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Consumer interest in specialty beers in three European markets

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ABSTRACT

This study explores the quality perception of specialty beers (SBs) in Italy, Spain and Poland. Five-hundred and fifty mainstream beer consumers were enrolled in this study (two-hundred and thirty Italians, one hundred and sixty Poles and Spaniards respectively). The authors adopted a conjoint rating experiment in which the respondents were given forty SB profiles to evaluate. Each profile was described on six attributes (malt type, adjuncts, alternative source of sugars, characterizing ingredients, sensory characteristics, and retail price) varied at different levels and were asked to state his/her preference for each profile on a 9-point scale of interest. The results of this study showed that the ideal SB: (1) for the aggregate Polish panel is brewed from malted wheat, raw wheat, honey, and tropical fruits, is alcoholic and is priced below 2.00 Euros; (2) for the aggregate Italian panel consists of a beer brewed from malted wheat, maize, honey, and vanilla, is blonde and costs a maximum of 2.00 Euros; (3) for the aggregate Spanish panel is brewed from malted wheat, rye or maize, vanilla, is fruity and is priced below 2.00 Euros. The heterogeneity of interest in specialty beers observed in the three countries under test requires for the adaptation of a SB specifically to each culture in which it is sold. In this process of customization, brewers must take into account that gender modulates the effect of culture on consumer interest in SB sensory characteristics and ingredient formulation.

1. Introduction

Europe is the number two producer of beer worldwide. It produces 403 million hl of beer annually for a consumption of approximately 343 million hl and a turnover of 106 billion Euros including VAT (The Brewers of Europe, 2012). The key figures for 2013 show that the EU counts over 5000 breweries showing the interest that many Europeans have for the diversity and variety of Europe's many different beer cultures (The Brewers of Europe, 2014).

Supported by increasing consumers' demand, specialty beers (SBs)[2] have been experiencing an astonishing boom in the last two decades and continue expansion despite that economic downturn has affected consumers' spending. Even in European markets where beer sales are shrinking, value sales growth is primarily due to the success of premium and SBs at the expense of standard products (The Brewers of Europe, 2014).

SBs seem to satisfy the thirst for variety of the European market more successfully than mass-marketed standard industrial brands since they are better positioned to build a unique and intimate consumer culture (Aquilani, Laureti, Poponi, & Secondi, 2015; Berkhout, Bertling, Bleeker, de Wit, Kruis, Stokkel, & Theuws, 2013; Kleban & Nickerson, 2012). As of today, Europeans drink less beer but indulge themselves more with special and pricier beers since they are getting more affluent, more adventurous and thus more willing to experience new flavors and texture than ever. Under this scenario, the advantage of SBs is based on innovation, creativity, typicality, and authenticity, due to the variety of alternative raw materials in the bill of ingredient and the experimentation of innovative combinations of ingredients and flavors in the final glass. Moreover, SB competitive advantage depends on the rediscovery of ancient beer styles no longer of big brewing company interest and on the linkage between the product and the specificity of the territory (Schnell & Reese, 2003). This typifies SBs as an experience delivering drink that offers pleasure, enjoyment, sense of identity, social recognition and sets them apart from the similarity of mass-produced highly standardized pale lagers of commercial breweries dominating the market (Gómez-Corona, Escalona-Buendía, García, Chollet, & Valentin, 2016; Kraftchick, Byrd, Canziani, & Gladwell, 2014).

Despite the success of SBs brewed by craft breweries in the actual beer market, SBs have been a largely unexploited opportunity for industrial breweries. Big brewing companies are taking notice of this new trend and are trying to reposition themselves with an increased focus and investment on the SB sector. Brewers are looking at SBs as an option to help combat flat sales across Europe and improve profit margins, to

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[1] Formerly with this Institution.
[2] For a definition of SBs please visit http://www.bjcp.org/2008styles/style23.php. The authors use the term 'specialty beer' in its broadest sense that includes both industrially-made and craft-made SBs.

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hold on older drinkers longer, to lure more female consumers, to attract younger consumers by focusing more on beers with specific flavors and to get consumers who would choose other types of alcoholic beverages. Consequently, several commercial breweries have sought to tap into SBs by buying up craft breweries or by brewing pseudo-craft beers as part of a diversification strategy aiming at stabilizing their business and defying recessionary trends.

In this process, brewers may benefit from current findings of market analysis insights reporting that craft SBs have gained market share mainly from industrial mass marketed lager drinkers (Euromonitor, 2010) but also highlighting that SB success has been confined primarily to a minority of highly involved consumers for whom the relatively limited distributions of SBs and the effects of reference price are not a big concern (Giacalone, 2013). In a SB market that has experienced a strong growth for two decades, economic commenters believe further growth to be possible only if brewers are able to attract the majority of industrial consumers who may be interested in SBs but has yet to explore the SB beer world. For them, a balance between innovation and adherence to expectations could be the key to increasing acceptance since consumers have a general aversion to foods or beverages that are too novel or discontinuous compared to what they are expecting and may or may not be willing to embrace the use of new products for these reasons (Costa & Jongen, 2006; Giacalone, 2013; Van Trijp & Van Kleef, 2008). Therefore, the identification of specific product quality attributes for which the consumers or one or more segments in a target population reveal a particular sensitivity and interest is paramount to translate consumer needs, wants and expectations into manufacturing designed to produce the best possible cost-competitive product in a relatively short period. Consumers are central to this process and including the voice of consumers in the early stages of new product development, as a reference before final design decisions are taken, is extremely valuable since this approach aids ensuring design directions that are on target (Grunert et al., 2008; Jaeger & MacFie, 2010; Sparke & Menrad, 2011). Unfortunately, product innovation in the SB sector of the beer market has mostly relied on individual brewmaster vision about taste and identity than on strategic approach, the more so the more artisanal the production of a SB is.

Not surprisingly, billions of dollars are spent annually by the food industry on failed product launches (Costa & Jongen, 2010; Stewart-Knox & Mitchell, 2003). Multiple factors contribute to this failure rate. They include technical limitations, poor marketing and/or pricing strategies, too much or too little novelty that frightens or bothers consumers, the role expectations play in improving or degrading the perception of a product even before it is tasted; and to a lesser extent the inability of consumer sensory and hedonic information to predict reliably consumer decisions (Deliza & MacFie, 1996; Köster & Mojet, 2007a, 2007b; MacFie, 2007; Rosas-Nexticapa, Angulo, & O'Mahony, 2005; Van Trijp & Van Kleef, 2008).

Many methods and techniques are available to facilitate the design of consumers' relevant new products (van Kleef, van Trijp, & Luning, 2005; Moskowitz, Porretta, & Silcher, 2005). Within those highly actionable for technical product development, conjoint analysis (CA) is a valuable practical statistical-based market technique to answer cognitive problems in product research for its ability to enable product developers to understand how consumers' demands translate into the physical domain of product characteristics (Green & Srinivasan, 1978). The method is versatile and has been applied successfully in several areas (nondurable products, industrial goods, financial services, and transportation to name a few) for tackling optimal design of new product, reshaping of existing products, targeting market selection, and pricing a new product (Rao, 2009).

In CA-based simulated market experiment, consumers are presented with a number of hypothetical products created from a combination of levels from the constituent attributes. Consumers are asked to rank or rate each product on a scale of importance and each product is similar enough that consumers will see them as close substitutes but dissimilar enough to express a preference. Contrary to traditional surveying methods, CA calls for a choice between alternatives rather than engaging consumers in an intellectualized process of artificially ranking product features one at a time. Therefore, CA enables the researcher to uncover the trade-offs made by consumers in real world decision-making and reduces the general trend of earlier approach to generate an exaggerated impression of the importance of product attributes (American Marketing Association, 1992).

Through the analysis of individual consumer data, CA measures the importance individual consumers attribute to various product characteristics and estimates the utility of the various levels these attributes can assume. This empowers the researchers to uncover consumer patterns of response to product features and to estimate the impact of each level of the constituent attributes in generating interest in a given product. In this way, the researchers learn what is important in consumers' view, whether there are organizing principles regarding consumers' perceptions and how to create better concept through optimal combinations of attributes.

In the current European market, big brewing companies operate simultaneously in a number of countries with different cultural backgrounds and preferences for foods and beverages despite Europeans are bigger travelers than ever, experience proliferation in communication technologies, increased exchanges of ideas and beliefs, increased openness of markets and an increased familiarity towards products and cuisine of other countries (Risvik et al., 2006; Verbeke & Poquiviqui Lopez, 2005) which helped connect citizens together and homogenize wants and preferences. People construct their perceptions, beliefs, and attitudes about foods on the basis of cultural values (Almli, Verbeke, Vanhonacker, Naes, & Hersleth, 2011; Nestle et al., 1998; Pieniak, Verbeke, Vanhonacker, Guerrero, & Herlseth, 2009; Risvik et al., 2006), and cross-cultural comparison of the perception of specific products in different markets is paramount for marketers and product developers to release SBs that fit consumers demands in terms of availability, accessibility, retail price attribution, ingredient formulation, sensory appeal and perceived level of novelty these beers convey due to unconventional ingredients or to unexpected flavors.

Italy, Spain and Poland are good examples of the cultural differences existing among brewing countries in Europe and serve pretty well as case study. These markets are within the most influential on the EU beer production and differ widely one another in structure, patterns of consumer preference, drinking habits and dynamics (Assobirra, 2013; Bernatek et al., 2014; Marañón, 2013; The Brewers of Europe, 2012).

Italy and Spain can be typified as South European countries with many of the features of Mediterranean societies in their attitude towards food and eating. Qualitative and quantitative differences however exist in the way in which Italians and Spaniards consume beer. Italians are small beer consumers with an annual per capita consumption of beer far below the European average but they are extremely keen on SBs, being Italy within the top three brewing country for number of microbreweries in the world (Assobirra, 2014). Spaniards in turn are above average beer consumers in the European landscape, are particularly keen on non-alcoholic beers and respond to the ongoing decline in disposable income by shifting away from the on-trade, in favor of the off-trade and private labels. (The Brewers of Europe, 2014; Marañón, 2013; Euromonitor, 2015). Poles are heavy beer drinkers. They appreciated wheat beers more than Italians and Spaniards do, are moving away from strong beers towards flavored, regional and craft beers, and are characterized by an aspirational middle class with an increasingly disposable income calling for authenticity, naturalness, greater sophistication and heterogeneity in beer offer as compared to mass produced lager beers (Bernatek et al., 2014; Republic of Poland, Ministry of Treasury, 2014).

This investigation aims to provide brewers with information on the interest of culturally diverse consumers towards various beer features. It contributes to the understanding of consumers' quality perception of beer and more specifically of specialty beer in three European