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Possibilities for Developing Beer Routes in Slovakia

Abstract: The last 30 years of brewing history in Slovakia were the most turbulent ones. They were influenced by the liquidation of some beer production as well as privatization, integration and acquisitions of global beer producers. As a reaction to the uniform taste of beer produced by the global producers, numerous small craft breweries emerged in Slovakia trying to return the specific beer taste to the regions. Their importance may also be involved in the development of popular beer tourism through beer routes in addition to the fragmentation of the Slovak brewing industry. The aim of this paper is to evaluate the potential of Slovakia for the development of beer routes. The examination and assessment of the possibilities of creating beer routes in Slovakia required considering the historical context first, and then establishing a database comprising the list of craft breweries in Slovakia and the list of places where beer festivals are organised. Correspondence with the President of the Association of Small Independent Slovak Breweries was used for this purpose. Such a database was then verified, supplemented and compared to the database developed by our team based on information from field research, telephone interviews with thirty representatives of breweries, and an analysis of websites of Slovak breweries. The database was further transformed into space, using a map of isolines (equidistant) expressing the mutual distance of the craft breweries. In compiling the results, dynamic-comparative methods and cartographic presentation methods were also used. All together, we identified 70 craft breweries and proposed three beer routes thanks to their spatial distribution.

Keywords: beer producer; beer routes; brewery; brewing; small craft breweries

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INTRODUCTION

Tourism is one of the most dynamically developing sectors. Obviously, it deals with the changes, also related to the changes of the society and its recreation requirements. By

López-Guzmán et al. (2010), there were several changes in tourism in the early years of the 21st century. As a result, shorter holidays are taken with a higher frequency and more variance during the year. Travellers in today's hedonism-influenced society need to be offered more than just nice places and standard attractions. Such modern tourists increasingly demand a thorough knowledge of the region through all their senses (Sieczko, 2017). Similarly, the demand is more strongly focused on authenticity in tourism products and their higher emotional content (Pérez-Calderón, et al., 2016).

In addition, all the above-mentioned needs to be realised together with the principles of sustainability, and sustainable regional development. This has led to an increased interest in gastronomic tourism, which is very often presented through wine routes (e.g. Sivini, Parlato, 2015; Ranca et al., 2007), olive oil routes (Folgado-Fernández et al., 2019), tea routes (Jolliffe, Aslam, 2009; Kunbing, 2019), cheese routes (Folgado-Fernández et al., 2019; Kruczek, 2011), whiskey trail (Martin, Haugh, 1999) and beer routes (Duda-Gromada, 2013a; Feeney, 2017; Slocum, 2015). As reported (Rachão et al., 2019), such concepts of routes are considered as an instrument of economic revitalisation of the area concerned.

The growing popularity of beer tourism has been one of the most noticeable trends in food tourism, or, more precisely, beverage tourism, during the last decade (Duda-Gromada, 2013a; Sieczko, 2017; Slocum, 2015). The major reasons for choosing food tourism include interest in tasting good-quality regional beer, in learning about beer manufacture, in visiting brewery museums (finding out about the history of the brewing industry), in the participation in beer festivals and beer brewing shows, and in experiencing the region's beer culture (Plummer et al, 2005: 449; Duda-Gromada, 2013b). Beer tourism has been rapidly developing in Germany, the Czech Republic, Belgium, the Netherlands, Denmark, Great Britain, the United States, Canada, Brazil, and the Republic of South Africa. The "beer revolution", or the expansion of the manufacture of craft and regional beers, belongs to the major factors affecting the development of this kind of tourism (Duda-Gromada, 2013b). The number of beer kinds and breweries is really impressive. As per "RateBeer", the website and platform operating for beer fans since 2000, there are 33,000 breweries in the world which produce 640,000 kinds of beer (<https://www.ratebeer.com/ratebeerbest/2019>). The Polish literature (Charzyński, Podgórski, Jasińska, 2015; Duda-Gromada, 2013a; Duda-Gromada, 2013b; Kosmaczewska 2008; Rogowski, 2016; Rogowski, Kuc, 2013; Sieczko, 2017), and foreign literature (Alonso, 2011; Bizinelli et al., 2013; Francioni, 2012; Kraftchick J. F. et al., 2014; Niester, 2008; Pechlner et al., 2009; Plummer et al., 2005; Slocum, 2015) includes numerous studies on the development and characteristics of beer tourism. However, there is a clear deficit in studies devoted to beer tourism routes which would connect breweries, as elements of tourism facilities, and offer beer tasting (beer spa and wellness at times), as well as possibilities to learn about the manufacture and brewing of beer (Duda-Gromada, 2013a; Slocum, 2015).

Attempts have also been made in Slovakia to create a symbiosis of craft breweries and tourism in the form of beer routes in Bratislava, Košice and Záhorie, and promoted in private television with a national significance in 2014. Such initiative was started by the travel agency of CK DOMANAJ s.r.o, which, however, further suspended such activities. The footprint of its activities is recorded at <https://slovakia.travel/>, which is the official, central promotion and information system of the internet tourism of the Slovak Republic, promoting Slovakia as a tourist destination.

Unlike wine routes, beer routes in Slovakia are not linear, with a few exceptions. They are not routes marked in the tourism space and have no coordinators. In accordance with the classification of tourist and cultural routes by Mikos von Rohrscheidt, as used in literature, they are virtual routes (Mikos von Rohrscheidt, 2010: 53), based on a network of functioning breweries (www.slovakia.travel). This is the reason why the article is aimed at evaluating the potential of Slovakia for the development of beer tourism and at designing linear beer routes which meet the criteria of a real or material route (Mikos von Rohrscheidt, 2010: 53), e.g. Fränkische Bierstraße (Steinecke, 2006; www.bierstrasse-franken.de) or the Montana Brewery Trail. The Slovak beer routes designed in this way may be attractive both to domestic and foreign tourists whose main travel goal is to learn about the production of beer in craft breweries and to taste such beer.

MATERIAL AND METHODS

The brewing industry in Slovakia has a rich tradition, which is considered important to be introduced in the paper, based on relevant literature, such as Cabada (2000), Kandráčková, Kulla (2012) and Kramáreková, Krajčík (2015).

To meet the main objective of this study, which was to assess the possibility of creating beer routes, several steps had to be taken:

As the database of small craft breweries, considered being the basis for creating the routes, is not yet available in Slovakia, it was necessary to create such database. To do so, the mail communication with the chairman of the Association of Small Independent Breweries of Slovakia Ing. Lubomír Vančo was used. His database was then compared, verified and supplemented with our database, which was developed on the basis of information collected during field studies, telephone interviews with the 30 representatives of the breweries and analysis of Slovak breweries websites. Pen and paper interviews provided important additional information on the establishment of craft breweries, their selling methods and activities to support beer tourism in Slovakia (own pub or restaurant, trips, tasting, etc.). Interviews were carried out in October and November 2019.

1. The database designed this way contains the breweries with a permanent address, potentially useful in tourism. It does not include the breweries using the facilities of another brewery, known as the gypsy brewing.
2. Regarding beer tourism, including beer routes, organised events are important – beer parades and beer festivals, offering the possibility of tasting different kinds of beer from different craft breweries in one place. The database of beer festivals (pivných slávností) was based on the websites of these events and on the analysis of publications in regional press and on promotional materials of the events.
3. The database was further transformed into space, using cartographic presentation methods: a cartodiagram and map of isolines (equidistant) expressing the mutual distance of the craft breweries. We used the equidistant 25 km as the basic unit, which is the distance that can be travelled in one day (on foot or by bike). This is normally used to identify stage locations on a thematic route (for more detail see Csapó Wetzl, 2016, Mróz, Mróz, Krogmann, 2019). The map of beer routes has been created using a cartographic method of marked lines. All together, we

identified all together 70 craft breweries and proposed three beer routes thanks to their spatial distribution.

RESULTS

Brief history of brewing in Slovakia

Beer is the third most consumed drink preceded by water and tea (Patterson, Hoalst-Pullen, 2014). The recipe for beer production has been developed and improved over the centuries just to enable one to appreciate and enjoy the unmistakable taste of this beverage. The production of beer has a long tradition. 6,000 BC, the Sumerian and later Egyptian findings document its existence. One of the oldest evidence of beer production is the charter of Ladislav IV from 1274 (Cabadaĵ, 2000). In the Middle Ages, it became a favourite drink of all classes of the society. It was brewed in monasteries (the Benedictines, in particular), and also in royal cities where municipal breweries were established (Hallon, 2005). History of brewing is related to rich mining towns (such as Banská Štiavnica, Banská Bystrica). In Vyhne, there is the oldest brewery in Slovakia continuously operating – Steiger Brewery, founded in 1473 (www.steiger/historia.sk). Brewing in Slovakia reached its greatest boom in the period of 1620 to 1650. Beer was then brewed in all cities and larger municipalities in Slovakia. Since 1850, the era of the greatest decline in brewing has begun, which was caused by the introduction of a high tax for brewing beer (Vacl, 2019). The industrial revolution was also positively reflected in the production of beer by improved technologies (mixing machines). The construction of the first refrigeration plant (compressor cooler) by German engineer and inventor Carl von Linde in 1871 allowed the refrigeration process and beer production throughout the year at the same temperature (before that, most breweries produced beer in the winter, storing it in underground cellars and caves to protect it from summer heat). Modern breweries were established in Slovakia (Košice 1857, Bratislava 1873, Michalovce 1867, Martin 1893, Nitra 1896).

After the establishment of Czechoslovakia, the Slovak breweries did not have to compete with strong Budapest breweries; however, the Czech breweries appeared to be even stronger competitors (Cabadaĵ, 2000), with much larger production capacities.

The Slovak breweries thus produced approx. 350,000 hectolitres of beer in the 1920/21 campaign, 5% of state production (Bujnák, 1932). Since 1948, twelve breweries with a capacity of 960,000 hectolitres were nationalised and later also new breweries were built. During the period of socialism new breweries were established in Nitra (renewed production in 1953, closed in the interwar period), in Topoľčany (in 1964), Rimavská Sobota (in 1966), Veľký Šariš (in 1967), Hurbanovo (in 1969), Banská Bystrica (in 1971) and Trnava (in 1974).

Extensive reconstruction and modernisation of older breweries such as in Hlohovec, Levoča, Bratislava, Banská Bystrica and other cities started. The transformation of the economy after 1989 from directive to market management was reflected in significant changes in the Slovak brewing industry. There were significant changes in the privatisation, restructuring of production, and in the absence of domestic capital, foreign capital entered, which played a key role in the transformation and subsequent stabilization of this food industry in Slovakia. During these processes, some breweries ceased to exist, others were established on the national and foreign markets.

Fifteen breweries (in Bratislava, Trnava, Hurbanovo, Topolčany, Nitra, Ilava, Bytča, Martin, Vyhne, Banská Bystrica, Poprad, Rimavská Sobota, Veľký Šariš, Michalovce, Košice) underwent privatisation and restructuring processes in the early 1990s (Dubcová, 2010).

These breweries were managed by new Slovak business environment, whose emergence was significantly helped by the Slovak government leaders. Several breweries were forced to stop the production (e.g. Michalovce, Ilava, Trnava).

Lack of domestic capital for further development of the industry allowed foreign capital to enter in 1995, which brought international new know-how, technology, improved vertical coordination and also homogenisation of beer and concentration of production.

The Dutch company of Heineken is the first and most important investor, which acquired the most modern brewery Zlatý Bažant in Hurbanovo together with the malt house. Heineken gradually took over production in other regional breweries. In 1997, it was the brewery in Nitra, Martin and Rimavská Sobota. Consequently, as a result of concentration and streamlining production in the company occurred in 2003–2006. In 2017, Heineken's market share on the Slovak market reached 56% (<http://www.slovenskepivo.sk/upload/editor/m7it1ks2ka15uzf12inq.pdf>).

SAB Miller was the second foreign investor. It bought a brewery in Topolčany and Veľký Šariš, sold to Anheuser-Busch InBev in 2016. The production is in Veľký Šariš right now. In 2017, Central European acquisitions were sold to the Japanese group of Asahi and the enterprise in Veľký Šariš is currently named Plzeňský Prazdroj Slovensko. Together, they control around 80 percent of the domestic market (Pokrivčák et al., 2018). In addition to the above-mentioned global producers, industrial independent breweries in Vyhne and Banská Bystrica also produce beer.

Entry of craft breweries in Slovakia

There are several reasons for the origin of craft breweries in Slovakia. The first, as already mentioned, is related to globalisation, which caused the disappearance of local breweries and kinds of beer, replaced by the uniform taste. In these times, influenced by increased hedonism, people rather prefer local taste of food and drink, linked to experience. Food and beverage consumption is more associated with emotions and patriotism (Gow, Swinnen, 1998; Pokrivčák et al., 2019). This fact, together with low prices and cheaper loans (Vrána, 2018), was used by the entrepreneurs to establish craft breweries. It was the craft breweries that started to substitute the missing local breweries and became a strong opposition to mass-producing industrial breweries in terms of taste variability (Oliver, 2011). Their success is evidenced by the fact that in the US there were more than 5,000 craft breweries in 2016 (Reid, Gattrell, 2017), 2,000 in Germany and around 200 in Poland (browarinstal.pl).

Interest in new tastes of unpasteurised beer (made from high-quality raw materials), which craft breweries were able to offer was used by several tourist centres in Slovakia to expand their offer to include the brewing segment. Another reason is related to passion for brewing beer (a number of craft breweries started with home brewing). Obviously, this trend was positively influenced by the increase in the purchasing power of the population, so they can afford buying the products of craft breweries. Moreover, regarding the higher price, craft beer is a sign of some prestige.

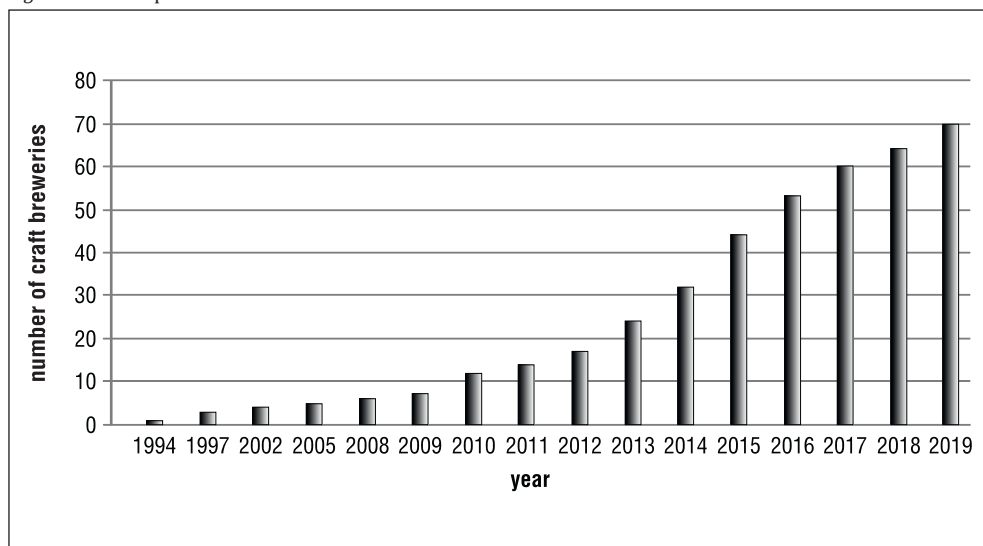
The first craft brewery still active in Slovakia was established in 1994 in Dobrá Niva. The increase in the number of craft breweries was very slow in the first period (1994–2012) and, with the exception of 2010; it represented an increase of 1 to 2 establishments. In the second stage (2013–2019) the increase of craft breweries accelerated with a maximum in 2015, when up to 15 new craft breweries were introduced (Fig. 1).

In 2019, there were 70 stationary craft breweries in operation in Slovakia. In terms of their spatial distribution (Fig. 2), there is an apparent decrease in their density from the West to the East. This fact is undoubtedly related to the purchasing power of the customers, which is not a Slovak issue only (see e.g. Murray et al., 2012; Bujdosó, Szűcs, 2012 for more details). In addition, in Eastern Slovakia, the beer brand (although produced by a large global brewery in Veľký Šariš) is preserved, maintaining continuity of the link with the local population and its beer continues to benefit from the local patriotism of the inhabitants of the eastern region of Slovakia.

Mostly, craft breweries are located in urban areas in Slovakia, as there is stronger demand and purchase power.

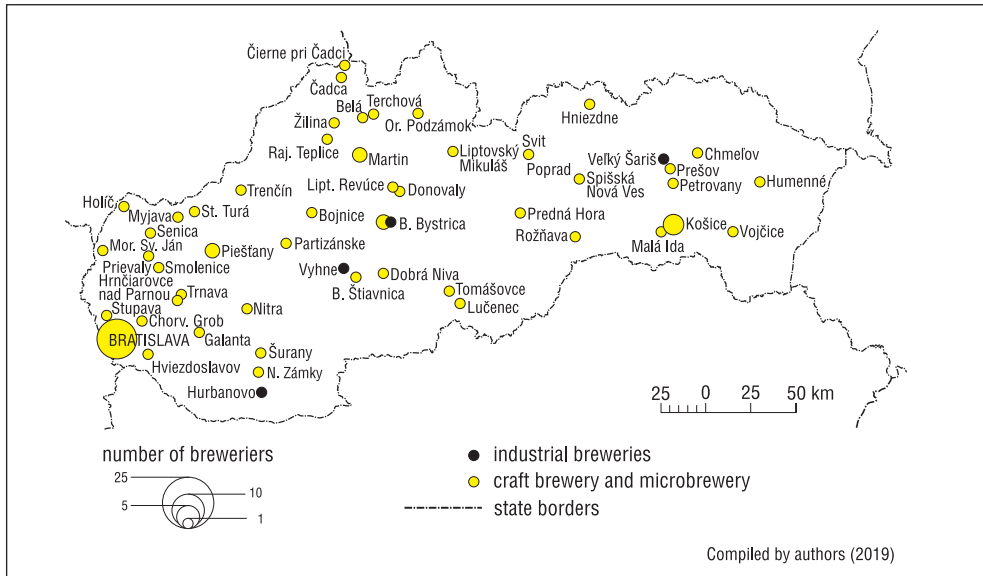
The absolute largest number of craft breweries is reported in Bratislava, the capital city of Slovakia, and there are fifteen breweries. The breweries are also more markedly located in the second largest city of Slovakia – Košice (there are four). Craft breweries are also located in small Slovak towns and in the rural area. Such breweries are located near attractive tourist sites with guaranteed attendance (at least during the summer season), such as the spa town of Bojnice with the most visited chateau in Slovakia (Krogmann et al., 2016), Oravský Podzámok (also a very popular chateau), the village of Terchová, where it is a part of the resort consisting of wooden cottages, and the village of Donovaly (a village with a significant tourist function). In their cases, it is often the expansion of business activities to the trend segment of gastro-tourism, obviously including beer tourism.

Figure 1. Development of the number of breweries in Slovakia



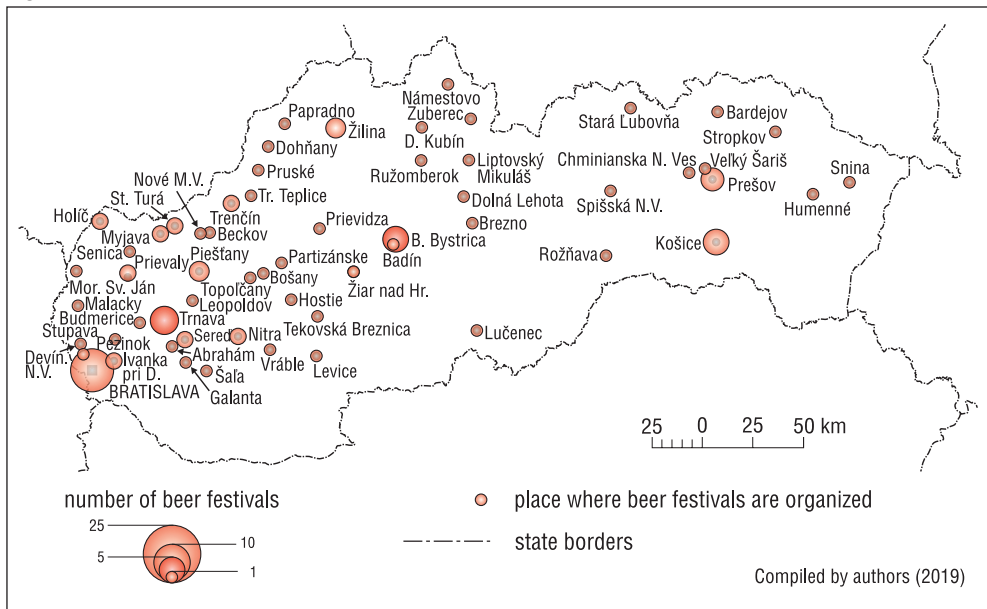
Source: Association of Small Independent Breweries of Slovakia, 2019; Brewers' websites, edited by the authors

Figure 2. Location of craft breweries in Slovakia



Source: Association of Small Independent Breweries of Slovakia, 2019; Brewers' websites, edited by the authors

Figure 3. Location of beer festivals in Slovakia



Source: Association of Small Independent Breweries of Slovakia, 2019; Brewers' websites edited by the authors

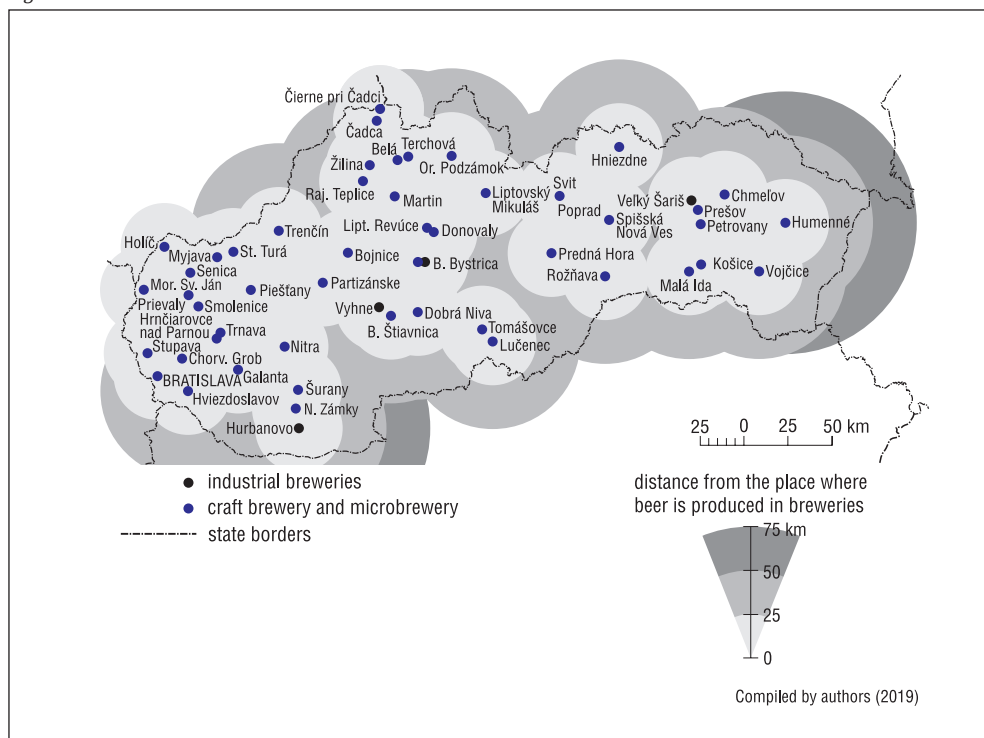
It should be added that craft breweries are also established in towns and villages in order to revitalise the historically known brewing industry, such as the breweries in Trnava, Martin and Nitra.

When assessing the possibilities of establishing beer routes in Slovakia, one should also consider some of the marketing communication of craft breweries and the location of sites where beer festivals are organised. Beer festivals contribute to economic development and are key factors in marketing and developmental plans of the majority of destinations (Getz, 2008; Horng, Su, So, 2013; Cudny, 2013). These festivals also provide good examples of entrepreneurial spirit among local communities. Beer festivals are organised in 55 locations in Slovakia. They are to be found primarily in main towns of regions and districts, and in locations of craft breweries which are often visited by tourists (Fig. 3). Ninety per cent of all beer festivals in Slovakia are held from June to September.

Plans for beer routes

The list of craft breweries was used as an input database for the construction of Fig. 4, showing the distance of the enterprises through isolines. The equidistant of 25 km is used as the base unit, as such distance can be travelled in one day. This is used as a standard to identify stage locations on a thematic route (Csapó, Wetzl, 2016). Fig. 4

Figure 4. Isodistants of breweries in Slovakia



Source: Association of Small Independent Breweries of Slovakia, 2019; Brewers' websites, edited by the authors

reveals that the best conditions for realisation of beer routes are offered by the western part of Slovakia.

The first of the designed beer routes (suggested name: Western Slovakian Beer Route) goes through the Trnava Region in western Slovakia. The route comprises five sections of a total length of 111 km. Each of the proposed sections comes with the necessary tourism infrastructure (accommodation, catering facilities, transportation and information facilities). The route starts in Trnava, the capital of the Trnava Region. Its first section (the shortest one) goes from Trnava to Hrnčiarovce nad Parnou (which lies 5 km away from Trnava, in the south-eastern direction) – the location of a craft brewery. After a visit at the brewery, you return to Trnava, an important tourist centre with numerous precious monuments of architecture and well-developed tourism infrastructure (Fig. 5). The second section of the western Slovak beer route goes from Trnava to the village of Smolenice, which is famous for “Včelovina” mead, one of the best in the world. There you can find a store where not only can you taste the famous mead but also drink beer made from mead. You can also visit the Driny cave, a castle and a museum with an ethnographic collection and the memorial exhibition room devoted to Štefan Banič, an inventor of parachute. The third section goes through the Malé Karpaty mountains, from Smolenice to Prievaly. The latter can boast a craft brewery which may be tasted directly in the brewery inn. Apart from the restaurant, the

Figure 5. Proposed first beer route in Slovakia



Source: Compiled by authors (2019)

company also offers a guest house with a spa offering beer. The local craft brewery also organises the «Záhorácky pivný fest» beer festival, which is held every year at different dates. All the activities associated with the craft brewery are key factors stimulating the development of tourism in the village. The fourth section goes to Senica which is the location of a craft brewery and regular beer festivals (in early July). The town also has a diversified tourism infrastructure network. The last section leads to Holíč where you can taste beer, visit a Baroque and Neoclassical castle, a museum, and several sacred monuments, including the Eastern Orthodox Church of Theotokos of Pochayiv. The route may also be continued in the direction of the town of Hodonín in Czechia, which lies nearby. The town of Holíč has very good transport links – by road and railway. In terms of food tourism and event tourism, the organisation of beer festivals in Senica (July), Trnava (August), Prievaly (August) and Holíč (September) makes the proposed beer route more attractive to tourists.

Rajecké Teplice in the Žilina Region is a starting point of another beer route. In this popular Slovak resort one can find a craft brewery which, apart from beer, also offers accommodation, boarding and beer spa wellness (baths in water with beer added) for tourists. The route goes further to Žilina, the capital of the region, where local beer can be consumed in the local craft brewery and in lots of pubs. Its numerous monuments of architecture, including, for example, Late Romanesque Church of St. Stephen, the Gothic parish church of the Holy Trinity, the Renaissance and Baroque tenement houses in the market square, and the Renaissance Budatín castle are worth attention. From Žilina the route goes to the town of Belá, where tourists can stay at a hotel or camp-site. The proposed route ends in Terchová, one of the main tourist centres in Slovakia. In this resort, beer fans can taste beer manufactured by a craft brewery and stay at attractive wooden chalets. The village is also the location of the museum of Juraj Jánošík, the famous Slovak robber who was born there in 1688. Terchová is an ideal starting point for excursions to Malá Fatra mountains. In 2013, traditional music of Terchová was entered in the UNESCO List of Intangible Cultural Heritage (<https://ich.unesco.org/en/RL/music-of-terchova-00877>). The village is also the site of nation-wide events such as the Festival of Cyril and Methodius (Cyrilometodské slávnosti) organised in early July, and the International Days of Jánošík (*Medzinárodný folklórny festival Jánošíkove dni*) organised towards the end of July and early August. The route (Fig. 6) has a total length of 45.3 km and goes along the existing tourist routes.

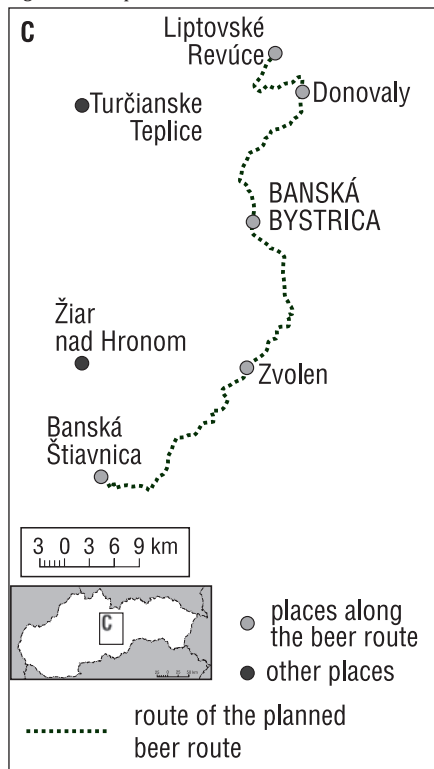
The third route starts in Banská Štiavnica whose medieval mining old town complex was entered in the UNESCO World Heritage List in 1993. The town is the location of the local ERB brewery, which has extended its portfolio with accommodation and catering services, and has begun to engage its residents in the cultural life of the city through theatre (www.erb-sk). Near Banská Štiavnica there are numerous attractive tourist sites (but they lie outside the designed route), e.g. Hodruša-Hámre (a mining museum and a mine) and Sv. Anton with its Baroque manor house. The beer route goes from Banská Štiavnica along marked tourist routes through the Štiavnické vrchy mountains and the Pliešovská kotlina basin to Zvolen. The first craft brewery to manufacture craft non-pasteurised beer is to be established in Zvolen by the end of 2020. Tourists can use Zvolen as a stop on the way; bikers can continue cycling through Zvolen to Banská Bystrica. As the regional metropolis, Banská Bystrica offers not only breweries but also numerous tourist attractions for those who travel along culinary routes. The Museum of Slovak National Uprising, which documents the history of anti-fascist resistance

Figure 6. Proposed second beer route in Slovakia



Source: Compiled by authors (2019)

Figure 7. Proposed third beer route in Slovakia



Source: Compiled by authors (2019)

movement in Slovakia, is one of the town's many cultural attractions. The route goes north off Banská Bystrica, through a network of marked tourist routes, to Donovaly – a popular tourist centre with well-developed tourist facilities. The tourist attractiveness of the village has had an influence on the location of the craft brewery. It may be a start and end point of excursions to the Starohorské vrchy mountains, the Low Tatras and the Veľká Fatra mountains. The last section of the proposed route goes from Donovaly to Liptovské Revúce, where the last craft brewery is located. The village offers accommodation to tourists. We recommend the route (Fig. 7) of a total length of 100 km in May (the beer festival in Banská Štiavnica) and in early August when the beer festival is organised in Banská Bystrica.

CONCLUSION

The craft breweries gradually became established on the Slovak market. In addition to the production of taste-different kinds of beer, they need to be able to extend their innovative activities to the tourism segment, increasingly calling for experiences, local tastes, in opposition to the production of global chains. In addition, it is important to support craft breweries of the tourism sector in establishing beneficial clusters. The reward for such achievements is related to the economic prosperity of the breweries, the inhabitants of the participating regions, and the revitalisation of traditional production activities such as brewing.

Moreover, thanks to the application of the regional specificities, craft breweries are able to influence the opinion on the region. The aim of the paper was to find out the potential for the development of beer routes in Slovakia. Based on the obtained database, three possible beer routes are proposed, leading through the western and central regions of Slovakia with a maximum length approaching 100 km. To create a continuous route crossing a larger area, it will be necessary to increase the density of the craft breweries, and to complement the network of beer and beer product oriented restaurant facilities.

If the proposed beer routes in Slovakia are marked and coordinated, this will be an important factor for the further development of beer tourism in the country. It cannot be denied that the popularity of beer tasting in craft breweries and excursions in the footsteps of this beverage will definitely be on the increase year by year.

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