

‘Craft’ as a contested term: Authenticity and meaning among British beer consumers

Introduction

This chapter analyses associations consumers attach to the ‘craft’ label in the context of the booming craft-brewing industry. Craft has long been employed as a symbol of distinct artisanship in this industry, but there are currently claims of a ‘craft beer revolution’. The increasing number of craft breweries is in alignment with consumers’ increasing need for authenticity (Kadirov, Varey and Wooliscroft, 2014). Authenticity is becoming one of the cornerstones of contemporary marketing (Brown, Sherry and Kozinets, 2003).

In this study, we analyse brewing industry definitions of craft, and argue that the term has been used and abused by both brewers and consumers, to signify much more than the dictionary perspective of attachment to traditional methods and skills. Through 16 interviews, we reveal how the current ambiguity around craft is evident in its usage by consumers, via locating our findings within theoretical debates on authenticity.

We argue that this ambiguity is a challenge for the industry as the term is in danger of losing its original meaning. Without a clear definition of this signifier or clarity in its everyday use, it becomes challenging for stakeholders to even discuss the topic, or to plan sustainable growth. Ambiguity in the use of the term craft beer also makes it impossible to define what is authentic and what it is not.

The rest of the chapter proceeds as follows. First, we examine existing conceptualisations of the term ‘craft’, focusing especially on brewing contexts. Then we review how authenticity and its different meanings link to consumer-product interactions, before we articulate the objectives of our empirical work and its methodology. We then present our findings, and conclude with suggestions for future research.

'Craft' and 'craft beer': diversity and ambiguity in production and consumption

The terms 'craft' and 'craft beer' have witnessed growing interest recently from the academic community as well as practitioners and policy-makers. This can be attributed to the increasing number of products claiming to be 'craft', as well as to craft products becoming trendy lifestyle choices (Gust, 2016). In marketing, craftship¹ is also connected to luxury brands and products in consumer minds (Tynan et al., 2010), making it a valuable branding tool for many companies (Robinson, 2017). However, consumer interpretations of the term, especially in relation to brewing, have been neglected. Industry definitions of craft (and craft beer) are also unclear (Pöllänen, 2013). This lack of clarity creates risks for the sector's identity and quality standards. To achieve a better understanding, we turn first to scholarly understanding of the term 'craft, the focus of which is divided between perspectives of makers/producers and of consumers; we review these separately below.

The official definition by the Oxford English Dictionary (2017a) adopts a producer-focused view, defining 'craft' as "*an activity involving skill in making things by hand*". This aligns with Hanks's (1979) definition of craft as to "*make or fashion with skill, especially by hand*". Campbell (2005) considers the term 'handicraft', of which 'craft' is a shortened version, as something that is produced 'by hand' or 'by foot' and is directly under the control of the worker. In this context, 'craft' is connected to an activity in which a product is designed and made by someone who "*invests his or her personality or self into the object produced*" (p. 27).

Research has examined handcrafters' motivations (Johnson and Wilson, 2005), meanings of craft as experienced by home-based craftspeople (Mason, 2005), makers' description of craft as an occupation (Pöllänen, 2013, Dickie 2003), and the significant intrinsic values which drive them (Thurnell-Read, 2014). All of these studies focus on the

¹ We consciously use the term 'craftship' and 'workship' in lieu of the more gendered terms 'craftmanship' and 'workmanship'.

effects crafting has on the producers, starting from the position that crafting as a process allows makers to develop their personal identity (Johnson and Wilson, 2005; Pöllänen 2013). Overall, this body of work concludes that products made by craftspeople are made with love and are personalized by the makers' personal history (Mason, 2005).

Within these production-focused perspectives on the term 'craft', we observe disparities in its conceptualisation, as its meaning seems to be context-dependent. Similar ambiguities to those manifest in the craft beer industry are evident elsewhere. Craft souvenir makers have also had difficulties in finding a working definition (Peach, 2007). In Scotland, the craft community has expressed concerns that the quality of product and design integrity may be reduced as demand from tourists increase (Peach, 2007). Craft souvenirs are defined as locally produced, made by hand, and more expensive than mass-produced souvenir goods. However, mass tourism shapes the craft industry as the craftspeople orient production more towards volume, rather than quality or artistic experimentation (Peach, 2007).

The aforementioned diversities and ambiguities associated with the term 'craft' are not surprising and we immediately see space for multiple interpretations. What exactly is the 'amount' of skill? How much needs to be done 'by hand' to be counted as craft? Most importantly for the context of this study, when we look at the Oxford Dictionary definition of a 'craft beer' as "*a beer made in traditional or non-mechanized way by a small brewery*" (The Oxford English Dictionary, 2017b), confusion still remains. How 'small' must the brewery be, and in what ways exactly (brew strength, number of employees, turnover, etc.)?

This lack of clarity is evident in scholarly work and in definitions provided by industry representatives such as producers and policy/support bodies. In brewing, size seems to be a key point of conflict. In March 2014, BrewDog, one of the biggest players in the craft beer movement, proposed a definition that focused on four categories: authenticity, honesty, independence, and commitment. BrewDog excluded size and type of production specifically

so they would be included in their definition of a craft brewery (BrewDog, 2014), and unsuccessfully presented the definition at the Annual General Meeting of the Society of Independent Brewers (SIBA). In August 2016 SIBA also launched a new accreditation scheme to claim back the meaning of craft and offer a “stamp of approval” to independent British breweries with a capacity requirement of less than 200,000 hectolitres annually that abide to SIBA’s Manual of Good Brewing Practice (Woolfson, 2016).

Industry definitions therefore seem to highlight that a craft brewery should be four things: 1. a certain size, 2. authentic - demonstrated for example through use of high quality ingredients, 3. honest - ingredients and origin need to be listed on the labels, and 4. independent and committed to craft, in that at least 90% of production must be craft beer. However, there is not a consensus that satisfies all parties. In addition, such producer-focused conceptualisations of craft ignore consumer interpretations. For that reason, we now turn to interpretations of ‘craft’ and ‘craft beer’ from a consumption-focused perspective.

In consumption, craft activity is considered as something to which a *consumer* brings skill, passion and judgement. Craft consumers are motivated by a desire for self-expression (Campbell, 2005), and have a specific profile and attributes (Hu and Yu, 2007). Hu and Yu (2007) identified three segments of craft consumers, differing from each other based on perceptions of the importance of craftwork, sensuous appreciation, cultural linkage, and ease of handling. The three segments are shopping enthusiasts, shopping lovers, and indifferent shoppers, and it was shown that the craft shopper or craft consumer segment is heterogeneous, with people interested in different dimensions of craft consumption.

Numerous studies have examined the craft beer consumer, with particular focus on three research areas: 1) choices between craft and commercial/industrial beers (Aquilani et al., 2015), 2) situational appropriateness and product familiarity (Giacalone et al., 2015), and 3) habits, attitudes and motives (Gomez-Corona et al., 2016). The constant comparison

between craft and industrial beer permeates discourses around craft beer consumption. Donadini and Porretta (2017) report on an extensive study of craft beer in contrast to industrial beer. Similarly, Gómez-Corona et al., (2016a, 2016b) identified three clusters of consumers based on a number of dimensions, with one extreme being ‘industrial beer consumers’ and the other ‘craft beer consumers’.

This body of work suggests that we should have a very clear understanding of what craft beer is and what industrial beer is, yet existing research fails to account for the exact meanings and interpretations that consumers attach to the term ‘craft’. Indeed, research commissioned by SIBA presents some interesting findings (SIBA Admin, 2016): i) approximately 46% of beer consumers expect craft beer to be made by small or micro-breweries, hence size appears as a crucial dimension of craft beer for only half of respondents; ii) only 14% of consumers expect craft to be produced locally; iii) 10% of them are not certain about the actual meaning of the term. Therefore, consumers’ interpretations of craft in relation to brewing products lack clarity in similar ways to the lack of consensus amongst industry representatives.

In this study, we account for those multiple interpretations by adopting a consumer culture theory perspective, through which craft consumption is viewed under the lens of consumers’ search for authenticity. Authenticity is rarely adopted as an empirical perspective on craft consumption, yet it can provide a valuable perspective from which to examine consumer-based discourses and interpretations of ‘craft’ activities (Campbell, 2005).

Authenticity

Authenticity has received significant multidisciplinary attention (Grayson and Martinec, 2004). There may be as many definitions as those who write about it (Taylor,

2001). This suggests it is best treated as a social construct, something observed rather than a property inherent in an object, person, or experience (Beverland and Farrelly, 2010).

Authenticity and consumption are closely linked (Beverland and Farrelly, 2010), as consumers actively seek authentic persons, products, brands, places, businesses, and experiences (Kadirov, Varey and Wooliscroft, 2014) to construct meaning (Emmons, 2005). Postmodern market characteristics such as globalisation, hyperreality and deterritorialisation (Arnould and Price, 2000) together with standardisation and homogenisation in the marketplace (Thompson, Rindfleisch and Arsel, 2006) are key factors increasing consumers' interest in, and needs for, authenticity.

Wang (1999) distinguishes between two kinds of authenticity: the authenticity of objects and existential authenticity. Existential authenticity is activity-based, both intra-personal and interpersonal. As an observed rather than inherent property, the authenticity of a concept, product, service, or experience lies in the minds of consumers and is not something that producers can build into it. Thus, while a craft worker is someone who designs the products, selects the production materials, and personally makes the object (Campbell, 2005), authenticity is also dependent on the goals of the consumer (Beverland and Farrelly, 2010).

What makes authenticity so crucial in consumption settings is that consumers' perceptions of authenticity in a product or experience can influence loyalty (Kolar and Zabkar, 2010), thus providing important incentives to makers to associate their offerings with it. In addition, Lu et al. (2015) demonstrated that consumers' perceptions of authenticity of ethnic restaurant brands is a critical determinant of brand equity, which in turn has a significant impact on consumers' brand choice intentions.

As a result, managers constantly seek to manipulate brands to appear more authentic and respond to consumers' expectations of authenticity (Kadirov et al., 2014). However, marketers should perhaps not focus on how to manipulate products and brands, but instead

“respond to citizens’ quest for authenticity in the marketplace by a means of constructing authentic existence and practices” (Kadirov et al., 2014, pp. 73). Typical in this search for authenticity is consumers’ quest to find something genuine, real and true (Beverland and Farrelly, 2010; Arnould and Price, 2000; Thompson et al., 2006), suggesting this is where issues with the nature of authenticity, or defining what authentic is, lie. As Beverland and Farrelly (2010, p. 853) eloquently state: *“authenticity is impossible where common standards for what is real or fake are lacking”*.

In consumer culture theory, Campbell (2005) connects the search for authenticity to the craft consumer by proposing that craft consumption is regarded as a means of self-expression and authenticity in a world dominated by commodification and marketisation. For instance, uniqueness, workshop, aesthetic and use, cultural and historical integrity, as well as the characteristics of the craftsman and the shopping experience associated with craft souvenirs, are contributing factors to its authenticity (Littrell et al., 1993). Cohen (1988) nuances this, summarising three core viewpoints of the meaning of ‘authentic’ culture in tourism: commoditization, staged authenticity and authentic experience, concluding that commoditization is not the end of an authentic experience. The tourism literature suggests that consumers do not seek in-depth knowledge and that a few core traits which are perceived to be authentic could be sufficient (Cohen, 1988). Thus, we can conclude that we need to understand the elements that make craft beer authentic, especially the core ones.

In line with the above literature on authenticity and its relation to craft consumption, we can make some interesting observations about the term ‘craft’ in the brewing industry, and about the value of using authenticity perspectives to understand consumer interpretations of ‘craft’ beer. First, as craft breweries are predominantly locally-based businesses that mainly cater for their relatively confined regional markets and raise sentiments of local pride, it is natural that they (and their products) are regarded by consumers as opposing forces to a

globalising world. This places craft breweries very clearly within the authenticity debate (Campbell, 2005). Second, craft breweries are often differentiated from larger, multinational beer producers in terms of the culture of production and customers. Yet in recent years we observe a rising number of larger breweries tapping into the craft beer market via takeover of craft breweries or via developing their own ‘craft’ beers. This further challenges the notion of authenticity, and what is meant when academics, practitioners, and consumers refer to ‘authentic’ craft beer products and experiences.

In sum, then, we have argued that there is a lack of a broadly accepted definition of those terms, but that the most crucial matter is the neglect of consumers’ interpretations, which could inform further the ways employed to communicate about those products and experiences. This lack of understanding is significant for both academics and practitioners. The next section outlines the aims of this study, and its theoretical and practical value.

Purpose and Value of the Study

Given the little in-depth information in existing literature regarding consumers’ perceptions of the term ‘craft’ when it relates to beer products and experiences, and the value consumers attach to this signalling term, the current study seeks to explore consumers’ interpretations of the term ‘craft’ in relation to beer products and experiences via adopting authenticity as its theoretical lens. We argue that this perspective can uniquely inform discourses on craft (beer) consumption, as it can lead to further understanding of what ‘authentic’ craft beer experiences are and how they are represented in consumers’ minds.

Conceptually, this research provides unique in-depth insight into consumers’ interpretations of the term ‘craft’ in relation to craft beer products and experiences, by exploring how perceptions might differ for different groups of consumers, as recommended by previous literature (Ihatsu, 2002). In particular, we capture diverse connotations associated

with ‘authentic craft experiences’ by consumers of different age and gender groups, as well as of varying levels of self-acclaimed beer knowledge. This is significant in enriching broader scholarly understanding of the term ‘craft’, and in clarifying the relative importance of perceived attributes of craft beer in consumers’ minds.

Practically, we provide insight to practitioners, industry associations and policy/support bodies with regards to consumers’ interpretations of the term ‘craft’, and what they perceive to be authentic craft experiences in relation to brewing products. This is crucial given that existing efforts to define those terms have been constrained to debates within the supply side. In this phase, where the craft beer industry is booming, ensuring that all key stakeholders’ perspectives are accounted for is vital in order to reach a joint understanding of those terms, and most importantly, to establish and maintain quality standards.

Methodology

We adopt a subjectivist perspective, in that reality is effectively created by social actors, actions and perceptions (Ortner, 1984; Geertz, 1983; Von Krogh and Roos, 1995). Meaning is created through the interaction of social actors, which is the result of adjustment to the unique external environment and to other individuals (Arbnor and Bjerke, 2008; Earley and Singh, 1995; Watkins, 2010). We used an inductive approach to develop our analysis, via discovering empirical patterns, themes and categories (Vaismoradi, Turunen, Bondas, 2013).

Face-to-face, semi-structured interviews with 16 consumers were conducted (Myers, 2013; Merriam, 2014), as interviews can provide novel insights into a topic compared to quantitative data collection, which was the approach of earlier studies in this area (Gómez-Corona et al., 2016a, 2016b; Donadini and Porretta, 2017). The applied sampling technique here was non-random judgment sampling. More precisely, convenience and snowball sampling approaches were followed, something often used in qualitative research (Pesonen,

Komppula and Riihinen, 2015). It was crucial that the respondents represented different age groups, genders, and varying level of beer knowledge, because it is more important to generate interviewees who represent various voices than achieving a specific sample size (Myers and Newman, 2007). Table 1 presents the profile of the respondents.

Insert Table 1 about here

Data were collected until theoretical saturation was achieved (Marshall, 1996). All interviews were recorded and transcribed, and supplemented with researchers' notes. We applied thematic analysis to identify core constancies, meanings, recurring words and themes, according to the stages proposed by Fereday and Muir-Cochrane (2006) (see Figure 1).

Insert Figure 1 here

In the first stage, a code manual was developed, and codes were written with reference to Boyatzis (1998) as follows: 1) Naming/labelling the code; 2) Defining the theme, 3) Describing how the theme might occur. After developing the initial code book (the first 9 codes in Table 2), those codes were applied to the first set of data from 8 consumers. Then, the same codes were applied to the next 8 interviews. Through this reliability test, the first set of codes were confirmed to apply to the dataset as a whole. However, four additional codes were identified (highlighted as "NEW" in Table 2). Finally, for stages 5 and 6, discussion amongst co-authors helped to combine and re-test the coding.

Insert Table 2 about here

Findings and Discussion

Some of the attributes of what consumers understand by the term ‘craft beer’ have been previously identified (e.g. the importance of the size of the brewery). Such associations are confirmed in our data. However, these attributes appear to have emerged from comparison of ‘craft’ beer with beer labelled as ‘industrial’, and it seems this comparison has acted as a barrier to scholarly research to account for the exact meanings and connotations that consumers attach to the term ‘craft’. As our interviews reveal, there are associations that consumers make about ‘craft’ beer products and experiences that have not been previously identified, such as the importance of variety of beer products. Figure 2 presents an illustrative representation of the different meaning categories which our analysis revealed.

A close observation reveals that there are attributes associated with ‘craftiness’ in brewing contexts that relate to the producing firm (brewery), the producer (brewer), the method of and approach to production (brewing), and the final product (beer). While this could have been employed as a way to structure the presentation of our findings, we have opted to establish first the ambiguity of the term craft beer as experienced by consumers and subsequently to organise our findings using the prominence of each association as the guiding structure. In this way, our results provide indications about the relative importance of certain attributes of craft beer. The next sections present those findings in more detail.

Insert Figure 2 here

Craft beer as an ambiguous, diverse, and abused term

Our analysis reveals lack of consensus and diversity of views about what ‘craft’ in relation to brewing products and experiences represents, or should represent, that was materialised independent of, and across, all levels of self-proclaimed knowledge of craft beer.

This diversity further emphasises that the need to reach a deeper understanding of the term ‘craft’ in this specific context is imperative, in order to inform the discussion around the development of a definition that will take into account all key stakeholders’ perceptions.

Interviewees readily admitted lack of knowledge or understanding about the term, which demonstrates that ‘craft’ can be attached to any beer products and experiences without clear standards. The majority of our respondents appeared confident that they had great awareness about craft beer as a product category and had quite strong and passionate personal views, both positively- and negatively-inflected. In other words, consumers were either unclear of what the term refers to, or expressed very strong and diverse opinions about what it entails. This mix of ambiguity and diversity highlights the blurred boundaries around the term ‘craft’, and jeopardises the industry’s ability to safeguard quality and continue legitimising premium prices for craft beer consumption in the long term.

However, while most consumers have strong (albeit different) views about what the term should represent, that does not preclude them from recognising that the term has been abused, with many considering that we will perhaps never reach a common understanding of it:

“The most misused and misunderstood term in the whole beer industry. It is generally used to mean keg but to me it should not mean keg, it should be about the way it is produced, but it is never going to be defined like that because the multinationals have taken on craft as a term... it is never going to be defined. So, I find it is a marketing ploy and nothing more.” (C5)

“But that [the term craft] has been hijacked by bigger producers who are saying they are producing craft although they producing beer left right and centre. It’s been replacing the authentic breweries. I am still falling back to it and I am still drawn to it but you are wearier of it, falling victim to it. You might be ‘yea ah right I take that away’ but then you find out that it’s made by a big brewery.” (C1)

Most illustrative of the ambiguity of the term is that, even in those passionate statements where consumers agreed on the term ‘craft beer’ being hijacked or abused, there are still multiple connotations assigned to it. Craft was associated to the style of beer or the

type of container it is enclosed in, or directly connected with the size of the brewery and its production. Having illustrated therefore the lack of consensus around the term, we now proceed to examine the various connotations consumers assign to it.

Craft beer linked to size of brewery and production

As shown, consumers consider the term ‘craft’ to have been appropriated and misused by ‘big’ breweries or multinationals. In theory, there is nothing that stops large, established breweries making similar beers to those of micro-breweries: they can build similar facilities, hire people with the necessary skills, buy the same ingredients, and make similar beer. Yet, from the consumers’ perspective, beer made by larger companies is a marketing ploy and is not in line with their understanding of the term ‘craft’ beer.

For the vast majority of our participants, the size of the brewery is a key criterion for considering a certain beer or brewery as ‘craft’. It was widely observed that ‘craft’ is a type of beer produced by small-sized breweries, which can only produce in small quantities or batches each time:

“... for me craft means small, unique, [...], it’s small batches, quality.” (C1)

“Small batch, it’s up and coming, its more definable; the same with authentic and provenance.” (C2)

“Ahm... anything that is probably new or ... what micro-breweries are making. It is important to me. I would prefer it over mass produced beer” (C10)

“... making a smaller batch...” (C11)

Moreover, consumers suggested that archetypical craft beer products and experiences are not simply those offered by small-sized breweries, but more specifically, those provided by small-sized breweries that are independent from multinational beer companies. This distinction introduces a new dimension to our understanding of consumers’ perceptions of craft: that of brewery and production size (micro or small) being interdependent with nature of brewery ownership (independence from multinationals or bigger players), as indicators of

authentic ‘craft’ beer products and experiences. These indicators could therefore be regarded as primary factors taken under consideration by consumers during their decision-making processes. Our respondents also referred to the frustration they feel when realising that a beer they purchased considering it was craft is in reality made by larger producers. This feeling of deceit suggests that consumers have certain expectations about craft beer products and wish for greater control in making informed purchasing decisions.

As mentioned earlier, the size of the brewery and production has been identified as an important factor in beer industry efforts to define the term ‘craft’ (e.g. in SIBA’s seal of craft beer). Brewery size and independence from larger players are also included in official definitions of the term established by associations in other countries. In the USA, the world’s largest craft beer producer (Craft Brewing Business, 2017), craft beer is defined by two criteria: i) the brewery needs to be independent, ii) annual production should be of 6 million barrels of beer or less (Brewers Association, 2017). The second criterion however, the introduction of a numerical value as an upper limit of production size, can be considered controversial, as it has been steadily increased in the previous years (CNBC, 2013), and critics seem to suggest that this has purposely been done to keep certain breweries within the ‘craft’ category (e.g. Boston or Sierra Nevada). This is an indication of the power that larger brewers have on key decision makers in the industry.

That larger or multinational players are trying to push into the growing craft beer market is common knowledge among brewers and consumers alike, as demonstrated during the interviews. Indeed, as shown earlier, consumers often perceive the term ‘craft’, at least in this context, to be a marketing ploy. However, our analysis has also made very clear that consumers consider the small size of the brewery and of production in conjunction with independence from larger or multinational beer companies as a crucial attribute of ‘craft’ here, and this is a key factor taken into consideration when making ‘craft’ beer purchase

decisions. The fact that consumers are very passionate about craft beer not being produced by larger players, including multinationals buying up smaller breweries, is also evident by recent examples of consumer boycotting 14 “imposter” beer brands (Business Insider UK, 2017). Overall therefore, both small size and ownership independence will need to be linked to definitions of craft beer, to ensure consumers’ viewpoints are accounted for.

Attention to quality, art, passion, innovation, and variety as key attributes of craft beer

Our analysis also revealed that there were many additional key connotations relating to the producer, the method of production, and the final product. In consumers’ minds, these attributes were crucial in order to consider a craft beer as truly authentic.

First, our interviewees considered that craft beer products stand at the end of a process permeated with continuous attention to quality, in relation to ingredients used and processes followed:

“...as long as it is produced with top quality ingredients and is done properly, it is a craft beer.” (C7)

This aspect is covered by SIBA’s ‘seal of craft’, as it is stated that in order for a craft beer to be authentic, it should always use high quality ingredients, which should all be listed along with beer origin on the label in order to ensure transparency and help consumers make informed decisions (SIBA Admin, 2016). However, our interviews highlighted some additional relevant connotations that have thus far not been covered in industry attempts to define the term. Participants considered that it was not only the high-quality ingredients or the attention to the process of brewing that made a beer worthy of the label ‘craft’, but also the art behind the production process, the expertise and skill involved in timely and appropriate combination and addition of the right ingredients:

“Each brewery varies, how they decide when to add the ingredients. I can see the art behind it a lot more.” (C3)

“What I assume from what I heard they are taking different bits and make something new.” (C4)

The ‘art’ and ‘expertise’ that are instilled in the brewing process refer to the ability to uniquely combine ingredients, and to the continuous and passionate creativity and experimentation that always leads to new products, and new experiences for the consumers:

“Craft in beer ... ahm yea I guess small not even small ... breweries making, perhaps experimenting with different styles of beer and making a smaller batch, and then when it goes well making it commercially. Sort of experimenting to see what they can do and offering more experiences for their customers. That is better than the mass producers.” (C11)

Artistic expression, skills and continuous experimentation and innovation in production processes were considered to be the source of novelty and differentiation in regards to the range of beer styles that were offered by ‘craft’ breweries. Those elements were considered as the differentiating points of craft beer in comparison to industrial, mass-produced beer, but most importantly, they were perceived as part of a pattern that guides everything in the craft brewery’s presence and purpose. Experimentation and novelty were seen simultaneously as continuous processes detrimental to a brewery’s craftiness and as the brewery’s *raison d’être*. As C11 above states, experimentation is a process that “*when it goes well*”, then its products are exploited commercially; yet, this clearly shows that consumers recognise that experimentation does not always lead to good results, and entails risks for the brewer. Consumers’ interpretation of the term ‘craft’ here is that, despite its success or failure, continuous innovation must be a key element of any brewery claiming to be craft.

This continuous effort, in conjunction with artistic expression and expertise, is perhaps why consumers perceive craft in brewing contexts to be synonymous with notions of variety and flavour. Our interviewees highlighted that craft breweries produce a variety of different styles of beer, different flavours, different levels of strength in the end product:

“I would tend to choose a craft beer taste over a sort of old traditional brand because there is a bigger variety of flavours there and they pioneer the interesting brews. Hijack by bigger breweries same with distilleries for me craft means small, unique, more flavour, its small batches, quality.” (C1)

“Ahm... anything that is probably new or ahm... what micro-breweries are making. It is important to me. I would prefer it over mass produced beer, because of the nice taste, bigger variety of hops and bitterness and percentage.” (C10)

What is worth observing here is the obsession of consumers with the ability of the brewery to continuously produce a wide range of new beers. Such ability is perceived as the means to offer consumers unique taste experiences. To consumers’ eyes this uniqueness is, again, linked with size: uniqueness can be achieved via small batches of carefully and artistically crafted products, that can only be experienced by ‘few’.

Overall, continuous attention to quality, innovation and creativity along with ability to produce a range of styles and flavours of beer products are fundamental attributes of ‘craft’ breweries and brewing processes, yet, surprisingly, these have not been addressed or accounted for, in any industry attempts when defining craft beer.

Peripheral associations to craft beer: price premium, acceptable forms of packaging and distribution, and locality

We now turn to more peripheral, less prominent connotations that consumers in our study related to craft beer. These associations move beyond the actual production processes and final core products, and touch upon other aspects of the marketing mix deployed to establish the role of craft beers in the contemporary marketplace.

As mentioned earlier, consumers associate craft beer with uniqueness and variety. These characteristics have implications for the price range in which craft beer is marketed:

“We had a discussion recently... and I think the real ale is always from a hand pub and craft from a pressure pump, from cans and bottles, and costs a bit more. I certainly choose a craft beer over that of a large brewery.” (C12)

C12 further considered that this price premium is a positive association for craft beer products: craft beer is considered to be worthy of a price premium because it provides the customer with extra value. Allegedly, with the brewer's higher attention to quality and instilment of creativity and effort, craft beer is a product of better quality, hence a moderate price premium in comparison to industrial beers is interpreted as good value for money. This matter can also be interpreted through an authenticity lens: consumers might consider that truly authentic craft beers are more expensive than industrial due to the artistic expression of the producer, their hands-on approach, and the meticulous processes of production followed in comparison to the mechanised forms of production employed by industrial beer producers.

Similarly, the associations of 'uniqueness', 'quality', and 'premiumness' attached to craft beer appear to have implications for the acceptable forms of packaging and distribution:

"It [craft beer] is generally used to mean keg but to me it should not mean keg, it should be about the way it is produced, but it is never going to be defined like that." (C5)

Equally, selection of appropriate distribution outlets appears to also add to consumers' perceptions of a beer product as 'craft'. In line with its unique and artistic nature, consumers seem to consider that beer distributed or sold in mass-retail environments is not craft:

"Personally, it was a term I imagine by small producers, as a way to differentiate themselves from the large mass producers, but unfortunately the mass producers are taking it now and its changing...now there is a craft section in the supermarkets, so it is dead to me personally." (C2)

Price premiumness, packaging in kegs and small bottles as well as distribution in outlets such as brewery shops and specialised stores, are thus symbolic representations of authentic 'craftiness' in brewing contexts.

Finally, perhaps the most surprising finding of this study was the (lack of) role of locality and origin of the beer products. Only one of our consumers contemplated, in a quite uncertain mode, that for him a beer can be considered 'craft' if it is locally-made:

“I would say it’s a local, I don’t really know to be honest, made by a smaller brewer.” (C9)

None of the other interviewees mentioned or even implied that local origin matters when considering whether a beer is ‘craft’. This is surprising because brewers often credit the expansion of the craft beer movement in general, and the success of their individual breweries and products in particular, to their linkage with their local communities (Mintel, 2013). In fact, highlighting local origin is a widespread strategy for breweries across the UK. Clear signals of origin, including place of production or of sourcing of ingredients (mainly water), as well as symbols associated with certain locales are actively embedded in marketing communication strategies and packaging. Hence, breweries evidently consider their locality as a key part of their ‘craft’ identity, yet consumers do not seem to share this view.

Conclusions, Implications, and Areas for Future Research

The starting point of this study was the diversities observed in research, among industry representatives, and consumers with regards to the meaning of the term ‘craft’. Existing discussions in the literature are heavily supply-side oriented, and the phenomenon has not been closely examined from the consumers’ perspective. This study therefore sought to explore consumers’ interpretations of the term ‘craft’ in relation to beer products and experiences via adopting authenticity as its theoretical lens. In particular, the current research aimed to provide further understanding of how ‘authentic’ craft beer experiences are represented in consumers’ minds.

Our analysis revealed a range of meaning categories associated with the term craft, and provided insight into their relative importance in consumers’ minds. Consumers predominantly associate authentic craft beer contexts with small size and independent ownership of the producing brewery, attention to quality, artistic expression and expertise

instilled into the production process, as well as continuous innovation. Other, more peripheral elements, such as price premiumness, packaging and distribution formats, as well as connection to locale and origin appear to be less straightforward. These peripheral elements can potentially reinforce the authenticity of a craft beer product or experience but are not necessary conditions. In other words, it is possible that different consumers may not ‘settle’ for a beer being labelled as ‘craft’ unless, besides the core elements, it is also produced locally, it comes in a certain container, it is sold at certain places, and to a higher price in comparison to mass produced beer.

In terms of practical contribution, by providing insight to practitioners, industry associations and policy/support bodies with regards to consumers’ interpretations of the term ‘craft’, and what they perceive to be authentic craft experiences in relation to brewing products, the study adds understanding of the ‘demand’ side to efforts to define ‘craft’ in those contexts. This is important because representation of all stakeholders’ perspectives in this critical phase of development for the craft beer industry is crucial in order to safeguard quality standards and ultimately ensure its sustainability.

At the moment, amidst continuous debates on what this highly-contested term represents, efforts by industry bodies such as SIBA to define craft beer cannot be assumed to reliably capture the meanings associated with craft beer, unless all stakeholders’ views, including those of consumers, are represented. Understanding what consumers perceive as authentic craft beer products and experiences may be the key to designing an official seal of ‘craft’ in this context that allows for the most important stakeholder, the consumers, to voice their views. At the same time, industry representatives can ensure that this new seal would be one that consumers do not associate with a marketing ploy, which is challenging as this kind of approach would actually be a marketing approach (Holt, 2002).

Nonetheless, the findings have provided clear indications of the core elements that a new or relaunched ‘seal’ of craft in brewing contexts should entail. What is real, true, and genuine is not the actual product itself: it became very clear throughout our analysis that craft beer products are something that global breweries can imitate. However, what they cannot imitate are the brewers’ entrepreneurial passion, artistic expression and personal touch that they extend to the production process and the final product, from start to finish, that is, from creatively designing the product and uniquely and timely combining ingredients to attaching labels by hand and making personal deliveries. This is reflected in Campbell’s (2005) work; he argues that craft producers invest their personality or self into the object produced and that the ownership of the craft product is with the producer.

There are therefore some key practical implications emerging from our findings. First, it seems that craft breweries centre their marketing efforts around their products, yet this approach cannot provide any kind of competitive advantage when a similar product can be made by companies owned or supported by large breweries. Instead, craft brewers might differentiate their products through the idea that they are made not by mechanised equipment, but by people that are personally vested into the brewing process via participating in its every stage and via assuming the risks of experimentation. An official seal of ‘craft’ should therefore account for the ways in which consumers in our study regarded craft beers: as something brewed with love, with unique flavour varieties, and made in small, experimental batches by a skilled and creative artist. As a result, such a seal should incorporate ideals of entrepreneurship, enthusiasm, passion, and the personalised spirit of products.

Second, the craft brewing industry should adopt a more macro-marketing perspective on its pursuit for authenticity. Kadirov et al. (2014) encourage businesses to be authentic through the promotion of common good, community welfare and mutually beneficial outcomes. In a similar vein, the craft brewing industry could use such an approach as a

platform to clearly position itself societally. In particular, the industry could more actively focus on its substantially different culture of drinking (Cohen, 1988), by aligning craft beer consumption with a ‘consuming less, consuming better’ standpoint, a positioning strategy that clearly differentiates it from binge-drinking. Consumers perceive the brewer as the artist that experiments and introduces them to new flavours and experiences; craft beer could be positioned as a culture of experimentation with new tastes that are socially enjoyed and consumed. Via connecting itself with overall lifestyle consumption habits, the craft brewing sector could gain a competitive advantage over larger actors in the beer industry.

Our study has revealed a number of areas where further research is needed, given that the craft brewing industry is in constant flux and at a very dynamic phase of its lifecycle. First, we have made a distinction between core and more peripheral meaning associations that consumers attach to the term ‘craft’ in brewing settings; further research is needed about the conditions where some of those peripheral meanings assume more prominence (e.g. they might emerge as more important for different types of consumers). Second, the role of locality needs to be explored further. Localism and origin may be more important in selecting among different craft beer brands, than in perceiving a certain beer as craft. It is also crucial to examine the marketplace from various viewpoints. A larger-scale study that systematically compares consumers’ and brewers’ perspectives of the term ‘craft’ would allow for a clearer identification of the core attributes of authentic craft beer products and experiences, hence enhancing opportunities for reaching a broader consensus. Finally, we note that craft beer production and consumption touch upon numerous topics such as entrepreneurial business practices and broader alcohol consumption. There are many opportunities for exploring the extent to which previous research findings in other sectors extend to this context as well.

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Appendix

Figure 1: Stages of thematic analysis [adapted from Fereday and Muir-Cochrane (2006)]

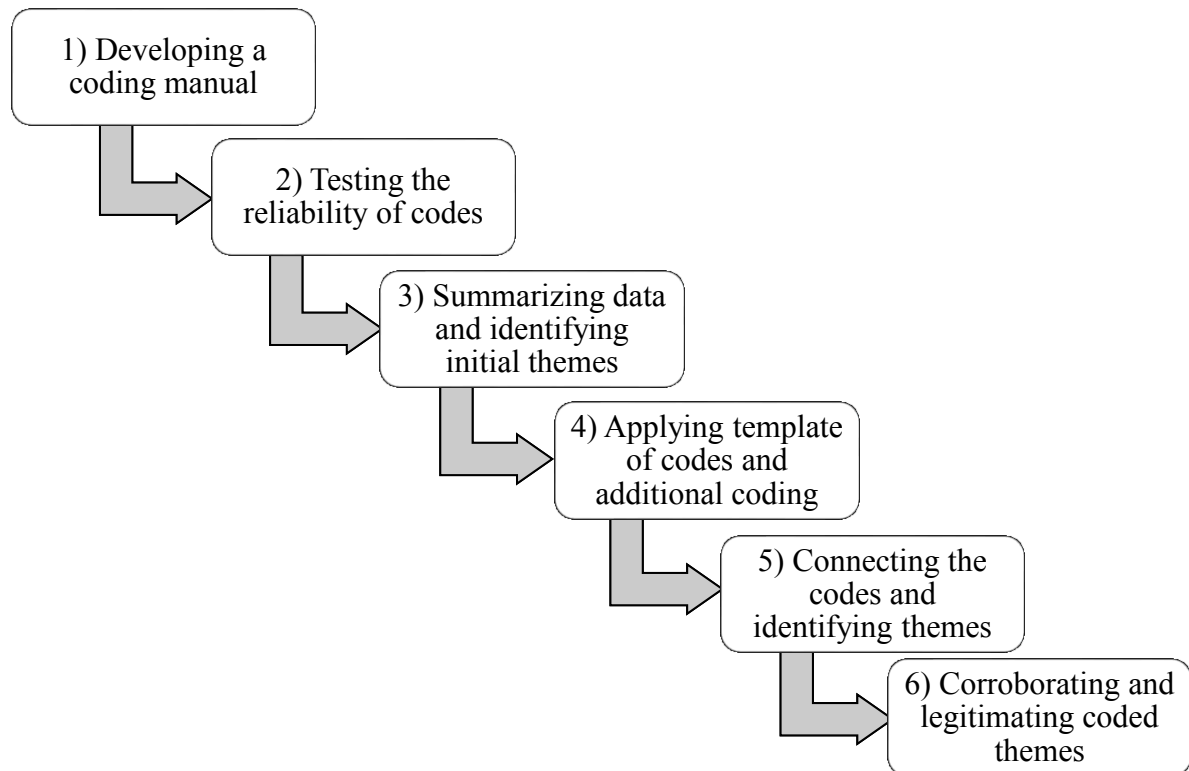


Figure 2: Overview of meaning categories

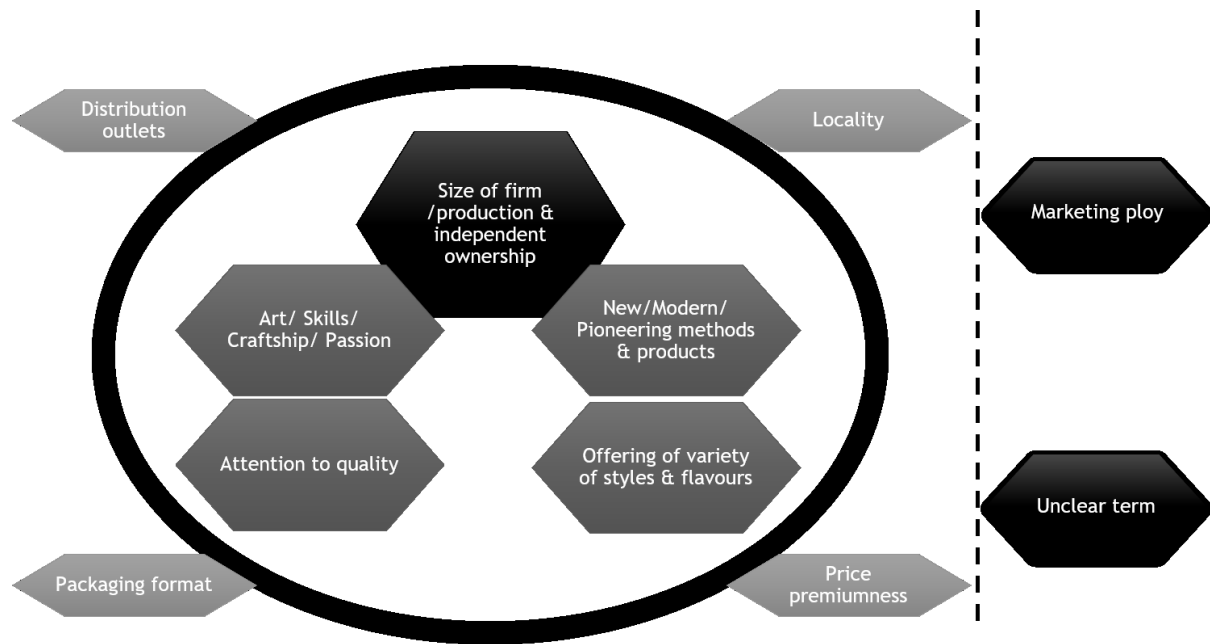


Table 1: Respondents' profile

Interviewee code	Gender	Age	Self-claimed frequency of drinking beer	Place of interview
C1	Female	30	Casual drinker	Brewery tour
C2	Male	30	Regular beer drinker	Brewery tour
C3	Female	28	More a wine drinker but interested to learn more about beer	Brewery tour
C4	Female	22	Does not drink beer often	Brewery tour
C5	Female	40s	Works for CAMRA (Campaign for Real Ale)	Brewery tour
C6	Male	60s	Beer enthusiast, works for CAMRA	Brewery tour
C7	Male	60s	Beer blogger, rather knowledgeable	Brewery tour
C8	Male	21	Casual beer drinker	At home
C9	Male	22	Regular beer drinker	At home
C10	Male	22	Occasional beer drinker	University
C11	Male	42	Casual beer drinker	At home
C12	Male	45	Casual beer drinker	At home
C13	Male	59	Casual beer drinker	At home
C14	Male	23	Drinks often, works in the tap room	Student union
C15	Female	21	Works in a pub required to try ales for the job	Student union
C16	Female	29	Works in a pub and every Friday and Saturday gets a range of beers to try	Pub in York

Table 2: Coding Manual

Code 1	
Label	Positive: Quality
Definition	Referring to the quality of the product/process/ingredients
Description	The label term could be specifically named in an overall description of the meaning of craft (by a consumer) and refer to the actual product, the process or the ingredients used.
Code 2	
Label	Positive: Size of the brewery/production
Definition	Referring to the size of the company producing the beer
Description	The label meaning can refer to the size of the brewery, the batches the breweries produce, small overall company and small independent brewery.
Code 3	
Label	Positive: Flavours
Definition	Referring to variety of flavours, unique flavours
Description	The label meaning includes nice taste, bigger variety, more flavours, etc.
Code 4	
Label	Positive: Art/skill
Definition	Referring to specific skill, creating something, unique brewing style
Description	The label meaning includes the emphasis of it being a unique product, and how each brewery varies in their production processes and end products.
Code 5	
Label	Positive: Packaging
Definition	Referring to keg
Description	The label meaning includes the emphasis that craft beer comes in kegs or certain sized bottles (generally smaller ones).
Code 6	
Label	Positive: New modern brands
Definition	Referring to non-tradition brand, pioneering
Description	The label meaning includes craft beer is more modern, up and coming, not old or traditional.
Code 7	
Label	Negative: Distribution channels
Definition	Referring to what is being distributed in supermarkets not being craft
Description	The label meaning includes craft beer should not be in big supermarket chains or pub chains but instead it should be in craft pubs, local farmers' shops, etc.
Code 8	
Label	Negative: Marketing ploy
Definition	Referring to it is a misused/hijacked term by multinationals, as a marketing ploy
Description	The label meaning includes craft is now a buzz word, the mass producers are taking over small breweries, it seems to be a way to sell more poorly produced beer.
Code 9	
Label	Negative: Consumers as victims
Definition	Referring to consumers increasingly being wearier of falling victim to the term

	craft being misused by large organisations.
Description	The label meaning includes the specific fear consumers have of buying something they assume to be a craft product but it turns out to be just a small brewery which was bought by a large brewery or a large brewery calling their beer 'craft beer'.
Code 10	
Label	Positive: Stage 4 NEW : It is local
Definition	Referring to the location where the brewery is situated
Description	The label meaning includes anything participants describe as local, but does not specify how far the distance need to be for a brewery to be still called local to that person.
Code 11	
Label	Negative: Stage 4 NEW : Price
Definition	Referring to a comparison between craft and non-craft beer and the implication that craft beer costs a bit more.
Description	The label includes any words describing or implying a higher cost for this product in comparison to non-craft beers.
Code 12	
Label	Neutral: Stage 4 NEW : 'I don't know'
Definition	Referring to comments where participants claimed no knowledge of craft beer or a specific probing question.
Description	The label covers participants who might be claiming to lack knowledge in parts of the interview or if the topic was overall an area they did not feel knowledgeable about.
Code 13	
Label	Positive: Stage 4 NEW : It is new/innovative
Definition	Referring to the association with craft and newness and/or innovation.
Description	The label is specifically focused on the terms of new and/or innovation linked to craft beer.