



Uncovering factors influencing consumers' interest for craft beer: A study on microbreweries in Bangalore, India

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Abstract

The rapid emergence of demand for premium craft beer owing to changing cultural attitudes of young and affluent population contributed to the positive growth outlook for beer market in India. Bangalore, a cosmopolitan and progressive city, now considered as a favorite destination for Indians and expatriates has earned itself the title of "The Pub capital of India". Being recognized as a "tech hub with a taste for fun" the city has been greatly affected by the western phenomenon of craft beer renaissance. Hence, with an objective to understand the factors that influence brand loyalty towards microbreweries was considered suitable to partake in this research study. The attributes such as brand image, purchase criteria, product attribute, brewery attribute, and customer satisfaction was considered to test brand loyalty of commercial craft beer consumers. Based on the data collected from 358 consumers visiting microbreweries, the regression analysis indicated that brand image and purchase criteria have a significant relationship with brand loyalty. Additionally respondents provided novel suggestions that can help businesspersons in the craft beer division to appreciate the consumption style to meet the preferences and desires of customers. These outcomes are significant to understand the consumers' actions in the craft beer market to produce and market the best possible and widely accepted product in an ever emerging micro-brewing sector in India.

Keywords: Craft beer, micro-brewery, brand loyalty, Bangalore, India.

Introduction and overview of study dimensions

India now has a comparatively younger population and increasing levels of income and it is not surprising that there is now an increase in the reception of beer as a favoured lifestyle beverage. Growth in the craft beer sector has also been boosted by the growing social acceptability of what is mild alcohol consumption amongst the younger generation. The "young urban-dwellers who are gaining an appetite for beer compared to liquor... Brewpubs are attracting Indians away from industrial bottled beers. High end hotels and restaurants are keen to bring craft beer into their product portfolio. These establishments are keen to bring "The Beer on Tap" concept back to serve their customers different styles of international quality delicious craft brews" (KenResearch, 2019). Consequently, the beer market in India is projected to grow at a CAGR above 7.6% during



2018-2024 (Research and Markets, 2018). According to Business Monitor International (BMI), the rapid emergence of demand for premium and craft beers owing to changing cultural attitudes of young and affluent population is a major contributor to the positive growth outlook of beer market in India (Research and Markets, 2018). Alongside, the culture of pubs and night clubs, craft beer businesses are gaining momentum and are mostly found in metro cities such as Mumbai, Delhi, Bangalore and Kolkata, followed closely by smaller tier two cities.

Until lately, Indians were just introduced to the commercial lager and it is only now, that a bottle of beer is chilled in the refrigerator before consumption. The craft beer wave truly began in India nine years ago with Indian microbreweries making and serving fresh beer on-site in what is popularly termed “brewpubs” (Achant, 2018). Bangalore has earned itself the title of being known as “The Pub capital of India”, “Party-hub of India” and the like – in most social feeds across the internet (Balram, 2018; The South Indian Post, 2018). Being recognized as a “tech hub with a taste for fun” as well as a cosmopolitan and progressive city, now considered as a favorite destination for Indians and expatriates (Chitty, 2018) has been greatly affected by the western phenomenon of craft beer renaissance (Fastigi, Esposti, Orazi & Viganò, 2015). According to Excise department data, as against 269 pubs in 2014, the city now has 406 pubs with almost a fifty percent surge in last four years.

“Craft brewing” is a comprehensive term for progresses in the brewing industry subsequent to the micro brewing movement of the late 20th century (Oliver, 2011). The definition is not wholly unswerving, but it normally applies to moderately small, independently-owned commercial breweries that operate upon traditional brewing methods that focus on flavor and quality. However, an independently owned brewery that produces small amounts of beer can be broadly understood as a “microbrewery. These breweries largely focus more on quality, taste, flavors, and brewing techniques (Boteler, 2009; Oliver, 2011). According to some of the widely established definitions of microbreweries however take account of the quantity since it limits the production of less than fifteen thousand barrels of beer and trades more than 75% of its production.

In the U.S. and the UK, where beer sales are in global decline, there is a vigorous upturn in beer sales belonging to the co-called craft or micro-brewing sector (Cabras & Higgins, 2016). It is important to examine the motivations of craft beer drinkers while recognizing the steady growth for the beer market. A study on Brazilian craft beer sub-culture of consumption by Koch and Sauerbronn (2018) discusses the feelings of craft beer consumers to show their loyalty and commitment. The authors differentiated members of the craft beer subculture of consumption according to their beer-specific knowledge, commitment to subculture ethos, emotional attachment to craft beer, and experience of drinking and making beer. A study on the analysis of motivations, willingness of pay, and repeat patronage intentions of U.S. craft beer drinkers by Taylor Jr. and DiPietro (2017) reveals two segments of drinkers with significant difference in motivations to visit a microbrewery taprooms and their willingness to pay premium for craft beer.

Consumers are categorized into five groups based on their brand loyalty. This is portrayed in the brand loyalty pyramid (Gurau, 2012). The first level includes the people/ buyers who are non-loyal and switch brands easily. The second includes people who are either satisfied or not dissatisfied enough to stimulate a change in them. However, they are vulnerable to competitors’ efforts. The third level consists of satisfied customers who have a switching cost. Competition must ensure that their benefits compensate for the switching costs associated. The “Likes” have an emotional attachment to the brand and this is probably the reason due to which they are already in a long term relationship with the brand (Ahmed, Lodhi & Ahmed, 2015; Ahmed & Thyagaraj, 2015; Jana



& Chandra, 2016). The top of the pyramid showcases the best possible customers who are committed to the brand and never change brands or switch temporarily. Everything from proximity, value, taste, flavor, price, ambience and service influence the re-purchase intentions of customers, especially in the F&B industry (Shetty, Bhandary, Chandra & Shetty, 2018). Brand switching is a major threat to any business, whether it is old or new. Andrew Ehrenberg (London Business School) mentions that consumers acquire “portfolios of brands”. They shift between these brands regularly since they demand a sort of “change”. Every action from a competitor is aimed at decreasing your consumers’ brand loyalty.

There have been no studies piloted with relation to factors that impact brand loyalty of consumers towards microbreweries anywhere in India. Given the experimental attitude of today’s young adults, the importance of determining the factors that affect brand loyalty cannot be understated. Bangalore, with its given demographics and microbreweries, was considered as the best location to conduct this study by the researchers. Hence, this research aims to provide an insight into the various factors that affect brand loyalty towards microbreweries in Bangalore. Price is normally considered, by default, as the primary factor influencing repeat business. Often, the difference lies within the perception of “price” against “value for money”.

The study focuses on answering questions regarding combinations of different factors that can be altered by microbreweries to increase customer base. It is expected that, this research would turn out favorable to microbreweries that aim to upsurge consumer base and repeat business by ensuring brand loyalty to the maximum possible limit. It aims to provide a combination of limited attributes that the current as well as new microbreweries can adopt into their action plan, so as to direct and influence brand loyalty of their customers towards themselves. It would offer an insight into brand loyalty to academics and vendors involved with marketing research initiatives.

Literature Review

Micro-Breweries and Brand Loyalty

Kleban and Nickerson (2012) envisage craft beer as the driver of the “taste revolution”. Currently customer preferences about beer seem to be associated with the innovation of fresh flavors, the exploration of quality as well as product craftsmanship and these aspects are progressively altering customers’ actions and buying behavior, triggering them to favor off-trade consumption rather than spaces conventionally linked to earlier consumption practices such as restaurants, brewpubs etc. (Aquilani, Laureti, Poponi & Secondi, 2014). Craft breweries or microbreweries focus on differentiation by producing beer locally, via both traditional and non-traditional ingredients to create innovative new flavors (Kleban & Nickerson, 2012; Reid et al., 2014). According to a study on customers’ habits, preferences, habits, and perceived quality by Aquilani, et al. (2015), roughly 69% of the beer consumers considered craft beer to be of superior quality as compared to commercial beer. According to the authors, a number product attributes that include carbonation, foam, flavor, and color contributes to the superiority in quality of craft beer over commercial beer. Concerning taste, Sester et al. (2013) indicated that “consumers assume to find flavors, such as texture characteristics, bitterness, sparkles and other physiological qualities like thirst-quenching contribute to its popularity off late. A study by Ascher (2012) associates the relation between higher prices with better quality and status, whereas lower prices indicate mass-produced drinks and are more affordable.

Price changes don’t affect beer purchase, but they are relevant in shaping switching behaviors among local beers (Lopez & Matschke, 2012). At the same time, loyal clients are less likely to



change their supplier of the service/product and since they are more tolerant to an increase in price (Wettstein, Brosig, Glauben, Hanf & Loy, 2009). An Italian study on patterns of consumers' interest for craft beer by Donadini and Porretta (2016) revealed the importance of eight attributes (brewing technology, type of brewery, brew house equipment, raw material characteristics, type of container, retail price, where to buy, and location of the) and their variation at different levels. However, the authors pointed out that Italian consumers placed utmost importance on type of container and on brewing technology.

Brands exist in the cognizance of consumers, and consequently a brand is only as strong or real as it is perceived by the consumer (Jones, 2017). Brand loyalty describes the acquisition of brand loyal consumers as well as it is the heart of any brand's value, as once achieved, the loyalty from consumers can be persistent (Aaker, 2014). Certain literature denotes the term "loyalty" as resulting from one or two measures; while few authors consider loyalty as a multi-dimensional relationship construct that progresses over time (Mishra, 2017). According to Jain (2017), there are six factors that impact brand loyalty, which are brand image, trust, commitment, satisfaction, importance of relationship, and word-of-mouth recommendations. Alongside, literature revealed the role of brand relationship dimensions in the development of brand community which is a modern concept of marketing domain (Pawar & Raut, 2019). Within the craft beer industry, various branding strategies, together with brand associations, are critically important in generating a brand image for a sustained consumer base (Kleban & Nickerson, 2012).

A study on factors influencing brand loyalty to craft breweries in North Carolina by Murray and Kline (2015) revealed three factors viz. connection with the community, satisfaction, and desire for unique consumer products as the most influential factors. According to Kim and Chintagunta (2012) Stimulus from social groups and consumption environments/contexts are very important with a focus on intrinsic brand preferences. Hence it is evident that brand loyalty is fabricated over time through several factors, together with positive experiences of the particular brand as an ongoing consumer-brand relationship.

In conclusion, the success of craft beer is owing to numerous factors discussed above along with hyper-differentiation prospects and properties (Clemons, Gao & Hitt, 2006). Therefore, it is assumed that, although the above notions have endured a radical amendment in the recent past, yet the key issues that impact buyer choices still remain. Notwithstanding the upsurge in consumption pattern of craft beer in India, for reasons lesser known, until now, no studies have been carried out to understand the consumer perspectives influencing brand loyalty to microbreweries. Therefore it is interesting to analyze the factors attracting consumers to microbreweries in order to cognize the rationale behind beer drinkers' assessments and adoptions vis-à-vis this relatively new product in Indian market. Hence, concerning the beer purchase process, the subsequent aspects chosen from literature: (a) brand image; (b) purchase criteria; (c) product attributes; (d) brewery attributes; (e) customer satisfaction, and (f) other products on offer were chosen to investigate the brand loyalty of customers to microbreweries. The following hypotheses have been framed on the basis of aforementioned discussions:

H1: Brand Image has a positive influence on Brand Loyalty among the consumers of craft beer

H2: Purchase Criteria positively has a positive influence on Brand Loyalty among the consumers of craft beer

H3: Product Attributes have a positive influence on Brand Loyalty among the consumers of craft beer



H4: Brewery Attributes have a positive influence on Brand Loyalty among the consumers of craft beer

H5: Customer Satisfaction has a positive influence on Brand Loyalty among the consumers of craft beer

Methods and Procedures

The aim of this research was to analyze the various factors affecting brand loyalty towards microbreweries in Bangalore to explain their effect and significance in altering customers' loyalty towards the brand. The research utilized an online survey administered through Google Docs platform. The survey consisted of closed ended questions which made use of a five – point Likert scale as well as an open ended question to obtain personal views of the respondents. The survey was designed to have three parts. The first part focused on the personal and socio-demographic details such as inter-alia age group, visitation frequency and status. The second part of the questionnaire was designed to focus on identifying dimensions of brand loyalty that influence consumers to microbreweries. The final part of the questionnaire involves measuring the other variables that form part of the hypotheses. Aspects regarding the attributes of the product, brewery, other products, etc. were focused upon.

The research of Ramiz and Qasim (2014) was used as the prime source of reference with regard to the various questions which measure the extent of each independent variable. Using a snowball sampling approach, the samples were obtained from real time customers of the microbreweries in Bangalore. As it was hard to list the entire population as well as to convince the consumers to respond, the researchers have to adopt this non-probability sampling. The customers were given the online survey tool designed by the researcher, on premises. The researcher was present at the brewery and the owners/managers of the breweries supported the data collection through convincing the consumers. Additionally, the owners were mailed the questionnaire, and asked to distribute them to their customers during the time of billing. This exploratory study refers to a sample of 358 individuals who visited the microbreweries in different parts of Bangalore. Multiple regression analysis was assumed to test the hypotheses.

Results

Socio-demographic profile

Individuals aged between 21 and 30 are more likely to visit microbreweries than people aged between 31 and 40 (130), while the over 40s are less likely to visit (67). The visitation frequency varied from once a month (53), twice a month (106), thrice a month (83), four times a month (65) and more than four times a month (51). Majority of the respondents were employed (320) with an income of more than 5, 00,000 per annum. Most respondents were educated with a technical degree or post-graduation (225 and 122). As there was a focus on price being one of the important factors while considering visiting the microbreweries, the respondents of this research opined that price is not the factor (328) that made them loyal towards a particular microbrewery in Bangalore. According to the study participants, brand loyalty depends on factors other than price of the products that are on offer.



Measurement scales and descriptive statistics

Constructs and Indicators	Mean (SD)
Brand Image ($\alpha = 0.76$)	
The brand is fashionable and trendy	2.22 (0.880)
This brand is reputation for quality.	4.13 (1.527)
This brand is elegant	3.44 (1.012)
This brand is well known and prestigious	3.91 (1.110)
Purchase Criteria ($\alpha = 0.84$)	
You buy this brand due to your status	3.42 (1.115)
Visiting this religious festival says a lot about who I am	3.45 (1.277)
You buy this brand due to high awareness	3.73 (1.299)
You buy this due to its attractiveness	3.34 (1.060)
Product Attributes ($\alpha = 0.88$)	
The microbrewery must serve a variety of Flavours of beer (more than 4)	3.84 (1.357)
The microbrewery must serve the type of beer I prefer (Ale & Lager & Stout)	4.31 (1.247)
The microbrewery must serve beers that vary in their alcoholic strength.	4.35 (1.342)
The beers must vary in terms of their bitterness levels.	4.26 (1.177)
Brewery Attributes ($\alpha = 0.81$)	
Adequate Parking Facilities (Valet OR Owner's Parking Space) must exist.	3.69 (1.660)
The ambience of the Brewery must suit my liking.	3.841 (1.764)
The microbrewery must be situated in close proximity to my place of residence.	3.68 (1.421)
The music played at the brewery must suit my taste.	4.38 (1.435)
Customer Satisfaction ($\alpha = 0.77$)	
Overall I am satisfied with specific experiences with the brand.	3.99 (1.410)
I am satisfied with my decision to purchase from this brand.	3.96 (1.487)
Brand Loyalty ($\alpha = 0.91$)	
This brand would be my first choice.	4.20 (1.251)
I consider myself to be loyal to this brand.	3.61 (1.372)
I will not buy other brands if the same product is available at the brand.	3.38 (1.409)
I recommend this brand to someone who seeks my advice	3.57 (1.491)
I get good value for my money.	4.00 (1.457)
I say positive things about this brand to other people.	3.78 (1.216)
I am willing to pay premium price over competing products to be able to purchase this brand again.	3.92 (1.231)
I consider this brand my first choice in the next few years.	3.28 (1.011)

Regression Analysis

Brand loyalty was considered as the dependent variable while the independent variables are the other factors such as Brand Image, Purchase Criteria, Product Attributes, Brewery Attributes, and Customer Satisfaction.



Dimensions	B(Coefficient)	Beta weight	Significance
Brand image	.266	.204	0.029*
Purchase criteria	.314	.356	0.001*
Product attributes	.141	.115	0.255
Brewery attributes	.104	.087	0.354
Customer satisfaction	.066	.063	0.435

$R^2 = 0.477$, $F = 19.599$, $P = 0.0001$, $B(\text{constant}) = 2.373$

The overall results of the multiple regression analysis yielded a R square value of 0.477 indicating that this set of independent variables accounted for 47.7% of the variance of the dependent variable, leaving 52.3% of the variance unaccounted for due to the presence of other factors that are probably the influencing factors for brand loyalty. The F statistics of 19.599 indicates that there is significant relationship between the dependent (brand loyalty) and the independent variables (brand image, purchase criteria, product attributes, brewery attributes, and customer satisfaction). The independent variables of product attributes ($\beta = 0.141$, $p = 0.255$), brewery attributes ($\beta = .104$, $p = 0.354$), and customer satisfaction ($\beta = 0.66$, $p = 0.435$) did not show significant relationship with brand loyalty. According to this, for the hypotheses H3, H4 and H5, the null hypothesis is accepted.

The independent variables of purchase criteria ($\beta = 0.314$, $p = 0.001$) and brand image ($\beta = 0.266$, $p = 0.029$) show a positive effect and has a significant relationship with brand loyalty. According to the above findings, for the hypotheses H1 and H2, the null hypotheses is not accepted and the alternate hypotheses stands accepted.

Analysis of open-ended question

In the research survey, an open ended question was asked to the respondents to suggest ways and means by which existing microbreweries can improve on their customers' brand loyalty factor. The researchers received 65 comments and suggestions. A few novel suggestions by the respondents are highlighted below:

- Have a wider choice of cuisine. Introduce customer loyalty programs. Keep innovating by removing the non-moving flavors and introducing new flavors.
- Have a Loyalty Card Program - to make customers revisit and likewise gain points or special calls for promotions / free taste of new brew unlimited for a week. Loyalty Card can be made more specific to gain points for the loyal brand of brew one tastes etc. which gives them one free starter on redemption of points etc.
- More information about the beer, with descriptions about the roots of it. Interaction of beer chefs with customers is recommended.
- Customizing beer brands and products to specific customer needs. That's is if you have the facility to make beer available for large party orders or pre orders or even gifting ideas, the option to create your own taste and flavor should be available.
- Consistency of their brew across batches, as well as the standardization of quality. Ergo, they need vigorous quality control to make sure that each drop of beer belonging to a certain brand tastes exactly the same.
- Interactive waiters who are trained to deliver quick service to a customer is also much appreciated. The waiters being friendly and approachable would add plus points to the brewery. A loyalty program for regular customers who order the same beer repeatedly could be offered a free loyalty program that grants him/her a unit of his/her free beer.



- Upon entry maybe once a week. A neophyte/erudite beer drinker having a vast knowledge about beer visiting the brewery for the first time, can be offered a loyalty program for a price he could opt to pay for if he really likes the beer which grants him a free beer of his liking upon entry into the microbrewery maybe once a week. The loyalty program could include a certain number of beers free per month. Another suggestion to attract more brand loyalty from a microbrewery's customer base is to engage the customers with some entertainment like provision of pool tables or maybe even beer pong tables. No microbrewery in Bangalore has a beer pong table as far as I'm aware. Provision of fire dancers, belly dancers or anything highly entertaining that appeals to a customer's visual and auditory senses would be far more appealing than the boring convention of DJ's or band performances. Instead of a microbrewery being like every other microbrewery, its uniqueness in terms of the beer and the overall experience a microbrewery delivers is what will attract a more loyal customer base. I highly dislike the current microbrewery scenario in Bangalore. Every microbrewery is like another.
- If they allowed customers to take home their beer. Like the Growler system in the US.
- Different types of beer and cider in particular. Also consistency in taste.
- More themed based, happy hours and offers. It could have beer festivals, themes on the lines of Bar Stock Exchange -Mumbai. Membership maybe?
- Appreciate ideas from customers and try to incorporate the same into their microbreweries (concerning with flavors of beer/ ambience of the place).

Apart from the repeated citations quoted above, a few occasionally cited dimensions include: quality, taste, color and promotion through various media. The aforementioned comments indicated by the consumers may be used as a source of valuable feedback with regard to the performance of the microbreweries in the current scenario. Making the microbrewery introduce a Loyalty Program was one of the most repeated suggestions received by the researcher. Loyalty programs are called what they are, for the sole purpose that they promote loyalty. It can be said that microbreweries are sure to face an upswing in sales and brand loyalty if they introduce loyalty programs.

Another important and notable recommendation received was that the microbreweries introduce flavors of the day, which could be offered at a cheaper rate to the customers. The rate of change of these flavors would determine the variety in the beers served, which in turn increases brand loyalty towards that particular microbrewery. Music played at the microbrewery was another important factor that has been identified. Bangaloreans seemed to give a lot of importance to the music played at the microbrewery rather than the other brewery attributes related to ambience.

Discussion and Conclusion

To support microbreweries in appreciating the patterns of consumer preferences for beer, the researchers explored the nature of consumers' interests as well as their perceptions on craft beer as well as other brewery characteristics in Bangalore microbreweries. Thus far, no studies available in the Indian context to understand the brand loyalty aspects on Microbreweries. There are studies attempted to investigate the craft beer consumption patterns and interest in the extant literature (Kleban & Nickerson, 2012; Lopez & Matschke, 2012; Sester et al., 2013; Donadini and Porretta, 2016; Gatrell, Reid & Steiger, 2018). In light of the beer industry's rapid growth and importance on small scale production and circulation, craft beer industry is essentially "more local" and "less global" than macro-brewers (Gatrell, Reid & Steiger, 2018) across the globe. Therefore it is important to gain traction by understanding what is of appeal for millennial consumers by



looking into various beer market segments. There is often confusion or a dilemma with the difference between price and “value for money” that defines the demand to orient themselves in the competitive market.

Nonetheless, the findings of this research indicates that more than 80% of the respondents felt price was not the only factor influencing brand loyalty towards microbreweries in Bangalore. This contradicts with the study findings of (Porretta & Donadini, 2008; Donadini et al., 2016). Other factors such as the ones previously identified by the researcher, were chosen as factors by the respondents to the survey, thereby indicating and proving further, the myth behind the assumption. The focus of the study has been on identifying attributes of microbreweries that are relevant to consumers to be loyal to a particular brand. For this reason, the attributes under investigation were selected through a customer centric approach and statistical tests revealed the patterns of significance among them. Rather than focusing on brewers’ views on what they thought the market wants, the consumer-provided inputs through responses to the open ended question should signal the craft beer industry the changing market values. Interestingly, the findings of the primary quantitative results did not support the relationship between product attributes, brewery attributes and customer satisfaction with brand loyalty. Similar findings are scarce in the extant literature specific to craft beer industry for purposes of comparison. The discrepancy of findings, may however be due to overly optimistic attitude of microbreweries in a competitive market place. However, based on these non-significant relationships, coupled with their comments, it appears that establishing brand loyalty for the Bangalore demographic in beer market is a challenge.

The outcome of this research benefits not only the general reader in his effort to understand brand loyalty, but also the owners of microbreweries and prospective owners of future microbreweries, in identifying core areas to concentrate upon, to achieve greater heights of customer loyalty towards their brand. Microbreweries have not faced a stop in growth in Bangalore and they are continuing to grow in other cities across India and also across the world. The importance of brand loyalty in the general sense can also never be understated. Continuous feedback from the customers, more orientation to marketing and mass communication and effective implementation of the suggestions offered by them, may be the best way to increase the efficiency of performance of the microbreweries. Given the intense competition, a robust brand strategy the microbreweries in Bangalore have to capture the target market to remind people why is it worth visiting their microbrewery.

Limitation

The sample size may be acceptable as this is an exploratory study. However, the authenticity of results will emerge through the application of this model to a larger sample size. Additionally, this model was only tested in a single city in India. Similar research may be conducted in different cities that have experienced the upsurge in the presence and growth of microbreweries, to test the robustness and effectiveness of the model. The model might have to be adjusted according to the various offerings of the different microbreweries as well as the perception of the respondents in that city. There may exist various other factors that influence brand loyalty towards a particular microbrewery, which may not have been identified in this research. An exploratory study may be conducted in order to first identify most factors which may be deemed fit, before measuring their influence on brand loyalty towards the microbreweries. Further testing, use of various models and more in-depth orientation of the researcher can help in the inclusion of the influencing factors.



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