

Guest editorial: Craft beers: consumer perception, motivation and demand in a fast-rising market

161

Whether observing the scene that materialises in the background of a canvas by connecting seemingly unrelated points is a curious and pleasurable experience, painting it to reflect reality is undoubtedly a captivating but daunting challenge. We are honoured to be guest editors of this special issue of the *IJWBR*, in which we are invited to unveil the painting of craft beer (CB) studies in economics and marketing. Thus, this call for papers was inspired by the intention to frame and strengthen the knowledge of managerial and marketing dynamics in the CB sector worldwide and to serve as a valuable reference for business operators.

An analysis of scholarly publications that appear after researching the term “craft beer” in one of the leading abstract and citation databases (Scopus, 2024), limiting the research to English-language articles in the fields of business, management and accounting, social sciences, economics, econometrics and finance and multidisciplinary research area, returned 387 papers in the past two decades. Notably, the researchers’ contributions soared after 2016, shifting away from 16 articles towards over 50 studies in 2017 and 2020. According to the retrieved data, approximately 31% of papers were published by researchers from the USA and 12% from the UK, two iconic countries for small and micro-breweries (Cabras and Bamforth, 2018). Italy (approximately 9% of the papers), Brazil (approximately 5%) and Australia (approximately 4%) followed the top two in this ranking, while contributions from countries with a consolidated beer culture (e.g. Mexico, Germany, Ireland and the Czech Republic) were surprisingly limited.

In their insightful scientific reviews on CB-related subjects, Baiano (2021) and Durán-Sánchez *et al.* (2022) brought out researchers’ main topics of interest over the past decades. Four main thematic areas are particularly relevant to this special issue. Issues on consumers’ profiles and motivations of CB drinkers continue to be a significant theme in marketing research. The sensory and hedonic evaluation of CBs and the CB pairing with food remains pivotal in exploring consumers’ preferences. Again, growing attention is given to consumers’ perceptions and sensibility towards environmental sustainability solutions in CB production.

In this special issue, we called for contributions in consumer behaviour science fields to provide a broader understanding of the CB phenomenon, covering topics such as, but not limited to, CB’s choice motivations, hedonic aspects of CB’s choice, CB perception, emotion and expectation, food and CB pairing and CB and tourism. The seven papers that comprise this special issue bring valuable theoretical and managerial insights into the marketing and economics of CBs. They are written by researchers from the traditional major brewing countries, such as the USA (Norris *et al.*, 2024), Mexico (Castillo-Ortiz *et al.*, 2024), as well as from Italy (De Pascale *et al.*, 2023), Brazil (Cassago *et al.*, 2023; Lourenco and Piotto, 2024), Australia (Tham *et al.*, 2023) and Hungary (Bakucs and Fertő, 2023). The accepted manuscripts cover many of the abovementioned research areas, enriching the actual knowledge in the field of consumers’ profiles and motivations (De Pascale *et al.*, 2023), sensorial and hedonic aspects of CB consumption (Cassago *et al.*, 2023; Castillo-Ortiz *et al.*, 2024), consumers’ perceptions and sensitivity towards environmental sustainability



solutions in CB production (Lourenco and Piotto, 2024; Norris *et al.*, 2024), CBs and tourism (Tham *et al.*, 2023), and the geographical economics of CB sector (Bakucs and Fertó, 2023).

The first paper by Cassago and colleagues is titled “The impact of hop origin information on the sensory and hedonic evaluation of highly involved consumers of craft beer”. Motivated by the scientific evidence of a possible terroir effect on the flavour of CBs (Atallah *et al.*, 2021), using a between-subject tasting experiment, the authors explore the impact of the origin of hops (i.e. imported vs locally grown) on the sensory and hedonic evaluation of CB consumers. This study demonstrated that a sample brewed with locally grown hops scored higher in the consumers’ hedonic evaluation. Findings suggest that origin information and specific CB sensory attributes such as aroma, bitterness, dryness and refreshments influence women’s hedonic evaluation, whereas the hedonic ratings of men are only influenced by the extrinsic cues referred to hop’s origin information. Thus, the findings confirm that industry managers should develop appropriate marketing strategies to capture gender-specific preferences in CB consumption. In particular, the CB segment could be an entry point for women into the typically male-dominated beer market. In addition, the results are relevant for policymakers to support local hop production and the local craft brewing economy.

Guided by the goal of uncovering the factors that have triggered the creation, management and marketing of CB tourism, Tham and colleagues, in their study “Tapping into flavourful journeys: a systematic review and application of craft beer tourism frameworks”, conducted an extensive systematic literature review to unpack the extant body of knowledge on CB tourism from the viewpoint of gastronomic tourism. The authors proposed a novel conceptual model highlighting the current focal areas and gaps to inform future studies and managerial implications. Several relevant issues emerge from their study. For example, scholars must reinforce the link between craft breweries and tourism from micro, meso and macro perspectives. Furthermore, more efforts must be made to develop, promote and strengthen CB tourism, including links between a resource-based view and building a gastronomic identity (Harrington, 2006; Zhu and Yasami, 2021). As noted by the authors, closer integration between craft breweries and the other tourism industry sectors is needed to provide a deeper engagement with CB tourism and strengthen it.

For breweries, a clear understanding of the needs and preferences of the different consumer generations, characterised by different drink-related lifestyles, is essential to align their production and communication strategies. In their study titled “Craft beer preferences among digitalians in Italy”, using a three-step logistic regression, De Pascale and colleagues explore the key determinants influencing CB consumption of Digitalians, the new generation known as “Gen-Z”. The findings suggest that Digitalians prefer amber and dark CBs and are attracted to beers with low/no alcohol content. The authors also pointed out that the role of gender becomes noteworthy only when considering food pairing. Specifically, women are more likely to consume CB when paired with pizza or fast-food meals such as sandwiches. Thus, this paper expands research on CBs-food pairings, focusing on a specific cohort of young consumers, contributing to developing targeted marketing strategies.

In the context of the cue utilisation theory (Piqueras-Fiszman and Spence, 2015), Norris and colleagues used a single-factor between-subjects experiment with four conditions to examine the consumers’ perception and willingness to purchase CB based on innovative and sustainable secondary beer packaging. The paper “Hold my beer! Consumer perceptions of innovative and sustainable secondary packaging” provides attractive cues that enrich the CB sector’s literature on beverage packaging styles and formats. Firstly, the secondary packaging style does not directly affect consumers’ willingness to buy CB, highlighting that the intrinsic product aspects, such as taste, aroma and flavour, remain the main key drivers

of the consumers' intention to buy CB. Secondly, secondary packaging indirectly influences consumers' intention to buy CB by influencing the consumer perception of packaging innovation. That means that when consumers perceive packaging as innovative, they also perceive it as sustainable, which stimulates their willingness to buy CB. This study offers interesting practical implications for both CB producers and the packaging sector operators. They must be aware of which packaging styles to adopt to meet consumer needs and influence their purchase decisions.

Castillo-Ortiz and colleagues, in their study "Forecasting the Mexican craft beer market: an integrated consumer perception conjoint analysis approach incorporating price and product attributes", use conjoint analysis and market simulation to identify and compare the importance of CBs attributes Mexican consumers prefer to forecast the probability and market share of CB products in Mexico. The authors demonstrate that Mexican CB consumers are willing to pay a premium price for the high alcohol content, low bitterness, intense aroma and dark colour of this alcoholic sparkling beverage. These results partially align with De Pascale and colleagues' study, highlighting how the new consumers' preference trend shifting away from the "yellow fizz" to "amber and dark fizz". The study's findings offer breweries insight into how such information can improve their targeting and positioning strategies by aligning CB production with consumer expectations.

In "Brewing sustainability: assessing environmental concerns and consumers' attitudes towards sustainable craft beer purchase intentions", Lourenco and Piotto used a quantitative method (i.e. PLS-SEM) to examine how Brazilian consumers' perception of environmental attributes impact their CB purchase intentions. The authors highlight how specific sustainable attributes affect consumer purchase intention, such as water saving, carbon footprint reduction, organic farming of raw materials used by brewers and local sourcing. In line with [Cassago et al. \(2023\)](#) and [Norris et al. \(2024\)](#) from this special issue, this study underscores the growing consumer preference for products that align with environmental values and local sourcing and the critical role these preferences play in shaping the CB industry. The findings highlight the importance of effectively communicating these attributes better to intercept the sustainability-oriented behaviour of young adults in Brazil, underscoring the relevance of innovations in packaging.

Finally, Bakucs and his co-author focus on "The geography of the craft beer scene in Budapest". Specifically, the paper investigates the locational determinants of the CB industry in Hungary from 2003 to 2022. Their analysis reveals that the geographical distribution of craft breweries in Budapest reflects the intertwined links and synergies between demand, urbanisation externalities, and agglomeration effects, confirming several hypotheses drawn from the literature. Firstly, areas with strong purchasing power, high population density and high educational institutions significantly influence the location choice of craft breweries. Secondly, breweries might prefer areas with lower rent competition, which could explain their preference for former industrial zones. Finally, the study demonstrates the positive spillover effects within the CB industry despite a significant effect that might be observed only after a while. This paper widens the knowledge of the geographic economy of craft breweries, offering them insightful managerial implications.

In summary, CB research encompasses many research topics, and this special issue adequately mirrors this aspect. Although the papers' findings may not be expected to be generalisable to other settings, we have to remember that this should not undermine the rigorous scientific research process that characterises each of them. After the "long wave" of the so-called "CB renaissance," in which the beer industry has experienced a significant increase in CB demand pushed by specific consumers' motivations and needs, brewers must reflect on how to drive their business in the future. The colour revealed by the thought-

provoking papers in this special issue points to trends and suggestions to help breweries interpret the new wave looming on the horizon and researchers advance their studies. It seems to be a “foamy, non-alcoholic and dark fizz” wave, and according to much forecasting, it is probably not as high and long as the previous one; this means that not everyone will surf it, and many will only remain soaking, waiting for yet another wave. What emerges from this special issue is that it will be crucial for breweries to develop effective networking among breweries and other local economies to produce a positive spillover effect on the economy of the CB sector. In line with the 2024–2029 Manifesto for a Sustainable Brewing Future, it will be crucial for the CB sector to focus on studies, investments, and innovative solutions for low/no-alcohol CB products as a new attractive alternative that can encourage consumers to change their consumption, aligning business with public health objectives (The Brewers of Europe, 2024). Again, breweries must focus on innovative solutions and effective marketing strategies to align their production with consumers’ increasing environmental awareness and the roadmap for a green transition toward meeting the EU’s 2030 climate goals. Finally, the market trend towards hyper-differentiate CB production has made this situation akin to a hamster wheel: once you get on, it is difficult to get off or sustain the rhythm economically. Thus, breweries must identify consumer needs before losing their identity to surf the wave and get momentum for the future.

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