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Craft beer as an industry has been growing rapidly across the United States over the past two decades, especially in North Carolina (NC) (North Carolina Brewers Guild, 2011). This growth and interest in the craft beer industry has created an emerging market niche in tourism, beer tourism. The beverage and beer tourism industry is severely lacking in research in areas such as marketing. A study of visitors to North Carolina craft breweries was conducted by the author throughout the state during the fall 2011. This research provides the NC beer industry and the NC tourism industry with much needed information of who visits NC breweries, their motivations, and what marketing stimuli prompted the visit. It was found that there were four main motivational factors for tourists to visit a NC brewery, which can be explained by the push and pull theory (Dann 1977, 1981). These four factors were: craft brewery experience, enjoyment, socialization, and beer consumption. Demographics, psychographics, and preferences were also determined for brewery visitors. This research study also established that there was a viable market for beer tourism in North Carolina. Though it was found that NC has a market for brewery visits, this research did not determine a distinct niche profile for NC beer tourists. This thesis concludes with implications of brewery visitor profiles for marketing including a proposed model of beverage and culinary niche tourism, based upon the results, followed by suggestions of future research.

BEER TOURISM: A VISITOR AND MOTIVATIONAL
PROFILE FOR NORTH CAROLINA
CRAFT BREWERIES

by

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CHAPTER I

INTRODUCTION

Craft beer is a fast growing industry across the United States, especially in North Carolina (NC) (NC Brewers Guild, 2011). A craft brewery is defined as a small, independent brewery that produces 6 million barrels or less of beer annually (Brewers Association, 2011). The United States' (US) overall beer industry sold 203,576,450 barrels (1 barrel = 31 US gallons) of beer in 2010, of which approximately 9,951,956 barrels (about 5%) were sold by craft breweries. The Brewers Association (2011) also reported that in 2010 the number of craft breweries grew by 11% and employed an estimated 100,000 people in the US. In 2010, there were 1,759 breweries in operation; 1,716 (98%) of them are craft breweries. The remainders were approximately 20 large non-craft breweries such as Anheuser-Busch and MillerCoors Brewing Company, which produced more than 6 million barrels per year and 23 "other" types of breweries (Brewers Association, 2011). North Carolina is a leader of beer production in the southeast, outranking all other states in the south with 58 breweries, 21 brewpubs, and 37 production breweries as of January 2012 (Bassett, 2012; Grillo, 2008; Papazian, 2009, Rada, 2011). Repeatedly, NC breweries (the term NC craft breweries herein will be referred to as NC breweries) also have won awards for their high quality beer at competitions such as the Great American Beer Festival and the World Beer Cup® (Rada, 2011).

Due to the number and quality of breweries in the state, North Carolina has been recognized as a craft beer lover's destination (Bassett, 2012). The Triangle area (located in central NC and made up of Raleigh, Durham, and Chapel Hill) and the Asheville area (located in the mountains) have the highest concentration of breweries in the state (NC Brewers Guild, 2011). Not surprisingly, the state's Brewers Guild (NC Brewers Guild) is one of the fastest growing and largest guilds in the United States (NC Brewers Guild, 2011). Asheville, in particular, has put NC's craft beer in the spotlight by being named "Beer City USA" in 2010 and 2011 (Krug, 2010). Papazian (2009) asserts that Asheville is an "American beer Mecca" and that it is worth the trip to visit and taste at the local brews.

NC first legalized microbreweries in 1985 (Farm Bureau, 2009), with the majority opening since 2005, thus, the craft beer industry and the beer tourism industry are both in relatively early stages of development. The NC beer industry has been referred to as "the state's hottest new industry" (Chappell, 2011). The North Carolina tourism industry has begun to promote the craft beer industry and beer tourism by presenting a variety of NC beer to taste during press trips, media missions, and other marketing events (Tuttell, 2012). In 2011, the North Carolina Official Travel Guide featured an article highlighting this new beer tourism niche as well as a fall 2011 advertising campaign (Rada, 2011, Tuttell, 2012).

Beer tourism is a niche tourism market. The term "niche tourism" refers to designing a specific destination to meet the motivations of a certain group or market segment (Robinson & Novelli, 2005). Niche tourism also focuses on an individual's

interests and travel desires, making the destination more unique and marketable. An understanding of the beer tourism niche is important in order to be able to successfully market to those who have this interest. More specifically, an understanding of who visits craft breweries and what motivates them to visit will assist craft breweries and tourism professionals in effectively promoting this new tourism niche. Therefore, the purpose of this study was to enhance the North Carolina beer and tourism industries' knowledge of NC craft breweries visitors and why, as well as determining marketing strategies that prompted visitors to visit a NC brewery.

A thorough review of the literature resulted in little research regarding beverage and beer tourism. The majority of the literature found focused on wine tourism, which is often regarded as a part of culinary tourism. Rivera, Chandler, and Winslow (2010) conducted a study to develop a profile of NC wine tourists, by surveying attendees at a NC wine festival. The demographics and psychographic (preferences and attitudes of the visitors) findings indicated that the majority of the festival attendees were women between the ages of 50 – 59. Park, Reisinger, and Kang (2008) studied the motivation of wine tourists by surveying attendees at a Florida wine festival. They found the majority of attendees of this wine festival were also female; however, the majority was between the ages of 20 – 29. Park et al. (2008) found that the “top seven factors that motivated first-time visitors to the festival were the desire to taste new wine and food, enjoy the event, enhance social status, escape from routine life, meet new people, spend time with family, and get to know the celebrity chefs and wine experts” (p. 161).

Plummer, Telfer, Hashimoto, and Summers (2005) investigated beer tourism along the Waterloo-Wellington Ale Trail in Canada. This research reported a visitor profile of beer tourists in this region, the marketing strategy that prompted their visit, and the visitor's experience of the Ale Trail. Plummer et al. (2005) found that majority of beer tourists to the Ale Trail were under the age of 30 and most were male, which differs from what was found the profiles of wine tourists. They also found that the most frequently observed form of marketing was word-of-mouth and road signs observed while visitors were passing through. The fact that this article is a seminal piece of the literature on beer tourism indicates that there needs to be more examination of this growing industry. Therefore, to enhance the body of literature, the purpose of this research is to: 1) determine who visits NC breweries, 2) develop a profile of tourists to NC breweries (including a beer tourist profile), 3) examine the factors that motivate a tourist to visit a NC brewery, and 4) identify the marketing strategies which were most effective in bringing visitors to NC craft breweries.

Research Questions

- What are the demographics of visitors to NC breweries?
- What are the demographics of tourists to NC breweries, including beer tourists?
- What are the characteristics and psychographics (preferences and attitudes) of visitors to NC breweries?
- What are the motivational factors for tourists to NC breweries?

- What marketing strategies which were most effective in bringing visitors to NC craft breweries?

Definition of Key Terms

Tourism.

Tourism is defined as “the processes, activities, and outcomes arising from the relationships and the interactions among tourists, tourism suppliers, host governments, host communities, and surrounding environments that are involved in the attracting and host of visitors” (Goeldner & Ritchie, 2006, p. 5).

Tourist.

For the purpose of this study, sample subjects who visited a NC craft brewery and answered “no” to the survey question “are you a resident of the community in which the brewery is located” will be referred to as a tourist to the brewery.

Niche tourism.

The term “niche tourism” refers to designing a specific destination to meet the motivations of a certain group or market segment (Robinson & Novelli, 2005). Niche tourism also focuses on an individual’s interests and travel desires, in addition to making a destination more unique and marketable.

Beer tourism.

This is tourism that results when a visitor’s primary motivation to travel is to visit a brewery, beer festival, or beer show to experience the beer-making process and/or tasting of beer (Plummer et al., 2005).

Beer focused tourists.

For the purpose of this study, a beer focused tourists is a respondent who answered “no” to the survey question, “are you a resident of the community in which this brewery is located,” and answered “yes” to the survey question, “is visiting this/a brewery the main reason why you are visiting this community?”

Non-beer focused tourists.

For the purpose of this study, a beer focused tourists is a respondent who answered “no” to the survey question, “are you a resident of the community in which this brewery is located,” and answered “no” to the survey question, “is visiting this/a brewery the main reason why you are visiting this community?”

Craft brewery.

A craft brewery is defined as a small, independent brewery that produces 6 million barrels or less of beer annually (Brewers Association, 2011). The craft beer industry consists of four markets: “brewpubs, microbreweries, regional craft breweries, and contract brewing companies.” (Brewers Association, 2011) A brewpub is both a brewery and a restaurant that sells at least 25% of its beer onsite. A microbrewery produces 15,000 barrels of beer or less per year, a third or more of which is sold offsite. A regional brewery produces between 15,000 and 6 million barrels annually. Finally, a contract brewing company is a company (can be a brewery) that hires a different brewery to brew and bottle beer for it. For the purpose of this study, microbreweries, regional breweries, and contract breweries will be labeled as production breweries.

CHAPTER II

REVIEW OF THE LITERATURE

Introduction

To begin any research endeavor it is essential that the underlying research and literature be identified and understood. Included in this review of the literature were topics related to tourism and niche tourism, which leads more specifically to a discussion of culinary and beverage tourism. A benefit that niche tourism offers managers is the ability to market to specific customers (Robinson & Novelli, 2005). For this type of niche marketing to be effective, managers must understand basic information about the customers, including their motivations, demographics, and psychographics. Therefore, to accomplish the purpose of this study, a discussion of tourism motivations and marketing was also required. This literature review ultimately focuses on beer tourism which is defined as tourism that results when a visitor's primary motivation to travel is to go to a brewery, beer festival, or beer show to experience the beer-making process and/or tasting of beer (Plummer et al., 2005).

Tourism and Niche Tourism

The travel and tourism industry is one of the largest industries in the US and the world and continues to grow (Goeldner & Ritchie, 2006; Obama, 2012; U.S Travel Association, 2011; United Nations World Tourism Organization, 2011). According to the UNWTO (2011), tourism is linked to the development of many sources of income for

an area, making it a significant contributor to international commerce. In 2010, receipts from international and domestic travel spending in the US was US \$758.7 billion (US Travel Association, 2011). The commodification of tourism has made traveling a social norm and an everyday occurrence (Cohen, 1984; Goeldner & Ritchie, 2006). There are many definitions of tourism and tourists. For the purpose of this study, tourism was defined as “the processes, activities, and outcomes arising from the relationships and the interactions among tourists, tourism suppliers, host governments, host communities, and surrounding environments that are involved in the attracting and host of visitors” (Goeldner & Ritchie, 2006, p. 5). Tourism goes deeper than just visiting a destination; it also encompasses the interactions of a variety of stakeholders (e.g., commerce, residents, and hospitality industry) that make the travel industry run (Goeldner & Ritchie, 2006).

According to a number of authors (Cohen, 1984; Goeldner & Ritchie, 2006; Novelli, 2005) there are various types of tourism. In the broadest sense, there is leisure or pleasure tourism and business tourism (Cohen, 1984). Leisure tourism includes activities such as visiting family and friends, going on vacation to Disney World, traveling abroad to visit family for the primary purpose to enjoy oneself. Business tourism involves individuals attending a conference, show or convention, business meetings, sales calls, etc for the primary purpose to conduct business. It is important to note that leisure and business tourism are not mutually exclusive. For example, a business tourist or visitor may also participate in leisure tourism during the same trip (Goeldner & Ritchie, 2006).

According to Robinson and Novelli (2005) there are two different types of tourism activities: niche tourism and mass tourism. Niche tourism has a variety of subdivisions or subtypes, Robinson and Novelli (2005) refer to as macro-niches and micro-niches (see Figure 2.1). A macro-niche the authors define as the larger niche market segments (e.g., rural tourism, sports tourism, environmental tourism) and micro-niches are the larger segments broken down even further and are normally the activities practiced by those in that particular group (e.g., cycling tourism, geo-tourism, gastronomy tourism).



Figure 2.1. Niche Tourism Components . Robinson and Novelli’s two types of tourism activities: niche tourism and mass tourism. Under niche tourism there are a variety of subdivisions Robinson and Novelli calls macro-niches and micro-niches. Robinson, M., & Novelli, M. (2005). Niche tourism: an introduction. *Niche Tourism* (pp. 1-11). Burlington, MA: Elsevier Butterworth-Heinemann

Niche tourism is a reply or a counter to the Fordism of the mass tourism sector. Fordism, in this sense, is a term used to describe a mass process and product that is carried out in the exact same manner again and again, like an assembly line, without concern for the needs or demands of individual or defined groups of customers (Sayer, 1989). The term *niche tourism* refers to designing a specified destination to meet the motivations of a certain group or market segment. Niche tourism focuses on the individual tourist's interests and travel desires making it, the destination, more unique and marketable (Robinson & Novelli, 2005). Some examples of niche or special interest (these two words can be used interchangeably) tourism markets include: photographic tourism, geotourism, youth tourism, dark tourism, genealogy tourism, transportation tourism, and gastronomic tourism (Robinson & Novelli, 2005; Trauer, 2006).

Just as there are various types of tourism, there are various types of tourists. A number of authors (Foster, 1985; Goeldner & Ritchie, 2006) define a tourist as someone who travels away from home and stays overnight at a destination, while an excursionist or same-day visitor travels away from home and does not stay overnight. By contrast, the National Tourism Resources Review Commission further defined a tourist as someone who travels 50 miles or more one way from his or her home, regardless of staying overnight or not (Goeldner & Ritchie, 2006). For the purpose of this study, sample subjects who visited a craft brewery and are not a resident of the community in which the brewery is located will be referred to as a tourists to the brewery.

Many authors have written on the typologies of tourists (i.e. Cohen, 1972; Wickens, 2002). Cohen's typology of the international tourist was one of the first

developed and is still widely used by tourism professionals and educators (Goeldner & Ritchie, 2006). Cohen (1972) proposed there were four types of tourists: the organized mass tourist, the individualized mass tourist, the explorer, and the drifter. The discrete types were ordered sequentially according to the tourist's need and motivation for familiarity with the environment the visitor was in, which Cohen calls the "environmental bubble". The organized mass tourist was the most extreme case of needing familiarity of their home environment. Such tourists buy the packaged-tours and the all inclusive resorts because of the consistency and familiarity they provide. The organized mass tourist prefers everything planned and ready for them. The individualized mass tourists are similar to the organized but desire more control over what they do. They will book vacations through a travel agent but prefer to have input in what they do. The explorer gets off the beaten path as much as they can but still prefer to have a sense of familiarity. At the other end of the continuum from organized mass tourists are the drifters. Drifters may not consider themselves tourists so they try to disassociate themselves from tourist areas, services, and activities. They try to conform to the way the locals live and completely immerse themselves in the local culture. They desire unfamiliar and complex experiences when they travel. With regards to quantity, the organized and individual mass tourists dominate the market and because of this, a large number of destinations cater to a mass tourism market (Cohen, 1972; Wickens, 2002).

Wickens (2002) expanded Cohen's typologies by developing sub-types. His research led to subdividing the "individual mass tourist" into five subsets: (1) "the cultural heritage type" which describes tourists who mostly enjoy the cultural facets of a

destination; (2) the “raver type” which refers to tourists who are more interested in the beach, night clubs, and drinking; (3) the “Shirley Valentine type” which describes tourists who come to a specific location to be romanced by the locals; (4) the “heliolatrous type” who are tourists who seek the sun; and finally (5) the “Lord Byron type” who are tourists who consider themselves closer to locals because they vacation at the same location year after year. The results of this research suggested that one destination could appeal to various types of tourists.

Based on the understanding of niche tourism, some destinations have branded or re-branded themselves to focus on a niche market that fits that destination the best. For example, Conway and Timms (2010) observed that Caribbean tourism leaders directed their marketing efforts towards “slow tourism”. They further discussed the industry leaders’ reasons for directing more of their marketing efforts toward the slow Caribbean lifestyle rather than the mass product of the “Caribbean”. The primary reason for such a strategy was the Caribbean tourism industry desired quality over quantity. The move to promote slow tourism encouraged sustainability, local identity, and a hospitable locale for rest and relaxation. Tourism has long been an essential industry to the Caribbean’s economy; therefore, re-branding was considered necessary for its financial survival.

Marketing Overview

Studying the demographics, psychographics, and motivations of consumers will assist in determining consumer behavior and aid in a developing a successful marketing strategy (Kotler & Armstrong, 2006; Plummer et al., 2005; Rivera et al., 2010; Robinson & Novelli, 2005). Finding a company’s or industry’s proper marketing segment, target

market, and marketing position are important in order to maximize exposure, maximize strategic advantage over its competitors, and to minimize financial misuse (Kotler & Armstrong, 2006). Segmenting a market is dividing the market into “smaller groups based on specific characteristics...segmentation assumes people are different and that the differences are related to a specific behavior or attitude” (Byrd & Gustke, 2007, p. 178). The purpose of segmentation is to identify specific profitable market clusters of an industry, develop products and services to meet consumer’s needs or wants, and market to them with relevant communications. To have an effective market segment there are five requirements; the segment must to be: measurable (e.g., amount of consumer interest), accessible, substantial (beneficial to supply the product/service), differentiable, and actionable (e.g., useful programs) (Kotler & Armstrong, 2006).

Kotler and Armstrong (2006) also stated that loyalty is created when a brand is strong, thus is competitive in the industry and has brand equity. This means that consumers know the brand and recognize the product, and ultimately purchasing that product. Businesses want to create brand equity and brand loyalty in order to be competitive.

Fountain, Fish, and Charters’ (2008) research suggested that wine tourism promoted and encouraged brand loyalty. The authors agree that opening the cellar’s doors to visitors will create brand loyalty through creating a memorable experience and an emotional connection with the brand. This connection will result in repeat visitation and additional product consumption. The authors found that providing not only the “tangible” product (e.g., bottle of wine), the “intangible” experience of quality of service

and personal connection makes the purchase of wine and creating brand loyalty more likely. Additionally, the authors found that after purchasing a bottle of wine at a winery, customers consumed the wine with friends and family as well as shared their positive experience, consequently created an opportunity for word-of-mouth (WOM) advertising. WOM is a very powerful form of marketing and has a considerable positive or negative effect on products (Kotler & Armstrong, 2006). Because of its customer service nature, this especially holds true for the tourism industry (Prebensen, Skallerud, & Chen, 2010).

Motivation Overview

An understanding of a tourism niche is important in order to be able to successfully differentiate a destination from its competitors. More specifically, an understanding of who visits (i.e. demographics and psychographic characteristics) and what motivates them to visit will assist marketers in more effectively promoting the destination's attributes and benefits. Determining what motivates and drives a consumer is an important component of developing a marketing strategy to grow an industry. Consumer's buying decisions are heavily influenced by a person's subconscious motivates (Kotler & Armstrong, 2006).

Motivational theories.

Dann (1981) and Iso-Ahola (1982) defined motivation as the "psychological/biological needs and wants that arouse, direct, and integrate a person's behavior and activity" (Park et al., 2008). These internal needs and wants drive people to travel and experience new things. According to Park et al. (2008), three main tourism motivational theories are the push/pull theory (Dann, 1977, 1981), Maslow's hierarchy of

needs (Maslow, 1943, 1954), and Iso-Ahola's (1982) escape-seeking theory. In addition to these three theories, authors who conduct research related to beverage tourism have also used the self-determination theory (White & Thompson, 2009). Generally, because of its palpability, the push/pull theory has been recognized as the foremost motivational theory for tourism and specifically beverage tourism (Kim, Goh, & Yuan, 2010; Park et al., 2008; Smith & Costello, 2009; White & Thompson, 2009).

Dann (1977, 1981) defined the push factor as the internal want for an escape of the everyday environment (e.g., work and home), relaxation, and other psychological forces. The push factor creates the desire to travel (Park et al., 2008). "Push factors identified include anomie and ego-enhancement. Anomie refers to a situation of perceived normlessness and meaninglessness in the origin society. Ego-enhancement is usually associated with relative status deprivation in the individual" (Dann, 1981, p. 191). Dann (1977, 1981) also defined the pull factor as the physical, external answer to the internal push (e.g., a resort that offers sunshine, spa services, climate, etc.) Pull factors impact the tourist's decision of which destination to visit (Smith & Costello, 2009). For example, a visitor's internal push to experience new tastes and experiences is satisfied by the pull of a NC brewery providing brewery tours and a variety of beer selections. There is also a social aspect that the push/pull theory is used to explain. For example, a brewery's facility (pull factor) can provide an environment for visitors to meet new people and/or be with friends and family (push factor).

Another motivational theory tourism professionals utilize to explain internal needs is Maslow's hierarchy of needs. Maslow (1954) explained that in general a human

has a 'hierarchy of needs' that when the base need, the physiological needs such as food, is met, then the next need can be focused on. Maslow's hierarchy of needs are presented in a pyramid; the base of the pyramid (physiological needs) being the most basic need. After the physiological needs come the need for safety, followed by the need for love and belongingness, the need for esteem (e.g., self-esteem, self-achievement, and status), the need for self-actualization. Once a person's physiological needs are satisfied and gratified, they move on the next need on the pyramid (safety or security) which motivates the individual's behavior. The need of being social, taste new things, and learn more are also a part of the hierarchy, and these needs can be used as a push factor to travel. Niche tourism (e.g., beer tourism) narrows the gap of satisfy these needs even more by pin pointing each individual interest.

Another motivational theory used in beverage tourism is the escape-seeking theory. Iso-Ahola (1982) stated that motivation is a psychological concept that has been studied for years by psychologists. Iso-Ahola declared that a motive is an internal response and directive of a person's behavior to achieve satisfaction. He further said "satisfaction that individuals expect to derive from involvement in a leisure activity is linked to two motivational forces: approach (seeking) and avoidance (escape)" (Iso-Ahola, 1982, p. 258). The tourists (or those seeking a leisure activity outside their normal environment) want to 'escape' their everyday routine and experience something different by 'seeking' out the intrinsic rewards through their travel as experiencing something new. Though these two components may be balanced differently in each individual, the two components are always present in every human being.

In trying to determine the motivation to travel, it is important to examine the psychographic, demographic, and socio-graphic characteristics of a tourist. These different characteristics support typologies such as Plog's allocentric or psychocentric typologies (Harrill & Potts, 2002). In addition, determining tourists' motivations are very important in terms of marketing. "Motivations are measured in order to identify and segment types of tourists for the purpose of product development and promotion" (Smith & Costello, 2009, p. 45). Successful marketing is unrealistic without understanding, categorizing, and prioritizing consumers' motivation (Park et al., 2008). Segmenting tourists assists in the development a marketing strategy for a destination or niche market by focusing on what the people who constitute the segment want and need.

Culinary Tourism

As discussed previously, there are numerous types of niche tourism (see Figure 2.1). Exploring cultures' unique foods has long been a key ingredient to tourism worldwide (Tikkanen, 2007). Culinary tourism continues to be a popular and successful niche segment in the industry (Robinson & Novelli, 2005). Destinations recognize culinary tourism as an important motivator for tourists and continue to work hard at enhancing their culinary scenes (e.g., Butts, 2012; Explore Asheville, 2012). Tourists engage in culinary tourism to experience the authenticity and tastes of a certain culture's cuisine. Often the food and drinks of a culture are the most unforgettable part of a visitor's trip (Cohen & Avieli, 2004; Hall & Mitchell, 2005; Karim & Chi, 2010).

Similar terms associated with this niche would be food tourism and gastronomy tourism (for the purpose of this discussion, all will be referred to as culinary tourism).

The terms listed are all synonyms in meaning in that people travel to a particular destination to experience the unique foods of that destination. However, not every trip to a restaurant should be considered culinary tourism. Culinary tourism is the desire to travel to eat something in specific; it is the main motivator to travel (Hall & Mitchell, 2005; Karim & Chi, 2010). Plummer et al. (2005) stated that through food and beverage tourism the visitor and host culture are brought closer together (p. 447). Meaning, the tourists experience a deep connection with the host culture through the love and interest of its food.

Karim and Chi (2010) explored the relationship between food image (the idea of what a visitor thinks about food in a certain destination) and visitors' intentions to travel to the destination. The authors conducted an online survey to examine the popular cuisines of France, Italy, and Thailand. They looked at the destinations' food image, respondents' travel intentions to those destinations, marketing information source, and those sources' influence on the tourists' decision-making. It was found that there was a strong relationship between a high food image and an individual's likelihood of visiting a particular destination for its food. In this study, Italy had the highest food image and highest visit intention of the three countries. Karim and Chi (2010) found that food was a key factor in motivating tourists to visit Italy because food was a major component in the Italian lifestyle and culture. The authors further determined that from a traveler's perspective, each destination had its own food image and was equivalent to the actual perceived image of the destination (Karim & Chi, 2010).

Beverage Tourism

Beverage tourism is similar to culinary tourism except rather than traveling for food, visitors travel for a certain beverage (Plummer et al., 2005). According to Plummer et al. (2005), wine tourism is the prominent type of beverage tourism discussed in the literature. There is an abundance of literature (Evans, Pollard, & Holder, 2007; Hall & Mitchell, 2005; Howley & Van Westering, 2008; Rivera et al., 2010; Sharples, 2002; White & Thompson, 2009) focused on wine tourism in many countries (e.g., United States, Italy, Australia, Canada, New Zealand, England).

Howley and Van Westering (2008) conducted a study of British vineyard owners and their attitudes and opinions towards wine tourism in their region of England. According to the respondents, the number of tourists who travel to Britain only to visit vineyards and view the wine production process was decreasing. The researchers discovered that vineyards that had additional attractions saw an increase in tourism. Some examples of attractions were art exhibitions, meeting spaces, restaurants, and concert space. It was also determined that including a visit to a vineyard, as part of organized tour itineraries, helped increase the number of visitors to the winery. Lastly, this study revealed staffing to be a major contrast between large vineyard producers and small. The large vineyards had the ability to employ tour guides and other staff members and thus encouraged tourists to visit. Since small vineyard owners had to do everything themselves, they tended to move away from allowing visitors to their winery (Howley & Van Westering, 2008).

In addition to wine, more recent studies (i.e. Jolliffe & Aslam, 2009; McBoyle & McBoyle, 2008; Plummer et al., 2005; Spracklen, 2011) have examined whisky and bourbon tourism, tea tourism, sake tourism, and beer tourism. In Scotland, whisky tourism has grown to be popular since the 1960s. Similar to that of a wine tourism, Scotland whisky tourism promotes visitors to their onsite facility in order to increase the brand. McBoyle and McBoyle (2008) concluded at the success of special interest whisky tourism (e.g., connoisseur tours, whisky schools, and the Classic Malts Cruise) has enhanced Scotland's tourism capital. Scottish distilleries have become very innovative in marketing their tours, schools, and the Classic Malt Cruise ending in an increased visibility in Scotland tourism marketing. The authors also conclude that the simple action of coming to the distillery is not enough to create a loyal consumer. Success of the distilleries ability to create brand loyalty depends upon the emotional connection that is established while the visitor is onsite.

As previously mentioned, some researchers consider beverage tourism, such as tea tourism, to be a form of heritage tourism (Goeldner & Ritchie, 2006; Jolliffe & Aslam, 2009). Research done by Jolliffe and Aslam (2009) focused on Sri Lanka's history and heritage of tea and its relationship with tourism. Visitors to tea suppliers, gardens, plantations, factories, museums, exhibits, and events were all considered part of this region's tea tourism. Further, the research found that there was a market for tea heritage tourism in Sri Lanka. There was already a presence of this niche tourism provided by the tea accommodations, such as tea bungalows, tea centers that provided a market for tourist to buy tea products, and tea factories that provide tours. Lastly, the

study indicated that tea heritage tourism could potentially help re-establish and protect historical establishments and customs of Sri Lanka's tea legacy by developing more interest in the art of tea making.

Beer Tourism

Little research exists regarding beer tourism. This niche market is a relatively new and growing trend in the tourism industry; this is especially true in North Carolina (NC Brewers Guild, 2011). When defining beer tourism, Plummer et al. (2005) stated that a visitor's primary motivation to participate in beer tourism is to visit a brewery, beer festival, or beer show to experience the beer-making process and/or tasting of beer. For the purpose of this study, a beer tourist is someone whose primary reason for visiting a destination is to visit a North Carolina brewery. Those who do not fall into this category are considered a local patron or a non-beer focused tourist.

Plummer et al. (2005) looked at the visitor profile and the visitor experience of the Waterloo/Wellington Ale Trail by surveying visitors to the breweries along the trail. It was found that most of the visitors to the Ale Trail were between the ages of 30 and 50. Most visitors heard about the Ale Trail by word-of-mouth or by walking or driving by the location. Further, it was suggested that the information from this of the research could help the breweries adjust their marketing budgets and signage to the brewery accordingly. For example, the breweries could post signage on key roads to direct the visitor to the brewery. The researchers concluded that almost every visitor to the breweries had a positive experience and suggested that by breweries working and promoting beer tourism together benefits them tremendously by multiplying each

brewery's network and word-of-mouth advertising. Plummer et al. (2005) recommended that the breweries create cooperative marketing materials to bring more tourists to their establishments and also to establish partnerships with outside companies such as restaurants, accommodations, and tour operators. Partnering with outside companies had the potential to benefit both the company and brewery by "enhancing the beer tourism product" (Plummer et al., 2005, p.456).

As mentioned previously, little research has been conducted regarding beer tourism, but there are a number of articles on the topic in such media resources such as *The New York Times* (Holl, 2010a; 2010b), *Time Magazine* (Stein, 2008), *All About Beer Magazine* (Cook, 2002), and a number of other outlets. Some articles focus on North Carolina's counterparts in other states and countries such as Georgia's (Grillo, 2008), Colorado's (Colorado Tourism, 2011), and Virginia's ("Beer Tourism in Virginia," 2008) beer tourism industries and Australia's beer industry (Reeves, 2010).

Summary

The travel and tourism industry is one of the largest industries in the U.S. and the world and is predicted to continue to grow (Goeldner & Ritchie, 2006; U.S Travel Association, 2011; UNWTO, 2011). This industry can be broken down into two groups: mass tourism and niche tourism (Robinson & Novelli, 2005). Beverage tourism, a macro-niche, is a developing tourism niche that has room for improvement. Although beer tourism is increasing in popularity, there has been limited research conducted in this area. Future research must address such topics as developing profiles (e.g., demographic and psychographic characteristics) of individuals who visit breweries and further

understanding what motivates them to visit. Such research can enable tourism and brewery professionals to more efficiently and effectively market beer tourism. Once again, the purpose of this research is to: 1) determine who visits NC breweries, 2) develop a profile of tourists to NC breweries (including a beer tourist profile), 3) examine the factors that motivate a tourist to visit a NC brewery, and 4) identify the marketing strategies which were most effective in bringing visitors to NC craft breweries.

CHAPTER III

METHODOLOGY

Introduction

During the fall of 2011, a study of visitors to North Carolina craft breweries was conducted throughout the state (see Table 3.1). A visitor intercept methodology was employed at each brewery location, where respondents were given the survey instrument to complete and return on site. This chapter will discuss the sampling design, followed by a description of the survey instrument, data collection process, and data analysis steps. Limitations of the methodology will be identified.

Sampling Design

For this study, the population of interest comprised visitors to North Carolina craft breweries. NC breweries statewide were selected, in contrast to a NC beer festival, because of the researchers desire to understand the overall NC beer tourism industry. A convenience sample of visitors to the participating NC breweries was used for this study due to the need for control over the process by brewery staff. In selecting which NC craft breweries that were asked to participate in the research, the author turned to the NC Brewers Guild for assistance. The North Carolina Brewers Guild promotes the production and growth of the beer industry in NC. The NC Brewers Guild provided the researcher with brewery contacts and the support for the research. It was decided by the researcher that breweries that are licensed with the Alcoholic Beverage Control (ABC)

Commission at the time of the research were chosen to be contacted about participating in the research (see Appendix A). Out of the 56 total breweries licensed with the ABC Commission (“North Carolina Breweries,” 2011) during the data collection period, 55 were considered craft breweries. Of the 55 craft breweries, eight breweries were closed for various reasons (e.g., renovations) or did not allow visitors. In addition, the breweries that have a license for multiple locations were counted as one, which included four breweries (e.g., Natty Greens has three licensed locations). This left the researcher with 43 breweries to include in the survey.

An email describing the details and need for this research was sent to the 43 NC craft breweries determined previously. The researcher also followed up with a phone call to each of the potential brewery contacts. Three of the 43 did not return the researcher’s phone calls or emails during the initial search for willing breweries thus reducing the potential set of participating breweries to 40 in total. Brewery contacts were given details of the research, and then asked if they would be willing to participate in the research. If yes, depending on the wishes of the brewery contact, the researcher set up a time to visit the brewery with the supplied printed surveys, or sent the surveys by mail.

Those breweries that wanted the researcher to visit were visited during the month of September 2011. The purpose of the visit was three fold: to introduce the researcher to the contact of the brewery, distribute the survey tool, and teach the contact and/or staff the correct procedures and protocol for disseminating the survey. The previous information was articulated by phone to the contacts at the breweries that were not visited by the researcher. All brewery contacts were emailed or given written instructions (see

Appendix B and Appendix C). A reminder email, text, or phone call was also executed the day before the data collection period began.

Depending on the size of the brewery and visitors' interest (e.g., a larger more established brewery draws more visitors than a small newer brewery), brewery contacts were provided with 30 to 50 surveys; in total 1770 instruments were supplied to breweries for data collection. Brewery contacts were also provided with a PDF version of the survey in case they ran out of surveys and needed to print more. During the month of October 2011, brewery contacts distributed surveys at their convenience to willing brewery visitors. During this one-month period, 523 valid surveys were collected from 20 of the 40 breweries (see Table 3.1). For various reasons, such as the popular reason "too busy and forgot", half of the targeted breweries ultimately did not give out the provided surveys. Since breweries did not track surveys handed out, no response rate is available for this data collection process.

Table 3.1. Survey return inventory

Brewery name	Number of surveys returned
Ass Clown	4
Big Boss	71
Carolina Brewery (both locations)	57
Carolina Brewing Co	21
Foothills	46
Four Friends	8
French Broad	33
Front Street	10
Full Steam	19
Highland	42
Lexington Ave	6
Liberty	32

Lonerider	25
Natty Greens (both locations)	48
Pisgah	9
Red Oak	40
Southern App	17
Top of the Hill	4
Triangle	27
Weeping Radish	4
Total number of surveys	523
Total number of breweries	20

Instrument

A questionnaire was developed to collect the data for this study (see Appendix D). To insure content validity, the questionnaire was developed based on previous wine and beer research; items were adapted related to visitor demographics, characteristics and motivations from multiple sources, (e.g., Park et al., 2008; Plummer et al., 2005; Rivera et al., 2010). Wine question items were modified to fit the context of visitation to craft breweries (e.g., “to taste new wines” was changed to “to taste new beers”). The researcher also met with the NC Brewers Guild and beer industry professionals to develop additional questions.

The survey included nine questions regarding demographics of the respondent (e.g., gender, age, education level); five questions providing travel behavior, 10 psychographics questions (e.g., travel preference); 15 questions supplying marketing information (e.g., how the visitor heard about the brewery, is merchandise important to the visitor); and 18 questions about motivational information (e.g., is the visitor at the brewery motivated by factors such as to buy beer, to eat, to be with friends or family).

To establish face validity, the survey was sent to faculty in the authors' academic department, to members of the NC Brewers Guild, and to a beer industry professional. Based on feedback from these topic experts, further adjustments were made to the survey (e.g., question omission). The survey was then piloted at Natty Greene's Pub & Brewing Company in Greensboro, NC and at a Natty Greene's beer tasting in Raleigh, NC (n = 28). It was found through the pilot test that respondents were wary about the title "Beer Tourism in North Carolina" because they did not consider themselves tourists. The researcher changed the title to "North Carolina Brewery Visitor Study" to offset this concern. The average readability level of the finalized survey was found to be at a 5.5 grade level as indicated by Microsoft Word analytics.

Data collection

Each individual brewery had discretionary control over the manner of distributing surveys to visitors (e.g., giving the surveys out after a food order was placed or to visitors waiting in line for a brewery tour). Brewery staff approached the brewery visitor at a time they deemed appropriate to explain the purpose of the research and then staff asked visitors if they would like to participate by filling out a survey. It is important to note that not all visitors to the breweries were asked to participate, thus making it a convenience sample. If visitors agreed to participate, they were given a questionnaire and the brewery staff explained that the participants' rights, the purpose of the questionnaire, and related incentives were specified in detail on the front page of the questionnaire. Respondents filled out the survey and returned it to the employee; subsequently the employee placed the completed survey in a specified and secure location. Brewery contacts were given a

pre-stamped envelope to facilitate the return of surveys to the researcher. At the end of the survey collection period during November 2011, the researcher also called each brewery contact to prompt survey return. All completed surveys from each brewery were either mailed to the researcher or picked up by the researcher at the end of the distribution period.

In addition to the above distribution method, the researcher provided assistance to breweries that attracted a large number of visitors to their brewery tour. The researcher did this method only once at each of two breweries: Big Boss and Red Oak. The researcher used graduate student volunteers from the University of North Carolina at Greensboro to collect data. The volunteers were trained in data collection procedures such as explaining participants' rights. The researcher oversaw and assisted in data collection, but did not reveal herself as the researcher to avoid bias. Volunteers were given hard copies of the questionnaires, clipboards, and pens. The survey was handed out to participants at specified times according to the wishes of the brewery contact (e.g., before or after brewery tour). Before participants filled out the survey, they were informed of the purpose of the study, and their attention was directed to the letter of consent, which included the purpose of the study, the participants' rights (such as the voluntary nature of their participation), researcher contact, and the incentive. After participants finished filling out the survey, it was handed back to the volunteer then directly placed in a secured location in the possession of the researcher.

As an incentive for all who completed the survey, participants who chose to provide an email address were entered in a drawing to win a gift card to a NC brewpub.

An email address was used solely as a contact method for the winner of the prize. It was determined that once an email was collected, anonymity would be breached. To control this issue, the researcher detached each provided email address before entering data into SPSS. Once the winner was drawn, all email addresses were properly disposed of.

Data analysis

SPSS (Statistical Package for Social Sciences) was used to analyze the data. Descriptive statistics were analyzed to determine the demographics of the brewery visitors including: age, gender, marital status, race, income level, education level, and zip code. Descriptive statistics were also used to investigate and describe a tourist profile, including psychographics, responses to marketing, and motivational information of the brewery visitors. Independent sample t-tests and cross tabulations were also conducted to uncover differences between subgroups of respondents. To identify motivational factors of tourists to NC craft breweries, an exploratory factor analysis with Varimax rotation was conducted. Factor analysis was used to examine a large array of motivational items and then to the underlying motivational factors.

Limitations of the Methods Used

The researcher acknowledges several limitations with this methodological design. First, there was a lack of control over survey distribution due to the need to abide by practices that were convenient to participating breweries, as the latter were primarily focused on customer service and sales goals and not on the research purpose. The need to balance the goals of the data collection site and the goals of the study limited the number of visitors approached during the data collection process. Since the time

budgeted for data collection in this project was limited by resources of time and money to a period of one month, fewer surveys were collected than might be desirable for a study of this nature. Seasonal influences on visitor participation would also arise due to the one-month limit on data collection. For example, because of its seasonal nature and small number of off-season visitors to the coastal breweries, the NC coast is underrepresented compared with the NC mountain region and central NC.

Next, the researcher found that the length of the survey (five pages) fatigued the respondents, which resulted in question omitting. Common feedback from the brewery staff said it was difficult to get people to fill the surveys out due to the length. Another limitation is that beer consumption and possible inebriation could have negatively influenced the respondents' answers. This was anticipated due to the brewery environment but no plausible intervention could be devised to offset this type of potential influence. Finally, as shown in Table 3.1, five breweries (Big Boss, Carolina Brewery, Natty Greens, Foothills, and Highland) represented 50% of the overall survey, which may bias the results.

CHAPTER IV

RESULTS

During October 2011, 523 surveys were collected from visitors to 20 NC breweries. Results of this research are presented in order of demographics and profiles, analysis of brewery visitor behavior and preferences, and additional brewery preferences and motivations for NC brewery visitors. The term *respondents* herein refers to visitors whose answers on the surveys are being analyzed and presented in the following reports and tables. Statistical analysis is also provided on motivational factors of brewery tourists.

Slightly over three-fourths of the respondents (76.9%) were collected from visitors to breweries in the Piedmont region (Triangle, Triad, and the Charlotte area), 20.5% from visitors to breweries in the mountains (Asheville and other mountain areas), and 2.7% from visitors to breweries along the NC coast (see Table 4.1). Sixty-one percent of the surveys were collected from a production brewery while 39% from brewpubs.

Table 4.1. Breakdown of North Carolina Brewery Locations Where Visitor Surveys were Collected

NC Region	NC Regions' further breakdown	n	Percent
Piedmont	Triangle area	243	46.5%
	Triad area	147	28.0%
	Charlotte area	12	2.3%
Mountains	Asheville area	81	15.5%
	Mountains (other than Asheville)	26	5.0%
Coast	Coast	14	2.7%
	Total	523	100%

To better understand the visitors to NC Breweries basic demographic information was obtained. Almost two fifths of the respondents (38%) indicated that they were tourists to the area that the brewery was located. Of those individuals 36.70% indicated that their main purpose for their trip was for the beer (see Figure 4.1). The sample of brewery visitors was examined to determine five categories: 1) overall brewery visitor response, 2) local patrons (defined as residents of the community in which the brewery was located), 3) overall tourists to the brewery (defined as all non-residents of the community in which the brewery was located), 4) beer focused tourists (defined as tourists to the brewery who responded that the brewery was the main reason for traveling), and 5) non-beer focused tourists (defined as tourists to the brewery who responded that the brewery was *not* the main reason for traveling).

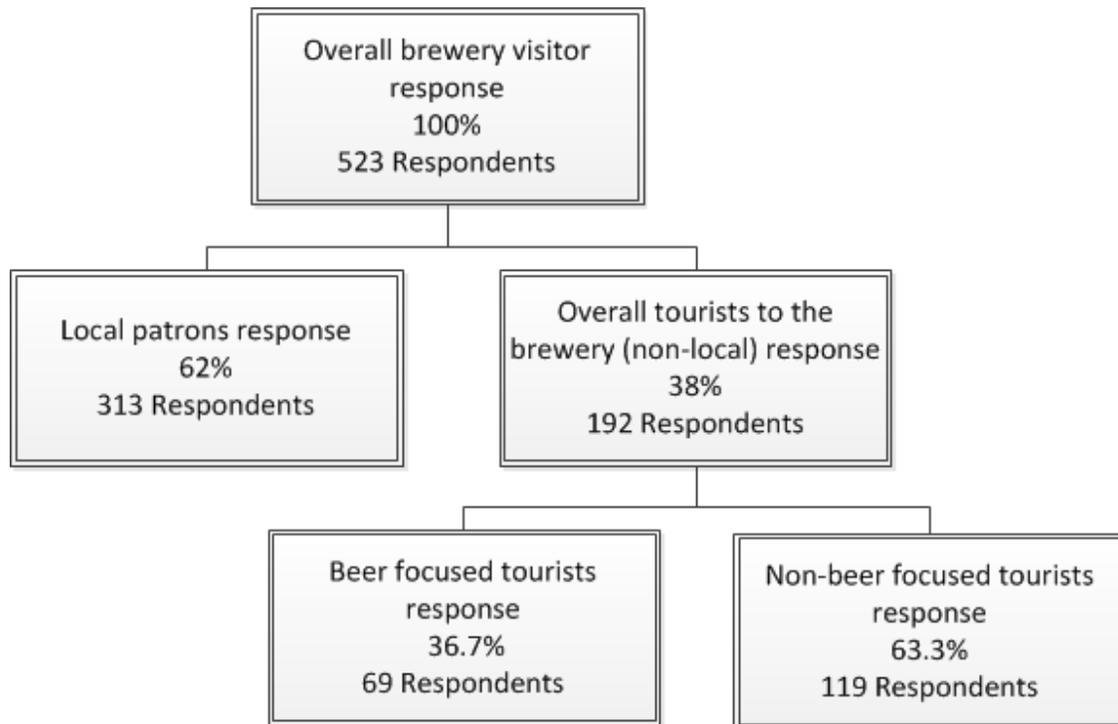


Figure 4.1. Percent of Respondents to North Carolina Breweries by Category. The sample of brewery visitors was examined to determine five categories: 1) overall brewery visitor response, 2) local patrons (defined as residents of the community in which the brewery was located), 3) overall tourists to the brewery (defined as all non-residents of the community in which the brewery was located), 4) beer focused tourists (defined as tourists to the brewery who responded that the brewery was the main reason for traveling), and 5) non-beer focused tourists (defined as tourists to the brewery who responded that the brewery was *not* the main reason for traveling).

Demographics and Profiles

The majority of respondents were male (66%), approaching middle-aged (38.05 \bar{x}), and North Carolinians (81.9%) (see Table 4.2). Additionally, almost half of the respondents reported that they were single (48.3%) and had a bachelors degree or higher (72%). Over two-thirds of the respondents reported that they worked full-time (69.6%) and 32.4% made between \$40,000 – \$79,999 in household income (see Table 4.3).

Table 4.2. Breakdown of Respondents' State of Residence to North Carolina Breweries

State of residence	% of overall brewery visitors state of origin	% of local patrons state of origin	% of tourists state of origin	% of beer focused tourists state of origin	% of non-beer focused tourists state of origin
NC	81.9%	98.4%	53.6%	73.9%	40.3%
SC	3.1%	0.3%	7.8%	8.7%	7.6%
FL	2.5%	0.6%	5.7%	7.2%	5.0%
GA	1.5%		4.2%	1.4%	5.9%
VA	1.3%	0.6%	2.6%	2.9%	2.5%
MI	1.2%		3.1%	0.0%	5.0%
TN, PA	1.0%		2.6%	1.4%	3.4%
MD	1.0%		2.6%	0.0%	4.2%
MA, NY	0.8%		2.1%	0.0%	3.4%
OH	0.6%		1.6%	0.0%	2.5%
CO	0.6%		1.0%	1.4%	0.8%
NJ, IL, VT, IN, International	0.4%		1.0%	0.0%	1.7%
LA	0.2%		0.5%	1.4%	0.0%
NH, TX, CT, MO, DC	0.2%		0.5%	0.0%	0.8%
n	520	313	192	69	119

Local patron profile.

Local patrons comprised 62% of the respondents. The local patrons' demographics mirror the general tendencies of the entire sample. Locals consisted of almost half single (49.7%) and married, male patrons (68.8%), and are approaching middle-aged (38.19 \bar{x}). Locals also reported that 71% completed a bachelor's degree or higher, worked full-time (69.1%) and reported a family household income of \$40,000 – \$79,999 (33.3%), (see Table 4.3).

Table 4.3. Breakdown of Respondents' Demographics to North Carolina Breweries

	Overall brewery visitor response	Local patrons response	Overall tourists to the brewery (non-local) response	Beer focused tourists response	Non-beer focused tourists response
Gender					
Female	34.0%	31.2%	39.3%	39.1%	38.1%
Male	66.0%	68.8%	60.7%	60.9%	61.9%
n	517	308	192	69	118
Age	38.05 \bar{x}	38.19 \bar{x}	38.08 \bar{x}	38.28 \bar{x}	38.27 \bar{x}
SD	13.18	13.05	13.57	12.59	14.27
n	504	300	188	68	116
Marital status					
Single	47.0%	49.7%	43.5%	36.2%	48.3%
Married	46.0%	42.9%	50.3%	59.4%	44.1%
Divorced	0.6%	6.8%	4.7%	4.3%	5.1%
Other	1.0%	0.1%	1.6%	0.0%	2.5%
n	519	310	192	69	118
Education (completed)					
High School	12.3%	11.9%	13.1%	17.4%	10.2%
Associate	14.6%	17.1%	11.5%	21.7%	5.9%
Bachelor Degree	47.3%	47.1%	47.6%	30.4%	56.8%
Master's Degree	18.3%	18.7%	18.8%	24.6%	16.1%
Doctor Degree	6.4%	5.2%	8.9%	5.8%	11.0%
n	519	310	192	69	118
Employment Status					
Student (full time)	9.4%	10.0%	8.9%	8.7%	9.3%
Employed (full-time)	69.6%	69.1%	71.2%	66.7%	72.9%
Employed (part-time)	7.3%	8.0%	5.2%	8.7%	3.4%
Unemployed	3.1%	3.5%	1.6%	2.9%	0.8%
Retired	6.3%	5.5%	7.9%	8.7%	7.6%

Combination	4.2%	3.9%	5.2%	0.0%	5.9%
n	520	311	191	69	118
Household Income					
Less than 39,999	23.4%	25.9%	18.4%	17.2%	18.9%
40,000 – 79,999	32.4%	33.3%	30.2%	34.4%	27.9%
80,000 – 119,999	24.0%	21.4%	29.6%	28.1%	30.6%
120,000 – 159,999	10.2%	11.9%	8.4%	9.4%	7.2%
160,000 - 199,999	4.5%	2.7%	6.1%	4.7%	7.2%
200,000 +	5.5%	4.8%	7.3%	6.3%	8.1%
n	491	294	192	64	111

Tourist to the brewery profile.

Of those who responded, 38% reported that they were not residents of the community in which the brewery was located (non-locals) indicating that they were tourists to the brewery. Of the tourists to the brewery respondents, 53.6% reside in NC (see Table 4.2). Tourists to NC breweries were mostly male (60.7%) and on averaged 38.08 \bar{x} years of age. Half of the respondents were married (50.3%), and three-fourths were considered well educated (75.3% completed a bachelors degree or higher). A majority have stated that they were employed full-time (71.2%) and had a household income of 40,000 - \$79,999 (30.2%) (see Table 4.3). The only statistically significant difference found for demographics was total family income for locals and tourists to the breweries $\chi^2 (5) = .04$. It was found that locals reported a higher household income.

Tourists to NC breweries primarily traveled with friends (26.8%) or their spouse (24.6%) and planned to visit 2.08 \bar{x} breweries while visiting that area. The majority of the tourists stayed overnight (58.8%) for an average of 3.16 \bar{x} nights in a hotel/motel (28.1%) or with a friend or relative (28.1%) (see Table 4.4).

Table 4.4. Tourists to NC Breweries Travel Behavior

	Overall tourists to the brewery (non- local) response	Beer focused tourists response	Non-beer focused tourists response
Brewery is Main Reason for Visiting Area			
Yes	36.7%	100.0%	0.0%
No	63.3%	0.0%	100.0%
n	192	69	119
Number of Breweries Plan to Visit			
	2.08 \bar{x}	1.95 \bar{x}	2.15 \bar{x}
SD	3.15	2.32	3.55
n	180	66	114
Group Profile			
Alone	15.8%	9.0%	19.8%
With relatives only	14.2%	16.4%	12.9%
With a spouse only	24.6%	31.3%	20.7%
With friends only	26.8%	25.4%	27.6%
With relatives and friends	9.3%	13.4%	6.9%
Other	9.3%	4.5%	12.1%
n	192	67	116
Staying Over Night			
Yes	58.5%	30.4%	75.4%
No	41.5%	69.6%	24.6%
n	192	69	118
Average Number of Nights			
	3.16 \bar{x}	3.29 \bar{x}	3.15 \bar{x}
SD	1.74	1.62	1.77
n	108	21	86
Accommodation Used			
Not staying overnight	28.9%	57.1%	14.8%
With friends/relatives	28.1%	7.9%	39.1%
B&B	1.1%	0.0%	1.7%
Hotel or motel	28.1%	20.6%	32.2%
Campground	1.7%	1.6%	1.7%
Other (including rentals)	11.2%	12.7%	10.4%
n	192	63	115

Beer focused tourists' profile.

Of the 38% tourists to the brewery, 36.7% responded that visiting a brewery was the main reason for visiting the area, indicating that they are beer focused tourists. Beer focused tourists parallel that of a tourists profile. NC beer focused tourists were on average 38.27 \bar{x} years of age, mostly 60.9% male, and were well educated (60.8% having a bachelors degree or higher), and married (59.4%). They reported they were employed full-time (66.7%) and 34.4% have a family income between \$40,000 - \$79,999. Majority of NC beer focused tourists were North Carolinians (73.9%) (see Table 4.2 and Table 4.3).

Beer focused tourists, on average, traveled with 3.16 \bar{x} people in their group and traveled primarily with their spouse only (31.3%) or friends only (25.4%). Beer focused tourists planned on visiting 1.95 \bar{x} breweries on their trip. On average, beer focused tourists reported that they have visited 5.59 \bar{x} NC breweries in the past year, not including their current brewery location. Of the beer focused tourists staying overnight (30.4%) the average length of stay was 3.29 \bar{x} nights and 20.6% indicated that they were staying in a hotel or motel (see Table 4.4). A chi-square test was conducted showing the significance for staying overnight $\chi^2(1) = .000$ and where they will be staying $\chi^2(4) = .04$ between beer focused tourists and non-beer focused tourists.

Analysis of Brewery Visitor Behavior and Preferences

Brewery visitors were asked to indicated which brewery activities they planned on participating in and to rate the importance of that activity (see Table 4.5). Brewery visitors number one planned activity was beer purchasing (56.7%), while sampling beer

was reported as the most important brewery activity (4.52 \bar{x}). Results show that beer sampling was a close second (56.1%) planned brewery activity, followed by brewery tour (40.3%).

Table 4.5. Activities Brewery Visitors Participated in and the Activities' Importance Level

	Overall brewery visitor response	Local patrons response	Overall tourists to the brewery (non-local) response	Beer focused tourists response	Non-beer focused tourists response
Brewery Tour	40.3%	39.9%	42.7%	44.9%	42.0%
n	523	313	192	69	50
<i>Average importance level</i>	3.76 \bar{x}	3.74 \bar{x}	3.85 \bar{x}	4.10 \bar{x}	3.66 \bar{x}
<i>SD</i>	1.27	1.20	1.33	1.19	1.40
n	368	214	144	51	89
Beer Sampling	56.1%	58.8%	54.2%	52.2%	56.3%
n	523	313	192	69	67
<i>Average importance level</i>	4.52 \bar{x}	4.48 \bar{x}	4.6 \bar{x}	4.73 \bar{x}	4.52 \bar{x}
<i>SD</i>	.85	.91	.70	.52	0.78
n	434	262	161	56	101
Beer Purchasing	56.7%	62.6%	48.4%	53.6%	47.1%
n	523	313	192	69	59
<i>Average importance level</i>	4.29 \bar{x}	4.48 \bar{x}	3.96 \bar{x}	4.08 \bar{x}	3.84 \bar{x}
<i>SD</i>	1.01	.81	1.21	1.17	1.23
n	442	271	158	60	95
Food Sampling	20.2%	22.4%	17.7%	13.0%	21.0%
n	523	313	192	69	25
<i>Average importance level</i>	3.06 \bar{x}	3.19 \bar{x}	2.88 \bar{x}	3.00 \bar{x}	2.86 \bar{x}
<i>SD</i>	1.41	1.42	1.37	1.43	1.33
n	277	164	104	37	64
Food Purchasing	31.9%	39.3%	21.4%	26.1%	19.3%
n	523	313	192	69	23

<i>Average importance level</i>	3.34 \bar{x}	3.53 \bar{x}	3.03 \bar{x}	3.02 \bar{x}	3.08 \bar{x}
<i>SD</i>	1.43	1.36	1.45	1.48	1.43
<i>n</i>	341	215	116	47	66

Though beer sampling was second in planned activity, it was reported to be the most important (4.52 \bar{x}) with beer purchasing coming in second (4.29 \bar{x}). Independent sample t-tests were conducted on brewery activity importance for local patrons and tourists to the brewery. There was a statistically significant difference for beer purchasing between locals (M = 4.48; SD = .81) and tourists to the brewery (M = 3.96; SD = 1.21); $t(240.9)=4.86$; $p=.000$. Also, independent sample t-tests were conducted to identify differences between beer focused tourists verses non-beer focused tourists on the reported importance of each brewery activity. A statistically significant difference for beer sampling was found between beer focused tourists (M = 4.73, SD = .52) and (M = 4.52; SD = .78); $t(149.6)=1.98$; $p=.049$.

Comparing differences between establishment type, brewpubs (breweries with restaurants) verses production breweries (breweries with no restaurant), in the reported level of importance of brewery activities showed statistical significance for all activities (see Table 4.6 and Table 4.7). Results showed that beer purchasing was the main activity planned (68%) and most important activity (4.57 \bar{x}) at brewpubs. Food purchasing was the second planned activity (60%) and third most important activity (4.11 \bar{x}) at brewpubs. Respondents at production breweries thought sampling beer was the most important activity (4.61 \bar{x}) and was the main planned activity (61.6%). Beer purchasing was second

in planned activity (50%) and second most important activity (4.08 \bar{x}) followed closely by brewery tour (48.8%, 3.92 \bar{x}).

Table 4.6. Activities Brewery Visitors Participated in and the Activities' Importance Level Broken Down by Brewpubs and Production Breweries

	Brewpubs	Production Breweries
Brewery Tour	27.6%	48.8%
n	147	320
<i>Average importance level</i>	3.43 \bar{x}	3.92 \bar{x}
<i>SD</i>	1.36	1.20
n	115	253
Beer Sampling	48.3%	61.6%
n	203	320
<i>Average importance level</i>	4.37 \bar{x}	4.61 \bar{x}
<i>SD</i>	.98	.76
n	153	282
Beer Purchasing	68.0%	50.0%
n	203	320
<i>Average importance level</i>	4.57 \bar{x}	4.08 \bar{x}
<i>SD</i>	.75	1.12
n	190	253
Food Sampling	29.6%	14.4%
n	203	320
<i>Average importance level</i>	3.63 \bar{x}	2.63 \bar{x}
<i>SD</i>	1.32	1.34
n	120	157
Food Purchasing	60.0%	14.4%
n	203	320
<i>Average importance level</i>	4.11 \bar{x}	2.46 \bar{x}
<i>SD</i>	1.03	1.30
n	181	160

Table 4.7. Test of Significance for Brewery Activities Between Brewpubs and Production Breweries

	Mean of brewpubs	Mean of production breweries	t	P value
Brewery tour importance	3.43	3.92	-3.33	0.00
Beer sampling importance	4.37	4.61	-2.61	0.01
Beer purchasing importance	4.57	4.08	5.50	0.00
Food sampling importance	3.63	2.63	6.18	0.00
Food purchasing importance	4.11	2.46	12.83	0.00

Trip planning and behavior.

Overall, almost half of the responding brewery visitors (47.5%) decided to visit the brewery within the 24-hours of visiting (see Table 4.8). Results show that the majority (69%) of brewery visitors learned about NC breweries and the brewery they were at, through their friends and family (see Table 4.8).

Brewery visitors reported having visited on average 7.46 \bar{x} NC breweries in the past year; 10.07 \bar{x} for locals and 3.54 \bar{x} for tourists to the breweries (5.59 \bar{x} for beer focused tourists). Independent samples t-tests were conducted to detect the different in the number in group and number of NC breweries the respondents had been to in the last year between beer focused tourists verses non-beer focused tourists and between local verse tourists to the brewery. Statistically significant difference was found for how many breweries the respondent had been to between the locals (M = 2.86, SD = 2.50) and tourists to the brewery (M = 3.27; SD = 2.93); $t(347.9)=3.91$; $p=.000$). Also, how many breweries the respondent had been to was found to be statistically significant between beer focused tourists (M = 5.59; SD = 8.14) and non-beer focused tourists (M = 2.37; SD

= 4.17); $t(87.5)=3.04$; $p=.003$. A chi-square test was conducted showing the statistical significance of how far in advance they planned their visit $\chi^2(6) = .009$ between locals and tourists to the brewery.

Table 4.8. Planning and Behavior for Brewery Visitors

	Overall brewery visitor response	Local patrons response	Overall tourists to the brewery (non-local) response	Beer focused tourists response	Non-beer focused tourists response
Average Number in Group	3.01 \bar{x}	2.86 \bar{x}	3.27 \bar{x}	3.16 \bar{x}	3.33 \bar{x}
SD	2.65	2.50	2.93	2.58	3.16
n	511	309	192	68	115
How many NC Breweries have you been to in the last year?	7.46 \bar{x}	10.07 \bar{x}	3.54 \bar{x}	5.59 \bar{x}	2.37 \bar{x}
SD	22.24	28.11	6.07	8.14	4.17
n	512	305	191	68	119
Do you receive beer news?					
Yes	28.2%	31.0%	25.7%	32.4%	22.7%
n	522	313	191	68	119
How far in advanced did you plan to visit this brewery today?					
As I was passing by	13.3%	14.2%	10.9%	2.9%	15.1%
During the last 24 hours	47.5%	50.0%	44.3%	40.6%	46.2%
Within the last week	20.9%	21.5%	18.8%	23.2%	16.0%
About two weeks ago	7.2%	5.0%	11.5%	14.5%	10.1%
About a month ago	4.5%	2.6%	7.8%	11.6%	5.9%
More than a month ago	6.4%	6.6%	6.3%	7.2%	5.9%
n	512	302	192	69	119

How did you hear about NC breweries?					
Friends/Relatives	69.0%	70.0%	67.7%	75.4%	63.9%
A beer festival	27.7%	31.6%	20.3%	27.5%	16.8%
Brewery signage	20.1%	23.6%	16.1%	23.2%	12.6%
Area restaurant	27.9%	30.4%	24.5%	30.4%	21.0%
A Convention/Visitors Bureau	1.5%	1.0%	2.1%	1.4%	2.5%
A Chamber of Commerce	0.8%	0.6%	1.0%	1.4%	0.8%
Newspapers	13.4%	19.5%	4.2%	7.2%	2.5%
Brochure/Pamphlets	7.8%	6.7%	10.4%	15.9%	7.6%
Magazine	11.3%	13.7%	7.8%	11.6%	5.9%
Radio	4.4%	6.7%	0.5%	0.0%	0.8%
Internet/website	27.5%	28.4%	27.1%	36.2%	21.8%
Other	12.4%	12.8%	12.0%	11.6%	12.6%
n	523	313	192	69	119
How did you hear about the brewery you are in now?					
Friends/Relatives	69.4%	71.6%	66.7%	75.4%	63.0%
A beer festival	8.6%	8.3%	8.3%	7.2%	8.4%
Brewery signage	11.3%	12.8%	9.9%	10.1%	10.1%
Area restaurant	21.0%	23.3%	17.2%	15.9%	17.6%
A Convention/Visitors Bureau	1.0%	0.6%	1.0%	0.0%	1.7%
A Chamber of Commerce	0.6%	0.6%	0.5%	0.0%	0.8%
Newspapers	6.1%	9.6%	1.0%	0.0%	1.7%
Brochure/Pamphlets	3.1%	2.6%	4.2%	4.3%	4.2%
Magazine	3.3%	3.8%	2.6%	1.4%	3.4%
Radio	2.1%	3.5%	0.0%	0.0%	0.0%
Internet/website	15.7%	14.4%	18.8%	23.2%	16.0%
Other	14.0%	16.3%	10.4%	8.7%	10.9%
n	523	313	192	69	119

Brewery visitors' psychographics.

The psychographics of a beer focused tourists and non-beer focused tourists had no significant differences discovered. Both groups responded high on each psychographic question except for one: “when visiting a new place, I prefer to use tour guides”. The two psychographic items that had the highest averages were: “during my travels, I am always interested in learning something new” and “I seek out local restaurants” (see Table 4.9). An independent samples t-test was conducted, and a significant difference was found for “I do not like to travel” for locals (M = 1.60, SD = 1.04) and tourists to the brewery (M = 1.34; SD = .84); $t(459.3) = 3.06$; $p=.002$. There was also a significant difference found for “When visiting a new place, I prefer to use tour guides” for locals (M = 2.06, SD = 1.09) and tourists to the brewery (M = 2.33; SD = 1.13); $t(495) = 2.63$; $p=.009$.

Table 4.9. Psychographics for North Carolina Brewery Visitors

	Overall brewery visitor response	Local patrons response	Overall tourists to the brewery (non-local) response	Beer focused tourists response	Non-beer focused tourists response
I do not like to travel.	1.5 \bar{x}	1.6 \bar{x}	1.34 \bar{x}	1.32 \bar{x}	1.36 \bar{x}
SD	0.98	1.04	0.84	0.82	0.87
n	516	309	189	68	117
I enjoy a true local experience (e.g., local culture).	4.28 \bar{x}	4.25 \bar{x}	4.36 \bar{x}	4.34 \bar{x}	4.40 \bar{x}
SD	0.90	0.92	0.87	0.89	0.81
n	518	311	189	68	117

I seek out local restaurants (i.e. non-chain restaurants).	4.38 \bar{x}	4.34 \bar{x}	4.45 \bar{x}	4.41 \bar{x}	4.51 \bar{x}
SD	0.89	0.93	0.84	0.78	0.82
n	516	310	188	68	116
During my travels, I am always interested in learning something new.	4.48 \bar{x}	4.43 \bar{x}	4.56 \bar{x}	4.51 \bar{x}	4.61 \bar{x}
SD	0.81	0.83	0.78	0.70	0.77
n	518	311	189	68	117
Before traveling, I spend a lot of time searching for information of where I am traveling.	3.65 \bar{x}	3.68 \bar{x}	3.64 \bar{x}	3.79 \bar{x}	3.57 \bar{x}
SD	1.11	1.09	1.14	1.17	1.07
n	518	311	189	68	117
I like destinations with a variety of activities and attractions.	4.24 \bar{x}	4.23 \bar{x}	4.25 \bar{x}	4.25 \bar{x}	4.29 \bar{x}
SD	0.91	0.89	0.95	0.87	0.90
n	517	311	188	68	116
When visiting a new place, I prefer to use tour guides.	2.17 \bar{x}	2.06 \bar{x}	2.33 \bar{x}	2.34 \bar{x}	2.30 \bar{x}
SD	1.12	1.09	1.13	1.27	1.03
n	515	308	189	68	117
I like to be close to nature when traveling on leisure trips.	3.53 \bar{x}	3.53 \bar{x}	3.52 \bar{x}	3.64 \bar{x}	3.47 \bar{x}
SD	1.07	1.04	1.13	1.12	1.08
n	518	309	189	69	118
For me, travel means to experience new and different lifestyle.	4.00 \bar{x}	4.00 \bar{x}	3.52 \bar{x}	4.04 \bar{x}	4.00 \bar{x}
SD	1.01	1.02	1.00	1.06	0.97

n	517	308	191	69	118
I enjoy adventurous activities.	4.19 \bar{x}	4.22 \bar{x}	4.02 \bar{x}	4.23 \bar{x}	4.1 \bar{x}
SD	0.93	0.90	0.99	0.96	0.99
n	517	308	191	69	118

Additional Brewery Preferences and Motivations for NC Brewery Visitors

Brewery visitors reported high scores for a number of brewery preferences and motivations (see Table 4.10). Independent samples t-tests was conducted on these items for both beer focused tourists verses non-beer focused tourists as well as local verse tourists to the brewery. There was a significant difference for “the location of the brewery is important” for locals (M = 3.75, SD = 1.06) and tourists to the brewery (M = 3.48; SD = 1.14; $t(494) = 2.69$; $p = .007$). A significant difference for “I will drive more than an hour to visit a brewery” for locals (M = 3.07, SD = 1.38) and tourists to the brewery (M = 3.38; SD = 1.35; $t(496) = 2.42$; $p = .016$). Lastly, a significant difference for “I enjoy touring beer routes/trails, if available” for locals (M = 3.38, SD = 1.28) and tourists to the brewery (M = 3.66; SD = 1.28; $t(491) = 2.38$; $p = .018$). Significant difference was found for “I will drive more than an hour to visit a brewery” for beer focused tourists (M = 4.09, SD = .99) and non-beer focused tourists (M = 3.00, SD = 1.35); $t(173.3) = 6.31$; $p = .000$). Significant difference was found for “I enjoy touring beer routes/trails, if available” for beer focused tourists (M = 3.91, SD = 1.11) and non-beer focused tourists (M = 3.53, SD = 1.33); $t(181) = 2.00$; $p = .047$). A significant difference was also found for “merchandise is important for breweries to offer” for beer

focused tourists ($M = 3.21$, $SD = 1.24$) and non-beer focused tourists ($M = 2.86$, $SD = 1.11$); $t(183) = 1.94$; $p = .054$.

Table 4.10. Additional Brewery Preferences and Motivational Push and Pull Items for Brewery Visitors

	Overall brewery visitor response	Local patrons response	Overall tourists to the brewery (non- local) response	Beer focused tourists response	Non- beer focused tourists response
The location of the brewery is important.	3.65 \bar{x}	3.75 \bar{x}	3.52 \bar{x}	3.43 \bar{x}	3.52 \bar{x}
SD	1.10	1.06	1.14	1.20	1.10
n	513	308	116	68	116
I will drive more than an hour to visit a brewery.	3.18 \bar{x}	3.07 \bar{x}	3 \bar{x}	4.09 \bar{x}	2.99 \bar{x}
SD	1.38	1.38	1.35	0.99	1.35
n	516	310	116	68	116
I enjoy touring beer routes/trails, if available.	3.48 \bar{x}	3.38 \bar{x}	3.53 \bar{x}	3.91 \bar{x}	3.53 \bar{x}
SD	1.28	1.28	1.28	1.11	1.33
n	511	306	116	67	116
Merchandise is important for breweries to offer.	3.06 \bar{x}	3.06 \bar{x}	2.86 \bar{x}	3.21 \bar{x}	2.86
SD	1.18	1.19	1.18	1.24	1.11
n	515	309	117	68	117
I enjoy brewery tours.	4.21 \bar{x}	4.19 \bar{x}	4.25 \bar{x}	4.40	4.15
SD	0.92	0.93	0.92	0.80	0.98
n	515	309	188	67	117
It is important for the brewery to provide a variety of beer types (e.g., ambers, porters, IPAs, stouts, pilsner).	4.52 \bar{x}	4.55 \bar{x}	4.47 \bar{x}	4.32 \bar{x}	4.54 \bar{x}
SD	0.74	0.72	0.80	0.85	0.76

n	516	310	188	68	117
It is important for breweries to provide specialty beer (e.g., seasonal beer).					
	4.23 \bar{x}	4.26 \bar{x}	4.17 \bar{x}	4.06 \bar{x}	4.22 \bar{x}
SD	0.96	0.91	1.02	1.14	0.96
n	514	307	189	68	117
The location of the brewery is important.					
	3.64 \bar{x}	3.75 \bar{x}	3.48 \bar{x}	3.43 \bar{x}	3.52 \bar{x}
SD	1.10	1.05	1.14	1.20	1.10
n	513	308	188	68	116
I prefer craft beer over big name beer.					
	4.42 \bar{x}	4.44 \bar{x}	4.4 \bar{x}	4.51 \bar{x}	4.35 \bar{x}
SD	0.95	0.94	0.98	0.92	1.00
n	516	309	189	68	117
I order local craft beer whenever I can.					
	4.29 \bar{x}	4.34 \bar{x}	4.23 \bar{x}	4.41 \bar{x}	4.14 \bar{x}
SD	1.01	0.97	1.04	0.85	1.14
n	516	309	189	68	117

Factor Analysis

An initial principle component analysis was conducted without any restriction and produced a correlation matrix, communalities, eigenvalue, scree plot, and factor loadings. In addition, an initial reliability analysis was conducted and produced a reliability statistic, inter-item correlation matrix, and item-total statistic. The purpose for this initial analysis was to help reduce items and get a more parsimonious scale. Three main criteria were used to reduce items at this stage: factor score, goodness of fit and correct-item total correlation. Based on the data eight items were deleted producing a 15 item scale ($r=.78$).

The second part of the analysis consisted of conducting an exploratory factor analysis (EFA) with Varimax rotation. The analysis produced four factors with eigen

values of one or greater with a total variance explained of 61.96%. The exploratory analysis identified four dimensions. The individual factor names were developed by taking into account the items they included (see Table 4.11).

The first dimension, labeled “craft brewery experience”, consisted of three items reflecting beer knowledge and experiencing and tasting new NC beer. These three items had craft brewery experience loading factor ranging from .81 to .71 and explained 27.11% of the total variance (see Table 4.11). The second dimension, “enjoyment”, explained 15.37% of the variance, and consisted of three items reflecting the desire to be entertained, to get away and be stress free weekend. This dimension had loading factors between .77 and .60. The third dimension, which explained 9.79% of the variance, “socialization”, consisted of four items containing the desire to meet new people, to bring family together, and to be with family and friends. The “socialization” factors loaded between .72 and .62. The fourth and final dimension “beer consumption”, contained two items indicating the preference of buying beer and to drink heavily. These two items had loading factors ranging from .82 to .63 and explained 9.69% of the total variance.

Table 4.11. Exploratory Factor Analysis Providing an Understanding of Motivational Factors of Tourist to North Carolina Breweries

Factor/Item (% of explained variance)	Mean	Factor Loading
<i>Factor 1. The craft brewery experience (27.11%)</i>		
To experience North Carolina beer	4.23 \bar{x}	0.81
To taste new beer	4.52 \bar{x}	0.73
To increase my beer knowledge	3.98 \bar{x}	0.71
<i>Factor 2. Enjoyment (15.37%)</i>		
To enjoy the entertainment	3.22 \bar{x}	0.77

To get away for the weekend/day	3.19 \bar{x}	0.74
To relieve stress	3.14 \bar{x}	0.61
<i>Factor 3. Socialization (9.79%)</i>		
For food tasting	2.10 \bar{x}	0.71
To help bring the family together more	2.39 \bar{x}	0.69
So I can meet people with similar interest	2.77 \bar{x}	0.66
So I can be with friends/family	3.76 \bar{x}	0.62
<i>Factor 4. Beer consumption (9.69 %)</i>		
To buy beer	3.55 \bar{x}	0.82
To get drunk	1.72 \bar{x}	0.63

CHAPTER V

DISCUSSION AND CONCLUSION

The North Carolina craft brewery industry is young and growing quickly. This research provides the NC beer industry and the NC tourism industry with information about who visits NC breweries, their motivations, and what marketing stimuli prompted the visit. Based on the results, it can be inferred that the average NC brewery visitors were male, approaching middle-age and residents of North Carolina. Additionally, respondents reported that almost half of the visitors were single, a majority has a bachelor's degree or higher, work full-time and about a third make between \$40,000 – \$79,999 in household income. Over half of the tourists to the breweries were residents of North Carolina, which corroborates what the state's tourism office reports about NC tourists in general (North Carolina Division of Tourism, Film, and Sports Development, 2010)

This research indicates that NC has a critical mass of brewery visitors, substantiating the need to focus resources on marketing this industry. Results show that 38% of all the respondents were not residents of the community in which the brewery was located, indicating additional tourism potential from marketing craft brewery experiences. The results also found that 13% of the overall visitors to NC breweries expressed the main reason for traveling was to visit a NC brewery. This substantial number of visitors to NC breweries, including tourists and specifically beer-focused

tourists, indicates that there is a true interest in NC craft breweries, both for community locals and visitors from the outside. Though it was found that NC has strong market for beer tourism, the author cannot determine a consumer profile of “beer tourist” that can be defined with any precision as a unique beer-focused tourist group. However, the results suggest some targeted strategies that breweries can use, such as promoting beer routes/trails and designing/selling unique beer merchandise.

Implications of Brewery Visitor Profiles for Marketing

Based on the niche target market discussion in the literature review, North Carolina can target a specific market segment approaching middle-aged male’s enhancement of brewery marketing campaigns and services. Interestingly, these demographic characteristics of the current brewery visitor sample differ from the target market found for NC wine tourism in that past research, which shows a preponderance of women aged 50 - 59 (Rivera et al., 2010). The author suggests to marketers that, while *beverage tourism* at the conceptual level might be a useful umbrella term, practitioners will want to develop separate beer tourism and wine tourism marketing promotions as the targeted consumers vary markedly between these two beverages. Additionally, a number of authors (Karim & Chi, 2010; McKercher, Okumus, & Okumus, 2008; Plummer et al., 2005) include beverages as a component of culinary tourism. As previously discussed in the literature review, Robinson and Novelli (2005) combined wine and culinary tourism as micro-niches under the macro-niche rural tourism. The author of this paper proposes an alternative model for culinary and beverage tourism (see Figure 5.1). In the proposed model, culinary and beverage tourism are listed as two separate macro-niches. Beverage

tourism and culinary tourism are separate types of niche tourism and need to be regarded as separate market segments. Overall, the terms culinary, gastronomy, cuisine, and gourmet all pertain mainly to food, not beverages. A wine or beer tourist may not be interested in the food but solely on the beverage, and vice versa. As beverage tourism continues to grow, the definitions of culinary and beverage needs to be separated.

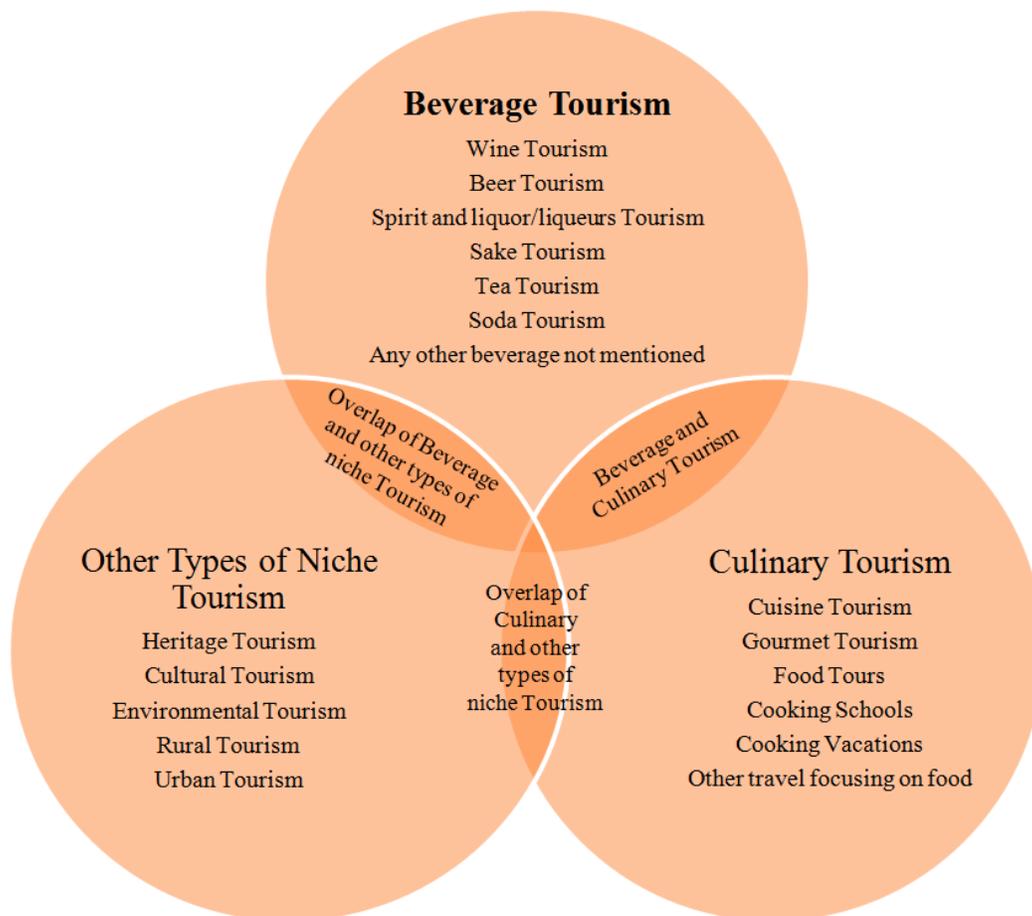


Figure 5.1. Francioni’s Culinary and Beverage Niche Tourism Model. Francioni’s niche tourism model separates beverage and culinary tourism as individual macro-niches. The mirco-niches of each marco-niche are listed. The overlap of each separate niche is shown (e.g., Beverage and Culinary Tourism, Beverage Tourism and Heritage Tourism).

Beverage tourism includes the micro-niches of wine tourism, tea tourism, spirit and liquor/liqueurs (e.g., whiskey and bourbon) tourism, sake tourism, soda tourism (e.g., Coca Cola or Pepsi), beer tourism, and other beverage trails, distilleries or breweries a tourist can visit. Culinary tourism includes the micro-niches of: cuisine tourism, gourmet tourism, food tours, cooking schools, cooking vacations, and other travel focusing on food. Furthermore, because of possible difference target markets, each micro-niche also needs to be regarded as separate market segments. For example, the author believes that a wine tourist is different from a beer tourist, which is different from a tea tourist and so forth.

It is also important to understand that there are overlaps with all separate types of niches; these niches are not mutually exclusive. Figure 5.1 shows the overlap as “Beverage and Culinary Tourism”. An example of this overlap would be beverage and food pairings where the participant enjoys the local food and beverages that complement each other. Beverage tourism can also have characteristics of ecotourism, farm tourism, cultural tourism, heritage tourism (e.g., tea tourism), and health tourism (Jolliffe & Aslam, 2009).

Targeted media and marketing strategies.

Based on the results of this study, NC beer and tourism industries should select marketing and advertising outlets that target males and beer enthusiasts. Some trade publications that respondents commonly listed as preferred sources for general beer news as well as NC beer news were All About Beer Magazine, Beer Advocate, and Southern Brew News. Additional sources of information commonly listed were brewery websites

and social media sites. It is recommended to continue to drive consumers to individual brewery and the Brewers Guild websites and aggressively utilize social media outlets such as Facebook and Twitter.

It was also found that beer focused tourists and non-beer focused tourists reported the many of the same consumer interests and differed only slightly in travel behavior and brewery preferences. This confirms that, considering tourists visiting NC breweries, beer focused tourists were not substantially different from non beer-focused tourists.

The results also indicated that a majority of brewery visitors learned of NC beer by word of mouth (WOM) through family and friends. This means that breweries were able to satisfy previous visitors, thereby creating positive WOM. To increase WOM advertising it is recommended that breweries allow consumers access to visit the onsite facilities of the brewery. In addition, breweries must provide an environment that the consumers are looking for during the visit. Research showed that a majority of brewery visitors live in the community that the brewery is located. Therefore, providing free entertainment, special events, beer/brewery club and/or circulating a newsletter will get the consumer out to the brewery. By providing events and entertainment, breweries can ensure that locals will become repeat visitors, an outcome which establishes brand loyalty, as discussed in the literature review. Once loyal to the brewery, that consumer will become a vehicle of free positive WOM advertising for the brewery. An example of a NC brewery providing special event space is Highland Brewery. Highland Brewery offers an event space next to its brewery for weddings, meetings, and other celebrations.

Other marketing channels that respondents have replied positively to were the internet (e.g., brewery websites, social media, and search engines), area restaurants (e.g., where the beer is distributed to), beer festivals (e.g., World Beer Festival), and brewery signage. It is suggested that breweries continue to use and improve these marketing channels. New marketing tools such as apps on smart phones and tablets (e.g., the new Travel North Carolina App providing all NC breweries and beer mapping Apps) are going to be a vital resource to the NC beer tourism industry's promotional goals. Additionally, since breweries' financial resources are limited, traditional advertising outlets such as magazines and television are out of reach for most craft breweries. Thus, the use of lower cost social media and positive WOM is extremely important.

Additionally, study results show that a very small percent of respondents learned about NC breweries through a tourism outlet, such as a visitor bureaus. For that reason, there is a need for a strong partnership between breweries via the NC Brewers Guild and local/state tourism organizations, area attractions, tour operators and restaurants. Visitor bureaus' spend about \$100 million annually promoting attractions and businesses in their destinations and much of this promotion is centered on in-state outlets (Tuttell, 2012). To reach consumers outside the NC market, the NC Brewers Guild needs to work with the NC Division of Tourism to promote beer tourism. Tuttell (2012) discussed the NC Division of Tourism's move to digital marketing, which targets by geography and not by gender. Current study results show that the top reported states of residence of tourists to NC breweries are the same as the top states the NC Division of Tourism markets to, specifically the rest of the southeastern US states and the state of New York (North

Carolina Division of Tourism, Film, and Sports Development, 2010;Tuttell, 2012).

Additionally, when using digital media and marketing, tone must make sure correct key words are picked up by search engines such as Google.

Authors such as Plummer et al. (2005) and Telfer (2001), also encourage alliances to accomplish the goal of growing the brand and tourism. By promoting and collaborating with tourism organizations and the hospitality industry (e.g., hotels, restaurants, and tour operators), breweries will benefit by expanding knowledge base, financial backing (e.g., co-op marketing), contacts and networking databases (e.g., media outlets and public relation opportunities that the brewery would not otherwise be able to access). Breweries can create supporters and advocates out of staff members of partner organizations. Partners such as lodging businesses can benefit from a niche tourism market that has discretionary income to spend and stays on average three nights in the destination. Breweries, area attractions, accommodations, area restaurants, and so forth can provide pamphlets at their locations, which will motivate visitors to visit a greater number of businesses in the location. The Greater Raleigh Convention and Visitors Bureau working with the breweries in the Raleigh area is a great example of this type of partnership. An additional example of a NC brewery taking advantage of the benefits of tourism is Red Oak Brewery. Red Oak hopes to create “Red Oak Village” which will consist of an Inn and other attractions such as an art museum. Owner Bill Sherrill hopes “Red Oak Village” will become a tourist destination (Martin, 2009).

Additional brewery visit considerations.

In the literature, it has been found that opening the doors for visitors creates and strengthens brand loyalty, thus creating opportunities to grow through repeat visitation and positive WOM advertising (Fountain et. al., 2008). In the current study, respondents filled out the survey mostly on Saturdays around the lunch time hour. Though it cannot be determined the cause of this (e.g., if Saturdays are peak visitation day or the surveys were handed out more on weekends), it is customary for tourists to travel on weekends. Therefore, the breweries that are not open for visitors on Saturdays should shift their business plan to allow for this crucial day to be available. Moreover, it can be inferred that breweries that focus solely on distribution through external vendors (and do not permit onsite visitation or consumption) are missing out on a potentially important component of their marketing strategy.

Not only is it important to create brand loyalty for individual breweries, but also for the NC beer brand. Results showed that brewery visitors have visited on average seven other NC breweries (10 for locals, and 5 for beer focused tourists). These numbers demonstrate that visitors are interested in the NC beer brand and want to explore multiple NC breweries. Breweries need to join in efforts to promote the overall NC beer brand. Plummer et al. (2005) found that the breweries on the Waterloo Ale Trail “moved beyond the competitive model to work together and promote beer tourism at their respective craft breweries. By creating links between the breweries, the small and larger companies are able to benefit from the collaboration process” (p. 456). In order for the NC beer industry to be sustainable, all NC breweries and the NC Brewers Guild need to work closely

together to achieve the common goal of success. Developing and/or collaborating with tour companies, such as The Asheville Brews Cruise and Beltline Brew Tours in the Triangle, will also increase individual brewery visibility and awareness of the NC beer brand, as well as motivate additional NC beer tourism. To add, over half of brewery visitors responded that they “agree” or “strongly agree” that they are motivated by the potential to “enjoy beer routes/trails, if available.”

Results also reveal that brewery visitors decided to visit a brewery within the 24-hour period prior to visiting. Tourists had a higher incidence of planning visits to the breweries in advance than did locals. This means breweries constantly need to be utilizing their marketing tools such as posting on Facebook walls (walls of breweries and of partner organizations), tweeting, and re-tweeting.

Study results show that tourists to NC breweries travel with friends and spouses and plan to visit on average two breweries while visiting. The majority spend on average three nights away from home either in a hotel/motel or with friends/relatives. Travel behavior information such as this can be utilized in tourism destinations lodging options more successfully. This data also supports lodging development decisions, since it may be posited that if a beer focused tourist wants to stay the night, there ought to be some type of accommodation in the area to serve this purpose.

Analysis of Motivational Factors for Tourists to NC Breweries

According to the results, there are four main motivational factors that help explain why tourists choose to visit NC breweries: the craft brewery experience, enjoyment, socialization, and beer consumption. The four factors relate closely to the push and pull

theory that was previously discussed in the literature review. The first and last factors, the craft brewery experience and beer consumption, meet the physical pull factors of the brewery. Meaning, the breweries are providing the brew master to explain the beer making process, and beers to taste and to consume. The second and third factors, enjoyment and socialization, are internal push motivational factors. This means the tourists to NC breweries are looking to satisfy the internal need to be entertained and to relax, get away, and socialize with others.

The first factor, the craft brewery experience, included the items: “to experience North Carolina beer”, “to increase my beer knowledge”, and “to taste new beer”. These items illustrate the elements of a craft brewery that people enjoy and are attracted to the most. This factor shows us that people want to learn about and are interested in the craft beer making process. Brewery tours are important to offer in order for visitors to learn more about the beer making process and what the breweries are using to make the beer (over half of the brewery visitors responded, “agree” or “strongly agree” to enjoying brewery tours). Breweries that do not provide brewery tours may want to rethink their business plans to allow this important service. For example, a brewpub that does not have the ability to provide tours to educate visitors of their beer making process and beers may want to work on adjusting their facility to accommodate this. Brewpubs that do have the capacity for offering brewery tours should offer the tours to each person that walks in their doors, making the customer more interested in their beer (i.e. Angus Barn in Raleigh offers wine cellar tours to every guest).

Enjoyment is the next motivational factor on which brewery owners need to focus. Visitors are looking for a place where they can be entertained, relax and get away from the everyday life. To attract new and repeat visitors, it is important for the brewery to provide this opportunity. As already suggested, providing free entertainment and special events, such as music, beer tastings, and/or games (e.g., Big Boss Coaster Toss), will draw visitors to the brewery.

The third motivational factor, socialization, included “meeting new people with similar interests”, “bringing family together”, “for food tasting”, and “being with family and friends”. This internal need to socialize can be capitalized upon by the brewery by providing an environment where this can be done. Simply being open at convenient hours and providing an area to lounge and talk will satisfy this need. Some breweries serve as alternative meeting spots for social groups (e.g., Meet Up) and even speed dating events.

The final factor motivating tourists to visit a NC craft brewery is beer consumption. This factor included “to buy beer” and “to get drunk”, which suggests that to bring tourists to the brewery, all the brewery has to do is to make beer and have it available to buy. A number of the tourists to the breweries are in town catching up with family and friends and they do this while enjoying a few beers at a local brewery. The breweries’ ability to provide beer to buy on site (pints, six-packs, growlers, kegs) and a location for visitors to sit and consume the product will evidently draw customers.

The author suggests that, if brewery and tourism professionals take these four factors and assimilate them into their marketing plans, increased growth in brewery

visitation will result. Knowing tourists' motivations for visiting a brewery helps brewery owners and tourism professionals emphasize attractors in marketing to consumers outside the local area.

Each brewery professional can take these four motivational factors and use them to their own unique benefit. Tailoring a brewery to fit what the consumers want in a unique way results in an easy sale by the brewery marketers and tourism professionals.

Managerial and Planning Implications

There are four steps to successfully getting the NC beer tourism industry moving forward. First of all, education is the fundamental first step. Educating leaders in the NC beer industry, including the NC Brewers Guild, about the positive and negative effects of tourism will allow them to make an informed decision to participate or not. For example, a brewery participating in beer tourism will see an increase in sales and loyalty but at what cost? Time? Money? Some brewery owners have chosen to not to participate in beer tourism because they do not see the value in it. They do not want to take the time and energy it takes to open their brewery to visitors. The author hopes that this thesis will get these brewery owners to rethink the benefits of being a part of the beer tourism industry. This certainly applies for production breweries because results indicated that tourists are more likely to visit a production brewery. It is important for all brewery owners to know that beer tourism is naturally going to occur with the growth of the beer industry, but it needs to be managed and planned properly in order for it to be sustainable. Once the NC beer industry is educated on tourism, they will need to decide to participate or not. If a brewery does not want to participate in beer tourism, then it is better it does

not try. If a brewery is not passionate about hosting tourists, then the tourists will not have a positive experience and that will negatively affect the overall NC beer tourism image.

The second step to effectively build the beer tourism industry in NC is to create the infrastructure and the capacity to handle beer tourism. Once again, this research found that the four main motivational factors for tourists to the brewery were: the craft brewery experience, enjoyment, socialization, and beer consumption (refer to the results for more details on these factors). Therefore, once a brewery is on board to participate in beer tourism, they need to have the space and facility that will enhance and satisfy these four motivations. Please refer to the previous discussion of these motivational factors for suggestions on how to utilize these four factors.

The next step in the process would be to develop a marketing plan. Each brewery will have a different marketing plan that fits them and their business model best. The overall marketing plan for the NC beer tourism industry needs to start with a state-level perspective and a state-level marketing organization, like the NC Brewers Guild. It is imperative for each individual brewery and regional organizations, such as Asheville Brewers Alliance, interested in growing their business by using beer tourism as a vehicle to work closely with NC Brewers Guild. For example, breweries can support the NC Brewers Guild financially, legislatively and by providing product for the Guild to use in marketing endeavors. As suggested previously, the NC Brewers Guild as well as individual breweries need to work closely with local visitor bureaus. It is the function of the local visitors bureau to promote what that destination has to offer to tourists, so by

simply providing beer to the visitors bureau marketing staff to use in their marketing efforts, will benefit both parties. Brewery tourism seems to be fed by in-state travelers for the most part; thus, focusing on in-state marketing outlets would be beneficial as well. To go beyond the NC market, the NC Brewers Guild needs to continue to work with NC Division of Tourism in promoting beer tourism, as previously mentioned.

Finally, the above steps need to be evaluated. The brewery's facilities and marketing plans need to be evaluated on an on-going basis in order to determine areas to enhance and improve. It is natural for marketing plans, business plans, events, and so forth to have faults, thus finding out what does not work and changing it will only strengthen them. It is also important to watch trends in the industry in order to keep up with changes.

Suggestions for Future Research

As research on brewery visitation and tourism is quite limited, there are many suggestions for future research involving not only the NC beer tourism industry but beer tourism in general. The author's first suggestion for future research is to offset some of the methods issues within this study by involving more breweries for a longer time frame in the collection of data. A larger dataset would increase reliability, thus enhancing statistical analyses and possibly strengthen conclusions.

With respect to the goal of determining brewery visitor profiles, while it has been suggested in this chapter that marketing to males is justified on the basis of the results of this research, further research is recommended to tease out market opportunities among female consumers. Females accounted for 34% of the respondents in the current sample.

It is difficult to determine the true ratio of males and females within the brewery visitation population given the convenience sampling methods and short-term data collection period used in this study. The author believes that, as the NC craft beer industry grows, the number of females interested in craft beer will also grow. NC craft breweries already have the male audience, thus, it is important to also market to the female demographic because this is a target market that can grow—if future research studies can be designed and implemented to verify this market potential. The NC Division of Tourism markets to the females of the household because they are traditionally the decision-makers of the family (Tuttell, 2012). The NC beer industry can reflect this in their marketing strategies. Carolina Brewery offers an example of a brewery that market to females. To support a breast cancer awareness race, this brewery provided pink bumper stickers that said “Support your local brewery” and featured the brewery logo and brewpub address. Jon Connolly, Director of Brewing Operations for Carolina Brewery, supported their decision to market to females by saying, “as craft beer becomes more mainstream, I see more and more women drinking beers of all strengths and colors now-a-days” (Connolly, 2012).

Furthermore, since study results show that beer-focused tourists do have a few unique responses as consumers of brewery experiences in contrast to tourists that do not come specifically for the beer, it is also critical to perform additional research to improve the conceptual definition of “beer tourist”. As a classifying term, “beer tourist” remains poorly specified and perhaps additional behavioral and motivational items can be employed in future studies to describe a subset of “beer tourists” more appropriately.

The next research suggestion would be to continue the current study's lead for looking at beer tourism but focus on beer festivals rather than brewery visitation. Are the motivational factors for visiting a beer festival different for visiting a brewery? Do beer focused tourists to festivals have the same demographics as those visiting breweries? A comparative analysis of beer focused tourists to festivals and beer focused tourists to breweries' locations would be interesting.

Now that we know who visits NC craft breweries and why, we need to know how NC breweries affect the local and state economy. An economic impact study is suggested to determine the direct and indirect effects of the NC beer industry and NC beer tourism on NC communities. This research will support the NC beer and tourism industries lobby for financial assistance from the state and from other sources. "As Executive Director, my wish list consists of more funding. More funding would allow us to update our branding and to participate in more events with national exposure" (Bassett, 2012). The NC wine industry "generates an annual economic impact of \$1.28 billion and supports nearly 7,600 jobs" ("North Carolina Wine and Grape Industry," 2011). What does the NC beer industry generate?

Future research could control for differences in craft brewery characteristics. This research can carefully assess characteristics such as: location (city vs. rural, close to other breweries vs. isolated), size of brewery production (big vs. small), age (old vs. new), type of brewery (production vs. brewpub), and so forth. An in-depth look at these characteristics will be beneficial to aid in the generalizability of visitor profiles.

Additionally, a research study on the psychology of taste would be interesting. For example, a study contrasting “a keg mentality” vs. “a craft beer psyche” would look at motivations such as binge drinking versus the slow enjoyment of the refined tastes of craft beer. The current research touched on this idea only a little in that it was found that “to get drunk” had the lowest motivation score. Are those who prefer craft beer and those who prefer a “chuggable” beer a homogeneous group? What are the demographic differences? This research could possibly lead to an additional comparative analysis research endeavor looking at similarities and differences between “craft beer aficionados” and “wine aficionados”.

A final suggestion for future research would be to consider the agricultural aspects of the NC beer industry. As there are already a number of hop farms, a closer look into hop growing in NC and the possible niche for hops-to-tap tourism (designed after farm-to-fork concept). There are only a couple of breweries using NC hops because the crop harvest is not large enough to support full batches of beer (Bassett, 2012). This research will determine if using NC grown hops would be a viable trade. If hops are a viable business, then it is possible that, like grapes and the wine industry, hops can eventually support the beer making industry in NC, thus leading to additional financial support from the state’s agriculture department. This is an additional way in which the NC beer industry and beer tourism industry can develop.

Summary

In order for beer tourism to grow, benefitting individual breweries and the greater NC beer industry, brewery and tourism professionals must consider the results and

suggestions of this research. The research has provided critical information on the demographics of brewery visitors, the motivations of tourists who visit NC breweries, and recommendations for appropriate marketing tactics. It is up to the tourism industry to educate local breweries the benefits of tourism. It is up to the breweries to reach out not only to locals but to tourists as well. This research found that tourists to the breweries want to be able to try a variety of beer (factor one), relax (factor two), socialize (factor three) and finally drink a pint or three (factor four).

Each brewery needs to find its own unique style (e.g., presentation of brewery, presentation of beer, logo, entertainment, story) and in doing so set itself apart. Visitors are drawn to and remember unique stories. In addition, breweries need to collaborate with each other and create strong alliances with other businesses and with marketing and tourism authorities. By developing a strong partnership, the beer industry and tourism industry will benefit by increasing their efforts to work towards a common goal of promoting their area and brand.

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APPENDIX A.

ABC COMMISSION LIST OF NC BREWERIES

North Carolina Breweries

Total locations: **55**

Click on the file number for brand information.

Permittee	Location	Mailing Address	File Number
Asheville Brewing Company Owner: Asheville Pizza and Brewing Company	77 Coxe Avenue Asheville NC 28801	675 Merrimon Avenue Asheville NC 28804	00090855CM-998
Asheville Pizza and Brewing Company Owner: Asheville Pizza and Brewing Company	675 Merrimon Avenue Asheville NC 28804		00090855CM-999
Ass Clown Brewing Company Owner: Ass Clown Beer and Wine LLC	17039 Kenton Drive Suite 102 Cornelius NC 28031		00188350CM-999
Aviator Brewing Company Owner: Aviator Brewing Company Inc	209 Technology Park Lane Fuquay Varina NC 27526		00166081CM-998
Big Boss Brewing Owner: E B C Brewery LLC	1249-A Wicker Drive Raleigh NC 27604		00151427CM-999
Biltmore Brewing Company Owner: Biltmore Estate Wine Company	12 Old Charlotte Hwy Asheville NC 28803	One North Pack Square Asheville NC 28801	0009CM-994
Boylan Bridge Brewpub Owner: Boylan Bridge Brewpub LLC	201 South Boylan Avenue Raleigh NC 27603		00168515CM-999
Bull City Burger and	107 East Parrish		00188269CM

Brewery Owner: Bull City Burger and Brewery LLC	Street Suite 105 Durham NC 27701		-999
Carolina Beer Company Owner: Carolina Beer and Beverage LLC	110 Barley Park Lane Mooresville NC 28115	PO Box 1183 Mooresville NC 28115	00183755CM-999
Carolina Brewery Owner: Carolina Brewery Inc	462 West Franklin Street Unit B Chapel Hill NC 27516	PO Box 8 Chapel Hill NC 27514	00120904CM-999
Carolina Brewery Pittsboro Owner: Carolina Brewery and Grill Pittsboro Inc	120 Lowes Drive Suites 100-102 Pittsboro NC 27312		00170656CM-999
Carolina Brewing Company Owner: Carolina Brewing Company LLC	140 Thomas Mill Road Holly Springs NC 27540		0540CM-999
Catawba Valley Brewing Company Owner: Catawba Valley Brewing Company	212 South Green Street Morganton NC 28655	PO Box 1154 Glen Alpine NC 28628	00081271CM-998
Craggie Brewing Company Owner: Drew Brew LLC	197 Hilliard Avenue Asheville NC 28801		00173623CM-999
Dry County Brewing Company Owner: Pizzle View Projects LLC	615 Oak Avenue Spruce Pine NC 28777	965 Sandy Branch Road Bakersville NC 28705	00180875CM-999
Duck Rabbit Craft Brewery Owner: Duck Rabbit Craft Brewery Inc	4519 West Pine Street Farmville NC 27828		00130968CM-999
Foothills Brewing Owner: 638 Brewing Company Inc	638 West 4th Street Winston Salem NC 27101	PO Box 21053 Winston Salem NC 27120	00134957CM-999
Four Friends Brewing Owner: Four Friends Brewing LLC	10913 Office Park Drive Charlotte NC 28273	15106 Arbroath Court Charlotte NC 28278	00177530CM-999
French Broad Brewing	101-D Fairview		00104662CM

Company Owner: Benefit Brewing Inc	Road Asheville NC 28803		-999
Frog Level Brewing Company Owner: Frog Level Brewing Company LLC	56 Commerce Street Waynesville NC 28786	84 Mountain View Drive Waynesville NC 28786	00187290CM -999
Front Street Brewery Owner: Wilmington Brewers LLC	9 North Front Street Wilmington NC 28401		00159974CM -999
Full Moon Cafe Owner: Half Moon Junction Inc	208-C Queen Elizabeth Street Manteo NC 27954	102 Holly Court Manteo NC 27954	00188433CM -999
Fullsteam Brewery Owner: Fullsteam Brewery LLC	726 Rigsbee Avenue Durham NC 27701	PO Box 25107 Durham NC 27702	00181442CM -999
Green Man Brewery Owner: Green Man Brewing Co LLC	23 Buxton Avenue Asheville NC 28801		00179263CM -999
Heizelmannchen Brewery Owner: Heizelmannchen Brewery Inc	545 Mill Street Sylva NC 28779	PO Box 2075 Sylva NC 28779	00127477CM -999
Highland Brewing Company Owner: Highland Brewing Company Inc	12 Old Charlotte Hwy Suite H Asheville NC 28803		0533CM -998
Hops Grill Brewery Owner: Hops Operating LLC	9950 East Independence Blvd Matthews NC 28105	150 Hancock Street Madison GA 30650	00162459CM -999
Huske Hardware House Restaurant and Brewery Owner: Team Collins H3X LLC	405 Hay Street Fayetteville NC 28301	3008 Stonehenge Court Fayetteville NC 28306	00166233CM -999
Lexington Avenue Brewery Owner: Up Periscope Inc	39 North Lexington Avenue Asheville NC 28801	PO Box 7303 Asheville NC 28802	00174193CM -999
Liberty Steakhouse and Brewery Owner: Liberty Steakhouse and Brewery of High Point Inc	914 Mall Loop Road High Point NC 27262	1177 Southgate Drive Charleston SC 29407	00096488CM -999

Lobster Trap Owner: Lobster Trap Inc	35 Patton Avenue Asheville NC 28801		00166897CM-999
Loes Brewing Company Owner: Loes Brewing Company Inc	2033 North Center Street Hickory NC 28601		00189248CM-999
Lonerider Brewing Company Owner: Lonerider Brewing Company	8816 Gulf Court Suite 100 Raleigh NC 27617		00165205CM-999
Lumina Winery and Brewing Company Owner: Lumina Winery LLC	6620 Unit H Gordon Road Wilmington NC 28411	500 Callie Court Wilmington NC 28409	00136904CM-998
Mash House Restaurant and Brewery Owner: Cross Creek Brewing Company LLC	4150 Sycamore Dairy Road Fayetteville NC 28303		00088918CM-999
MillerCoors Owner: MillerCoors LLC	863 East Meadow Road Eden NC 27288	3939 West Highland Blvd Milwaukee WI 53208	00162782CM-997
Nantahala Brewing Company Owner: Nantahala Brewing Company Inc	61 Depot Street Bryson City NC 28713	PO Box 483 Bryson City NC 28713	00178737CM-999
Natty Greenes Brewing Company Owner: Hamburger Square Brewhouse Inc	1918 West Lee Street Greensboro NC 27407		00130119CM-998
Natty Greenes Pub and Brewing Company Owner: Hamburger Square Brewhouse Inc	345 South Elm Street Greensboro NC 27401	1918 West Lee Street Greensboro NC 27403	00130119CM-999
Natty Greenes Pub and Brewing Company Owner: Natty Greenes Pub and Brewing Company of Raleigh LLC	505 West Jones Street Raleigh NC 27603	1918 West Lee Street Greensboro NC 27403	00181873CM-999
Old North State Winery Owner: Old North State Winery Inc	308 North Main Street Mount Airy NC 27030		00147491CM-999

Olde Hickory Brewery Owner: O H B Inc	2828 Hwy 70 West Hickory NC 28602		00083380CM-999
Olde Hickory Brewery Owner: O H B Inc	2 3rd Street SW Hickory NC 28602	222 Union Square Hickory NC 28601	00083380CM-998
Olde Mecklenburg Brewery Owner: Olde Mecklenburg Brewery LLC	215 Southside Drive Charlotte NC 28217		00167671CM-999
Outer Banks Brewing Station Owner: Outer Banks Brewing LLC	600 South Croatan Hwy Kill Devil Hills NC 27948		00107697CM-999
Pisgah Brewing Company Owner: Pisgah Brewing Company	150 Eastside Business Park Unit 150 Black Mountain NC 28711		00130400CM-999
Railhouse Brewery Owner: Railhouse Brewery LLC	122 Garrett Street Suite C Aberdeen NC 28315	162 Black Horse Lane Kittrell NC 27544	00183632CM-999
Red Oak Brewery Owner: Red Oak Brewery LLC	6901 Konica Drive Whitsett NC 27377		00168630CM-999
Rock Bottom Restaurant and Brewery Owner: Big River Breweries Inc	401 North Tryon Street, Suite 100 Charlotte NC 28202	2001 Riverside Drive Suite 3100 Chattanooga TN 37406	00082756CM-999
Roth Brewing Company Owner: Roth Brewing Company LLC	5907 Triangle Drive Raleigh NC 27617		00179712CM-999
Southern Appalachian Brewery Owner: Appalachian Craft Brewery LLC	822 Locust Street Suite 100 Hendersonville NC 28792		00186312CM-999
Top of the Hill Restaurant and Brewery Owner: Micromanagers LLC	100 East Franklin Street, Suite F Chapel Hill NC 27514		0549CM-999

Triangle Brewing Company Owner: Triangle Brewing Company Inc	918 Pearl Street Durham NC 27701	2227 Gablefield Lane Durham NC 27713	00154491CM-999
Wedge Brewery Owner: Wedge Brewing Company LLC	125B Roberts Street Asheville NC 28801	440 Montford Avenue Asheville NC 28801	00161702CM-999
Weeping Radish Brewery Owner: FarmBrew LLC	6810 Caratoke Hwy Jarvisburg NC 27947	PO Box 389 Jarvisburg NC 27947	00145680CM-999

APPENDIX B.

INFORMATION FOR NC BREWERIES

TO: NC Brewery

September 27, 2011

Thank you for participating in this research!!!

I am a graduate student at University of North Carolina at Greensboro. My thesis is conducting research for the NC beer industry. I am conducting research to find out what the visitor and motivational profiles are for NC breweries (this means who and why people are going to NC breweries). With this information I will be doing a marketing strategy (brand marketing) for the NC beer industry. I have full support of the Brewers Guild. This will be a stepping stone to possible state funding and more research. My hope is to get a majority (if not all) of NC breweries to participant in this survey.

During Oct 1-14th, I only ask you/brewery staff to hand out the enclosed surveys to visitors to your brewery. This includes locals as well as tourists. If you would like to print more, please feel free. I only ask to at least get back what is in the packet. You will collect the surveys and at the end of the collection period please mail the surveys to me.

I only ask *three things* of breweries: hand out the surveys, collect the surveys, and send the surveys to me at the end of the data collection period.

A few key points:

- Please hand out surveys to anyone who visits your brewery (even regulars – the more tourists the better). **I would like a good mixture of regulars and tourist!**
- Hand out surveys **October 1-14th**
- Please mail surveys back to me by November 1st (please mail to: Dr. Erick Bryd

UNCG

P.O. Box 26170 Greensboro, NC 27402)

I graduate in May, so results will be provided by then. I am also hoping to publish an academic article with this research. It will be only the third academic article in the world about "beer tourism." The other two are about an ale trail in Canada and beer tourism in Bavaria.

This research will benefit the NC beer industry as a whole. If you would like information for your individual brewery, please let me know.

Thank you so much for participating in this research. Please let me know if you have any questions, comments, or concerns. I would like to hear your opinions.

Many thanks for your help!

Jennifer Francioni

Jlfranci@uncg.edu

919-630-9886

Graduate Assistant University of North Carolina Greensboro

Enclosed: Surveys to hand out
and flyer with additional information

APPENDIX C.

FLYER FOR NC BREWERIES



NC Beer Tourists Research



The NC Brewer's Guild and UNC Greensboro is teaming up to conduct this research project. This study will produce a visitor and motivational profile that will assist in developing a tourism marketing plan for the NC craft beer industry. This research acts as a stepping stone for state funding and additional needed research for the NC craft beer industry.

Why Help?

Craft beer is an increasingly growing industry in North Carolina and in the country. The NC tourism industry has quickly jumped on board to promote and build the NC craft beer industry and the beer tourism scene. In NC beer industry is lacking much needed support at this time (compared to its counterpart, the NC wine industry). This research is a stepping stone for the NC beer industry to get valuable state funding and much needed research.

*****The more surveys collected the better!**

Though majority of NC breweries are participating in this survey, only a small number of people are being surveyed, therefore participation is very valuable.

Purpose

The **purpose** of this research is to provide the NC craft beer industry:

- an understanding of who a beer tourist is,

- an understanding of what motivates a beer tourist to participate in brewery tours, and
- as well as the NC tourism industry suggestions on how to market to beer tourists.



What to say

Hello. The NC Brewer’s Guild and UNC Greensboro are teaming up to conduct research on the NC beer industry. This study will produce a visitor and motivational profile that will assist in developing a tourism marketing plan for the NC craft beer industry. If you have not already, it would be greatly appreciated if you could participate by fill out this survey. Please read the front sheet as it explains the purpose of the study, your rights, and contact information if you have any concerns or questions.

Thank you for participating!



APPENDIX D.

SURVEY INSTRUMENT



North Carolina Brewery Visitor Study

The University of North Carolina at Greensboro and the North Carolina Brewer's Guild are teaming up to conduct this research project. *This study will produce a visitor and motivational profile that will assist in developing a marketing plan for the NC craft beer industry.* This research acts as a *stepping stone for state funding and additional needed research* for the NC craft beer industry.

Only a small number of people are being surveyed, therefore participation is very valuable. Participation in this questionnaire is completely voluntary. You have the right to refuse to participate or to withdraw at any time, without penalty. If you do withdraw, it will not affect you in any way. If you choose to withdraw, you may request that any of your data which has been collected be destroyed unless it is in a de-identifiable state.

Your consent will be indicated by completing and returning the questionnaire. Your answers will be kept confidential. After completing the questionnaire please fold your questionnaire and return it. There are no risks related to taking this survey. *As an incentive for participating, one randomly chosen participant will receive a gift card to a local restaurant.*

Questions, concerns or complaints about this project or benefits or risks associated with being in this study can be answered by Dr. Erick Byrd who may be contacted at (336) 334-3041

By completing this questionnaire you are agreeing that you read, or it has been read to you, and you fully understand the contents of this document and are openly willing consent to take part in this study. All of your questions concerning this study have been answered. By filling out this questionnaire, you are agreeing that you are 18 years of age or older and are agreeing to participate.

Thank you for your time and participation,

Erick T Byrd, PhD
Associate Professor

Jennifer Francioni
Research Assistant

As an incentive for participating, one randomly chosen participant will receive a gift card to a NC restaurant/brewpub. If you would like to be entered into this drawing please legibly provide your email address. Email addresses will not be used for anything other than contacting the winner.

Email: _____

Today's date _____

Time of visit: Lunch Dinner Other

1. What city and state do you reside? _____

2. Are you a resident of the community in which this brewery is located in?

Yes No



If yes, please go to question 8. If no, continue to question 3

3. Are you staying overnight on this visit?

Yes No

3a. **If yes**, how many nights? _____

4. Where will you be staying during this trip? (Please choose one)

Not staying overnight Hotel or motel Other: _____

With friends/relatives Campground

B&B Have not booked accommodations yet

5. Is visiting this/a brewery the main reason why you are visiting this community?

(Please choose one)

- Yes No

6. Including this brewery, how many breweries do you plan to visit on this trip?

7. You are traveling: (Please choose one)

- Alone With friends only
 With relatives only With relatives and friends
 With a spouse only Other: _____

8. How many people (including yourself) are in your group? _____

8a. How many under the age of 21? _____

9. **Not** including this microbrewery/brewpub, how many times have you visited a NC brewery in the last year? _____ breweries

10. Do you receive beer news from a website/magazine or blog?

- Yes No

10a. **If yes**, what website/magazine/blog do you get your news? _____

11. How far in advance did you plan to visit this brewery today? (Please choose one)

- As I was passing by About two weeks ago
 During the last 24 hours About a month ago
 Within the last week More than a month ago

12. How did you hear about **NC breweries**? (Check all that apply. Please share which magazine, newspaper, website, festival, extra.)

- | | |
|--|--|
| <input type="checkbox"/> Friends/Relatives | <input type="checkbox"/> Newspapers_____ |
| <input type="checkbox"/> A beer festival _____ | <input type="checkbox"/> Brochure/Pamphlets_____ |
| <input type="checkbox"/> Brewery signage_____ | <input type="checkbox"/> Magazine _____ |
| <input type="checkbox"/> Area restaurant _____ | <input type="checkbox"/> Radio _____ |
| <input type="checkbox"/> A Convention/Visitors Bureau
_____ | <input type="checkbox"/> Internet/website_____ |
| <input type="checkbox"/> A Chamber of Commerce
_____ | <input type="checkbox"/> Other _____ |

13. How did you learn about the brewery that you **are in now**? (Check all that apply. Please share which magazine, newspaper, website, festival, extra).

- | | |
|--|--|
| <input type="checkbox"/> Friends/Relatives | <input type="checkbox"/> Newspapers_____ |
| <input type="checkbox"/> A beer festival_____ | <input type="checkbox"/> Brochure/Pamphlets_____ |
| <input type="checkbox"/> Brewery signage_____ | <input type="checkbox"/> Magazine _____ |
| <input type="checkbox"/> Area restaurant _____ | <input type="checkbox"/> Radio _____ |
| <input type="checkbox"/> A Convention/Visitors Bureau
_____ | <input type="checkbox"/> Internet/website_____ |
| <input type="checkbox"/> A Chamber of Commerce
_____ | <input type="checkbox"/> Other _____ |

14. Please check (✓) the activities you plan to or have participated in while at this brewery and indicate how important these activities are to you. Check all that apply.

Not important <<.....>>Very important

- | | | | | | |
|--|---|---|---|---|---|
| <input type="checkbox"/> Brewery tour | 1 | 2 | 3 | 4 | 5 |
| <input type="checkbox"/> Beer sampling | 1 | 2 | 3 | 4 | 5 |
| <input type="checkbox"/> Beer purchasing | 1 | 2 | 3 | 4 | 5 |
| <input type="checkbox"/> Food sampling | 1 | 2 | 3 | 4 | 5 |
| <input type="checkbox"/> Food purchasing | 1 | 2 | 3 | 4 | 5 |

15. How important are each of the following reasons in making your decision to visit a brewery?

Not important <<.....>>Very important

- | | | | | | |
|--|---|---|---|---|---|
| To buy beer | 1 | 2 | 3 | 4 | 5 |
| To experience North Carolina beer | 1 | 2 | 3 | 4 | 5 |
| To taste new beer | 1 | 2 | 3 | 4 | 5 |
| To get drunk | 1 | 2 | 3 | 4 | 5 |
| To increase my beer knowledge | 1 | 2 | 3 | 4 | 5 |
| To help bring the family together more | 1 | 2 | 3 | 4 | 5 |
| So I can be with friends/family | 1 | 2 | 3 | 4 | 5 |
| So I can meet people with similar interest | 1 | 2 | 3 | 4 | 5 |
| For food tasting | 1 | 2 | 3 | 4 | 5 |
| To get away for the weekend/day | 1 | 2 | 3 | 4 | 5 |
| To enjoy the entertainment | 1 | 2 | 3 | 4 | 5 |

To relieve stress 1 2 3 4 5

16. How much do you agree or disagree with the following statements?

Disagree

<<.....>> **Agree**

I enjoy brewery tours.	1	2	3	4	5
It is important for the brewery to provide a variety of beer types (e.g., ambers, porters, IPAs, stouts, pilsner).	1	2	3	4	5
It is important for breweries to provide specialty beer (e.g., seasonal beer).	1	2	3	4	5
The location of the brewery is important.	1	2	3	4	5
I will drive more than an hour to visit a brewery.	1	2	3	4	5
I prefer craft beer over big name beer.	1	2	3	4	5
I order local craft beer whenever I can.	1	2	3	4	5
I enjoy touring beer routes/trails, if available.	1	2	3	4	5
Merchandise is important for breweries to offer.	1	2	3	4	5
I am at this brewery only to eat at their restaurant.	1	2	3	4	5
I do not like to travel.	1	2	3	4	5
I enjoy a true local experience (e.g., local culture).	1	2	3	4	5
I seek out local restaurants (i.e. non-chain restaurants).	1	2	3	4	5
During my travels, I am always interested in learning something new.	1	2	3	4	5

Before traveling, I spend a lot of time searching for information of where I am traveling. 1 2 3 4 5

I like destinations with a variety of activities and attractions. 1 2 3 4 5

Question 16 continued

Disagree<<.....>> Agree

When visiting a new place, I prefer to use tour guides. 1 2 3 4 5

I like to be close to nature when traveling on leisure trips. 1 2 3 4 5

For me, travel means to experience new and different lifestyle. 1 2 3 4 5

I enjoy adventurous activities. 1 2 3 4 5

I consider myself a regular to this brewery 1 2 3 4 5

17. What year were you born? _____

18. What is your gender?

- Male Female

19. What is the highest level of education you have attained? (Please choose one)

- High school Associate degree Bachelor's degree
 Graduate degree Doctorate

20. What is your marital status?

- Single Married Divorced

21. What is your employment status? (Check all that apply)

- Student (full-time) Employed (full-time) Employed (part-time)
 Unemployed Retired

22. Have you or do you currently serve in the Armed Forces of the United States?

- Yes No

23. Which category is closest to your total family income? (Please choose one)

- Less than 39,999 40,000 – 79,999 80,000 – 119,999
- 120,000 – 159,999 160,000 - 199,999 200,000 +