

Beer, Tourism and Regional Identity

**Relationships between beer and tourism in Yorkshire,
England**

by

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Author's Declaration

I hereby declare that I am the sole author of this thesis. This is a true copy of the thesis, including any required final revisions, as accepted by my examiners. I understand that my thesis may be made electronically available to the public.

Jeremy Niester

Abstract

Beer, brewing, and the public house have been celebrated institutions in English culture for centuries. The drink occupies a venerable position in the gastronomy of most regions and is an integral component in the lives of many. There is an emerging literature on culinary tourism as an increasingly important element of cultural tourism. Local cuisine can be used to distinguish unique tourist regions from their competitors in an ever-globalising world. While wine tourism in particular has been studied quite thoroughly in recent years, beer tourism has been largely neglected. The purpose of this study is to explore the current state of, and potential for beer tourism in Yorkshire, England. Beer tourism can be described as “visitations to breweries, beer festivals, and beer shows for which beer tasting and experiencing the attributes of a beer region are the prime motivating factors for visitors” (Plummer *et al.* 2003).

Through the use of a mail survey, short interviews, participant observation and secondary data collection techniques the author explored the extent to which local breweries use beer tourism practices; the specific beer tourism techniques being used by breweries in Yorkshire, and their perceived benefits and limitations; the partnerships, alliances and cooperation that may exist between the brewers themselves, and the tourism and hospitality industries; if and how tourism stakeholders draw upon beer and brewing to promote and market the region to tourists, and the role that brewers may play in this process. The author also made recommendations for brewery managers and regional marketing boards based upon relevant academic literature and the specific findings of this study.

The author makes note of numerous findings on participation rates for breweries in tours and beer festivals, the perceived benefits and limitations that beer tourism has for brewers, and research on the branding and marketing of Yorkshire beer. A detailed typology of breweries based upon their relationship and degree of integration with the tourism industry is introduced. Furthermore, a tentative hypothesis based upon a brewer’s rationale for involvement in tourism and the size and success of that brewery is presented. This hypothesis must be empirically tested in future research to determine its acceptability.

The author also presented a detailed review of the relevance of wine tourism literature for the field of beer tourism. It was found that although the two forms of beverage tourism share many commonalities, there exist as many differences. This comparison ultimately emphasises the importance of developing a specific beer tourism literature. It is hoped that the findings of this beer-specific research may be used by others with a keen interest in beer and tourism to undertake additional studies in the field.

This study solely investigates the links between beer producers and the tourism and hospitality industry in Yorkshire, England. A similar study in an alternative setting would most likely yield interesting results. Furthermore, additional studies on beer and tourism should take the size, brewing output capacity, and possibly the revenue of a brewery into account in order to investigate potential differences between breweries’ tourism strategies based upon their size and success in their market.

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I. INTRODUCTION

Background

Beer, brewing, and the public house have been celebrated institutions in English culture for centuries. It could be argued that beer is to the English, what wine is to the French. The drink occupies a venerable position in the gastronomy of most regions and is an integral component in the lives of many.

There is an emerging literature on culinary tourism as an increasingly important element of cultural tourism. Local cuisine, including beverages can be used to distinguish unique tourist regions from their competitors in an ever-globalising world. While wine tourism, in particular, has been studied quite thoroughly in recent years, beer tourism has been largely neglected. One of the most prominent studies of beer tourism was conducted by Plummer, Telfer, and Hashimoto (2006) and Plummer *et al.* (2005). It focused on issues of supply and demand along the Waterloo-Wellington Ale Trail in South-Western Ontario. Due to the lack of pertinent academic literature on beer tourism, the authors relied primarily on literature relating to wine and culinary tourism in order to structure their study. Thus, the study of beer tourism can be considered to be “immature” (Creswell 2003) as there is a significant lack of previous research and associated theory on this topic. Plummer *et al.* (2005 p. 456) noted that “There needs to be a greater recognition of the role that tourism can have for... breweries”.

Study Purpose

It is worthwhile to study beer tourism for a number of reasons. First, a case study on this topic could provide information for brewery stakeholders regarding the costs and benefits of using tourism strategies as an extension of their primary business focus and as

a way of further branding, promoting and selling their products. Secondly, such a study could be of use to pub and restaurant managers who may already have formal ties to a brewery, or may be interested in collaborating with brewers. Farmers and small business owners amongst others who wish to form vertical or horizontal alliances with each other or possibly adopt tourism strategies as a component of their own business practices may also find such a study generalisable to their own particular concerns. Lastly such a study may be of interest to tourism marketers and other tourism stakeholders who may be interested in how and why the brewing industry and local beers may be used to promote their region and to brand the area as a unique destination to both domestic and international visitors.

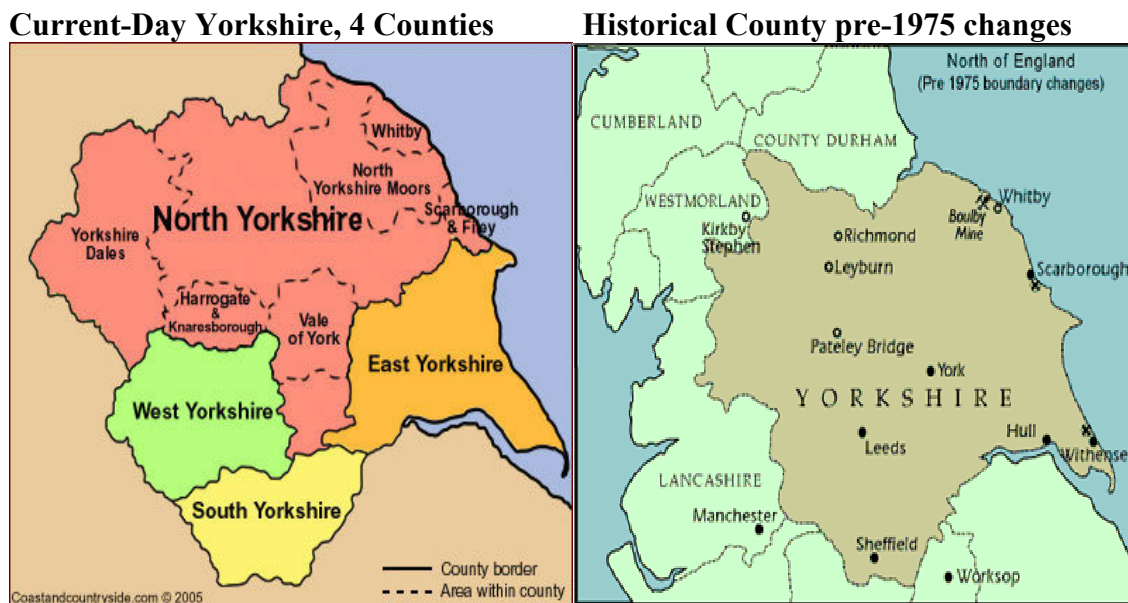
The purpose of this study is to explore the current state of, and potential for beer tourism in Yorkshire, England. At this stage in the research, the definition of beer tourism provided by Plummer *et al.* (2005) will be used. This definition states that beer tourism can be described as “visitations to breweries, beer festivals, and beer shows for which beer tasting and experiencing the attributes of a beer region are the prime motivating factors for visitors”.

Study Area

Yorkshire in the North of England was selected as a research location due to its well-established and historic ties to the beer-brewing industry. Currently, the region is home to two of the largest brewers in England and more than sixty smaller micro-breweries. Yorkshire is a major tourist destination in England, famous for its rugged North Yorkshire Moors, the agriculturally-rich Yorkshire Dales, historic cities such as York, and a fierce sense of county pride. The region is also well-know for the diverse

range of local delicacies it produces. These include Wensleydale and Swaledale cheeses, preserves, indoor-grown rhubarb, fresh lamb, sausages, several varieties of cakes, the famous Yorkshire pudding, and of course, Yorkshire ales. This study will investigate the five specific objectives which will be introduced in the following section.

Figure 1: Maps of the Yorkshire region in Northern England



(Maps of Yorkshire provided by Coast and Countryside Holiday Accommodation UK and Rock-Site UK)

Today, Yorkshire encompasses four distinct and separately-administered counties of England. North Yorkshire, South Yorkshire, West Yorkshire and the East Riding of Yorkshire and Humberside have historical ties which each other and still are promoted to international visitors by one all-encompassing tourism board: the Yorkshire Tourism Board. Several additional publicly-run bodies such as Deliciously Yorkshire, that runs campaigns to promote local food and drink from Yorkshire, are run across modern county boundaries as well. A map of the area of study is presented in Figure 1. It details the four

counties that make up the region known as Yorkshire in the central and Eastern parts of Northern England.

Research Objectives

Five objectives have been established for this research as follows:

- 1) To examine the extent to which local breweries use beer tourism practices.

- 2) To identify the specific beer tourism techniques being used by breweries in Yorkshire, and to evaluate the perceived benefits and limitations that these may offer to brewers.

- 3) To examine the partnerships, alliances and cooperation that may exist between the brewers themselves, and the tourism and hospitality industries in Yorkshire.

- 4) To examine if and how tourism stakeholders draw upon beer and brewing to promote and market the region to tourists, and the role that brewers may play in this process.

- 5) To make recommendations for brewery managers and regional marketing boards based upon relevant academic literature and the specific findings of this study.

II. LITERATURE

Creating a Touristic Identity

Promoting “Place”:

The tourism industry is undoubtedly one of the driving forces behind the global economy. The development of tourism has been embraced by countless local, regional, and national governments as a key to future economic success. Relph (1996) and Cohen (1972) noted that the modern tourism industry is primarily concerned with differences of place and culture. This focus on difference is of increasing importance in an ever-homogenising world.

In *Tourism and the Geographical Imagination*, Hughes (1992) addressed the socially-constructed nature of the tourist landscape. The author stipulated that seemingly “common-sense” views of the world are culturally constructed through a depiction of the world in media as diverse as painting, architecture and other visual codes. Through language and pictures, representations of place are constantly negotiated, often in contesting ways.

As a result of the socially-constructed nature of the tourist landscape, branding, by which a favourable and unique image of a destination can be created, has become all the more important. Hall (2003, p. 171) stated that “in an increasingly competitive environment, each location has recognised the economic benefits in establishing a clear and compelling selling proposition”. These propositions make it easier for potential investors or visitors to “buy into” the place that is being promoted.

Furthermore Hughes (1992) commented that “Places are being fashioned in the image of tourism. The past is being reworked by naming, designating, and historicizing

landscapes to enhance their tourism appeal” (Hughes 1992, p.33). Today, many places are being constructed in the image of tourism promotion, both socially and physically. Through branding and marketing techniques, a destination can highlight those images and features that they wish the world to see and, conversely, ignore the features of life, histories and realities that may be detrimental to their overall image and subsequently their tourism receipts. Place marketing today is so significant that it has received considerable attention as a social phenomenon (Hughes 1992).

Food and Drink as a Component of Regional Identity

Aside from assessing the appropriateness and potential of tourism strategies for use in the beer brewing industry, this research is also interested in how local food and drink may be employed as a component in the promotion of place. While the specific focal point of this study is concerned with beer; literature on wine, food and other agricultural products is of significance to this study as all of these products combine to form the gastronomy of a given region.

Corigliano (1995) stated that eating local food and drinking local wine are a way of coming into contact with the local population (Corigliano 1995 in Hjalager and Corigliano 2000). Hall and Mitchell (2000, p. 446) expanded on this to note that “the relationship between cuisine, place, and experience is... increasingly important for tourists...” Interaction with local people and their way of life is one of the primary components of cultural tourism and culinary tourism constitutes a significant portion of this important sub-category of the industry.

Several authors have noted the importance of, and potential for, culinary tourism in the promotion and development of tourism in a region. Telfer and Wall (1996); Torres

(2002); and Lopez and Martin (2006) have all concluded that forging connections between local food and tourism has the potential to benefit the local agricultural economies, as well as further regional cuisines. Telfer and Wall (1996) noted that the production and sale of local food products can contribute to sustainable development within a destination in numerous ways. These include providing an opportunity for creating identity, and enhancing the attractiveness of the destination.

Branding local food and drink has become an increasingly important weapon in combating the homogenizing effects of globalization. Bell and Valentine (1997, p.149) stated that “as regions seek to market themselves while simultaneously protecting themselves from the homogenising forces of globalisation, regional identity becomes enshrined in bottles of wine and hunks of cheese”.

Food and Drink in Tourism Marketing

Introduction

Hjalager and Corigliano (2000) noted that the inclusion of food imagery in tourism marketing material has increased considerably over recent decades. The authors suggested that food products and touristic images are often related in several ways. For example, food is often used successfully as an “eye-catcher” in brochures and other visual forms of promotional material.

Hjalager and Corigliano (2000) found that Italy, France and Spain have all been successful in the last decade in creating a strong gastronomic tourism identity. This success is based primarily on the strong quality of the nations’ reputations as food tourism destinations. However, other factors such as the quality of the products on offer,

suitable tourism infrastructures, and other available tourism resources such as entertainment and cultural initiatives are all key components for achievement.

In a study more pertinent to the beer tourism industry and the objectives of this paper, Eberts (2006) investigated the connection between the Canadian brewing industry and instances of “neo-localism” demonstrated through the naming and branding of regional beers. The concept of neo-localism can be seen as a desire in many communities to “reembrace the uniqueness and authenticity of place” (Jordon-Bychkov and Domosh 2003 p.432 in Eberts 2006). Eberts discovered that smaller microbreweries, which tend to cater to a regional or local market, have a much greater propensity to use local history, place names, or physical characteristics of the environment in their branding strategies. Because these beers are produced for, and consumed mainly by customers close to the area of production, this technique attempts to capitalize on neo-localism and feelings of community pride.

Branding beers with local themes and images may also help to produce a unique and distinct beverage culture in the region, and further expand upon the distinctiveness that a place can promote to visitors. This can be actively promoted to tourists through marketing material. It can also be employed as a component of the region’s overall gastronomic identity.

The Limitations and Challenges of using Food and Drink to Promote “Place”

Hjalager and Corigliano (2000, p.82) cautioned that not all regions are equally suited to use food products as a component of their touristic image. Participants may need to “take on a broader perspective before introducing tourism promotion projects based on food and eating”. Furthermore, Handszuh (2000) claimed that local food in the form of

regional cuisine is seldom represented in a meaningful way in promotion material and messages created for a mainstream tourist audience.

The observation made by Handszuh is corroborated by du Rand, *et al.* (2003) who noted that gastronomy should be identified and applied as a branding technique for destinations. Upon surveying eighty local, regional, and national destination marketing agencies in South Africa, the authors discovered that only fifty-two percent of respondents stated that food was used as a tool for promoting their specific destination. A lack of funding for developing and promoting the food experience was listed as the major constraint affecting the use of food as a marketing tool in promotional materials in South Africa. They suggested that local governments in South Africa should focus on luring tourists with the “key attractions” that regions have to offer, but they warn not to overlook secondary attractions like food. Nevertheless, while the extent to which food and drink imagery are used in tourism promotional material varies from place to place, it is self-evident that the culinary products that a tourist is exposed to constitutes an integral part of their overall experience.

Protecting Local Specialities

Over the last decade, the European Commission (EC) has recognised the importance that associations between food, drink and regional identity may have, and has conferred protective status on numerous regional food and drink specialities (Ilbery and Kneafsey 2000). According to the EC, a PDO or “Protected Designation of Origin” status ensures that a product is “produced, processed, and prepared in a given geographical area using recognised know-how”. A PGI or “Protected Geographical Indication” status stipulates that a “geographical link must occur in at least one stage of production,

processing, or preparation” (Agriculture and Food 2007). In addition to this geographical link, the product must also benefit from a “good reputation” on the world market. The EC claims that the protective status that it affords certain food products encourages agricultural production, protects product name from misuse and imitation, and works as a form of consumer information guide (Agriculture and Food 2007).

Of particular relevance to this study, three styles of British beer have so far been granted PDO/PGI status, while the same number of beers from the Czech Republic has also garnered protection. Twelve German beer styles are currently protected by PDO/PGI regulations (Agriculture and Food 2007). Numerous varieties of cheese, meat, seafood, milk products, oils and fruits, amongst other agricultural products are also protected by EC statutes. By protecting local specialities and products, regions may effectively assert their difference from one another, take pride in and celebrate local culinary heritage, and promote their specialised products to interested tourists.

The Beverage Tourism Industry

Beverage Tourism: A Tool to Promote Regional Identity?

Wine tourism is a topic that has received considerable attention over the past few decades. Cambourne (1998) went so far as to state that wine tourism has replaced eco-tourism as the hot new buzz word in the tourism industry. Hall and Mitchell (2000, p.446) outlined the implications that wine tourism may have for the development of a regional identity when they stated that “Wine... is becoming a significant dimension in not only promoting regional image, but also as a focal point of tourist interest. In a globalized economy, wine is traded internationally, and along with the trading of wine goes the trading of brands and regional images”. For instance, Hall and Mitchell noted

that the city of Oporto in the North of Portugal uses its connections with Port wine extensively in promotional material, and in the planning and hosting of local events and festivals that attract numerous tourists per year.

While wine tourism may be the star of the beverage tourism industry, several authors have written on other incarnations of beverage tourism. Martin and McBoyle (2006) stated that the creation of the Malt Whisky Trail in Moray, Scotland, represents a unique selling point for Scotland and the UK in both international and domestic marketing campaigns. The regional office of VisitScotland (Scotland's national tourist board) is strongly supportive of the Malt Whisky Trail as a unique icon of the nation's tourism industry (Martin and McBoyle 2006).

Although highly critical of apparent oversights in historical context and the consumerist slant of the brewery's narratives, Mager (2006) commented that South African Breweries (SAB) constructed two new visitors' centres in order to tie together beer, heritage and national identity in post-apartheid South Africa. In this particular study, Mager concluded that beer is promoted as a component of the unique heritage of South Africa through the creation of two multi-million Rand "beer museums". The potential benefits and limitations that a beverage producing firm may receive through the use of tourism will be addressed further in this chapter.

Beverage Tourism: A Catalyst in Regional Development?

Hjalager and Corigliano (2000) noted that Italy has been successful in recent years in using gastronomic tourism initiatives to improve the economic and social growth of some lesser-developed areas of the nation. Both private operators like restaurants, hotels and tour organisations, and public bodies that are responsible for tourism

infrastructure and rural protection schemes play important roles in the success of gastro-tourism projects. As wine tourism now constitutes an important element of culinary tourism, it would be logical to assume that such benefits might also be gained from other beverage tourism projects.

Aside from providing tourists with additional attractions that they may enjoy, wine and beverage tourism may also benefit the economy at large. O'Neill and Charters (2000) found that wine tourism has become a strong and growing area of special interest tourism in Australia, and is increasingly being employed as a significant development strategy by many regional and rural tourism boards. O'Neill and Charters discussed wine tourism's potential for development in the following statement:

With its wide range of benefits, including foreign exchange earnings, the creation of a wide range of both full- and part-time jobs, and the generation of secondary economic activity (the multiplier effect), wine tourism is a very lucrative industry with the ability to generate substantial wealth and growth. Not surprisingly, support for, and investment in, the wine tourism industry is now regarded as an essential regional development strategy by both government and the wine industry throughout Western Australia (O'Neill and Charters 2000, p. 113).

Wargenau and Che (2006) investigated the creation of a wine route in Southwest Michigan State. Those involved in the wine route employed vertical and horizontal alliances with each other in order to build the region in a competitive environment. The authors noted that wine tourism in the region offers many opportunities for not only the wineries themselves but also for tour operators, accommodation providers, restaurants and other businesses in the hospitality industry (Wargenau and Che 2006). This was also found to be the case in the Niagara wine region (Telfer 2001).

Hall and Mitchell (2000) concluded that wine tourism in the Mediterranean has the potential not only to stimulate development and overcome rural restructuring

challenges, but also to reposition the region's tourism product in the international market. Hall and Jenkins (1998) found that this goal may be achieved through the creation of new forms of local income, employment, and growth in a community; by contributing to the cost of economic and social infrastructures; by encouraging development in other industrial sectors through purchasing links; through a contribution to local amenities; and by helping to contribute to the protection of environmental and cultural resources. With regard to job creation alone, Bruwer (2003) found that over seven thousand jobs are directly contingent upon the South African wine industry and its associations with various regional wine routes.

Critical Success Factors in Beverage Tourism

As previously mentioned, the majority of academic literature that has been written on beverage tourism focuses directly on wine tourism and is based on a number of regional contexts. Due to the lack of literature on beer tourism, background literature from the wine tourism area of study is applied and analysed for the purposes of this research. Plummer *et al.* (2005 p. 456) noted that "There needs to be a greater recognition of the role that tourism can have for...breweries". The present study seeks to investigate the accuracy of the preceding statement while striving to contribute to the body of beer tourism-specific literature. It will explore the applicability of literature from a wine tourism or Scotch distillery tourism context may have on beer tourism in a British context.

A review of the wine tourism literature reveals that a majority of writers agree that the development of wine tourism is a seemingly natural business progression for wine producers as it presents the winery with the potential for a number of economic

benefits. For instance, Bruwer (2003) noted that the very essence of the wine industry lends itself to associations with the tourism industry. For Bruwer, “wine is a beverage that is associated with relaxation, communing with others, complementary to food consumption, learning about new things and hospitality” (Bruwer 2003, p. 423).

While authors may differ over which particular elements of the wine tourism experience are the most important for the success of the initiative, the majority appear to be in agreement over wine tourism’s potential. For example, Bruwer (2003) claimed that “In today’s world wine market what is important to acknowledge is that successful building of the brand identity and image of the winery, the wine region and the wine country of origin is, arguably, the single most important factor that will determine future success in the wine industry” (Bruwer 2003, p. 424).

O’Neill and Charters (2000) expanded upon this idea and noted that the level of service quality at the winery itself constitutes an increasingly important component for success in today’s highly competitive marketplace. If a positive impression is given in terms of service quality and hospitality, a casual customer may be turned into a loyal advocate for the winery.

Getz *et al.* (1999) stipulated that the majority of foreign wine tourists who visit a winery arrive from the countries to which that winery exports their products. Getz and Brown (2006) conducted a follow-up study of the critical success factors for wine tourism regions based upon demand-side analysis. The authors found that consumer’s value “visitor friendly” wineries complete with a knowledgeable staff as one of the core products of the wine tourism experience. Getz and Brown also found that factors such as “attractive scenery; a pleasant climate; well signposted wine trails; unique

accommodation with regional character; and fine dining” are important (Getz and Brown 2006, p. 156).

Potential Benefits for the Firm Associated with Beverage Tourism:

When exploring links between green tourism and the Scottish Malt Whisky Trail, McBoyle (1996, p.256) claimed that the objective of any industrial visitor’s centre is to “enhance the awareness of their brands and project an image of quality products derived through a production process that is willingly revealed”. Furthermore Martin and McBoyle (2006), Vecchio (2000) and Miller (1994) commented upon the heightened sense of brand awareness and public affiliation that a beverage industry firm may receive through the use of tourism. To illustrate this, Miller (1994) stated that by opening their doors to tourists, distilleries are primarily concerned with the increased exposure of their brands which ultimately may lead to increased sales, both on-site and ‘down the line’.

Hall and Mitchell (2000) claimed that newly-established wineries often sell the majority of the products at the cellar door. While already established wineries can use on-site visitors to further sales and increase brand recognition, newly-created or extremely small firms may gain an essential source of income from on-site visitors. The importance of this finding is also stressed by Telfer (2001) who reported that fourteen of the twenty-four wineries he contacted in the Niagara wine region of Ontario reported that at least fifty percent of their total wine sales take place on-site.

From a beer tourism perspective, Plummer *et al.* (2005) investigated the potential purchasing behaviour of beer tourists through the use of a self-administered survey. The authors found that “almost all visitors indicated that they had sampled a new type of beer and they planned to purchase that product in the future” (Plummer *et al.* 2005, p. 456).

In a follow-up study, Plummer *et al.* (2006) used axial coding to decipher the perceived positive and negative outcomes for brewery managers and other stakeholders of participation in the Waterloo-Wellington Ale Trail. Respondents listed benefits to the local area, access to government grants, beer sales, awareness of craft brewing/brands, increased combined impact, and working with others as positive consequences of participation in the Ale Trail project.

Potential Problems and Obstacles to Overcome in Beverage Tourism:

Plummer *et al.* (2006) found many commonly reported negative consequences for participation in the Ale Trail project. These included the extra work that goes into the organization and administration of such a development, issues of legal liability, associations with other breweries, a tendency towards repeat customers which could potentially diminish the overall exposure of the brewers to a new audience and lower than desired beer sales.

Hall and Mitchell (2000) stressed the potential that wine tourism has to contribute to a firm's business strategies and the economic redevelopment of some rural areas. While the overt use of wine tourism was recommended in their study, the authors also stressed that there are several hurdles to be overcome before the successful implementation of wine tourism can take place. The authors noted that many wine producers, especially some small-scale producers, "know much about viticulture, but little about their consumers and the wider international business environment within which they operate" (Hall and Mitchell 2000, p. 462).

Expanding a business beyond the confines of the core products produced may appear to be a daunting and unrealistic task for those who are primarily concerned with

making good wine or good beer on a small-scale or regional level. Further coordination and cooperation between the beverage tourism enterprise and local levels of government, marketers, the hospitality industry at large, and even competitors may be a challenge for many proposed beverage tourism schemes. These critical issues were confirmed by Hall and Mitchell (2000) who noted that there is a considerable lack of entrepreneurial skills, marketing ability, product development skills, service standards, and knowledge of consumer behaviour within the Mediterranean wine industry. To overcome these deficiencies Hall and Mitchell (2000) recommend that thorough education and training programs be initiated in the region to share knowledge of stakeholder and consumer needs, and to provide a realistic cost-benefit analysis for the adoption of wine tourism initiatives.

Alliances and Cooperation within the Beverage Tourism Industry

In today's complex economic climate, the beverage industry may be seen as occupying a market position that transcends classification in one economic sector alone. For instance, the production of beer has clear links to agriculture as farmers, be they local or foreign, produce hops, barley, and other grains to be malted. The malt used in British ale is most usually produced by an outside malthouse which then supplies the malted grain to the brewer. The boiling, fermentation, aging and ultimate creation of beer takes place in a brewery which is an industrial centre that employs workers much like any other manufacturing plant. Beer is also a consumable product that is distributed to supermarkets, liquor stores, pubs, bars and restaurants, either directly by the brewer or through a wholesaler or middleman. Furthermore, breweries promote their products through conventional advertising and the sponsorship of events, sporting teams etc. and

are often dependent upon the marketing and advertising industries for their success. When tourism is added into this equation, the use of and potential for strengthened cooperation between differing economic sectors may become of even greater importance. Beer could thus be seen to occupy an important position in the hospitality and entertainment industries of many industrialised nations such as England.

Buhalis (2000) concluded that partnership marketing can enable a destination to develop long-term relationships with consumers which benefit both the destination and suppliers involved. Tribe (1997) asserted that tourism alliances may help to market a product on a much wider scale than previously experienced as old rivals work together to alleviate competitive pressures.

Public-Private Sector Partnerships in the Beverage Tourism Industry

Martin and McBoyle (2006) found that the successful creation and continued operation of the Scottish Malt Whisky Trail has required that the personal interests of various stakeholders be set aside and balanced for the mutual benefit of all those involved. For over thirty years now, both private sector competitors and public sector partners have balanced their goals and embraced cooperation to work towards ensuring the continued success of the Malt Whisky Trail.

Bruwer (2003) investigated cooperation between governments, private enterprise, promotional associations and the tourism industry to form what he calls “networks”. These networks work together in a wide range of cooperative behaviours in order to provide mutually beneficial returns to all those involved in South African wine tourism routes. Hall and Mitchell (2000, p. 453) discussed the role that government may play in a beverage tourism strategy. The authors noted that government is often responsible for the

“promotional and coordination functions of national, regional, and local tourist organizations” and, in the case of the wine industry in particular, government often regulates product quality through strict appellation controls.

Telfer (2001) investigated strategic alliances within the Niagara wine region and made note of cooperative behaviour on formal and informal levels, and with regards to both horizontal and vertical linkages. Concerning horizontal linkages, joint-marketing efforts, festivals and special events exist between competing wineries in the region. These partnerships are mediated through the Ontario Wine Council and the Vintners Quality Alliance (a Canadian appellation system which stipulates quality control measures and regulations over wine produced in Ontario and British Columbia).

The possibility for vertical linkages between the wine industry and other tourism and hospitality providers is equally important. Telfer (2001) outlined specific examples of wineries that have gone so far as to open restaurants to provide tourists with a broad hospitality experience. In addition to this, other wineries retain kitchen space so as to bring in outside chefs when needed for catering festivals and special events.

Vertical alliances between wineries in Niagara and other economic sectors were also identified by Telfer (2001). These include links to accommodation providers through mutual referrals, word-of-mouth advertising, formal package deals, and links to tour operators. One larger winery in the Niagara region was found to have over fifty contacts with tour providers and operators alone!

The concept of a wine route has been adapted by the beer brewing industry in several areas, and is commonly referred to as a ‘beer trail’ or ‘ale trail’. These entities may be extremely informal or highly organized working with representatives from many

different firms, organizations and levels of government. Plummer *et al.* (2005) examined the creation of a beer tourism ‘ale trail’ in the Southern Ontario counties of Wellington and Waterloo. The ale trail was a self-guided tour of six breweries in three different communities that were made open to the public on weekends during the summer months.

The craft brewers, their representatives, and various committee members from economic development agencies and human resource development bodies involved in this partnership established several objectives that were designed to benefit both the brewers themselves and the region as a whole. These included “instilling pride in regional breweries, attracting visitors to the area and to individual breweries, developing a network of partners in the related hospitality industry, developing partnerships for tourism promotion and selling more beer” (Plummer *et al.* 2005, p. 452). The authors also noted that cooperation becomes possible as all stakeholders move beyond a competitive model in order to promote beer tourism at their individual craft (micro) breweries.

Challenges to Cooperation and Partnerships in the Beverage Tourism Industry

While ever-increasing visitor numbers demonstrated that the Waterloo-Wellington Ale Trail was a continued success with tourists, the Ale Trail project was ultimately discontinued (Plummer *et al.* 2006). The fall of the Waterloo-Wellington Ale Trail demonstrates the fragile nature of tourism industry cooperative schemes and the difficulties that exist in administering public-private tourism partnerships. Through correspondence with public and private stakeholders who took part in the Ale Trail, the authors were able to uncover significant differences in the responses of brewers and non-brewers for why the Ale Trail project was disbanded.

For non-brewers, incorrect structure, changes in leadership, a lack of commitment from brewers, expansion difficulties, the expense of the project and dissatisfaction among breweries were all cited as reasons that the Ale Trail did not continue its operation (Plummer *et al.* 2006). Brewers viewed the situation somewhat differently, stating that the abandonment of the ale trail was an “economic decision”, that differences in opinion over expansion plans arose and that other breweries’ decisions to leave the partnership ended the viability of the Waterloo-Wellington Ale Trail.

The Scottish Malt Whisky Trail is a public-private partnership that currently consists of partners from several distilleries, a regional council, and other economic and tourism development agencies in Scotland. Mistrust between the various stakeholders is an issue that may potentially damage the cooperative efforts of stakeholders. According to Martin and McBoyle (2006), public sector fears that private companies are trying to get their hands on public assets must be reconciled with private sector fears that public bodies may wish to combat declining revenue by taking funds from private sources.

Beverage Tourism: Implications for Consumers

In an investigation into South African wine routes, Bruwer (2003) found that ninety-two percent of wineries that took part in the study provided visitors with product tastings. Furthermore, eighty-eight percent of responding wineries claimed that they offer “cellar-door” sales of their products. Additionally, over fifty percent of responding wineries allowed visitors to take an organised tour of their production facilities. Often for a nominal fee, a wine tourist may enjoy an interesting and educational experience in a typically scenic and rural location.

While focusing on Scotch whisky tourism and wine tourism respectively, McBoyle and McBoyle (2007) and O'Neill and Charters (2000) both emphasized the importance of experience quality as a major draw in the beverage tourism industry. Furthermore, Martin and McBoyle (2006, p. 102) stated that the visitor may receive a series of “high quality experiences at little or no cost” to the firm.

McBoyle and McBoyle (2007) investigated the mutually beneficial symbiotic relationship that exists for both tourists and the distillery itself in a recent study they conducted on the Scottish Malt Whisky distilleries. McBoyle and McBoyle discussed so called “client-based” approaches for product differentiation within the Scottish distillery tourism industry. These include more in-depth interaction with the distillery for those who are willing to step beyond the usual ‘show and tell’ approach of distillery tourism (McBoyle and McBoyle 2007, p.3). These so called ‘special interest attractions’ offer an unhurried and personal experience in a Scottish whisky distillery, and take the form of extended tours and tastings, whisky schools, and even organized cruises to remote distilleries.

McBoyle and McBoyle (2007) presented a detailed schematic of the responses and values that high-end, personalized distillery tourism opportunities may provide to a visitor. The McBoyles noted that “in-depth instruction” and tutored tastings may ultimately lead to a “heightened sense of competence”, while ‘VIP’ treatment, and personalized attention may provide the visitor with a “heightened sense of self-worth” (McBoyle and McBoyle 2007).

The British Context

The British Brewing Industry Today

The British are among the world's highest consumers of beer. According to Slade (1998), the annual consumption rate of beer per capita in the UK hovers around the one hundred litre mark. This author also noted that, by some estimates, beer sales account for up to two percent of the United Kingdom's total gross domestic product (Slade 1998).

Since the post-war years, British tastes in beer have changed drastically. Traditionally in Britain, top-fermented ales have dominated figures in sales and consumption. Particular styles of ale include Stout, Mild, India Pale Ale, and the once extremely popular Bitter. Today in the UK, light-coloured lagers, made with cold-temperature bottom-fermenting yeast and most often lightly-roasted malted barley, are the most popular style of beer. However, this is not to say that the market share for ales has completely disappeared. Thanks in part to the consumer advocacy group the Campaign for Real Ale (CAMRA), British ales which are often made with traditional methods, which means that they are unfiltered, unpasteurized and served from a hand-pumped beer cask rather than a carbon-dioxide fuelled keg, are enjoying a resurgence in popularity.

Despite the renewal of interest in traditional beers and brewers, the UK beer market is dominated by only a few major players. As a result of mergers, acquisitions, and the subsequent economies of scales that these have provided, two large conglomerates dominate the British brewing industry. Diageo, makers of *Guinness and* several other popular international brands, and Scottish and Newcastle (recently acquired by Heineken and the Carlsberg group) are two of the key players that control much of the UK market share (Pugh *et al.* 2001). Other non-British-based global giants such as InBev (formerly Interbrew), Anheuser-Busch, SABMiller, Molson Coors, Heineken and the

Carlsberg group sell considerable amounts of beer in the UK as well. This leaves several hundred small, local brewers and a dozen or so larger regional and national brewers in the UK fighting for the scraps that are not controlled by the giant multinationals (Protz 2007). By one estimate, the four hundred or so small brewers in the United Kingdom account for just two percent of the entire beer market (Duffy 2001).

The vast majority of smaller local beer producers do not attempt to compete head-to-head with the popular lager brands such as *Carlsberg*, *Stella Artois* and *Fosters* that are light in colour and flavour. Rather, the majority of small brewers focus their attention on the niche market, providing pubs, wholesalers and customers with British Ales, popularly called Real Ale when produced in the traditional hand-pumped and unpasteurized fashion.

According to recent statistics, roughly seven million fewer pints of beer per day are now being sold in British pubs compared to sales figures from 1979 (Akwagyiram 2007). It has been suggested that beer is currently experiencing an image problem in the United Kingdom and that this has accounted for lower sales. Akwagyiram cites beer's traditional associations with health risks and obesity (the "beer belly"), and unglamorous working class preferences for the drink as two major reasons that pints of beer may not be selling like they used to. Other rationales for the decrease in sales are attributed to increased competition from wine and spirits, an increased presence of non beer-drinking women in British pubs, and the current trend towards upmarket or specialised pubs that may serve restaurant quality food, or cater to differing demographics rather than strictly to beer drinkers.

While sales of beer in pubs may be down from decades past, the progressive beer duty introduced in 2002 has sparked recent growth in new microbreweries. One brewer estimated that the changes in duty procedures save him fifty-thousand pounds a year in taxes and excise alone (Poston 2006). The progressive beer duty taxation system allows smaller brewers to pay less duty on their products and has been attributed to the recent explosion in small breweries across the United Kingdom. It must be pointed out however, that while dozens of new brewers have popped up across Britain in recent years, many microbreweries fail or are bought out each year.

Branding Britain

According to Hall (2003), total international tourism receipts in the UK fell from 5.2 percent of the market share in 1990 to 4.4 percent by 1999. As a result of this, it has been estimated that the tourism industry earned almost 2 billion Pounds Sterling less in 2001 when compared to the previous year. This decline has been attributed to sluggish international visitor numbers (Hall 2003). Through market research with potential tourists from abroad, Hall discovered that tourists identify a series of ‘focal points’ in British society that they view as attractive. These include the pub and the bed and breakfast in particular. These components of the hospitality industry are viewed as uniquely British institutions that are warm, friendly, welcoming and sociable (Hall 2003). These establishments are also positioned on the front line of the English culinary tourism industry. From purveying regional beers and ‘pub grub’, to offering guests a full English breakfast, these businesses constitute an important link between food and place, and have been identified as important components of Britain’s touristic image internationally. In addition to providing food and drink for locals and tourists alike, the public house has a

long and complicated history of integration, and in many cases legally-binding allegiances to the beer-brewing industry in the United Kingdom. The nature and history of this relationship is integral to any study of beer, hospitality and tourism and how they impact upon each other.

The British Pub and its Relationship with Brewers Prior to 1989

While literature borrowed from the field of wine tourism may constitute an essential starting point for any investigation into the nature of and potential for beer tourism initiatives, differences between the two should be recognised. A major difference between wine tourism and beer tourism in Britain concerns the ‘tied’ system of distribution that exists between brewers and the pubs that sell their products in the United Kingdom. As breweries in the UK often own and control pubs, this represents an already existing connection between breweries and the hospitality and tourism industry that is seldom found in other alcoholic beverage industries. For example, it is highly uncommon to find a winery or vineyard which owns and operates a chain of wine bars or restaurants, and that restricts the sale of competitors’ products within them. This relationship however, is still commonplace in United Kingdom’s pubs, and one could argue that any brewer who owns a public house is in fact taking part in a form of beer tourism, although it may be overlooked by the brewers themselves.

According to Pratten (2003), for much of the twentieth century up until the year 1989, many large British breweries made very high profits from the production and subsequent sale of their beers to pubs. But because the breweries also owned the pubs, they made further profits by selling their products to consumers. Brewers staffed their pubs with salaried employees to serve and manage customers. Due to this unique system

of product distribution, the breweries were often viewed as being in complete control over the distribution of their products.

The level of control and legal obligation that exists between a brewer and a public house varies greatly. Slade (1998) noted that prior to 1989 there were four types of public house in the United Kingdom. The “managed house” and the “tenanted house” are considered “tied houses”, while the “free house with loan ties” and the “free house without loan ties” are classified as “free houses” (Slade 1998).

The “managed house” is owned, managed, and staffed by brewery employees. The brewery sets prices, bears operating costs, and receives all the profits from the sale of drinks. The “tenanted house” is also owned by the brewery; however, it is managed and run by an independent entrepreneur or tenant who buys beer from the brewer at a wholesale price, pays rent to the brewer for use of the premises, but receives the profits from drink and food sales. Like any residential landlord, the brewery itself is responsible for major upkeep costs and improvements of the facilities.

The “Free house with loan ties” is owned by an independent entrepreneur or publican. Brewers provide capital to publicans at “below-market rates” (Slade 1998) in exchange for the exclusivity of their products being sold in the pub. However, it is the individual publican and not the brewer who finances and decides upon the nature and the extent to which capital improvements are needed at their business. The final contractual relationship between brewers and pub managers comes in the form of the “free house without loan” Here there are no legal or obligatory ties between pubs and brewers. Publicans may serve any brewer’s beer they wish.

The British Pub and its Relationship with Brewers 1989 to Present

In 1989 the United Kingdom Monopolies and Mergers Commission released a report that investigated this perceived monopoly in the British brewing industry and made a number of recommendations to protect smaller brewers and the consumer (Pratten 2003). The so-called “Beer Orders” which were soon passed by Parliament stipulated that large brewers were required to release their tie on half of all the pubs they owned above the accepted number of two thousand. The bill also required the release of ties on all other products sold in pubs other than beer, the termination of loan tie agreements by the recipient with three months notice upon the repayment of the loan, and that pub managers in tied premises were allowed to serve at least one cask-conditioned Real Ale from a supplier other the owner’s brewery (Slade 1998; Pratten 2003).

Following the Beer Orders, two new contractual relationships between brewers and publicans became popular on top of the four original categories. The “leased house” is owned by the brewer but operated under a long-term lease that is made to the publican. The pub managers buy beer wholesale from the brewer, set their own prices but are responsible for the upkeep and improvement of the facility. “Chain houses” have also risen in popularity. These establishments buy beer at wholesale prices through exclusive purchasing contracts negotiated by the chain management and brewers themselves. Aside from this feature, the pub operates as if it were a free house. The publican does not pay rent to a brewer and is allowed to set their own prices (Slade 1999).

Slade noted that the aftermath of the beer orders eventually led brewers to rid themselves of over fourteen thousand public houses that were previously in their possession. Since 1989 however, the number of independent pubs has actually decreased due to the rise in pub-owning chains that are not associated with brewers. Pratten (2003)

reported that large pub-owning companies are replacing brewers who used to own and operate the vast majority of pubs. This has led to increased competition in the hospitality sector, and the diversification of public houses beyond the traditional style of the community watering-hole. Today pubs that cater to customers interested in quality food, craft beer, live entertainment, student-friendly prices, sport, and other market segments are increasing in popularity beyond that of the traditional 'local' pub. The guest beer policy that was made law in the 1980's has since been scrapped by the current Labour government who claim that "full and fair competition exists in the brewing industry" (Protz 2007, p. 16). Pub owners in tied-houses associated with national brewers are no longer required by law to make available to customers one guest beer which is not brewed by the controlling brewery.

Summary

The literature review chapter began by introducing readers to the concept that food and drink constitutes a distinct and important part of a region's identity. These associations between a region and locally-produced specialities can be employed by tourism marketing boards and stakeholders to brand and differentiate the region from competitors. The author then focused attention on literature related to beverage tourism in general, with a particular emphasis on wine tourism literature as it is well-researched. The potential benefits and limitations of beverage tourism are discussed, as are alliances and partnerships between producers as well as public sector interests. Implications for consumers of beverage tourism are then noted, before the author considers the British context in which this study takes place. Literature on the current state of the brewing

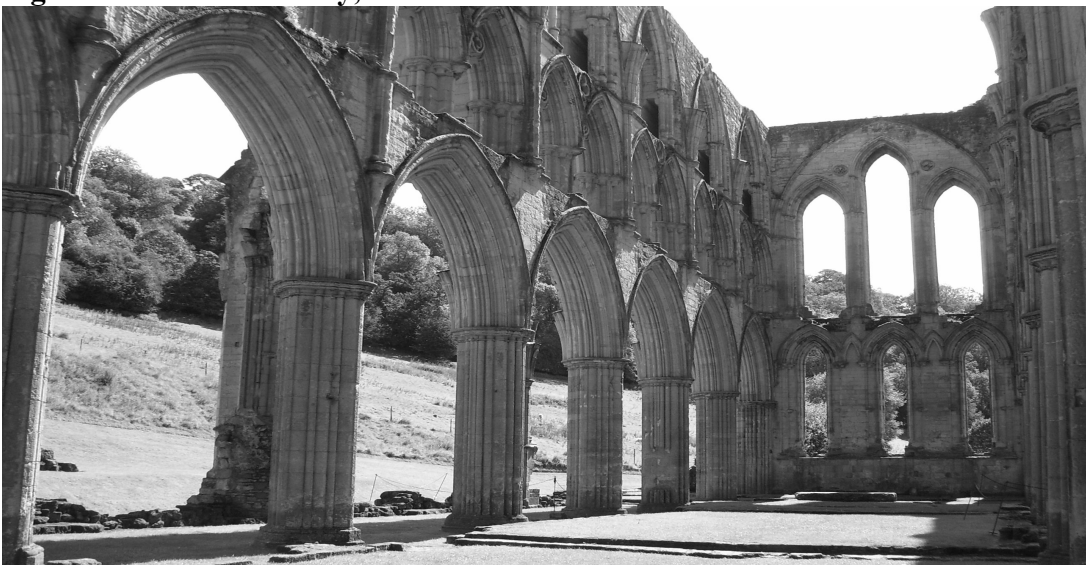
industry in the United Kingdom, as well as information on the complex relationship between brewers and the public house is discussed to conclude the literature review.

Figure 2: The rolling hills of the North Yorkshire Moors National Park



(Source: Photo taken by the author)

Figure 3: Rievaulx Abbey, North Yorkshire



(Source: Photo taken by the author)

III. RESEARCH METHODS

Data Collection Techniques

Introduction

This study employs a single-case study, mixed-methods approach to data collection. A mixed-methods approach entails using both quantitative and qualitative data collection techniques. While the author was primarily concerned with gathering rich qualitative data, some questions on the mail survey in particular were asked in order to collect quantitative information. These figures however, are of secondary importance to this thesis when contrasted with the primarily qualitative nature of the study. Several distinct data gathering methods were employed in order to gain insights that pertain to the specific objectives outlined in the first chapter of this thesis. The specific research methods used by the author are outlined below.

Mail survey

The first step in the author's data collection process took the form of a cross – sectional mail survey that was administered through the British postal service to almost every brewer in the study region. The sample that was used in this study will be discussed at length later in this section. The mail survey consisted of a mix of open-ended and multiple choice style questions and short answer questions to focus the respondent's attention onto issues relating to the five specific research objectives of the study. The mail survey that was sent out to Yorkshire breweries is included in its entirety as an Appendix to this thesis.

In particular, the survey examined the extent to which local breweries use beer tourism practices, identified the specific beer tourism techniques that breweries are using, and examined the partnerships, alliances, and linkages that may exist between local

brewers and other hospitality/tourism stakeholders in the region. Another section of the survey was concerned with questions that asked local brewery representatives to discuss the naming and branding of their beers, and the extent to which they advertise their products in tourism promotional material. These data were sought in order to explore the fifth objective of this the study which seeks to shed light on the use of beer and beer tourism in promoting Yorkshire to tourists.

The author anticipated that the questionnaire would take a responding brewery manager or executive no more than ten minutes to answer. This is a result of the mainly open-ended multiple-choice and short answer style of questioning that tends to promote a quick and simple response from participants. The format of the survey also allowed for varying levels of responsiveness from participating brewers. For instance, a busy or disinterested respondent could merely tick the appropriate selections provided on the survey, while a more involved participant could write-in their own answers and even elaborate on particular questions that they found to be important or interesting.

Considerations Regarding Mail Surveys as a Research Method

The author chose to administer the survey through the mail as Yorkshire is physically a very large region of the United Kingdom. Several breweries are situated in small hamlets that are difficult to access and others are located in towns that are not-easily reached by rail or other forms of public transit. Administering the survey in a face-to-face fashion would have been extremely costly and time consuming for a graduate student funding their research out of their own pocket. Both economic as well as time constraints made the option of a mail survey an attractive choice in this study.

Originally it was hoped that the survey would be sent out to brewers via email prior to the author travelling from Canada to England to undertake field research. It was thought that if the author could gather and analyze preliminary data prior to spending time in the field that more relevant and important follow-up questions could be asked to respondents in a face-to-face setting. However, this idea was abandoned because of concerns over the perceived likelihood of low response rates associated with email survey techniques.

Unfortunately, due to work commitments and a longer than expected ethics board approval process, the author did not have the time to pre-test the mail survey prior to administering it to brewers in the study's sample. Because of this, some instances of confusion over the wording of questions were reported by responding brewers. However, these concerns do not appear to be of any major significance to the overall findings of the study, and will be addressed in the discussions section of applicable chapters.

Brief informal interviews

The author conducted four brief interviews with brewery representatives during his time in the field. These five minute semi-structured interviews took place upon the completion of brewery tours which the author attended and at the Great British Beer Festival. While the author hoped to conduct more interviews than four, it was found that the pre-selected interview questions being asked to participants were very similar to the questions on the mail survey and thus were simply repeating questions asked through a different form of data collection. Because the mail surveys were sent to the author's home in Canada, the data on these surveys was not already analyzed prior to these interviews taking place and follow up questions could not be created from mail survey

data. Of course, face-to-face follow-up interviews would have been more useful to the author; however this was not possible again due to time and economic constraints. A list of the questions asked to participants during these face-to-face interviews, as well as the interview consent form is attached to this thesis as appendices.

According to Creswell (2003), interviews become useful when a participant cannot be observed directly. The author found that due to the infrequent nature of many breweries' tours in Yorkshire, that it was not always possible to attend a tour and gain first-hand experience about the structure or importance that this form of beer tourism may have for a brewer. In one case conducting a face-to-face interview at a beer festival allowed the author to gather important information on a subject without having the opportunity to attend that specific brewery's production facilities on a formal tour.

While face-to-face interviews may be important to many researchers' data collection strategies, Creswell (2003) noted that the data collected in an interview may be subject to bias. This bias may occur as a result of the interviewer's presence, as an interviewee may feel pressure to provide the researcher with responses that they think the researcher is looking to hear. Bias may also creep into interview results when an interviewee provides a researcher with information that they feel projects them in a manner which they would like others to observe.

Researcher's Observations

In total the author spent exactly one month of his time conducting research in the field. During this time, the author attended four different brewery tours and visitors' centres in the Yorkshire region. The selection of these breweries was not random. Rather, the author attended tours that were open to members of the general public who were not

in a private or pre-booked group. Luckily, the author happened to take advantage of one such brewery tour that was organised on a monthly basis and open to interested members of the public. This brewery visit just happened to coincide with the author's time in the field; the other three tours attended were run on a daily basis.

Ideally, the author would have liked to have selected a sample of breweries to visit that contained a varied cross-section of the Yorkshire brewing industry and included both large and small breweries, those with advanced levels of beer tourism development and those with more informal usage of brewery tourism. This, however, was difficult to achieve as it was found that many breweries take part infrequently in beer tourism practices and base their supply of beer tourism opportunities solely on visitor demand. Therefore, the author often found himself out of luck when contacting a brewer regarding the prospects of taking part in a tour.

Prior to taking part in these brewery tours, the author introduced himself to the brewery staff as a graduate student who was conducting research on beer tourism in the region. Therefore, the author can be seen as following the "Observer as Researcher" role within the category of qualitative observations (Creswell 2003). Before, during, and after the brewery tours, the author took extensive notes on everything that he experienced and used these notes as a key component of his overall data collection strategy.

The author was also afforded the chance to attend the CAMRA Great British Beer Festival which was held in early August of 2007 at Earls Court in London. The festival is a five-day affair and is by far the most-widely attended and prestigious beer festival in the United Kingdom. At this festival each year a "Champion Beer of Britain" is crowned. The author spent two days attending the festival and was provided with a

first-hand opportunity to experience beer tourism on its most impressive scale. Aside from providing the author with the possibility for short-interviews with brewery representatives, attending the festival also provided a chance to see how on-site brewery tourism techniques fit into the larger brand identity and overall marketing and promotional strategies of Yorkshire's breweries.

Each year many Yorkshire breweries send samples and representatives to the festival and 2007 appeared to be no different. From the author's own count, some twenty-six Yorkshire brewers were present at the festival. This number constitutes roughly half of all brewers in the counties of Yorkshire. They supplied thirty-four distinct beers out of a total of four-hundred and fifty beers to be sampled by the thirsty public.

Secondary Data Collection

While in Yorkshire conducting field observations, the author had the chance to visit several tourist board offices to gather hard-copy promotional material for analysis. Upon returning from the field, the internet was used to gather more promotional material on Yorkshire tourism as well. This literature was then subjected to a content analysis in an effort to determine if, how, and to what extent the Yorkshire brewing industry is in fact being advertised and promoted to potential visitors.

Overall, six visitor guides in hard copy were collected along with countless other leaflets and brochures that advertised smaller areas or individual cities and towns. Numerous regional and local tourism authority and promotional board websites were also accessed by the author upon returning from the field.

The author also visited the websites of applicable participating breweries. This was done in order to supplement the background information on the breweries that was

listed in the CAMRA 2007 *Good Beer Guide to Britain*. Information was gathered and organised from websites and used to create a file on every single participating brewery in the study. This process will be discussed further below in the Data Analysis section of this chapter.

Sample Selection

A thorough list of all known breweries in Yorkshire was created from CAMRA's *Good Beer Guide to Britain 2007*(edited by Roger Protz) and then cross-listed and compared with an electronic data base supplied by the website www.quaffable.org.uk. The yearly-published CAMRA Good Beer Guide contains recently updated contact information for every commercial brewery in Yorkshire. The list contains information on currently operating brewers from small brewpubs who supply only themselves with their products, to the large global brewers who supply thousands of outlets, retailers, and wholesalers with their beers. Brewers who are not currently brewing but have plans to restart are also included in the Good Beer Guide.

The list of all brewers in the region was meant to be as complete as possible, and therefore, no random or selective sampling techniques were utilized by the author of this study. The only brewer that was intentionally left out of the sample was Carlsberg's Leeds-based brewery. While Carlsberg operates a large factory in West Yorkshire, the brewer is a global giant with their headquarters in Copenhagen, Denmark. Carlsberg owns the *Tetley's* brand which is distributed around the world and was originally brewed in Leeds, but the global focus and multinational operations of Carlsberg appear to say little about Yorkshire's tourism industry or regional identity today. In total, surveys were sent out to sixty-nine brewers in the four ridings of Yorkshire. This specific sample may

be criticised by some as being unscientific, however it was felt that a non-randomly selected sample was a necessity in a study as specific as this.

Data Triangulation

The author has made every attempt at triangulating this study's research methods by using a number of differing techniques to gather data. Mail questionnaires and a content analysis of promotional material were selected due to their relative low-cost and ability to transcend physical distances. Face-to-face interviews were selected as an appropriate data collection technique due to the richness and depth of data that they may provide to a researcher. Participant observation was deemed essential to this investigation, as being in the region of study in person will yield observations that cannot be made from afar. Furthermore, secondary data collection through the internet and the *CAMRA Good Beer Guide 2007* provided the author with important background information on individual Yorkshire breweries, as well as specific data on the structure and frequency of their beer tourism practices.

Data Analysis

Survey Data Analysis

Upon receiving the completed surveys from participating breweries in the mail, the results of each individual survey question were tabulated using a tally chart on *Microsoft Excel* to determine the overall response rate. After double-checking these results to ensure that no mistakes were made in this process, the completed questions were broken down and sorted by their relevance to the five specific research objectives outlined by the author. Survey responses from each of the twenty-two questions were compiled for each individual question on the survey, as well as being sorted into

individual brewery responses. This was then arranged to create a brewery profile that would ultimately contain data drawn from the survey results, the Good Beer Guide profile, internet website material, interview transcripts and participant observation (if available).

This technique allowed the author to examine a certain issue on both the macro level (all responding brewers) and on a micro level (one particular brewer). Macro-level survey data were also broken down into percentages of the whole sample, and visually displayed in several charts and graphs in order to increase the ease of use for a potential reader of this research.

Interview Data, Participant Observation and Secondary Data Analysis

The four brief interviews that were conducted by the author were recorded on a digital tape recorder. These interviews were then played back and transcribed by the author upon his return from the field. The transcribed interviews were then added to the individual brewery profiles that were created from the survey responses and background information.

Notes made by the author from his experiences in the field were originally hand written on a note pad, but were then typed and printed upon returning from the field. All the rough data used in this study was compiled in hard copy rather than on a computer because the author felt that he could cut, paste, and manipulate the data more readily if available in hard copy. Secondary data gathered from brewery and tourism board websites was copied and appropriately cited, then subjected to the same coding techniques as all other pieces of data. This same process took place for data gathered from promotional material in catalogues and leaflets.

Coding Techniques

The specific interview transcripts were then coded as were notes made through participant observation and secondary data sources. Specifically, the author highlighted in ink what appeared to be the most important word or short phrase on each line of text that was being analyzed. This technique is better known as line-by-line coding, and as the author coded he continuously wrote memos regarding his interpretations, feelings, hunches, and concerns on sticky-notes and attached them to the raw data sheets.

A second level of coding referred to as focused coding was then conducted where the author disregarded information that he found to be superfluous to this particular study, and looked for patterns and common responses that related to one of the five specific objectives of this investigation. At this time the author made use of four distinct colours of highlighter markers to visually distinguish pieces of data from one another and to sort specific pieces of data into clearly-defined objectives. It must also be made clear that the fifth of the stated objectives of this thesis makes recommendations for brewery managers based upon the findings of this study, so in actuality the data collected in this coding process was only broken into four distinct categories that relate to the first four stated objectives. Data used in the fifth objective of the study was gathered from the findings of the first four objectives.

Once all of the data had been broken up into four distinct categories based upon their relevance to the author's first four stated objectives, the data were then separated and compiled with the survey data to create individual profiles of thirty-one breweries. Each of the thirty-one participating breweries was assigned their own booklet of data that contained information relating to all four of the author's research objectives.

Statistics for all participating breweries as a whole were kept separate and distinct from the brewery profiles. Furthermore information (mainly from tourism promotional material) that was not related to any of the brewers was also kept separate in a distinct profile booklet that could be used to complement data on individual breweries' marketing, branding, advertising, and tourism involvement if relevant.

Summary

The chapter began with an overview of the data collection techniques that were utilised by the author. As the primary source of data collection was a mail survey administered to Yorkshire brewers, a particular emphasis is placed on discussing issues related to mail surveys and the steps involved in preparing and disseminating the survey. Short interviews, researcher's observations and secondary data collection were also discussed in some length as these techniques were of secondary importance to the author's data collection process. The author then outlined how the specific research sample was selected, and highlighted some considerations associated with this before moving into a discussion of data analysis procedures. A step-by-step outline of the author's analysis, coding, and organisational processes is presented to conclude the methodology chapter.

IV. RESEARCH FINDINGS AND DISCUSSION

Objective 1) To examine the extent to which local breweries use beer tourism practices.

The Prevalence of Brewery Tours in Yorkshire

Findings

Overall, it was found that 61% of breweries in Yorkshire (19 out of 31 respondents) offer tours of their production facilities. This of course means that 39% (12 out of 31 respondents) do not allow interested persons who are not affiliated with the company to visit the brewery. These results have been gathered through a mail survey that was sent out to all known brewers in the study area. Overall, thirty-one breweries out of a possible sixty-nine completed the survey and returned it to the author. The first question on the mail survey simply asks “Do you offer tours of your brewery?” and then provides the appropriate “yes” or “no” answer to be selected by respondents. While the majority of breweries offer tours, twelve breweries currently do not and cite a number of unique reasons and circumstances for this. These will be discussed in some detail in a later part of this thesis.

The Regularity of Brewery Tours in Yorkshire

Findings

Responding brewers who had previously answered that they offered tours of their brewery were next asked a question to understand the regularity and frequency of the tours that they offer. Participants were asked “could you please describe the regularity of the brewery tours that you currently offer?” and were then provided with a number of different situations by the author, as well as a blank space in which they could write in alternative answers that were not listed on the survey. The respondents were asked to

select all the answers that applied to their current operations. The nineteen responding brewers who offer tours provide the following results, with two brewers selecting more than one answer (see Table 1)

Table 1: The Regularity of Brewery Tours in Yorkshire

<i>Type of brewery tour being offered</i>	<i>Number of responses</i>	<i>Brewers who offer this kind of tour (expressed as a percentage of all brewers who offer tours)</i>
Regular public tours available year round without advanced booking	5 of 19	26 %
Regular public tours available year round with advanced booking	13 of 19	68%
Public tours available without advanced booking in peak season only	0 of 19	0%
Public tours available with advanced booking in peak season only	0 of 19	0%
Tours for customers, trades people, and CAMRA groups only	2 of 19	11%

Discussion

Upon an analysis of the survey results, two similar responses that were provided by the author on the mail survey were ultimately pooled together. It was felt that the wording of the responses was quite similar, as was the meaning. The responses “regular public tours available year round with advanced booking” and “group tours available through advanced booking only” were merged together after the initial tabulation of data results. Both answers were identified as pertaining to brewery tours that were available to members of the general public that must be booked in advance. Through further research it was discovered that all responding breweries offer their tours in groups, so this minor difference in wording was deemed irrelevant and the two options were merged. One responding brewer happened to select both options in this question, and subsequently one

response was subtracted from the newly-created category to avoid “double-counting”.

It was found through the survey results that regular public tours made through advanced booking were by far the most prevalent form of brewery tour in Yorkshire. This category includes groups of friends, members of a club, team, organisation, or business for example that would pre-arrange to visit a brewery for a tour of the production facilities, and usually lots of beer sampling.

The Saltaire Brewery in Shipley, West Yorkshire is named after the UNESCO World Heritage Site located nearby, and has made a concerted effort to attract tourists to visit the brewery. Nonetheless, tours are not offered daily at regular intervals like at some other breweries in Yorkshire, but are provided for pre-arranged groups of more than ten people (Saltaire Brewery website 2007). While the brewery appears to be well set up for visitors with a mezzanine bar and even a brewing museum, they generally attract about two groups per week for tours in the evenings. Offering a limited number of tours in a given period of time appears to be the most common usage of brewery tourism in Yorkshire. Tours are usually offered on flexible, irregular intervals, often on weekends or in the evenings, and are most often pre-booked by a group of interested visitors. This may say something of the overall demand for brewery tours in the region. However, it must be remembered that the supply side of beer tourism, rather than consumer demand is investigated in this thesis. Nevertheless, only a few brewers felt confident enough in consumer demand to offer daily tours of their brewery run on consistent, set starting times.

While five breweries state that they offer public tours without advanced booking, the author could only confirm three of these responses through contact with the brewers

or from other sources such as the CAMRA Good Beer Guide, or brewery website. Therefore the statistic provided in Table 1 may be somewhat misleading. The T& R Theakston Brewery, Black Sheep Brewery, and the York Brewery all offered daily tours of their breweries that were open to the general public year-round, and took place on regular timed intervals. Breweries that offer this kind of predictable, consistent tourism product to the public may be viewed as being genuine tourist destinations rather than occasional suppliers of special-interest, or niche tourism products.

The two other breweries that claimed to offer regular public tours without advanced booking were Brewery 'D' from North Yorkshire, and Brewery 'A' from East Yorkshire (both did not give permission to be named directly in this study). The two breweries are both pubs that brew a small supply of beer for consumption at their own pub, and for a few other outlets in their local area. These establishments are typically referred to as 'brew-pubs'. Due to the very small size of the breweries themselves, it can be hypothesized that visitors could informally show up at these pubs and have a quick look around the brewing facilities. This situation however, is very different from the structured and organised forays into the tourism industry that have been made by the likes of the Black Sheep Brewery of Masham, North Yorkshire.

Furthermore, two responding brewers claim to offer tours only to customers, Campaign for Real Ale (CAMRA) member groups, and those in the licensed trade. Brewery 'B' from West Yorkshire, and H.B Clark & Co. also from West Yorkshire, were unique amongst responding breweries as they claim to not take tour requests from the general public, but rather use the brewery tours solely as a business tool. For instance, the respondent from H.B Clark lists that the major benefit of offering tours is to "strengthen

supplier-customer trading relationships.” This will be discussed further in a chapter on brewers’ perceived benefits of brewery tours.

Participation Rates in Beer Festivals by Yorkshire Brewers

Findings

All thirty-one responding participants were asked to answer the mail survey question “Does your brewery take part in beer festivals or beer industry shows”? It was found that the majority of Yorkshire breweries do in fact take part in beer festivals and shows (24 out of 31 or 77%), while only 23% (7 out of 31) currently do not.

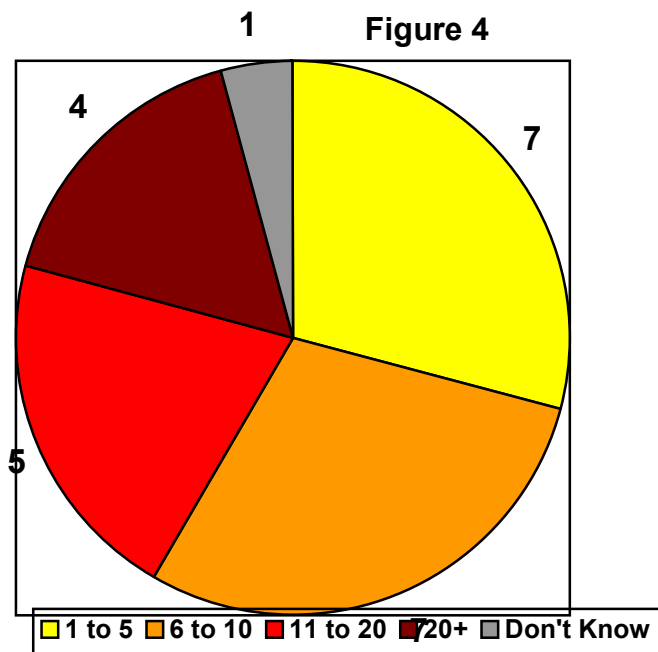
Discussion

The number of brewers who take part in beer festivals and shows is higher than the number of brewers who offer brewery tours in Yorkshire. This may be attributed to a number of explanations based upon the author’s observations. Most importantly, attending a beer festival does not require additional capital expenditures or the refurbishment of an existing brewery. In order to make a brewery “visitor friendly”, it will have to meet health and safety requirements for visitors, most likely be licensed to serve alcohol, and provide visitors with a somewhat aesthetically pleasing environment. These potential upgrades and expansions may all be of additional expense, and take up a brewer’s valuable time. Simply attending a festival with a couple of kegs or casks of ale and some promotional items such as beer mats is a much less capital-intensive undertaking. The perceived benefits and drawbacks for brewers who attend festivals will be discussed in greater depth further in this study.

The Popularity of Beer Festivals and Shows amongst Yorkshire Breweries

Findings

In order to assess how often Yorkshire’s breweries are taking part in beer festivals, the author asked all relevant participants the question “Approximately how many beer festivals/shows does your brewery take part in during a calendar year?” The overall response is varied, and provides this study with little that may resemble a unified or generalisable answer. Of the twenty-four brewers who had previously stated that they attend beer festivals or shows, only one brewer answered that they do not know, or are unsure as to roughly how many festivals their brewery takes part in during a year. The response from the other twenty-three brewers varies greatly, with more than half of respondents (58%) attending ten or fewer festivals per year. The full results of the question are displayed below in Figure 4.



Number of beer festivals attended by Yorkshire breweries in a year

Discussion

Two responding breweries put forward some concerns over the wording of the author's question. For Instance, Brewery 'H' from South Yorkshire commented that "It depends on what you mean by take part. We supply beer to dozens - 20 or more. We put significant effort (e.g. supplying people to man the stand) to one or two per year".

Another brewery, Brewery 'B' from West Yorkshire, noted that beer for festivals is often sourced through a third party, so they may be present at more festivals and shows than they are actually aware of. Regardless, Brewery 'B' selected the "20 or more" option in response to this question on the mail survey.

It appears that the author could have clarified the wording of the question to read "Approximately how many beer festivals/shows does your brewery supply beer for during a given calendar year?" This alternative wording would have avoided some confusion, for as the author found out while attending the Great British Beer Festival in London, the difference between merely supplying beer to a festival and manning a promotional stand are quite considerable. Unfortunately the limited time frame of this study did not facilitate the luxury of conducting a pre-test of the mail survey. A pre-test may have uncovered poorly-worded questions prior to the survey's distribution.

Brewer's Attitudes on the Role that Tourism may have for their Industry

Findings

Aside from merely determining the overall participation rates of Yorkshire's brewers in brewery tours and beer festivals, this study investigates the attitudes and rationales that drive brewers to participate, or forego participation in these forms of beer tourism. To shed light on the attitudes that brewers may have on using tourism practices

as a component of their overall business strategy, all participants who completed the mail survey were asked the extent to which they agree or disagree with the statement “There needs to be a greater recognition of the role that tourism can have for breweries”.

All thirty-one responding breweries answered the question. Five breweries (16%) stated that they “don’t know” if there needs to be a greater recognition of the role that tourism can have for breweries. This response rate was the same, (16%) as that of brewers who claimed to “disagree” with the above statement. No breweries responded that they “strongly disagree” with the statement however. This means that the overall response to the question was positive. More than two-thirds (68%) of respondents were found to either “strongly agree” or “agree” with the question’s statement. The most-selected response overall (14 out of 31 or 45%) was that responding breweries “agree” with the statement.

Discussion

The percentage of brewers who were found to agree or strongly agree with the statement regarding the role that tourism can have for brewers is roughly in line with participation rates for the two forms of beer tourism that are of primary interest to this research. While 68% overall agree with the statement, only 61% of responding breweries currently offer brewery tours. However, the number of brewers who are in agreement with the statement is in fact lower than the participation rate for beer festivals and shows (77%) that was previously reported. This suggests that there are brewers who are positive about the role that tourism can play in Yorkshire’s brewing industry, but currently do not offer tours. Conversely some brewers who take part in beer festivals feel negatively about the role that tourism can have for the county’s breweries.

Through coding and carefully examining background data that were compiled by the author for each participating brewery, several interesting anomalies have been uncovered. For instance, the Barearts Brewery from West Yorkshire does not currently take part in beer festivals, nor do they offer tours. Despite not actively engaging in beer tourism techniques themselves, the respondent from Barearts Brewery agrees with the statement regarding the greater recognition of the role that tourism can have for breweries. This may be based upon the fact that Barearts Brewery hopes to offer tours of their facilities in the future, or the fact that the brewery is also a nude art gallery and bar, and thus somewhat more integrated into other sectors of the economy than some other breweries may be. An interesting and unique brewer such as this may in fact be quite well-known to visitors and locals alike in their small corner of West Yorkshire.

Like the Barearts Brewery, another small brewer, Black Dog Brewery located in North Yorkshire, does not offer tours or take part in festivals, but strongly agrees with the question's statement. This may suggest that there are many factors, well beyond desire or attitude that prevent a brewery from using beer tourism practices. The limitations and potential drawbacks of beer tourism will be discussed at length in the next chapter.

On the other side of the coin, Brewery 'E' from South Yorkshire, attends one to five beer festivals or shows per year, but disagrees with the statement. This may demonstrate that brewers like those at Brewery 'E' are hesitant to get involved beyond the realm of brewing, but attend festivals in order to market their products or make business contacts. The second objective of this study is concerned with the rationales that brewers have for choosing to take part, or not take part in beer tourism and the perceived benefits and limitations associated with participation in tourism activities.

Figure 5: The Black Sheep Brewery Visitors Centre, Masham, North Yorkshire



(Source: Photo taken by the author)

Figure 6: The T&R Theakston Brewery and Visitor's Centre



(Source: Photo taken by the author)

Objective 2) To identify the specific beer tourism techniques being used by brewers in Yorkshire, and to evaluate the perceived benefits and limitations that these may offer to brewers.

The Structure of Brewery Tours in Yorkshire

Findings

In order to investigate the general structure and format of brewery tours in Yorkshire, the mail survey question “What does a tour of your brewery include?” was put forward to the nineteen brewers who had previously stated that they offer tours of their brewery. These data, along with information gathered by the author through participant observation on several brewery tours, and background research on Yorkshire’s brewers, were used to accumulate the findings presented in this section. The results tabulated from the mail survey are presented below in Table 2.

From the data it appears that most brewery tours in Yorkshire are structured in a very similar manner, with two notable exceptions that will be discussed below. All responding breweries (100%) claimed to offer visitors a tour of the production facilities used to make their products. This visit to the brewing facilities would appear to be the fundamental component of a brewery tour to most casual observers. Sampling of products also appears to be a common component of the tours, as does the introduction of ingredients used in the production of beers.

Table 2: The Structure of Brewery Tours in Yorkshire

<i>Activity being offered</i>	<i>Number of responses</i>	<i>Percentage of total responses</i>
Tour of production facilities	19 of 19	100%
Tutorial on how products are made	15 of 19	79%
Samples of products	16 of 19	84%
Company history/corporate information	14 of 19	74%
Tutored tastings	3 of 19	16%
Introduction to ingredients used in brewing process	17 of 19	89%
Opportunity to buy beer and company merchandise	10 of 19	53%
Cooperage demonstration	1 of 19	5%

Discussion

While all responding brewers in Yorkshire (100%) allow visitors to view their production facilities, this is not always the case elsewhere. For instance, the Guinness Storehouse in Dublin, Ireland where *Guinness stout* is brewed resembles more of a brewing and corporate museum than an active, working brewery. While the icon beer is brewed at St. James Gate on the premises, the production facilities are kept out of the public's view (Guinness Storehouse 2008). This appears not to be the case in Yorkshire, where visitors are encouraged to have a look around the brewing floor even, in some cases, when beer is actively being brewed.

Furthermore, the majority of responding breweries claim to present visitors with a tutorial on how their products are made (79%), samples of their products (84%), company history (74%), and an introduction to the ingredients being used in the brewing process (89%). While these numbers may appear high, the author was particularly surprised to learn that not all breweries that offer tours allow visitors to sample their products, or learn about the brewing process. The author cannot help but be sceptical of these results. Perhaps the lower-than expected response rates may be attributed to the speed at which the respondent have filled out the survey, or another factor relating to the order of potential choices on the mail survey. After all, visiting a brewery and then not being allowed to sample the freshly-made products would be a huge disappointment to most beer lovers.

Only three out of the nineteen brewers (16%) who answered this question on the mail survey claim to offer tutored tastings of their products. A tutored tasting would include a brewer's tasting notes on the company's products, and in some cases be quite

formally run by the head brewmaster or another expert. It appears then that most Yorkshire breweries take on a “show and tell” approach to their brewery tours, but this guidance stops when it comes time to sample the beers. Rather, the majority of breweries let their products do the talking, and allow visitors to have a taste, and then come to their own conclusions about the beer for themselves.

Only slightly more than half of all breweries (53%) that run tours provide visitors with the chance to take home the brewery’s own bottled beer or merchandise. Without a dedicated gift shop, it would appear to be difficult to sell scarves, coasters, and t-shirts emblazoned with the corporate logo to interested visitors. This figure may also indicate that vast differences in visitor facilities and tourism infrastructures exist between the county’s breweries.

Beer Tourism Visitors’ Facilities and Infrastructure in Yorkshire

Findings

In order to investigate the specific visitor facilities that Yorkshire breweries currently have at their disposal, the author asked the nineteen brewers who offer tours the question “Does your brewery offer any of the following facilities that may be used by visitors?” Respondents were then asked to select all of the possible answers that apply to their present operations. The results shed some light on the grass-roots nature of brewery tourism in Yorkshire. The majority of responding brewers (16 of 19 or 84%) claim to offer visitors a pub in which they may sample their products. This is usually referred to as the brewery tap, and need not necessarily be located within the confines of the brewery itself. The brewery tap may be owned and operated through the tied-estate of the brewery, or may even be an independent free house which is not obligated to serve a

company's beers. What makes the pub a brewery tap however, is its commitment to serving the full range of beers (or close to it) made by a local brewer.

Aside from supplying a brewery tap, only a few breweries in Yorkshire have made significant steps towards offering guests a wider range of facilities. For instance, four of the nineteen brewers who answered this question (21%) offer conference facilities, so the brewery itself may act as a potential setting for delegates converging at meetings or conventions. The same number of breweries (21%) offers a named visitors' centre facility. A visitors' centre would usually include but not be limited to a reception area, brewery tap, a gift shop, and, in some cases, a multi-media area to show visitors a company video – as is the case at the Black Sheep Brewery's visitors' centre in North Yorkshire.

Discussion

While only one responding brewery claims to offer a restaurant or a café in this section, the author was informed in another section of the mail survey that a second Yorkshire brewer has expanded into the restaurant business. The Riverhead Brewery, which is owned and operated by the Ossett Brewery, recently opened a restaurant in West Yorkshire. The restaurant uses many of the company's beers in the preparation of their dishes, and has received positive attention for their *Treacle Stout* sausage. The Black Sheep Brewery in North Yorkshire also contains a bar and bistro. The restaurant is open daily for lunch, snacks, 3-course meals in the evenings, special themed events and private occasions (Black Sheep Brewery website 2007).

While over half of responding breweries claimed to offer visitors a chance to buy bottled beer and company-branded merchandise while on a brewery tour, a significantly

smaller proportion (3 of 19 or 16%) of the respondents in this section claim to operate a brewery gift shop. This anomaly leads the author to question the accuracy of the selections made by responding brewers on the mail survey. While the number of breweries that do in fact operate gift shops could potentially be under-reported by using this particular research method, this small number is important nonetheless. The seemingly few breweries that run a company gift shop further demonstrates that lack of capital investment in visitor facilities that have been made by most brewers in Yorkshire. The continual operation and staffing of a small gift shop would require extra time, effort, and money, and this may not be plausible or advantageous for many smaller companies.

Factors that Limit Participation in Brewery Tourism

Findings

Aside from an unwillingness or inability to invest money in the capital expenditures that may be necessary to accommodate visitors, participating breweries list several important reasons for choosing to abstain from running tours. The question “If tours of your brewing facilities are not currently offered, could you please specify why this is the case?” was put forward to the twelve brewers who do not currently run brewery tours.

Two answers share the top spot as the most selected reason that Yorkshire breweries choose not to offer tours. The responses the “operation is too small” (5 of 12 respondents or 42%) and that the brewery wishes to concentrate “solely on brewing” (42%) are both important factors that limit tourism participation. Two of the twelve responding breweries (17%) selected the option “lack of time” as a reason for not offering tours. The lack of time that many Yorkshire brewers experience may in fact be

related to the small scale of their company. Another major set of concerns that are revealed through mail survey data and informal chats with brewers are issues of legal liability and government planning approval. The response “health and safety issues/insurance” was selected by 17% of brewer’s who did not offer tours, while “not licensed to serve alcohol” and “planning approval needed/restrictions” were each selected by one of the twelve responding brewers (8%).

Discussion

Through further research and participant observation, the author was quickly made aware of the small size and limited commercial scope of many of Yorkshire’s brewers. It would appear to be very difficult for some small breweries that may be run by only one or two individuals to carry on the primary functions of the business (brewing and distributing beer) and continuing to meet current output levels while running brewery tours on the side.

For many, the small scale of their operations and the related employee base they draw from may make any attempts at tourism potentially overwhelming. For instance, Rodham’s Brewery of West Yorkshire started off as a sole proprietorship based out of the basement of its founder’s home (although they plan on expanding) and as of 2007 supplied their beers to roughly seven bars and pubs in the local area (Protz 2007). The brewery respondent states that they do not offer tours because of their small size. A brewery such as Rodham’s, which can be described as a ‘micro’ micro-brewery, may have trouble not only attracting a significant number of visitors, but also in providing appropriate facilities, and finding the extra time in the day to accommodate them.

Other responding breweries such as the Fox and Newt of West Yorkshire, Brewery 'E' of South Yorkshire, and Bob's Brewing Company of West Yorkshire also cite that they are too small to offer tours. For instance, the respondent from Bob's Brewing makes note that the brewery itself is 3m by 4m in size and lacks storage room for full casks of ale, yet alone space for curious visitors. The frequent selection of the response "concentration solely on brewing" is of no surprise to the author, as brewing is of course the primary function of a brewery.

Health, safety, and insurance issues certainly should not be overlooked as well. For instance Brewery 'H' of South Yorkshire responds that their "...building is an old industrial unit, it's not very pretty. There are health and safety issues, and insurance. Also we are not licensed for the public". Brewery 'F' from North Yorkshire is another brewer with similar concerns. The brewery is well-known across the United Kingdom, and the author was informed through the Yorkshire Tourist Board that this brewery did in fact offer public tours. This information however this was found to be outdated when the author contacted the brewery directly. Brewery 'F' had to forego running tours as extensive remedial work to the brewery itself is required and this makes it unsafe for public access. Both Brewery 'H' and 'F' stated on the mail survey that they wish to concentrate solely on their brewing operations.

Another factor that may limit brewery tourism participation is gaining the appropriate planning approval from local governments. Yorkshire Dales Brewing Co., situated in a rural, agricultural corner of North Yorkshire, was unable to gain approval from local government and therefore cannot allow visitors. A brewery may choose to concentrate exclusively on brewing due to a number of factors such as a planning

decision made by the company’s directors, a lack of desire to welcome visitors or, as previously discussed, a restriction on size, capacity, total labour hours, or government certification.

Brewer’s Perceptions of the Benefits Gained by Offering Brewery Tours

Findings

It is interesting to explore why brewing companies offer interested visitors the chance to take a tour of their brewery despite the potential for extra staff and capital investments that may be part and parcel of this arrangement. In order to investigate this further, the author asked all nineteen relevant participants the question “What benefits do you feel your company receives from operating tours of your brewery?” The full responses are displayed in Table 3.

Table 3: Brewer’s Perceptions of the Benefits Gained by Offering Brewery Tours

<i>Benefit selected by respondent</i>	<i>Number of respondents who selected this benefit</i>	<i>Percentage of responding brewers who selected this benefit</i>
Increased on-site sales of bottled beer and merchandise	8 of 19	42 %
Greater consumer awareness of brands and products	15 of 19	79%
Additional revenue from tour entry fees	10 of 19	53%
Improved brand relationship with consumers	13 of 19	68%
Strengthening relationship with suppliers and costumers	1 of 19	5%
Generates goodwill in the community	3 of 19	16%
Additional revenue from sales of food or drink	6 of 19	32%
None	0 of 19	0%

Discussion

From an analysis of the responses from the mail survey, it appears as if the majority of brewers in Yorkshire believe that tours provide an excellent opportunity to

market and advertise their products. For instance, 79% of all respondents see “greater consumer awareness of brands and products” as a benefit that brewery tours provide. Another 68% selected the answer “improved brand relationship with consumers” when asked about the benefits that brewery tours provide. It appears that informing the public about products and strengthening a consumer’s association with a particular beer or brewery are very important benefits associated with brewery tourism.

Aside from the marketing opportunities and product awareness benefits associated with brewery tourism, a significant proportion of respondents make note of benefits that may be viewed as more immediate and pragmatic in nature. For instance, more than half of responding brewers (53%) claim to profit from the additional revenue that is generated through tour entry fees, while another 42% maintain that they benefit from increased on-site sales of bottled beer and company merchandise. While the increased marketing potential tours offer may benefit sales down the line, having visitors pay to enter the brewery and then purchase products at their source surely helps to impact upon the current fortunes of a brewery, especially a small one. The author has speculated on a model based upon a brewer’s relationship to tourism and the benefits that they may desire from offering tours and festivals. This will be discussed in detail later in this thesis.

It appears that the majority of brewers are interested in both the immediate benefits and the future benefits that brewery tours may provide. For example, Hambleton Ales from North Yorkshire lists the benefits of running tours as increased on-site sales of bottled beer and merchandise, greater consumer awareness of the brewery’s brands and products, and an improved brand relationship with consumers. This varied response was not untypical of most Yorkshire brewers who may yearn to expand and gain a larger

piece of the market, but at the same time are faced with stiff competition in their particular niche market for local Real Ales and often struggle to keep their heads above water. Because of this, both immediate and future benefits are sought when a brewery opens its doors to visitors.

Brewer's Opinions on the Perceived Drawbacks of Brewery Tours

Findings

One should not investigate the benefits of brewery tours without paying an equal amount of attention to the potential drawbacks and limitations that tourism may have for a brewery. In order to explore this topic, the author asked the nineteen brewers who previously stated on the mail survey that they offer tours the question “What may be some of the potential drawbacks of offering tours of your brewery?” The most commonly selected answer is that of “additional staff” (10 of 19 or 53%). This would include the hiring of a tour guide, extra staff to work behind the bar, or to run a gift shop for instance. The second most selected answer is “increased operating costs” (32%), followed by “additional capital expenditures in building visitor facilities” (26%), and “none” (also 26%).

Discussion

It is very interesting to note that the responses “additional capital expenditures in building visitor facilities” is selected just as often as the answer “none” – meaning that the responding brewer feels that there are no drawbacks to offering tours whatsoever. This appears to demonstrate a positive attitude towards brewery tourism on the whole. It must be taken into consideration however that the only brewers to answer this specific question are those who already offer tours. The data gathered in this section of the survey

do not take into consideration the twelve responding breweries that do not offer tours, and may feel that the drawbacks outweigh the benefits.

The option “lesser focus on beer production” was not selected by any of the nineteen responding brewers. It was observed that whether or not tour parties were present at a brewery, many brewers such as the York Brewery, and T&R Theakston carry on with their brewing as usual. The author also noticed through participant observation and by conducting research on brewery websites, that a significant number of brewers such as Ossett Brewing Co. from West Yorkshire only offer tours during evenings and weekends. These tours often take place during non-brewing hours. As some brewers offer tours during working hours and others do not, it appears that beer production does not diminish as a result of the presence of brewery visitors in most cases.

Regardless, the overall effects of visitors in a working brewery were not overlooked by one respondent. The answer “danger/damage to equipment by visitors” was written in as a suitable response by the Saltaire Brewery from West Yorkshire who are worried about damage to expensive brewing equipment and the personal safety of their guests while taking the tour.

Brewer’s Rationales for Participating in Beer Festivals

Findings

Aside from investigating the benefits and limitations that tourism may provide to those brewers who choose to make use of it, this chapter also examines the rationales that brewers may have both for and against participation in tourism practices. Brewers were previously asked about the benefits, drawbacks, and factors that limit their participation in brewery tours, and this section of the study now deals with participation in beer

festivals. In order to investigate this further, the twenty-four brewers who had previously stated that they attend festivals were asked the simple, straightforward question “Why does your brewing company choose to take part in beer festivals and shows?”

Taken as a whole, the most popular answer selected for this question of the mail survey is that brewers are taking part in festivals to “increase awareness of company’s brands and products” (19 of 24 or 79%). The second most selected answer by brewers is “to win awards and accolades” (50% of respondents). A significant proportion of respondents (6 of 24 or 25%) also claim to attend festivals in order to “represent the region on a national or global level”. Aside from current and future marketing opportunities, many brewers list more pragmatic and immediate reasons for taking part in beer festivals. Twelve of the twenty-four brewers (50%) note that they attend festivals in order to “make business contacts with pub owners and operators” and thus sell more beer in the immediate future rather than sometime down the line. Furthermore, 21% (5 out of 24) of responding brewers claim to attend festivals in order to sell their products and company merchandise. This again represents the very real prospect for increased sales and revenue.

Discussion

It appears that the publicity and brand exposure associated with attending a beer festival are very attractive pull-factors for breweries. After all, it is not necessary to have a potential customer visit your brewery or your brewery tap in order for them to try your products, when they can sample your ales at a festival along with dozens of other brands in one central location. Winning an award at a festival, such as the “Supreme Champion Beer of Britain” title or best in your beer’s class at the Great British Beer Festival or

another festival for example, becomes a unique selling point that many other brands cannot employ. Proudly displaying a beer's accolade on the bottle label or pump clip may tempt a beer-drinker who has never tried the brand to give it a taste. The survey results also suggest that a significant number of Yorkshire's brewers will often attend festivals in order to compete against beers from different counties in England, or countries in the world. When a Yorkshire beer does well at a prestigious festival it may benefit the other brewers in the region by enhancing the reputation and good name of the county's beers on a larger stage.

The majority of brewers profiled in this study list a variety of reasons for taking part in a beer festival. In most cases these relate to both current opportunities to sell products and potential opportunities that may present themselves in the future. The Golcar Brewery of West Yorkshire is one of the few respondents to cite that they attend festivals only to sell products and merchandise. This answer was atypical of the overall response. Hambleton Ales of North Yorkshire on the other hand cites only marketing opportunities such as the increased awareness of company brands, and winning awards and accolades as reasons for attending festivals. The majority of respondents comment on a combination of both sets of rationales.

Brewer's Rationales for Choosing not to Participate in Beer Festivals

Findings

On the other side of the coin, seven participating brewers who took the time to fill out the mail survey state that they do not attend beer festivals and shows. To examine this further, these brewers were asked the follow-up question "Why does your brewing company choose not to take part in beer festivals and shows?" Again, responses vary

depending upon the individual realities facing the brewery; however some interesting findings that prove to be quite similar to the rationales provided earlier for not offering brewery tours were reported. The full results of this question can be found in Table 4.

Table 4: Brewer’s Rationales for Choosing not to Participate in Beer Festivals

<i>Reason for not taking part in beer festivals and shows</i>	<i>Number of brewery’s who selected this option</i>	<i>Percentage of the total number of brewers who answered this question</i>
Additional costs	2 of 7	29%
Lack of time	5 of 7	71%
Few expected benefits	4 of 7	57%
Lack of staff	3 of 7	43%
No interest	2 of 7	29%

Discussion

Five of the seven brewers (71%) who do not attend festivals cite a “lack of time” as an applicable constraint. This lack of time may also be related to a “lack of staff” which was selected by three of the seven respondents (43%). This extracurricular marketing and sales opportunity may not be a plausible option for an already-busy brewery staff. The Anglo Dutch Brewery of West Yorkshire was founded by two men – one English, and the other Dutch, hence the company’s name. Anglo Dutch cites a lack of time as the only reason that they do not attend beer festivals. It appears that the staff of the Anglo Dutch Brewery is already constrained by their present business practices and cannot find the time to expand their small brewery’s scope. Additionally, two of the seven brewers (29%) claim to have “no interest” in attending festivals and shows,

compared to only 17% of brewers who claim to have no desire to operate tours. The category “no interest” may again be indirectly related to a lack of time, or lack of staff.

The author is surprised to find that four of the seven responding brewers (57%) claim that they see “few expected benefits” from attending festivals. These opinions stands in sharp contrast to the attitudes of numerous other Yorkshire brewers, many of whom cite several positive rationales for their company’s attendance at beer festivals.

The author speculates that those breweries that foresee few benefits from attending festivals may be limited by the capacity and scope of their brewing operations. For instance, tiny Bob’s Brewing Co. of West Yorkshire claims to anticipate few expected benefits from festival attendance. Bob’s Brewing is located in a small outbuilding behind a local pub; the operation is very small and may not have the means to meet additional order demands from eager beer festival patrons without an expansion of the brewery itself.

Brewer’s Attitudes on the Ease of Participation in Brewery Tourism

Findings

In order to determine participating respondents’ attitudes on the practicality of implementing brewery tourism, brewers were asked the extent to which they agree or disagree with a statement that reads “Turning a working brewery into a tourist attraction may be a daunting or unrealistic task for those who are primarily concerned with making good beer on a small-scale or regional level”. The author hypothesizes that breweries who disagree with this statement feel more positively about the use of beer tourism as a practical, implementable, endeavour. On the contrary, those who agree with the statement may feel that the adoption of brewery tourism may be

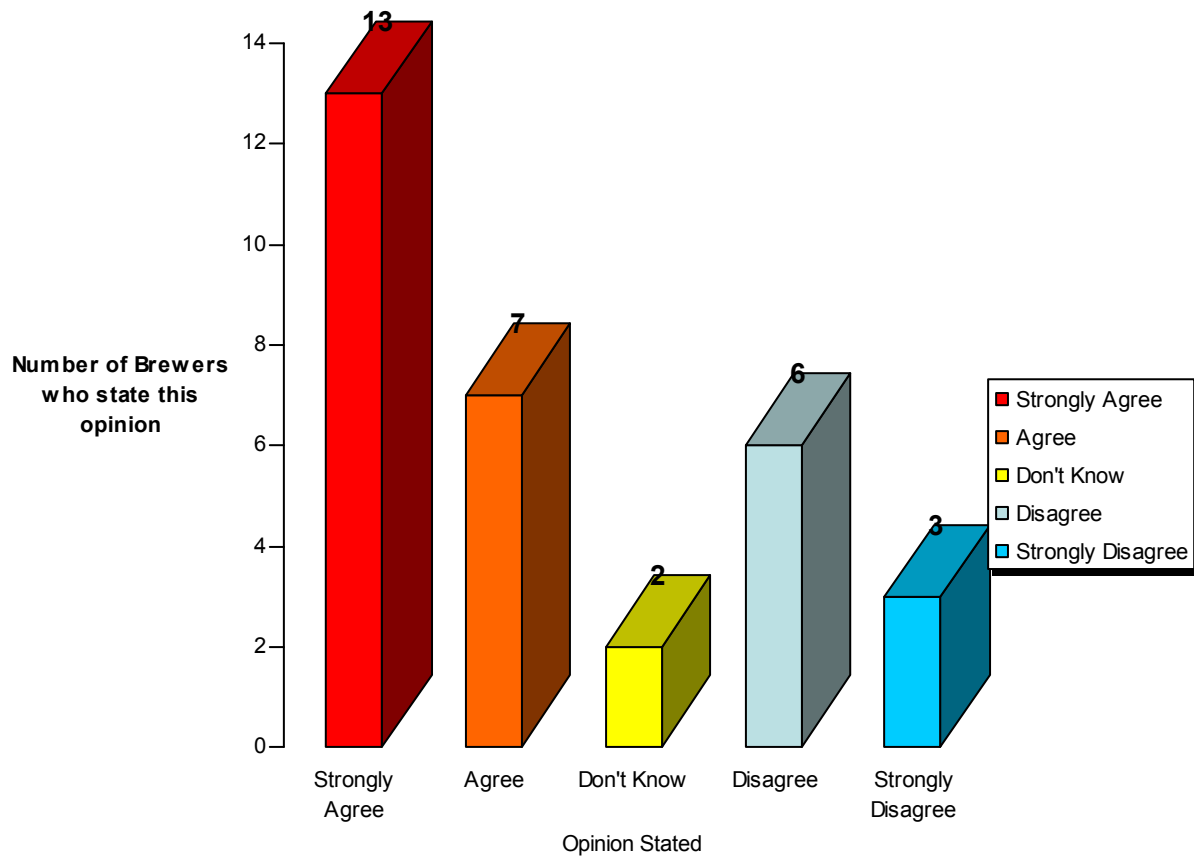
impractical or not worth the trouble for members of the brewing industry of Northern England as a whole. The results of this attitudinal inquiry are displayed visually in Figure 7.

The results demonstrate that a strong majority of Yorkshire brewers have serious concerns over the implementation of brewery tourism practices. Thirteen of the thirty-one responding brewers “strongly agree” with the statement, while another seven brewers also state that they “agree”. When these two responses are combined, almost two-thirds or 65% of respondents feel that turning a working brewery into a tourist attraction may be daunting or unrealistic, while only 26% (9 of 31 brewers) disagree with this idea.

Discussion

These results stand in interesting opposition to the findings of a previous attitudinal question on the mail survey which was interested in ascertaining respondents’ attitudes on the potential role that tourism may have for brewers. As earlier stated, the majority of responding brewers (68%) agree or strongly agree that “There needs to be a greater recognition of the role that tourism can have for breweries”. Several explanations come to mind to explain this significant difference. For one, brewers may feel positive about using tourism practices in theory, but are constrained by their own unique circumstances which may affect (either positively or negatively) their attitudes on the simplicity of tourism implementation. This would explain why a majority of brewers claim to desire a greater recognition of the role that tourism may play for brewers, but at the same time agree that turning a working brewery into an attraction would be unrealistic or daunting.

Figure 7



“Turning a working brewery into a tourist attraction may be a daunting or unrealistic task for those who are primarily concerned with making good beer on a small-scale or regional level”

Another rationale for this disparity may be related to the wording of the two questions. The author uses the term “tourist attraction” in this particular question, and this may have in fact given responding brewers the image of a large, multi-million pound visitors’ centre complex complete with a host of facilities and activities. The author did not wish to comment on the size or scope of the operation by using the term “tourist attraction”, but merely wished to express connotations of a brewery receiving visitors (tourists) from time to time. This was not made explicit and could have skewed the responses towards the “agree” or “strongly agree” side of the opinion results. Issues

over wording and individual interpretations of questions are certainly limitations that arise from conducting mail survey research.

The author also finds it surprising that several brewers who currently operate tours of their facilities claim to agree that turning a working brewery into a tourist attraction may be a daunting or unrealistic task. For instance, Brewery ‘C’ of South Yorkshire and Brewery ‘D’ of North Yorkshire both offer tours on a semi-regular basis through advanced bookings. However they also claim to agree strongly with the statements made in this particular question. Alternatively, several brewers who do not offer tours disagree with the statement and believe that turning a brewery into a tourist attraction would not be daunting or unrealistic. For instance, the Barearts Brewery currently does not offer tours, although they appear to feel very positively about tourism’s potential role for brewers overall. This may be related to the fact that they hope to get involved in brewery tours in the future. Of course, these differences in attitude may merely be attributed to variations in opinion between the unique participants of this study.

Figure 8: Earls Court in London. Home of the Great British Beer Festivals



(Source: Photo taken by the author)

Figure 9: Just a few beers on offer at the Great British Beer Festival 2007



(Source: Photo taken by the author)

Objective 3) To examine the partnerships, alliances and cooperation that may exist between brewers themselves and the tourism and hospitality industries in Yorkshire.

Cooperation between Brewers in Yorkshire

Findings

The author is interested in learning more about if, and how the many distinct brewing companies that are located in Yorkshire put aside competitive interests to work together for the betterment of the region's brewing industry as a whole. As a starting point for this inquiry, the question "To what extent does your brewing company work collaboratively with other brewers in the region?" was asked to all thirty-one participants. Again, the responses vary greatly from brewery to brewery; however some common trends were identified. A full record of the answers selected by brewers is listed in Table 5.

Table 5: Cooperation between Brewers in Yorkshire

<i>Collaborative activity between brewers</i>	<i>Number of times this answer was selected</i>	<i>Percentage of total respondents who selected this answer</i>
Little or no cooperation	9 of 31	29%
Sharing of production facilities or equipment	4 of 31	13%
Joint promotion/marketing	1 of 31	3%
Cooperation in the form of an ale trail or beer trail	6 of 31	19%
Word of mouth advertising	5 of 31	16%
Participation in local beer festivals or events	14 of 31	45%
Membership in a brewing organisation (such as the IFBB or SIBA).	17 of 31	55%
Sharing ingredients	1 of 31	3%
Sharing of operations and techniques through informal chats	1 of 31	3%
Swapping ales at brewery-owned pubs	3 of 31	10%

Discussion:

A significant proportion of brewers (29%) stated that they have “little or no cooperation” with other brewers in the region. The commonness of this response is quite surprising. From the author’s observations, most of those brewers who claim to have little to no cooperation with other brewers in the industry are amongst the smallest producers in this sample. However, brewpubs such as the Fox and Newt Brewery from West Yorkshire and Brewery ‘A’ from East Yorkshire, which only produce beer for their own pub and a few other outlets in their local areas, note that they have some significant ties to other breweries in the region. Therefore, size is most likely not the most important factor relating to the degree of cooperation between brewers.

The sharing of production facilities is identified as an appropriate response on four occasions (13%), while word of mouth advertising is mentioned by five different brewers (16% of total responses). The swapping of ales between brewery-owned pubs is

also identified by three different brewers (10%). In this example, a brewery would trade their own ales for another local brewery's ales, so as both participating breweries may serve the other's beers along with their own at a pub that they directly operate. The instances mentioned above are all examples of direct cooperation whereby brewers work together in an attempt to increase their own sales. Sharing ingredients, identified by one of the respondents, is another example of this.

From the survey data, it appears that much of the cooperative activity that takes place in Yorkshire's brewing industry is either indirect, or brokered through a third-party organisation. Three of the most highly-selected options on the mail survey are examples of this kind of collaboration. For example, seventeen of the thirty-one respondents (55%) claim to be a member in a brewing organisation such as the Society of Independent Brewers (SIBA) or Independent Family Brewers of Britain (IFBB). In this particular study, all respondents who state that they are members of a brewing organisation are members of the SIBA, as the only current member of the IFBB in Yorkshire declined to take part in this research.

The Society of Independent Brewers is an excellent example of an organisation that looks after the best interests of smaller and regional brewers such as those focused upon in this study. Formed in 1980, the organisation today has eight-hundred members made up of brewers, wholesalers, suppliers, and retailers (Saltaire website information on SIBA). SIBA operates a direct delivery scheme (DDS) which aims to connect "micro suppliers" to "macro customers" in an efficient, simply administered, cost-effective manner. The scheme involves providing logistical support and a central contact point for small brewers so they are able to deliver their products directly to retailers' outlets. The

official SIBA website notes that the SIBA DDS is “responsible for sourcing the beers, consolidating orders, processing payments to its members and managing deliveries to retailers” (SIBA DDS website).

Cooperation in the form of an ‘ale trail’ is cited by six respondents or 19% of the total number of brewers who agreed to take part in this study. The author could find no evidence to suggest that brewers in Yorkshire are actively involved in a highly-organised private sector or joint public-private sector initiative like the former Waterloo-Wellington Ale Trail in Southern Ontario or the thriving Malt Whiskey Trail in Scotland. Rather, it appears that the ale trails and beer trails that Yorkshire’s brewers participate in are operated on a grassroots level and often organised not by the brewers themselves but by third party groups. This includes local chapters of the Campaign for Real Ale which publishes regional beer guides that may include stops at brewery taps and affiliated pubs for example, and a multitude of beer websites that make note of the best pubs to visit in order to find local microbrews and Real Ale throughout England.

The responses selected by brewers in this particular chapter of the survey again do not completely corroborate with data found earlier in this study. In this particular instance, only fourteen out of thirty-one brewers surveyed (45%) state that they participate in local beer festivals or events as a form of cooperation with other breweries in the county. Compare this figure to data uncovered in objective one of this thesis, which notes that twenty-four of thirty-one Yorkshire brewers (77%) take part in beer festivals or events.

The author suggests several reasons for this difference in statistics. Firstly, many brewers may not feel that attending a beer festival or event in the local area is necessarily

a collaborative activity. Some brewers may see a festival as an excellent selling, marketing, or networking opportunity, but an event that has nothing to do with cooperation between various brewers in the region. Secondly, it is possible that several respondents have simply selected the first response listed in the answer section. This response is listed as “little or no cooperation” and because they selected this answer, the respondent did not read all the options that were available to them. This may be due to the wording or order of the question itself, and explain the higher than expected response rate describing the lack of collaborative behaviour between brewers, and the lower than expected response rate pertaining to beer festival participation.

Lastly, this specific question provides the answer “local beer festivals or events”. The question pertaining to participation in beer festivals that was asked earlier does not take location into consideration. It is possible that some of the difference between the two statistics may be attributed to the addition of the word ‘local’. It is conceivable that some brewers may seldom take part in local festivals but rather concentrate their efforts on less successful or more lucrative markets further a field.

The Relationship between Yorkshire’s Brewers and the Tourism Industry

Findings

The author is interested in further exploring the relationship that may exist between brewers and the tourism and hospitality industries in the four counties of Yorkshire. In order to provide some general statistics and to determine areas to be researched further, the author asked all thirty-one participating brewers the question “To what extent does your brewing company currently work collaboratively with businesses in the hospitality and tourism sector of the economy?” The results of this question are

displayed in Table 6. Please note that the response “direct ownership /operation of pub(s)” was pooled with the response “direct ownership/operation of guest house or hotel” by the author. This was done because many pub(s) operate guest rooms above the main level bar, or elsewhere on the property and drawing a distinction between a pub and a pub with guest rooms was thought to be unnecessary.

Discussion

Much as in the previous question, the findings of this section of the study are surprising to the author who has always considered the brewing industry to be an interrelated web of suppliers, producers, marketers, distributors, wholesalers, and pub and restaurant owners/operators. From an analysis of the survey results, an even greater number of brewers (32%) claim to have “no cooperation, partnerships, or alliances whatsoever” with the tourism and hospitality industries. For instance, several breweries of differing size, such as the Selby Brewery of North Yorkshire, note that they do not work collaboratively with other brewers or with other associated companies in the tourism and hospitality industries.

The most-selected reply to this question was that Yorkshire brewers made their beers available at non-affiliated pubs or restaurants that they did not own or operate themselves through a tie (55% of all respondents). Although greater than fifty percent of all brewers selected this option, the author was still anticipating a higher selection rate than what was observed. Supplying pubs with beer can be seen as the primary activity of a brewery, and the fact that almost fifty percent do not sell their beers at pubs aside for the establishments that they operate was quite surprising. For instance, Black Sheep Brewery of North Yorkshire owns no pubs; however they supply over seven hundred

independent pubs and pub chains across England with their beer, as well as wholesalers who distribute their beers to several major British supermarket chains, and around the world to distributors such as the LCBO in Ontario (Black Sheep website).

Table 6: The Relationship between Yorkshire’s Brewers and the Tourism Industry

<i>Relationship with the hospitality and tourism industry or specific relationship</i>	<i>Number of brewers who selected this response</i>	<i>Percentage of the total number of brewers</i>
No cooperation, partnerships, or alliances what so ever	10 of 31	32%
Direct ownership/operation of pub(s) and guest houses	14 of 31	45%
Beers made available at non-affiliated pub(s) as a guest beer	17 of 31	55%
Referrals to local accommodation providers or restaurants	6 of 31	19%
Connections with local tour operators	4 of 31	13%
Providing facilities for special events	6 of 31	19%
Relationship with local tourism office or promotional board	8 of 31	26%

Another often-selected response was that Yorkshire brewers directly own and/or operate pubs and guest houses (45%). Again, while this figure approaches half of all responding brewers, the author has found evidence through secondary sources that reveals that this statistic is somewhat under-reported. For instance, Brewery ‘F’ of North Yorkshire owns two-hundred pubs across England, including several popular spots in London (Protz 2007). However on the mail-back survey, the option “direct ownership/operation of pub(s)” was not selected. Similarly, the York Brewery of North Yorkshire owns at present three pubs in the city centre of York (York Brewery website 2007). However, the response “little to no cooperation” with businesses in the tourism and hospitality sectors was selected on the mail survey issued by the author.

Perhaps this discrepancy can again be related to the wording of the question and the inherent lack of depth often associated with survey research techniques. Because brewers are asked to what extent they “work collaboratively with businesses in the hospitality and tourism sector”, they may only have provided information based upon their relationships with other companies, and neglected to provide the author with information on their own involvement in hospitality and tourism. Another explanation may be that some brewers see owning and operating pubs as part and parcel of running a brewery in Great Britain and consequently do not see these activities as being a part of a wider tourism or hospitality industry.

From the survey results, it appears that several breweries have what can be seen as a more direct or upfront relationship with the tourism industry in Yorkshire. For instance, eight of the thirty-one brewers (26% of all respondents) claim to have a relationship with their local tourism office or the regional promotional board. This relationship could potentially take the form of the brewery advertising within promotional tourism material, active promotion of brewery tours by the tourism board, or specific attraction signage such as that which is found in Masham, North Yorkshire – the home of both the Black Sheep and Theakston’s breweries and visitors’ centres.

Another four responding brewers (13%) make note of their connections with local tour providers who may include a stop at the brewery itself, or at an affiliated pub when providing tours of the local area. Six responding breweries (19%) state that they often make referrals to local accommodation providers and restaurants in their area, thus directly affecting the tourism and hospitality industries on a micro level.

The Ossett Brewery of West Yorkshire appears to be a rare example of a Yorkshire brewer that not only owns pubs, but also operates a restaurant. The restaurant's menu incorporates a variety of the company's beers into the recipes served to its guests, all while the brewery plans to continue to expand upon their tied pub estate. The Ossett Brewery appears to be well incorporated into the surrounding tourism industry, and even hosts a beer festival at one of their pubs in Huddersfield, West Yorkshire. In 2007, Ossett Brewery hosted an 'Open Day' complete with a BBQ, brass band, mini tours of the brewery and a charity raffle (Ossett website open day). Not to be outdone with regards to their participation in tourism, the Black Sheep Brewery also runs a bistro located in the visitors' centre of their brewery. On top of this, they host the Black Sheep Music Festival that takes place every summer at the brewery, as well as sponsoring local charity events and village festivals in and around Masham (Black Sheep website 2007).

Objective 4) To examine if, and how tourism stakeholders draw upon beer and brewing to promote and market the region to tourists, and the role that brewers may play in this process.

Brewer's Opinions on Beer's Usefulness as a Tourism Marketing Tool

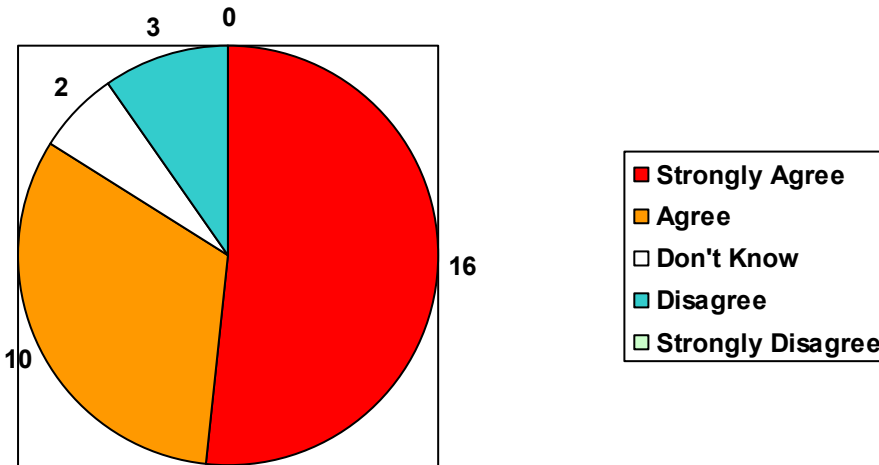
Findings

The author is interested in exploring how brewers feel about the role that their products can potentially play in marketing Yorkshire to tourists. To uncover brewers' attitudes on this process, all thirty-one participants were asked to identify the extent to which they agree or disagree with the following statement: "Yorkshire's brewing industry is world renowned and should be highlighted in tourism marketing material in order to attract more tourists to the region". It is of interest to this study to gauge brewers' opinions

on their particular role in the tourism industry and how they may feel about having a role to play in the marketing and promotion of Yorkshire to outsiders.

As suspected, an overwhelming majority of respondents either agree or strongly agree with the specific statement listed above. The results of this question are displayed in a pie chart (Figure 10). Over half of the thirty-one responding brewers (52%) replied that they “strongly agree” that Yorkshire’s brewing industry should be highlighted in tourism marketing material, while a further 32% claimed to “agree” with the statement. Two of the thirty-one respondents (6%) did not know or had no opinion on the statement. Not surprisingly, only three brewery representatives claimed to “disagree”, and no respondents strongly disagreed with the statement.

Figure 10



“Yorkshire’s brewing industry is world renowned and should be highlighted in tourism marketing material in order to attract more tourists to the region”

Discussion:

It appears that the majority of Yorkshire brewers would encourage their local, regional, or county tourism boards to provide potential visitors with plenty of information on the rich history of brewing in Yorkshire, and on the present-day beers that are concocted in the area. The reasons behind this are obvious; free publicity (both direct and indirect) for brewers and a more beer-savvy tourist heading to Yorkshire to spend their money on pints of ale within the local economy.

Nevertheless, it may be of further interest to investigate the outliers in this data set. These would be the brewers who do not feel that Yorkshire's tourism marketers and promotional boards should use beer as a selling point to attract visitors. There are some interesting reasons that that author can hypothesize to account for this difference of thinking. Most simply, these respondents may feel that Yorkshire has so many other selling points to offer tourists that pushing beer imagery or providing information on local beers would be trivial or of lesser importance than say, providing visitor information on Yorkshire's stunning national parks.

Another possible answer may be that the respondents from these breweries are not major supporters of tourism in the region to begin with, and may discourage outsider intrusions whenever possible. Perhaps more follow up data would shed some light on this issue; however this is not possible as the brewers in question did not make themselves available for any additional correspondence with the author of this study.

How Beer is utilized by Tourism Marketers in Yorkshire

Findings

A content analysis of tourism promotional material was undertaken by the author in order to explore the extent to which beer and brewing are drawn upon by marketers to

entice potential visitors to choose the Yorkshire region as a holiday destination. Hard copy promotional materials such as visitor's guides were gathered by the author from tourism offices in the field, and material was collected from online sources through the internet.

It appears that the amount of information and imagery related to local food and drink varies greatly depending upon the specific visitor's guide or website that is studied. *The Yorkshire Dales Official Holiday Guide 2007*, for instance, dedicates an entire page in their publication to displaying enticing pictures and descriptions of local pastries, cheeses, meats, and of course, beer. While beer certainly plays a part in a section of this guide, it is only a component of the overall presentation that focuses on all locally-produced food and drink. In particular, a small photo of several wooden casks containing Theakston's ales is included in the bottle corner of the page; however an image of Yorkshire's famous Wensleydale Cheese takes the most commanding spot in the collage.

The Yorkshire Dales Official Holiday Guide(2007) presents a well-rounded view of Yorkshire's tourism infrastructures and attractions which includes considerable information on the natural environment, local history, activities, attractions, and accommodation. To a lesser extent, the *Yorkshire Dales Official Holiday Guide* (2007) mentions the town of Masham that is home to two of the more involved brewers with regards to their participation in brewery tourism. The town is highlighted again in a separate section on market towns in the Yorkshire Dales, and a brief description of the brewery tours and contact information for both of Masham's breweries is listed. On another page in the guide, information on market towns and a small photo of two bottles

and a hand pump of Black Sheep beer is included. Again, this picture sits in the bottom right hand corner and is much smaller than several other photos on the page.

In comparison, the *Ryedale Holiday Guide* (2007) features a significant amount of information and imagery concerning this corner of North Yorkshire's tremendous natural beauty. Pastoral images of farm houses and stately homes set amidst the pink heather of the North Yorkshire Moors National Park are common, as are shots of the ruined abbeys and castles that dot the landscape. There is no page dedicated to local food and drink alone, although a small blurb and photo of a local brew is included on a page related to customs and village life. The blurb mentions that this particular brewery (which declined to take part in this research) has won several awards for their beers, and takes their beer names from local people and places, a theme that will be investigated further in this study.

At first glance, tourism information about Yorkshire on the internet varies little from that found in print. No references to food and drink are made on Britain's official tourism website's profiles of the major Yorkshire cities of Leeds, and Sheffield. This changes when exploring the *Visit Britain* profile for the city of York. Aside from drawing attention to the city's two-thousand years of history, several references to tea shops, bars, restaurants, and a food and drink festival held in September are listed. Regardless, it may not surprise the casual observer that no direct mention of the town's well-known brewery is included in such a short overview (Visit Britain York, 2007)

On the other hand, the official tourism website for the city of York offers a significant amount of information and imagery about food and drink. The site claims that "York has a pub for every day of the year" and the York Brewery is mentioned directly in

the introduction at the top of the page (Visit York, Eating and Drinking 2008).

Information of pubs, local produce, farmers markets, tea rooms and restaurants all figure prominently on the page.

Discussion

It can be suggested that due to the increased amount of space that is available to display information on the internet in comparison to a print brochure, there is more room to highlight niche tourism markets like those associated with culinary tourism or, more specifically, beer tourism. As a result of this, individual pubs as well as brewers may be profiled in more depth than they would be in such a space-constrained medium such as a print travel guide.

It appears that many county, regional, and city tourism promotional bodies in Yorkshire display information on local beers in their material. This however is considered of lesser importance than information on attractions and accommodations, and used merely as a small component of the greater theme of culinary tourism and locally-produced specialities. When more space is available for information to be displayed, then a greater amount of beer and pub-related information can be displayed for the beer-loving tourist to enjoy.

Yorkshire Breweries Willingness to Advertising in Tourism Promotional Material

Findings

While it appears that Yorkshire's tourism industry promoters may draw upon beer-related imagery such as a quaint village pub or traditional horse-drawn delivery drays from time to time, the author was interested in uncovering information on the extent to which brewers were actually willing to pay out of their own pockets to advertise

their products both locally and further a field. As a starting point for this inquiry, all thirty-one participating brewers were asked the mail survey question “Do you advertise your beers or tours of your brewery in any regional tourism guides, magazines, pamphlets or publications?” While not relying solely on survey data, information was also gathered from the author’s own observations in the field, and through an analysis of brewery promotional material. The author feels that it is important to determine if Yorkshire’s brewers are actively targeting tourists and those beyond their local region in their advertising. If this turns out to be the case, a greater connection between beer producers and the tourism industry itself may be noticeable.

The results of the survey data are mixed; however a greater number of respondents (55%) state that they do not advertise in regional guides, magazines... etc, while a further 45% (fourteen out of thirty-one) claim to do so. It appears as if each brewer’s advertising strategy is as unique as the ales that they produce. For instance, Barearts Brewery of West Yorkshire claims not to pay for advertising; however they state that they do “get lots of free publicity”. This is most likely related to the fact that this small brewery not only produces beers, but also runs a bar and sells nude artwork.

The Saltaire Brewery, also of West Yorkshire, does in fact pay for advertising, but is well aware of their role as a producer of Real Ale, and part of a niche market that comprises hundreds of micro producers competing for a small share of England’s total beer market. It may be because of their smaller role in the overall beer market that Saltaire targets their advertising accordingly. While Saltaire has taken out a full page ad in a local feature, they also advertise in several Real Ale magazines in hopes of enticing Real Ale fanatics from in and around Yorkshire to buy their products and visit

their brewery. Other responding brewers note that they only advertise their products in local CAMRA publications in order to target this niche market. For instance, Brewery 'C' of South Yorkshire claims to advertise exclusively in speciality magazines such as *Ale Talk*.

Discussion

Faced with small total operating budgets, yet alone marketing budgets, many of Yorkshire's brewers must be highly selective about where they focus their advertising. As will be discussed later in this thesis, the local market is by far the most important for a majority of Yorkshire's breweries and because of this, locals are the primary target of brewery marketing material. If beer advertising is only being viewed by those in the immediate area that surrounds the brewery, then it is unlikely that this advertising material will have any affect as a pull-factor in attracting tourists to the region. While many of Yorkshire's breweries are well-known throughout England, and even Europe by beer aficionados, it may be highly unlikely that a potential visitor to the region may be swayed to travel by a particularly delicious-looking pint of bitter in a brewery advertisement.

Beer imagery may be a very ineffective weapon in attracting visitors to a specific region of a country that boasts dozens of breweries in most of its counties. After all, there are no specific geographical and climatic conditions that limit indoor beer production, unlike wine growing regions which gain regard due to the unique combination of climate, soil type... etc. However, once a tourist has chosen Yorkshire as their holiday destination, the county's brewing industry, which is steeped in tradition and prestige, may provide an additional treat to complement the region's overall tourism package.

A number of Yorkshire's major beer tourism participants choose to target potential visitors. Particularly in North Yorkshire, the author came across a substantial amount of beer and beer tourism marketing material in promotional guides, visitor information packages, and on racks of tourist leaflets. In particular, the York Brewery, Theakston Brewery, and the Black Sheep Brewery all make their presence felt, and of more interest to this study, all advertised their tours quite extensively.

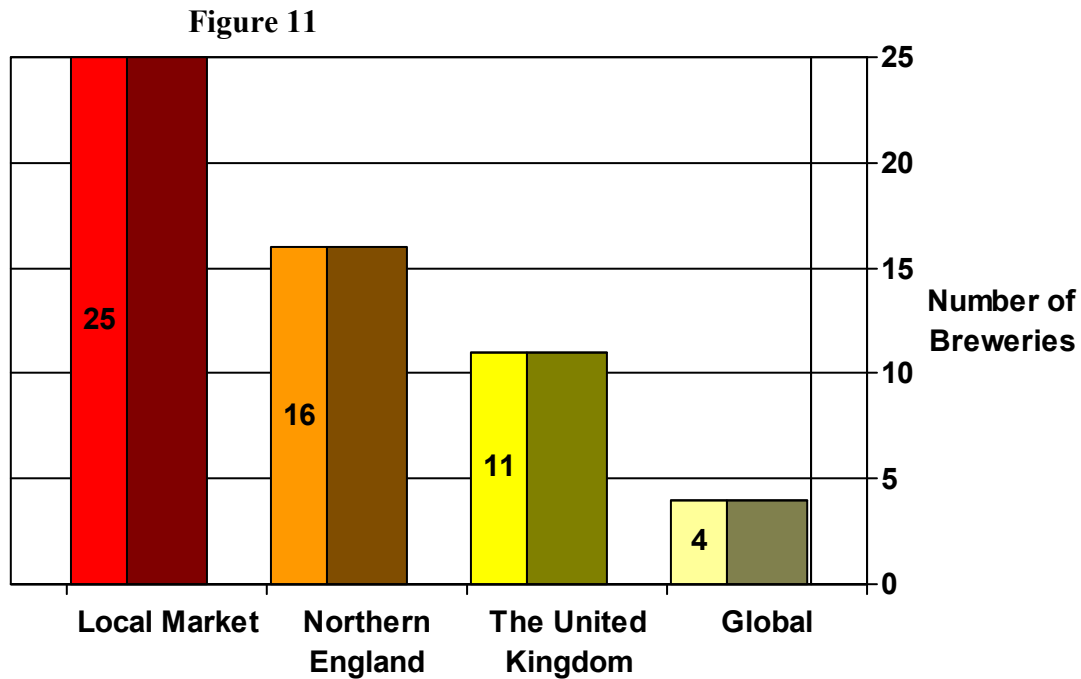
At a hotel in York, the author opened up a large, leather-bound catalogue that was displayed on his desk to find two beautiful, double-sided, full colour advertisements for both the Theakston Black Bull in Paradise Visitors' Centre, and The Black Sheep Visitors' Centre. Furthermore, leaflets from these two breweries, as well as one from the York Brewery, were free for the taking in the tourist information office at York's train station. In a city that receives as many tourists as York, competition in the brewery tour business actually appears to be thriving!

The Importance of the Local Market in Yorkshire's Brewing Industry

Findings

As a continuing step in exploring objective four in more depth it would be beneficial to determine what markets are in fact the most important for Yorkshire's brewers. Are Yorkshire brewers producing beers that will be consumed primarily by customers in the same city, town, village or local area as the brewery itself, or will these products be shipped many miles away to be consumed? All thirty-one participants were asked the simple question, "Which markets do you feel are the most important for your brewery?" and were then instructed to select all the markets that they feel are important

to the success of their business. The results of this question are displayed in a graph in Figure 11.



“Which markets do you feel are the most important for your brewery?”

It is not surprising to find that 81% (25 out of 31) of all responding brewers state that the local market is important to them. Furthermore, sixteen out of thirty-one brewers (52%) note that the entire North of England is an important market as well. The author found it quite interesting however to discover that almost a third of all respondents (35%) claim that the entire United Kingdom is important to the success of their company, and another four breweries state that the international market is also important.

Discussion

This emphasis on the surrounding local area and the neighbouring counties is not surprising considering the relatively small size and output levels of most of the brewers in this sample. Logistical concerns and a lack of capital would be important barriers in restricting the shipping of Yorkshire beers over great distances. Despite the emphasis on the local markets, several breweries state that they ship their products throughout the country, and even around the world. This demonstrates that a small minority of Yorkshire's brewers are able to overcome the obstacles that may impede their abilities to do business on a much larger scale. It was not surprising to find that somewhat larger and better-known companies such as the York Brewery and the Ossett Brewery were concerned with markets beyond just the local, while smaller brew-pubs generally were not.

It was considered important to be aware of which markets Yorkshire's brewers feel are the most important to them. This is because the location of a brewery's customers may impact upon how a beer is marketed and the amount of exposure to the county and its products that beer drinkers who do not live in Yorkshire may receive. For instance, if a brewery only supplies its ales within a radius of twenty miles around their location, then few beer drinkers in other parts of the country will have the opportunity to sample their products. Thus the potential beer tourists that an area receives would most likely be diminished. This emphasis on the local market may also affect instances of neo-localism in the branding of Yorkshire beers. This will be investigated further in the following section.

The Importance of a Yorkshire Image in Beer Branding

Findings

Tourism boards in Yorkshire sometimes use images of the county's well-known and respected brewing industry to complement imagery and information on the beautiful natural landscape, rural character, and impressive history of Yorkshire. On the other hand, the author thought that it would be interesting to determine if Yorkshire's brewers are drawing on this same imagery of their county to brand their own products, and sell their beers. All thirty-one participating brewers who took part in the mail survey were asked "As a Yorkshire brewery, do you feel that creating a brand image which may be viewed by consumers as "distinctly Yorkshire" is important?"

The results of this question, like those of several other questions in this study are mixed. While a solid majority of the brewers claimed that a Yorkshire image is important to them (65%), a significant minority stated otherwise (26%). Many brewers provided detailed rationales as to why or why not they feel that this is the case.

Discussion

County pride is clearly evident in a number of responses from brewers who hope to translate feelings of localism and regionalism into increased beer sales. Bear in mind that the local market is overwhelmingly the most important for most of Yorkshire's brewers. The respondent from the Saltaire Brewery in West Yorkshire feels that creating a "distinctly Yorkshire" brand identity is important because "Yorkshire has a good reputation overall and in particular is renowned as a place where great beers are produced." The response from Saltaire not only considers the quality of the beer produced in Yorkshire, but the county's reputation as a whole. As the respondent from Hambleton Ales of North Yorkshire points out, "Yorkshire is a brand known globally". The York Brewery's assertion that a Yorkshire image is important because the county is

“God’s Country” says much about many in the county’s sense of humour and great pride in where they come from.

Many other respondents tend to focus strictly on beer however. For instance, the respondent from Brewery ‘E’ notes that “Yorkshire is renowned for good beer and particularly Real Ale”. This theme is expanded upon by the Yorkshire Dales Brewery in North Yorkshire which states that “Yorkshire has a great tradition of brewing. Looking into that history and taking it forward is a way of selling your beers”.

Other respondents note that a “distinctly Yorkshire” image is important because of the necessity to support local trade. Brewery ‘B’ of West Yorkshire brings attention to the significance of beer’s role in creating a “sense of region” for the county itself and also for the county’s brewing industry. Wensleydale Brewery’s respondent notes that the “clean environment and spring water and the beauty of the North Yorkshire Dales are excellent marketing tools”. This answer may sound more like one that would be supplied by a tourism marketer rather than a brewer, but using the association between Yorkshire and its pure, clean, and unspoiled landscape appear to be quite popular marketing techniques.

A significant number of participating breweries did not feel that a “distinctly Yorkshire” image was of any importance. In two instances this attitude was the result of geography. The small Barearts Brewery in West Yorkshire caters mainly to the local market; however this local market consists of an area of roughly thirty miles in diameter that includes both Yorkshire, and traditional Northern rivals Lancashire. A very Yorkshire-friendly brand image could potentially alienate the equally proud Lancashire

beer drinker who may not purchase a beer called ‘White Rose’ or ‘Tyke’ – both allusions to their Yorkshire neighbours to the East.

This sentiment is also expressed by Brewery ‘H’ of South Yorkshire. While the brand does use neo-localism in the branding of their particular beers, they do not feel that a Yorkshire image is important. The respondent notes that they are close to the counties of Derbyshire and Nottinghamshire, and that “A Yorkshire image helps us to sell in Yorkshire but not to Derbyshire or other counties”.

Another response given by brewers is that the region in which a beer is produced means little in today’s competitive market. The respondent from Brewery ‘G’ states that the product should sell itself and that the Yorkshire brand identity should merely be an extra. HB Clarks & Co. from West Yorkshire goes so far as to note that it is of far more importance to “portray the beer as quality” as well as informing the drinker on the type of ale that they are purchasing. This argument is driven home by the Marston Moor Brewery in North Yorkshire which states that “many pubs look for new names and are not bothered where the beer came from (e.g. Yorkshire Best Bitter). The quality of the beer sells before any name”

The Prevalence of Neo-localism in the Branding of Yorkshire’s Beer

Findings

In a study of the Canadian beer industry, Eberts (2006) noted that smaller breweries, much like the majority of those participating in this study, tend to cater to a local or regional market. This finding is corroborated by results taken from this thesis which find that the most important market for Yorkshire’s brewers is the local market. Eberts claimed that because of this, brewers have a much greater propensity to use local

history, place names, or physical characteristics of the local environment in their branding strategies, as their beers are produced for and consumed mainly by customers close to the area of production.

This technique attempts to capitalize on neo-localism and feelings of community or county pride. This may also be important in creating a distinct regional beer culture that can be drawn upon by tourism promotional organisations and representative bodies such as the Yorkshire Tourism Board, or the Deliciously Yorkshire campaign which promotes local food and drink products to consumers from the present-day counties.

As previously stated in the literature review, the concept of neo-localism can be seen as the desire to “reembrace the uniqueness and authenticity of place” (Jordon-Bychkov and Domosh 2003). In order to determine the extent to which Yorkshire’s breweries may draw on neo-localism as a way of branding their products, all thirty-one participants were asked “Does your brewing company use local, historical, place names, or physical characteristics of the local environment in your branding and naming of your products?” Twenty five breweries or 81% state that they use neo-localism in the naming of their products, while six (19%) said that they do not.

Discussion

While the statistics gathered from the mail survey question appear to demonstrate that the majority of Yorkshire’s breweries use neo-localism in the branding of their beers, data gathered from secondary research and content analysis reveal that this statistic is not as clear cut as it may appear. For instance, while a majority of brewers claim to use local place, historical, or physical names in the branding of their beers, the question does not ask brewers to identify the regularity with which this takes place. As a result, the author

finds that some brewers who report using neo-localism in their branding exclusively use local features, while other brewers who also answer positively only make use of the occasional reference. Much like previous findings on tourism participation rates, the brewers involved in this study run the gamut from using local references in the naming of all their products to using neo-localism quite sparingly.

A brewery that relies on neo-localism almost exclusively is the Yorkshire Dales Brewery. The brewery is located in the heart of the Yorkshire Dales region of North Yorkshire and brands its ales with names such as *Herriot County Ale*- named after *All Creatures Great and Small* writer James Herriot. Several other beers are named after local peaks and areas of wilderness. Another brewery located in the picturesque Yorkshire Dales is the Wensleydale Brewery. Much like their compatriots at Yorkshire Dales, the brewery relies almost exclusively on physical place names taken from within their small corner of the county. For instance, ales like *Hardraw Force Strong Ale* and *Black Dub Stout* take their names from a waterfall and a deep river pool respectively (Wensleydale brewery website 2007).

The specific nature of the references made by these brands of beer would most likely be unfamiliar to anybody outside of the Wensleydale area. An immediate link would probably not be produced in a consumer's mind between the historical county of Yorkshire and the specific beers names. The name of the brewery itself is quite well-known nevertheless, as Wensleydale cheese is a favourite of many throughout the United Kingdom and abroad.

While place names appear to be the most popular with Yorkshire's brewers, several others take on more unique themes in the branding of the products. The

Whalebone Brewery in East Yorkshire uses the city of Hull's traditional association with the whaling industry as a unique point of sale and brands their beers with names like *Neck Oil Bitter*, and *Moby Dick* (Protz 2007). The Old Bear Brewery's logo is a pint-quaffing bear dressed in traditional Yorkshire flat cap and waistcoat. Aside from beer names that one would associate with bears, the brewery sells beers named after famous literary figures such as the Bronte sisters and their characters like *Heathcliffe Ale* (Old Bear website 2007).

The Ossett Brewery of West Yorkshire has released a collection of ales called the Yorkshire Legends Series, which includes ales named after Yorkshire-born Captain Cook and Joseph Priestley amongst others. The Marston Moor Brewery, named after the largest battle of the English Civil War which happened to take place in the county, not surprisingly draws upon the war to further brand their ales. *Cromwell Pale Ale* is a particular example of this (Rudgate Brewery website 2007).

The York Brewery includes the line "York's One and Only" on the logo of all their products, and produces several beers that are named after the city's rich history. For instance, *Centurion's Ghost* is a reference to the city's Roman past, and its claim to being one of the most haunted in England. *Stonewall Cask Bitter* is another of the York Brewery's ales, and the logo of the beer informs consumers that the beer was brewed within the city walls of York (York Brewery website 2007). A more obviously named beer is York's *Yorkshire Terrier Cask Bitter* which draws upon the image of the county's famous breed of dog in order to attract consumers. This particular beer may be much more obviously 'Yorkshire' to a potential consumer in another part of the country or abroad.

A significant number of brewers in Yorkshire do not rely on neo-localism in the branding of their beers however. For instance, the respondent from Rodham's Brewery states that it does not use local place names or physical characteristics... etc. because they want their beers to be "distinctly different" from other competitors in the area. Other brewers focus on themes and images that cannot be seen as pertaining to a Yorkshire image. For instance, names that identify the particular variety of hops that are used to flavour the beer are quite common, as are catchy or interesting names that sound more like characters from a novel than ales from a traditionally rural county.

The Theakston Brewery and Black Sheep Brewery are two of the most enthusiastic proponents of beer tourism in Yorkshire, as well as two of the county's best known brewers. Both breweries run regular tours of their facilities, attend festivals, and advertise their tours and products quite extensively. Despite this, Black Sheep and Theakston use only a minimal amount of neo-localism in the branding of their beers. Black Sheep boasts a beer called *Emmerdale*, which is an area of Yorkshire and a popular television drama, and *Riggwelter*, named after a Norse word and local colloquialism for when a sheep has fallen on its back and cannot get up. The label on the bottle of *Riggwelter* proclaims that it is a "Strong Yorkshire Ale" and a map of the local area around Masham sits in the background behind the bold writing on the label. Despite this, only a few names that may be seen as synonymous with Yorkshire are drawn upon by one of the region's best-known companies.

T&R Theakston's, it appears, uses even less neo-localism in the branding of their ales. Aside from a seasonally-sold beer called *Masham Ale* that refers to the town where the brewery is located, few other instances can be identified by the author. Also it

should be noted that Masham is a small town in North Yorkshire that took the author several hours to reach from York without the aid of a car. It may not be well known to those who are not beer ‘aficionados’ or local residents. Theakston’s beers are distributed all across the UK, and the company chooses to emphasize the family’s prestigious name over the county’s reputation for producing fine beers as a whole.

It is unlikely that the naming of Theakston’s or Black Sheep’s specific beers have much of a relationship to the number of tourists they attract to their breweries. The breweries appear to be popular with Real Ale fans across the county and throughout England despite not overtly displaying their Yorkshire heritage. Perhaps it can be concluded that while neo-localism may attract locals to purchase a beer, it has not been demonstrated to relate to beer tourism attendance. Also, further research must be conducted to determine if beer branding and the creation of a ‘beer region’ have any impact as a pull factor influencing tourist visits to a specific area.

Figure 12: The historic City of York, North Yorkshire



(Source: Photo taken by the author)

Figure 13: Children ride donkeys along Scarborough Beach in North Yorkshire



(Source: Photo taken by the author)

Figure 14: The Yorkshire Dales 1 mile outside of Masham, North Yorkshire



(Source: Photo taken by author)

Figure 15: Sheep congregate along the road by Castleton, North Yorkshire Moors



(Source: Photo taken by the author)

Objective 5) To make recommendations for brewery managers and regional marketing boards based upon the specific findings of this study.

The Implementation of Beer Tourism Practices: Some Considerations

Discussion

Throughout this thesis, the author has investigated the potential benefits as well as limitations that implementing beer tourism practices, in particular brewery tours and beer festivals, may have for Yorkshire's breweries. This section of the study briefly summarizes these findings and reminds brewery stakeholders of several important considerations.

When considering an expansion into the world of beer tourism, a brewery must be realistic about their revenue, the size and scope of their operations, and the specific goals that they wish to achieve through the use of tourism. While this study did not investigate consumer demand for beer tourism products, it must be recognised that beer tourism is a

niche market; a small component of a sub category of tourism known as culinary tourism. Certainly, the demand for these kinds of products is in no way comparable to the demand associated with the sun and sand that mass tourism resorts offer. Beer tourism in Yorkshire is constrained by the relatively small but passionate number of beer drinkers, who enjoy Real Ales usually produced by micro-breweries, and the relatively small size of the region's producers.

Of course the benefits of offering tours and attending festivals are numerous. Both tours and festivals provide brewers with increased marketing and consumer awareness opportunities, while allowing for further contact and quality assurance capabilities between the brewer and those in the licensed trade, or other existing and potential customers. Additional revenue is generated through brewery entry fees, facilities like restaurants and visitors' taps, and through the sale of company merchandise and bottled beer that visitors may take home with them. This may be of particular importance to very small producers who are struggling to keep their heads above water.

While adopting tourism strategies as a component of a brewer's overall business plan certainly has its benefits, constraints and limitations may be numerous in some cases. Taking part in additional activities such as brewery tours or festivals means additional work for brewery employees who, in many cases, are in short supply. Making a brewery 'visitor friendly' may also mean further expenditures to bring the brewing facility up to code, and to beautify a space that in the past was exclusively used for beverage production. The supplementary costs and time commitments may be in some cases enough to discourage a brewer from getting involved with tourism in the first place.

The author can neither condone nor recommend that Yorkshire's brewers get involved beyond the realm of mere production and cater to visitors. Certainly there are costs and benefits associated with this development. From the attitudinal questions included on the mail survey, it appears that most proponents and practitioners of beer tourism are quite positive and content with their decision, while those brewers who are not taking part in tours or festivals also stand by their resolutions. In both cases, some exceptions were found to this conclusion, but they were not the norm in relation to the entire sample.

While tourism is certainly beneficial to Yorkshire's brewers in several ways, the author could not overwhelmingly endorse the construction of a major visitors' centre over the expansion of a small brewery's output capacity or bottling facilities. As is evident by the infrequent and informal nature of most of the beer tourism enterprises in the region, the demand for beer tourism may be seen as extensive. Breweries ultimately should aim to produce and sell good beer and not rival historical sites or natural wonders as major tourist draws in their area.

The inception of a formally-administered and well-marketed ale-trail in Yorkshire could potentially benefit both brewers and those in the local and rural economy. Many would view a brewery tour as constituting a substitutable form of tourism product, and of course there is a limit to the amount that a visitor can safely drink and still be able to drive. Therefore it would be imperative to the success of such a venture to diversify the products and services available to tourists beyond beer and drinking alone. For instance, vertical alliances between breweries and local restaurants and hospitality providers would

be of importance to such a venture, as would government funding to help supplement the costs of signage, pamphlets, official website... etc

The Role of Beer in Tourism Marketing Material

Discussion

From an investigation into the usage of beer imagery by Yorkshire's individual tourism marketing boards and agencies, as well as exploring the prevalence of neo-localism in the branding of ales created in Yorkshire, the author has made some conclusions regarding the role of beer as a tourism marketing tool. As the local market is the most important for most brewers, the effects of Yorkshire branding and imagery on non-residents as a pull factor to visit Yorkshire may be diminished. If a potential consumer or visitor is unable to find Yorkshire beers at their local pub in other parts of the UK, Europe, and the World, then it is difficult to argue that beer will have much of a part to play in attracting tourists. Rather, the beers of a region such as Yorkshire may help to enhance a visitor's experience in the area, and contribute to their overall enjoyment. This may affect repeat visits for a small number of die-hard beer lovers who are so impressed with a particular beer that they just cannot find back home that they simply must return.

Beer may be a minor selling point in tourism marketing material for a region with as much to offer as Yorkshire. An emphasis on Yorkshire's craft ales may correspond nicely to the overall impression of Yorkshire as a historical, traditional, agricultural and wild county in Northern England. The author speculates that even in beer Mecca's such as Munich and Brussels, beer imagery may only play a minor, albeit not insignificant role in the overall marketing strategy of the destination. While many enjoy beer, there are

notably fewer people who will travel to an area to drink beer and visit breweries as a primary motivating factor in choosing their destination. These conclusions are of course observations based upon beer tourism supply data and personal observations made by the author and must be investigated empirically in other studies undertaken from the demand-side.

Protected Designation of Origin Status for Yorkshire Beers

Discussion

Recently the Society of Independent Brewers has made a formal proposal to the Department of Environment, Farming and Rural Affairs (Defra) to have “Yorkshire Beer” recognised as a distinct and unique regional delicacy (Tingle 2008). At the time of writing, Defra is deliberating on the proposal prior to a decision being made on whether or not to pass along the proposal to the European Commission for recognition as a Protected Designation of Origin (PDO) product. As mentioned earlier in the literature review, PDO status legally confines the production of a product to within the boundaries of a certain area and protects against the production of a specific product outside of its designated region. Currently, the only Yorkshire product to have been granted such a status is Swaledale cheese. The famous Wensleydale cheese is also currently in the processing of applying for PDO status.

PDO status for all Yorkshire beer could potentially complement the existing branding practices of many Yorkshire brewers in the region who use neo-localism in the naming of their beers. Protected Designation of Origin status would also provide a unique selling point for the region’s beer producers that can only be matched by a handful of geographic areas in Europe. The PDO status could also be drawn upon by tourism

marketers to further highlight the importance of the role that beer plays in Yorkshire life, and the uniqueness and quality of the beers themselves.

Beer Tourism Classification Systems

A Typology of Breweries based upon their Involvement in Beer Tourism Practices

Through an analysis of data gathered by the author throughout the course of this study, it is believed that all of the responding Yorkshire breweries fit into one of the five categories listed below. This typology is based upon a brewer's overall involvement in brewery tours, beer festivals and special events, the structure of these activities, a brewer's rationales for using tourism, and their attitudes and opinions on the importance and usefulness of brewery involvement in tourism and hospitality.

1) *“Attraction” Breweries*

Breweries in this category overtly use beer tourism practices for their benefit. The brewery is a tourist attraction in itself, and is open for tours at regular, predictable times. All of the breweries that can be placed in this category are open daily, all year round for brewery tours. While more tours per day are generally offered in the tourist high-season of the summer months, daily tours are still run on regular intervals in the fall and winter months.

Attraction Breweries will always offer guests the use of brewery facilities for special events, corporate functions and even weddings. Like all breweries in Yorkshire that offer tours, Attraction Breweries are also available to be pre-booked by groups wishing to spend an evening touring the brewery and enjoying the products that they produce. Attraction Breweries have a well-developed tourism infrastructure which contains a visitors' bar with washrooms, and a gift shop selling company wares and

bottled beer. Some brewers in this category may even offer guests the chance to enjoy a meal at a brewery-run restaurant, or have dedicated conference facilities and multi-purpose rooms.

Attraction Breweries are generally characterized by a positive attitude towards the use of beer tourism practices. Furthermore, brewers belonging to this category tend to be quite well-known nationally and even internationally. This appears to be a necessity in order to provide a potential visitor with a familiar name to entice them into visiting the brewery. The Attraction Brewery category is made up for the second fewest of all breweries that agreed to take part in this study. Examples of Attraction Breweries include Black Sheep, T& R Theakston's, and the York Brewery.

2) *“Participant” Breweries*

Participant Breweries are the most commonly encountered category of brewers in this study. A Participant Brewery is characterized by their strong use of beer tourism overall, and will offer tours as well as take part in beer festivals, and sometimes even offer visitors the use of brewery facilities for special events and affairs. The major difference between an Attraction Brewery and a Participant Brewery lies in the structure and regularity of the brewery tours being offered. While an Attraction Brewery will present visitors with the chance to visit any day they desire, a brewery visit must be pre-booked (and usually in a group) if one wishes to visit a Participant Brewery.

All breweries belonging to this category take part in beer festivals, but the total number of festivals attended in a given year may range from only a few to several dozen. The Participant Brewery group is considerably less homogeneous in its composition than the Attraction Brewery type. Attitudes on the use and importance of tourism for

breweries range from very positive to rather indifferent and are even negative in a few uncommon instances. Some Participant Breweries such as the Saltaire Brewery, may offer all the same facilities as an Attraction Brewery, including tours, conference and special event services; however they are differentiated from brewers in the latter category by their unpredictable, infrequent or even ‘part-time’ dedication to their brewery tours.

Participant Breweries may be quite new to the English brewing scene, smaller, or less well-known outside of their immediate locality when compared to Attraction Breweries. Examples of Participant Breweries that have taken part in this study include the Saltaire Brewery, Kelham Island, Wensleydale Brewery, Hambleton Ales, and the Ossett Brewery.

3) “Promotional” Breweries

The third and smallest category of breweries in this proposed typology is referred to by the author as the Promotional Breweries. Promotional Breweries use beer tourism practices such as tours, festivals, and special events only if these practices may directly affect immediate or future beer sales. While Promotional Breweries may attend festivals that are open to the general public, breweries in this group are differentiated from members of the Participant Brewery group because they will only allow customers, trade groups, or CAMRA chapter groups to go on tours of their production facilities.

Simply put, Promotional Breweries do not allow curious onlookers, casual observers, passers-by, or those with an interest in how beer is made to visit their brewery. Guests must be customers, potential customers, or serious supporters in order to gain access to the production facilities. While Promotional Breweries also attend beer festivals, they appear to focus their attention on activities such as networking with pub

owners and operators and other marketing activities that may increase their total sales rather than selling merchandise or trying to convert the local populace to become a loyal devotee of their ales.

Promotional Breweries do not appear to be concerned with the additional revenue that brewery tours or special events such as parties and weddings may provide. To a Promotional Brewery, beer tourism is simply another aspect of their overall marketing strategy and not a direct means of creating revenue. A Promotional Brewery can be any size; one such brewery in this study is well-known as United Kingdom-wide wholesaler. Opinions and attitudes on beer tourism were found to be mixed amongst those breweries in this grouping. Brewery “B” and HB Clarks and Co. are examples of Promotional Breweries that agreed to take part in this study.

4) “*Enterprising*” Breweries

Breweries that may be categorized in the Enterprising Brewery grouping take part in one form of brewery tourism, but have not made a solid commitment to the use of tourism as an extension of their business model. The most common incarnation of an Enterprising Brewery would be a brewery that attends the occasional beer festival, but does not offer brewery tours, or visitors’ the use of brewery facilities for special events.

The majority of breweries that fall into the Enterprising Brewery group are small in size, and a number of these may be classified as brewpubs. There are no observable commonalities amongst brewers’ in this category in attitudes and opinion on the usefulness that tourism may play for Yorkshire’s beer producers. A number of these breweries can be seen as “in-flux”, either expanding or scaling back production in a

competitive environment. Other breweries may be quite new, or limited by a lack of capital to invest in visitor facilities and/or further expansions.

Overall, Enterprising Breweries can be seen as trying their best in a very limited and competitive market. By attending beer festivals, these brewers have found an outlet to expose their products to a wider audience without reinvesting their profits or taking out a loan to finance a visitor-friendly brewery. Some examples of Enterprising Breweries encountered by the author include Brewery “G”, Brewery “H”, Rodham’s Brewery and the Fox and Newt.

5) “*Reclusive*” Breweries

The final category in this typology, but certainly not the least significant, contains breweries belonging to a group that the author has entitled the Reclusive Breweries. These breweries have no involvement with beer tourism whatsoever, and do not take part in beer festivals or offer brewery tours. While one would assume that this entire group is comprised of breweries with negative overall opinions on the usage and importance of tourism for brewers, this is not necessarily the case.

This group comprises brewers who cite a number of rationales for neglecting to employ tourism as a component of their business plan. These reasons include a lack of time and capital, unsafe factory conditions, an individual planning decision and of course, no desire to do so. Surprisingly, a handful of respondents claimed to view tourism as a favourable tool to help brewers; however it was just not a realistic option for them at this point in their company’s history. One respondent notes that they are planning on expanding into beer tourism in the future; however they have yet to have the opportunity to make these changes.

Brewers in this category tend to be small to very small in size. Many are run as sole proprietorships or small partnerships. Brewers such as the Barearts Brewery, the Black Dog Brewery, Bob's Brewing Company and the Oakwell Brewery all fall into the Reclusive Breweries category in this typology. All five categories in this typology are summarised in Table 7.

The “Peddler” – “Promoter” Continuum

Through an analysis of the findings of this study, the author posits a tentative hypothesis based upon the size and success of a brewery and their rationales for taking part in beer tourism practices. This hypothesis states that smaller breweries, or those that do not generate the kind of revenue that larger or more popular breweries do, use tourism for different reasons than do the more successful or well-known brewers.

One can speculate that the smaller or less profitable brewers in Yorkshire use tours and festivals to generate additional revenue through entry fees, merchandise, and product sales, while the more profitable brewers use beer tourism practices more as a marketing tool to further popularize their brands than as a direct revenue generator. Smaller beer producers may be more inclined to supplement their incomes through the use of additional tourism activities such as beer festivals and brewery tours, while any additional marketing exposure or brand recognition that these events provides them with would be incidental and secondary in importance. The author refers to these small pragmatic beer tourism users as “Peddlers”, in recognition of their primary justification for taking part in tours or festivals

This situation may not be the case for the more profitable brewers, who often have names that may be well-known to the keen or even casual beer enthusiast in Great

Britain. The more profitable brewers may take part in brewery tours and festivals in order to further their brand's exposure and thus sell more beer down the line. Any associated sales or entries fees are of secondary importance to the brewery. These brewers that employ beer tourism practices simply as another cog in their marketing machine are dubbed "Promoters".

This hypothesis is consistent with previous literature written on both Scotch Whiskey tourism and wine tourism. For instance, the idea that a distillery, regardless of size or reputation, offers tours of their facilities to improve the consumer – brand relationship is a finding that McBoyle (1996) and Martin (1994) have both discussed. Furthermore, the importance of "cellar-door" sales to small wine producers have been noted by Telfer (2001) and Wargenau and Che (2006).

It must be specified that this conceptualisation works as a continuum with Peddlers on one side and Promoters on another. Every brewery would be placed somewhere along the line between the two poles, either closer to one end or the other. Of course this hypothesis cannot be proven scientifically by the author, as statistics on revenue and brewing capacity were not collected during this particular study. It would perhaps be of interest for a researcher to test this hypothesis in a future study.

Table 7: A Typology of Breweries based upon their Involvement in Beer Tourism Practices

<i>Category Name</i>	<i>Beer Tourism Practices used</i>	<i>Structure of Brewery Tours</i>	<i>Tourism Infrastructure in Place</i>	<i>Opinions on brewers using tourism strategies</i>	<i>Size and Popularity of Brewery in UK</i>
Attraction Breweries	Tours, festivals, facilities for special events	Daily, year-round brewery tours offered to the public. Pre-booked visits also accepted	Visitor's centre, brewery bar, conference facilities, restaurants occasionally	Very positive to positive	Medium sized at the smallest, well-known nationally and sometimes internationally
Participant Breweries	Tours, festivals, some brewers also offer special event facilities	Tours must be pre-booked in advance, and usually in groups	Wide-ranging. Occasional visitor's centre. Usually a brewery tap.	Mixed attitudes and opinions. Range from very positive to negative	May be quite new to the English brewing scene, smaller, or less well-known outside of their local area
Promotional Breweries	Tours, and festivals	Tours available to customers, those in the trade, or CAMRA groups	No generalisable patterns. A Brewery tap is common however	Mixed opinions depending upon the brewer. See tours and festivals as strictly a business tool	A Promotional Brewery can be any size, one such brewery in this study is well-known as a major wholesaler
Enterprising Breweries	Offers tours or attends festivals, but not both	Infrequent tours that are prearranged in groups	Wide ranging from a brewery tap and little else to no facilities whatsoever.	Mixed opinions on the use of tourism by brewers. Some positive, some more negative	Some brewers are "in-flux", expanding or scaling back production Others may be quite new, or limited by a lack of capital or workers
Reclusive Breweries	No tours, festivals, or special event facilities	N/A	None	Mixed. Some Reclusive Breweries are surprisingly positive, while others remain negative or indifferent	Small to very small. Many are run by a sole individual or a two-person partnership in other cases.

The Relevance of Wine Tourism Literature to a Study of Beer Tourism

Introduction

The following chapter investigates the overall appropriateness of employing existing literature on other forms of beverage tourism, in particular wine, to form the basis of a study on the subject of beer tourism. Due to the lack of specific peer-reviewed research written on the topic of beer tourism, the author of this thesis borrowed heavily from the area of wine tourism to set a background for, and to inform the study. Literature on wine tourism or Scotch whisky tourism may be drawn upon by a beer tourism researcher due to the many similarities that exist between them. There were also found to be several major differences between the areas of study, and in many cases findings taken from wine tourism literature were not found to be applicable in this study of beer tourism in Yorkshire, England. These similarities and differences will be discussed below.

Similarities between Beer and Wine Tourism:

Beer and wine are popular drinks enjoyed throughout much of the world. Because of this, both wine and beer may comprise a significant element in an area's culture and lifestyle and may even be seen as a noteworthy component of a regional or national identity. This, of course, will depend on factors such as climate and growing conditions, but, more importantly, on culture, tradition, and regional taste or palate. Hall and Mitchell (2000, p. 446) expanded on this idea to note that "the relationship between cuisine, place, and experience is... increasingly important for tourists..." Much like the great wine producing regions of the world such as Bordeaux, Champagne or the Napa Valley, tourists may associate specific regions or countries with quality beer production. For instance, most casual observers would likely associate the production and consumption of

beer more with Germany, Belgium, Ireland or England than they would with, Turkey, or even major brewing nations in terms of output such as the United States and China.

As a result of popular associations, imageries relating to beer and wine are frequently drawn upon by tourism marketers when attempting to create appealing promotional material aimed at attracting tourists. Bell and Valentine (1997, p.149) stated that “as regions seek to market themselves while simultaneously protecting themselves from the homogenising forces of globalisation, regional identity becomes enshrined in bottles of wine and hunks of cheese”. Wine, beer and other beverages such as whisky, tequila, and even tea may all be drawn upon to further emphasize a region’s distinctive gastronomy or cultural traditions. This process may be successful so long as a connection is forged in the minds of outsiders between the beverage itself and the place enlisting the beverage to help brand and differentiate it from other competing destinations.

From a comparison of the structure of wine tours based upon findings presented during the literature review chapter of this thesis, and the author’s findings on brewery tours in Yorkshire, it appears that both forms of beverage tourism share several key organisational similarities. In a study of South African wine routes, Bruwer (2003) found that ninety-two percent of participating wineries provided visitors with product tastings. Furthermore, eighty-eight percent of responding wineries claimed to offer tourists “cellar-door” sales of their products. Additionally, over fifty percent of responding wineries allowed visitors to take organised tours of their production facilities.

While these statistics may not completely mirror the author’s findings from Yorkshire brewery tours, they are certainly comparable. For instance, it was found that eighty-four percent of Yorkshire brewers provide tastings, while almost fifty-three

percent of breweries sell products or merchandise on-site. Most interestingly, one hundred percent of Yorkshire brewers that allow visitors inside their production facilities enable tourists to take some kind of organised tour of the production areas. It must also be remembered that while Bruwer found that only fifty percent of wineries allowed visitors to tour the production facilities, this specific study on beer tourism differentiates between breweries that allow visitors, and those which do not. Overall, sixty-one percent of Yorkshire's brewers offer tours and a full one-hundred percent of those that offer tours include a visit to the production facilities. Therefore, the differences between the statistics of fifty percent and sixty-one percent are not of major note. From a comparison of these two data sets it appears that winery tours in South Africa and brewery tours in Yorkshire are structured in a rather similar manner, and participation rates amongst brewers and vintners are even quite comparable.

The benefits that a firm may receive by taking part in wine or Scotch whisky tourism appear to be quite similar to the benefits received by breweries. It appears that wineries, distilleries and breweries can receive much from tourists. To illustrate this, Miller (1994) stated that by opening its doors to tourists, a Scotch whisky distillery is primarily concerned with the increased exposure of their brands which ultimately may lead to increased sales, both on-site and 'down the line'. This was found to be the same with Yorkshire's breweries. Both the immediate and future sales opportunities were often-selected responses on the author's mail survey.

While greater consumer awareness of products and an improved brand relationship with customers were the most selected answers by brewers, a significant proportion of respondents claimed that brewery tours also allowed for increased revenues

through entry fees, and increased sales of bottled beer. This increased likelihood of sales at a brewery is not unlike the cellar-door approach mentioned by authors such as Bruwer (2003) and Telfer (2001) who has noted the importance of on-site sales to small wineries in the Niagara wine region of Ontario.

Hall and Mitchell (2000) noted that there is a considerable lack of entrepreneurial skills, marketing ability, product development skills, service standards, and knowledge of consumer behaviour within the Mediterranean wine industry. Because of these deficiencies, the wine tourism industry in the region was thought to be quite underdeveloped with regards to its then current state versus its future potential. This lack of marketing skills and knowledge of consumer behaviour may also be quite high in Yorkshire's brewing industry.

While Britain's beer market is dominated by well-organised, global conglomerates, many small brewers in Yorkshire appear to be, in many cases, casually administered sole proprietorships, or partnerships that lack the capital, resources and in some cases the skills and knowledge to expand into the beer tourism industry. In other cases it was made clear to the author that some small brewers have absolutely no desire to take part in the tourism and hospitality industry, but would much rather concentrate on the brewing of beer, which is after all what brewers do best. Either way, a lack of entrepreneurial endeavour is apparent amongst all but a few of Yorkshire's breweries, and this corroborates with the findings of Hall and Mitchell (2000) and their study of wine tourism in the Mediterranean. Other regions of the wine world may in fact be considerably more developed with regards to their wine tourism products. From personal observation, the author is familiar with the well-developed, highly-organised, and high-

end calendar of weddings, special events, tours, and festivals that comprise wine tourism in Ontario's Niagara region.

Differences between Beer Tourism and Wine Tourism

Of course there are obvious differences between the two forms of beverage tourism that would be apparent to a casual observer. For instance, wine is produced in only some parts of the world due to the fickle climatic conditions in which grapes must grow. Beer, which is produced exclusively indoors in factories (breweries), can be produced anywhere regardless of climate or growing conditions. Even in adverse conditions, grain malt and hops can be imported from elsewhere and brewed with local water to create a 'locally-produced' beer. As a result, the wine tourism product is concentrated in only a number of regions throughout the world, while beer tourism may exist in any region that happens to contain a brewery. Due to this important distinction, wine tourism may be seen by some as a more specialised or unique tourism attribute. It may even be more readily associated with a particular regional identity in some cases, as growing wine grapes and producing wine is a luxury not afforded to all of the world's climatic zones.

From personal observations, it appears that wine tourism is a significantly more developed industry that has become a major business and a source of pride for many wine-producing regions. Wine has traditionally been and still remains associated with hospitality and tourism. In particular, wine has been served alongside food as a natural partner in many of the world's most celebrated culinary traditions. While beer may also pair well with food, this association is not widespread in comparison. After all, very few restaurants devote an entire menu to the beers that they serve, or recommend beer

pairings for accompanying dishes. This food-wine association is considered normative in Western gastronomic traditions, and while bars and pubs with extensive beer lists are gaining popularity, it is unlikely that beer ever replaces wine as the most popular companion to a family dinner or meal out at a restaurant. This attitude may be related to issues of class, tradition and individual tastes but, regardless, the rationales for such decisions are beyond the scope of this study.

Hjalager and Corigliano (2000) noted that the inclusion of food imagery in tourism marketing material has increased considerably over recent decades. They stated that food is often successfully used as an “eye-catcher” in brochures and other visual forms of promotional material. Furthermore, Hall and Mitchell (2000, p.446) outlined the implications that wine tourism may have for the development of a regional identity when they stated that “Wine... is becoming a significant dimension in not only promoting regional image, but also as a focal point of tourist interest”. From the author’s own observations and the specific findings of this study, it appears that beer is used merely as an accessory or “window-dressings” in relation to the overall tourism product being advertised by Yorkshire’s tourism promotional agencies. Yorkshire beer is only one of numerous components drawn upon by tourism marketers to advertise the region to outsiders.

du Rand *et al.* (2003) noted that gastronomy needs to be identified and further applied as a branding technique for destinations. Upon surveying eighty local, regional, and national destination marketing agencies in South Africa, the authors discovered that only fifty-two percent of respondents stated that food or drink was used as a tool for promoting their specific destination. While the majority of Yorkshire promotional

material encountered by the author contained at least a few images and a paragraph or two relating to local food production or gastronomic specialities of the region, beer made up only a small component of the total package being displayed.

Hjalager and Corigliano (2000) noted that Italy has been successful in recent years in using gastronomic tourism initiatives to improve the economic and social growth of some lesser developed areas of the nation. Both private operators like restaurants, hotels and tour organisations, and public bodies who are responsible for tourist infrastructures and rural protection schemes play important parts in the success of gastro-tourism projects. O'Neill and Charters (2000) found that wine tourism has become a strong and growing area of special interest tourism in Australia, and is increasingly being employed as a significant development strategy by regional and rural tourism boards.

In Yorkshire, there exists little to no evidence to suggest that beer tourism is having much of a positive impact on the local or rural economy. This is primarily attributed to the grassroots and informal level on which much of the beer tourism industry is currently being operated. Excluding the three or four medium-sized beer producers who have truly embraced tourism and hospitality, and are actively forging connections with these sectors, the majority of Yorkshire brewers either take part in informal and infrequent forms of beer tourism, or shun the practice altogether.

Yorkshire's beer tourism product can be viewed as underdeveloped, and along with this the linkages and alliances between brewers, hospitality, accommodation providers, and tour operators that exists in the many wine tourism regions is lacking in the region. Telfer (2001) investigated strategic alliances within the Niagara wine region and made note of cooperative behaviour on formal and informal levels, and with regards

to both horizontal and vertical linkages. Concerning horizontal linkages, joint-marketing efforts, festivals, and special events existed between competing wineries in the region.

Wargenau and Che (2006) investigated the creation of a wine route in Southwest Michigan State. Those involved in the wine route employed vertical and horizontal alliances with each other in order to build the region into a competitive destination. The authors noted that wine tourism in the region offers many opportunities for not only the wineries themselves, but also for tour operators, accommodation providers, restaurants, and other hospitality industries (Wargenau and Che 2006).

In the Yorkshire beer tourism industry, cooperative behaviour is often sporadic and inconsequential. There are several beer festivals that take place throughout the counties that comprise Yorkshire; however for the most part these are run by CAMRA and are not organised through direct cooperation between brewers to further market their own products and the beer region itself. A telling statistic is that in Yorkshire, twenty-nine percent of brewers surveyed by the author claim to have no cooperation or alliances whatsoever with other brewers in their region, while thirty-two percent of breweries surveyed claimed to have no cooperation, alliances, or linkages with other businesses in the hospitality or tourism industries. Aside from help and projects by noted beer advocate and consumer rights group the Campaign for Real Ale, and the Society of Independent Brewers, it appears as if many brewers stand alone and neglect cooperative behaviour that may potentially influence the success of the region as a whole and its brewers themselves.

Martin and McBoyle (2006) found that the successful creation and continued preservation of the Scottish Malt Whisky Trail has required that the personal welfare of

varying stakeholders be set aside somewhat and balanced for the mutual benefit of all participants. Furthermore, Hall and Mitchell (2000, p. 453) discussed the role that government may play in a beverage tourism strategy. The authors noted that government is often responsible for the “promotional and coordination functions of national, regional, and local tourist organizations.” Notwithstanding some small business grants and monetary contributions, the author has found no evidence to suggest that there has been any sort of public-private cooperation, or government-led intervention in the Yorkshire beer tourism sector. Perhaps the small size of many of the producers, the undeveloped nature of beer tourism infrastructure, and the apparent niche demand for such products have convinced the public sector that such a venture would return little on their investment.

Getz *et al.* (1999) stipulated that the majority of foreign wine tourists who visit a winery arrive from the countries to which that winery exports their products. This appears logical as a particular brand of wine may develop a following in a foreign country due to the success of their wine as an imported product. If a wine tourist has a favourite brand of wine and they are travelling to the region in which that wine is produced, they may wish to complete a “pilgrimage” of sorts to the vineyards and winery where the wine is produced.

This may not always be the case with Yorkshire brewers however. Most Yorkshire brewers surveyed specify that the local market is the most important for them, and other small producers do not ship their ales very far. Many of Yorkshire’s brewers do not ship their products past the Midlands of England, while a few producers do not even sell their ales outside of their small local area, yet alone export their beers to continental

Europe, North America or Asia, like many European wineries do. Beer consumers in England likely often do not care about where the beer they are drinking is made. A passionate following of Real Ale enthusiasts tend to drink locally, and as was uncovered by the author's investigation into instances of neo-localism in beer branding, many smaller breweries market their products towards local drinkers.

As a result of this, beer drinkers may not feel the need to travel abroad just to enjoy beer, like many tourists may do with wine. However, some may take in a brewery tour or a beer festival if the opportunity is presented to them. This may account for the three competing brewery tours in and around the heavily-touristed city of York in North Yorkshire. Beer tourism on the whole, but particularly in Yorkshire, may not yet be at the stage in its evolution to attract high-end, well-heeled beverage connoisseurs from around the world to a beer-producing region such as is common with wine tourism. For the immediate time being, beer tourism may remain a supplementary activity in a region's tourism repertoire and a minor selling point in tourism promotional material

Figure 16: Ale ferments in traditional Yorkshire Slate Square vats



(Source: Photo taken by the author)

V. CONCLUSIONS

Summary of Findings

The following summary briefly outlines the specific findings of this study based upon their relevance to the five research objectives outlined in the introduction chapter of this paper.

Objective 1) To examine the extent to which local breweries use beer tourism practices.

Through the use of a detailed mail survey that was answered by thirty-one brewers in the region of study, it was found that 61% of respondents offer tours of their production facilities, while 39% do not. The majority of those brewers who claimed to offer tours (68%) allow visitors to attend their facilities at irregular, pre-arranged times. A smaller minority of respondents run daily tours of their production facilities that are open to the public without advanced booking. It was also found that the majority of Yorkshire breweries take part in beer festivals and shows (77%), while only 23% currently do not. All responding brewers were asked the question “There needs to be a greater recognition of the role that tourism can have for breweries” Overall, more than two-thirds (68%) of respondents were found to either “strongly agree” or “agree” with the statement. This would suggest that in general Yorkshire brewers feel quite positively about the potential benefits that tourism may have for beer producers.

Objective 2) To identify the specific beer tourism techniques being used by breweries in Yorkshire, and to evaluate the perceived benefits and limitations that these may offer to brewers.

It was discovered that most brewery tours in Yorkshire are structured in a very similar manner. All responding breweries (100%) claimed to offer a tour of the production facilities used to make their products. Sampling of products and the

introduction of ingredients used in the brewing process are also commonly included in a tour. The majority of responding brewers (84%) claimed to offer visitors a pub in which they may sample their products that is located either on the brewer's premises or nearby.

Yorkshire breweries choose not to offer tours mainly because their operation is too small or because they wish to concentrate solely on brewing. On the contrary 79% of all respondents see greater consumer awareness of brands and products as a benefit that brewery tours provide, while another 68% cite improved brand relationship with consumers as another associated benefit. Brewers note that the hiring of additional staff, increased operating costs and additional capital expenditures are some drawbacks to offering brewery tours. On the whole brewers take part in beer festivals to increase awareness of company brands and products, and to make business contacts with pub owners and operators. A lack of time and few expected benefits are the most often-cited reasons for why brewers choose not to attend beer festivals and shows. While a majority of brewers may take part in beer tourism practices, 65% of respondents were found to have concerns over the ease of turning a working brewery into a facility that can accommodate visitors.

Objective 3) To examine the partnerships, alliances and cooperation that may exist between the brewers themselves, and the tourism and hospitality industries in Yorkshire.

Aside from taking part in local beer festivals and holding membership in a brewing organisation such as the Society of Independent Brewers (SIBA), almost 30% of respondents claimed to have little or no cooperation with other brewers in their area. Furthermore, an even greater number of brewers (32%) claim to have no cooperation, partnerships, or alliances whatsoever with the wider tourism and hospitality industries. Over half of responding brewers claim to make their beers

available at non-affiliated pubs or restaurants that they do not own or operate themselves, while Yorkshire brewers directly own and/or operate pubs and guest houses (45%). This response rate however was lower than the author had anticipated. Regardless, the advanced levels of cooperation and interdependence between brewers in Yorkshire bears little resemblance to the wine producers of Niagara highlighted in the works of Telfer (2001).

Objective 4) To examine if and how tourism stakeholders draw upon beer and brewing to promote and market the region to tourists, and the role that brewers may play in this process.

It can be suggested that due to the increased amount of space that is available to display information on the internet in comparison to a print brochure, there is more room to highlight niche tourism markets such as beer tourism online. Several tourism promotional bodies in Yorkshire display information on local beers in their material; however this is considered of lesser importance than information on attractions and accommodations. Information on beer appears to be employed merely as a component of the greater theme of culinary tourism in the region, and usually shares the spotlight with hunks of cheese, and traditional baked goods

It is not surprising to find that 81% of all responding brewers state that the local market is the most important to their success, and therefore many beers produced in Yorkshire are branded with names and imagery that can be seen as representing a Yorkshire image. A solid majority of the brewers claimed that a Yorkshire image is important to them (65%), while 81% of responding brewers state that they use local place names, historical references or physical characteristics of the local environment in the branding of their beers. While this figure appears quite high, it can be concluded that

while locally branded beers may attract locals to purchase a beer, it has not been demonstrated to relate to increased beer tourism attendance from visitors who live outside the local area. Further research must be conducted to determine if beer branding and the creation of a ‘beer region’ have any impact as a pull factor influencing tourist visits to a region.

Objective 5) To make recommendations for brewery managers and regional marketing boards based upon relevant academic literature and the specific findings of this study.

When considering an expansion into the world of beer tourism, a brewery must be realistic about their revenue, the size and scope of their operations, and the specific goals that they wish to achieve through the use of tourism. While tourism may be beneficial to some of Yorkshire’s brewers in several ways, there are many limitations and additional costs to consider as well. As is evident by the infrequent and informal nature of most of the beer tourism enterprises in the region, the demand for beer tourism is certainly not extensive. Breweries ultimately should aim to produce and sell good beer and not rival historical sites or natural wonders as major tourist draws in their area. With that being said, there are several brewers in the region who rely heavily upon tourist dollars to supplement their overall revenue, and these participants appear to be highly successful.

Major Contributions of this Research

1) The Development of a Beer Tourism Typology

The author has introduced a detailed typology of breweries based upon their relationship and degree of integration with the tourism industry. The author makes note of “Attraction Breweries” which are significant components of the local tourism industry, and finishes with the “Reclusive Breweries” which abstain from any involvement in beer

tourism whatsoever. Furthermore, a tentative hypothesis based upon a brewer's rationale for involvement in tourism and the size and success of that brewery is presented. This hypothesis must be empirically tested in future research to determine its acceptability. The "Peddler-Promoter" hypothesis states that a smaller or less successful brewer will get involved in beer tourism mainly as a means of generating additional revenue through entry fees and on-site sales, while a larger or more successful brewer will get involved in beer tourism primarily for the marketing, brand relationship, and promotional opportunities it provides.

2) A Comparison with Wine Tourism

The author presented a detailed review of the relevance of wine tourism literature for the field of beer tourism. It was found that although the two forms of beverage tourism share many commonalities, there exist as many differences. Most notably, the highly-developed and 'up-market' business practices associated with wine tourism developments may have little to do with the grass-roots, casual, and more middle and working class world of beer tourism. This comparison ultimately emphasises the importance of developing a specific beer tourism literature.

3) The Contribution of Rare Research on Beer Tourism on which others can build.

It is hoped that the findings of this beer-specific research may be used by others with a keen interest in beer and tourism to undertake additional studies in the field. Beer tourism may be seen as occupying an early stage in its development, and it is hoped that others can build upon the findings of this study to present further information that will benefit both producers and consumers of beer.

Final Thoughts and Considerations

Further Research:

This study solely investigates the links between beer producers and the tourism and hospitality industry in Yorkshire, England. The specific activities that make up the supply of beer tourism practices is of particular importance to the author, as are the links that exist between brewers and other businesses in the tourism and hospitality industries. Also investigated in this thesis is beer branding, and the role that beer plays in tourism marketing materials. However, the author of this study does not look into issues of demand and consumer attitudes and opinions on the subject of beer tourism. A study that profiles the beer tourist, their user characteristics, willingness to travel and several other importance considerations would be of great value to any brewer who is considering taking part in a beer tourism venture.

Furthermore, the findings of this study can only be applied to the area in which the research took place. It would be of great benefit to test the findings of this study against findings taken from alternative locations in the United Kingdom, Europe and elsewhere in the beer-producing world. For instance, a comparison of the German or Belgian and the English beer tourism industry would make for a very interesting study.

With regards to the inclusion of beer information and imagery in tourism marketing material, further research must be conducted to determine if beer branding and the creation of a 'beer region' have any impact as a pull factor influencing tourist visits to a region. Such a study would again focus upon demand-side findings relating to the preferences of potential beer tourists, and the perceived attractiveness of a region as a tourism destination.

Furthermore, additional studies on beer and tourism should take the size, brewing

output capacity, and possibly the revenue of a brewery into account in order to investigate potential differences between breweries' tourism strategies based upon their size and success in their market. With additional information on output and revenue gathered, the author's "Peddler-Promoter" hypothesis could also be tested empirically.

The Importance of Beer Tourism Specific Academic Literature:

While a considerable amount of literature borrowed from the area of wine tourism may be useful to a study of beer tourism, the greater quantity of this research is of lesser significance and relevance. The wine tourism sector in much of the wine-producing world is considerably better developed, organised and lucrative when compared to the grass-roots and often informal nature of beer tourism.

Many larger or globally well-known brewers such as Guinness and Heineken have created impressive visitors' centres and brewing museums which attract considerable tourist attention but on the whole the average user of beer tourism appears to be the small to medium-sized brewers who make infrequent forays into the tourism world. As a result of the differences that exist between the structure and magnitude of wine tourism when compared to beer tourism, the author must advocate the continual expansion of beer tourism-specific literature that presents findings that are solely directed at beer tourism practices in various regions of study throughout the world.

Of course it must be made clear that the author's study solely expands upon the supply of beer-tourism literature written in the English language. At no time during this study did the author draw upon research conducted in languages other than English, and this may have limited the amount of beer tourism literature that was available to form the basis of this study.

The Role of this thesis

It is hoped that this thesis may help to form a solid foundation on which the understudied area of the beer tourism may be further explored. Niche magazines such as *Beers of the World* are aimed at a small component of interested beer connoisseurs, and often present regional profiles that link beer, tourism, and travel together. These local guides however, are presented for the exclusive benefit of the reader and do not take the producers' interests into account. With additional studies that build upon the findings of this thesis, it is hoped that a clear picture of both the supply and demand sides of beer tourism will become available. This will allow beer producers (as well as other small producers in unrelated fields) to make an informed decision about the potential benefits, drawbacks and opportunities that may exist by employing tourism strategies as an extension of their primary business activities.

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Appendix 1:

Dear Researcher:

The recommended revisions/additional information requested in the initial ethics review of your ORE application:

Title: Beer, Tourism, and Regional Identity

ORE #: 14071

Collaborator: Dr. Geoffrey McBoyle (gmboyle@fes.uwaterloo.ca)

Faculty Supervisor: Dr. Geoffrey Wall (gwall@fes.uwaterloo.ca)

Student Investigator: Jeremy Niester (jniester@fes.uwaterloo.ca)

have been reviewed and are considered acceptable. As a result, your application now has received full ethics clearance. However, further revisions and/or additional information are required as outlined below.

A signed copy of the Notification of Full Ethics Clearance will be sent to the Principal Investigator or Faculty Supervisor in the case of student research.

ADDITIONAL REVISIONS OR ADDITIONAL INFORMATION:

- i. Interview Information letter, 3rd para, 1st line -- should be "All paper notes and recordings gathered..."

- ii. Please provide the ORE with the revised feedback letter.

Revised materials should be provided within ten days to the Research Ethics Coordinator in the Office of Research in hard copy or by email to ohrac@admmail.uwaterloo.ca .

Note 1: This clearance is valid for four years from the date shown on the certificate and a new application must be submitted for on-going projects continuing beyond four years.

Note 2: This project must be conducted according to the application description and revised materials for which ethics clearance have been granted. All subsequent modifications to the protocol must receive prior ethics clearance through our office and must not begin until notification has been received.

Note 3: Researchers must submit a Progress Report on Continuing Human Research Projects (ORE Form 105) annually for all ongoing research projects. In addition, researchers must submit a Form 105 at the conclusion of the project if it continues for less than a year.

Note 4: Any events related to the procedures used that adversely affect participants must be reported immediately to the ORE using ORE Form 106-----

Susanne Santi, M. Math.,

Manager

Office of Research Ethics

NH 1027

519.888.4567 x 37163

**Appendix 2:
INTERVIEW CONSENT FORM**

I have been informed about a study on Beer, Tourism, and Regional Identity being conducted by Jeremy Niester of the Department of Tourism Policy and Planning at the University of Waterloo in Ontario, Canada.

I am aware that I have the option of allowing my interview to be tape recorded to ensure an accurate recording of my responses.

I am also aware that excerpts from the interview may be included in the thesis and/or publications to come from this research, with the understanding that the quotations will be anonymous if I so wish.

I was informed that I may withdraw my consent at any time without penalty by advising the researcher.

This project has been reviewed by, and received ethics clearance through, the Office of Research Ethics at the University of Waterloo. I was informed that if I have any comments or concerns resulting from my participation in this study, I may contact the Director, Office of Research Ethics at 1-519-888-4567 ext. 36005.

With full knowledge of all foregoing, I agree, of my own free will, to participate in this study.

YES NO

I agree to have my interview audio recorded.

YES NO

I agree to the use of anonymous quotations in the thesis or any publications

YES NO

I agree to my company being named and anonymity for me in the thesis and or any publications

YES NO

Participant's Name and Organization:

_____ (Please print)

Participant Signature:

Witness Name

Witness Signature

Date: _____

Appendix 3:

Open-Ended Interview Themes.

To Brewery representatives at a Beer Festival or on a brewery tour

What do you hope to accomplish by taking part in this festival?

How important are festivals like this to your overall business strategy?

Do you run tours of your brewery?

Why? Why not?

What are the benefits of tours in your opinion?

Limitations/ reasons why you don't

What kind of tours do you provide? (structure, regularity)?

How important is beer to Yorkshire's image domestically?

Names of beers. Are they specific to the region? Do they say anything about Yorkshire or your specific part of Yorkshire?

Do you feel that this is significant/important?

How important are names for you?

"There needs to be greater recognition of the role that tourism can have for breweries" agree? Disagree with this statement?

Do you feel that your brewery is a part of the tourism industry in Yorkshire?

Why? Why not?

Have you ever worked or considered working collaboratively with other brewers in the region to attract more tourists to your breweries? Joint marketing, organised ale trails,

Have you ever worked or considered working collaboratively with other brewers in the region to increase your overall amount of business??

Is your brewery affiliated with any pubs?

what kind of tie?

Do you feel that pubs are an important component of Britain's tourist image internationally?

Appendix 4:



Tourism Policy and Planning

Dear _____

I would like to thank you for your participation in this study on beer, tourism, and regional identity. Please remember that any data pertaining to yourself as an individual participant or to the business that you represent will be kept confidential unless of course you have agreed to be named directly in this study. If you are interested in receiving more information regarding the results of this study, or if you have any questions or concerns, please contact me at either the phone number or email address listed at the bottom of the page. When the study is completed, I will send it to you if you wish. The study is expected to be completed by late February or March, 2008.

As with all University of Waterloo projects involving human participants, this project was reviewed by, and received ethics clearance through, the Office of Research Ethics at the University of Waterloo. Should you have any comments or concerns resulting from your participation in this study, please contact Dr. Susan Sykes in the Office of Research Ethics at 1-519-888-4567, Ext., 36005.

Thank you once again
Sincerely,

Jeremy Niester
University of Waterloo, Tourism Policy and Planning M.A.E.S Candidate.
1-416-485-4927
jniester@fes.uwaterloo.ca

Appendix 5:



Tourism Policy and Planning

Dear _____

I am a student in the Department of Tourism Policy and Planning at the University of Waterloo in Ontario, Canada. I am conducting my Master's thesis research on beer, tourism, and regional identity under the supervision of Professor Geoff Wall. As a tourism student and a fan of real ale, I am interested in investigating the relationship that may exist between the brewing industry and the hospitality and tourism sectors in Yorkshire. Through my research I hope to investigate the potential for, and extent to which breweries participate in tours of their production facilities, and take part in beer festivals. Furthermore, this study is interested in determining if, and how Yorkshire's rich brewing history and international reputation can be marketed to attract both domestic and international tourists to the region.

Your experience and understanding of Yorkshire's brewing industry is sought in this study. I would appreciate if you could take the time to complete the enclosed survey. The survey consists mainly of multiple choice style questions. Completion of the survey is expected to take roughly five to ten minutes of your time. You may of course omit any questions you prefer not to answer. There are no known or anticipated risks to participation in this study. Participation in this project is voluntary. Your company's name will not be used in this study unless you provide permission for me to do so. Further, all information you provide will be considered confidential. The data collected will be held under lock and key in a safe location for one year and then shredded. Electronic data will be held indefinitely on a password-protected computer. Please note that your contact information was taken from the 2007 Campaign for Real Ale Good Beer Guide.

If you are interested in participating in this study, please return the completed questionnaire in the pre-posted and pre-addressed envelope provided at your earliest convenience or by September 31st, 2007 at the latest. If you would like additional information to assist you in reaching a decision about participation, please feel free to contact Professor Geoff Wall at gwall@fes.uwaterloo.ca or myself at jniester@fes.uwaterloo.ca. I would like to assure you that this study has been reviewed and received ethics clearance through the Office of Research Ethics at the University of Waterloo. However, the final decision about participation is yours. Should you have any comments or concerns resulting from your participation in this study, please contact Dr. Susan Sykes in the Office of Research Ethics at 001-519-888-4567 Ext. 36005.

Thank you for your consideration.

Yours sincerely,
Jeremy Niester

Appendix 6:

Name of Brewing Company: _____

Location: _____

1) Do you offer tours of your brewery? (Select one)

Yes (Please skip questions 2 & 3)

No (Please skip questions 4 to 8)

2) If tours of your brewing facilities are not currently offered could you please specify why this is the case? (Select all that apply)

No desire to do so

Operation too small

Added expense

Concentration solely on brewing

Too new a company

Lack of time

Hiring of additional staff

Remote location

Other (Please Specify) _____

3) If you are not currently offering public tours of your brewery do you plan on doing so in the future?

Yes

Know

Don't Know

4) Could you please describe the regularity of the brewery tours that you currently offer? (Select all that may apply)

Regular public tours available year round without advanced booking

Regular public tours available year round with advanced booking

Public tours available without advanced booking in peak seasons only

Public tours available with advanced booking in peak seasons only

Group tours available through advanced booking only

Other (Please Specify) _____

5) Does your brewery offer any of the following facilities that may be used by visitors? (Select all that may apply)

- Restaurant/Café
- Visitor's Pub or brewery tap
- Gift Shop
- Brewery museum
- Visitor's Centre
- Conference facilities
- Other (Please Specify) _____

6) What does a tour of your brewery include? (Select all that may apply)

- Tour of production facilities
- Tutorial on how products are made
- Samples of products
- Company history/ Corporate information
- Tutored tastings
- Introduction to ingredients used in brewing procedure
- Opportunity to buy beers and company merchandise
- Cooperage demonstration
- Other (Please Specify) _____

7) What benefits do you feel your company receives from operating tours of your brewery? (Select all that may apply)

- Increased on-site sales of bottled beer and merchandise
- Greater consumer awareness of brands and products
- Improved brand relationship with consumers
- Additional revenue from entry fees
- Additional revenue from sales of food and drink
- None
- Other (Please Specify) _____

8) What may be some of the potential drawbacks of offering tours of your brewery? (Select all that may apply)

- Additional capital expenditures in building visitor facilities
- Increased operating costs
- Additional staff
- Lesser focus on beer production
- None
- Other (Please Specify) _____

9) Does your brewery take part in beer festivals or beer industry shows?

- Yes (Please skip question 12)
- No (Please skip to question 12)

10) Approximately how many beer festivals/shows does your brewery take part in during a given calendar year?

- 1 to 5
- 6 to 10
- 11- 20
- 20 or more

11) Why does your brewing company choose to take part in beer festivals and shows? (Select all that may apply)

- Increase awareness of company's brands and products
- To win awards and accolades
- To sell products and merchandise
- To make business contacts with pub owners/operators
- To represent the region on a national or global level
- Other (Please Specify) _____

12) Why does your brewing company choose not to take part in beer festivals and shows? (Select all that may apply)

- Additional costs
- Lack of time
- Few expected benefits
- Lack of staff
- No Interest
- Other (Please Specify) _____

Please indicate to what extent you agree or disagree with the following 3 statements.

13) "There needs to be a greater recognition of the role that tourism can have for breweries"

- Strongly agree
- Agree
- Don't know
- Disagree
- Strongly disagree

14) "Turning a working brewery into a tourist attraction may be a daunting or unrealistic task for those who are primarily concerned with making good beer on a small-scale or regional level"

- Strongly agree
- Agree
- Don't know
- Disagree
- Strongly disagree

15) "Yorkshire's brewing industry is world renowned and should be highlighted in tourism marketing material in order to attract more tourists to the region"

- Strongly agree
- Agree
- Don't know
- Disagree
- Strongly disagree

16) To what extent does your brewing company work collaboratively with other brewers in the region? (Please select all that may apply)

- Little or no cooperation
- Sharing of production facilities or equipment
- Joint promotion/marketing
- Word of mouth advertising
- Cooperation in the form of an ale trail or beer trail
- Participation in local beer festivals or events
- Membership in a brewing organisations (such as the IFBB or SIBA)
- Other (Please Specify) _____

17) To what extent does your brewing company currently work collaboratively with businesses in the hospitality and tourism sector of the economy? (Please select all that apply)

- No cooperation, partnerships, or alliances what so ever
- Direct ownership/operation of pub(s)
- Direct ownership/operation of guest house or hotel
- Beers available at non-affiliated pub(s) as a guest beer
- Referrals to local accommodation providers or restaurants
- Connections with local tour operators
- Providing facilities for special events
- Relationship with local tourism office or promotional board
- Other (Please Specify) _____

18) Does your brewing company use local, historical, place names, or physical characteristics of the local environment in your branding and naming of your products?

Yes

Please explain briefly

No

19) As a Yorkshire brewery do you feel that creating a brand image which may be viewed by consumers as “distinctly Yorkshire” is important?

Yes

Please explain

No

Why not?

20) What are your brewing company’s goals for the future?

Short term:

Long term:

21) Do you advertise your beers or tours of your brewery in any regional tourism guides, magazines, pamphlets or publications?

Yes

Please explain briefly

No

22) Which markets do you feel are the most important for your brewery? (Select all that may apply)

Local market. Your county in Yorkshire

Regional market. The North of England

The UK as a whole

International

Thank you very much for taking part in this study.

Appendix 7:

I have been informed about a study on Beer, Tourism, and Regional Identity being conducted by Jeremy Niester of the Department of Tourism Policy and Planning at the University of Waterloo in Ontario, Canada.

I am aware that information from this survey may be included in the thesis and/or publications to come from this research, with the understanding that all quotations will be anonymous.

I was informed that I may withdraw my consent at any time by advising the researcher.

This project has been reviewed by, and received ethics clearance through, the Office of Research Ethics at the University of Waterloo. I was informed that if I have any comments or concerns resulting from my participation in this study, I may contact the Director, Office of Research Ethics at 001-519-888-4567 ext. 36005.

With full knowledge of all foregoing, I agree, of my own free will, to participate in this study.

YES NO

I agree to the use of anonymous quotations in the thesis or any publications

YES NO

I agree to my company being named and anonymity for me in the thesis and or any publications. Please remember that your name will not be listed in this study.

YES NO

Participant's Name

_____ (Please print)

Participant Signature:

Date: _____

If you would like to receive a copy of the completed paper or if you would like to make yourself available for follow-up questions via email could you please provide me with a working email address.

Appendix 8:

(See maps for approximate locations in the area study)

- 1) Abbey Bells Brewery, North Yorkshire
- 2) Abbeydale Brewery, South Yorkshire *
- 3) Acorn Brewery, South Yorkshire
- 4) Barearts Brewery, West Yorkshire *
- 5) Black Dog Brewery, North Yorkshire *
- 6) Black Sheep Brewery, North Yorkshire *
- 7) Bob's Brewery, West Yorkshire *
- 8) Bradfield, South Yorkshire
- 9) Briscoe's Brewery, West Yorkshire
- 10) Brown Cow Brewery, North Yorkshire
- 11) Captain Cook Brewery, North Yorkshire *
- 12) HB Clark & Co., West Yorkshire *
- 13) Concertina Brewery, South Yorkshire
- 14) Copper Dragon Brewery, North Yorkshire
- 15) Cropton Brewery, North Yorkshire
- 16) Crown and Wellington Brewery, South Yorkshire
- 17) Daleside Brewery, North Yorkshire
- 18) E&S Elland Fine Ales, West Yorkshire *
- 19) Eastwood the Brewer, West Yorkshire
- 20) Empire Brewing, West Yorkshire *
- 21) Fernandes Brewery, West Yorkshire
- 22) Frog and Parrot Brewhouse, South Yorkshire
- 23) Garton Brewery, East Yorkshire
- 24) Glentworth Brewery, South Yorkshire *
- 25) Golcar Brewery, West Yorkshire *
- 26) Goodmanham Brewery, East Yorkshire
- 27) Greenwood Brewing Co., West Yorkshire
- 28) Halifax Steam Brewing Co., West Yorkshire
- 29) Hambleton Ales, North Yorkshire *
- 30) Holme Valley Ales, West Yorkshire
- 31) Kelham Island Brewery, South Yorkshire *
- 32) Linfit Brewery, West Yorkshire
- 33) Litton Ale Brewery, North Yorkshire
- 34) Malton Brewery, North Yorkshire
- 35) Marston Moor Brewery, North Yorkshire *
- 36) Naylor's Brewery, West Yorkshire
- 37) North Yorkshire Brewing Co., North Yorkshire
- 38) Oakwell Brewery, South Yorkshire *
- 39) Old Bear Brewery, West Yorkshire *
- 40) Old Mill Brewery, East Yorkshire *
- 41) Old Spot Brewery, West Yorkshire
- 42) Ossett Brewing Co., West Yorkshire *

- 43) Port Mahon Brewery, South Yorkshire
- 44) Riverhead Brewery, West Yorkshire
- 45) Rodham's Brewery, West Yorkshire *
- 46) Rooster's Brewing Co., North Yorkshire
- 47) Rudgate Brewery, North Yorkshire
- 48) Ryburn Brewery, West Yorkshire
- 49) Salamander Brewing Co., West Yorkshire
- 50) Saltaire Brewery, West Yorkshire *
- 51) Selby Brewery, North Yorkshire *
- 52) Sidecar Brewery, West Yorkshire
- 53) Samuel Smith Old Brewery, North Yorkshire *
- 54) Timothy Taylor & Co., West Yorkshire
- 55) T&R Theakston, North Yorkshire *
- 56) Tigertops Brewery, West Yorkshire
- 57) Turkey Brewery, West Yorkshire
- 58) Wensleydale Brewery, North Yorkshire *
- 59) Wentworth Brewery, South Yorkshire *
- 60) WF6 Brewing Co., West Yorkshire
- 61) Whalebone Brewery, East Yorkshire *
- 62) Wharfdale Brewery, North Yorkshire *
- 63) Wold Top Brewery, East Yorkshire
- 64) York Brewery, North Yorkshire *
- 65) Yorkshire Dales Brewing Co., North Yorkshire *
- 66) Fox and Newt Brewery, West Yorkshire *
- 67) Sheffield Brewery, South Yorkshire
- 68) Carlsberg Brewing UK, West Yorkshire +
- 69) John Smith's Brewery, North Yorkshire
- 70) Anglo-Dutch Brewery, West Yorkshire *

* indicates a brewery that agreed to take part in the research

+ indicates a brewery that was intentionally left out of the sample

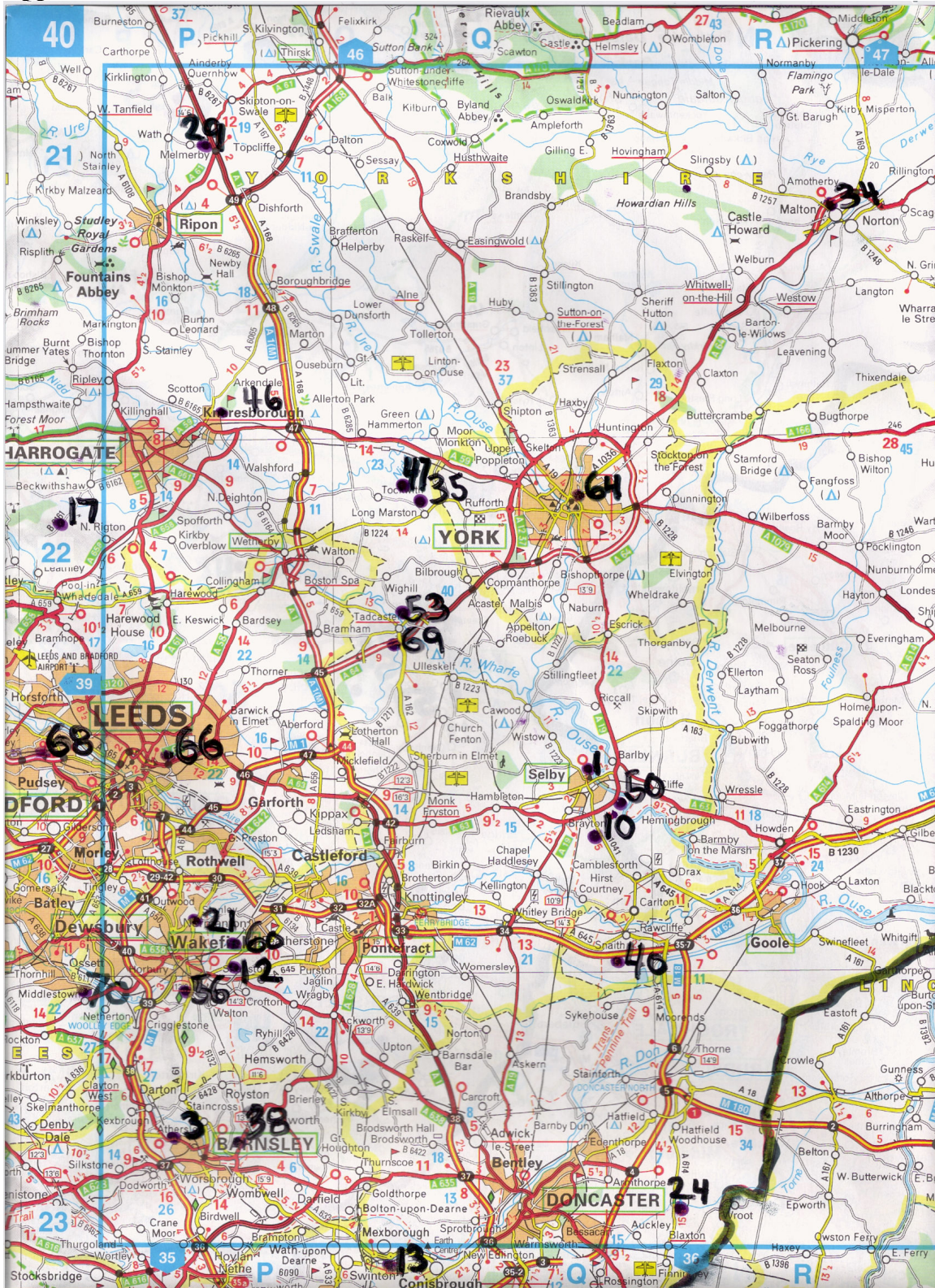
Appendix 9: Breweries in South-West Yorkshire



Scale: 1:300 000 – 1 Cm = 3 KM.

Source: Michelin Great Britain and Ireland Tourist and Motoring Atlas 2007

Appendix 11: Breweries in Western and Central Yorkshire



Scale: 1:300 000 – 1 Cm = 3 KM.

Source: Michelin Great Britain and Ireland Tourist and Motoring Atlas 2007

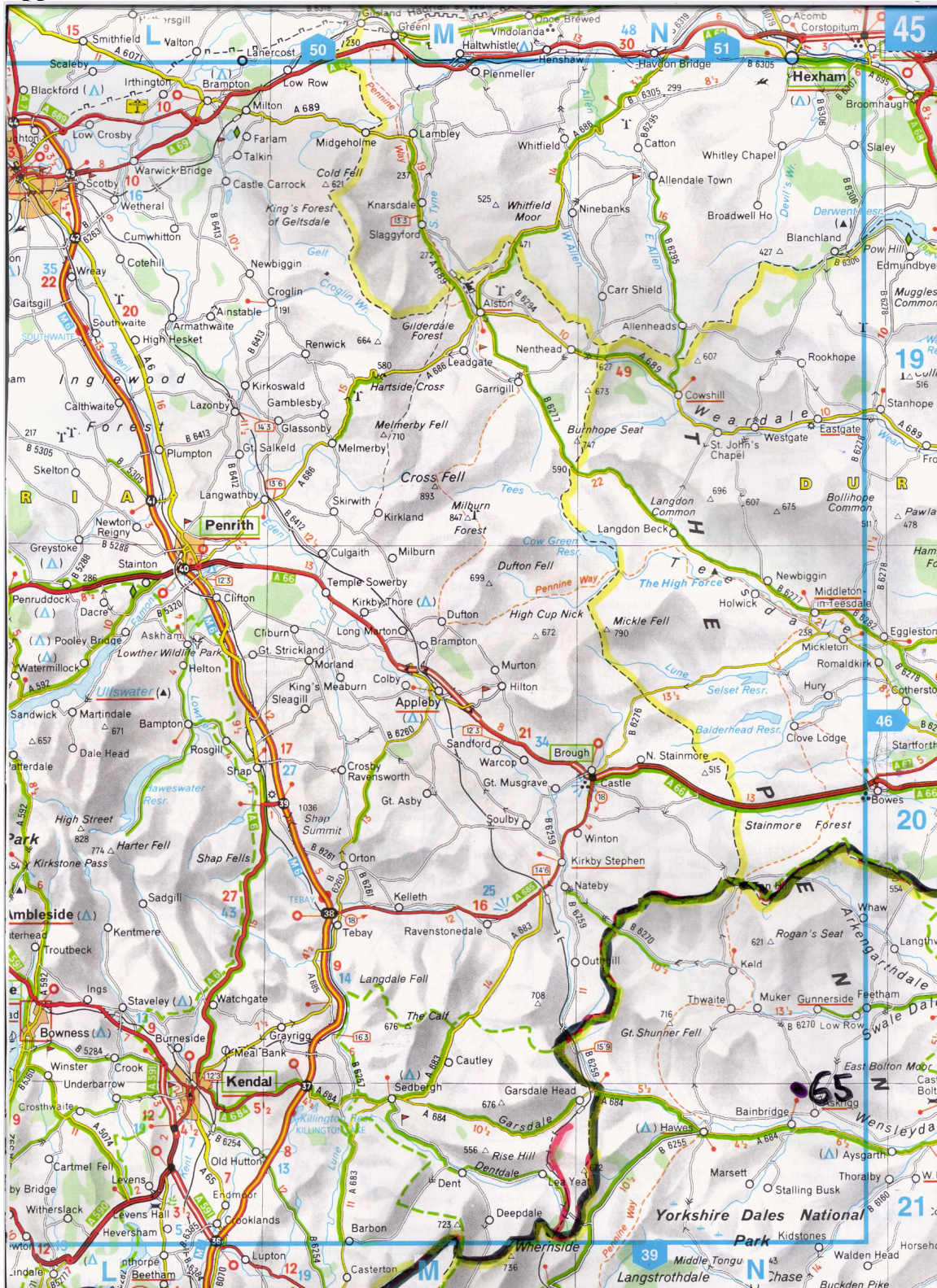
Appendix 12: Breweries in the East Riding of Yorkshire



Scale: 1:300 000 – 1 Cm = 3 KM.

Source: Michelin Great Britain and Ireland Tourist and Motoring Atlas 2007

Appendix 13: Breweries in the North-West corner of Yorkshire



Scale: 1:300 000 – 1 Cm = 3 KM.

Source: Michelin Great Britain and Ireland Tourist and Motoring Atlas 2007

Appendix 14: Breweries in North-Central Yorkshire



Scale: 1:300 000 – 1 Cm = 3 KM.

Source: Michelin Great Britain and Ireland Tourist and Motoring Atlas 2007

