms cannot compete using economies of scale, so their competitive advantage lies in the development of innovative products or processes, which relies on accurate market and customer information (O'dwyer, Gilmore and Carson, 2009). How small firms collect this information and how they can use it is discussed in this chapter.

Market orientation has a positive influence on profitability (Narver and Slater, 1990). This has also been proven for small firms in particular. It affects relative product quality, new product success, and profitability positively (Pelham, 1995, 1996) and there is a positive relationship between the use of environmental information and small firm performance (Dollinger, 1985).

Many aspects of market orientation apply to small firms too, with exception of interfunctional coordination. Since many small firms do not have departments and the owner/manager does most of the decision-making (Carson, 1990), interfunctional coordination is not necessary for small firms (Smeltzer, Fann, Nikolaisen, 1998). The limited resources also influence market intelligence generation. Bounded by financial restrictions, it is hard to generate market intelligence. Specific specialists often cannot be attracted. Small firms consult personal sources, rather than impersonal sources. Personal sources are sources the firm has direct contact with regularly. The most prevalent ones are family and customers (Smeltzer et al., 1988). A second way to gather market intelligence is by participating in communication activities. Interacting and participating in social, business, and trade activities will result in the gathering of information (O'dwyer et al., 2009). Written secondary data like magazines and journals, are also a way to gather market intelligence (Smeltzer et al., 1988). The big source called the internet is also a way for firms to gather market intelligence (Kohli, 2017).

The dissemination of the generated market intelligence is not a relevant issue for most small firms. The owner makes the major decisions in small firms (Verhees & Meulenberg, 2004). This has again to do with the fact that there simply are no different departments in small firms to which the information should be disseminated.

Since the owner of small firms often is the decision-maker, quick decisions can be made. This enhances the responsiveness of the firms (Verhees & Meulenberg, 2004). Decisions regarding advertisements, sales promotion or development of new products do not have to be approved by a whole board of directors or the shareholders. This enables small enterprises to continuously adjust their current activities and differentiate their products from the standardized offerings of the larger firms (Cummins, 2000).

Limited financial and technical resources constrain the responsiveness though (Verhees & Meulenberg, 2004). The small firm may have generated useful market intelligence regarding the changing preferences of their customers, but if there are no available funds to invest in the required resources, the responsiveness remains low. With the rise of the internet and digitalization, the costs of online marketing have decreased. This enables small firms to improve external communication (Barnes et al., 2012). But as stated before, SME's have a hard time fully taking advantage of the new digital tools (Taiminen, & Karjaluoto, 2015).

Since this research is about small firms, the focus will be on customer orientation, competitor orientation, market intelligence generation, and responsiveness to this intelligence.

3 THEORETICAL FRAMEWORK

To make the discussed theories and literature applicable for this research about microbreweries, the broad literature needs to be framed in a way only the necessary subjects return. This chapter reviews the parts of market orientation that are relevant to the research question:

"What aspects of market orientation are used by Dutch microbreweries?".

In the literature study of market orientation, some interesting concepts are discussed which are useful for small firms. Concepts from the various definitions discussed earlier in the literature review will be made applicable to this research (see image 2).

The behavioral components of Narver and Slater are quite appropriate for this research. From the work of Jaworski and Kohli, the intelligence generation and responsiveness will be used. One of the most prominent subjects of market orientation is customer orientation (Narver and Slater, 1990). For small firms, it is particularly important to be customer oriented. Satisfying the needs and preferences of the customers, is key to the survival of the firm. It is possible to adjust certain aspects of products and services in the short-term because of the ability to make quick decisions. The owner/manager of the small firm can therefore provide superior value to its market. This is not possible for larger firms, which mainly rely on economies of scale. For the manager of small firms to provide this service for its customers, market intelligence must be generated (Jaworski and Kohli, 1990).

Information about the current and future needs of customers is crucial in customer orientation. This paper focusses on microbreweries. Due to the financial restrictions small firms experience, different ways of gathering this market intelligence have to be conducted. Personal sources are important, rather than actual market research. Microbreweries are expected to generate customer information by informally talking to their customers. By participating in social events like beer festivals, direct contact with beer enthusiasts is guaranteed. Internet and social media are also expected to be sources of information. Furthermore, owners of microbreweries might test new products on a small scale first. By gathering a small group of key customers and asking their opinion gives an insight into what the market desires. Finally, customer intelligence is expected to be gathered through retailers. Since the shops in which the beer is sold is closer to the end-customer, they get first-handed information about the wants and needs of consumers.

Next to investigating whether microbreweries are customer oriented, the dichotomy between customer-led and market-oriented will be applied. This is the difference between:

1. Merely responding to the current needs and current markets, or

2. Actively investigating trends in preferences and looking at how to react to that in a way that in the future customers will also be satisfied with your product.

The next behavioral component that applies to market orientation in microbreweries, is the competitor orientation (Narver and Slater, 1990). The understanding of the strengths and weaknesses of the key current as well as future competitors is important to small firms. These key competitors serve the same market. Knowing what their current and future capabilities and strategies are can influence the way a small firm serves its customers. This way microbreweries can investigate what their competitive advantages are and exploit these qualities. Also competitive disadvantages can emerge from this competitor orientation. This calls for improvement if certain disadvantages appear. Same as with the customer orientation is the gathering of intelligence inherently connected to the competitor orientation. Gathering competitor intelligence is expected to be harder for microbreweries. However, a way for managers to gather information about their competition is by talking to suppliers of ingredients or brewing equipment. Chances are that they have connections with other breweries too. This way an insight is gained, into what certain ingredients and technical equipment the competition uses. Managers can also visit competitors and go on excursions. At last, it is expected that microbreweries do not view each other as pure competition, but more as competitive colleagues. So there might be a more informal way of sharing information than in bigger firms.

Besides gathering market intelligence regarding the customers and competitors, the most important aspect of market orientation is the actual responsiveness to the information. “Responsiveness is the action taken in response to intelligence that is generated and disseminated” (Jaworski and Kohli, 1990). In this research is the dissemination of market intelligence ignored, since this does not apply to small firms like microbreweries. Small firms are often managed/owned by one person, which is also the decision maker. This makes dissemination unnecessary. It enhances the responsiveness compared to large corporations, because quick decisions can be made (Verhees & Meulenberg, 2004). The last behavioral component, called interfunctional coordination, is ignored for the same reason. Small firms like microbreweries often simply do not have multiple departments or functions, so this component is unnecessary in this paper.

The responsiveness of microbreweries is expected to be reflected in making adjustments to the marketing mix (McCarthy, 1979). Designing Product, Place, Promotion, and Price (the 4 P’s) in a way that suits your market best is a way of providing superior value to your customers. An example is developing new recipes. With the gathered intelligence concerning the competition, adjustments to the business can be made too. Investing in new equipment like a canning line or a more energy-efficient mashing tun.

The last point that will be investigated is performance. Multiple studies point out the positive relationship between market orientation and performance in small firms (Pelham, 1995, Dollinger, 1985). In this research performance/profitability will be viewed as an outcome of, rather than a component of market orientation. What performance entails for microbreweries might deviate from just simply making as much profit as possible. Performance is expected to differ between microbreweries. Some will see survival as good performance, while others just want to experiment and make new beers. This is why performance will be measured subjectively, instead of sales figures.

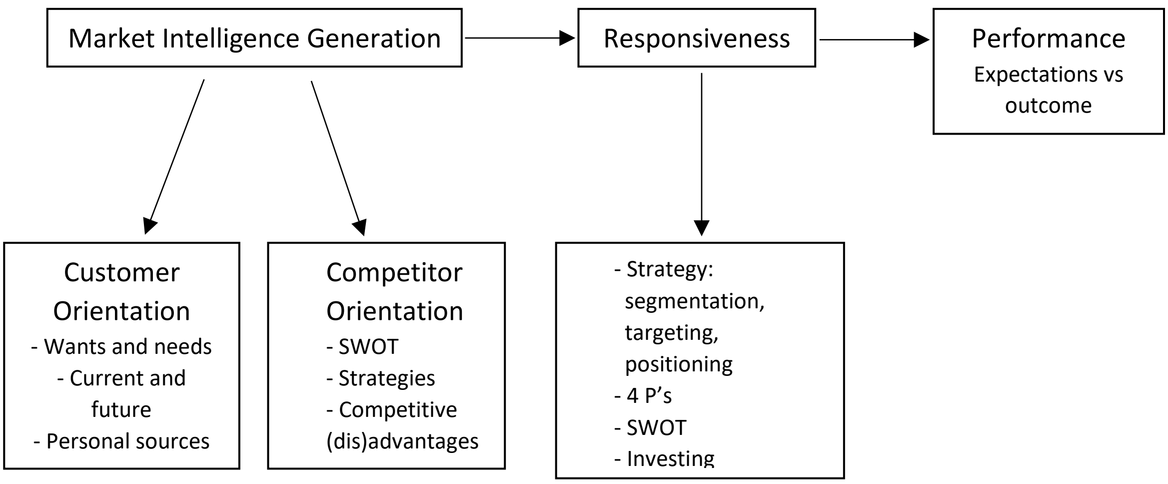

Image 2. Relevant concepts from the theoretical framework

4 METHOD

Qualitative research

In this research both a literature study as well as field research is conducted. To investigate whether microbreweries in The Netherlands are market oriented, qualitative research is conducted. The goal is to find a deeper understanding of whether market orientation is present in these firms. This is done through qualitative interviews. How market orientation is used, and which aspects of market orientation are present in microbreweries are the main themes. Also, through qualitative interviews new insights can emerge that would not be revealed through quantitative surveys. Since the literature was studied before doing interviews, a strong idea of what kind of themes would emerge during the interviews was present. This is why this research has a deductive approach.

Participants

A list of 159 microbreweries in Noord-Brabant was used in selecting the participants. A random sample of six breweries was drawn from this list of microbreweries. Gypsy brewers (breweries that do not own a brewing installation themselves, but use the installation of other breweries) are also included in the sample. This is done since there is no reason to assume that they are not in charge of their marketing. The area Noord-Brabant is chosen for convenience, and since there is no reason to assume a difference in answers, this is generalizable to The Netherlands. Microbreweries are defined as independent firms with a few employees that mainly serve the local market. The breweries in the sample were founded between 2007 to 2018. The capacity of the participants of one brew varied between 50 and 12.000 litres. The interviews were held one-on-one through video call (due to the coronavirus rules) in the exception of one interview which was done in real life. The interviews were in the Dutch language with the owner/manager of the brewery.

Design

The firms were first contacted by phone or e-mail to assure participation. The interviews are semi-structured in which a predetermined interview guide was used. This contains a list of open-ended questions and topic areas that should be covered. The questions can be asked in different orders. Supplementary questions can be asked throughout the interviews to clarify certain subjects or follow up on other interesting comments made by the interviewee. This way is the interview structured, while there is also room to go in-depth into certain subjects. The theoretical framework is divided into five main themes. These themes emerged from the subjects of market orientation that apply to this particular research. The themes are: Customer Orientation, Competitor Orientation, Intelligence Generation, Intelligence Responsiveness, and Performance. Each theme has multiple questions that together give a broad insight into that specific theme.

Questions

The first question: "What was the reason to start a brewery?" is asked to make the interviewee comfortable and get an insight into the background of the interviewee.

- *Theme 1. Customer Orientation*

To gain insight into the first theme, *Customer Orientation*, multiple questions were asked that are understandable for the interviewee. The questions address whether the interviewee thinks he is customer oriented. The first question: "Are you customer oriented?" is asked for a later comparison between perceived customer orientation and actual customer orientation and to see whether there is a gap between the two (Jaworski and Kohli, 1990). The follow-up question is: “How are you customer oriented?”. This question dives deeper into the level of customer orientation of the brewery. This question yields insight into what the interviewee does to be customer oriented.

To figure out what information the interviewee knows about his customers the questions “Who are your key customers?”, “Where do you sell the most?”, and “What do you know about the wants and needs of your customers?” are asked. “Do you target specific groups of customers?” is asked to gain an insight into whether the interviewee knows that customers might have different wants and needs and how he might target those differently (Narver & Slater, 1990).

To see whether the interviewees see the bigger picture regarding their current and future market, and follow the changes in their market, the following two questions are asked: “What was the biggest change in your market in the last two years?”, and “What is the biggest change awaiting you in the beer market?” (Narver & Slater, 1990, 1998).

- *Theme 2. Competitor Orientation*

The second theme, *Competitor Orientation*, starts similarly by asking “What are your key competitors?”. This question is asked to gain insight into how competitor-focused the interviewees are and if they know who serves the same market as they do.

The follow-up questions “What do your competitors do?”, and “What is the strategy of your competitors?” are asked to deepen the level of how interested they are in their competitors (Narver & Slater, 1990).

The questions “How do your competitors steal away your customers?” and “What are their advantages compared to you?” are asked to see if the interviewees are interested in the strengths of their competition and to see if there is a level of reflection present (Narver & Slater, 1990, Lafferty, B. 2001).

The questions “What are your strongpoints compared to your competitors?’, “What are your advantages compared to your competitors?” and “What do you offer your customers that your competitors can not?” are asked to see if the interviewees know what their strengths entail and if they know how they can use that.

To see whether the interviewees see the bigger picture regarding their competitors and follow the changes in their competition, the following two questions are asked: “What was the biggest change in competition in the last two years?” and “What is the biggest change in competition that awaits you?” (Narver & Slater, 1990, Narver & Slater 1998).

- *Theme 3. Intelligence Generation*

In this theme, the two types of intelligence that are needed in a market oriented business are investigated. Questions are asked to figure out how breweries gather information about their customers and competitors. “How do you collect information about who your customers are?” and “How do you collect information about the wants and needs of your customers?” are asked to see what tools the interviewees use to generate customer intelligence. Both question have a follow-up question to specify this: “What tools do you use to gain this information?” (Jaworksi & Kohli, 1990).

The question “How do you stay up-to-date with your customer information?” is asked to gain insight into if the generating of customer information continuously.

Then the questions: “How do you know who your competitors are?” and “How do you gather information about the strengths and weaknesses of your competitors?” are asked. This is also asked to gain an understanding of what tools the interviewees use to generate information, in this case about their competition. Both questions have a follow-up question to specify this: “What tools do you use to gain this information?”

- *Theme 4. Intelligence Responsiveness*

In fourth theme, *Intelligence Responsiveness*, the actual action taken by breweries following the information is investigated. Both customer and competitor information is needed to respond to the market in a market oriented way. The question “How do you adapt to the wants and needs of your customers?” relates to the responsiveness to customer intelligence and what actual action is taken to serve the wishes of the customer. The question “How do you react to your competitors?” relates to the responsiveness to competitor intelligence. The last question of this theme is: “How do you respond to the changes in your market?”. This question is asked to gain insight into whether the interviewees respond to bigger market changes (Jaworski & Kohli, 1990).

- *Theme 5. Performance*

The last theme, *Performance*, is important because it can be used to investigate whether a more market oriented brewery has better performance. The first question of this theme: “What were your goals when you started with the brewery?” is asked to assist the next question. “To what extent did you achieve these goals?” (Kirca et al., 2005, Jaworski & Kohli, 1993). The choice for this subjective measure of performance was made because each interviewee may have different goals or intentions. Comparing objective measures of performance like sales or growth may not reflect well when the strategy is completely different. A brewery can be non-profit or is seen as a hobby for example. Sales and growth would not reflect their performance well. Whether a brewery reached its goals reflects this better. Ultimately this gives a sense of whether being more market oriented influences achieving goals.

The interviews last between 40 minutes and two hours and new interviews were held until saturation was reached and no new information is obtained. They were held at the location of the brewery’s choice. In most cases, this was online through a video call. Skype, Zoom, and Microsoft Teams were used. Respondents’ answers are anonymized so no answers can be traced back to a certain respondent.

Analysis

The interviews were recorded and transcribed. Then a thematic analysis is conducted. The transcripts were encoded first by open, then axial, and finally selective encoding. The software Atlas.ti was used for this process. The first step, open encoding, is the labeling of each interesting text fragment. This way, the interviews are made up of different labels. Each interview was encoded after the other and, in between, previous interviews were read again and encoded with the newly encountered codes when necessary. All text fragments that belong to the same labels are put together. After this follows step 2: axial encoding. All the text fragments and labels are compared in this part. Some labels might get deleted or new labels can emerge. Labels can also merge into main labels and divided into sub labels. Text fragments can move between labels too. In the last step, selective encoding, is all the data assigned to a label. All quotes with the same label are collected.

All relevant labels fit in certain themes. Five themes in total emerged in which these relevant labels were placed. After that relationships and connections in each of these themes were made and ultimately a theory was built up.

All relevant comments made by the interviewees are covered by five themes, that then were analyzed to determine the level of market orientation in microbreweries. Each relevant theme is addressed. This will include examples taken from the transcripts of the interviews to reinforce the point made. The quotes were translated into English in the most precise way possible. The original text fragments and translations were compared by the author and two other readers to ensure a good and objective translation.

These results were finally compared to the results presented in the existing literature.

5 Results

After transcribing, coding, and analyzing the six qualitative interviews, all relevant codes were placed in one of 5 themes that initially emerged from the literature and were reflected in the answers given by the interviewees. The results will be presented according to these five themes, which correspond to the sub-questions. These are the themes:

1. Customer orientation
2. Competitor orientation
3. Intelligence generation
4. Responsiveness
5. Performance

After each theme, a summary follows, which answers the sub-question in short. At the end of this chapter you can find a table (see table 2) in which the important features of each respondent are visible.

5.1 Customer orientation

Four out of six interviewees explicitly state that they are customer oriented. A common answer is "Yes, I have to sell the beer, so I have got to be customer oriented". The follow-up question regarding exactly how they are customer oriented resulted in different answers. Three out of six interviewees state that they segment the consumers in a way that makes it clear for them who their target audience is. They use a variety of ways that come down to ABC analysis of customer segmentation. In this analysis is customer segment A the most important group of customers and C the least important group of customers. One of the interviewees said: "I segment my sales in categories. This ranges from important customers who buy large volumes, to those with less volume, and finally the C's. This is also how I divide my time, of course." The other three interviewees state that their target customer is just anyone who likes a craft beer.

One interviewee confirms the customer segmentation by giving a precise description of his target audience by reading aloud a segmentation research he conducted. The interviewee has the description of age, family status, income, educational attainment, and ethnicity.

All six interviewees emphasize the importance of the quality of their product and the effect quality has on the image of the brewery. "I think it is important for a brewery to keep the quality high. The product has to be of a constant quality … That is an important point because a lot of breweries are quite precarious in the quality of their beers. If a beer is disappointing, you will lose customers."

One interviewee makes a connection between quality and a second important feature a brewery can use to influence the image: storytelling and how people experience the product. "I have learned that it is not only about the taste, but the entire image and story around it are important. It is all about the experience, total experience. … So, we try to think about the names of beers in a way that the people get the story behind it." Five out of six interviewees explicitly confirm this aspect. A way of putting this in practice is by connecting recognizable features in the label or name of the beer.

A crucial aspect of customer orientation, is knowing the wants and needs of your end-user. All six breweries have some general knowledge about the preferences of their customers, but no one has an exact preference-profile.

A preference that most interviewees underline is that consumers have a thirst for novelty. This often does not align with their strategies or capabilities as will be seen in theme four (Responsiveness). An interviewee: "I know that the consumers in craft beer shops are almost always people that are in search of trying something new.", and another interviewee "Here you can seduce people every day with a new craft beer. … It is different in Belgium." This also has its effect on customer loyalty, which is hard to accomplish with these experimental consumers. These one-timer buyers only buy your beer once and then move on to the next one. This is reflected in the following comment made by an interviewee: "I develop maybe one beer per year. Instead of my core range, the experimental drinker chooses the new beers that other breweries constantly bring to market."

The retail and hospitality industry also represents a big part of the customer-base of breweries. Four out of six breweries underline the importance of these customers. These interviewees state that maintaining a good relationship with these customers is important to stay interesting to them "The hospitality industry can only sell so much different beers … the relationship is really important, what you can do for each other and if you like each other. So that is a lot of maintaining relationships, that costs a lot of time."

The interviewees have a global knowledge about where their products are sold, but only up to a certain level. Four of the six interviewees state they know who their retailers and selling venues in their region are. A reason that comes up with three of them is the fact that they distribute their product themselves: "I do not work with a wholesaler. I do everything myself, so I know where I bring my products.", and "We mainly sell in our own region. We often deliver our beers ourselves, which is an advantage of our small circle. We deliver the orders with a van."

The moment an external distributor gets involved in the process, this knowledge decreases and the interviewees often no more know where their products are sold exactly. An interviewee describes this in the following way: "Our distributor delivers way more of our products than we do. I just do not know where my products end up. Sometimes I get messages from people saying that they bought my beer in a place in which I did not even know our beer could be bought."

5.1.1 Summary

The interviewees implement certain aspects of customer orientation in their policy. Most of them know who their customers and target audience are. Customer segmentation is used by half of the interviewees, in one case even up to the level of a precise description of their target audience.

The interviewees underline the importance of two factors that influence the image of their brewery. Quality, and Storytelling/How people experience the product. These two aspects are used to form a positive image of their brewery. With high quality and storytelling, they can satisfy their customers.

The interviewees have some knowledge about the preferences of their end-customers. Especially thirst for novelty is known as a preference of their customers. Craft beer drinkers like to drink new beers and are quite experimental consumers.

Also, the resellers of breweries, the retail and hospitality industry, are recognized as important according to the interviewees. They underline the importance of maintaining the relationships with these partners.

The interviewees know where their products are sold when they do the distribution themselves. The moment an external distributor is used, this knowledge fades.

5.2 Competitor orientation

The interviewees show different levels of competitor orientation. One particular aspect stands out. Five out of six interviewees state explicitly that they do not view the other craft beer brewers as actual competitors. Since they all operate in the same market, these interviewees state that large collegiality is present in the beer industry. Advice is given out freely between brewers and questions can be asked without hesitation. One interviewee gives an exceptionally fitting description: "The beer industry is actually really open and cooperative to each other, friendly. This applies to all aspects of the business. It applies to helping each other, being open to each other: I have got a problem, how do you do that? … It is quite different than in large companies. So, I view other brewers more as colleagues in the same market, from which I can learn a thing or two."

Most interviewees state that they mainly focus on themselves, and three of the interviewees state explicitly that they do not really know what their competitors do. An important aspect is that most interviewees state that they focus on their own strategy: "We all have our own character, our own style. We all have our own unique thing which is not easily copied. And there is no need to. The culture of not wanting to copy each other is very strong in the brewing industry, everybody just wants to do their own characteristic thing."

When the interviewees do look at their competition, the larger brewing companies are in three out of six interviewees not part of that competition. They focus on other microbreweries that are situated in their own region. These local breweries are stated to serve the same market and the same customers and thus are seen as competition. "I really do not see the large companies, or breweries, which mainly produce pilsner as competition. Breweries like Heineken or Hertog Jan. First of all: there is no competing them … and second of all: we do not target the same customers". Again storytelling is a part of this competition, especially in the region as the following interviewee states: "There are five microbreweries in my city including mine. The other four are of course competitors of mine because they have the same story as I do. They are also sold in the same places."

Because of the solidarity in the beer industry that the interviewees underline, they do somewhat know what their competitors are up to. Two interviewees question whether their competitor actually does have a strategy: "I know that almost no brewery has a marketing plan. There is no money to hire large marketing agencies. Also, that would not match with our image, our story."

Four out of six breweries do know the strengths of their competitors, which vary a lot. These strengths are so variable because each brewery compares its strengths and weaknesses to those of its competitors. This means that if an interviewee does not own a brewing installation of themselves for example, they state that a strength of their competitors is that they do own a brewing installation of themselves. Examples of mentioned competitor strengths are: more knowledge about the brewing process, and having an own brewing installation to cut costs and having a physical place (brewery & experience centre) for customers to visit.

An aspect that some interviewees are interested in is the presentation online and the design of labels of competitors. The interviewees state that they look at how competitors present themselves on social media and compare their own labels to the labels of the competitor "Does another label look cooler than ours? What could we do to improve? We are quite critical at that point. We are constantly improving our product and its appearance."

When asked about the changes in the market, five of the interviewees state that in the last few years a lot of new breweries emerged. These interviewees all state that the market is quite saturated now and they expect in the next few years a lot of breweries to stop voluntarily or go bankrupt.

This is illustrated by the following statement: "A lot of new breweries. We all think that we have reached a tipping point. There are plenty of breweries right now … We are waiting for the moment that breweries will stop. This will be accelerated by the corona crisis. We have 700 breweries in The Netherlands, that seems like an unhealthy amount."

What all six interviewees are aware of are their own strengths. Each interviewee knows what his brewery is best at and how he can exploit that. This also varies between breweries, but three themes stand out.

The first reoccurring strength is *quality*. This is defined as 'the end product should always have a constant level of quality'. Quality is perceived as a strength by various breweries and is valued highly. If a beer does not have the desired level of quality, it is not brought to market. As illustrated by the following interviewee: "We set high standards for our beer. If the quality is not good, I will not bring it to the market. Some breweries do bring it to market because of the costs they made brewing it. People that buy my beer essentially know it is good quality."

The second reoccurring theme is *storytelling*. The interviewees are aware of what makes them unique. Their story is an important part of their image and how customers perceive them. It makes consumers choose their beer over a competitive beer. As an interviewee states: "The brewery has been around for a very long time and people are interested in how it the brewery used to work. So it gives authenticity to our beer."

The third and last reoccurring theme is *having specialists in-house*. Since many brewers are jack-of-all-trades or have many befriended people that are willing to help out, there is no need to hire new expensive specialists: "As a team we have everything. Brewing knowledge, data-analysis, designing skills, social media, storage, location, and promotion. Most companies have to hire someone externally. These skills do not form large expenses for us."

5.2.1 Summary

The interviewees do not show high levels of competitor orientation. One thing that stands out is that the interviewees think it is more important to focus on their own business instead of looking at what their competition does. The interviewees all show that they feel like copying others is not doable or desirable. They want to do their own thing and hope they will satisfy their customers. When asked whom they view as competitors, the interviewees state that they view other local craft breweries as competition. Large beer producing companies are mostly ignored as competition.

Four out of six interviewees are aware of some strengths of their competitors and all six interviewees know what their own strengths are. Reoccurring stated strengths are the quality of the product, heir storytelling, and having low-cost specialists in their environment.

A change in the market that most interviewees are aware of is the market saturation in the beer industry. Many think that a lot of breweries are going to stop existing or go bankrupt.

At last, the interviewees do not view other breweries as actual competition, more as colleagues in the same market. This is represented in the way they communicate with each other and help each other in various ways.

5.3 Intelligence generation

The information about customers and competitors discussed in the previous themes is generated in various ways. This theme is split up in customer intelligence generation and competitor intelligence generation.

5.3.1 Customer intelligence generation

Four of the six interviewees state explicitly that they gather customer information. Mainly three sources are mentioned: personal conversations with customers, social media, and feedback from retailers and the hospitality industry are named as the most important sources of information.
Many interviewees state that they regularly *talk with their customers in a personal way* whenever they encounter them. This can be in their own venue, in bars, or on beer festivals.

A second way of generating customer information is through *social media*. It is both used as a way to communicate with the customers about their wants and needs as well as receiving feedback on their products. An interviewee expresses this as follows: "We are not afraid to ask questions on social media, such as: 'What would you rather have in a beer: this or that?', or 'Do you have any plans or ideas we could use?'."

Another way in which social media is used is to get feedback on their products. This is done through an app called Untappd. This is a social platform that revolves around beer. Users can search for beers, rate them on a scale of 0 to 5, and add comments to express their opinion about the beer. Four interviewees state that they regularly look at the ratings of their beers. An interviewee: "What I do a lot is looking at the ratings my beers receive on Untappd. The moment a beer gets an average below 3.5, I start to wonder whether my beer possesses the quality it should have.

Social media is also used to gain insight into who their customers are and what they like. A lot of information about people can be found in their social media pages: "We just look around a lot. There is a Facebook page where all craft beer enthusiasts of The Netherlands gather and that is exactly our target audience. We can literally see who these people are, what they do, and how old they are. … With just a little online research you can get so much information."

Social media platforms are checked regularly by the interviewees. This ranges from daily to weekly.

The third way of generating customer information is *through feedback from retailers and the hospitality industry*. Four out of six interviewees state that they get some kind of feedback from these resellers. This can be in the form of sales information or whether consumers ask for their beer. The information is gained by personally talking to the owners of shops and bars. An interviewee says: "We get feedback from the venues in which we're sold and from retailers. They tell us what sells well and whether people ask for our products."

Since beer festivals were mentioned by five of the six interviewees this is also worth mentioning. Through beer festivals, personal contact with customers is guaranteed. The interviewees use these festivals to interact with customers and sometimes even test out products. As illustrated by the following statement: "That is how our porter came to be. We brewed three types of porter and took those to festivals. We let customers taste these three types and asked which one they liked best. In the end, we brought their favorite to market."

Two out of six interviewees state that they sometimes use this kind of tasting in decision making, although not always during beer festivals. Some state they have a taste panel which they consult sometimes. "I have a select group of people which I use as a test panel and ask them what they would want to see in a beer", and "Occasionally I do let a small group taste something, but that's mainly when we have doubts about it."

5.3.2 Competitor intelligence generation

This is done in various ways. Three reoccurring information generation techniques are present in the answers of the interviewees. These techniques are discussed in the following order: personal contact with competitors, looking around in shops, and social media.

First, *personal contact with competitors*. The interviewees view their competitors more as colleagues, as stated in the second theme. Because of this friendly interaction between breweries, a lot of information is shared. This is reflected in the following statement: “We are allowed to ask anything to anyone. For example: Brewery X helps us, Brewery Y helps us. If we have any questions we can ask all of them. That is super cool. … We just have a lot of brewers around us which we can ask to help us with for example the brewing process”. The information can also be gathered by visiting competitors and looking around their brewery.

A second way of gathering competitor information is by simply *looking around in shops and hospitality venues*. Seeing which beers are presented next to yours can give information about your competitors. How they present themselves and how they are priced for example. Four interviewees explicitly state that they look around in shops to generate competitor information: “We often just visit a shop or hospitality venue. Then you will see what fills the shelves. Sometimes I ask which beers are selling fast and which do not.” This is not only done in physical shops, but information can also be gathered from online shops: “Since last week I have a webshop and since then I look at other webshops a lot. Seeing how they go about that.”

The last common way of gathering competitor information is through *social media*. Both looking at what consumers buy, drink, and review as well at the posts of the competitors themselves. “You can see who your competitors are on social media. Just by looking at what people buy and how they review those products is a way of deciding who are our real competitors.”, and “We keep an eye on the social media of our competitors, seeing what promotional campaigns they come up with and do.”

Three out of six interviewees state that they do not actively search for information about the strengths and weaknesses of their competitors.

5.3.3 Summary

<u>Customer information</u> is gathered in various ways by the interviewees. Most interviewees state that they actively gather customer information. Three important sources of customer information are mainly mentioned:

1. Personal conversations with consumers: talking personally with customers is an information source for the interviewees. Beer festivals are named especially as places where this is often done.
2. Social media: through social media, a lot of information is gathered. Information about who the customers are, what they want, and what they think about the products is easily accessible. Untappd is named as a platform that is used frequently to gather information about the preferences of customers.
3. Feedback from the the retailers and the hospitality industry: by talking to these customers some information about sales and who their customers are is gathered.

<u>Competitor information</u> is mainly gathered by: personal contact with competitors, looking around in shops, and social media.

1. Personal contact with competitors: as stated in the theme competitor orientation, the interviewees are very collegial with their competitors. This is the reason that competitors are used frequently as a source of information. Brewers help each other in various ways.
2. Looking around in shops: by looking around in shops and hospitality venues an idea of is formed of who your competitors are. The interviewees look at what is on the shelves and what bars have on tap.

3. Social media: same as with customer information, social media is frequently used as a way of generating competitor information. People post what they drink, how they rate it and what they think about it. By looking at these posts information about the competition is generated.

5.4 Responsiveness

When asked how they respond to the information they generate, a range of answers is given. Some patterns are visible though. Especially one thing stands out. The general idea of the interviewees is that they can listen and act on the information their customers give them, but rather stick to their own approach. The code '*Sticking to their own approach'* was one of the most occurring codes in the interviews (31 times). All six interviewees state that they want to do their own thing, before listening to the wishes of their customers. The level of this varies between the interviewees. Some react to a greater extent, some less. The word *stubborn* is used by various interviewees to describe themselves.

The way the interviewees respond to the preferences of their customers ranges from not at all: "We react very little really. That says a lot about my stubbornness. I am not going to make my IPA less bitter because people think it is too bitter. It should be bitter, that's the way it should be.", to up to a certain level: "It is impossible to fully adjust to the wishes of your customers, but we do really listen. If a lot of people say that our beer is pretty good, but the mouthfeel is a little thin, we are not going to say that we do not care and bring it out again. We will investigate how we can ensure that it gets a fuller body. … We just want to ensure that everyone completely loves our beers."

Many interviewees confirm this and state that they are willing to adjust their product, but only up to a certain level. It has to fit their image, own taste and the quality must be guaranteed. All the interviewees confirm this idea, which is reflected in the following statement: "On the one hand we really do want to listen to what our customers have to say, but on the other hand we do want to do our own thing. It has to fit right up our alley." The interviewees confirm this multiple times. When a customer preference does not align with the image of the brewery, it is disregarded.

Two of the interviewees state explicitly that they sometimes change the recipe of their product to serve the preferences of the customers best. The other four state that they don't. This determination of own strength is reflected well by this interviewee: "The beers should just be good in my eyes, be right, and then I just hope the consumer likes it too. … I come up with the recipes myself, and if I think it is good I will work with it. I am more important than my customer in that way."

The microbreweries have a hard time fulfilling the thirst for new beers that consumers have. Many customers rather try a new beer than buying one they have already tried. Because of limitations in equipment or money, the microbreweries sometimes have a hard time responding to this preference as the following statement illustrates: "Because people choose for a new beer, competitors do take some of my customers. This is because I develop maybe one beer per year."

None of the interviewees state that they respond to their competitors. The code *'Sticking to their own approach'* is very clear in this part. The interviewees' idea is that they mainly just want to do their own thing and do not focus on the strategy of their competitors. They state that every brewery has its own story, characteristics and way of doing business and that there is no interest in copying this from each other. This would harm the image and would not fit within their storytelling. It is reflected in the following statement: "We all have our own character, our own style. We all have our own unique thing which is not easily copied. And there is no need to. The culture of not wanting to copy each other is very strong in the brewing industry, everybody just wants to do its own characteristic thing." The only way an interviewee responds to the competition is by looking at their labels and reflecting on whether it is more or less attractive than their own labels.

The last aspect breweries can respond to, are changes in the market. In every market there are trends and changes in preferences. What is very clear in the answers of the interviewees is that this information is not really responded to. Most interviewees are averse to trends and do not want to follow them. Again, *'Sticking to their own approach'* is very clear in this aspect. About responding to the market changes, the following statement is made: "We try to react as little as possible. We are not a trendsetter, but we also do not want to follow trends. We try to do our own thing with our way of doing business. … So we are more of exploiting our own strengths rather than following other trends. Fuck trends! Everyone does their own thing, and so do we."

This aversion against trends is reflected in other comments made by interviewees too. When a trend does not fit the idea or image of the brewery, it is disregarded immediately: "We do not follow trends. Look at the hype about alcohol-free or IPA's for example, we do not even do anything with that. We only do what we want to do. We won't make IPA's. Suppose the market only wants alcohol-free beer, that sucks for us because we will not make that."

Four out of six interviewees did explicitly state that they stopped or started brewing less beer during the coronavirus crisis.

5.4.1 Summary

The responsiveness to customer information varies a lot between the interviewees. Some do not respond to the information at all, while others do. One shared thought is present in almost all interviews: the interviewees can listen to their customers, but rather do their own thing. When the interviewees do respond to their customers, it has to meet three requirements: it has to fit their image, own taste, and the quality must be guaranteed. This approach is different from marketing orientation. It revolves around creating and developing new products that align with the brand identity. More important: it protects the brand identity. In brand orientation should not only actions taken by an organization provide the customer with superior value, it should also fit with the brand identity. The brand itself is seen as an important resource (Urde, M., 1999).

Most interviewees do not adjust the recipes of their beers according to feedback. Two interviewees do.

The responsiveness to competitor information is quite clear in the interviewees. The interviewees do not respond to competitor information. They all state that they focus on their own strengths and characteristics and feel like their competition does that too.

Responding to market changes is also done to a minimum. There is a general aversion against trends and the interviewees rather do their own thing. However, most interviewees did actually reduce the amount of brewing since the coronavirus.

5.5 Performance

The last theme discussed in each interview, was the performance of the brewery. The interviewees were asked what their goals were when they started and whether those goals had been achieved. This way a review of their performance can be given, without the interference of individual strategies: did they achieve their goals or did they not achieve their goals?

Four out of six interviewees state that when they started, they did not have any very well thought out goals for their brewery. Most interviewees just thought of it as a hobby and wanted to explore that. As this interviewee confirms: "We had minimum goals. Just brewing a beer, bring it to market, and see how it goes. No goal at all. As a hobby."

Four out of six interviewees talk about brewing as a hobby. Most of the time, this is part of the goals these interviewees had when they started. Having fun with the brewing and keeping it a hobby: "We still have fun, and as long as we keep having fun we achieve our goal. And that is just brewing good beer for people and having fun while doing it. I think that's a beautiful goal as a hobby."

What's also visible in the last quote is that quality is part of their goal. Keeping the quality of their products high. This occurs in four out of six interviewees: "The most important thing is that the quality is always good."

Again, four out of six interviewees state that their initial goals had been achieved. In two cases this was not the case. They state that their goal had been partially achieved, but not entirely. They both express that this is because they were too enthusiastic when forming the goals. The next interviewee illustrates that well: "Our goals were higher than we have achieved. Turns out we were a little too enthusiastic. You could call that youthful enthusiasm. We hoped our beer would be widespread through The Netherlands by now. We overestimated our capabilities there. It turns out to be harder to be sold outside our region, in the rest of The Netherlands. That is difficult."

5.5.1 Relationship performance and market orientation

Given the various answers given by the interviewees, it is hard to find a relation between the level of market orientation of a brewery and the performance of that brewery. What is observable, is the fact that the two interviewees that did not achieve their goals formulated when they started, did not gather customer intelligence and had low responsiveness to customer information compared to the other interviewees. Next to that, they were not aware of the strength and weaknesses of their competitors (see table 2). These two interviewees might know what their customers want or what their competition does, but do not respond to this information.

5.5.2 Summary

Most interviewees achieved the goals they formulated when they started. These goals were most of the time not very well thought out plans. Their goals consisted of keeping the quality high and having fun with their hobby.

Two interviewees did not achieve their goals. This was due to over-enthusiasm when formulating their goals at the start. These two interviewees also had very low responsiveness.

Respondent	**1**	**2**	**3**	**4**	**5**	**6**
Knows who customers are (segmentation)	x	x	x			
Knows preferences of customers			x	x	x	x
Knows where their product is sold		x	x	x	x	
Knows strengths and weaknesses of competition		x	x	x	x	
Is aware of own strengths	x	x	x	x	x	x
State they actively gather customer intelligence		x	x	x	x	
Gathers info about strengths/weaknesses competition	x		x	x		
Responds to customers			x	x	x	
Responds to competition				x		
Decreased brewing due to covid19	x		x	x		x
Achieved goals formulated at the start		x	x	x	x	

Table 2. Which respondent does what?

6 CONCLUSION

This research investigated what aspects of market orientation are used in microbreweries through qualitative interviews with the owner/manager of six different microbreweries. In this research, the following research question is answered:

What aspects of market orientation are used by Dutch microbreweries?

The interviews showed that some aspects of market orientation are present in the policy of microbreweries in The Netherlands, while others are not.

The interviews showed that most microbreweries are *customer oriented* in some degree. They know who their end-customers are and what their target audience is. Half of the interviewees use customer segmentation to focus on specific customers. The interviewees have some general knowledge about the preferences of their customers. Especially thirst for novelty is a known preference. Microbreweries are also aware of the importance of their other customers, the resellers: the retailers and hospitality industry. Maintaining a good relationship with them is underlined. The interviewees know where their products are sold when they distribute their products themselves. The moment an external distributor is used, this knowledge fades.

Image is viewed as important by the interviewees. Two factors in particular emerge: first Quality of products, and second Storytelling/How people experience the product. These are used to influence the customers' view of their brewery.

The interviews showed that microbreweries do not have high levels of *competitor orientation*. They emphasize the focus on their own capabilities. The interviewees do not view the large beer producing companies as competitors, while other local craft breweries are seen as competition. Four out of six interviewees are aware of some strengths of their competitors, but state that it is more important for them to focus on their own business. There is no desire to copy competitors. All interviewees are aware of their own strengths, mainly: the quality of the product, their storytelling, and having specialists in their own environment.

All interviewees emphasize the fact that collegiality is high in the brewing industry and that other breweries are seen more as colleagues in the same market than as competitors.

A change in the market that most interviewees are aware of is the market saturation in the brewing industry. It is believed that a lot of breweries are not going to make it in the next few years.

The *generation of customer information* by microbreweries is mainly done in the following three ways: personal conversations with customers, social media, and feedback from the retailers and the hospitality industry. Beer festivals are frequently named as an important place in which personal conversations with customers can be held.

The *generation of competitor information* is mainly done in the following three ways: personal contact with competitors, looking around in shops and social media.

The *responsiveness* to the generated information is limited overall. Some breweries do not respond at all, while some respond to customer information to a certain extend. A shared idea is that the breweries are willing to respond, but rather do their own thing and focus on their own characteristics. When they do respond to customer information, is has to meet the following three requires: it has to fit their image, own taste, and the quality must be guaranteed. This approach is called 'brand orientation' and revolves around protecting the most important resource of an organization: the brand.

The interviews show that microbreweries do not respond to competitor information. They all state that they focus on their own strengths.

At last the *performance* of the breweries. The interviews showed that four out of six breweries had little goals when they started. Their goals mainly consisted of pursuing their hobby and keeping the quality high.

Four out of six interviewees achieved the general goals they formulated, when they started their business. The interviews show that the two interviewees whose brewery-goals were not achieved relatively showed very low levels of responsiveness. Furthermore, they had little knowledge about where their products are sold and what the strengths and weaknesses of their competitors are.

7 Discussion

This thesis investigates what aspects of market orientation are present in microbreweries in The Netherlands. The interviews show that microbreweries in The Netherlands are quite customer oriented, not really competitor oriented, have several techniques and sources from which they gather information, and are not highly responsive to this information. There are some similarities between the answers given by the respondents and the literature. Personal sources were used to generate customer information. The respondents regularly talk with their customers. This is also done by participating in social activities like beer festivals, where direct contact is guaranteed. Written secondary data are rarely used, but the internet is used frequently. Especially social media are used as an important source of customer and competitor information. Another similarity is the fact that specialists are not attracted or used in the microbreweries. Finally, there are indications that being more market oriented has a positive effect on the performance of microbreweries.

7.1 Limitations

A limitation of the literature research, is that the focus was mainly on the older literature. This caused a difference between the answers given by the interviewees and the literature investigated before. An example of this, is the extensive use of the internet and specifically social media, which was but briefly discussed in the literature review. Another example of this, is the fact that the respondents in this research were more brand oriented than market oriented. Brand orientation was not discussed in the literature review, but the respondents showed signs particular for brand orientation. An overarching theme was that the microbreweries want to listen and respond to the wishes of their customers, but only if it fits their brand. It has to fit their identity, own taste, and the quality must be guaranteed. Simply stated: their brand has to be protected.

The coronavirus has had some impact on this research. It made it harder to get in contact with breweries that were willing to do an interview. Some did not respond and others that did, responded that they did not have time for an interview of possibly more than an hour, so not all randomly chosen microbreweries participated in this research. Eleven breweries were contacted in total, of which six agreed to an interview. No clear similarities are visible among the five breweries that did not respond or did not want to participate, so no underlying reason has to be assumed.

Next to that, due to the corona rules, five interviews were conducted through a video call. A conversation face to face is different from one screen to screen. It was harder to take up on the mentioned subjects and have a smooth conversation. The interview questions might have been too broad. The given answers often varied quite a bit, which made it harder to analyze these answers. This is one of the reasons why the conclusion regarding the relationship between responsiveness and performance can not be made with certainty. Another impact that the corona virus had on the research is, that most respondents temporarily stopped brewing beer since a lot less was expected to be sold.

Regarding the external validity: the interviewees were chosen randomly from a list of microbreweries in Noord-Brabant, The Netherlands. There is no reason to assume the answers of these interviewees are not generalizable to the rest of The Netherlands. By randomly choosing the participants of this interview, the interviewees are a good representation of the population is assured. However, since only 6 interviews were conducted, this might not be a perfect representation.

Regarding the internal validity: by using the interview guide, a structural way of conducting the interviews was possible. If interviewees misunderstood or digressed from the original question corrections were made to ensure everyone understands the question clearly and answers the same question.

7.2 Managerial implications

The implication for managers/owners of microbreweries is that when trying to create superior value for their customers, it is important to respond to the customer and competitor information gathered. This research found that respondents who showed higher responsiveness, also achieved the goals they initially formulated. An example of implementing higher responsiveness, is by not only listening to the preferences of your customers, but also incorporating those preferences in the product you make.

It was found that the respondents think that the market for craft beer is saturated and the respondents think that many breweries will stop or go bankrupt in the next few years. Interesting though, is that the respondents do not think about the possibility that they might not make it. An implication for managers/owners of microbreweries is that they should think about ways they can assure survival. A way of doing this, is by focussing on storytelling and creating an experience around both the beer and the brewery. Another way of doing this, is by paying more attention to the competition. It was found that the managers/owners of microbreweries mainly want to focus on themselves and that strategies of competition are disregarded. By looking at your competition though, managers might see interesting developments they would otherwise miss.

7.3 Suggestions for further research

Further research can be conducted into the relationship between market orientation and performance in microbreweries. This research provided several aspects of market orientation that is present in microbreweries, as well as several aspects that are not present. This research has given insight in what microbreweries do, but a future research with more respondents might represent the population better. Another future research that can be conducted, is in the form of quantitative research. A larger number of respondents can be reached and analyzed with quantitative research. This should provide a better picture of the relationship between performance and market orientation in microbreweries.

Further research will help managers of microbreweries to serve their customers better and give them possibilities to survive in the saturated market of craft beer.

Another research that can be conducted is about the collegiality between the microbreweries, where it comes from, and whether this is special for this particular industry. What the opportunities/advantages or threats/disadvantages of this collegiality are can also be investigated.

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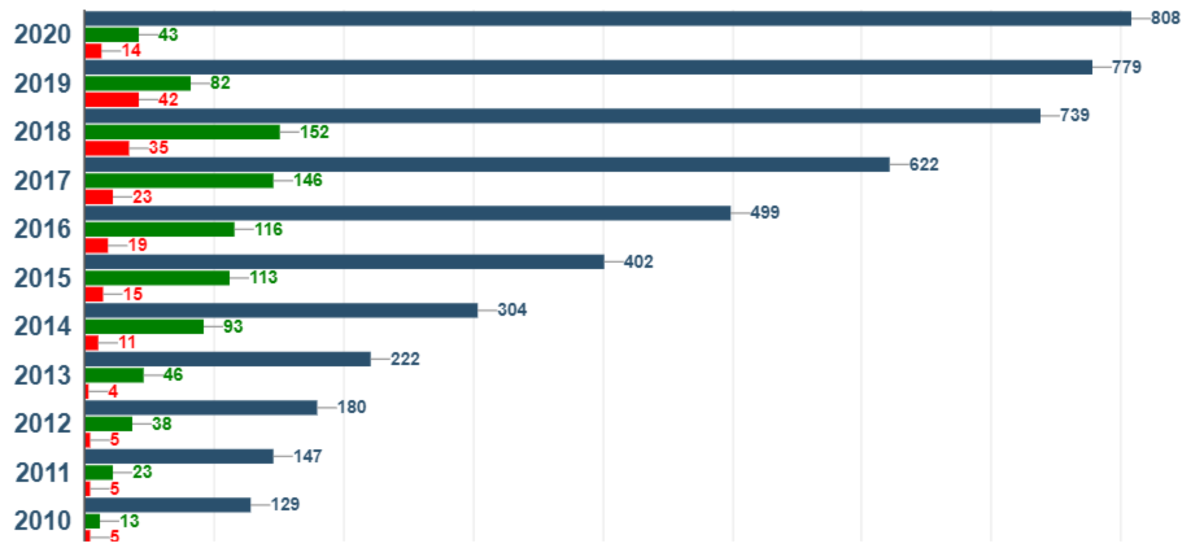
9 APPENDIX

9.1. Graph 1. Growth of breweries in The Netherlands (www.nederlandsebiercultuur.nl)



9.2. Interview guide

Introducerende vragen

Wat was de belangrijkste reden voor u om een bierbrouwerij te beginnen?

Topic 1: Customer Orientation

Bent u klantgericht?

Wie zijn uw belangrijkste klanten?
- Wie is uw grootste afnemer?
- Waar verkoopt u het meeste?

Richt je je op specifieke groepen klanten?

Wat weet u van de wensen van uw klanten?
- Wat zijn hun bij u bekende voorkeuren?

Wat weet u van het afzetkanaal van uw product?

Wat is de belangrijkste verandering in jouw markt in de afgelopen twee jaar?

Wat is de grootste verandering die u te wachten staat in de biermarkt?

Topic 2: Competitor Orientation

Wat zijn uw belangrijkste concurrenten?

Wat doen uw concurrenten?
- Wat is hun strategie?
- Hoe snoepen zij uw klanten weg?
- Wat is hun voordeel ten opzichte van u?

Op welke punten bent u sterker dan uw concurrenten?
- Wat is uw voordeel ten opzichte van hun?

Wat biedt u wat uw concurrenten niet kunnen bieden?

Wat is de grootste verandering in concurrentie in de afgelopen twee jaar?

Wat is de grootste verandering in concurrentie die u te wachten staat?

Topic 3: Intelligence Generation

Hoe verzamelt u informatie over uw wie uw klanten zijn?
- Welke bronnen raadpleegt u?

Hoe verzamelt u informatie over de wensen van uw klanten?
- Welke bronnen raadpleegt u?

Hoe blijft u op de hoogte van uw klanteninformatie?
- Hoe vaak per maand verzamelt u informatie?

Hoe weet u wie uw belangrijkste concurrenten zijn?
- Welke bronnen raadpleegt u?

Hoe verzamelt u informatie over de sterke en zwakke punten van uw concurrenten?
- Welke bronnen raadpleegt u?

Topic 4: Intelligence Responsiveness

Op welke manier past u zich aan aan de wensen van je klanten?

Op welke manier reageert u op uw concurrenten?

Op welke manier speelt u in op de veranderingen in je markt?

Topic 5: Performance

Wat waren uw doelstellingen toen u met de brouwerij begon?

In hoeverre zijn deze doelstellingen behaald?

9.3 List of microbreweries in Noord-Brabant

1. **Brouwerij Willem Zuyd**
   Brouwerijhuurder
   Beek en Donk, Noord-Brabant
2. **AAA brouwerij**
   Brouwerij
   Roosendaal, Noord-Brabant
3. **Arnulfus Bier**
   Brouwerijhuurder
   Roosendaal, Noord-Brabant
4. **Baros Bier**
   Brouwerijhuurder
   Sprang-Capelle, Noord-Brabant

5. **Batches Brewery | Brouwstudio**
Brouwerij
Berlicum, Noord-Brabant
6. **Bavelse Bierbrouwerij**
Brouwerijhuurder
Bavel (gemeente Breda), Noord-Brabant
7. **Beerze Brouwerij**
Brouwerijhuurder
Vessem, Noord-Brabant
8. **Belgica**
Brouwerijhuurder
Made, Noord-Brabant
9. **Berne Abdijbier**
Brouwerijhuurder
Heeswijk-Dinther, Noord-Brabant
10. **Bierbrouwerij Breda**
Brouwerijverhuurder
Breda, Noord-Brabant
11. **Bierbrouwerij De 3 Horne**
Brouwerij
Kaatsheuvel, Noord-Brabant
12. **Bierbrouwerij De Magistraat**
Brouwerij
Almkerk, Noord-Brabant
13. **Bierbrouwerij De Roos anno 1877**
Brouwerij
Hilvarenbeek, Noord-Brabant
14. **Bierbrouwerij De Vijfhoeck (Helmond)**
Brouwerijhuurder
Helmond, Noord-Brabant
15. **Bierbrouwerij De Vissenberg (Sprundel)**
Brouwerijhuurder
Sprundel, Noord-Brabant
16. **Bierbrouwerij Sint Servattumus**
Brouwerij
Schijndel, Noord-Brabant
17. **Bierbrouwerij Smeijsters**
Brouwerijhuurder
Oirschot, Noord-Brabant
18. **Big Belly Brewing**
Brouwerijhuurder
Breda, Noord-Brabant
19. **Bossche Brouwers aan de Vaart**
Brouwerij
's-Hertogenbosch, Noord-Brabant
20. **Brons Bier**
Brouwerijhuurder
Eindhoven, Noord-Brabant
21. **Brouwerij Bravoure**
Brouwerij
Etten-Leur, Noord-Brabant
22. **Brouwerij 't Brabants Gevoel**
Brouwerijhuurder
Dongen, Noord-Brabant
23. **Brouwerij 'T MAG**
Brouwerijhuurder
Tilburg, Noord-Brabant
24. **Brouwerij 't Meuleneind**
Brouwerijhuurder
Hoeven, Noord-Brabant
25. **Brouwerij Bentrotsch**
Workshopbrouwerij
Woudrichem, Noord-Brabant
26. **Brouwerij Bliksem**
Brouwerijhuurder
Breda, Noord-Brabant
27. **Brouwerij Boegbeeld**
Brouwerij
's-Hertogenbosch, Noord-Brabant
28. **Brouwerij Boschdal**
Brouwerijhuurder
Prinsenbeek, Noord-Brabant
29. **Brouwerij Boslust**
Brouwerijhuurder
Alphen (NB.), Noord-Brabant

30. **Brouwerij Bourgogne Kruis (Oosterhout)**
    Brouwerij
    Oosterhout (NB.), Noord-Brabant
31. **Brouwerij papa**
    Brouwerijhuurder
    Breda, Noord-Brabant
32. **Brouwerij Brood**
    Brouwerij
    Zevenbergen, Noord-Brabant
33. **Brouwerij Cerberus**
    Brouwerijhuurder
    Boxtel, Noord-Brabant
34. **Brouwerij D'n Draok**
    Brouwerijhuurder
    's-Hertogenbosch, Noord-Brabant
35. **Brouwerij D'n Hopper**
    Brouwerij
    Kaatsheuvel, Noord-Brabant
36. **Brouwerij D'n Luie Nond**
    Brouwerijhuurder
    Klundert, Noord-Brabant
37. **Brouwerij De Beyerd**
    Brouwerij
    Breda, Noord-Brabant
38. **Brouwerij De Blauwe IJsbeer**
    Brouwerijhuurder
    Tilburg, Noord-Brabant
39. **Brouwerij De Blauwe Knoop**
    Brouwerij
    Mill, Noord-Brabant
40. **Brouwerij De Bolle Brouwketel**
    Brouwerij
    Bladel, Noord-Brabant
41. **Brouwerij De Commies**
    Brouwerij
    Nispen, Noord-Brabant
42. **Brouwerij de Deftige Aap**
    Brouwerij
    Helmond, Noord-Brabant
43. **Brouwerij de Drie Heerlijkheden**
    Brouwerij
    Zundert, Noord-Brabant
44. **Brouwerij De Gieterij**
    Brouwerij
    Aarle-Rixtel, Noord-Brabant
45. **Brouwerij De Halve Ton**
    Brouwerijhuurder
    Tilburg, Noord-Brabant
46. **Brouwerij De Kat**
    Brouwerijhuurder
    Helmond, Noord-Brabant
47. **Brouwerij De Kluys**
    Brouwerijhuurder
    Ravenstein, Noord-Brabant
48. **Brouwerij De Man**
    Brouwerijhuurder
    Tilburg, Noord-Brabant
49. **Brouwerij De Manskerel**
    Brouwerijhuurder
    Breda, Noord-Brabant
50. **Brouwerij De Markies**
    Brouwerij
    's-Hertogenbosch, Noord-Brabant
51. **Brouwerij De Peel**
    Brouwerij
    Asten, Noord-Brabant
52. **Brouwerij De Toekomst**
    Brouwerij
    Fijnaart, Noord-Brabant
53. **Brouwerij De Twee Leeuwen**
    Brouwerij
    Raamsdonksveer, Noord-Brabant
54. **Brouwerij De Vergulde Pul**
    Brouwerij
    Reusel, Noord-Brabant

55. **Brouwerij De Vorstin**
Brouwerij
Oud Gastel, Noord-Brabant
56. **Brouwerij De Werkplaats**
Workshopbrouwerij
Breda, Noord-Brabant
57. **Brouwerij Der Verlanghe**
Brouwerijhuurder
Heesch, Noord-Brabant
58. **Brouwerij Eeuwig Zonde**
Brouwerijhuurder
Someren, Noord-Brabant
59. **Brouwerij Frontaal**
Brouwerij
Breda, Noord-Brabant
60. **Brouwerij Halve Tamme**
Brouwerij
Zevenbergen, Noord-Brabant
61. **Brouwerij Het 58e Genot**
Brouwerij
Zundert, Noord-Brabant
62. **Brouwerij Het Beest**
Brouwerijhuurder
Roosendaal, Noord-Brabant
63. **Brouwerij Het Levenswater**
Brouwerijhuurder
Rosmalen, Noord-Brabant
64. **Brouwerij Het Rijkshotel**
Brouwerij
Veldhoven, Noord-Brabant
65. **Brouwerij Het Veem**
Brouwerij
Eindhoven, Noord-Brabant
66. **Brouwerij Heusden**
Brouwerij
Heusden, Noord-Brabant
67. **Brouwerij Holevoort**
Brouwerij
Bakel, Noord-Brabant
68. **Brouwerij Hopperveld**
Brouwerijhuurder
Dinteloord, Noord-Brabant
69. **Brouwerij Kaarschot**
Brouwerij
Rijsbergen, Noord-Brabant
70. **Brouwerij Laarbeek**
Brouwerij
Aarle-Rixtel, Noord-Brabant
71. **Brouwerij Laveloos**
Brouwerijhuurder
Roosendaal, Noord-Brabant
72. **Brouwerij Met Maten**
Brouwerij
's-Hertogenbosch, Noord-Brabant
73. **Brouwerij Nicolaas**
Brouwerij
Goirle, Noord-Brabant
74. **Brouwerij Nijver**
Brouwerij
Geldrop, Noord-Brabant
75. **Brouwerij Nooitgedacht**
Brouwerijhuurder
Woudrichem, Noord-Brabant
76. **Brouwerij Norem**
Brouwerij
Rosmalen, Noord-Brabant
77. **Brouwerij Nuenhem**
Brouwerijhuurder
Nuenen, Noord-Brabant
78. **Brouwerij Parelhoen**
Brouwerij
Roosendaal, Noord-Brabant
79. **Brouwerij Rufus**
Brouwerijhuurder
Heeze, Noord-Brabant

80. **Brouwerij Schoentjes**
Brouwerijhuurder
Tilburg, Noord-Brabant
81. **Brouwerij Sint Crispijn**
Brouwerij
Waalwijk, Noord-Brabant
82. **Brouwerij Sint Juttemis**
Brouwerijhuurder
Tilburg, Noord-Brabant
83. **Brouwerij Sterck**
Brouwerij
Bergen Op Zoom, Noord-Brabant
84. **Brouwerij Strijder**
Brouwerij
Best, Noord-Brabant
85. **Brouwerij Theodorus**
Brouwerij
Heesch, Noord-Brabant
86. **Brouwerij Twee Vingers**
Brouwerijhuurder
Waalre, Noord-Brabant
87. **Brouwerij Vandeoirsprong**
Brouwerij
Oirschot, Noord-Brabant
88. **Brouwerij Witte Anker**
Brouwerijhuurder
Breda, Noord-Brabant
89. **Budelse Brouwerij**
Brouwerij
Budel, Noord-Brabant
90. **Croybier**
Brouwerij
Aarle-Rixtel, Noord-Brabant
91. **Cuijkse Brouwbrigade**
Brouwerijhuurder
Cuijk, Noord-Brabant
92. **Daan's Moonshine**
Brouwerijhuurder
Breda, Noord-Brabant
93. **De Bierboerderij**
Brouwerijhuurder
Haaren, Noord-Brabant
94. **De Lastige Broertjes**
Brouwerijhuurder
Oosterhout (NB.), Noord-Brabant
95. **De Molengraaf Brouwerij**
Brouwerij
Mierlo, Noord-Brabant
96. **De Nachtbrouwerij**
Brouwerij
Dongen, Noord-Brabant
97. **De Peelreus**
Brouwerijhuurder
Deurne, Noord-Brabant
98. **De Veldhovense Bierbrouwerij**
Brouwerij
Veldhoven, Noord-Brabant
99. **Dorpsbrouwerij de Pimpelmeesch**
Brouwerij
Chaam, Noord-Brabant
100. **Dorpsbrouwerij Terheijden**
Brouwerij
Terheijden, Noord-Brabant
101. **Dutch Fox Brewery**
Brouwerijhuurder
Steenbergen (NB.), Noord-Brabant
102. **Een Kwestie Van Bier**
Brouwerij
Chaam, Noord-Brabant
103. **Engelbertus**
Brouwerijhuurder
Son en Breugel, Noord-Brabant
104. **Fire Power Brewery**
Brouwerij
Oosterhout (NB.), Noord-Brabant

105. **Gebroeders Hop**
Brouwerijhuurder
Tilburg, Noord-Brabant
106. **Gebroeders Roodbaard Brouwerij**
Brouwerij
Steenbergen (NB.), Noord-Brabant
107. **GierBier**
Brouwerijhuurder
Sint Anthonis, Noord-Brabant
108. **Goede Kant van het Spoor**
Brouwerijhuurder
Geldrop, Noord-Brabant
109. **Graafsch Genot**
Brouwerijhuurder
Grave, Noord-Brabant
110. **HAPJ Bieren**
Brouwerijhuurder
Oisterwijk, Noord-Brabant
111. **Hart4Bier**
Brouwerijhuurder
Roosendaal, Noord-Brabant
112. **Hemelwater Craft Beer**
Brouwerijhuurder
Zeeland, Noord-Brabant
113. **Het Rooi Gebroed**
Brouwerijhuurder
Valkenswaard, Noord-Brabant
114. **HillDevils Beers**
Brouwerijhuurder
Wouwse Plantage, Noord-Brabant
115. **Hooglander Bier**
Brouwerijhuurder
Aarle-Rixtel, Noord-Brabant
116. **Húflo Originals**
Brouwerijhuurder
Helmond, Noord-Brabant
117. **Huisbrouwerij Mieghelm**
Brouwerij
Sint-Michielsgestel, Noord-Brabant
118. **iKi Bier**
Brouwerijhuurder
's-Hertogenbosch, Noord-Brabant
119. **KraftBier**
Brouwerijhuurder
Tilburg, Noord-Brabant
120. **LOC Brewery**
Brouwerij
Tilburg, Noord-Brabant
121. **Luie Brouwers**
Brouwerijhuurder
's-Hertogenbosch, Noord-Brabant
122. **Lux Brewery**
Brouwerijhuurder
Eindhoven, Noord-Brabant
123. **Micro Brouwerij De Rijpelaer**
Brouwerij
Helmond, Noord-Brabant
124. **Muifelbrouwerij**
Brouwerij
Oss, Noord-Brabant
125. **Nemeton Brewing**
Brouwerij
Waalwijk, Noord-Brabant
126. **Oldskool Brewery**
Brouwerijhuurder
Eindhoven, Noord-Brabant
127. **Opener Bier**
Brouwerij
Dongen, Noord-Brabant
128. **Paoter Gustaaf**
Brouwerijhuurder
Breda, Noord-Brabant
129. **Papa Brews**
Brouwerijhuurder
Eindhoven, Noord-Brabant

130. **Pinterman**
Brouwerijhuurder
Tilburg, Noord-Brabant
131. **Ramses Bier**
Brouwerij
Hooge Zwaluwe, Noord-Brabant
132. **RBM Brouwerij**
Brouwerij
Sint-Oedenrode, Noord-Brabant
133. **Reuzenbieren**
Brouwerij
Moergestel, Noord-Brabant
134. **Sint Christoffel Speciaalbieren**
Brouwerijhuurder
Breda, Noord-Brabant
135. **Skavuiten**
Brouwerijhuurder
Asten, Noord-Brabant
136. **Solo Beer**
Brouwerijhuurder
Gemert, Noord-Brabant
137. **Speciaalbierbrouwerij Oijen**
Brouwerij
Oijen, Noord-Brabant
138. **Stadsbrouwerij 013**
Brouwerij
Tilburg, Noord-Brabant
139. **Stadsbrouwerij De Vleeghel**
Brouwerij
Veghel, Noord-Brabant
140. **Stadsbrouwerij Eindhoven**
Brouwerij
Eindhoven, Noord-Brabant
141. **Stadsbrouwerij Jongens van De Wit**
Brouwerij
's-Hertogenbosch, Noord-Brabant
142. **Stadsbrouwerij Sint Joris**
Brouwerij
Breda, Noord-Brabant
143. **Stadsbrouwerij Tilburg**
Brouwerij
Tilburg, Noord-Brabant
144. **Stadsbrouwerij van Kollenburg**
Brouwerij
's-Hertogenbosch, Noord-Brabant
145. **Stichting Heerlijk en Eerlijk (Woerkumer / Altena Bier)**
Brouwerijhuurder
Woudrichem, Noord-Brabant
146. **Stoombierbrouwerij De Pimpelier**
Brouwerij
Budel-Schoot, Noord-Brabant
147. **Streekbrouwerij De Stramme Kabouter**
Brouwerijhuurder
Mill, Noord-Brabant
148. **Strieper Craft Beer Company**
Brouwerijhuurder
Valkenswaard, Noord-Brabant
149. **The Wild Mill**
Brouwerijhuurder
Roosendaal, Noord-Brabant
150. **Thissen's Brouwerij Lith**
Brouwerij
Lith, Noord-Brabant
151. **Toebes Bier**
Brouwerij
Sint Agatha, Noord-Brabant
152. **Torens Tilburg**
Brouwerij
Tilburg, Noord-Brabant
153. **Trappistenbrouwerij De Kievit**
Brouwerij
Zundert, Noord-Brabant
154. **Ut Schoelie-end**
Brouwerij
Wouw, Noord-Brabant

155. [Uthoka Sommelier & Brouwerij]
Brouwerijhuurder
Berlicum, Noord-Brabant

156. [Vagabond Socially Crafted Beer]
Brouwerij
Gemert, Noord-Brabant

157. [van Moll Eindhoven]
Brouwerij
Eindhoven, Noord-Brabant

158. [Volksabdij Onze Lieve Vrouw ter Duinen]
Brouwerijhuurder
Ossendrecht, Noord-Brabant

159. [Wilskracht Stadsbrouwerij Ravenstein]
Brouwerij
Ravenstein, Noord-Brabant