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Creating new tourism opportunities from Italy's craft beer revolution: Exploring consumer motivations to visit craft beer roads

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Abstract

In recent years, the craft beer sector in Italy has experienced significant growth, prompting the emergence of craft beer tourism as a possible strategy for local and rural development. This study explores the consumer profile and motivations of visitors to craft beer roads, specifically the Pedemontana Veneta beer road in the Veneto region of Italy. The overall aim of this investigation is to understand how craft beer can support new regional tourism opportunities. Using a mixed methods approach, data was first collected through a questionnaire that assessed the socio-demographic characteristics, knowledge, preferences, and motivations of potential consumers. Additionally, craft beer industry reports were reviewed to supplement the challenges and opportunities portion of the research. The consumer questionnaire had a total of 151 respondents and was administered online from May 2 through June 30, 2024. Findings reveal that most respondents were motivated to visit a craft beer road by the opportunity of engaging in the craft beer experience. However, by applying Plog's tourist psychographic model, most potential consumers were identified as allocentric tourists who seek out undiscovered destinations in early development stages. These consumers have a strong interest in craft beer, even among those who do not typically consume it, indicating a broader appeal of craft beer tourism as a niche within gastronomic tourism. Results also showed that while consumer interest in craft beer is high, awareness of craft beer roads as a tourism option is limited. The results suggest that enhanced marketing strategies, more collaboration among stakeholders, and the incorporation of varied itineraries could strengthen the attractiveness of craft beer roads in Italy. This research contributes to the limited literature on craft beer tourism in Italy, offering valuable insights for destination managers and local communities to leverage craft beer as a means of promoting regional identity and economic development.

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"Not all chemicals are bad. Without chemicals such as hydrogen and oxygen, for example, there would be no way to make water, a vital ingredient in beer."

-Dave Barry

Chapter 1. Introduction

Gastronomic tourism is experiencing fast and steady growth and is considered a way for rural areas to promote local and regional products and services (Slocum, 2016; Dixit, 2019). One example that falls under gastronomic tourism is craft beer tourism which is the focus of this research. Recent developments in the tourism sector seek to combine craft beer with experiential tourism, potentially creating a winning combination that can benefit local economies. Products such as craft beer that are locally made are more than just commodities; they represent social and cultural heritage and can drive innovation and knowledge-sharing. Given that Italy does not have a long beer tradition as it does with distillates and wine, the emergence of the craft beer sector in Italy has been attributed to other factors beyond traditional consumption habits and production know-how. These factors are likely the diffusion of global consumption trends and the neolocalism movement that has emerged in recent years (Holtkamp et al., 2016, Gatrell et al., 2017). Craft beer production in Italy has drawn inspiration from local traditions and domestic ingredients, while also being shaped by the established craft beer cultures of countries like the United States and the United Kingdom.

The craft beer movement in Italy began in the 1990s and continues to thrive today. This shift towards craft beer production was heavily influenced by the craft beer revolution that started in California in the 1970s. A growing consumer interest in craft beer, the formation of producer groups, and Italian national laws have encouraged the growth of the sector. The production of craft beer in Italy has been officially regulated since 2016, when the government addressed the lack of clear regulations by defining the characteristics and production processes allowed (Law no. 154, July 28, 2016). According to this law, craft beer must be unfiltered and unpasteurized, produced by small breweries that are both legally and financially independent from other breweries, and have their own production facilities, with a maximum annual output of 200,000 hectoliters (Turco, 2016).

Today, Italian craft beer is characterized as being traditional and experimental at the same time, and encompassing a culture of sociality, conviviality, and quality. In Italy, production volume and consumption have increased since the start of the movement and just recently began to slow down. For example, from 2011 to 2015 the number of craft beer producers increased from 336 to

674 and the average production per brewery grew from 411 hectoliters to 622 hectoliters (Assobirra, 2016). Today, the average annual production for craft breweries is 1,100 hectoliters (UbObiart, 2023). One of the main factors for this growth is the change in consumer preferences. As with food and wine, many consumers are looking for local, high-quality and authentic beer that is distinctly different than commercial beer. This phenomenon has manifested in the growing presence of microbreweries and brewpubs. "Craft beer tourism" is the term used for the act of consumers seeking out a destination to sample craft beer. This can include visitations to breweries, festivals, or beer trails. While many craft beer establishments are in urban areas, a growing number are opening in rural areas (McLaughlin 2014; Sidali et al., 2018). The localization of these craft breweries is important due to the potential for added value given by the territory which is grounded in local communities. Many craft beer producers have differentiated their product by using local ingredients and labelling that are representative of their geographic location. The Italian craft beer product often reaches consumers through direct sales at the site of production such as at brewpubs and taprooms. In this way, consumers seek out, get to know and interact with producers differently than with commercial beer purchased at a grocery store. Craft beer producers and destination managers are developing ways to market their product and use it as a part of a territorial touristic offer. Like wine routes in Italy, craft beer roads could be developed in a way that enhances rural and regional tourism.

Wine trails have demonstrated potential for experiential tourism, where local cooperation and consumer involvement have aided territorial development of rural areas (Ingrassia et al., 2022). Craft beer roads may offer the same benefits to both tourists and local communities. A recent investigation of craft beer producers about prospects of the craft beer sector in Italy revealed that "encouraging craft beer tourism" was one of the highest rated interventions desired by craft beer producers. This was a priority that was just behind "improving commercial networks" and "educating consumers" (UbObiart, 2023). Examining the consumer profile and motivations for visiting for craft beer trails in Italy can contribute to understanding the market and be a valuable resource for developing future craft beer tourism offers within the rural and regional tourism sector. This thesis seeks to provide more information regarding an under-researched field (Murray & Kline, 2014) by investigating the consumer of craft beer roads as well as the challenges and opportunities within in developing craft beer roads as a tourism strategy.

Research on craft beer tourism has predominantly focused on the United States (Murray & Kline, 2015, Reid, 2021, Stone et al., 2020) and there is sparse literature about craft beer roads as a regional tourism offer in general, especially in Italy. Given the rising popularity of craft beer, surprisingly little academic work has explored the challenges and opportunities of tourism associated with the craft beer industry in Italy.

This aim of this study is to explore the potential for Italian craft beer roads to create new regional tourism opportunities. Craft beer roads can be included in tourism initiatives that want to encompass a gastrotourism offer linked to the specific territory. By identifying a profile of Italian craft beer road consumers and their motivations, it is possible to use this information to more effectively develop craft beer roads and strengthen the standing of those already existing. The following research questions have been identified to contribute to the existing research on craft beer consumers and craft beer tourism:

1. Who is the Italian craft beer road consumer? What are their motivations to visit a craft beer road?
2. What are the opportunities and challenges of developing Italian craft beer roads?

A mixed methods approach will be taken to address the research questions. A quantitative consumer questionnaire carried out sought to answer both research questions by investigating a particular beer road in Vicenza (in Veneto Region, in Northern Italy), called the Pedemontana Veneta beer road (*Strada dei Birrifici della Pedemontana Veneta*). The questionnaire aims to provide a profile of craft beer road consumers as well as reveal their preferences, knowledge, and motivations to visit the Pedemontana Veneta beer road. In addition to the questionnaire, craft beer industry reports were analyzed to gain insight into answering the research questions, particularly the opportunities and challenges portion. Answering these research questions may aid in determining the potential for other craft beer roads and influence future decisions regarding craft beer tourism as part of local development strategies. This approach has the potential to make a worthy contribution to the broader discussion about the role of gastrotourism in rural and regional tourism development.

One aspect of the investigation into the craft beer consumer profile is to analyze the consumer questionnaire results using Plog's (1974) traveler psychographic type. The goal is to determine to what degree an allocentric personality type would be more likely to visit a craft beer road than a psychocentric personality type. Making this connection between personality and tourism product preferences could be useful in determining what kinds of targeted marketing and development to apply to craft beer roads to attract a specific type of tourist. Doing so has the potential to contribute to rural tourism products involved in the growing craft beer sector in Italy. And, as proposed by Plog (1974), if destination managers and planners understand the psychographic curve, it is possible for them to control development and maintain ideal positioning of their tourism product which in this case is the Pedemontana Veneta beer road in Vicenza, Italy.

The rest of the thesis is structured as follows. Chapter 2 is a literature review describing relevant research related to the proposed research questions and how this study can contribute to the discourse on craft beer tourism. Chapter 3 covers the data and research methods where the craft beer scenario in Italy is discussed along with specific information on the Veneto region, and finally, the Pedemontana Veneta beer road in the Vicenza province. A description of the thesis methodology follows. Chapter 5 covers the results and discussion of the consumer questionnaire which is organized according to the questionnaire sections. The discussion consists of findings from the questionnaire as well as supplementary information from craft beer industry reports. These reports were used to find themes that connect to previous research and to suggest recommendations related to craft beer road development. Finally, Chapter 6 includes policy suggestions, study limitations, and future research opportunities. The final section consists of the references and appendices where a copy of the questionnaire can be found.

Chapter 2. Literature Review

In this section the existing literature related to craft beer consumers will be discussed, followed by theoretical background on tourist theory. An overview of craft beer tourism will follow, and finally, there is a transition to the concept of neolocalism which will be explained and applied to the craft beer consumer. To conclude, an exploration will be done on existing craft beer roads both in the United States and Italy highlighting some of the successes and challenges.

2.1 The consumer as a driver of craft beer tourism

Focusing on the craft beer consumer, the next section will review the current literature on the craft beer consumer socio-demographic profile, preferences and motivations. What are motivational factors for consuming craft beer and engaging in craft beer tourism? These revelations provide a baseline of information for the questionnaire used in this study where consumer socio-demographic profile and motivations for visiting a craft beer road are investigated. Understanding more about consumers of craft beer can be valuable to understanding how to better develop craft beer tourism such as beer roads.

2.1.1 The consumer profile

Consumer demand is an important component of tourism development, exploring what is currently known about the consumer profile of craft beer consumers in Italy and abroad could be useful in understanding their role in developing craft beer roads. Previous literature has defined a profile for the typical Italian craft beer consumer (Bimbo 2023, UBobiart 2023, Aquilani 2015, Kraftchick 2014) but this study looks to take it a step further and see if this profile fits with those who intend to visit a craft beer road. Consumers of craft beer are becoming savvier as their knowledge and exposure to the product continues to grow. In Italy, what was once an emerging market finding its way in a world of wine is now starting to carve out an important role while diversifying the beer market. According to Bimbo's (2023) survey done on Italian craft beer consumers, it was found that although Italians are "light drinkers" of beer they are most interested in specialty beer. They had a high concern for craft-made beers, taste, authenticity, uniqueness and sense of local identity.

The typical profile of an Italian consumer of craft beer (*birra artigianale*) has also been outlined in UBObiart's (2023) report. Based on their survey responses of beer consumers done in 2022, the median age of a craft beer consumer was 43 years with a medium to high educational level and a medium to high economic position. According to Assobirra (2019) and Garavaglia (2015) the number of people drinking beer has significantly increased, especially among the youngest and women. Using an online survey method gauging Italian consumers' willingness to buy (WTB) and willingness to pay (WTP) for craft beer, Carbone & Quici (2020) revealed that craft beer is appreciated by all people, yet young males dominated with 68% of the positive responses for WTP and WTB. Results showed that the decision to drink craft beer was mainly based on taste, the higher quality of raw materials, and to the fact that it is not filtered or pasteurized. Further supporting previous findings, Aquilani et al. (2015) conducted a questionnaire-based survey involving 444 participants at a local food event in Viterbo, Italy. The demographic for craft beer drinkers was primarily male (60%), between the age of 18-33 (65%), and employed full-time (57%). Based on a 1-6 Likert scale of importance regarding beer attributes related to purchase it was found that craft beer is chosen for its selection of flavors such as malted barley, chestnut and honey-flavored beers which increase the probability of perceiving craft beer to be of superior quality to commercial beer.

Looking to the United States, a study by Kraftchick et al. (2014) revealed similar demographics of the craft beer tourist with an average age of 38, mostly male (61%), and over 70% having a bachelor's degree. Another study on beer tourists by Stone et al. (2020) revealed that craft beer tourists were typically male, younger than 44 and more likely to drink local beer and wine. The typical beer tourists spent about 42% more on food and drink while traveling than non-beer tourists. This can be considered an important finding in relation to gastronomic tourism attractions such as craft beer roads because if craft beer tourists are willing to spend more there is potential positive impact on local economies. These findings support a study by (Barajas et al. 2017) which showed that craft beer consumers are in a higher-than-average income category which could explain a willingness to pay the higher price for craft beer.

In summary, the typical craft beer consumer tends to be male, less than 45 years old, and employed full-time with a medium to high education level in studies both in Italy and abroad. To complete the discussion on craft beer consumers, there will be a transition to their motivation and preferences. By identifying this profile as well as the motivations of craft beer consumers, more effective tourism products can be developed and destinations manager can market to the appropriate consumer segment.

2.1.2 Preferences and motivations

For a long time, beer consumers in Italy were mainly interested in drinking industrial beer. This can be attributed to the prevalence of large national and multi-national beer companies (Peroni or Heineken, for example) dominating the market resulting in a general lack of exposure to beer produced by smaller, craft breweries. Studies have shown that exposure is important because people who have already tasted craft beer are more likely to consume it since they look for higher quality (AssoBirra, 2012, 2013; Kleban & Nickerson, 2012). Today, the mass-produced and homogeneous lagers that prevailed are no longer the only options available. Numerous studies have shown that there is a shift in consumer preferences and what beer they are seeking out. A phenomenon called the "taste revolution" described by Kleban & Nickerson (2012) beginning in the United States eventually spread to Europe and small craft brewers gained favor with consumers. A search for locally produced and high-quality beer is happening, and this can be characterized by the concept of neolocalism which will be covered in more detail in the following section.

According to recent studies like Carbone's (2019) the most important factor that draws Italian consumers to craft beer are organoleptic qualities, particularly flavor, and a diversity of options that are available to try. Additionally, consumers in Italy have been shown to prioritize consuming craft beer that uses local raw materials, innovative products, and new styles and tastes (Donadini et al., 2017; Rivaroli et al., 2018). A 2022 survey of Italian craft beer consumers revealed that the adjectives they most used to describe craft beer were "tasty", "fresh" and "original" and that the most valuable elements of craft beer from a list of affirmations were "has greater ties with the territory" and "it's consumption supports small local producers" (UbObiart, 2023). Supporting the last statement is a study by Garavaglia (2010), that shows that beyond the sensorial aspects of a craft beer, what also influences consumers is the extra-sensorial aspects. This could be the local identity attached to a product or the sense of authenticity that is evoked by the product's marketing which is often related to place and rooted in a particular region.

Finally, opposite to industrial beer, craft beer emerges as an experience-based and symbolic product. The main motivation for many craft beer consumers seems to be the quest for authenticity: desire for more knowledge, new taste experiences, and moving away from the mainstream beer consumption. The craft beer consumers do not drink beer for its functional attributes, they consume it for what it means, resulting in building an identity, perceived as more authentic and unique, compared with the consumers of mainstream industrial beer.

2.2 Craft beer tourism

In referring to craft beer tourism this study uses an existing definition of 'beer tourism' which includes visiting breweries, beer shows, and beer festivals, where the key motivational factors are experiencing elements of the beer region, and tasting the product (Plummer, et al., 2005). Not surprisingly, this description was adapted from the definition of wine tourism proposed by Hall et al., 2003. Reid (2021) summarized the various types of beer attractions which are: breweries, bars and pubs, beer museums, beer trails, beer festivals, and beer conference or trade shows. The focus of this thesis is on beer trails, or beer roads, which are used interchangeably. Beer trails have mostly been studied in the United States as the craft beer tourism sector has been around longer, but the literature on beer trails as a rural tourism product are increasing. The definition of a beer trail, according to Slocum (2018) is a "collaboration of breweries located in close proximity to each other, and often involves join marketing efforts to promote beer consumption as a tourist activity."

An interesting concept here is that although a beer tourist primarily travels for beer, it is possible for non-beer consumers to also be considered a beer tourist because there are other pulls from beer related attractions that could be interesting for the tourist. Examples include socializing with friends or enjoying live entertainment at a brewery or eating in a brewpub with an extensive menu. While not traveling exclusively for beer, the tourist nonetheless has a potentially positive impact on the local community in terms of income generation and promotion of a local products in their activities that are ancillary to beer. A study by Stone et al. (2020) revealed that even non-beer tourists visited beer-related attractions such as sightseeing and visiting historical or cultural sites during their visit. Research on craft beer tourism, although limited, suggests that beer tourists exhibit a significant interest in diverse activities. They tend to show a higher openness to new experiences and a desire to broaden their taste preferences, encompassing not only beer but also various food and beverage experiences. Conversely, non-beer tourists may prefer more familiar and less challenging activities, and typically in fewer numbers.

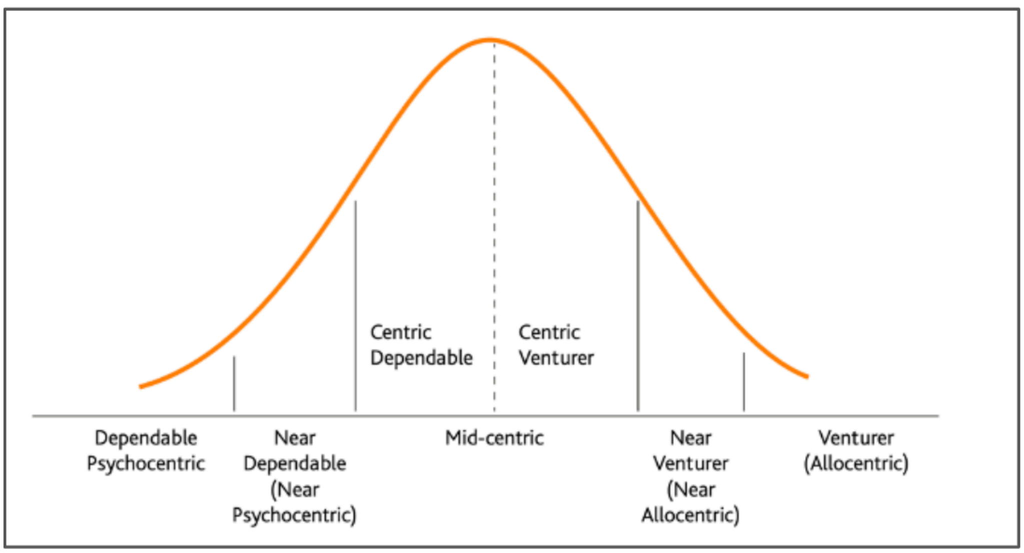
For many businesses in the agro-food and wine sector, tourism can represent a diversification strategy. For example, through the involvement in tourism, wineries can generate direct sales, educate visitors, help develop wine tourism or wine trails, and overall, contribute to the enhancement of regional destinations' image and branding (Vos, 2019; Ashton, 2014). Can craft beer follow along the same trajectory as wine tourism, particularly with craft beer trails? According to Murray and Kline (2014, p. 4), "breweries are understudied and are a ripe area for investigation." Collaboration is a key component of developing craft beer tourism (Plummer et al., 2005, 2006) and remains one of the main challenges in developing the sector. The craft beer tourism sector is one with much potential, especially for territorial promotion and local development. A recent survey of 700 Italian beer consumers by Unionbirrai revealed that 21% of male tourists had visited at least one brewery since 2020 and that 22% of those aged 18-44 years old had a desire to visit a craft brewery (UbObiart, 2023). The desire on behalf of the consumer is there, but the stakeholders related to development of craft beer tourism, especially roads, include local authorities, destination management organizations, and the producers themselves must collaborate.

2.3 Tourist theories: Plog's tourist psychographic model

Tourism is dynamic and its development does not happen in a unilateral or even way throughout communities. Because of this, it is helpful to find ways to identify the drivers of development and to try to find patterns that underlie development. Tourist theories can help shed light on the behavior and motivations that play a role in developing tourism destinations. In this section, Plog's tourist typology (1974) will be analyzed. By identifying the typology of a tourist, or consumer with Plog's model, a better understanding of how a destination can be developed may come to light. It can help to address the research question of "Who is the craft beer road consumer?" Plog's destination life cycle (2001) is directly influenced by the type of tourist and what their motivations are to visit since it is the consumer demand and preferences that often drives the development of destinations. Models such as Plog's are applicable to gastronomic tourism and the subset of craft beer tourism because they can help provide a framework for how to analyze potentialities of tourist destinations.

Stanley Plog's tourist typology model, introduced in 1974, is one of the most extensively studied theories in tourism. This fundamental theory, which was later renamed the Venturesomeness model in 2002 (Cruz-Milán, 2022), blends personality-based psychographics with the evolutionary trends of destinations. It claims that tourists fall on a spectrum from allocentric (adventure-seekers who favor exotic locales) to psychocentric (those who seek safety and prefer familiar places) (Smith, 1990). Psychocentrics typically select well-known destinations, whereas allocentrics opt for unexplored and unique trips. Later, Plog (2001) rebranded these groups as Dependables (psychocentrics) and Venturers (allocentrics). This model categorizes travelers on a scale from Dependable (psychocentric) through various stages to Venturer (allocentric). Although Dependables and Venturers constitute a small fraction of tourists (approximately 2.5% and 4%, respectively), most people fall within the mid-centric range, displaying a mix of travel personalities (see Figure 2.1).

Figure 2.1. The psychographic personality types



Source: Piuchan (2018)

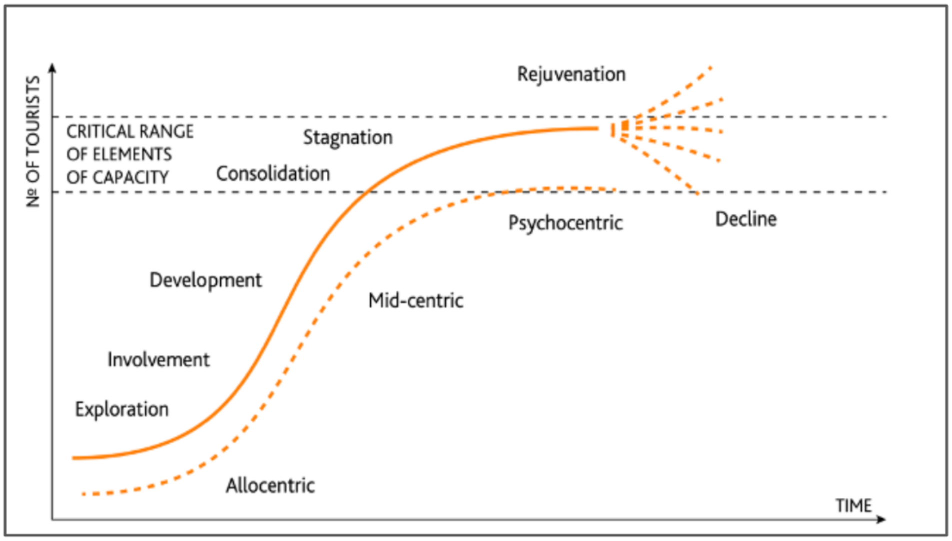
On a similar basis, Plog suggests that destinations evolve, initially discovered by allocentric venturers, followed by mid-centrics as infrastructure improves, and eventually attracting more dependables (Plog, 1974; Plog, 2001). A tourist's placement on the allocentric-psychocentric spectrum influences their travel destination choices. And, according to Plog, this model is more effective in segmenting tourists than socio-demographic characteristics alone. This psychographic categorization helps define specific markets and predict destination preferences, making it highly appealing to the tourism industry. While not offering absolute predictions of tourist behavior, the model has the potential to categorize tourists based on their preferred destinations and indicates their preferences (Smith, 1990).

Plog (2001) concluded that improper management and unplanned development could lead to the decline of destinations. Looking at destinations with tourism potential, there should be a dual objective which seeks to balance development with safeguarding the integrity of the community for those who live there. This would involve developing the resources of a territory to promote tourism while creating policies to ensure the social, economic, and environmental aspects of tourism flows are managed. After all, tourist destinations are also made up of residents whose realities of daily life should not be upended. Venice, Italy is an example where tourists flows have become unsustainable for the city and the city has been forced to take measures to manage the social, economic and environmental impacts. The fragile infrastructure can no longer handle the number of tourists that visit each year, (around 35 million). Many tourists would enter on cruise ships which damage the surrounding coastline and stay one day in the city and is referred to "hit and run" tourism and make up 80% of tourists to the city. The resident population continues to decline due to rising rent costs which has been an effect of tourists' ability to pay more than a resident for temporary housing. According to figure 2 showing Plog and Butler's combined models, Venice would have entered a critical stage where either decline or rejuvenation occurs. The fate of the destination is then in the hands of stakeholders in the tourism community such as local government who can create new tourism policies. In this case, the response was to create a tourist tax to slow the influx of visitors and to ban cruise ships from entering the Venice lagoon. Both decisions were possibly late in coming, but critical to ensure the sustainability of Venice as a tourist destination but also a community to live in.

Previous tourist studies have mostly been from the United States and have shown likeliness to visit wine roads, or that their psychographic type will visit certain types of locations. The implications of a psychographic type are many, including the marketing and segmentation of a customer or tourist base for a destination's tourism development. While Plog's model was based on American tourists, there has been some application to other countries. This has been done successfully in studies in foreign countries such as Canada, Portugal, and Australia (Plog, 2001). According to Plog (1990, p. 44), 'every nation has citizens who are outgoing, self-confident and venturesome (allocentrics), and those who are not. But the way that behavior is expressed may vary from country to country depending upon cultural subtleties and inhibitions. Another important observation is that psychographic type is not the only determining factor for travel destination choice. For example, distance, availability of time, travel expenditure and effort to visit also create boundaries to certain destinations and narrow the tourist types (McKercher, 2005a). While Plog's model has its known weaknesses, it can nonetheless be useful in determining a baseline or general profile of the type of tourist that is most likely to be a craft beer tourist or make intentions to visit craft beer tourism destinations such as craft beer roads.

Complementing Plog's tourist model is Butler's (1980) tourism destination life cycle, which tracks changes in a destination over time. This model outlines six distinct stages that a destination may progress through, highlighting that destinations are dynamic and evolve in response to shifts in tourist interests and market trends. The model also acknowledges the role of various stakeholders such as residents, policymakers, and tourism operators in influencing these changes. For instance, when stakeholders do not share a unified vision for a destination, it can lead to conflicts or, at the very least, cause delays in tourism development. In some cases, development may occur at a pace that does not benefit the community. Similarly, policymakers may aim to develop tourism to support the local economy and promote the region, but without the cooperation of businesses and tour operators, even strong tourist demand may not lead to successful outcomes. By understanding the current stage of a destination's development, stakeholders can implement effective strategies to maintain sustainability and manage the destination's image proactively. A challenge faced by many tourism destinations is identifying and maintaining the right balance of tourists without overwhelming the local community and infrastructure. The goal is to encourage thoughtful growth rather than merely restricting it, aiming to enhance the quality of life for local communities (Croce & Perri, 2017). In this thesis, Butler's refined model is applied to craft beer trails, which are currently in the exploration phase. The question is whether allocentric travelers intend to visit these craft beer trails more frequently than psychocentric travelers. Figure 2.2 integrates the Plog and Butler models to illustrate how destinations evolve in relation to different psychographic traveler types.

Figure 2.2. The refined curve of Plog's personality types to Butler's model



Source: Piuchan (2018)

2.4 Neolocalism and applications to the craft beer industry

A term coined by Shortridge (1996), neolocalism can be described as a consumer's desire for local products. Essentially, it is the emphasis of local connections and has been studied widely within the discourse on culinary tourism. The concept of neolocalism has been applied to tourism, and particularly to gastrotourism because it embodies many products that are closely tied to local production and consumption. The concept is relevant to this discussion on craft beer in Italy because the main characteristics of craft beer is that it is made by small, independently owned breweries that often use ingredients and production methods that are linked to the territory. Craft beer producers can create persuasive marketing strategies by using telling the story of the brand, and by emphasizing the product's connection to a locality by using imagery and naming. The emphasis on small is really demonstrated in Italy as craft breweries are producing less than 200,000 hL annually while craft breweries in the United States can produce up to 7,000,000 hL and still be defined as a craft brewery.

According to Spracken et al. (2013), neolocalism has become a significant asset to tourism development because of its symbolic ties to place and culture. Alongside the quality of the product, the strength of Italian breweries is the ability to evoke a sense of belonging to the territory, to create identity and loyalty, to "reconnect" people with their territory. It is a form of neolocalism in which the brewmaster tries to rebuild a sense of attachment to his community and his economy, giving the drink a history, often built on a romantic discourse on the local and on the artisanal tradition (Pratt, 2007). In Italy, craft breweries often use images or labels that refer to stories, local legends or natural attractions of a specific place or region where the craft brewery is based. This branding strategy is complemented by using trademarks or certifications on the label. Examples of trademarks are *Birrificio Independente* and *Birra Agricola* and indicate quality and place of production. Figure 2.3 depicts images from craft beer labels from producers in the Vicenza province of Italy showing the use of imagery or name tied to a specific location as examples of neolocalism.

Figure 2.3. Labels for Birra Agricola Due Valli, Birrificio Veneto, and Birracrua

Source: www.birrificioveneto.com, www.birracrua.it, www.birraduevalli.com

Birrificio Veneto describes the significance of their label by saying “we chose two icons: one of the lion which is an emblem of our region and metaphor for determination and courage that led to the birth of our brewery, and the other is a depiction of a hop flower. Their combination has generated a stylized icon for which we are proud to identify with.” (www.birrificioveneto.com). Similarly, the concept of “Sense of place” was termed by Hede and Watne (2013). A 2016 case study on Montana’s craft breweries demonstrated how breweries can be influential in creating a sense of place which is an attraction for tourists (Fletchall, 2016). Craft brewery tourists were seeking satisfaction with the craft beer product, a desire to connect with the community, and unique products. Also noted in Murray and Kline's study (2014), repeat business correlated with locality, and those most concerned with helping the community were the ones who repeatedly frequented the local brewpubs, supporting the importance of "sense of place." How this ties into tourist typology in terms of local or national tourist versus international tourist can be interesting to investigate for craft breweries. Local tourists may have the potential to support craft breweries long-term in a more sustainable way than international tourists because they are a more reliable, year-round customer base and have more intimate understanding of the craft beer product. Afterall, craft breweries often depend on the local communities for success which leads breweries to becoming part of the identity of a place. They tend to remain rooted in local communities and foster an attachment by creating a unique identity (Reid et al., 2014).

2.5 Beyond novelty: craft beer roads creating new opportunities

Research indicates that craft beer roads have played a significant role in community development and revitalization (Plummer 2015, Pezzi 2017, Mitchell and Vanderwerf 2010). As a part of gastronomic tourism, craft beer is more than just a product; it embodies social and cultural heritage and can drive regional development through innovation and knowledge, as noted by Skoglund et al. (2020). While much of the research on this topic has focused on the United States, other countries have also successfully incorporated craft beer into their tourism offerings. This section will explore various global examples of craft beer roads to understand the strategies employed by tourism stakeholders to create effective craft beer tourism experiences.

In the United States, craft beer roads vary from formal to informal setups. Formal beer roads might include organized transportation and guided tours with tastings, often featuring breweries close to each other, forming a brewery district where tourists can easily visit multiple locations in a day. In Canada, Plummer et al. (2006) conducted a multi-year study of the Waterloo–Wellington Ale Trail in Ontario, revealing that up to 70% of participants considered the trail an important or very important factor in their visit, with the proportion of visitors from outside the immediate region rising from 58.2% in 1998 to 64.9% in 2000. The Finger Lakes Beer Trail in the U.S. takes a less formal approach, dividing a large area into smaller, manageable itineraries and using a website[1] to suggest regional visits. In the UK, the national rail system has been utilized to transport tourists between breweries located near rail stations (Gildea, 2016). In Michigan, USA, a more adventurous option involves combining biking and kayaking to visit breweries. These examples illustrate how various communities have utilized their geography and infrastructure to foster craft beer tourism. The usage of maps to inform and engage consumers is also an important aspect of successful craft beer tourism marketing. A study by Feeney (2017) analyzed 88 beer trails in the U.S. where local tourism agencies utilized a map to promote their tourism product. Figure 2.4 shows one such beer trail map of North Lake Tahoe Ale Trail in Nevada that serves as a good example where experiential activities near craft breweries were included. It was concluded that a well-designed, effective map could promote not only craft beer, but also persuade visitors to travel to a region, enjoy the local environment, engage in a range of experiential activities, and essentially influence the success of a region.

Figure 2.4. North Lake Tahoe Ale Trail map

Source: Feeney (2017)

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[1] Finger Lakes Beer Trail: https://fingerlakesbeertrail.com/content/intineraries

One of the most notable successes in using craft beer tourism to boost regional development is found in Apecchio, Italy. This small village in the Marche region, with a population under 2,000, is part of the Italian National Strategy for Inner Areas (SNAI), indicating it needs strategies to address its declining population in part due to the distance residents live from essential services (Rossitti et al., 2021). In 2012, Apecchio incorporated craft beer into its regional marketing strategy, focusing on its three local breweries. Since then, the community has united to support various initiatives related to these breweries. The town has branded itself as '*Apecchio Città della Birra'* (Apecchio, the Beer City) shown in Figure 2.5 and created a national association shown in Figure 2.6. It also hosts the Alogastronomia Festival, which blends local craft beer with food and draws approximately 4,000 visitors annually (Pezzi, 2017). The festival's success is attributed to effective collaboration among local tourism stakeholders.

Figure 2.5. Apecchio, The Beer City

Figure 2.6. National Association for Città della Birra

A 2021 survey of 65 craft beer producers in Italy's Veneto region highlighted key challenges in developing craft beer roads, including the need for better "coordination of promotional actions between producers" and the "development and creation of specific events for the sector" (Veneto Agricoltura, 2021). These concerns align with the tourism potential of craft beer roads like the Pedemontana Veneta beer road, the focus of this thesis. Similarly, a multi-country study by Duarte et al. (2017) revealed that while craft beer roads and brewery tours in Italy and Spain present significant growth opportunities, they face challenges such as lack of cohesion among brewers, insufficient institutional support, and a weak regional identity as craft beer destinations.

The concept of collaboration is key when discussing craft beer tourism initiatives. Carbone's (2016) study revealed the importance that public authorities have in the dissemination of product knowledge. They can make a product (craft beer in this case) more recognizable through promotion of activities related to the territory and local economy. These could be through local fairs and events, and by supporting the creation of networks among stakeholders. In the case of craft beer, stakeholders could be the producers, tour operators, restaurants, and public authorities like a tourism council. These insights, particularly when compared to the successful model of craft beer tourism in Apecchio, Italy, offer valuable perspectives for the future development of craft beer roads in other communities.

Chapter 3. Data and Methods

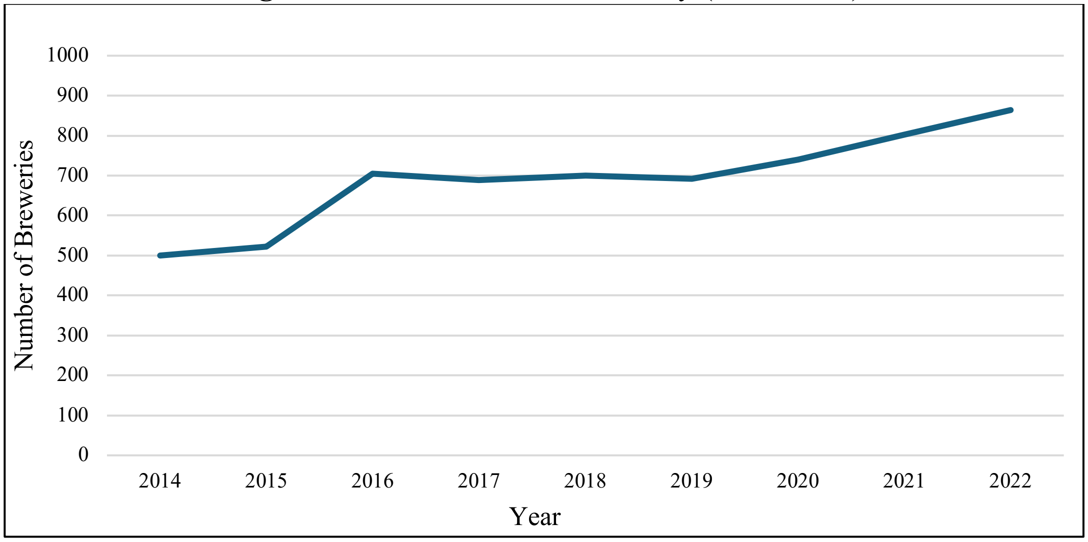
To provide background information and set the context for the thesis research questions, this section will give an overview of the craft beer situation in Italy. It will go from a broad country-wide discussion about the market and consumer trends to more detailed scenarios of the Veneto region, Vicenza province and finally, the Pedemontana Veneta craft beer road which is the focus of this research. The second portion will discuss research methodology with an explanation of how and why the approach was taken.

3.1 The Italian craft beer scenario

Italian craft beer doesn't have the history or tradition that wine or *grappa* does, however, the current phenomenon of the so-called *craft beer revolution* has been well documented (Fastigi et al., 2018, Fastigi and Cavanaugh, 2017). This revolution characterized by a rapid increase in the number of craft breweries operating and increased consumer awareness has been occurring since the mid-2000's. In the year 2003, there were under 100 craft breweries in Italy, and by 2015 there were over 800 (Brewers of Europe, 2022). As of 2022, there were approximately 862 microbreweries (Figure 3.1) and combining all of the beer business types (microbreweries, beer firms and brewpubs) there were 1,526 as of 2019 (Veneto Agricoltura, 2021). According to a survey of 130 craft brewery operators in Italy, the largest number of craft breweries opened their doors between 2011-2022, representing 74% of those currently operating (UbObiart, 2023). The number of craft breweries opening has begun to slow down, and there is discussion about market saturation and increased competition, but nonetheless the craft beer culture continues to spread throughout Italy.

While craft beer is a niche segment of the Italian beer market which is dominated by large beer companies like Peroni and Heineken, it is becoming increasingly relevant because of the level of interest by consumers and recent organizational and governmental support. According to Mike Benner of the European Beer Consumers' Union website, a recently formed alliance of 9 countries called Independent Brewers of Europe (IBE) which includes Italy, was formed in 2024. He stated "We're very pleased to see progress in establishing a much-needed voice for independent brewing organizations across Europe. The craft beer revolution has spread across the continent and with well over 5,000 breweries the sector is well-placed to supply the diverse range of high-quality beers demanded by today's discerning drinkers" (Benner, 2024).

Figure 3.1. Microbreweries in Italy (2014-2022)

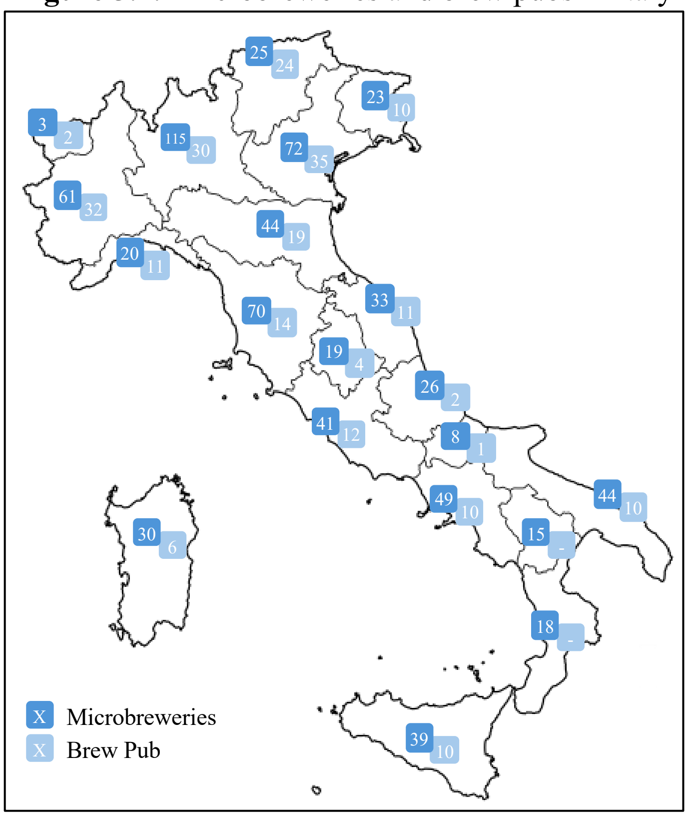


Source: author's elaboration on data from: https://brewersofeurope.org/

The craft beer sector in Italy has been influenced by the cultural diffusion of other beer producing countries such as the United States and Germany. However, the sector has become uniquely Italian by brewmasters' use of local ingredients, creativity, and innovation that have resulted in great product differentiation. The 'Made in Italy' brand characterized by quality and craftsmanship can be reflected also in the Italian brewer's craft beer. It has become known worldwide for its original taste and style (Fastigi, et al., 2015). The beer has adapted to the culture of the country and not the other way around, and not only that, due to the countless possibilities of ingredient combinations there is a perfect beer for anyone who seeks it out. For the last 5 years, Italy's beer reputation has also been ranked between the first and fourth out of the 27 EU countries surveyed by the Beer Image Tracker Research promoted by the Brewers of Europe (Assobirra, 2023). As with wine, Italian craft beer utilizes *terroir* with the examples of using local water sources for brewing as well as using locally produced malt and hops. As described by Coal et al. (2021), there is a cultivar of hop, Cascade, perfectly suited to be grown in Italy to create its own sensory characteristics that is being developed. Additionally, Italy is becoming a larger producer of barley and malt which enhances the connection between craft beer and *terroir* supporting the 'Made in Italy' brand. In Italy, barley, one of the raw materials used to make beer, is slowly increasing in production and has increased approximately 18% over the last 10 years (Statista, 2023) and the number of malthouses continues to increase. With a supply chain that is shorter and more locally oriented, the outlook for craft beer to be a sustainable sector within the larger Italian beer market is promising.

The geographical distribution of craft breweries in Italy in figure 3.2 shows that most microbreweries and brewpubs are concentrated in the north of Italy. The beer sector in Italy is predominant in off-trade activity (67%) according to Brewers of Europe which means wholesale and retail shops like supermarkets. However, for the craft beer sector, the main channel of distribution is through alehouses, bars and restaurants in the area in which they operate (UbObiart, 2023).

Figure 3.2. Microbreweries and brew pubs in Italy

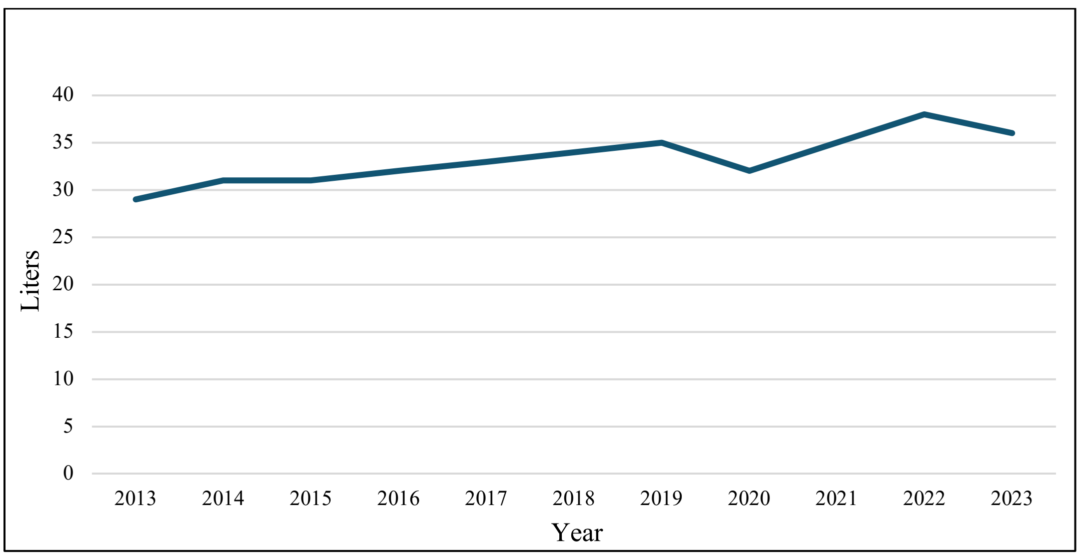


Source: Author’s version from Assobirra Annual Report (2023).

As of 2023, the per capita consumption for Italians was 36.1 liters per year which is increasing but still quite low compared to other European countries. Except for the change from the years

2022-23, (see Figure 3.3), consumption has increased by 20.1% over the last decade indicating that beer is becoming part of Italian food culture (Assobirra, 2023). In 2022, the per capita beer consumption was 38.2 liters per year, which almost reached the consumption of wine which was at 41 liters that year (Statista, 2024). Interestingly, even though beer consumption per capita is on the lower side compared to other European countries as of 2021, Italy ranks fifth in the number of direct employment in the beer sector and has had a steady increase since 2008. Also notable is that the number of active microbreweries in Italy is relatively high at 862 considering the low per capita consumption and that Italy had the second highest total imports (intra and extra-EU) in all of Europe. (Brewers of Europe, 2022). Starting a microbrewery where pro-capita consumption is low implies that there must be a consumer demand that includes a willingness to pay for higher quality in lieu of quantity, and strong marketing skills for product promotion.

Figure 3.3. Per capita beer consumption in Italy from 2013-2023



Source: author's elaboration on data from: https://brewersofeurope.org

Despite Italy's per capita of craft beer consumption being lower than most other EU countries, consumer interest in craft beer appears to remain steady. A survey conducted of 700 Italian beer drinkers in 2022 revealed that 58% were habitual craft beer drinkers and responded that they have a high product knowledge and product involvement. In the same consumer survey, those indicating that they have increased their craft beer consumption in the last four years was 35% and those indicating their annual spending has increased was 44% of respondents (UbObiart, 2023). As shown in Table 3.1, from 2018-2023 the market segmentation between types of beer is shifting from lager beer (down 3.87%) to specialty beer (up 3.71%). In fact, many craft brewers produce specialty beers that include local ingredients such as chestnut and honey. A survey done in 2018 of 1,020 Italian beer consumers showed that 56% of respondents "quite agreed" that specialty beer tastes better than normal lager beer and 53% responded that specialty beer paired well with food very well (Statista, 2022).

Table 3.1. The beer market in Italy: key facts 2018-2023

	2018	**2023**
Beer production (million hL)	16.4	17.4
Beer consumption (million hL)	20.3	21.2
Beer exports (million hL)	3	3.6
Beer imports (million hL)	7	7.4
Beer consumption per capita (L)	33.6	36.1
Microbreweries (*n*)	692	750
Brewpubs (*n*)	170	243
Market share of type of beer		
Lager	86.60%	82.73%
Specialty beer	11.70%	15.41%
Low/no alcohol	1.70%	1.86%

Source: author's elaboration on data from AssoBirra Annual Report (2023)

There is a diffusion of craft beer culture that is reflected in this increase in consumption amount as well as consumption habits. For example, beer is now making its way more often to the dinner table, and what was once considered primarily a summer drink is being consumed throughout the year. Some of this can be attributed to events that have promoted beer in colder months. One such event as organized by the brewery Montegioco in Piemonte where beer tastings were done outdoors during the winter months (Assobirra, 2023). Additionally, beer is becoming a drink that more consumers are interested in trying when paired with food in a similar way that wine is.

3.1.1 Timeline of Italian craft beer development

While the first craft brewery opened in 1985 in Sorrento, Italy the year 1996 is widely accepted as the birth of the craft beer movement. Since the opening of the first three main actors in the craft beer scene (Baladin, Birrificio Italiano and Birrifico Lambrate), there were numerous challenges that the emerging industry faced. For one, there was no official definition of what craft or artisanal beer was by the government. Industrial beer was what most Italians knew, and there was an established tax code and process of permitting and regulation in place. The concept of craft beer being "alive" because it was unfiltered and unpasteurized was not something that was readily accepted or understood by consumers or regulating bodies. Recalling what Teo Musso of Baladin had to say about the Italian beer market "the challenge is to overcome the cultural concept that beer is a hot dog, low class", there was an initial rejection of craft beer that took time to change (Jansing, 2014, p.16). To attempt to elevate craft beer to the distinguished level of wine in the consumer's eye, craft beer producers had begun to make the beer bottle shaped similarly to a wine bottle with elegant labels. This way, when put on the dinner table or restaurant table, it signaled to the consumer that it was appropriate to serve alongside food, as wine is. An interesting theme emerges throughout the histories of the craft breweries in Italy which is that the interest in beer was either sparked or perpetuated through the exposure to other countries' beer cultures. For example, many of the Italian beer producers had visited countries like Germany, the United States and England and were inspired to create similar beer recipes and sensorial aspects in their beer. Being that Italy initially lacked a strong craft beer culture, it was like a blank slate where the brewers had full license to express themselves.

Consumer demand is a part of the reason for the growth of Italian craft brewing, but the organization of craft brewers into associations along with government legislation have been contributing factors as well. This was not always the case in Italy, as the formation of craft beer producers into an organized groups like consortiums and associations is a recent but growing trend. The organization Unionbirrai is a cultural association that began in the year 2000 and has been responsible for the promotion, protection and information-sharing of Italian craft beer. They also organize courses, tastings and beer events. It has become the meeting point for the needs of producers, distributors, and final consumers. It can be seen as the Italian version of the United States' Brewer's Association which originated in 2005. One of Unionbirrai's biggest successes was to get the Italian national government to recognize small producers (less than 10,000hL annually) which has positive implications for their tax obligations. Assobirra is another important organization in the craft beer sector, but with a focus on industrial beer rather than craft beer.

However, the reporting that is done by this organization is important because it represents the overall beer production, among other things, specific to Italy.

In July of 2016 the Italian craft beer industry made an official legal definition for artisanal beer (Law No.154). It is “beer that is produced by small independent breweries and that does not undergo pasteurization or microfiltration.” The meaning of independent is that the brewery is not connected legally or economically with any other brewery. To qualify as a small brewery, no more than 200,000 hectoliters of beer can be produced annually. Figure 3.4 shows the trademark for Independent Breweries (*Indipendente Artigianale*) which is a registered trademark in Italy that all breweries recognized by the Unionbirrai trade association. In 2019, the Italian Beer Consortium (*Corsorzio Birra Italiana*) was created with the support of Coldiretti.[2] It is the first national alliance dedicated to the promotion and protection of craft beer produced from the Italian agricultural supply chain. Figure 3.5 shows one of the four trademarks for this consortium. It aims to guarantee the national origin of raw materials and to safeguard, protect and promote craft beer in Italy by enhancing the local production chain. The actors involved are the agricultural producers, malthouses and independent breweries. Most recently, in 2024, the trade group Independent Brewers of Europe was created which involved 9 countries and includes Italy.

Figure 3.4. Trademark for Independent Artisan beer guaranteed by Unionbirrai

Source: www.unionbirrai.it

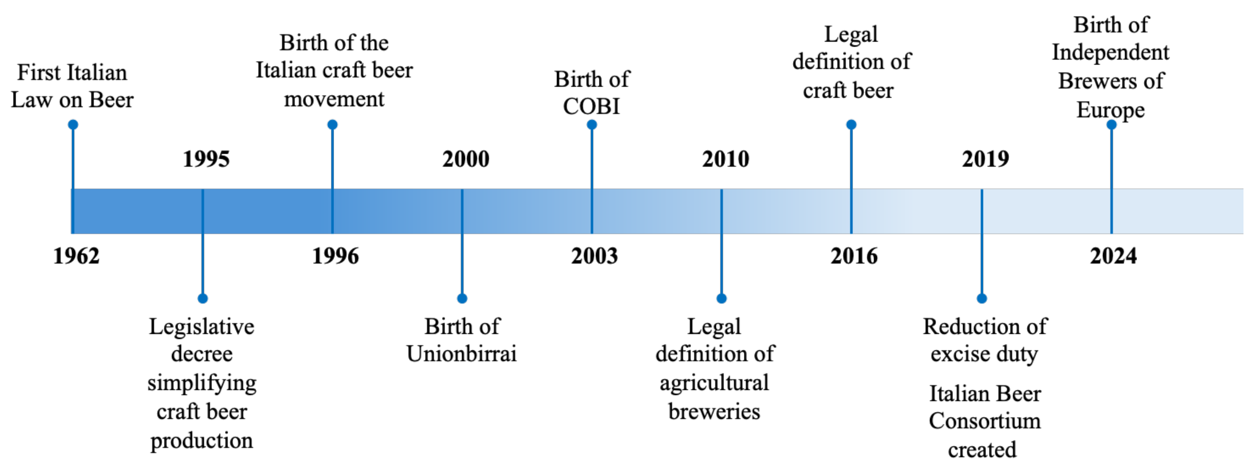
Figure 3.5. Trademark for Consortium of Italian Beer

Source: www. https://www.consorziobirraitaliana.it/

[2] Coldiretti is the main organization of agricultural entrepreneurs in Italy and Europe. It represents approximately 1.6 million farmers and has 20 regional federations and 95 inter-provincial federations.

Figure 3.6 shows a timeline recapping some of the important dates surrounding Italian craft beer, including the first craft brewery registered and the legislative changes occurring over the years.

Figure 3.6. Milestones for Italian craft beer



3.1.2 Craft brewery typologies: beer firms, brewpubs & agricultural breweries

There are a few different categories of craft beer producers in Italy. Although they each have the same regulations on the quantity produced, they vary in their ownership of processing plants and distribution channels. The most relevant typologies are the following ones:

- *Brewpubs* are small independent breweries that produce beer at their own processing plant and sell their beer on their premises. Typically, there is a selection of food available that pairs with the CB.
- *Beer firms* are those companies that rent the facilities of another company to produce their beer recipe under their brand. One reason this may happen if the craft brewery does not have the financial capital yet to invest in the production facility or equipment.
- The craft brewery, or *microbrewery* is a brewery that produces beer in its own production plant and sells mostly outside of their facility. They can sell directly to consumers on site, but it is often a marginal activity. Typically the yearly production of a microbrewery is no more than 1,000hL). The addition of taprooms are becoming more popular for microbreweries, however, and gives consumers a chance to taste the beer and purchase on site.

- *Agricultural breweries*, called *Birrifici Agricoli* in Italian, are producing a portion of their own raw materials for beer production on site. The Italian government requires that this kind of production include at least 51% of the raw materials be produced on site. For an agricultural brewery to be a part of the COBI (Italian Consortium of the Producers of Beer Barley) consortium, and use the *Birragricola* designation, however, 70% of the raw materials must be produced internally by the consortium (COBI Agricoltura) which includes the use of COBI's malthouses. This type of craft brewery is gaining popularity in Italy due to the reduced and streamlined taxation and ability for farmers to receive rural development program (RDP) funds from the European Union (Gazzetta, 2010)

3.1.3 Agricultural breweries and rural tourism development

The evolution of the agricultural beer sector in Italy has been spurred by the formation of alliances of Unionbirrai and consortiums such as COBI as well as by national legislation. As of 2010 an Italian ministerial decree (No. 212/2010) has considered beer to be an agricultural product which shifted the development of beer production to the level of the primary sector. The collective trademark (*Birragricola*) that can be used by agricultural breweries is shown in Figure 3.7. It can be used on beer labels to signal to consumers origin, quality and compliance with agricultural brewing. This type of brewery can be a way for farmers to diversity their crops by producing the raw materials to produce beer such as barley, hops, herbs, and fruit. Barley was once primarily grown for animal feed, but now, it is also used to produce beer which has improved the farmers' profitability for the crop. Because this type of beer production is done in agricultural areas, it can be considered a component of rural development. Agricultural breweries tend to be larger size but also have more of a business orientation and tend to create local supply chains. For these reasons they may represent a real opportunity for the long-term success of the Italian craft brewing industry (Fastigi et al., 2016).

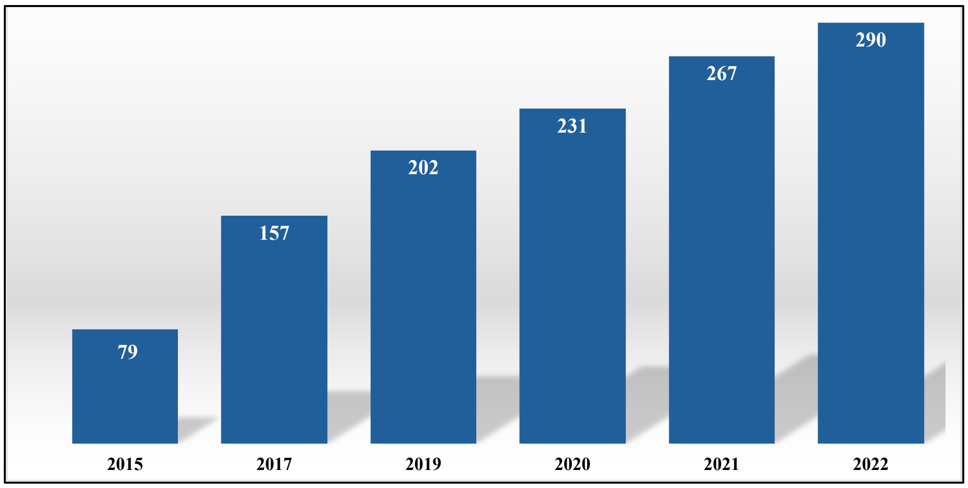
Figure 3.7. Collective trademark for Italian agricultural beer

Source: https://www.birragricola.it

Involving agricultural breweries in gastronomic tourism such as craft beer tourism can create new opportunities for the primary sector. Recent research on craft beer consumers supports the popularity of Italian agricultural beer. Based on a 2022 survey of 203 Italian craft beer consumers, 49% of Italians responded that they frequently drink agricultural beer, and another 16% responded they had it any time they had an opportunity. There is a good outlook for this sector to expand and develop their local consumer base (UbObiart, 2023). The ability for craft beer consumers and to immerse themselves in the agricultural aspects of craft beer production could be a positive feature for craft beer tourism development. For example, if breweries along a craft beer road offer tours, the added experience of walking through hop or barley fields and tasting the product could be a memorable activity for craft beer consumers that connects them to the territory and product. The concept of "countryside capital" encompasses this example and refers to re-conceptualizing rural resources as an asset in the rural tourism industry (Garrod et al., 2006) and can be a way to ensure the integrity of rural areas is safeguarded. In the case of agricultural breweries, rural communities do not have to choose tourism over agriculture and instead can combine the two.

As stated by the 2022 report by UbObiart, from 2019-2022 there was a 14.1% increase in the number of businesses producing beer that declared they had agricultural cultivation connected to beer production (UbObiart, 2023). This is in direct relation to the recent legal recognition of beer as an agricultural product in Italy and highlights the impact that favorable legislation can have for business development. Veneto, where the province of Vicenza lies (the focus of this thesis) has the second highest number of agricultural breweries in Italy (behind only Lombardia) with 48 businesses as of 2022 and representing roughly a third of all craft breweries in Veneto (UbObiart, 2023). According to Assobirra (2023), local malt production has increased by 17% in the last 10 years and the reliance on imported roasted malt is decreasing. Figure 3.8 shows the growing number of agricultural breweries in Italy.

Figure 3.8. Agricultural breweries in Italy 2015-2022



Source: author's elaboration of data from UbObiart (2023)

3.2 Craft beer in the Veneto region

Moving into the Veneto region of Italy, the craft beer trend has followed that of the rest of the country and has experienced significant growth in recent years. Veneto has a strong wine culture but continues to support the dynamic craft beer movement as it continuously evolves in response to consumer and legislative influences. Veneto is one of the top craft beer producing regions in Ital and craft breweries represent an opportunity for the area that can be supported as a young, dynamic and rapidly growing economic reality. However, recently a slowdown of new craft breweries opening has been observed in Veneto, and competition between businesses was seen as a critical issue for producers. Veneto makes up 10.9% of the total craft beer production in Italy as of 2019 (Veneto Agricoltura, 2021). The trend for these businesses to shift beer production to their principal activity is also increasing shown by a 11.2% increase from 2019-2022 (UbObiart, 2023). As of 2022, there were 138 active breweries in Veneto, and 39% of the breweries are considered agricultural breweries. The addition of businesses categorized as agricultural breweries is notable in Veneto because 13 new businesses have been opened in just the last 3 years which falls only behind the Lombardia region. Regarding terroir, Veneto has access to high-quality spring waters from the nearby Alps and Dolomites that can be used as one of the raw materials in craft beer production. The sales channels are primarily through direct sales and ho.re.ca. in Veneto and many producers are beginning to open taprooms. Here, the consumer can taste the beer on site before purchasing and the supply chain is shortened this way, making the sale more profitable due to lesser intermediaries as with wholesale or distribution channels. This type of distribution would support the PV beer road since tourists would be visiting the PV breweries directly and likely want to try the beer before purchasing.

Recently, in 2019, Veneto passed legislation in favor of reducing the excise tax for the craft brewing sector. Small craft breweries producing no more than 10,000 hL per year could qualify for a 40% reduction in excise tax (LRV n. 7 of 16 February 2018). The objective for this was to encourage craft beer production with a territorial identity and the use of local raw materials. As of 2021, Italy contributed the highest amount of excise tax on beer in the EU (694 million euros), so the reduction of this tax is a much-needed fiscal break for craft beer producers. (Brewers of Europe, 2022). One of the raw materials, barley, had increased in production from 2019-2020 in Veneto by 10.3% with the most barley produced in the Padova province. However, barley must be malted to produce beer and the availability of malthouses in Italy remains a bottleneck in the supply chain and goal of a “0 km” supply chain and 100% made in Italy beer. The future could see the creation of micro-malthouses throughout the Veneto region to fulfill the shortage of malt and decrease the national dependence on imported malt, which was at 60% of the national demand as of 2019 (Veneto Agricoltura, 2021).

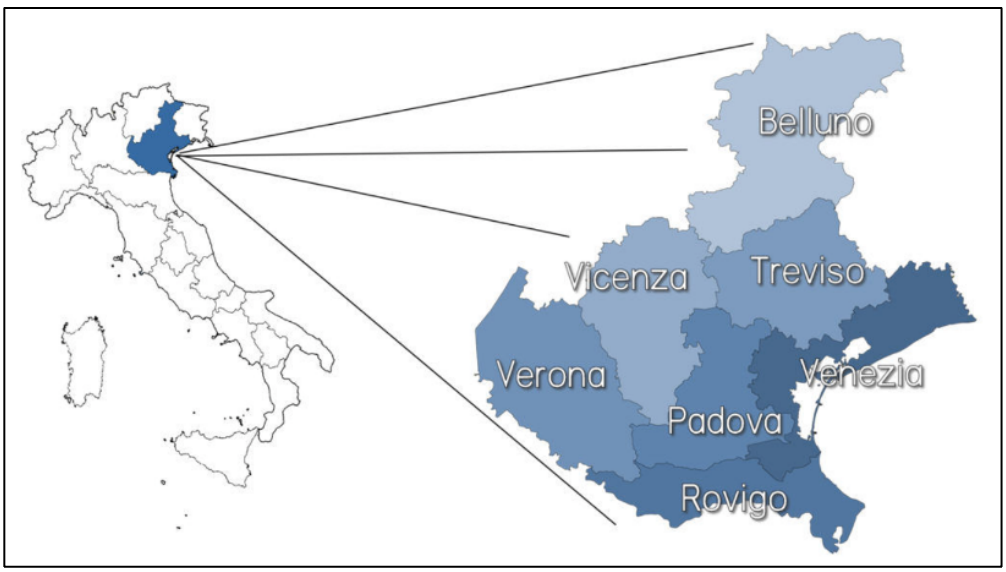
3.3 Vicenza province

3.3.1 General characteristics of the province

By taking a closer look at the province of Vicenza and its tourism sector it is possible to understand the environment which the consumers live in, and the types of activities that are important for the local community. The prospect of craft beer tourism and the PV beer road can be better understood by examining the characteristics of the location where it is being developed.

The province of Vicenza is in the Veneto region of Northern Italy and encompasses 114 municipalities (Province of Vicenza, 2019). It is geographically situated between the Berici Hills in the south, the Lessini Mountains in the west and falls within the Alps to the north. To the west lies Verona and to the east lie Padova and Treviso (see Figure 3.9). The population is at 726,418 as of 2024 with 110,830 of those inhabitants living in the City of Vicenza. It is one of the wealthiest provinces in Italy and the main economic activities of the province are goldsmithing and jewelry production, textiles and agriculture. The agricultural sector is particularly important because it involves the production of vineyards that produce well-known DOC wine regions like Soave and Breganze. Some of the agri-food products from Vicenza are white asparagus from Bassano del Grappa, cheeses from Asiago, rice from Grumolo di Abbadesse, and sopressa from Valli del Pasubio.

Figure 3.9. Location of Vicenza province within Veneto region



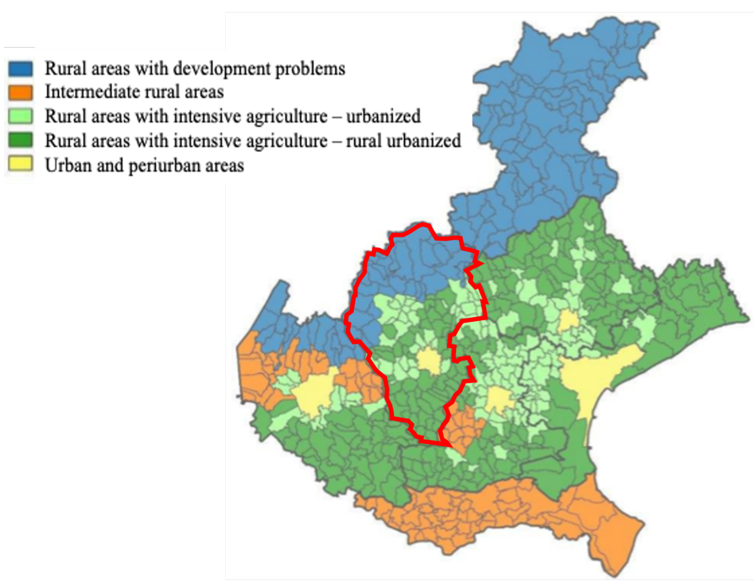
Source: author's elaboration from www.venetoway.com

Renaissance architecture is what the City of Vicenza is best known for (e.g., Andrea Palladio). In terms of the cuisine, it features a mix of Venetian and mountain food with dishes like polenta and bigoli being examples of the traditional food that is always available.

While the province is categorized as intermediate by the Organization for Economic Co-operation and Development (OECD) criteria, a large portion of the province is considered rural.

The OECD defines intermediate areas as those between a mix of urban and rural characteristics having a population density between 150 and 1500 inhabitants per square kilometer (OECD, 2011). Figure 3.10 shows the Veneto region and the province of Vicenza (outlined in red) with classification of towns within the province. Rural areas are typically characterized as having lower population densities and agricultural activities. Many of the comuni, or towns have a population density less than 300 inhabitants per square kilometer and the province as a whole has a population density of 314 inhabitants per square kilometer. There are implications of rural and urban designations such as funding availability from the EU for rural development as well as future policy decisions regarding initiatives for rural interventions. The population of the province is not evenly distributed, approximately 60% of the population resides in the urban centers while 40% reside in the rural areas. Many of the rural areas have agricultural activity but are economically depressed due to lack of employment. As will be discussed in the following sections, this is relevant because most of the PV craft breweries are in located in these rural areas and have the potential to create craft beer tourism offers that could enhance the local economy. Most of the PV beer road breweries are outside the main tourist flow of the City of Vicenza and therefore can benefit from the potential tourism activity from the breweries.

Figure 3.10. Vicenza province rural classifications



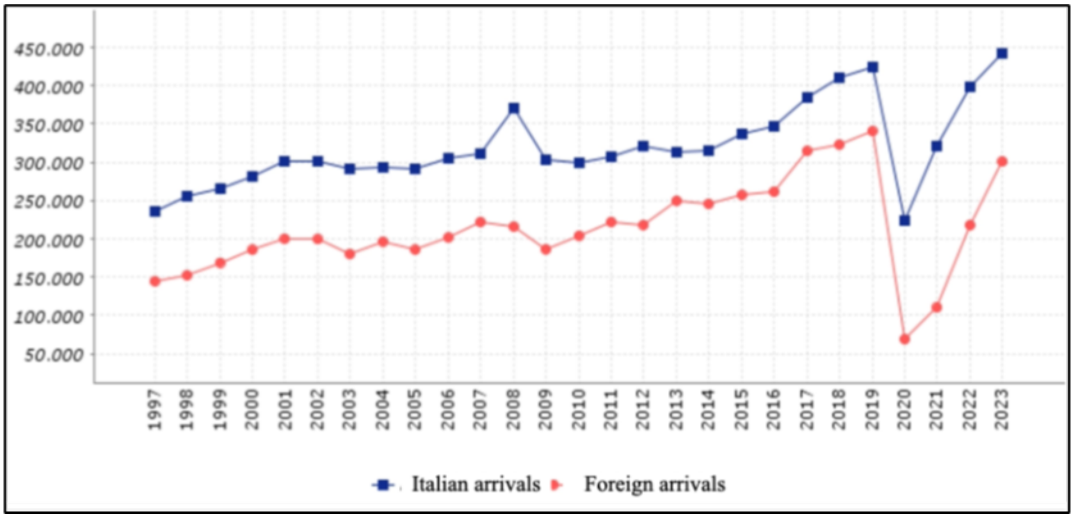
Data: author’s elaboration of data from Region of Veneto (2023)

3.3.2 Vicenza tourism

Vicenza is a province of the Veneto Region that offers a mix of art, history, and nature but the most traditional attractions are food, wine and fashion. These offers have recently been enriched with recreational activities in response to the growing demand for personalized tourist experiences. The tourism sector in the province has varied initiatives, many of which include locally produced food and drink. One such initiative was the creation of Viart.it, an online portal that promotes and organizes events for artisan businesses with a section devoted to craft breweries of Vicenza. There are over 3,000 artisan businesses in the province that support the tourism offer with 17% of them belonging to the agri-food sector. There are many local festivals, also called sagras where food and wine are the main attraction on a regular basis throughout the year. This brings local and regional tourists, and to a lesser degree international tourists. The local communities have an opportunity to promote their food, wine, and beer productions that are linked to the territory. In August of 2024, a British news company The Guardian published an article on Vicenza entitled "Italy's 'antidote to overtourism': exploring unexpected delights in Vicenza and beyond." The response by the local community was mostly of pride and the City of Vicenza's response on Instagram was that "we have one more reason to be proud and to make the most of the enormous heritage we have." The recognition of the city by an international news outlet could result in more international tourists coming to the city in the coming years which would have a positive impact on the craft beer tourism sector.

As indicated in Figure 3.11, since the Covid pandemic, domestic tourists from within Italy visiting Vicenza province have shown to be increasing at a faster rate compared to international tourists. The year 2023 marked a significant recovery for the tourism sector of the province of Vicenza, and there was an overall increase in tourist presence reaching +12.7% compared to the previous year, with a significant increase in visitors from abroad (+22 ,6%). Given the overall recovery, pre-pandemic levels were only partly exceeded, marking an increase in Italian presences (+8.5%) but still lower than 2019 for foreign tourists (-7.2 %). (Veneto Region Statistics: tourist movement, 2023). In the Vicenza area, Italians, who made up around 60% of visitors, increased by 2.3% in number and 7.6% in overnight stays (Region of Veneto, 2023).

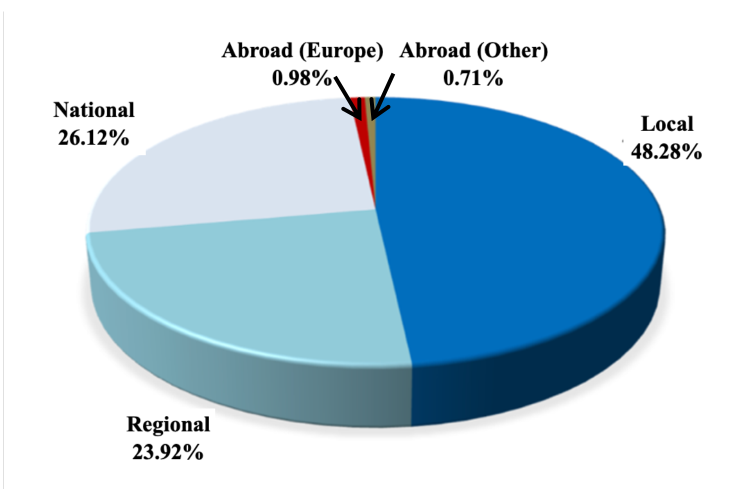
Figure 3.11. Annual tourist arrivals in Vicenza 1997-2023



Source: Region of Veneto (2023)

This recent tourism figures highlight the importance of regional tourism to support the PV beer road, along with the fact that most craft beer producers' geographic destination of their products is local and regional. Figure 3.12 represents the breakdown of Italian craft beer sales by geographic destination with local and regional sales channels at approximately 72% of all sales. (UbObiart, 2023). The trend to keep the craft beer product local reinforces the development of craft beer tourism such as beer roads that utilize existing local resources to create tourism products for both national and foreign visitors.

Figure 3.12. Geographic destination of Italian craft beer sales



Source: author's elaboration of data from UbObiart, 2023

The 2021-27 rural development program (RDP) measures for Veneto highlight rural tourism and overall economic development (EAFRD, 2023). Specifically, some of the priorities of the Veneto Rural Development Complement (CSR) are improving the quality of life in rural areas and encouraging diversification of economic activity. This includes business creation and development and encouragement of tourism activities and would apply to the development of craft beer tourism activities like the PV beer road. Given that approximately 60% of the Vicenza province is considered rural with considerable agricultural land, the measures are applicable to the area and eligible for RDP funding. Although specific information published on gastronomic tourism is difficult to find, it can be observed that food and wine related tourism makes up a portion of the tourism in Vicenza due to the presence of food, wine and beer events that occur on a continual basis. A few examples are Cioccolandia Vi which is a yearly event that occurs in Vicenza and features local chocolatiers, as well as Made in Malga which occurs in the center of Asiago and features mountain products, and finally, ViWine Festival that for 3 days brings many local wine producers together and offers tastings at kiosks in the main city square of Vicenza. In 2024, the festival welcomed around 20,000 visitors according to the City of Vicenza. The city of Vicenza collaborates with other local organizations like Confocommercio Vicenza, Coldiretti Vicenza, and Confartigianato Imprese Vicenza to offer a variety of food-related events to promote the territory.

3.4 The Pedemontana Veneta beer road

The PV beer road data was found by using the destination management organization's (DMO's) website, by visiting the DMO in-person, and printed marketing materials. Breweries within the PV beer road were profiled according to characteristics such as location, date of opening and number of beer styles produced. This information was gathered using secondary sources such as the craft brewery websites, social media accounts of the breweries, and microbirrifici.org which is a website dedicated to documenting craft breweries in Italy.

The PV Beer Road *(Strada dei Birrifici della Pedemontana Veneta)* was created in 2021 by the Pedemontana Veneta and Colli DMO. The official logos for the DMO and the PV beer road shown in Figures 3.13 and 3.14. With funding by the Vicenza Chamber of Commerce and collaboration with the municipalities of Zugliano, Thiene, Isola Vicentina, Coldiretti Vicenza and Ascom Schio and Thiene, the project was launched. In total, 17 craft breweries joined the initiative and gave visitors the opportunity to taste their beer but also see how the product is made from the raw materials during guided tours. The ambitious touristic initiative is the first in the Veneto region that involves craft beer to promote the territory. The PV Beer Road was initiated due to a desire to create a specific tourist offer in response to the growing number of craft beer operators and enthusiasts in the area (OGD Pedemontana Veneta e Colli, 2020).

According to Giorgio Xoccato, the president of the Vicenza chamber of commerce "The Pedemontana Veneta beer road represents an excellent example of tourism development related to the emerging trends in contemporary tourism. This makes the tourist proposal, which winds along the road of the Pedemontana Veneta craft breweries, an innovative and far-reaching project." (Pedemontana Veneta e Colli DMO, 2023). According to the PV and Colli DMO, those emerging trends that the PV beer road support are:

- The valorization of places still far from tourist flows
- The virtuous intertwining of traditions
- Food and wine and protection of the territory
- The ability to involve visitors in real experiential journeys

Figure 3.13. Logo for the Pedemontana Veneta e Colli DMO

Figure 3.14. Logo for the Pedemontana Veneta beer road

Source: Pedemontana Veneta e Colli (2023)

Supporting this initiative, in the recent 2023 report by UbObiart[3], one of the highlighted opportunities mentioned for the craft beer sector was the establishment of craft beer roads. This falls under the craft beer torism umbrella and is recognized as a specific strategy to bring both local and international tourists to Italy and to promote regional products. The PV beer road starts from the municipality of Isola Vicentina and crosses the Vicenza area in a ring, passing through the places where the breweries have their headquarters. It goes as far north as Schio, Val Leogra and Val Posina, through Piovene Rocchette up to Calvene and Zugliano and then through Marostica up to Bassano del Grappa. From Rosà the road descends to Quinto Vicentino and then from Vicenza to the Berici Hills passing through Villaga and Lonigo. The return is through Gambellara, Sovizzo and Trissino. Worth noting is that the oldest craft breweries in the Vicenza province are Birreria Summano and Birreria Vecia both located in Piovena Rocchette. In the late 1800's beer was produced in both locations and they are still open today and are a historical as well as gastronomic attraction. Figure 3.15 shows a map of the PV craft beer road which includes the 17 craft breweries (in orange) two historical breweries (in red) and two pubs that serve local craft beer including from the PV craft breweries (yellow).

Figure 3.15. Map of the Pedemontana Veneta beer road

Source: Pedemontana Veneta e Colli DMO (2023)

[3] UbObiart is a collaboration between Unionbirrai and the Observatory of Artisinal Beer at the University of Florence that studies the market and supply chain of the brewing industry

The geographic locations of each of the craft breweries within the Vicenza and their business typology are shown in Figure 3.16. Many of the PV craft breweries are in rural areas outside of the main tourist flow of the City of Vicenza. Figure 3.17 indicates rural classifications according to Veneto's 2014-2020 PSR of the towns where the PV beer road breweries are located. The recognition of more rural craft breweries is important to identify because of the potential affect that the PV beer road could have on rural tourism in these communities. The valorization of craft breweries in Vicenza can generate important impacts on the area including from an economic, entrepreneurial, and employment perspective. As of 2019, Vicenza had 26 registered microbreweries which is 16% of the total for the Veneto region (Veneto Agricoltura, 2021). The PV beer road includes 17 of these craft breweries and provides a strong representation of craft beer in the province and good level of initial cooperation.

Figure 3.16. Location and business typology of PV beer road breweries

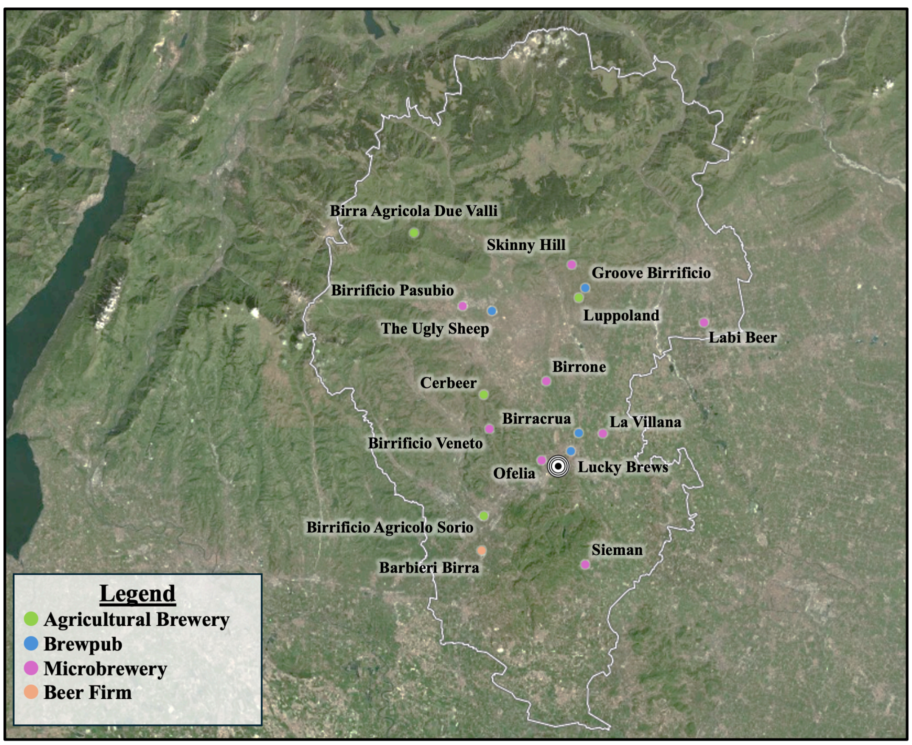
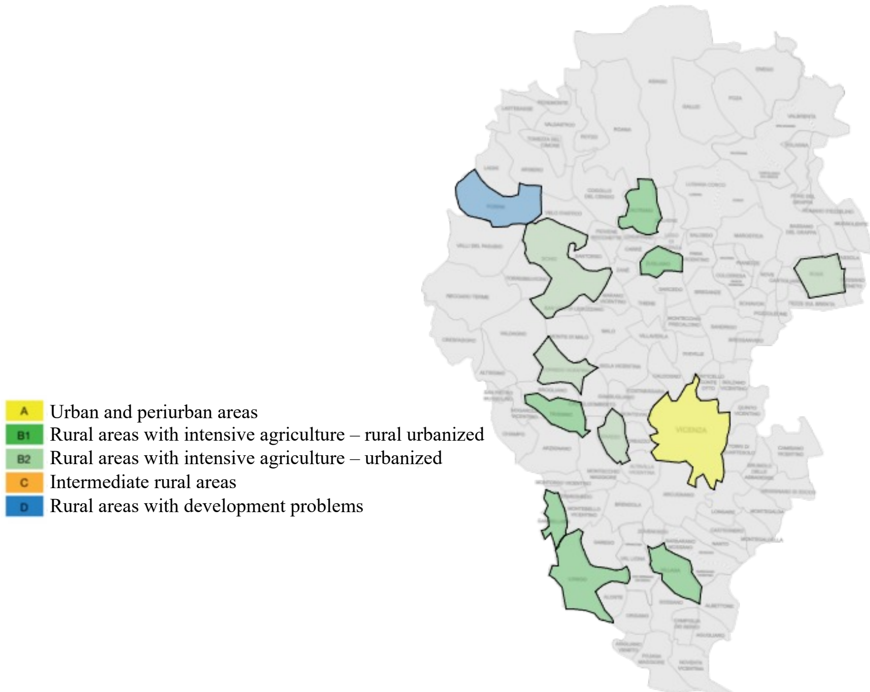


Figure 3.17. Rural classification of Vicenza towns (2014-2020) where PV beer road is located



The 17 breweries have different business structures, with 8 being microbreweries, 4 brewpubs, 4 agricultural breweries, and just one being a beer firm. Because of the rapid development of the craft beer sector, it is possible that at the time of this research the breweries have more amenities in development such as expansion of seating areas, entertainment, tour options, as well as the implementation of growing raw materials on site. For example, the website for Skinny Hill craft brewery states "we are a constantly evolving project, open to facing any future challenge with the aim of enhancing the territory and promoting sociality" (www.skinnyhill.com). In fact, this brewery is in the process of transitioning to an agricultural brewery. Some of the larger breweries have more than one location, for example, Birrone. They are one of the larger producers in terms of annual hectoliters and have a location in Bassano del Grappa and Padova which are not part of the PV beer road.

To better understand the characteristics of each craft brewery on the PV beer road, and inventory of the breweries is shown in Figure 3.18. This matrix can be useful to get an idea of what each of the breweries offers to tourists and can be related to the consumer questionnaire where motivational factors are investigated. For example, the question "*to what degree do the following factors motivate you to visit the PV beer road*?" respondents rated the level of importance on a 1-

5 Likert scale of factors included in the matrix such as "*a large variety of beer styles to try*", "*ability to see live music/entertainment*", and "*the availability of a brewery tour to learn about the production and history.*"

Figure 3.18. Characteristics of the Pedemontana Veneta craft breweries

Name	Location	Business Type	Taproom	Outdoor Seating	Live Entertainment	Tours	Beer Styles	Rural	Opening year
Barbieri	Lonigo	Beer firm					4	x	2020
Birracrua	Vicenza	Brewpub	x	x	x		9		2003
Birrificio Veneto	Trissino	Microbrewery					5	x	2016
Birrone	Isola Vicentina	Microbrewery	x	x	x	x	50	x	2008
CerBeer	Cornedo Vicentino	Agricultural brewery		x			4	x	2014
Groove	Zugliano	Brewpub	x	x	x		8	x	2022
Due Valli	Posina	Agricultural brewery					5	x	2015
Labi	Rosà	Microbrewery					10	x	2014
La Villana	Vicenza	Microbrewery				x	16		2017
Lucky Brews	Vicenza	Brewpub	x	x	x		17		2012
Luppoland	Zugliano	Agricultural brewery	x	x			11	x	2008
Ofelia	Sovizzo	Microbrewery	x	x	x	x	12	x	2011
Pasubio	Torrebelvicino	Microbrewery					4	x	2015
Siemàn	Villaga	Microbrewery					10	x	2017
Skinny Hill	Calvene	Craft brewery	x			x	15	x	2021
Sorio	Gambellara	Agricultural brewery				x	6	x	2021
The Ugly Sheep	Schio	Brewpub			x		9	x	2019

While there was a strong initial marketing campaign for the PV beer road by the Pedemontana Veneta e Colli DMO in 2021, it is difficult to find recent information on the beer road. The main marketing channel for the PV territory appears to be online through social media accounts and websites of the Visit Pedemontana organization (visit.pedemontana.it). Here, itineraries for the area are highlighted which are focused on cultural and outdoor activities. However, information for the PV beer road itself is absent. By taking a closer look at the individual social media accounts of the PV craft breweries, it becomes obvious that the breweries are involved in many local festivals centered around music, food, beer and even wine. For example, in September 2024, three breweries (Skinny Hill, Due Valli, and Pasubio) on the PV road collaborated to create an event called *Birelando*. It was the second year of the event and featured 3 days of live music, mountain food, and craft beer and was located approximately 22 miles north of the Vicenza city center. According to Marco Zorzi of *L'Eco Vicentino* online publication, "more than a beer festival, it is a real celebration to kick off Laghi, the smallest town in the Veneto region (Zorzi, 2023). The program for the event is dedicated to the blonde and sparkling drink loved all over the world and the opening of the breweries which have joined the event." These breweries are geographically located further north on the PV beer road and are more isolated than some of the others which form more of a district in relation to proximity to each other. This collaboration was one that made sense given the characteristics of these craft breweries. In other words, there appears to be a type of segmentation occurring within the PV craft breweries because not all the breweries face the same realities of geographic location, stage of business development, marketing resources and staff.

The PV beer road as part of a craft beer tourism offer is informal at this stage of development, and the proposed itinerary is self-guided. With more planning and development of the network surrounding the craft beer road, it could become more formal (more signage and arranged transportation, for example) if that is what the stakeholders involved wanted. The takeaway is that the PV breweries are involved in promoting their craft bee, just not specifically within the craft beer tourism offer of the PV beer road. There is a good opportunity to enhance the promotion of the PV beer road which will be described in more detail in the discussion section of the thesis.

3.5 Methodology

3.5.1 Consumer questionnaire

A mixed method approach was taken to answer the research questions for this exploratory research which utilized a quantitative consumer questionnaire and a qualitative review of craft beer industry reports. The research questions focused on finding out who the craft beer road consumer in Italy is, their motivations to visit a craft beer road, and exploring the challenges and opportunities of developing a craft beer road. Due to the constraints of the study including time and financial resources, the questionnaire focuses on the consumer perspective while recognizing that other stakeholders exist within the craft beer tourism sector such as residents, distributors, brewery owners, tourism operators and suppliers. Like other tourism research has done, focusing on one stakeholder is appropriate (Marshall et al., 2010; Presenza & Cipollina, 2010). While the consumer questionnaire addresses the first research question, the second (opportunities and challenges) was further supported by an analysis of craft beer industry reports such as those published by Assobirra[4], UbObiart, and Veneto Agricoltura.[5]

3.5.2 Procedure, design and data analysis

An online questionnaire was administered to individuals from May 2 through June 30, 2024. The target sample of the questionnaire were those living in the Vicenza province. The Vicenza province was chosen because the context of the research was Italy, specifically investigates the PV beer road located in the Vicenza province. The questionnaire was shared from the author's social messaging platform WhatsApp, as well as through email using an anonymous link. A poster with a QR code was also distributed in Vicenza and at the University of Padova to collect more participants (see appendices for poster and questionnaire). The aim was to collect data from as wide of a range of individuals as possible, but with the target sample being those that were currently living in the Vicenza province.

The 22-question survey was created using Qualtrics software and delivered in an online format. The questions were created in English and then translated also to Italian so that respondents could choose either language to complete the questionnaire. Only closed answer questions were used and resulted in either nominal or ordinal data. The question response options were categorical using a 5-point Likert scale to measure subjective attitudes and preference, yes or no, or multiple choice with one possible answer. The two different 1-5 Likert scales were where 1= strongly disagree, 2=disagree, 3=undecided, 4=agree and 5= trongly agree and where 1=not important, 2=slightly important, 3=moderately important, 4=important and 5=very important. Within the questionnaire design, the respondents were able to skip questions which accounts for the variance in response rates for each question. The first portion of the survey provided some definitions that would be used in the survey to ensure a baseline understanding of the questions by participants. These included "craft beer", "craft beer road" and "Pedemontana Veneta beer road" which listed the 17 craft breweries involved.

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[4] Assobirra is the Association of Brewers and Malters that represents the Italian beer supply chain and brings together the main companies that produce and market beer and malt in Italy.
[5] Veneto Agricoltura is an agency in Veneto Region of Italy that supports innovation in the primary sector and carries out support activities for the Regional Council related to agricultural, agri-food, forestry, and fishing sectors.

The questionnaire consisted of the following 5 sections:

- Experience and intentions
- Preferences
- Knowledge of the Pedemontana Veneta beer road
- Motivations to visit a craft beer road
- Socio-demographics

Within the direct experience portion of the questionnaire, respondents were asked if they drink beer, drink craft beer in particular, and whether they have ever visited a craft beer road. The follow-up question was whether they intent to visit a craft beer road. These questions aimed to reveal how many craft beer drinkers there were, and who planned to visit a craft beer road such as the PV beer road, regardless of them being beer drinkers or not. There was a focus on question 4 "*do you intend to visit a craft beer road?*" for the analysis because those who answered "yes" were considered the craft beer road consumer and better addresses the first research question.

The preferences section corresponds to Plog's tourist psychographic model, which will be used to attempt to identify a correlation between the overall sample, those intending to visit a craft beer road and psychographic type. In this section, Plog's (1995) 4 item scale was used to determine the level of adherence to personality type along the allocentric/psychocentric spectrum. Some of these included the statements "*I can make decisions quick and easily*" and "*I have more energy than most people my age*." These were in addition to a shortened version of the other measurement questions that were taken from studies that successfully correlated the Plog psychographic type with travel behavior and/or intentions (Griffith & Albanese, 1996, Nickerson & Ellis, 1991) and measured vacation type preference. These include "*How likely is it that you would take the following type of vacation?* These questions aimed to show a relationship between personality, travel preferences and/or likelihood to visit a craft beer road.

In the motivations section, questions were asked that related to features of a craft beer road that would increase the likelihood that a consumer would visit. For the PV beer road used in this study, this section aimed to identify features of the craft beer road that are more important to potential visitors. The questions were created by the author's own experience of what local craft breweries in Italy and the United States offer. Some of these questions involved live entertainment, a large variety of beer styles, and the availability of a brewery tour. The question "*In regard to a craft brewery road, how important are the following aspects when deciding to visit a craft brewery?*" had answer options that were formulated based on Kraftchick's (2014) study on brewery visitor motivations in the United States that revealed four main motivational factors for craft beer tourists to visit a craft brewery.

The Socio-demographics portion included typical demographic questions about age, gender, employment status, and household income but also asked about where respondents live (Italian region or international) and whether it was in a rural or urban area. This was done to assess how many craft beer consumers were local within Vicenza province and if there is a relationship between craft beer road consumers and rural or urban residency. Some of the socio-demographic responses were used to find relationships with dependent variables such as intention to visit and motivational factors.

The data provided by the questionnaire was statistically analyzed by using Qualtrics software. Descriptive statistics were done on the variables using a Likert scale by coding 1-5 intervals resulting in a mean and median score for each category of responses. The main statistical tests that were conducted were chi square test (to compare two categorical variables) and Fisher's exact test to find relationships between variables that used the Likert scale categorical data. The t-test was also used to find relationships between categorical and numerical variables (for example yes/no and Likert scale). For the section on preferences, a cluster analysis (CA) was performed and attempted to create groups with similar responses to the 16 statements based on Plog's psychographic scale. CA allows you to divide several objectives into groups that are homogeneous (or similar) based on the variables used for their description (Dolnicar, 2003) and helps to sketch different consumers' profiles.

One of the research aims was to find who the craft beer road consumer is, and using Plog's (1974) psychographic typology was one approach to defining the consumer. An analysis of responses sought to find associations with either allocentric or psychocentric typology. CA is widely used in consumer studies and marketing analysis (Dolnicar, 2002) and has been recently used also for analyzing the Spanish beer market (Calvo-Porral et al., 2018). For clustering the sample, 16 variables were chosen which were the questions measuring Plog's psychographic type and correspond to the following topics: habits, vacation preference, travel motivations, and personality traits. The hierarchical (agglomerative) technique was used to explore the presence of "natural groups" within the sample. Once the clusters were defined, it was possible to further investigate the characteristics of respondents in each cluster such as intent to visit a craft beer road, age, and gender.

Chapter 4. Results and discussion

To define the consumer profile, responses regarding their intent to visit a craft beer road were analyzed, along with demographic data, travel preferences, and personality traits. This analysis utilized both closed-ended questions and Likert scale responses. Consumer motivations were identified using Likert scale questions focusing on the general characteristics of craft beer roads, the PV craft beer road, and travel preferences. Challenges and opportunities were partially addressed through responses about knowledge of the PV craft beer road and by questions about specific features of craft beer roads.

Following an initial overview of the questionnaire respondents, a selection of questions and results are then presented according to the different sections. These are: direct experience and intentions, preferences, motivations, knowledge of the PV craft beer road, and socio-demographic details. While the entire sample was analyzed for some questions, particular focus was given to respondents who answered "yes" to question 4, "*Do you intend to visit a craft beer road?"* as they represent the potential craft beer road consumer and are the focus of this investigation. The results are followed by opportunities and challenges to craft beer road development identified in the consumer questionnaire and craft beer industry reports. The discussion connects these findings to previous research and offers recommendations for the future development of craft beer roads as a part of gastrotourism in regional tourism.

4.1 Overview of questionnaire results

The total number of respondents (n) to the survey was 155 and had age ranges from 18-65 years. Participants were able to skip questions within the questionnaire software, so although 155 participants initiated the questionnaire, not all completed it, resulting in some questions with fewer responses. A total of 29 questions were left unanswered and were disqualified from the analysis.

In total, 44 men, 92 women and 1 non-binary person participated in the questionnaire and a final person preferred not to answer the gender question. The most prevalent age range was 36-45 (43%) years followed by 45-55 (32%). Those with a college degree (76%), working full-time (70%), living in urban areas (77%), and satisfied with household income (43%) were most represented. A majority (69%) live in the Vicenza province where the questionnaire was administered. Table 4.1 summarizes the socio-demographic data of the participants. A more detailed description of the socio-demographic variables is given in the next section. Based on the questionnaire results, the craft beer road consumer is demographically similar to the whole sample. They are between 36-45 years old, satisfied with household income, working full-time, are college educated and live in an urban community. Both men and women were equally likely to be a type of craft beer road consumer.

Table 4.1. Socio-demographic characteristics of all respondents

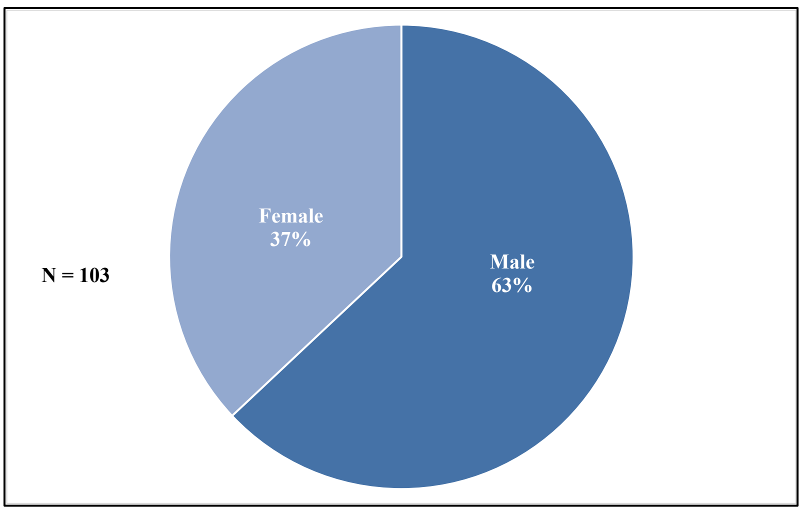
Variable	N	Percentage
Gender	138	
Male	44	32
Female	92	67
Non-Binary/Third Gender	1	1
Prefer not to say	1	1
Age	138	
18-25	9	7
26-35	22	16
36-45	59	43
46-55	44	32
56-65	4	3
65+	0	0
What is your level of education?	138	
High school	10	7
Technical or vocational school	23	17
College graduate	58	42
Post-graduate	47	34
What is your employment status?	138	
Student	17	12
Part-time employment	19	14
Full-time employment	97	70
Homemaker	4	3
Unemployed	1	1
Retired	0	0
What sector do you work in?	128	
Healthcare	15	12
Education	14	11
Retail	0	0
Manufacturing	14	11
Finance	2	2
Agriculture	3	2
Information technology	8	6
Food services	9	7
Military	12	9
Tourism/leisure	**5**	4
Wellness/aesthetics	2	2
Other sector	44	34
How would you describe your household income?	137	
Dissatisfied with household income	10	7
Somewhat dissatisfied with household income	14	10
Somewhat satisfied with household income	54	39
Satisfied with household income	59	43
Do you live in a rural or urban community?	138	
Rural	32	23
Urban	106	77
Where do you live?	138	
Vicenza province	95	69
Other province in Veneto region	33	24
Other region in Italy	7	5
Country other than Italy	3	2

4.2 Results

4.2.1 Socio-demographics

The questionnaire respondents were mostly from the Vicenza province (69%), so this inquiry was useful to understand the potential craft beer consumer in the context of the PV craft beer road. Most of the respondents (60%) were from urban areas, while 40% were from rural areas. Though there were more women in the sample, a larger proportion of men were craft beer drinkers (86%) versus 70% of women with respect to the total of respondents in each gender category. The total percentage of craft beer drinkers by gender of the sample (n=103) is shown in Figure 4.1. The socio-demographics results of the questionnaire support the craft beer consumer profile of previous studies except for the gender variable.

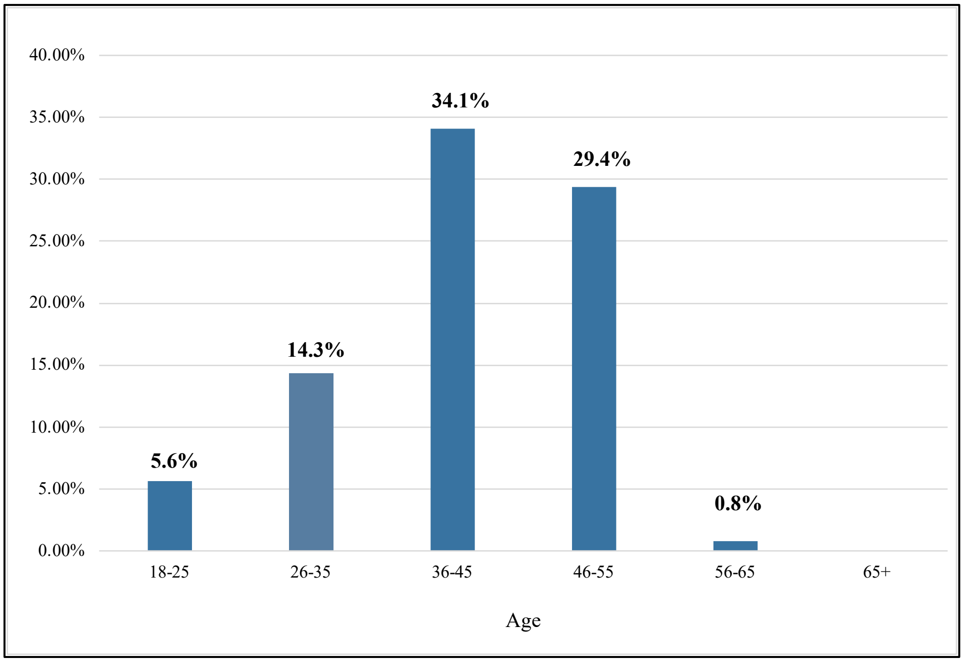
Figure 4.1. Craft beer drinkers by gender



The takeaway is that although more men drink craft beer which is like the consumer profile of previous studies (Carbone & Quici, 2020, Aquilani, 2015) the craft beer road consumer (those intending to visit) has no correlation with gender for this study. The results support a recent survey of 700 Italian craft beer consumers which indicated that craft beer consumption is on the rise for the young and females (UbObiart, 2023).

Figure 4.2 shows that of those intending to visit a craft beer road, most were in the 36–45-year-old range (43%) followed by 46-55 years (32%). This reveals that the potential craft beer road consumer's age is generally in agreement past research on the age of craft beer consumers (UbObiart 2023; Stone, 2020; Kraftchick 2014).

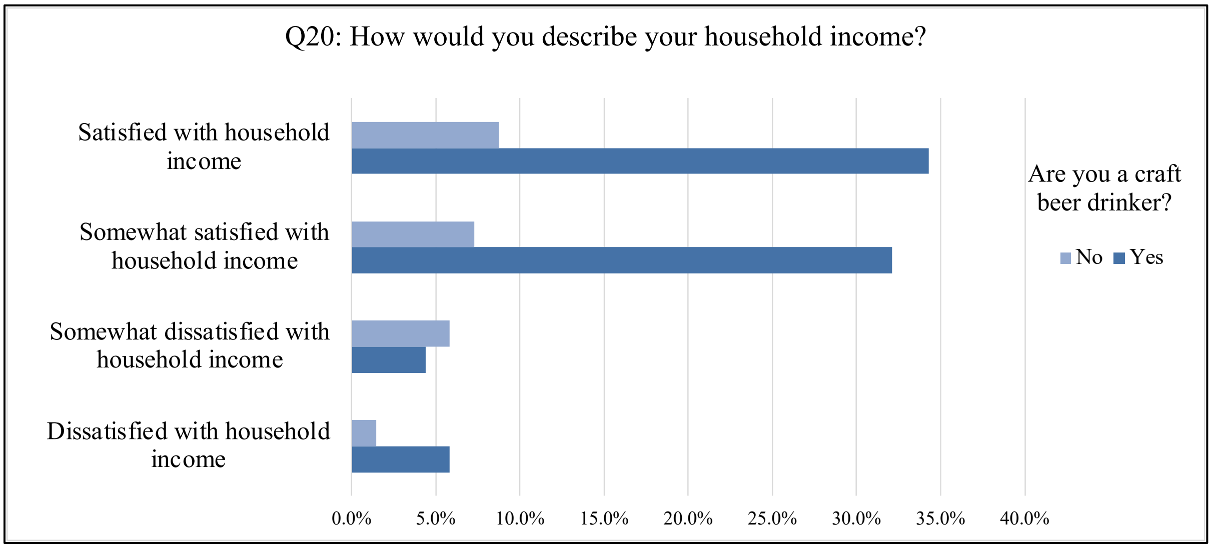
Figure 4.2. Relationship between intention to visit and age (n=126)



To investigate the household income of craft beer drinkers, Figure 4.3 shows the relationship between household income responses and craft beer drinkers.

By comparing the two variables which are craft beer drinkers and household income, the results show that 66% of respondents are either "somewhat satisfied" or "satisfied" with household income. Based on a chi-squared test for (n=137), the p value was 0.0186 showing similarity between the two groups, and that household income is related to craft beer consumption. It was found that those who identified as being "somewhat" or "completely" satisfied with household income were more likely to be craft beer drinkers. From this the assumption can be made that these respondents are also in the mid to high income levels. This also confirms previous studies (Barajas et al., 2017) that those with mid to high income are more likely to be craft beer drinkers. This trend would make sense because of the price premium that craft beer has compared to industrial beer and those with a higher income would have more to spend on this type of beer.

Figure 4.3. Craft beer drinkers versus non-craft beer drinkers and household income



Those who intend to visit a craft beer road responded (84%) that they are either "somewhat satisfied" or "satisfied" with their household income. Interestingly, the satisfaction with household income is higher for those intending to visit a craft beer road is higher than craft beer drinkers as shown in Figure 4.4.

Figure 4.4. Relationship between household income and intention to visit a craft beer road

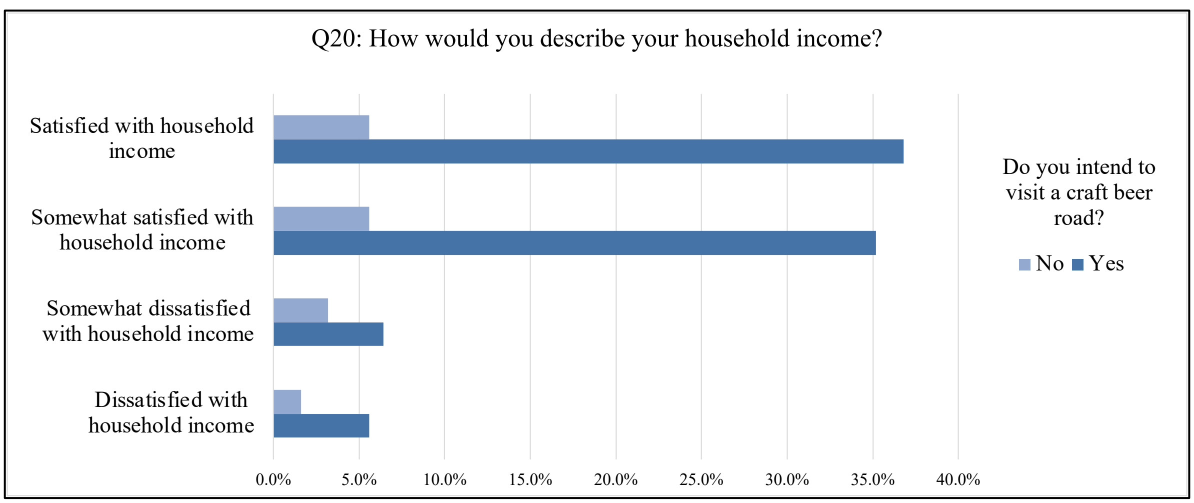
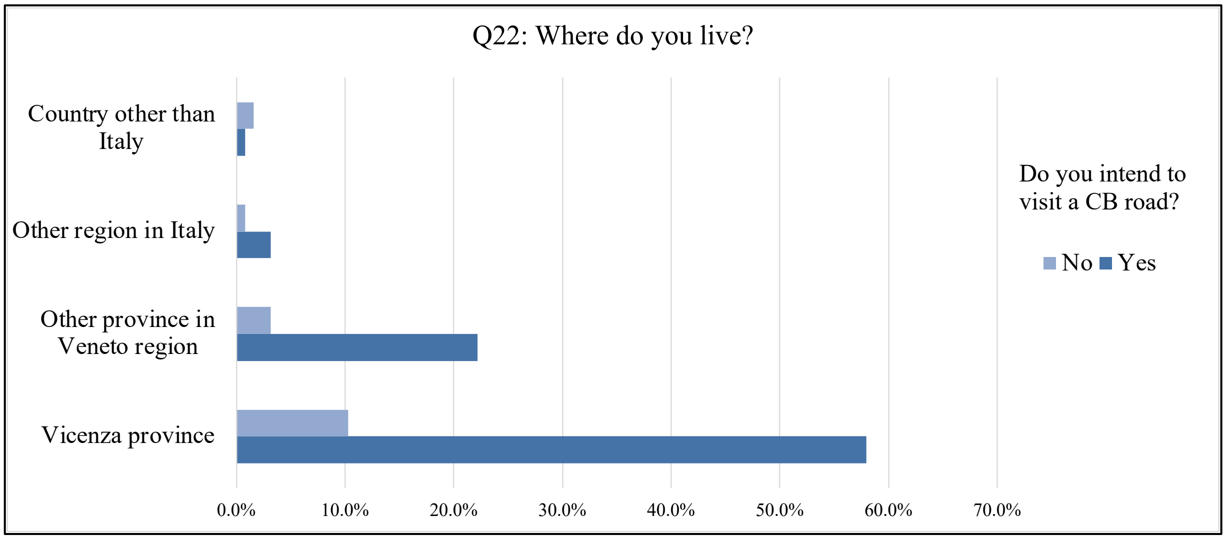


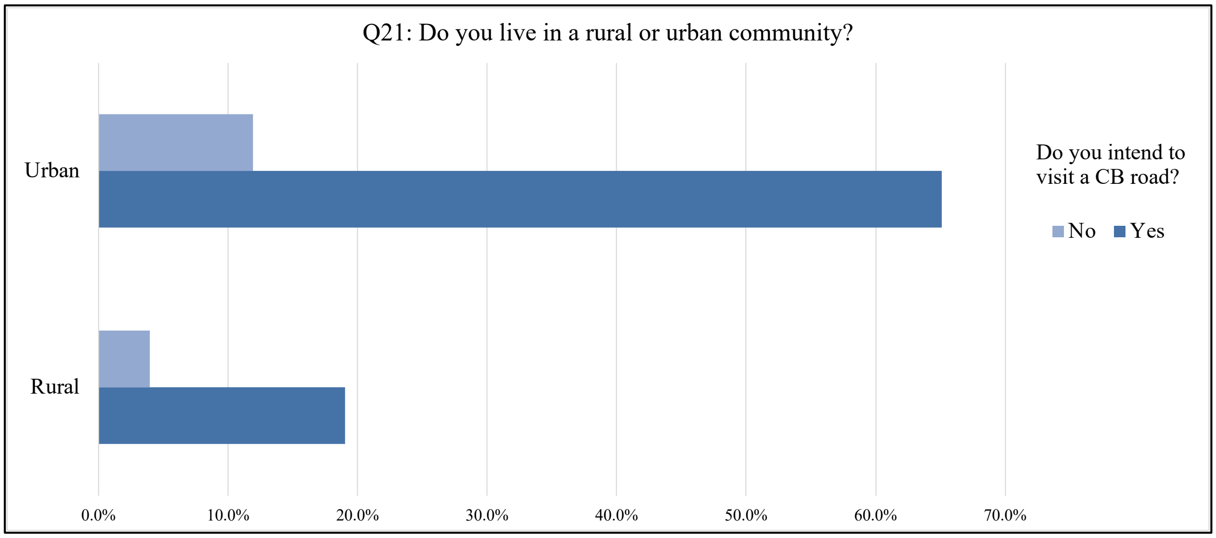
Figure 4.5 shows where respondents live in relation to their intention to visit a craft beer road. Because a majority of those intending to visit live in the Vicenza province where the survey was administered, marketing of the PV beer road could prioritize local tourists and encourage repeat business to build brand loyalty for the breweries.

Figure 4.5. Relationship between place of residence and intention to visit a craft beer road



Urban residents made up most of the respondents intending to visit a craft beer road which makes sense given that 60% of the sample live in an urban area. However, connectivity between urban and rural areas would be important if potential tourists want to travel to craft breweries in rural areas which represent 82% of those on the PV beer road. This could take the form of arranged transportation by tour companies or clear advertising of public transit routes available. This would better encourage tourists to visit the breweries in rural communities.

Figure 4.6 Relationship between urban/rural residency and intention to visit a craft beer road



4.2.2 Direct experience and intention

In the direct experience and intention section, a total of three questions were interpreted. The objective of this section was to gain an understanding of the respondents' habits and familiarity with craft beer and craft beer roads and gauge the interest level in visiting a craft beer road. These dependent variables can be related to independent variables (demographics, for example) to see if there is any correlation to better understand the potential consumer of craft beer roads. Results show that 75% of respondents indicated they are craft beer drinkers and that 15% had already visited a craft beer road. Of those that had not previously visited a craft beer road, 83% intended to visit.

Since only 15% of respondents had previously visited a craft beer road, the familiarity with this type of gastronomic tourist activity is low. Previous research indicates that wine routes are well established, known to tourists and support experiential tourism (Ingrassia et al., 2022). Meanwhile, research on consumers awareness of craft beer roads in Italy is scant. It can be assessed due to the low number of craft beer roads in Italy that craft beer roads are in the early stages of development as a regional tourism product and do not yet have the infrastructure or promotional channels that wine has.

As a follow-up to question 3 (*have you ever visited a craft beer road?),* question 4 asks about intention to visit one. Out of the 83% of those intending to visit, 50% were male and 50% were female. Even though more men responded they are craft beer drinkers (86%) versus women (70%) the gender variable seemed to have no effect on intent to visit a craft beer road. The lack of a statistically significant relationship between gender and intention to visit variables were confirmed by a p value of 0.944 using a chi-squared test with a 95% confidence level.

Based on the sample, there is a high level of interest by those living in Vicenza province to visit a craft beer road and there is an opportunity to develop craft beer tourism offers such as the PV beer road. Most respondents intend to visit a craft beer road, and this invites the exploration of other aspects about the craft beer road consumer such as Plog's (1974) psychographic typology and consumer motivations.

A cross-tabulation table was done in Figure 4.2 to attempt find a relationship between those who intend to visit a craft beer road (the consumer) with those who drink craft beer. Table 4.2 shows percentages of those answering "yes" versus "no" for the two different categories for question 4.

Table 4.2. Relationship of craft beer consumption and intention to visit a craft beer road

		Q2: Are you a craft beer drinker?		
		Total	Yes	No
Q4: Do you intend to visit a craft beer road?	Total Count	139.0	102.0	37.0
	Yes	116.0	90.0	26.0
		83.5%	88.2%	70.3%
	No	23.0	12.0	11.0
		16.5%	11.8%	29.7%

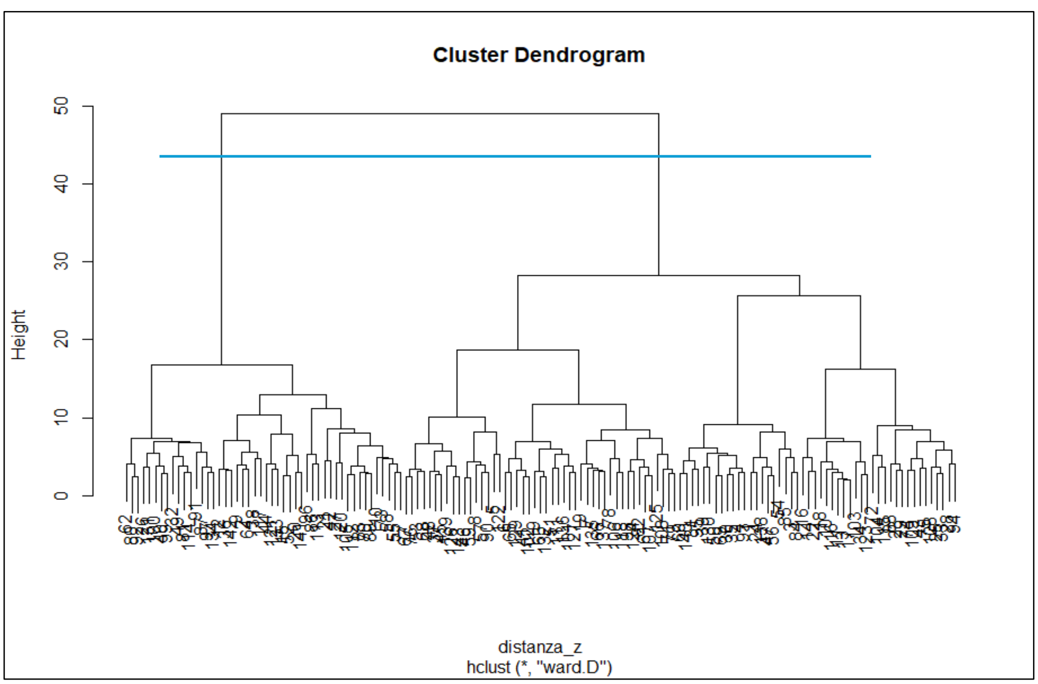
Although some respondents were not craft beer drinkers, 70.3% of them still intended to visit craft beer roads as indicated. This reveals that there are motivations related to factors other than craft beer consumption and that not all craft beer tourists are craft beer drinkers (discussed in motivations section to follow).

4.2.3 Preferences

Discovering a profile of the Italian craft beer road consumer was one of the main objectives of this thesis research. Based on Plog's tourist psychographic model, there are different psychographic types that tend towards allocentric (preferring less known destinations) or psychocentric (preferring well-known destinations). The 16 statements revolved around variables such as personality traits, habits, and travel preferences. By performing the CA, two main groups (clusters) were identified which were the psychocentric and allocentric psychographic types.

The hierarchical dendrogram in Figure 4.7 indicates that two larger clusters, or groups can be identified. The two clusters were determined by the height of the cut (blue line). The number of clusters were decided based on the aim to find consumer segments, eventually distinguishing between allocentric and psychocentric. The x axis indicates all of the observations (n =143) while the y axis indicates the distance between observations. The greater the distance of the vertical lines, the more dissimilar the clusters are. This approach allows for grouping together similar responses to the 16 statements based on Plog's tourist typology to create distinguishable consumer segments.

Figure 4.7. Hierarchical dendrogram for 16 statements based on Plog's psychographic model



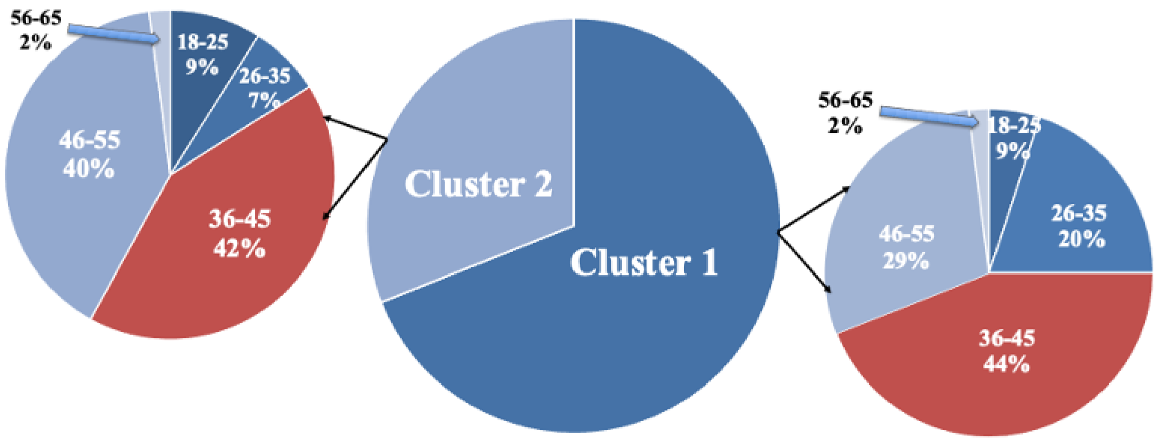
Results of the CA in Figure 4.8 indicate the main differences between the two selected clusters, in terms of all the variables admitted in the analysis. From here, clusters were identified from mean scores associated with either allocentricity or psychocentricity. Cluster 1 shows mean Likert scores to the 16 statements (variables) that are consistent with Plog's allocentric typology. They represent 96 responses, or 67.1% of the sample. For example, the travel motivation statement 'to try out new food and drink that I have not had before' and the vacation preference statement 'I prefer novel, non-touristy locations' had mean scores of 4.08 and 3.91 indicating "agree". Conversely, cluster 2 shows scores more associated with psychocentric types. They represent 47 responses, or 32.8% of the sample. The mean score of the travel motivation statement 'to try out new food and drink' was 2.49 indicating a "somewhat" agree while the mean score of 'I prefer novel, non-touristy locations' was 2.71 indicating "somewhat" agree.

Figure 4.8. Cluster analysis for 16 statements based on Plog's psychographic model (n=143)

Cluster	Prefer.places.mostly.undiscovered	Quick.easy.decisions	More.energy.than.people.my.age	Exercise.program	Type.vacation_novel.non-touristy.location	Type.vacation_place.familia.hotels.shops	Factors.motivating_new.food.drink	Factors.motivating_well.established.tourism.industry	Factors.motivating_experience.local.community	Factors.motivating_visit.in.short.amount.time	Personality.traits_curious	Personality.traits_cautious	Personality.traits_new.experiences	Personality.traits_repeat.experiences	Personality.traits_try.new.products	Personality.traits_products.familiar.with	Number of observatoins
#1	**3.84**	**3.68**	**3.45**	2.77	**3.91**	2.11	**4.08**	2.27	**4.31**	**3.58**	**4.60**	3.34	**4.36**	2.75	**4.33**	2.93	96
#2	3.45	3.55	3.19	**2.91**	2.74	**2.40**	2.49	**2.55**	3.26	3.38	4.30	**3.72**	3.74	**3.51**	3.40	**3.62**	47

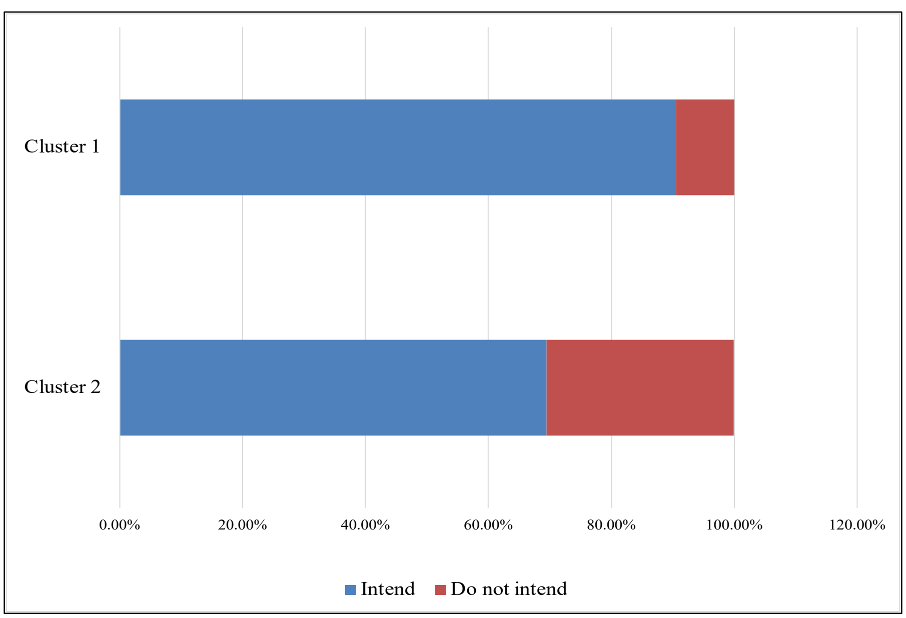
Figure 4.9 shows age breakdown by cluster. The most represented age group for cluster 1 (allocentrics) was 36-45 years (44%) followed by 46-55 years (29%). However, the percentage of 26-35 years is the highest (86%) when looking at the frequency within their age group. For cluster 2 (psychocentrics), the most represented age group was also 36-45 years (42%) followed by 46-55 years (40%).

Figure 4.9. Age frequencies by cluster (n=137)



In Figure 4.10, those intending to visit (craft beer road consumer) are shown according to their representation in each cluster. Cluster 1 (allocentrics) had 91% of respondents that are considered the craft beer consumer whereas cluster 2 (psychocentrics) had 70% of respondents as a craft beer road consumer. Overall, the sample has a high percentage of potential craft beer road consumers (83%) but further segmenting by cluster shows a group within the larger sample that are allocentric tourist types and are more likely to be a craft beer road consumer than psychocentric types.

Figure 4.10. Intention to visit a craft beer road by cluster (n=127)



The following results (Figures 4.11 – 4.14 and Tables 4.3 – 4.5) represent associations with psychographic type based on statement responses using 1-5 Likert scores where 1 = strong agree or extremely and 5 = strongly disagree or not at all.

For the statements in Figure 4.11 on personality traits, the Likert scores given to the statements tended to be associated with allocentric personality types. This was determined by the association of Likert scores to each statement that was measuring allocentricity or psychocentricity. For example, the statement ‘I am curious’ (allocentric trait) had a Likert score of 5, or “strongly agree” by 55% of respondents versus ‘I am cautious’ (psychocentric trait) was scored “strongly agree” only by only 12% of respondents. Likewise, the statement ‘I seek out new experiences’ (allocentric trait) scored “strongly agree” by 39% of respondents versus ‘I prefer to have repeat experiences’ (psychocentric trait) scored “strongly agree” by 5% of respondents.

Figure 4.11. Personality traits frequency (n=143)

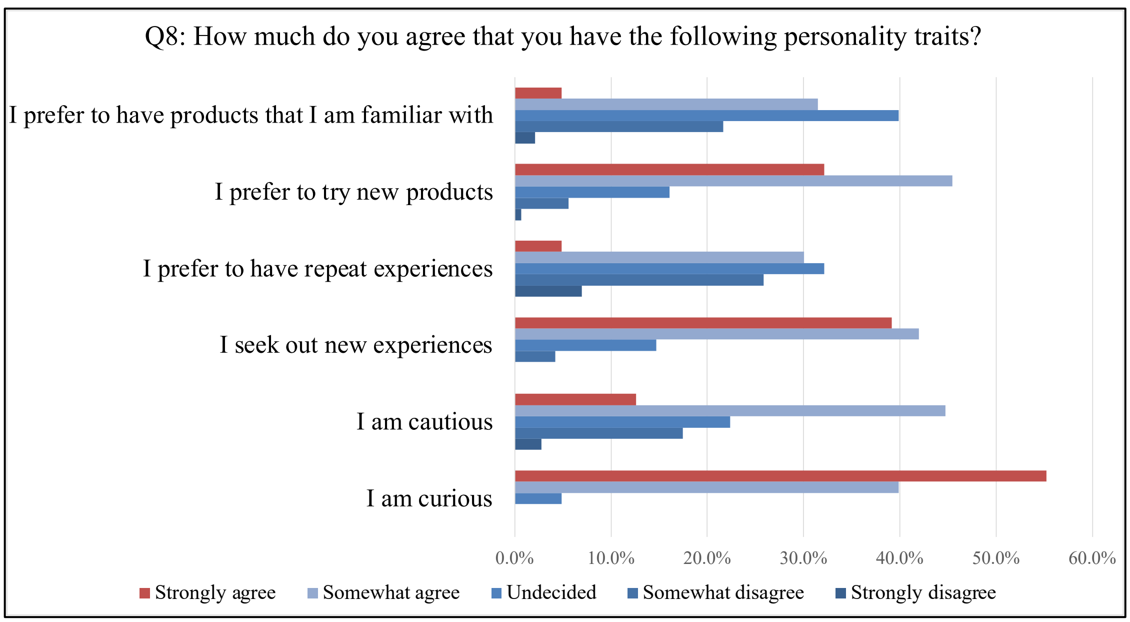
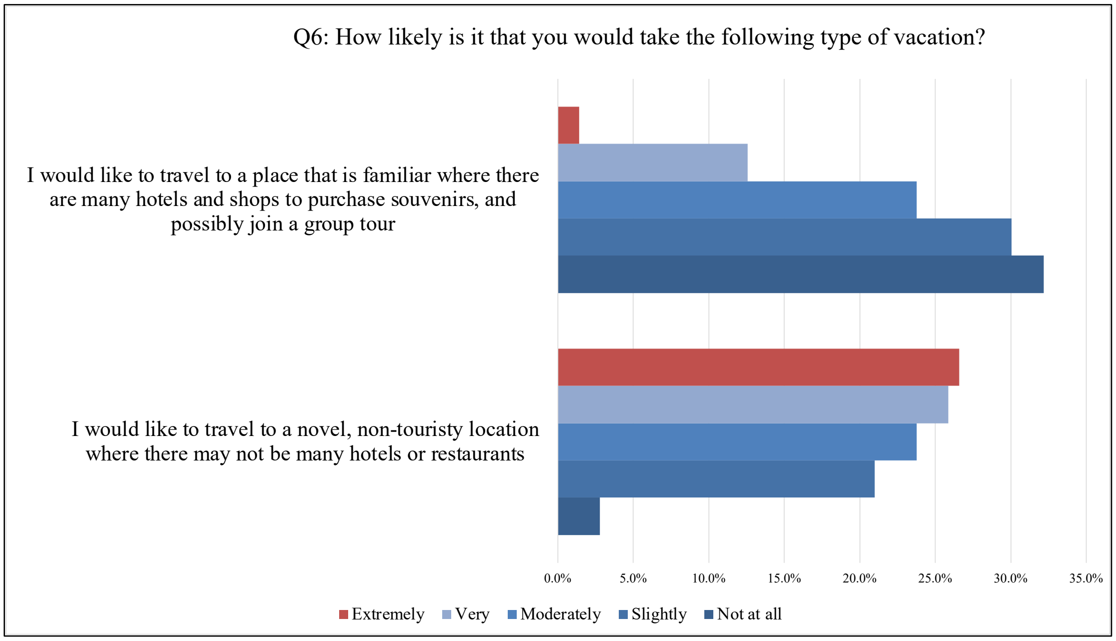


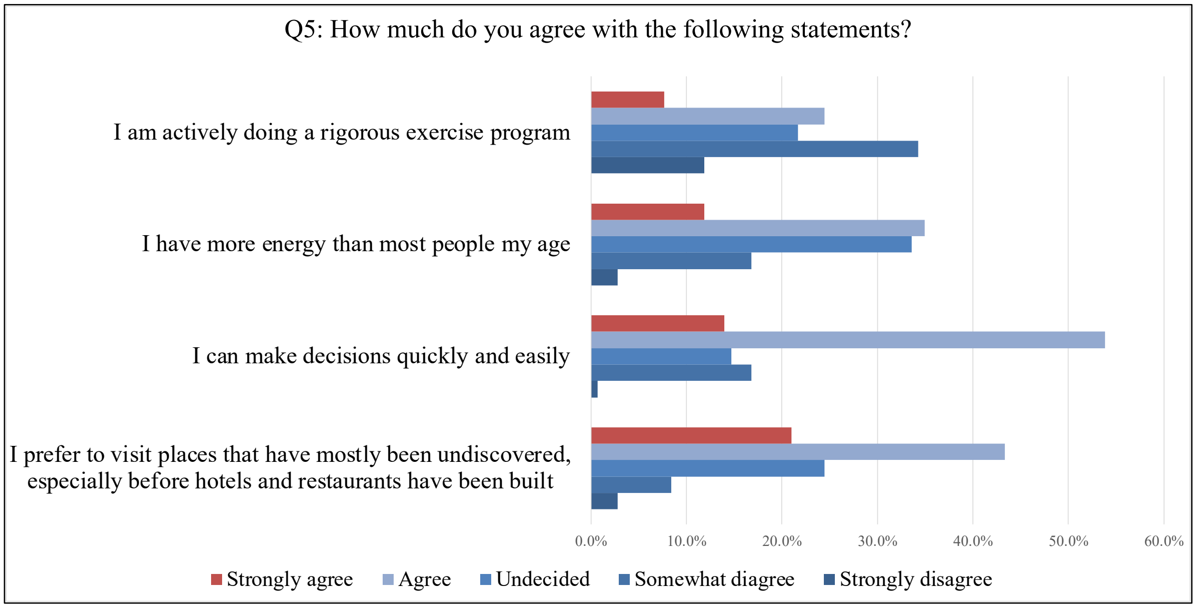
Figure 4.12. Vacation preference frequency (n=143)



For the two vacation preference statements, overall respondents prefer 'novel, non-touristy locations' (allocentric statement) and had an "extremely" important Likert score by 26% of the respondents. Meanwhile, those preferring 'a place that is familiar with many shops and hotels' (psychocentric) was 1% of respondents with "extremely" rating.

For the 8 statements on habits, personality traits, and travel preferences, results were analyzed to find possible associations to allocentric and psychocentric typologies.

Figure 4.13. Habits and personality traits frequency (n=143)



Responses to the statement 'I prefer to visit places that have been mostly undiscovered…' (allocentric) had the highest number of "strongly agree" or "agree" Likert scores at 64%. The mean Likert score for this statement was 3.71 indicating general agreement by the respondents, and therefore, association with allocentric types. Likewise, the statement 'I can make decisions quickly and easily' (allocentric) was rated as "strongly agree" or "agree" by 68% of respondents. However, the statement 'I am actively doing a rigorous exercise program' and 'I have more energy then most people my age' had responses equally associated with both typologies. Overall, responses of these 4 questions were mid-centric due to the even distribution of both psychocentric and allocentric Likert scores.

As shown in Table 4.3, by segmenting those who also answered "yes" to question 4 "If no, do you intend on visiting?" 70% of respondents chose 'I prefer to visit places that have been mostly undiscovered…' (allocentric) as "agree" or "strongly agree." In contrast, those who answered "no" to question 4 answered "agree" or "strongly agree" 47.6% of the time to the same statement. A t test with a p value of 0.0226 was the result of relating the variables of those who intend to visit a craft beer road and this preference to visit undiscovered places. The implicationis that craft beer road consumers are showing allocentric typology tendency which can be used in targeted marketing by craft beer tourism developers such as DMO's.

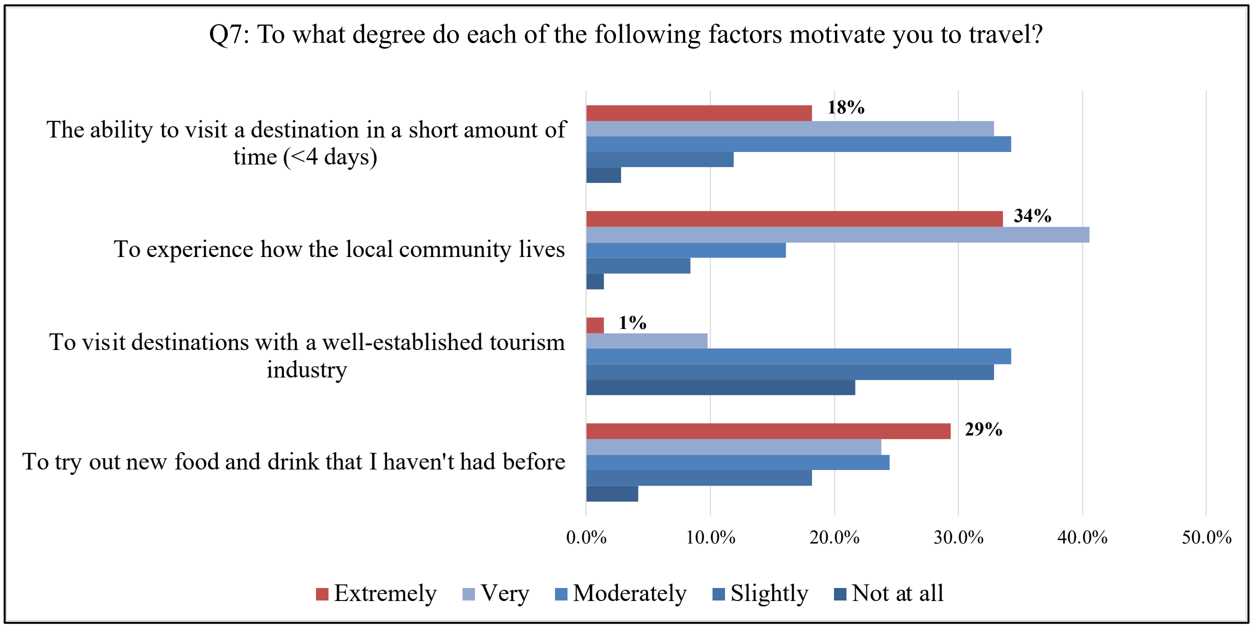
Table 4.3. Relationship between craft beer consumers and travel preference 'I prefer to visit places that have been mostly undiscovered'

		Q4: Do you intend to visit a craft beer road?		
		Total	Yes	No
Q5_1: How much do you agree with the following statements? | I prefer to visit places that have mostly been undiscovered, especially before hotels and restaurants have been built	Total Count	131.0	110.0	21.0
	Strongly disagree	4.0	2.0	2.0
		3.1%	1.8%	9.5%
	Somewhat diagree	11.0	7.0	4.0
		8.4%	6.4%	19.0%
	Undecided	29.0	24.0	5.0
		22.1%	21.8%	23.8%
	Agree	58.0	50.0	8.0
		44.3%	45.5%	38.1%
	Strongly agree	29.0	27.0	2.0
		22.1%	24.5%	9.5%
	Average	3.7	3.8	3.2
	Median	4.0	4.0	3.0

Table 4.3 shows that 70% of craft beer road consumers responded that they either "agree" or "strongly agree that 'I prefer to visit places that have been mostly undiscovered…" On the other hand, only 47% of those who did not intend to visit a craft beer road responded "agree" or "strongly agree" to the same statement. The implication is that craft beer road consumers are strongly associated with allocentricity for this question and prefer tourist destinations that are in early stages of development and not yet visited by many tourists.

Looking at respondents' replies to travel motivation statements, Figure 4.14 shows Likert scores (1-5) for all 4 statements.

Figure 4.14. Motivating factors for travel (n=143)



The highest rated statements ("extremely important" on Likert scale) were "to experience how the local community lives" (34%) with a followed by "to try out new food and drink that I haven't had before" (29%). This is relevant to the topic of craft beer because it underscores the idea that gastronomic tourism like craft beer roads can connect tourists with the culture of the territory. It also supports previous research that craft beer tourists are generally interested in trying out new experiences (i.e. food and drink) compared to non-beer tourists (Stone, 2020) and have a desire to connect with the community and unique products (Fletchall, 2016). These two highest rated questions (Q7_3 and Q7_1) are associated with allocentricity according to Plog's (1995) 4 question metric while the lowest rated statement was "to visit destinations with a well-established tourism industry" which had only 1% of respondents scoring it as "very important" and is associated with psychocentric types. In all, respondents tended to be associated with allocentric types for this question.

To further break down motivation statements about travel, those who intend to visit are compared to the whole sample to see if the motivation statement scores differ. In this case, the two motivation statements with the highest Likert rating (Table 4.4) from the whole sample were compared to those who intend on visiting versus those who don't intend on visiting.

Table 4.4. Relationship between intention to visit and motivation statement 'to experience how the local community lives'

		Q4: Do you intend to visit a craft beer road?		
		Total	Yes	No
	Total Count	131.0	110.0	21.0
Q7_3: To what degree do each of the following factors motivate you to travel? | To experience how the local community lives	Not at all	2.0	1.0	1.0
		1.5%	0.9%	4.8%
	Slightly	12.0	9.0	3.0
		9.2%	8.2%	14.3%
	Moderately	21.0	15.0	6.0
		16.0%	13.6%	28.6%
	Very	54.0	46.0	8.0
		41.2%	41.8%	38.1%
	Extremely	42.0	39.0	3.0
		32.1%	35.5%	14.3%
	Overall Stat Test of Percentages	0.11577702727610333		
	Average	3.9	4.0	3.4

Table 4.5. Relationship between intention to visit and motivation statement 'to try new food and drink that I haven't had before'

		Q4: Do you intend to visit a craft beer road?		
		Total	Yes	No
	Total Count	131.0	110.0	21.0
Q7_1: To what degree do each of the following factors motivate you to travel? | To try out new food and drink that I haven't had before	Not at all	6.0	5.0	1.0
		4.6%	4.5%	4.8%
	Slightly	24.0	15.0	9.0
		18.3%	13.6%	42.9%
	Moderately	33.0	30.0	3.0
		25.2%	27.3%	14.3%
	Very	30.0	24.0	6.0
		22.9%	21.8%	28.6%
	Extremely	38.0	36.0	2.0
		29.0%	32.7%	9.5%
	Overall Stat Test of Percentages	0.0111549416947467 96		
	Average	3.5	3.6	3.0

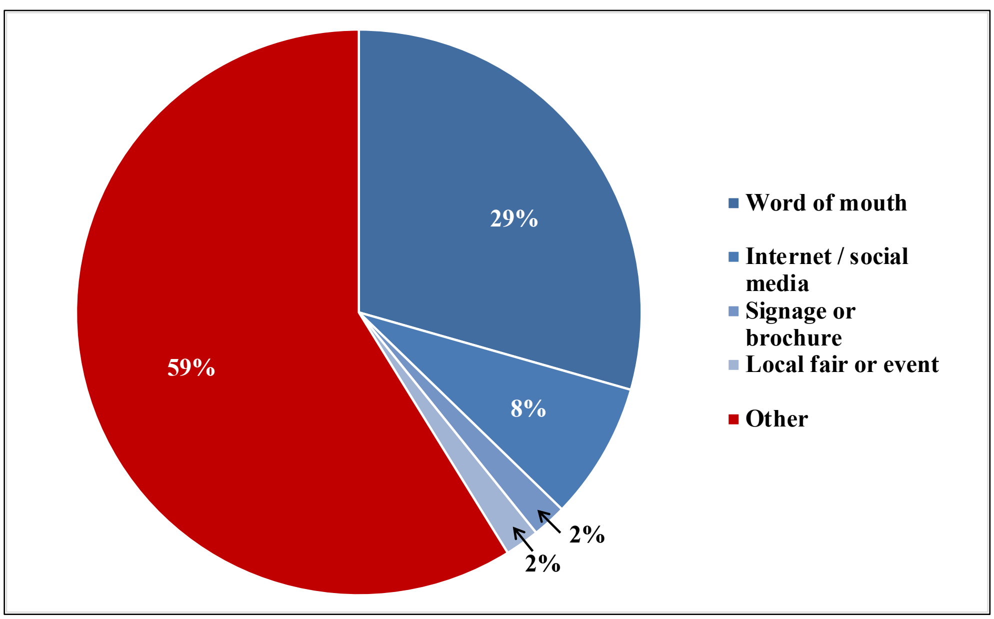
The intention for relating the two questions above is to see what motivates craft beer road consumers to travel. Results from a t-test show that the statement "to try new food and drink that I haven't had before" is positively correlated to those responding that they intend to visit a craft beer road. This was demonstrated by a p value of 0.0187 from a t test and a median Likert score of 4 indicating "very" on a scale of importance. Likewise, "to experience how the local community lives" had a p value of 0.0249 from a t test between intention to visit and this motivation statement. The median Likert score was also 4, or "very" important.

Based on the questionnaire results, an intersection emerged between allocentric tourist types and the drivers of craft beer tourism. Based on previous research, the factors that craft beer consumers desire such as connection with community and a desire for unique consumer products (Murray and Kline, 2014) fit well with the travel motivations of allocentric tourist types.

4.2.4 Knowledge of the Pedemontana Veneta beer road

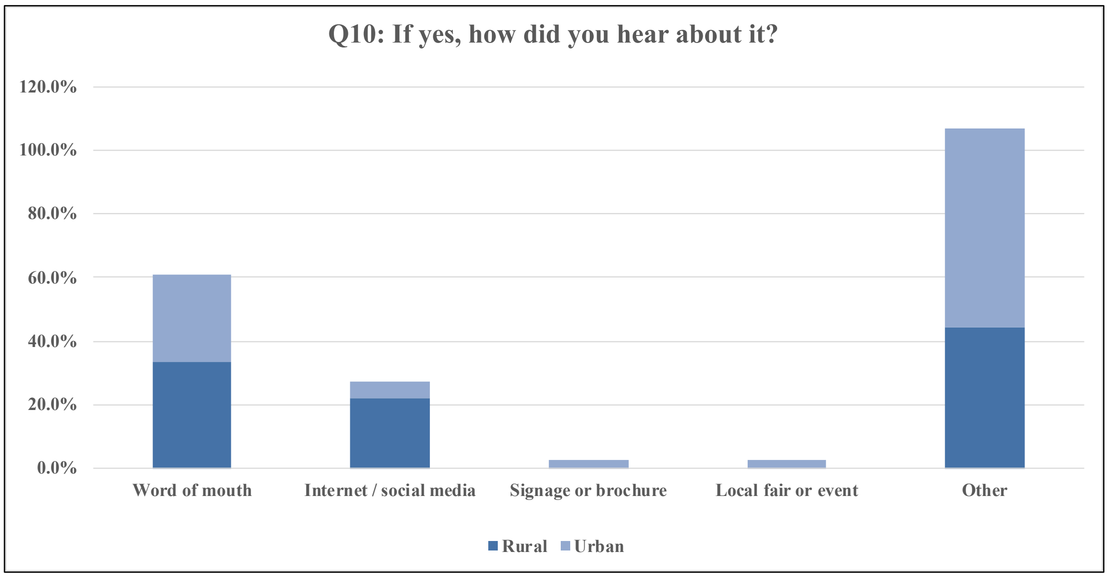
Those responding that they had heard of the PV craft beer road were only 9%. Out of the 13 of respondents who had heard of the PV beer road, 1 of them had seen a sign or logo for it. Figure 4.15 details how respondents heard about the PV road. A total of 8% (11) of respondents said that they had heard of the *Birrifici Aperti* event that happened in 2022 for the PV breweries. Overall results show very low knowledge of the PV beer road by residents of the Vicenza province.

Figure 4.15. How respondents heard about the Pedemontana Veneta craft beer road



The lack of awareness about the PV beer road means that there is ample opportunity to further develop the marketing and promotion. There could be many reasons that public awareness is low, but recommendations for how to potentially increase the public knowledge about the PV beer road will follow in the discussion section. The "other" category leaves the question of what "other" means exactly. For those that responded, "word of mouth", 79% were living in urban communities and 21% were living in rural communities. For those had heard of it through social media the urban and rural residents were equal, and for both signage and local fair/event, only urban residents had heard it this way (see Figure 4.16) below.

Figure 4.16. Relationship between knowledge of the Pedemontana Veneta craft beer road and location of residence



The implications of the responses could be that those living in urban areas had more ability to hear about the PV beer road or to see brochures and local events featuring craft beer. This could be due to many factors including urban residents being more mobile to travel to events or that they generally are surrounded by a network that informs them about tourist activities and craft beer events.

4.2.5 Motivations to visit a craft beer road

Answers to motivational statements were recorded using Likert scale of importance (1=not at all, 5=extremely). Those questions with motivation statements with say, a median of 2 or lower would be in less agreement/put less importance than those with a median of 4 for the statement.

Table 4.6 indicates the scores for statements about visiting the PV craft brewery specifically (question 13) and table 4.7 about visiting a craft brewery in general (question 14). The objective of using motivation statements in this section was to help answer the first research question: who is the craft beer road consumer and what are their motivations to visit a craft beer road? Understanding which factors are scored higher on the Likert scale can help in directing the development of craft beer roads and knowing which aspects to devote resources to by craft beer tourism stakeholders.

Table 4.6. Median score responses to motivational statements (Pedemontana Veneta beer road)

Q13: How much would each of the following factors motivate you to visit the Pedemontana Veneta beer road?	**n**	**Mean**	**Median**
Transportation arranged to take you to and from breweries	139	2.95	3.0
Distance from your home	139	3.24	3.0
Activities near the brewery such as outdoor recreation or cultural / historical sites	139	3.36	4.0
Availability of a wide variety of food	138	3.36	3.0
A large variety of beer styles to try	139	3.46	4.0
The option to see live music / other entertainment	139	3.72	4.0
Note: Likert scale for scores: 1=not at all, 5=extremely			

The investigation into the specific factors of motivation at the PV beer road are to show the level of importance of different aspects of the craft brewery experience. The highest rated statement was "to option to see live music/entertainment" with a median Likert score of 4 or "very" with a mean of 3.7. followed by "a large variety of beer style to try." The breweries on the PV craft beer road each offer various features such as live music/entertainment, large variety of beer styles, and tours. The inventory done in Figure 3.18 of Chapter 3 highlights some of these features and can be used as a reference to understand how each brewery might further develop their craft brewery to satisfy customers. For example, 6 of the 17 (35%) breweries had live entertainment available. Meanwhile, 12 (70%) of the breweries had at least 5 different beer styles available.

The lowest rated statement was "transportation arranged to take you to and from breweries" with a median Likert score of 3 and mean of 2.9. So, for Vicenza residents (69% of sample), arranged transportation is not important. This implies that for local tourists, transportation is not viewed as necessary to visit the craft beer road, but this may be different for international tourists.

Table 4.7. Median and mean score responses to motivational statements to visit a craft brewery

Q14: In regards to a craft beer road, how important are the following aspects when deciding to visit a craft beer road?	**n**	**Mean**	**Median**
To drink craft beer and/or buy craft beer	135	3.36	3.0
To socialize which includes getting family and friends together and/or meeting other people with an interest in craft beer	137	3.74	4.0
For enjoyment which includes getting away from home and/or relieving stress	137	3.82	4.0
To participate in the craft brewery experience which includes tasting craft beer and/or learning about craft beer	138	$\boxed{3.91}$	$\boxed{4.0}$
Note: Likert scale for scores: 1=not at all, 5=extremely			

Table 4.7 considers the different statements about motivation related to Kraftchick's (2014) study on visitors in the United States the revealed 4 main motivational factors for craft beer tourists to visit a brewery. The results from this sample indicate that the craft brewery experience is the most important motivator with a median of 4, or "very" important and a mean of 3.9 followed closely by "For enjoyment which includes getting away and/or relieving stress" rated with a median of 4 and a mean of 3.8. The results support the idea that craft beer tourists value the craft beer experience. This could encompass learning about craft beer, new taste experiences, and moving away from the mainstream beer consumption which is supported by previous studies on craft beer consumers (Garavaglia, 2010).

To further segment respondents in the craft brewery motivations statement "to participate in the craft brewery experience" from Table 4.7, craft beer versus non-craft beer consumers were compared (Table 4.8). Craft beer drinkers were more motivated by this statement (76% of respondents), however 54% of non-craft beer drinkers still said it was "very" or "extremely" important in their decision to visit a craft brewery.

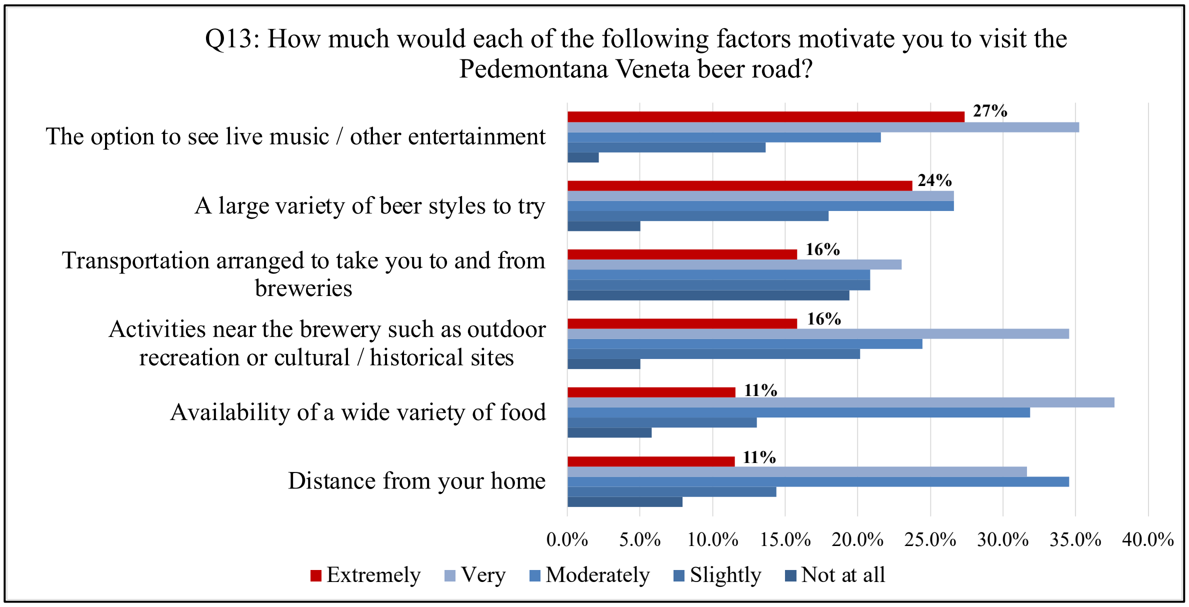
Table 4.8. Relationship between craft beer drinkers/non-craft drinkers and motivations to visit a craft beer road

		Q2: Are you a craft beer drinker?		
		Total	Yes	No
Q14_1: In regards to a craft beer road, how important are the following aspects when deciding to visit a craft brewery? | To participate in the craft brewery experience which includes tasting craft beer and/or learning about craft beer	Total Count	138.0	105.0	33.0
	Not at all	2.0	0.0	2.0
		1.4%	0.0%	6.1%
	Slightly	10.0	7.0	3.0
		7.2%	6.7%	9.1%
	Moderately	28.0	18.0	10.0
		20.3%	17.1%	30.3%
	Very	56.0	45.0	11.0
		40.6%	42.9%	33.3%
	Extremely	42.0	35.0	7.0
		30.4%	33.3%	21.2%
	Overall Stat Test of Percentages		0.03302022731450512	
	Average	3.9	4.0	3.5
	Median	4.0	4.0	4.0

For craft beer road consumers in the Vicenza province, there is a high degree of interest in the experiential tourism aspect of craft beer roads indicated by the response about motivating factors to visit that even non-craft beer drinkers had. Specifically, the desire was to participate in the brewery experience which includes tasting craft beer and/or learning about craft beer.

Figure 4.17 shows motivational factors to visit the PV beer road for the whole sample (n=139) and gives an idea about what potential visitors to the PV beer road would be looking for in a craft beer road.

Figure 4.17. The motivational factors to visit the Pedemontana Veneta beer road (n=139)



From Figure 4.17, the motivational statement with highest Likert score response of "extremely" was "the option to see live music/other entertainment" followed by "a large variety of beer styles to try". The next statement with the highest score was "activities near the brewery such as outdoor recreation or cultural/historical sites." For those who drink craft beer, a large variety of beer styles to try makes sense. This is supported by research from Carbone (2019) and Donadini et al., (2017) that a diversity of beer options and new styles and tastes were important to craft beer consumers. For those who may be looking for other activities in conjunction with the PV beer road besides craft beer, these are strong motivators: live music/entertainment, a wide variety of food, and activities nearby the brewery.

In Table 4.9 is a summary how craft beer drinkers (n=105) scored motivational statements about visiting the PV beer road. For craft beer tourism stakeholders, knowing what types of activities could be prioritized at the PV beer road based on consumer segment may be valuable. Results show that for craft beer drinkers, 'the option to see live entertainment' is rated the highest with a median score of 4 and mean score of 3.8 with 'a large variety of beer styles to try' just behind with a median score of 4 and mean score of 3.7. The results are similar to those of the whole sample. 'Transportation arranged to take you to and from breweries' was rated the lowest at a median and mean of 3.

Table 4.9. Craft beer drinkers' motivations to visit Pedemontana Veneta beer road

Q13: How much would each of the following factors motivate you to visit the Pedemontana Veneta beer road?	n	Mean	Median
Transportation arranged to take you to and from breweries	105	3.00	3.0
Distance from your home	105	3.20	3.0
Activities near the brewery such as outdoor recreation or cultural / historical sites	105	3.30	4.0
Availability of a wide variety of food	105	3.50	4.0
A large variety of beer styles to try	105	3.70	4.0
The option to see live music / other entertainment	105	3.80	4.0
Note: Likert scale for scores: 1=not at all, 5=extremely			

By looking at the non-craft beer drinkers (n = 34) who answered statements about the PV road brewery features (Table 4.10), the highest rated was "activities near the brewery such as outdoor recreation and/or cultural sites." This is different than both craft beer drinkers and the whole sample who rated this statement lower (median of 3, "moderately" versus 4, "very").

Table 4.10. Non-craft beer drinkers' motivations to visit Pedemontana Veneta craft beer road

Q13: How much would each of the following factors motivate you to visit the Pedemontana Veneta beer road?	n	Mean	Median
Transportation arranged to take you to and from breweries	34	2.90	3.0
Distance from your home	34	3.20	3.0
Activities near the brewery such as outdoor recreation or cultural / historical sites	34	3.60	4.0
Availability of a wide variety of food	34	3.00	3.0
A large variety of beer styles to try	34	2.70	3.0
The option to see live music / other entertainment	34	3.50	3.5
Note: Likert scale for scores: 1=not at all, 5=extremely			

4.3 Discussion

This overall aim of this research was to discover how craft beer can help create new tourism opportunities. The primary research question focused on the consumer side, identifying who the craft beer road consumer is and what motivates them to visit. A secondary question was to explore the opportunities and challenges associated with developing craft beer roads. The consumer questionnaire was especially helpful in answering the first question and, to a lesser extent, the second. Additionally, a literature review of craft beer industry reports provided further insights into the opportunities and challenges, supplementing the questionnaire data. Reports were published by Assobirra, UbObiart, and Veneto Agricoltura. This section will outline the key implications of the results and offer recommendations for future actions by craft beer tourism stakeholders. The section is organized around themes that emerged from both the questionnaire responses and recent industry reports.

4.3.1 Opportunities and challenges

Based on the questionnaire results, the number of respondents indicating that they intended to visit a craft beer road was high, at 83%. In fact, 70% of those that replied that they did not drink craft beer responded that they still intended to visit a craft beer road. This reveals an opportunity for craft beer roads to be appealing to a variety of tourists and not only craft beer consumers. Recalling table 4.7 summarizing questionnaire respondents' motivation statements "To participate in the brewery experience which includes tasting craft beer and/or learning about craft beer" and "for enjoyment with includes getting away from home and/or relieving stress" indicate an opportunity for breweries to tailor their business to these consumer interests.

Research on experiential tourism (Hojman and Hunter-Jones, 2012) suggests that tourists increasingly seek unique cultural experiences tied to local food and drink. Travelers explore farms, vineyards, festivals, and trade shows to enjoy regional flavors while engaging with local traditions, cultures, and economies. According to Eades et al., (2017), craft beer could be at the helm of a new model for developing authentic tourism experiences by highlighting what makes a region or territory a unique and authentic destination. Craft breweries on the PV beer road and across Italy are well-positioned to meet this consumer interest and could be at the forefront of an emerging trend to combine craft beer with experiential tourism. If this trend holds in Vicenza, craft beer roads could be expanded to incorporate diverse experiential tourism offerings, complementing efforts by the Pedemontana Veneta e Colli DMO to promote cultural and outdoor activities in the region. Questionnaire respondents from this study highlighted that their top motivations for visiting a craft beer road included live music/entertainment, a wide variety of beer styles, and access to nearby outdoor and cultural attractions. These findings present opportunities for craft beer producers to prioritize these features of their breweries and brewpubs and to potentially work with tourism planners to host collaborative events expanding local activity options.

In terms of the growing number of agricultural breweries in Italy, there are opportunities for those that are a part of craft beer roads to develop the experiential tourism aspect of their regional tourism offer. As previously mentioned, Veneto had the second largest number of agricultural breweries opened in the last 3 years of all of the Italian regions (Veneto Agricoltura, 2021). These craft breweries that grow hops and barley can engage tourists with the experience of seeing agricultural production combined with tours, followed by craft beer tasting. This has already been developed for wine routes where tourists are immersed in an experience encompassing “sense of place” and terroir that connects the product (in this case wine) to that place (Vos, 2019; Ashton, 2014). For example, the tourist can see the vineyards, production facilities and taste the product. Sometimes tourists are also involved in the harvest (*vendemmia*) of the grapes which even more immersive. Along these lines, a very recent initiative called *Luppoleti Aperti* (Open Hop Groves) was created by Coldiretti and the Italian Beer Consortium. It is based on a network of 13 agricultural craft breweries throughout 12 different regions involved in experiential tourism. The idea is the promote craft beer with a specific terroir and a specific link to territories (Coldiretti, 2024). The initiative includes a website[6] of the Italian craft breweries involved, creating a craft beer tourism network. From here, a web link to a private third party can handle the reservations. This could be an opportunity for the agricultural breweries on the PV beer road to join another craft beer tourism network that connects their craft beer product with consumers looking for an authentic experience tied to the territory.

Regarding the supply chain of Italian craft beer, the fact that two of the primary materials (barley and hops) are being more widely cultivated is an opportunity for craft beer tourism. The availability of local raw materials can indirectly affect the craft beer tourism sector because increasing cultivation of these materials opens the possibility of combining agricultural production with experiential tourism. Barley is a rustic crop that can be grown in marginal areas. There are positive effects on the local economy of rural areas if barley is grown there, giving the potential to develop agricultural brewery operations or at least act as a supplier. Meanwhile, although hops have been grown in Italy on a very small scale and often are experimental in nature (Mozzon et al., 2020), there are now initiatives supporting the Italian hops supply chain. Hops are also a plant that is well-suited to internal marginal areas such as the Italian Apennine

[6] Open Hops Groves website https://www.consorziobirraitaliana.it/luppoleti-aperti-2024/

area and could serve to revitalize agriculture in these areas (Mozzon et al., 2020). For example, the Italian organization MiPAAF[7] (Italian Ministry of Agricultural, Food and Forestry Policies) funded a project promoting hop variety development with a database of native hop varieties that can support future breeding programs (Veneto Agricoltura, 2021). And, according to studies on Italian agricultural breweries such as Fastigi et al., 2016, connecting craft brewing with agriculture represents a market opportunity that could allow for a larger share of the added value to be retained. Longer-term economic, social and environmental sustainability is possible mostly by the creation of local supply chains. If agricultural entrepreneurs can address this opportunity in a dynamic and innovative way, there is a lot of potential.

An interesting observation based on demographics of the questionnaire results is that the largest group of the craft beer consumers were between the ages of 36-44 (47%) which is the same age cohort as most of the craft brewery operators in Italy. According to UbObiart (2023) survey of 130 craft brewery operators, 46.2% of them were between 35-44 years old. The implications could be that those leading the development and marketing of craft breweries in Italy have a good understanding of their main consumer group based on their shared ages and interests in craft beer. This could be considered an opportunity for craft breweries to connect with consumers of their product much more easily than if the consumer and operator of vastly different generations. The level of education between craft beer producers and consumers was also related. Both groups tended to have a mid-high level of education with 45.4% of producers having a laurea triennial or magistrale degree and craft beer consumers at 76%.

In discussing the challenges to craft beer road development, the concept of collaboration was revealed to be important. The very definition of a craft beer road underscores the importance of collaboration between producers. Craft beer roads have been shown the ability to attract visitors to a destination (Plummer et al 2005, 2006) but there must be an organized method of promotion and shared objectives by the members of the road. These include promotional materials like maps and itineraries that can be shared on websites, social media, or by word of mouth. According to the questionnaire results, only 9% of those living in the Vicenza province (n=130)

[7] A Rome-based department of the Italian government that produces and coordinates policies on agriculture, forests, food and fisheries at a national, European and international level

had heard of the Pedemontana Veneta beer road or the *Birrifici Aperti* (Open Brewery) event. One can conclude, then, that a challenge for the PV beer road is the strength of marketing and this could be a result of needing more collaboration between the breweries. The individual breweries are involved in many projects to promote their craft beer, but not particularly involved in the PV beer road as a regional tourism initiative.

Recalling a survey of 65 craft beer producers by Veneto Agricoltura (2021), a main challenge and perceived need was “coordination of promotional actions between producers" and “development and creation of specific events for the sector.” There could be many reasons behind this such as varying objectives by the PV breweries, competition between them, or even a perceived lack of consumer support for such activities like craft beer roads. The breweries may have already developed other promotional strategies and put into place and may be less inclined to consider craft beer roads as a potential business strategy. So, while favorable conditions have been set as far as consumer interest and demand as well as some positive legislation for craft beer, specific actions could be taken by craft beer tourism stakeholders which enhance the current craft beer road tourism product. In summary, research findings on challenges cited craft beer producers by Duarte (2017) may still apply today. These challenges were the lack of cohesion among brewers, insufficient institutional support, and a weak regional identity as craft beer destinations.

Finally, an important subject that affects craft beer production is climate change. The challenge of adverse weather events on the production of raw materials like barley is one that should be mentioned. According to Coldiretti, in 2022, roughly 34% of the malting barley harvest was lost due to either flooding in the north or draught in the south of Italy (Veneto Agricoltura, 2021). Future climate change forecasts show that barley production will be negatively affected. Droughts may be the most impactful, reducing both yield and quality of barley. More than 60% of the world’s barley production is provided by Europe and grown by rainfed conditions (Giraldo, et al., 2019). While Italy currently cultivates a relatively small amount of barley, 2% of total European hectares (Lovarelli et al., 2020), the future of a 100% Made in Italy craft beer supply chain is threatened as well as the potential for agricultural breweries tied to tourism. While a local supply chain for craft beer production is a main goal of the sector, extreme weather events can be a challenge to overcome, potentially highlighting technology and innovation as partial solutions. For example, developing new cultivars of both spring and winter barley which are suited to Italian environments may allow barley to tolerate future climate conditions (Bindereif et al., 2021). Another concern related to the craft beer sector linked to climate change is tourist behavior. Based on an online market research survey of 6,001 European travelers, the second most important factor for European tourists in choosing a travel destination is "pleasant/stable weather." (European Travel Commission, 2024). Since Italy remains one of the top travel destinations in Europe, adverse weather events linked to climate change affecting Italian regions could have a significant impact on travel decisions by tourists.

4.3.2 Allocentric craft beer road consumers and the appeal of experiential tourism

One of the aims of the first research question was to identify a craft beer consumer profile. Part of this involved applying Plog's (1974) tourist psychographic typology to the craft beer consumer to see if they could be segmented as allocentric or psychocentric. The goal was to determine to what degree an allocentric personality type would be more likely to visit a craft beer road than a psychocentric personality type. Recall that according to Plog's model, allocentric types prefer less developed tourist destinations, are more adventurous and seek new experiences while psychocentric types prefer more developed destinations and repeat experiences. Craft beer roads like the PV road would be categorized as being in the exploration phase based on Butler's (1980) evolution of tourist destinations. The combined model of Plog and Butler from chapter 2 (Figure 2.2) states that allocentric types would be the first to visit a tourist destination in this exploration phase. The implications would be that craft beer tourism developers could use tourist typology information to better position themselves in the local tourism market.

Results of the data analysis of all 16 personality-based statements revealed correlation between Plog's allocentric tourist type and the Likert scale responses indicating level of importance to statements. In particular, the respondents' Likert scores that were highest (a mean of 4 or above) related to the allocentric traveler type was "I would like to travel to a novel, non-touristy location where there may not be many hotels or restaurants" which falls under vacation preference. The highest rated statements under travel motivations were "To try out new food and drink that I haven't had before" followed by "to experience how to local community lives." Murray and Kline's (2014) study of rural tourism and craft beer experiences identified that drivers of craft beer tourism were "connection with community" and a "desire for unique products." This underscores the results of the questionnaire showing high travel motivation to experience how the local community lives and to try out new food and drink. The statements' Likert scores about personality also indicated a stronger tendency towards allocentric traveler types. As shown in Figure 4.7, the CA performed on the same 16 statements resulted in two identifiable clusters within the sample, one more allocentric (67%) and the other psychocentric (33%).

The implications of the questionnaire results on the Plog psychographic type could be that travelers interested in visiting a craft beer road lean towards allocentric types. This confirms the assertion by Plog (1974) and Butler (1980) that less developed tourist destinations (like craft beer roads in Italy) are likely to be chosen by allocentric traveler types and as the destination becomes more known and developed, more mid-centric and psychocentric traveler types would want to visit. In this case, knowing that craft beer consumers agree with the specific statements above can aid in targeted marketing towards them. However, it is important to recognize there are other factors that determine travelers' destination choice such as time, money, and social influence (McKercher, 2005a). From the results, a general profile can be assigned to those intending to visit craft beer roads. This leaves an opportunity for future studies to confirm findings and create more generalizability about traveler typology related to craft beer tourism. By examining the socio-demographic results within the two clusters of allocentric versus psychocentric, an even more specific tourist profile was identified.

The allocentric respondents were typically between 36-45 years old based on the number of respondents, but the proportion of 26-35 age group was the highest in terms of allocentric type (86%). When relating the two clusters to the variable intention to visit a craft beer road, it was found that of the allocentric cluster, 91% intended to visit while 70% of the psychocentric cluster intended to visit. So, here we have a partial profile of the potential craft beer road consumer from the CA, which is one that prefers less developed tourist destinations, new experiences, and is between 36-45 years old. This information combined with socio-demographic results give an even more detailed consumer profile. From questionnaire results of the craft beer road consumer we can add they are: working full-time, are college educated, are satisfied with household income, and live in urban communities.

Because the questionnaire data was collected from primarily domestic (i.e. Italian) tourists, and Plog's original study was done on American tourists travelling internationally, it is interesting to see there is still support for his framework across the cultural divide. The results also support that Plog's typology has been successfully supported by studies in countries like Australia, Canada and Portugal (Plog, 2001).

Craft beer is an experience-based product, and the results of this inquiry show that craft beer road consumers are not always craft beer drinkers. This is supported by research cited earlier by Stone et al. (2020) that demonstrated that beer tourists have a high interest in diverse activities. They tend to show a higher openness to new experiences and a desire to broaden their taste preferences, encompassing not only beer but also various food and beverage experiences. By combining results of the questionnaire and past research, a suggestion could be that breweries on the PV road incorporate other touristic itineraries in the area to be sure non-craft beer drinkers had activities that appeal to them. Or, the breweries themselves could develop activities within the brewery even for non-craft beer drinkers such as educational tours, trivia nights, entertainment, or an ample selection of food.

Responses to motivation statements based on a study by Kraftchick (2014), showed agreement that "to take part in the craft beer experience which includes tasting craft beer and/or learning about craft beer" was a strong motivating factor to visit a craft beer road. Regardless of psychographic type or craft beer drinking habits, respondents were interested in the craft beer experience. Another statement with mean Likert score of 3.8 indicating "very" important was "For enjoyment with includes getting away and/or relieving stress." The takeaway is that consumers want the experience of craft beer, and they want to have a good time and relieve stress. Craft beer has the potential to provide this sort of experiential tourism, which, according to a recent consumer survey by the Italian Beer Consortium (2023) is a main interest of tourists in Italy. One of the focuses of Unionbirrai for the upcoming year was on developing craft beer tourism to promote Italian territories and the results of this questionnaire support this initiative.

An online market research survey of 4,399 respondents by the Euruopean Travel Commission revealed that one of the most popular type of trips by Europeans was characterized as "diving into local culture” just behind “gastronomic experiences.” Questionnaire results support this trend, where travel motivations responses revealed that the highest rated statements were “to experience how the local community lives” (34%) followed by “to try out new food and drink that I haven’t had before” (29%). This is relevant to the topic of craft beer tourism because it underscores the idea that gastronomic tourism can connect tourists with the culture of the territory. Past research by Skoglund & Sjölander-Lindquist (2020) supports this concept that consumers are interested in gastronomy beyond just consumption but also in local culture, taste and production methods. By consuming local products, or at least visiting a place like a craft beer road, the tourist can get to know the identity of a place. The recognition by tourists of a community as a unique place with locally-made, high-quality products can help to ensure the sustainability of that community, especially rural ones. For this sample, there is a high interest in exploring food and drink and in experiencing local community which would support a craft beer tourism offer.

4.3.3 Further development of the Pedemontana Veneta craft beer road

Data from the consumer questionnaire supports the development of craft beer road itineraries that would include other activities near the breweries. For nearly 50% of respondents, “activities near the brewery such as outdoor recreation or cultural/historical sites” was rated as “very important” and “extremely important” for another 21% of respondents.

Developing a comprehensive map of the PV beer road could attract visitors not only to the craft breweries but also to the region's other attractions. The map in Chapter 2 (Figure 2.4) illustrates how a tourism bureau featured local breweries alongside nearby attractions. Similarly, the Finger Lakes Beer Trail in the U.S. has a website offering self-guided itineraries, allowing visitors to explore the trail and region without a tour guide. To further enhance the PV beer road, creating distinct itineraries within the larger route could draw more tourists to craft breweries while showcasing additional attractions, ultimately benefiting the local economy. There is a natural division between the northern and southern breweries (as shown in the map in Chapter 3). This concept is supported by the collaboration of three northern PV breweries at a local festival in Laghi, Italy, in September 2024, where they showcased their beers as part of a larger event promoting the town. Complementary to map creation to attract craft beer tourists, creating a craft beer theme connecting the PV road to the Province of Vicenza may be helpful. Croce and Perri (2017) describe completing an inventory of all tourism offerings related to the product and (in this case craft beer) and involve public and private stakeholders in the process. This can be a complex task but by developing a distinct identity tied to craft beer can help set the destination apart from other areas and reinforce its distinct sense of place.

Because Italian craft beer consumers have shown an interest in beer and food coupling (UbObiart, 2023), the combination of food and craft beer collaborations could be implemented to focus on events where local restaurants and breweries join forces at festivals. A focus on food and craft beer could create stronger ties between local producers and foster collaboration between the actors in the regional tourism network. Looking to the example of the City of Apecchio's Alogastronomia festival as described by (Pezzi, 2017) the food and craft beer combination proved to be highly effective in the local economy's revitalization. Apecchio's emphasizes their white truffles with craft beer to offer a yearly festival focused around these offers as well as other regional specialties. The National Association of Beer Cities that was created in 2015 as part of the craft beer tourism initiative for the Apecchio area. The association could be a source of advice and used for ideas about promotion and branding for other craft beer roads like the one in Vicenza. Some craft beer tourism stakeholders like public authorities could lead a food and craft beer festival that would create an identity of Vicenza as a craft beer travel destination.

4.3.4 Developing promotion and communication channels

Based on the low number of those who know about knowledge of the PV craft beer road (9% of respondents), more promotion of the road is needed. Several factors could contribute to this lack of visibility of the PV road, including limited collaboration among breweries and inadequate motivation or resources dedicated to marketing. Among those who were aware of the PV road, the most common discovery methods were "Other" and "word of mouth." However, the category "Other" lacks clarity, leaving the specifics unknown. To enhance publicity, improved signage and increased social media promotion could be effective strategies. The Pedemontana Veneta and Colli DMO could play a pivotal role in distributing more marketing materials, such as maps and brochures, directly to the PV breweries for display or distribution to consumers. Another approach could involve engaging local establishments that serve craft beer, such as the Drunken Duck pub in Vicenza, which could provide maps or signage about the PV beer road for patrons.

Currently the Visit Pedemontana website for the DMO includes many itineraries for outdoor recreation, cultural, and enogastronomic tour itineraries. The website is a collection of possible tourist attractions that can be searched by subcategories. Two of the categories are ‘gastronomy’ and ‘tastings’ where vineyards and mountain huts are featured. One tour was found that featured the historic breweries of Piovene Rochette which is also featured on the PV beer road map. However, the PV beer road itself as a tourist attraction or suggested itinerary was difficult to find on the DMO website. By incorporating the PV beer road breweries in the selection of offerings in the Visit Pedemontana website or social media accounts, this regional tourism initiative could have more publicity and potential visitors.

A 2022 survey of craft beer producers highlighted a main concern which was “marketing and consumer education” (UbiObiart, 2023). The questionnaire results align with these concerns, suggesting that improved promotional strategies by craft breweries are needed. Effective options could include enhanced signage for the craft beer road, print materials from local tour operators or food/wine businesses, or events like *Birrifici Aperti*, which was held in May 2022 to promote local breweries. Social media, viewed as a form of “guerrilla marketing,” is a favored low-cost advertising method for craft breweries to promote their products and upcoming events. While continuing to utilize social media, exploring additional marketing channels could help reach a broader audience. Establishing a central information hub like a website for local craft breweries could be a beneficial initiative. Potential tourists whether local, regional, or international could easily search online for the PV craft beer road and find a dedicated website or portal that offers comprehensive information to aid in their planning. This resource could feature a list of breweries, incorporate the existing DMO map, and highlight other local attractions such as restaurants, hotels, and outdoor activities (with various language options). This addition would complement the existing Visit Pedemontana social media and website, which are tailored for craft beer tourists visiting from anywhere in the world.

Recalling past studies about tourism networks (Carbone, 2016), the creation of networks among stakeholders in the tourism industry is one existing challenge to overcome. The involvement by public authorities is important to promote products linked to a specific territory, and ways to do this are through local fairs and events. Doing this can create more cooperation between stakeholders. In the case of craft beer roads like the PV beer roads, with more coordinated communication by the craft beer producers on the road with public authorities, promotion could be more successful. By looking at an example of regional branding, Apecchio was able to gain public support by forming an association between stakeholders, followed by a branding (*Città della Birra*), and the creation of an annual food and beer event (*Alogastronomia).* The coordinated actions of craft beer stakeholders in this case pull together all of the same aspects that Veneto Agricoltura's survey of craft beer producers in Veneto found as important interventions for developing the sector. These needed interventions were: increased public support and incentives for microbreweries, coordinated promotional actions between producers such as forming associations, and development and creation of specific events for the sector (Veneto Agricoltura, 2021).

Chapter 5. Conclusion

In recent decades, the craft beer sector in Italy has grown significantly. It has diversified the beer market in response to changing consumer demands. Consumers increasingly search out craft beer with unique organoleptic qualities and a strong link to the place of production (UbObiart, 2023; Garavaglia, 2010). This shift has created a new focus on craft beer tourism as a strategy for local and rural development. Trade groups and producer organizations such as Unionbirrai and the Italian Beer Consortium advocate for craft beer tourism as a key initiative for craft breweries aiming to attract tourists. According to the 2023 Food and Wine Tourism Report, in 2022, seven out of ten tourists traveling to Italy have engaged in at least five food, wine, or beer-themed experiences during their recent trips. This is an increase of 25% compared to 2021 (Garibaldi, 2023). Despite this growing interest in gastronomic tourism, research on craft beer tourism's integration into regional tourism development is still limited. There remains an untapped opportunity for tourists seeking out craft beer and experiential activities to find it within Italian communities.

5.1 Policy suggestions

The Veneto Region is known for its exceptional gastronomy, and craft beer is emerging as a example that needs recognition, protection, and promotion. This thesis focused on the emerging trend of craft beer tourism and its potential in creating tourism opportunities, using the case of the Pedemontana Veneta craft beer road in the Vicenza province. Findings from this study suggest that several improvements could improve the success of craft beer tourism in this area. Recommended interventions include bolstering marketing efforts to build a place-based identity around craft beer, fostering stronger collaboration among stakeholders, and establishing enhanced communication channels.

Craft breweries present a valuable economic opportunity, especially for rural areas representing a young, dynamic, and growing sector. Producer groups have advocated for tax code revisions for small craft breweries (those producing less than 10,000 hL annually), a change that would allow these businesses to reinvest tax savings into infrastructure, marketing, and training. Such investments would facilitate the ongoing development of craft beer production, while government support for agricultural breweries could promote experiential tourism activities related to agriculture.

Public authorities play a strategic role in spreading knowledge about local products by making them more recognizable through initiatives that support the territory and local economy. This includes organizing and promoting fairs and events, as well as fostering a network among sector stakeholders. Such a network could facilitate information sharing and strengthen cooperative relationships, which are essential for the craft beer industry (Amoriello, 2016; Carbone, 2016). For the Pedemontana Veneta beer road, promoting collaboration among craft beer stakeholders to create diverse itineraries that include outdoor activities, cultural sites, and dining experiences could enhance its attraction as a tourist destination. This approach could position Vicenza and similar regions as recognized craft beer hotspots. The study also offers valuable insights for DMOs and tourism professionals, highlighting the importance of targeting specific psychographic segments. Conducting audits of local resources and attractions would help identify unique offerings, allowing for more tailored marketing based on Plog's tourist profiles.

This study examined the consumer profile and motivations for visiting a craft beer road, contributing to the growing research on craft beer tourism in Italy. The socio-demographic profile of potential craft beer road visitors was in line with existing studies on craft beer consumers, except for gender. Moreover, the analysis on questionnaire results revealed that allocentric types, as described by Plog's (1974) tourist psychographic model, have more intention to visit craft beer roads. These tourists seek out early-stage destinations, aligning with the current developmental phase of the PV beer road and supporting Plog's theory. Allocentric types, though a smaller tourist segment, are the first to explore less-developed locations and enjoy diverse activities, including new food and drink experiences. Given that over half of Europeans plan to explore lesser-known destinations within countries they will visit (European Travel Commission, 2024), the allocentric typology findings of this study may support a larger shift in traveler typology toward allocentricity.

The combination of craft beer and experiential tourism emerged as an important opportunity for craft beer roads. Results from the consumer questionnaire showed that experiencing craft beer was a main motivator to visit a craft beer road, even for those who do not drink craft beer. This information, coupled with results showing a more allocentric traveler and specific socio-demographic characteristics reveal a potential craft beer consumer profile. There appears to be a high level of consumer interest in craft beer roads but low awareness of them as a tourist offer as demonstrated by this study's questionnaire results. A main question going forward in craft beer tourism studies involving craft beer roads will be to determine whether craft beer producers have enough incentive and support to join craft beer roads as a tourism product. And, if so, it will be important to gain clarity of what interventions could be done to create a successful craft beer road initiative.

Finally, looking to examples of successful craft beer roads abroad, as well as Italy's Apecchio, Città della Birra (Apecchio, the Beer City) could be helpful in paving a way forward for development of craft beer roads in Italy. While each town and region have a unique context that may look a little different in terms of tourism objectives, a general framework could be identified and developed for craft beer. Italian communities have the potential to offer consumers authentic, location-specific craft beer experiences that contribute to regional identity and economic development.

5.2 Study limitations

The small sample size of this research was not able to capture a strong representation of craft beer road consumers in Italy. With a larger number of questionnaire respondents, (possibly representatives of larger groups of people), stronger relationships between the variables could have been established. An important limitation pertains to this lack of generalizability of the questionnaire results to the whole Vicenza province and the rest of the region. Additionally, some of the questionnaires were delivered according to a sort of snowballing sampling, starting with some friends and acquaintances, which meant that the sample tended to be in the same socio-demographic of the author. The lack of longitudinal data in this study also limits the understanding of the consumer of craft beer roads. If consumer preferences, intentions, and motivations regarding craft beer roads were tracked at different time periods, more insight could be provided about the consumer as a stakeholder in craft beer tourism. Because craft beer roads are a relatively new tourism offer in Italy (compared to wine roads) more consumer studies could be a future aim of the sector to assist in craft beer road development.

Questionnaire results showed that respondents were considered more allocentric based on Likert responses to a set of different statements. However, it is uncertain whether intended behavior will be the same as actual behavior. For instance, though many respondents prefer a novel, non-touristy destination they may decide to visit a more developed, well-known destination for many reasons (cost, distance, and family obligations) to name few. Furthermore, the CA was created for two groups to obtain meaningful data related to the allocentric-psychocentric continuum. According to Plog's (1974) theory, most tourists fall into the mid-centric category with only approximately 4% in the allocentric category (see Figure 2.1). If segmentation of the 16 Plog-based statements were done on 3 or 6 psychographic types along the spectrum, it is possible that there would be fewer allocentric types which would weaken the argument that potential craft beer road consumers were predominantly allocentric. Nonetheless, responses for other sections of the questionnaire tended towards allocentric typology based on mean Likert scale scores for motivations and preferences. This reinforces the overall results showing a relationship between intent to visit a craft beer road and potential consumers with allocentric typology.

5.3 Future research

Future research could enhance understanding of Italian craft beer roads as tools for regional tourism development by investigating other craft beer tourism stakeholders. For example, interviews with craft beer producers could reveal why PV craft beer road breweries show limited collaboration and prioritize marketing as a tourist offer less. Additionally, surveying local government tourism officials and private tourism companies in Vicenza could clarify shared objectives for successful regional tourism initiatives. Investigating how consumers learn about craft beer tourism could be another worthwhile study and provide clarity on the most effective marketing and promotional channels. Being that European travelers primarily plan vacations using travel websites, online search engines, and online maps this could be a start for investigating possible ways for craft beer roads to engage in tourism activities (European Travel Commission, 2024). Finally, researching the appeal of craft beer tourism such as craft beer roads by domestic (Italian) versus international tourists may be interesting to inform decisions about segmenting tourists based on distance that they travel. For Italian tourists planning to travel within their country in 2024, most trips involved culture and heritage, whereas for all European travelers, natural landscapes and gastronomic experiences were the most frequent types of trips (European Travel Commission, 2024). Exploring different tourist segments' interests could shape future tourism managers decisions about what types of activities to pair with craft beer roads.

The combination of food and beer in craft beer tourism seems to have a promising outlook. Research could be done on the pairing of local foods with beer at festivals, or with classes offered at breweries. Partnerships in general could be investigated, like those between breweries, outdoor recreation companies, and local food producers. By involving roads in other tourist activities, more collaborations are possible. With a larger tourism network, craft breweries may have the potential to attract more visitors, gain more influence, and better position themselves in the local tourism market.

Finally, successful Italian wine routes could provide a model for craft beer road development. Studying the integration of Italian wine routes that have successfully linked local wines with culture and rural tourism may help in creating a framework for organization and promotion of experiential routes for craft beer.

Appendix A. Consumer Questionnaire

This questionnaire is being conducted as part of a Master's thesis on Italian craft beer roads and consumer motivations. The questionnaire should only take a few minutes. Your responses are completely anonymous and will only be used for the academic research purposes. Thank you for your time and consideration.

I consent to the processing of my personal data for the purposes of scientific research and evaluation of this student thesis.

Acconsento al trattamento dei miei dati personali per finalità di ricerca scientifica e valutazione di questa tesi di laurea.

○ Yes

○ No

Definitions

Craft beer: Beer that is produced by small independent breweries and not subjected to microfiltration or pasteurization processes.

Craft beer road: A collaboration of craft breweries, located in close proximity to each other, and often involving joint marketing efforts to promote beer consumption as a tourist activity.

Pedemontana Veneta beer road: A collaboration of craft breweries in the Vicenza province that include the following 17 breweries:

Birrone	Birrificio Pasubio	Birrifico Agricolo Sorio
Lucky Brews	Groove Birrifico Independente	Birrifico Veneto
Birracrua	Birra Barbieri	Birrificio Artigianale Ofelia
Labi Beer	Birrificio Agricolo Due Valli	Ceer Beer
Luppoland	The Ugly Sheep Brewery	Siemàn
La Villana	Skinny Hill	

Q1 Are you a beer drinker?

- ◯ Yes
- ◯ No

Q2 Are you a craft beer drinker?

- ◯ Yes
- ◯ No

Q3 Have you ever visited a craft beer road?

- ◯ Yes
- ◯ No

Q4 If no, do you intend to visit?

- ◯ Yes
- ◯ No

Q5 How much do you agree with the following statements?

	Strongly disagree (1)	Somewhat diagree (2)	Undecided (3)	Agree (4)	Strongly agree (5)
I prefer to visit places that have mostly been undiscovered, especially before hotels and restaurants have been built	○	○	○	○	○
I can make decisions quickly and easily	○	○	○	○	○
I have more energy than most people my age	○	○	○	○	○
I am actively doing a rigorous exercise program	○	○	○	○	○

Q6 How likely is it that you would take the following type of vacation?

	Not at all (1)	Slightly (2)	Moderately (3)	Very (4)	Extremely (5)
I would like to travel to a novel, non-touristy location where there may not be many hotels or restaurants	○	○	○	○	○
I would like to travel to a place that is familiar where there are many hotels and shops to purchase souvenirs, and possibly join a group tour	○	○	○	○	○

Q7 To what degree do each of the following factors motivate you to travel?

	Not at all (1)	Slightly (2)	Moderately (3)	Very (4)	Extremely (5)
To try out new food and drink that I haven't had before	○	○	○	○	○
To visit destinations with a well-established tourism industry	○	○	○	○	○
To experience how the local community lives	○	○	○	○	○
The ability to visit a destination in a short amount of time	○	○	○	○	○

Q8 How much do you agree that you have the following personality traits?

	Strongly disagree (1)	Somewhat disagree (2)	Undecided (3)	Somewhat agree (4)	Strongly agree (5)
I am curious	○	○	○	○	○
I am cautious	○	○	○	○	○
I seek out new experiences	○	○	○	○	○
I prefer to have repeat experiences	○	○	○	○	○
I prefer to try new products	○	○	○	○	○
I prefer to have products that I am familiar with	○	○	○	○	○

Q9 Did you know about the Pedemontana Veneta beer road before today?

○ Yes

○ No

Q10 If yes, how did you hear about it?

- ◯ Word of mouth
- ◯ Internet / social media
- ◯ Signage or brochure
- ◯ Local fair or event
- ◯ Other

Q11 If yes, have you seen the following signage or logo for the Pedemontana Veneta beer road?

- ◯ Yes
- ◯ No

Q12 Have you heard of the Birrifici Aperti event that happens in May for the Pedemontana Veneta beer road breweries?

- ◯ Yes
- ◯ No

Q13 How much would each of the following factors motivate you to visit the Pedemontana Veneta beer road?

	Not at all (1)	Slightly (2)	Moderately (3)	Very (4)	Extremely (5)
Distance from your home	○	○	○	○	○
Availability of a wide variety of food	○	○	○	○	○
Activities near the brewery such as outdoor recreation or cultural / historical sites	○	○	○	○	○
Transportation arranged to take you to and from breweries	○	○	○	○	○
A large variety of beer styles to try	○	○	○	○	○
The option to see live music / other entertainment	○	○	○	○	○

Q14 In regards to a craft beer road, how important are the following aspects when deciding to visit a craft brewery?

	Not at all (1)	Slightly (2)	Moderately (3)	Very (4)	Extremely (5)
To participate in the craft brewery experience which includes tasting craft beer and/or learning about craft beer	○	○	○	○	○
For enjoyment which includes getting away from home and/or relieving stress	○	○	○	○	○
To socialize which includes getting family and friends together and/or meeting other people with an interest in craft beer	○	○	○	○	○
To drink craft beer and/or buy craft beer to take away	○	○	○	○	○

Q15 What is your gender?

- ◯ Male
- ◯ Female
- ◯ Non-binary / third gender
- ◯ Prefer not to say

Q16 What is your age?

- ◯ 18-25
- ◯ 26-35
- ◯ 36-45
- ◯ 46-55
- ◯ 56-65
- ◯ 65+

Q17 What is your level of education?

- ◯ High School
- ◯ Technical or vocational school
- ◯ College graduate
- ◯ Post-Graduate

Q18 What is your employment status?

- ◯ Student
- ◯ Part-time employment
- ◯ Full-time employment
- ◯ Homemaker
- ◯ Unemployed
- ◯ Retired

Q19 What sector do you work in?

- ◯ Healthcare
- ◯ Education
- ◯ Retail
- ◯ Manufacturing
- ◯ Finance
- ◯ Agriculture
- ◯ Information Technology
- ◯ Food Services
- ◯ Military
- ◯ Tourism / Leisure
- ◯ Wellness / Aesthetics
- ◯ Other sector
- ◯ Not applicable

Q20 How would you describe your household income?

- ◯ Dissatisfied with household income
- ◯ Somewhat dissatisfied with household income
- ◯ Somewhat satisfied with household income
- ◯ Satisfied with household income

Q21 Do you live in a rural or urban community?

- ◯ Rural
- ◯ Urban

Q22 Where do you live?

- ◯ Vicenza province
- ◯ Other province in Veneto region
- ◯ Other region in Italy
- ◯ Country other than Italy

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