

Stakeholders' and 'craft beer tourism' development

Abstract

The growth of craft brewing in many countries is increasingly documented in the academic literature. However, research on this phenomenon, concerning the tourism side, is still limited. This exploratory study contributes to the developing body of craft brewing research, investigating the potential, opportunities and challenges of craft beer tourism (CBT) from the perspective of a group of predominantly micro-brewers operating in three nations. The significance of these entrepreneurs as stakeholders of this burgeoning industry justifies the use of stakeholder theory (ST) as the study's theoretical foundation; this adoption represents a further contribution of the study. The usefulness of ST is confirmed, with the findings particularly aligning with the descriptive, instrumental, and normative theses. Additionally, different perceptions of the potential of CBT based on country are identified; content analysis provides further support when different forms of CBT that could be developed are identified. The study also underlines various important practical and theoretical implications, and suggests future research opportunities.

Keywords: Craft brewing, craft beer tourism, opportunities, challenges, stakeholders, stakeholder theory.

Introduction

Business diversification has allowed many entrepreneurs, including those involved in commercial production of food, wine, or beer, to add value to the production or gain competitive advantage (Di Domenico & Miller, 2012). For many businesses, tourism represents one among different diversification strategies (Phelan & Sharpley 2012). For example, through the involvement in tourism wineries can generate direct sales, educate visitors, help develop wine tourism or wine trails, and overall, contribute to the enhancement of regional destinations' image and branding (Ashton, 2014).

This study investigates the potential for diversification of an emerging industry, craft brewing, into craft beer tourism (CBT). In referring to CBT, the study considers an existing definition of 'beer tourism', namely, visiting breweries, beer shows, and beer festivals, whereby key motivational factors are experiencing elements of the beer region, and tasting the product (Plummer, Telfer, Hashimoto, & Summers, 2005). Academic studies highlight the significant growth of the craft brewing industry in different parts of the world (Elzinga, 2011; Fastigi, Esposti, Orazi, & Viganò, 2015; Maier, 2013). While academic studies addressing this industry from an entrepreneurial perspective already exist (Danson, Galloway, Cabral, & Beatty, 2015; Ellis & Bosworth, 2015), research is still marginal (Maye, 2012; Watne & Hakala, 2011).

Indeed, only few studies discuss the potential for craft breweries to diversify into CBT (Duarte Alonso, 2011). Limited research is also noticed regarding the needs of craft brewery consumers. For instance, elements craft brewing businesses should pay attention to during the planning process of a craft brewing facility, including the availability of an onsite restaurant or tasting room, have been under researched (Murray & Kline, 2014).

Further, as part of an industry with tourism appeal and potential, "breweries are understudied and are a ripe area for investigation" (Murray & Kline, 2014, p. 4). In addition, research predominantly focuses on craft breweries operating in the United States, with only few studies (Danson et al., 2015; Ellis & Bosworth, 2015; Maye, 2012; Watne & Hakala, 2011) exploring this industry elsewhere in the world. Finally, to date studies have not examined craft brewery operators across different countries.

By gathering the perceptions of mainly micro craft brewer entrepreneurs operating in Italy, Spain, and the United Kingdom (UK), this exploratory study contributes to the CBT literature. The following research questions (RQs) are addressed:

RQ1: To what extent could CBT be developed?

RQ2: What opportunities exist to develop CBT in participants' country/region?

RQ3: What forms of CBT could be developed?

RQ4: What could be some of the challenges in developing CBT?

The study makes three fundamental contributions. First, by addressing the above research questions, the study facilitates understanding among practitioners and academics about opportunities, barriers, and ways in which tourism could be incorporated by members of an emerging industry. In turn, these new and added insights could contribute to a more informed industry, with direct implications for the further CBT development in the showcased countries. Second, by choosing craft breweries from three different countries, the study provides an international perspective, which could allow for comparisons, as well as potential differences in approaches based on country.

Third, given the participation of a key group of stakeholders, represented by owners, managers, craft brewers, and other individuals directly involved in the craft brewing business, the study adopts the stakeholder theory of the firm (Donaldson & Preston, 1995; Freeman, 1984) as a theoretical framework in the context of CBT. Moreover, as the providers of the core product, and the facilities for the execution of CBT activities, the actions of these stakeholders could be instrumental in the development of CBT. While definitions of the word 'stakeholder' abound (Sheehan, Ritchie, & Hudson, 2007), this study adopts a definition suggested by Freeman (2004), namely, that stakeholders are groups or individuals that can affect or can be affected by the accomplishment of corporations' purpose.

Literature Review

Stakeholder theory (ST)

Various studies have contributed to the development of ST, including work by Freeman, Wicks, and Parmar (2004), where they associate the theory with values that are explicit and necessary in conducting business. Proponents of ST seek to describe, for instance, what managers do with regard to stakeholder relationships, what might happen if managers follow stakeholder managerial values, "and what managers should do vis-à-vis dealing with firm stakeholders" (Jones, 1995, p. 406). Fundamentally, the theory "asks managers to articulate the shared sense of the value they create, and what brings its core stakeholders together" (Freeman et al., 2004, p. 364). Value, that is, economic value, can be created by individuals who voluntarily cooperate and come together for the overall improvement of all those involved (Freeman et al., 2004). Thus, managers need to inspire stakeholders, develop relationships, and establish communities where there is a sentiment to strive for maximum effort "to deliver the value the firm promises" (Freeman et al., 2004, p. 364).

Earlier research (Freeman, 1984) identifies three fundamental problems related to businesses: Trade and value creation, the 'ethics of capitalism', and the managerial mindset (Parmar et al., 2010). ST underlines that, if relationships between businesses and individuals or groups "who can affect or be affected" (Parmar et al., 2010, p. 405) by a business are adopted "as a unit of analysis" (p. 405), then a better chance emerges to deal with the above problems more effectively.

The work of Donaldson and Preston (1995) is also very significant to this study. These authors propose several fundamental central theses that are presented in the context of the present research. Fundamentally, Donaldson and Preston (1995) underline that ST is: *Descriptive*, presenting a model which describes the corporation, including specific behaviors or corporate characteristics. Further, based on this thesis, the corporation is a constellation of

competitive and comparative interests that have intrinsic value (Donaldson & Preston, 1995). In this study, the 'organization' is assumed to be the craft brewing industry. As producers and marketers, craft brewing entrepreneurs represent one of the industry's most important stakeholders; thus, an assumption is made that both the industry and entrepreneurs share the interests possessing intrinsic value (Donaldson & Preston, 1995).

Instrumental, establishing a framework for investigating connections or links between achieving various corporate performance objectives, such as growth or profitability, and practicing stakeholder management (Donaldson & Preston, 1995). This last element is regarded as a combination of recommended structures, practices, or attitudes (Donaldson & Preston, 1995). In the present research, the instrumental thesis can be identified in that, in the process of growing the business or earning higher returns, craft brewing entrepreneurs need to adhere to product quality standard practices, as well as display or conform to certain entrepreneurial values or attitudes that go hand in hand with a business's goals and principles. *Normative*, which is the fundamental basis of ST (Donaldson & Preston, 1995), and helpful in interpreting the functions of corporations, such as identifying philosophical or moral guidelines for managing and operating corporations. The normative thesis involves the acceptance of two main ideas: a) As groups or individuals, stakeholders have legitimate interests that can be substantive or procedural elements of corporate activity, and b) "The interests of all stakeholders are of intrinsic value" (Donaldson & Preston, 1995, p. 67); thus, all groups of stakeholders merit consideration.

Regarding the present study, these two main ideas can be hypothesized in as many ways. First, the interests of craft brewers are essential for the present and future growth and development of the local craft brewing industry, particularly given the importance of these stakeholders for the growth, quality control, sustainability, and even the development of CBT. Second, the interests of these stakeholders, as well as those of consumers, in 'maintaining' the industry through consumption and purchases, and those of industry bodies (craft brewer associations), in regulating, supporting, and representing craft brewing entrepreneurs, also need to be taken into consideration.

Managerial: One of the demands of stakeholder management is the simultaneous attention to the different legitimate interests of stakeholders, in individual decision-making situations, or in establishing general policies and organizational structures (Donaldson & Preston, 1995). However, ST does not imply that managers are the rightful means of corporate governance and control, or "that all stakeholders should be equally involved in all processes and decisions" (Donaldson & Preston, 1995, p. 67). The hypothesized notion pertaining to this thesis relates to the involvement of craft brewer associations or government industry regulators. Such involvement could be illustrated in the planning and design of governance structures, and execution of policies that can have a substantial effect on the industry and consumers. Moreover, these expectations and requirements placed upon craft brewing entrepreneurs may lead to actual or perceived quality improvements, with implications in terms of consumers' experience, and overall image of the industry.

ST and tourism studies

The tourism literature has partly adopted ST or ST analysis (Currie, Seaton, & Wesley, 2009; Sautter & Leisen, 1999); however, there has been limited use in the areas of tourism strategy, policy, and planning (Getz & Timur, 2005). Research by Currie et al. (2009) adopts ST when the authors seek to determine a feasibility analysis for a natural resource attraction. Currie et al. (2009) recognise the usefulness of the theory in gaining various perspectives of 'stakeholder salience' in the pre-start phases of the development.

Byrd (2007) adopts ST in the field of sustainable tourism development, and identifies two emerging areas where ST has been applied in the tourism literature. Further, Byrd (2007)

explains that the first area “is closely related to the classical idea of stakeholder management” (p. 9). For instance, organizations consider stakeholders’ interests and develop practices and policies based upon stakeholders’ influence and power (Byrd, 2007). The second area of ST relates to the element of collaborative thinking, which the author attributes to the work of Jamal and Getz (1995), and Yuksel, Bramwell, and Yuksel (1999).

A thorough literature review reveals that ST has been used to a very limited extent in other forms of tourism, including wine tourism. Importantly, ST is yet to be used in other emerging sub-sets of tourism, such as CBT, while in event management and event membership there is potential for applying ST (Carlsen & Getz, 2006).

This exploratory study proposes to address existing gaps of knowledge from the perspective of predominantly microbrewery operators. The study examines the perceived extent of potential development, opportunities of such development, forms of operationalizing CBT, and challenges of CBT development through the lens of ST.

Methods

This study is part of a broader investigation, which examines contemporary issues in the burgeoning craft brewing industry in three countries. In the setting of this study, these issues include craft brewery entrepreneurs’ perceptions of the extent to which CBT could be developed, the potential to develop CBT in the participating countries, perceived ways in which this activity could be operationalized, and potential challenges in its further development. The authors’ background knowledge, as well as living and working experience in Italy, Spain, and United Kingdom (UK) were determinant in the choice of these three nations as the studies cases. Importantly, based on the authors’ research and review of both academic and industry literature, these three nations’ craft brewing industries are also experiencing growth. A recent report (Brewers of Europe, 2015) indicates that in 2014 the UK (1,414) had the largest number of microbreweries in Europe, followed by Germany (677), France (566), Italy (505), Switzerland (440) and Spain (314).

Different industry websites (siba.co.uk; www.mondobirra.org; www.cervezasnacionales.es), as well as other literature (Castillo Arana, 2014) were consulted in the process of building a database of microbreweries in the three nations. These efforts resulted in the identification of email addresses of over 926 businesses, 282 in Italy, 212 in Spain, and 432 in the UK. Subsequently, messages were sent to these businesses in the nation’s respective language. The message explained the objectives and purpose of the study, and also included an invitation for recipients to complete an online questionnaire, following a link located in the body of the message. While online questionnaires are known for achieving modest responses (Bardach et al., 2015), the online option was chosen in view of various limitations, such as lack of resources to travel and visit different craft brewers individually, make long-distance telephone calls, or email paper questionnaires by mail. However, researchers (Tang, Amran, & Goh 2014) also report modest response rates using questionnaires sent by post and email. Initially, 106 messages bounced back from all three nations (33, 41, and 32, respectively). Three reminder messages were sent between May and July of 2015. In total, 130 valid responses were obtained from the online questionnaire, a 15.9% response rate (130/820).

The questionnaire featured various sections. Specifically with regard to the objectives of this study, one section investigated demographic characteristics of participants and the breweries. A second section was divided into four sub-sections to reflect the research questions previously outlined. One sub-section provided a five-point Likert-type scale (1= strongly disagree, 5= strongly agree) for participants to rate the extent to which CBT could be developed (RQ1); this section also provided space for comments. A following open-ended question (RQ2) asked participants to type the opportunities that might exist to develop craft

brewing tourism. Similarly, two additional open-ended sub-sections entailed answering perceived forms of CBT (RQ3), and perceived challenges in CBT development (RQ4), respectively.

The research questions were based on a review of the pertinent literature. For instance, the aspects of opportunities and challenges align with earlier research conducted among micro-breweries in Alabama (Duarte Alonso, 2011), and with a more recent study focussing on UK microbreweries, which also identifies the potential to blend micro-brewing and tourism (Ellis & Bosworth, 2015). Additional sections of the online questionnaire examined other areas related to craft brewing entrepreneurship (innovation); however, these areas are beyond the scope of the study.

The online data collection process was supported by face-to-face and telephone interviews conducted with an additional 24 micro-brewers: eight in Spain (face-to-face, July of 2015), six in Italy (four face-to-face, two telephone interviews, July of 2015), and 10 in the UK (10 telephone interviews, August-September, 2015). When the proximity between these businesses and the authors' location was identified, these entrepreneurs were invited to a face-to-face interview, instead of completing online questionnaires. The average time of the interviews was 40 minutes. A final supporting component was provided when one of the authors attended a national craft brewing conference organised by different craft brewing groups in Barcelona (July, 2015). This complementary data collection strategy further assisted in identifying opportunities and threats for the industry, including in the context of CBT development. Thus, in all, 154 useful responses were obtained, an 18.2% (154/844) response rate.

The collected data were transcribed by the authors, two of whom are fluent in English, Italian, and Spanish. Because the bulk of the collected data was based on written answers and comments, qualitative content analysis (QCA) was used. QCA is a method for describing the meaning of qualitative material in a systematic way" (Schreier, 2012, p. 1), whereby patterns or themes can be identified and coded through systematic classification (Hsieh & Shannon, 2005). In the following sections, comments from both online and interview participants are provided interchangeably, and are labelled as follows: Participant 1, UK= P1UK, Participant 2, Italy= P2IT, and Participant 3, Spain= P3SP.

Demographic characteristics

Several differences are identified among the online questionnaire participants (Table 1). For instance, UK participants indicated producing more quantities than Italian and Spanish.

Table 1 Here

More expectedly, given the long tradition in beer production/consumption in the UK, these breweries also have traded for a longer period of time. Further, while UK breweries employ more individuals than do Italian and Spanish operations, the bulk of all three groups appears to employ between one and nine individuals, with only five (UK) breweries employing 10 or more people. However, the large majority of the participating firms (125, 96.2%) fits the 'micro' business category, or those businesses employing fewer than 10 people, with the remaining being small businesses, or those employing fewer than 50 people (European Commission, 2015a). This characteristic was also noticed in the 24 interviews conducted. Finally, a clear gender divide was noticed, with the overwhelming majority of participants being male. During the interviews, an even more unbalanced gender split was noticed, with only one female among 24 participants.

Based on the data gathered during the interviews, the large majority of craft brewing businesses were established by either one person only, or by a small group of two to three business partners. During the interviews, participants' passion for making a unique beer product emerged as a key motivation; in developing their own brands, these individuals

sought to distance themselves from the large, mass producing businesses' philosophy. Additional motivations included both the knowledge of craft beer production, for instance, as a previous hobby brewer, and the need to make an income or have a profession. However, the background of the brewery (family/individual enterprise), as well as motivations to establish the brewery are unknown in the case of the online participants. In addition, all the breweries interviewed were either located in a large city, or in a town. Hence, in the case of these businesses, craft brewing appears to be an urban/suburban phenomenon. Similarly, in gathering the 926 email addresses, it was noticed that most breweries' physical addresses were in cities or towns.

Results

Perceived extent to which CBT could be developed

An opening question in the online questionnaire asked participants to rate the level of agreement regarding the extent to which CBT could be developed in the corresponding region/country. To this end, a 5-point Likert-type scale was used, where 1= strongly disagree, and 5= strongly agree, with the resulting mean (4.17) clearly indicating general agreement. However, when comparing the results based on participants' country and level of agreement using Scheffé post hoc test, a statistically significant difference was noticed ($p < 0.001$). Moreover, the level of agreement among Spanish (mean=4.50), and Italian participants (mean= 4.14) was clearly higher than that of UK participants (mean= 3.78).

Participants' comments provided in this section of the questionnaire further illustrate the variety of perceptions, both positive and critical, regarding the potential development of CBT. One salient comment (P1IT) underlines key elements related to ST: *"It is possible to develop CBT, as long as you create networks of craft breweries in the region, which produce excellent products; it is possible to arrange tours, where visitors can visit all these breweries, and... can buy craft beers from all the breweries that are part of the network."* Moreover, P1IT alludes to the potential for 'economic value' postulated by Freeman et al. (2004), when people may engage in voluntary cooperation for the benefit of all stakeholders involved, or in the case of the participant's suggestion, craft breweries being part of a network. Earlier research exploring wine tourism development (Wargenau & Che, 2006) identifies the strength of networks as a key element conducive to the creation of a wine region, and consequently a tourism destination.

Running Scheffé post hoc again, the notion of perceived intrinsic value, an aspect discussed by Freeman et al. (2004) regarding ST, appears to be much stronger among the 'younger' breweries ($p < 0.001$). Moreover, participants whose breweries are three years old or less agreed significantly more (mean=4.45) than breweries between four and 20 years old (mean=3.98), and those older than 20 years (mean=3.25) that CBT could be developed. This finding also underlines the more innovative behavior, or more interest and involvement in different entrepreneurial strategies among these 'new' business owners and managers, who consider a variety of options to gain exposure and develop brand image. Together, the resulting overall means, and the inter-group differences clearly demonstrate the significance of this group of stakeholders, particularly in identifying opportunities and barriers in the development of CBT.

Perceived opportunities from CBT development

A second open-ended question asked to indicate in words the existing opportunities to develop CBT in participants' country/region. The resulting content analysis from the comments in the online questionnaire (Table 2) illustrates various differences in perceptions. Again, while 70% or above of Italian and Spanish participants have positive perceptions, this

percentage is much lower among UK participants, with over 40% being both negative and undecided regarding such opportunities.

Table 2 Here

Despite the above differences, running Pearson's Chi Square test between positive/negative perceptions and demographic characteristics of both participants and breweries yielded no statistically significant differences. In contrast, the interviews among UK craft breweries elicited more positive views, as opposed to those among Italian and Spanish craft breweries, where some participants were cautious regarding such opportunities (Table 2).

Verbatim comments highlight the positive views among participants from the three nations; P3UK, for instance, acknowledged: *"The rise of the 'brew pub' presents a massive opportunity for [craft] brewing tourism."* Similarly, P4UK recognises the state of CBT *"in its infancy"* stage, and at the same time the lack of outside financial backing. Lack of support from government was also highlighted by two other participants. Given this challenge, P4UK suggested that CBT would have to be developed by the individual craft brewery, *"and groups of businesses."* This comment resonates with a previous one (P1IT) regarding the usefulness of building networks and cooperative relationships.

Further, P3IT mentioned the growing interest among consumers, who are prepared to make time and financial investments: *"People call often or send us email to have information about our craft beers. They are also prepared to travel long distances to come and visit the production plant."* The gastronomic element was also considered vital for realizing the potential of CBT (P4IT): *"Bringing together good Italian food and craft beer in order to create a unique combination."*

Spanish participants' perceptions were by far the most positive (75%). P6SP's comment, for example, emphasizes current entrepreneurial initiatives and an accepting attitude by visitors: *"Numerous opportunities; the public is increasingly interested in this type of tourism, and in 2014 we counted a total of 1,000 visitors to our craft beer factory."* As did some Italian participants, P7SP also perceived gastronomy as an ideal complement to the CBT experience: *"The increase of craft beer operations in Barcelona is unstoppable. There are new investors, new spaces for leisure activities, and a growing interest in 'marrying' gastronomy and craft beer."*

Perceived forms of CBT development

When participants were asked to comment on the various forms of CBT that could be developed, various differences based on the brewery's country were identified (Table 3). While all three groups view craft beer trails/tours as the main form of CBT, UK participants clearly favor this variant more than members of other groups. In one of the few research studies on beer tourism to date, Plummer, Telfer, and Hashimoto (2006) provide a framework depicting both the positive and negative 'consequences' of participating in a Canadian Ale Trail. Awareness of craft brewing/brands, increased combined impact, and benefits to the local area are some of the positive consequences, while negative consequences include additional work, legal liability, and insufficient beer sales (Plummer et al., 2006).

In comparison, Italian and Spanish participants view the pairing of food and craft beer as a key form of CBT. Similarly, 'consuming' the territory where craft breweries are located, through local art, architecture, food or wine is clearly more relevant for Italian and Spanish participants. However, rather surprisingly given the long tradition of beer consumption and historic/heritage tourism in the country no UK participants mentioned these aspects. Tastings, including by opening the craft brewery to the public, are more popular among Italian and Spanish participants, as is visiting the factory where craft beers are made.

Table 3 Here

Several salient comments are selected from each country represented. First, P5UK emphasized various practical and significant aspects, such as the importance of collaborative relationships between the craft beer and other industries, or exploiting the uniqueness of the diverse nature of the craft beer product: *“For breweries with visitors, centers/educational facilities/bars/cafes... there is already in place an opportunity to do tours. I would envisage partnering with local 'craft/artisan' food produces and also local accommodation providers (staying away from the faceless chain offerings) and do coach tours around the UK. Each county has a particular style of artisan beer and food and accommodation that could be exploited by a beer tourism initiative.”*

Second, in line with P5UK's comment, P5IT identified a more holistic approach, extending CBT, from the craft beer product to also embrace various industries: *“Packages following a 'visit, taste, eat, and stay' principle could be quite attractive to start with. This principle would allow for developing territorial 'aggregation', which embraces farms, restaurants, and hotels.”* In the absence of a substantial body of CBT literature, that of wine tourism (Asero & Patti, 2011; Bruwer et al., 2013; Getz and Brown, 2006; du Rand and Heath, 2006) is used to draw comparisons with the findings. For example, Getz and Brown (2006) stress the importance of packaging when they refer to the extent to which wineries are oriented towards tourism, and to “key stakeholders involved in wine tourism development and networking” (p. 88). Similarly, regarding food tourism, du Rand and Heath (2006) outline theming packaging and routing as key marketing management tasks, which may contribute to enhancing the appeal of a destination, as well as contributing to its competitiveness and sustainability.

Third, comments from Spanish participants are also in agreement with previous notions of a more holistic approach, in that several initiatives or principles are combined to complement or enrich the CBT experience. P8SP, for instance, suggested: *“Craft beer tastings, craft beer making workshops, visits to micro-breweries. I do not believe in the development of a CBT exclusively, but instead, as a complement of local tourism.”* P9SP's comment is also relevant, perceiving the potential of *“Joint routes, where both wineries and micro-breweries could be visited, and extended by gastronomy and rural accommodation...”*

Perceived challenges in the development of CBT

A final section of the questionnaire investigated participants' perceived challenges to developing CBT (Table 4). While both Italian and Spanish craft brewers exhibit some similarities, overall, the three groups appear to perceive challenges differently. Already the most identified challenge varies across the three groups. First, whereas lack of infrastructure and time to be involved in CBT are two key findings among UK craft breweries, disorganization, marginal initiative and cohesion within the industry represent the main challenges for Italian participants, followed by the perceived absence of a local beer culture. Second, for Spanish craft brewers the main issues are the perceived weakness of a local craft beer culture/image, followed by perceived lack of institutional/industry support, and lack of infrastructure to become involved in CBT.

A selection of verbatim comments complements the data shown in Table 4. P6UK's comment provides support to perceptions of the existing modest level of infrastructure, with lack of organised craft beer trails, as well as information: *“People do travel to regions on beer breaks but rely on own investigations and itineraries.”* Other UK participants were less receptive to the idea of CBT. For instance, P6UK was concerned with the potential over-commercialization of CBT: *“An excessive amount of tourists drives away the local customers... and your local customers are the ones you have a relationship with.”* Further, P7UK explained that *“Long term, tourism / tourists are not the market that beer should be focussed on,”* and P7UK that *“I want to brew beer not sell it to final consumer; therefore, not my area of interest.”*

Among Italian participants, P6IT underlined the weaknesses within the industry in terms of lack of strong networks: *“Very few opportunities because there is little/no tendency to form networks among craft breweries.”* Plummer et al. (2005) identified the potential benefits that could be achieved by breweries incorporated in a trail adopting collaboration instead of competition, including by referrals that could motivate visitation to various breweries. A subsequent study (Plummer, Telfer and Hashimoto 2006) noticed that, whilst initially collaboration was an effective means to attain goals among participants to the beer trail, over time unclear/changed goals, incompatibility of intentions, and competition among members led to an end of effectiveness within the group. P7IT perceived barriers both at an industry, as well as at an institutional level: *“Very few [opportunities] ... it will always be something initiated by private craft breweries, but we will never have a national movement because we do not receive government support.”*

Table 4 Here

Within the Spanish participant group, there was a perception that the local ‘beer culture’ is still weak (P8SP): *“As compared to other Spanish regions, there is a lack of [craft beer] tradition. There is no [craft beer] culture; we have to develop it from zero, which, in the long run, might create an opportunity.”* Apart from lack of culture/tradition, the developing nature of this new industry was also perceived as a challenge (P9SP): *“The industry is little or not developed at all; it is very ‘young’ for specific tourism strategies to be developed yet.”*

Discussion

Overall, various associations between the study’s findings and ST are noticed. Figure 1 provides a conceptualization of the study’s findings, linking the participating group of stakeholders and ST. First, Freeman et al.’s (2004) point concerning economic value, which may result from voluntary cooperation among different individuals or stakeholders, appears to apply in the context of the study. Participants’ responses (P1IT) allude at the significance of this aspect. In contrast, the lack of networks and collaboration within the industry (Table 4) also provides a solid argument that potentially beneficial opportunities are forgone by failing to nurture those networks and collaborative relationships. The ‘problems’ businesses face, such as trade, value creation and ‘managerial’ mindset (Parmar et al., 2010) also seem to fit within the context of the findings. Moreover, the findings suggest potential benefits from developing CBT, and also the adaptation which needs to occur for craft brewers to make the transition from production to a more entrepreneurial approach, where promotional, marketing, and service skills complement the perceived quality of the craft beer product.

Figure 1 Here

Regarding the descriptive thesis (Donaldson & Preston, 1995), the statistical results and comments underline the intrinsic value that different interests of the participating stakeholders have, particularly in terms of CBT development. These values, which include the positive as well as negative perceptions concerning the opportunities of developing CBT, or perceived forms of CBT, may also align with the interests of the local craft beer industry. Together, these values demonstrate participants’ interests in developing initiatives related to CBT to enhance the industry’s overall sustainability. This argument may be more relevant in the cases of Italy and Spain, where the craft beer phenomenon has grown substantially in recent years, though this development is also obvious in the case of the UK (Brewers of Europe, 2015).

The instrumental thesis also fits within this research in two ways. With regard to participants’ suggested forms of CBT, overall, positive perceptions of practical CBT alternatives (tours, tastings, combining beer and gastronomy, packaged CBT) could have important and beneficial implications for the ‘corporation’, or craft brewing industry, particularly in nurturing the development of CBT. Participants’ identification of challenges to develop CBT (Table 4) also partly aligns with this thesis. Moreover, through this exercise

craft brewing operators indirectly recommend changes of attitude, operationalizing practices and strategies, for instance, in regards to lack of networking/collaboration, or the need for building a craft beer culture.

The normative thesis is likewise reflected in the findings. Indeed, based on Donaldson and Preston's (1995) premise, and as highlighted in the previous theses, the 'legitimacy' of craft brewers' interests is demonstrated in generating ideas, suggestions, and in identifying potential challenges in the development of CBT. Together, these elements can be conducive to 'corporate activity', and help sustain the craft brewing industry's long term economic sustainability. Furthermore, an argument is made that participants' interests in maximizing the potential of the craft breweries have intrinsic value, especially as this group of stakeholders is vital for the production of craft beer, and potentially for delivering the tourism experience. Therefore, in line with Donaldson and Preston (1995), this group of stakeholders merits significant consideration, namely, by government, industry bodies, and even by larger bodies such as the European Union, which seeks to develop entrepreneurship and sustainability among micro, small, and medium enterprises through a variety of strategies (European Commission, 2015b).

Finally, the managerial thesis is related to the findings in two ways. First, craft brewers' perceptions of CBT development, with the recognition of limited infrastructure, lack of support, or collaborative relationships. Demonstrating genuine concerns for other stakeholders of the industry, including visitors/consumers has potential implications for the image of the craft brewing industry. Second, these concerns are also mentioned in response to frustration stemming from perceived lack of support from government/industry bodies. Moreover, participants identifying those concerns and expressing criticism seem to expect more involvement from those stakeholders that, as government and industry bodies, could support the developmental process of craft brewing, including CBT development.

Field research conducted in Spain partly demonstrates increasing efforts by craft brewing bodies to develop the industry. For example, a craft brewers' conference held at one of Barcelona's brewery-pubs, which is open to the public and strategically located in one of Barcelona's popular tourist centers, underlines efforts by craft beer industry representative groups to disseminate knowledge and education among current and future consumers. This event also provided opportunities for the approximately 50 attendees representing craft breweries from different Spanish regions to discuss and share concerns, ideas, and future plans.

Conclusions

Reflecting the phenomenon of craft brewing and craft breweries in many countries, the academic literature on craft brewing entrepreneurship or CBT has grown in the last decade. However, as a relatively new field of research, and as recognised by various authors (Maye, 2012; Watne & Hakala, 2011) many knowledge gaps still exist. The present exploratory study sought to narrow existing knowledge gaps, and contribute to the CBT literature in various ways. First, the study provides new and added information regarding an under-researched field (Murray & Kline, 2014), by investigating areas related to CBT development. Second, the study provides the perspectives of craft brewery owners, managers, and directors operating in three different countries, and therefore provides a cross-country comparative component, which is rare or inexistent in the academic CBT literature to date. Third, as discussed in the previous section, the study examines participants' perceptions of CBT development through the lens of ST, adopting the theory as an instrument to gain and facilitate understanding.

The overall findings demonstrate agreement regarding the extent to which CBT could be developed. However, differences among the various participant groups exist, with Italian and Spanish participants, or the 'younger' group of craft brewing operators clearly indicating

more positive views. The majority of the participants has also positive perceptions about opportunities to further develop CBT, with craft beer trails/tours comprising the main CBT alternative. Differences based on country were noticed, with Italian and Spanish participants clearly more interested or aware than UK participants in craft beer and food pairings, tastings, or visits to the craft beer factory. Finally, lack of infrastructure, limited organization and cohesion among craft brewers, lack of institutional support, and the weak image of the region as a craft beer production area are some of the main perceived challenges.

Implications

From a practical perspective, the findings have important implications for the craft beer industry, as well as for other stakeholders, including government and other agencies considering this emerging industry as a potential pillar of economic development, including in European regions. One fundamental implication is that participants' perceived extent of CBT development, opportunities and challenges, or forms which to be trialled or developed could all find applicability in the craft beer industry. Moreover, both emerging patterns (Table 3), or even differences (Table 4) among groups from three different countries, while not generalizable or conclusive could nevertheless be used as a baseline or point of departure for the industry to reflect upon, particularly given the relatively modest research background on this burgeoning industry.

From a theoretical perspective, ST contributed to a more in-depth analysis of the study's findings, and more overall understanding of the themes under investigation. The discussion of the various links between the theses proposed by Donaldson and Preston (1995) and the study's findings, and the subsequent illustration (Figure 1) demonstrates the validity of ST as an analytical tool in studying an emerging industry, and the potential to combine its products, environment, and surroundings with tourism. ST also helped highlight or further reinforce the significance of craft brewers as a key group of stakeholders. Moreover, adopting ST helped magnify the image of this group, who, while seemingly vulnerable and limited in terms of resources and capacity, is essential in the development of the industry, and delivery of the CBT product. Therefore, further examining this group, as well as other key stakeholder groups involved in craft brewing, or in more established industries through the lens of ST could yield very important knowledge, including identifying the importance of stakeholders.

Limitations and Future Research

Various limitations are acknowledged in this study. First, despite complementing the data collection process with face-to-face and telephone interviews, which proved very useful for this first comparative study across countries, the overall number of participants is limited, and does not allow for making generalizations about the craft brewing industry or CBT. While online data collection can often produce low response rates (Bardach et al., 2015), given some of the challenges faced in this study, future cross-regional or cross-country research could follow a similar approach, complementing and enriching the data with short face-to-face interviews. Second, while the study had an international focus, more countries could have been targeted; future investigations could consider this alternative.

A further limitation is the absence of regional data that would allow for comparisons within each country. Consequently, this limitation suggests the potential to investigate breweries in different regions of the same country in future explorations. Such an approach may allow for identifying differences in perceptions about CBT development, which could in turn be of practical use to participants and the craft brewing industry. An additional future research thread could consider a broader representation of stakeholders, including consumers/visitors, and/or hospitality operators. Finally, the future consideration of ST in the context of craft brewing research- or research conducted in other emerging industries- could

also help generate a deeper understanding, as well as contribute to the further development of the theory.

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