

MARKETING RESEARCH ON CONSUMER PREFERENCES FOR CRAFT BEER

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Abstract

This paper aims to explore customer preferences for craft beer through a questionnaire-based survey, analyzing key factors influencing purchasing decisions. The research focuses on aspects such as taste, aspect, alcohol content, and price sensitivity to understand the motivation behind the customer choices. The study collected responses from diverse samples of craft beer consumers, examining demographics influences on preferences. The results of the survey show that most respondents are familiar with craft beer, which they consume occasionally, usually in pubs. The bitter taste and fullness of craft beer are appreciated, they also prefer a beer made from quality ingredients with golden color, clear and glossy having a low content of alcohol packed in a glass bottle.

Key words: craft beer, customer, survey

INTRODUCTION

In recent years, the craft beer market has experienced rapid expansion as a result of consumer interest in authentic, artisanal products [3,10]. Craft beers are often not pasteurized or not filtered and, for these reasons, they are products rich in healthy compounds, but with a reduced shelf life [2] As a consequence, the price is higher compared to a regular beer, and its consumers forms a market niche, targeted with specific strategies.

According to the USA Brewers Association [18], global craft beer market size was valued at USD 102.15 billion in 2023. The craft beer industry is projected to grow from USD 108.8 Billion in 2024 to USD 275.76 billion by 2032, exhibiting a compound annual growth rate (CAGR) of 12.33% during the forecast

period (2024 - 2032). The European craft beer market reached USD 37.7 billion in 2023, expecting a growth rate (CAGR) of 6.57% in the period 2024–2032 [6].

In Romania, the beer production sector recorded 102 economic agents with a turnover of 5.2 billion RON, a profit of 213 million RON and 3,420 employees. The main producers are Ursus Breweries SA, Heineken Romania SA, United Romanian Breweries Bereprod SRL, with turnovers of 5.04 billion RON, profit 206 million RON and 1,703 employees [17].

Romanian National Institute of Statistics shows in latest report that beer consumption (per capita) has been decreased by 2.9 liters in 2023 compared to 2022 [13]. Traditional mass-produced beer brands have seen a drop in sales due to shifting consumer preferences, health conscious trends and competition from

other alcoholic beverages. Despite of this slightly contraction of beer market volume, Romanian brewing companies have chosen to increase their investments against the previous year by almost 50%.

However, craft beer has managed to develop a strong and loyal customer base appealing to those who value quality, unique flavors [19, 12].

To adapt their strategies, producers rely on research on consumer behavior, therefore, this article aims to explore the main trends and factors that underpin the decision to buy craft beer. This article aims to answer the question of who the average craft beer consumer in Romania is, starting from the following hypotheses.

Hypotheses and objectives of the research

Q1. How familiar are you with craft beer concept? Known / Very well-known / Very little known / Little known / Totally unknown.

O1: Identification of consumers' knowledge regarding craft beer; identifying the profile of the craft beer consumer by gender groups, age, background, education.

H1: Consumers are little familiar with the concept of craft beer and the knowledge is directly related to their background, gender, age and education [5].

Q2: How often do you drink craft beer? Not at all/ Several times a year/ 1 time a month/ Weekly/ Every day/ Other.

O2: Identification of the craft beer consumer profile. Determining how often craft beer is consumed.

H2: Consumers' preferences for craft beers vary according to gender, age, education. Most respondents consume craft beer occasionally, and the frequency is correlated with personal preferences, lifestyle [9].

Q3. What do you appreciate about craft beer? Taste & Fullness / Color / Personality / Design & Label / Others

O3: Identification of characteristics preferred by consumers in craft beer.

H3: Drinking craft beer is perceived as a multisensory experience. Most respondents value taste as the main reason for choosing this type of beer [7].

Q4. Where do you usually drink craft beer? Home/ Pub/Breweries/ Restaurant/ Fairs/ Others

O4: Determining the preferred places to drink craft beer.

H4: Craft beer is consumed in a variety of places, depending on the context, personal preferences and availability of the product. It is expected that respondents will prefer to consume craft beer in pubs/breweries, in different social contexts. Craft beer is consumed in bars and restaurants [2].

Q5. How do you prefer craft beer to taste? Bitter/ Fruity/ Sweet/Floral/ Other

O5 Identify preferences regarding the taste of craft beer.

H5 Craft beer consumers place great emphasis on the uniqueness and complexity of taste [1]. The various flavors give authenticity, the most appreciated are those that contribute to the bitter and fruity taste.

Q6. Do you prefer craft beer versus industrially produced beer? I prefer craft beer/ I prefer industrial beer/ I don't have a preference.

O6 Establishing consumer preferences for craft beer versus industrially produced beer.

H6 Consumers' preferences for craft beer differ according to gender, age, education. We expect significant influences to have age and education. Young consumers are attracted to the social and exploratory aspect of craft beer [3].

Q7. What is the reason/reasons why you choose to consume craft beer? Atypical & Premium Ingredients/ Desire to Try New Drinks/ Different Taste/ Other

O7 Identify the reasons that lead to the choice of craft beer.

H7 Respondents choose to consume craft beer out of the desire to try new drinks, out of the desire to experiment with different tastes [3].

Q8. What is the amount you are willing to pay for a 500 ml craft beer? 5-10 Ron/ 11-15 Ron/ 16-20 Ron/ +20 Ron

O8 Identification of the price that consumers are willing to pay for 500 ml craft beer.

H8 The price that consumers are willing to pay for 500 ml bottle of craft beer is between 11-15 lei RON.

Q9. What is the source of information that will help you choose a certain type of craft beer? Internet/ Social Media/ Family/Friends/ Other

O9 Determining the source of information that influences the choice of a certain type of craft beer.

H9. Craft beer consumers get their information from a variety of sources; social media plays a key role in the choice made, being the preferred source of information [15].

Q10. What type of packaging do you prefer? Pet/ Dose/ Bottle/ Keg & Draft

O10: Identifying consumer preferences for the type of packaging used in craft beer bottling.

H10: Craft beer consumers prefer to drink the beverage from a glass bottle, the packaging design playing an important role in the choice made in terms of beer packaging, more environmentally committed consumers, who are usually focused on sustainable consumption [8], value glass bottles over cans [14].

Q11. How do you prefer beer, considering the amount of alcohol it contains? 0% Alcohol/ 2-3% Alcohol/ 5% Alcohol/ '+ 5% Alcohol

O11 Establishing preferences according to the amount of alcohol contained in craft beer.

H11 Alcohol content is important for craft beer consumers. Craft beer consumers choose a moderate alcohol content of 5% because they want to enjoy complex flavors without alcoholic strength. The production of beer with low alcohol content is a fast-growing segment in the world market [16].

Q12. How do you prefer beer, considering the color? Gold/ Copper / Light Yellow/ Brown & Black

O12 Identification of beer color preferences as a differentiating element between different types of beer.

H12 Color influences expectations about the beer taste, that's why it plays an important role in the choice of craft beer. Light colors, especially gold, are at the top of the preferences of craft beer consumers [4].

Q13. How do you prefer beer to be considering appearance? Very clear, without opalescent and sediment/ Clear, without sediment, with characteristic gloss/ Slightly

opalescent, with yeast sediment/ Opalescent, with sediment from yeast deposition

O13 Identification of consumer preferences regarding the appearance of beer.

H13 The degree of clarity or opalescence is a visual aspect that attracts attention and provides clues regarding the manufacturing process and certain taste characteristics. Craft beer consumers are attracted by the slightly opalescent aspect.

Q14. What do you think about the following types of beer? Indian Pale Ale, Wheat Beer, Stout, Dark Lager, Pilsener – I Don't Know, I Dislike, Neutral, I Like

O14: Determine the degree of knowledge of different types of beer as well as identify preferences related to these types of beer.

H14 The most popular beer is represented by the Pilsener type beer [2]. The consumption pattern and consumer loyalty differ according to gender, age and education.

Starting from these hypotheses and considering the fulfillment of these objectives and the situation on the beer market in Romania, it becomes necessary to study the preferences of beer consumers, an approach conducted in this research. The paper is divided into five parts. After introduction, the research methodology is presented, then the results are analyzed. Finally, during the discussions, the hypotheses are verified, and the main ideas that resulted from the market research are highlighted in the conclusions.

MATERIALS AND METHODS

The sources of information used to conduct this study are external, primary. For the collection of information, the structured quantitative survey was used [11]. The tool used for data collection was the self-administered questionnaire, disseminated online.

The research was limited to a certain segment of the total community, sample, and the results can be extrapolated to the level of the entire community. The sample, consisting of 280 people, was calculated by mathematical methods, with an error of 5.8%. The accuracy of the application of the quota method as a sampling method can be seen in Tables 1 to 3.

The independent variables considered are gender, age, background and occupation. Table 1 Sample structure by gender, compared to the resident population of Romania aged over 18 years.

Table 1. Sample structure by gender, compared to the resident population of Romania aged over 18 years.

Variable	Total population		Sample population	
Gen	Absolut (persons)	Relative (%)	Absolut (persons)	Relative (%)
Masculine	7,581,036	48.34%	129	46.07%
Feminine	8,102,639	51.66%	151	53.93%
Total	15,683,675	100%	280	100%

Source: calculations based on statistical data (Tempo online database, 2020) and survey results [13].

The sample consists of 53% women and 46% men, shares similarity with the total population (Table 1).

In terms of age, the majority of the sample consists of younger people, aged between 18 and 25 years, and mature people, aged between 36 and 45 years. Elderly people have low shares in the sample, compared to the shares of the total population (Table 2).

Table 2. Sample structure by age compared to total population

Variable	Total population		Sample population	
Age	Absolut (persons)	Relative (%)	Absolut (persons)	Relative (%)
18-25	1,617,753	10.31%	89	31.79%
26-35	2,473,022	15.77%	49	17.50%
36-45	2,917,238	18.60%	74	26.43%
46-55	2,849,749	18.17%	58	20.71%
≥56	5,825,913	37.15%	10	3.57%
Total	15,683,675	100%	280	100%

Source: calculations based on statistical data (Tempo online database, 2020) and survey results [13].

Depending on the rural-urban classification, 75% of the respondents live in urban areas, and about 25% in rural areas, the explanation being that the research refers to the population of the Bucharest-Ilfov metropolitan region, where the main sales of craft beer are concentrated. This product is less present in rural areas.

Table 3. Sample structure by urban- rural classification compared to the total population

Variable	Total population		Sample population	
Urban/Rural Classification	Absolut (persons)	Relative (%)	Absolut (persons)	Relative (%)
Urban	8,484,868	54.10%	211	75.36%
Rural	7,198,807	45.90%	69	24.64%
Total	15,683,675	100%	280	100%

Source: calculations based on statistical data (Tempo online database, 2020) and survey results [13].

RESULTS AND DISCUSSIONS

Data analysis is done on two levels: primary and secondary. The primary level of analysis consists in the elaboration of frequency distribution tables, analyzing the response in correlation with the number of people who formulated the respective response. The secondary level of analysis consists in the elaboration of frequency distribution tables with multiple inputs, analyzing the response in relation to the socio-economic characteristics of the subjects, as well as to other factors.

At first question "How familiar are you with craft beer concept?" 42% of respondents answered that they are familiar with the concept of craft beer and for 29% of them this concept is "little known" (Fig. 1).

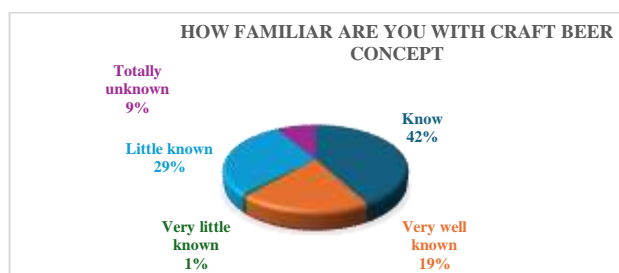


Fig. 1. Respondents' answers to the question: How familiar are you with craft beer concept?

Source: Survey results.

Answers to question "How often do you drink craft beer?" segregate more than half of the respondents, 53%, in occasional consumers, people who consume craft beer only a few times a year. Moderate consumers (13%) drink craft beer weekly and are good connoisseurs of this type of drink (Fig. 2).

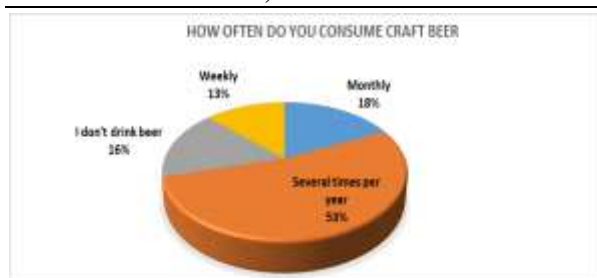


Fig. 2. Respondents' answers to the question: How often do you consume craft beer?
Source: Survey results.

When asked "What do you appreciate about craft beer?" most respondents (62%) appreciate the taste and fullness. These attributes of craft beer are followed in preferences by another characteristic, the personality of beer (in 14% of respondents), a concept that also translates into taste, being represented by the flavors that give authenticity and uniqueness to these drinks. For 11% of respondents, packaging is an attractive element for consumers, who appreciate the interesting design, the story conveyed by the name and the visual aspect (Fig. 3).

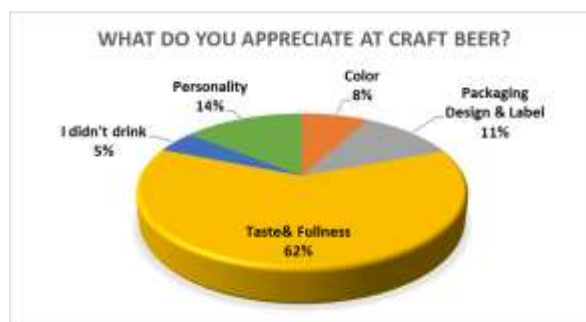


Fig. 3. Respondents' answers to the question: What do you appreciate at craft beer?
Source: Survey results.

To the question "Where do you drink craft beer?" we notice that two answers stand out: Pub - 44% and Home - 38%.

Pubs dedicated to craft beer offer the opportunity to experiment with new selections together with colleagues and friends.

A smaller percentage, 38%, is represented by people who prefer to enjoy craft beer at home, without the pressure of a social environment (Fig. 4).

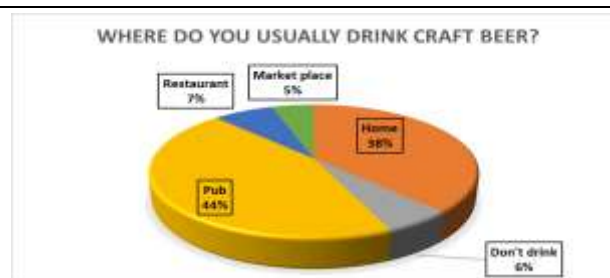


Fig. 4. Respondents' answers to the question: Where do you usually drink craft beer?
Source: Survey results.

When asked "How do you prefer the taste of craft beer?" 41% of respondents prefer the bitter taste, 24% prefer the sweet taste. Diverse aromas, fruity notes (appreciated by 29% of respondents) and floral notes (preferred by 9% of respondents) add to the complexity of the taste and contribute to the entire multisensory experience (Fig. 5).

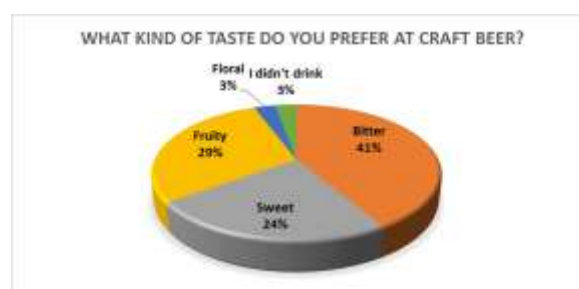


Fig. 5. Respondents' answers to the question: What kind of taste do you prefer at craft beer?
Source: Survey results.

The answers given to question number 6 clearly show the preference of the interviewees for craft beer (55%) to the detriment of beer produced at industrial level (29%) (Fig. 6).

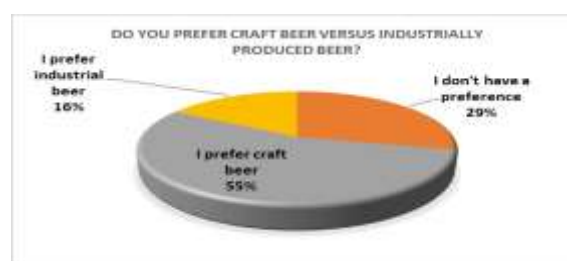


Fig. 6. Respondents' answers to the question: Do you prefer craft beer versus industrially produced beer?
Source: Survey results.

The reasons why craft beer is preferred can be found in the answers of question number 7: different taste (32%), desire to try new drinks (29%).

They consider craft beer a premium product (34%) as a result of using quality ingredients in artisanal process (Fig. 7).

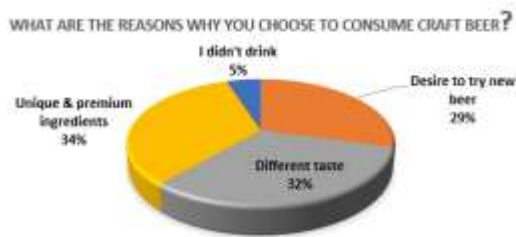


Fig. 7. Respondents' answers to the question: Which are the reasons why you choose to consume craft beer?
Source: Survey results.

Question 8: The amount of money that respondents are willing to spend for 500 ml bottle of beer is found in the range of 11-20 RON, more precisely: 39% would pay between 11-15 RON, and 28% would pay between 16-20 RON. Only 7% of respondents would pay more, over 20 RON.

At the opposite pole are 26% of respondents, who would prefer to pay between 5-10 RON. (Fig. 8).



Fig. 8. Respondents' answers to the question: Which is the amount you are willing to pay for a 500 ml craft beer?
Source: Survey results.

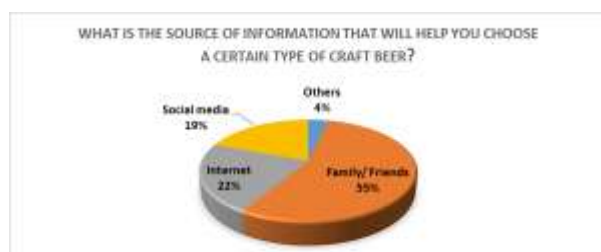


Fig. 9. Respondents' answers to the question: Which is the source of information that will help you choose a certain type of craft beer?
Source: Survey results.

Question 9: Before choosing a particular type of craft beer, consumers get information from

a variety of sources. Family and friends (55%) are the source of trust according to the survey. Online reviews and specialized applications, 19% and 22% respectively, contribute to the prior information of the tasting of craft beer (Fig. 9).

According to the survey (question 10), the preferred packaging remains glass (76%), followed by Keg & Draft (16%), cans (5%) and PET packaging (3%) (Fig. 10).

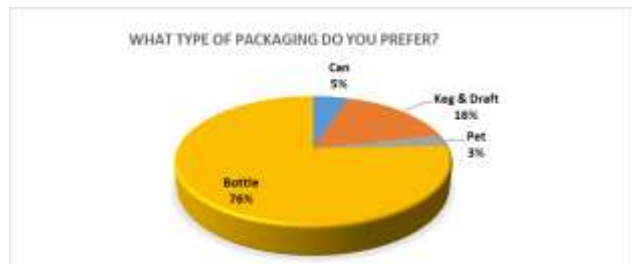


Fig. 10. Respondents' answers to the question: What type of packaging do you prefer?
Source: Survey results.

Question 11: "How do you prefer beer considering the amount of alcohol, 0% alcohol/ 2-3% alcohol/ 5% alcohol/ 5% alcohol/ 5% alcohol/ '+ 5% alcohol?' The answers rank the respondents' preferences as follows: 49% prefer the concentration of 5% alcohol; 27% of respondents go out for a lower amount of alcohol, 2-3%. An important percentage (14%) places beer with a percentage of more than 5% alcohol on the 3rd place in preferences. Non-alcoholic beer is also appreciated by an important percentage of respondents, 10% (Fig.11).

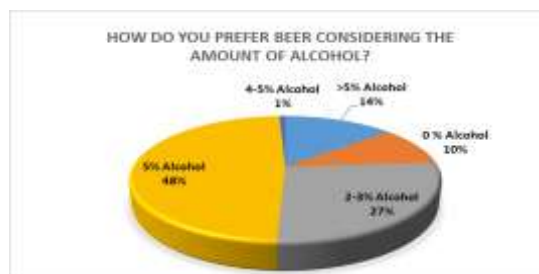


Fig.11. Respondents' answers to the question: How do you prefer beer considering the amount of alcohol?
Source: Survey results.

To question 12: "How do you prefer beer to be considering the color? Gold / Copper / Light Yellow / Brown & Black" Color plays an important role in the choice of craft beer, as it creates a visual connection

with taste expectations. The golden color is preferred by 54% of respondents, suggesting a light, fresh beer with a defined taste. Copper is preferred by 21%, light yellow color is appreciated by 14% of respondents, and dark beer, brown & black, ranks on the last places in preferences, with a favorability percentage of 11% (Fig. 12).

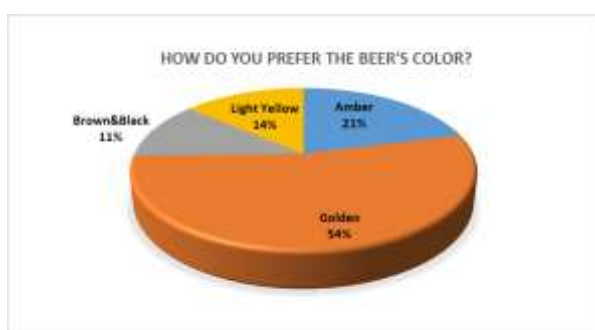


Fig.12. Respondents' answers to the question: How do you prefer the beer's color?
Source: Survey results.

Question 13: "How do you prefer beer considering the appearance?"

Clear, without opalescent and sediment/ Very clear, without sediment, with characteristic luster/ Slightly opalescent, with yeast sediment/ Opalescent, with sediment from yeast deposition"

The appearance of the beer is an indicator of the beer production process.

A clear beer suggests clear aromas, filtration or prolonged maturation.

The opalescent appearance is perceived as natural, artisanal, with little or no filtration. From the analysis of the answers, it results that very clear, sediment-free beer, with characteristic glossy is appreciated in a proportion of 41%, immediately followed by clear, clear beer with 37%.

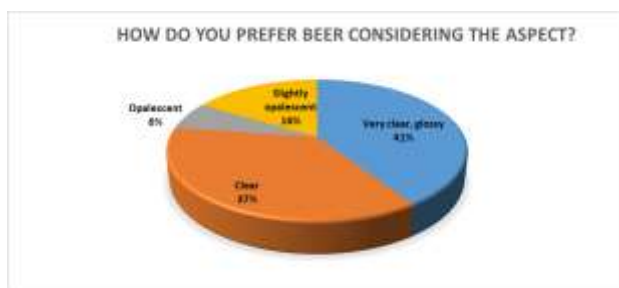


Fig. 13. Respondents' answers to the question: How do you prefer beer considering the aspect?
Source: Survey results.

Craft beer with a slightly opalescent appearance (16%) and the one with an opalescent appearance (6%) are less appreciated (Fig.13).

Question 14: What do you think about the following types of beer? Indian Pale Ale. Wheat Beer, Stout, Dark Lager, Pilsener – I Don't Know, I Dislike, Neutral, I Like.

The most famous beer, Pilsener beer, is also the most appreciated beer (48.57%). Dark Lager ranks second in the top of preferences (25%), with a small difference from Indian Pale Ale, which obtains a score of 24.29%, with the mention that the percentage of the "Dislike" factor for the Indian Pale assortment is 5%, compared to 15% for Dark Lager. Next is the "Wheat Beer" beer, which is appreciated by 19.29%, and in the last place is the "Stout" beer with 7.14%.

From the respondents' answers, it can be seen that almost half of them do not know the varieties of beer such as Indian Pale Ale (46.43%), Wheat Beer - 50%, Stout - 49.29%. 23-31% of respondents are neutral, not having a formed opinion about these types of beer (Fig. 14).

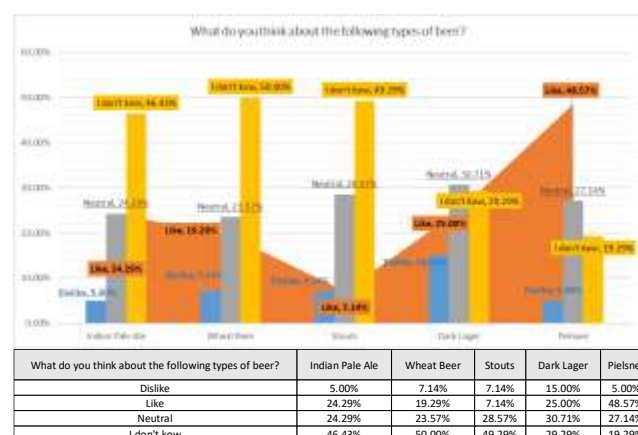


Fig.14. Respondents' answers to the question: What do you think about the following types of beer?
Source: Survey results.

Among the objectives of the research is to identify the profile of the craft beer consumer, an approach carried out in this section. Also, the initially established premises will be verified, comparing the results of the survey with the research hypotheses. It can be seen that some hypotheses have been validated, others have not.

H1: Consumers know little about the concept of craft beer and is directly related to their background, gender, age and education.

Partially validated hypothesis, craft beer is known among consumers and is directly related to the urban-rural classification, gender, age and education. The survey shows that craft beer is better known to males, from urban areas with age between 36-45 years, predominantly higher education.

H2: Consumers' preferences for craft beers differ according to gender, age, education. Most respondents consume craft beer occasionally, and the frequency varies with personal preferences, lifestyle.

Validated hypothesis, craft beer is consumed occasionally, several times per year and is preferred by males, with higher education, in urban areas.

H3: Drinking craft beer is perceived as a multisensory experience. Most respondents appreciate taste as the main criteria in choosing this type of beer.

Hypothesis validated, the results of the research show that 62% of respondents appreciate taste and consider it as the main attribute that leads to the choice of a certain type of beer.

H4: Craft beer is consumed in a variety of places, depending on the context, personal preferences and availability of the product. Respondents prefer to consume craft beer in pubs/breweries, in different social contexts.

Hypothesis validated, the result of the survey (44%) shows a preference for drinking craft beer in pubs/breweries.

H5 Craft beer consumers place great emphasis on the uniqueness and complexity of taste. The various flavors give authenticity, the most appreciated are those that contribute to the bitter and fruity taste.

Hypothesis validated. The results of the research show that bitter flavors (41%), followed by fruity ones (29%), are at the top of preferences in terms of taste.

H6 Consumers' preferences for beer differ according to gender, age, education. We expect significant influences to have age and education. Young people are attracted by the social and exploratory aspect of craft beer consumption.

Partially validated hypothesis. The results of the research show that craft beer is preferred by the 18-25 year old age segment, female people, with higher education (13%), followed, at a short distance, by male people, 36-45 year old segment, higher education graduates (12%).

H7 Respondents choose to consume craft beer driven by desire to try new drinks and experiment different tastes.

The hypothesis is partially validated, respondents choose craft beer because they consider it a quality beer, made from premium ingredients (34%), which offers a different experience in terms of taste (32%).

H8 The price that consumers are willing to pay for 500 ml bottle of craft beer is between 11-15 RON.

The hypothesis is confirmed, the respondents chose, with a frequency of 39%, the price variant between 11-15 RON, followed by the price variant between 16-20 RON (28%).

H9. Craft beer consumers get their information from a variety of sources; Social media plays an important role in the choice made by being the preferred source of information.

The hypothesis is not confirmed. The result of the study shows that the preferred source of information, based on which the consumption decision is made, is represented by recommendations from family and friends (55%), followed by social media (22%)

H10: Craft beer consumers prefer glass bottle, the packaging design plays an important role in the choice made

The hypothesis is validated. The preferred packaging is the glass bottle, the frequency of favorable responses being 76% of respondents, who appreciate the glass bottle for its ability to preserve the taste and aromas of beer.

H11 Alcohol content is important for craft beer consumers. Craft beer consumers choose a moderate alcohol content of 5% because they want to enjoy complex flavors without alcoholic strength dominating the experience.

The hypothesis is validated, the result of the survey shows that beer with an alcohol content of 5% obtained the highest frequency of favorable responses (48%), followed by

beer with alcohol content of 2-3%, which is preferred by 27% of respondents.

H12 Color influences expectations about the taste of beer, which is why it plays an important role in the choice of craft beer. Light colors, especially gold, are at the top of the preferences of craft beer consumers.

Hypothesis validated. The result of the survey shows that the golden hue of beer is important for respondents, obtaining the highest frequency of favorable responses (54%).

H13 The degree of clarity or opalescent is a visual aspect that attracts attention and gives clues about the manufacturing process and taste characteristics. Craft beer consumers are attracted by the slightly opalescent aspect.

Hypothesis invalidated. The results of the study show that respondents choose to consume a clear, bright (41%) or very clear (37%) beer. Only 16% of the answers indicate a preference for a beer with a slightly opalescent appearance, and 6% for an opalescent appearance.

H14 The most popular (pleasant) beer is represented by the Pilsener beer. The consumption pattern and consumer loyalty differ according to gender, age and education. Hypothesis confirmed. Pilsener beer is the most pleasant beer. Wheat Beer, Stout, Indian Pale Ale are unknown to almost half of the respondents (50% Wheat Beer, 49.29% Stout, 46.43% Indian Pale Ale). Dark Lager ranks second, after Pilsener with a percentage of 25%. Stout beer is the least pleasant beer, with a percentage of 7.14%. Preferences differ according to gender, age and education.

Craft beer consumer profile

The profile of the craft beer consumer is represented, for men, by a person aged between 36-45 years, and for women, by a person aged between 18-25 years, both genders have graduated from higher education and live in urban areas.

These results are in line with other ones, showing that the average consumer is predominantly male, in his thirties, having higher education and earning quite averagely [8].

CONCLUSIONS

The article researched the preferences of Romanian consumers towards craft beer, in order to identify the main consumption trends, the information collected being used by producers to substantiate marketing decisions and develop strategies for product, price, promotion and placement of craft beer.

From the research, there are some important conclusions: most respondents know craft beer, they usually find out about it from friends or family. Craft beer is occasionally consumed, usually in pubs. Respondents appreciate the taste and fullness of a craft beer and prefer the bitter taste, the golden color, the characteristic clarity and gloss, a low alcohol content and the glass packaging. They are willing to pay 11-15 lei for 500 ml of craft beer.

Limits of research

The structure of the sample by age does not respect the structure of the total population, with the distribution of frequencies being higher in the 18-25 age segment and lower in the 56 years plus age segment. These differences are justified, however, by the fact that the questionnaire was administered online, and people over 56 years of age use the computer less, compared to younger people. A consequence of the same fact is the non-compliance with division in case of the sample structure by occupational status, pensioners having a higher share in the total population compared to the sample, and students a lower share in the total population compared to the sample.

Exceeding the maximum error accepted by statistics for extrapolating the results, 5.8% (current survey) versus 5%, is also a limitation of the research; the results obtained being valid for Bucharest metropolitan area, a center of social and economic polarization.

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