定義「手工」啤酒

文　| Pippa Bailey 益普索創新總監、Ellie Brooke 益普索行銷公關專員
編譯 | Penny Huang 益普索公關行銷專員

手工啤酒的狂熱風潮已經到達一個臨界點，面對它風靡市場的情勢，大一點的品牌迅速反應，收購較小的啤酒製造商，然後發行自己的「手工」產品。較小的製造商因此開始質疑，如果大品牌有能力生產「手工」啤酒，那「手工」啤酒到底是什麼？它對整個產業的意義又是什麼？手工啤酒的成功或許也讓自己深受其害，迫使啤酒製造商和消費者重新思考「手工」啤酒的意義，看看這個名詞可以被如何延伸闡述。

手工啤酒在 1970 年代興起，當時大量生產的啤酒主導了整個市場，手工啤酒的出現正回應了這樣的市場狀況，以一種截然不同的產品填補了市場上的缺口。率先生產手工啤酒的獨立釀酒人開始在家釀酒，逐漸帶領起一波微型釀酒廠的風潮，他們產品強調在地性、有自己的傳統，啤酒配方中還添加了實驗性風味。手工啤酒的概念始於布里斯托（Bristol）和東倫敦這類地方，於是培養出一批城市中的粉絲。（註 1）

手工啤酒的成功顯而易見，在過去五年中該產業成長了 64%，目前不太有減緩的趨勢（註 2），因此國際品牌不得不對這樣的市場現況做出回應，設法收購世界各地的小酒廠。此外大酒廠也開始發行自己的產品，展示他們的「手工」資格認證和傳統。

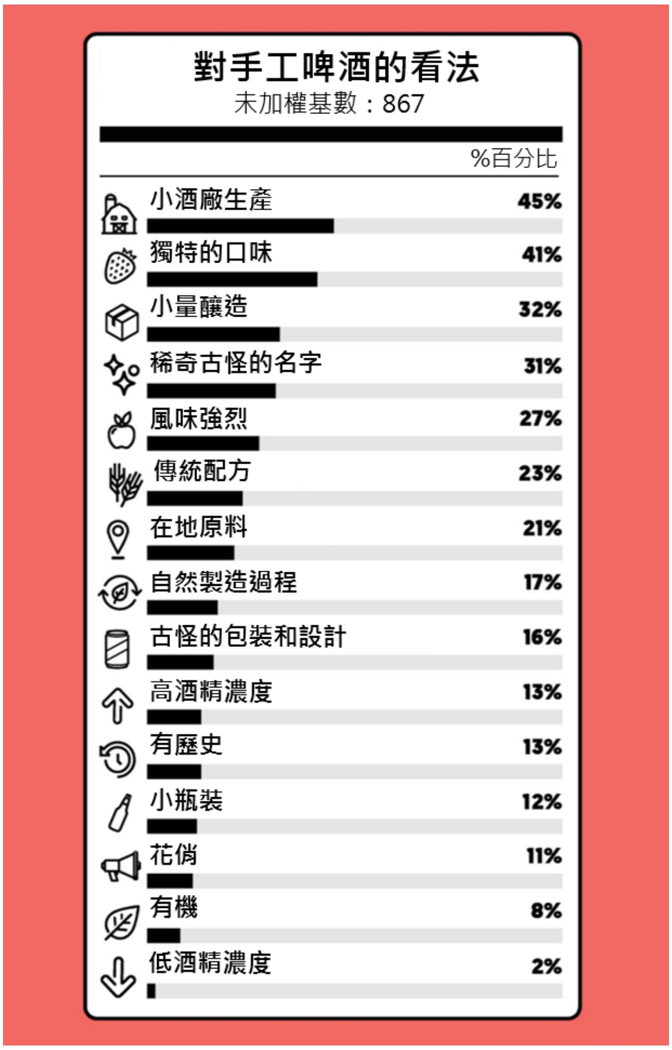
面對這樣的情勢，獨立釀酒廠開始捍衛自己的地位，並用多種方式企圖保護手工啤酒的價值不被稀釋。英國獨立釀酒商商會（SIBA）發行了一個標章來為獨立酒廠製造的啤酒認證，確保消費者不被大品牌裝做像是獨立生產的手工啤酒產品給誤導（註 3）。

隨著大品牌和獨立酒廠之間的戰爭逐漸白熱化，一個關鍵性的問題依舊尚未明朗──「手工啤酒」從來就沒有清楚而一致的定義。少了確切的定義，「手工」一詞幾乎失去意義：被製造商、零售商和消費者誤解，也缺乏獨特的賣點。重要的是，少了確切的定義，大小酒廠之間的戰爭將不會有輸贏，因為沒有「正確」的定義，自然也不會有「錯誤」的。

2017 年 12 月益普索調查了 867 位酒精飲品消費者，我們詢問受訪者，說到「手工」啤酒，他們最強烈聯想到的特徵是什麼？透過瞭解消費者怎麼看待「手工」一詞，我們能夠讓大小製造商知道可以怎麼和消費者溝通，符號學分析也顯示了大酒廠和獨立酒廠的「手工」品牌標誌傳達了什麼意涵與象徵。

我們發現談到手工啤酒，英國的消費者最容易聯想到的是製造規模：45%的受訪者覺得手工啤酒的定義是小酒廠生產，32%認為手工啤酒是小量釀造。區別性的特徵也同樣很重要，手工啤

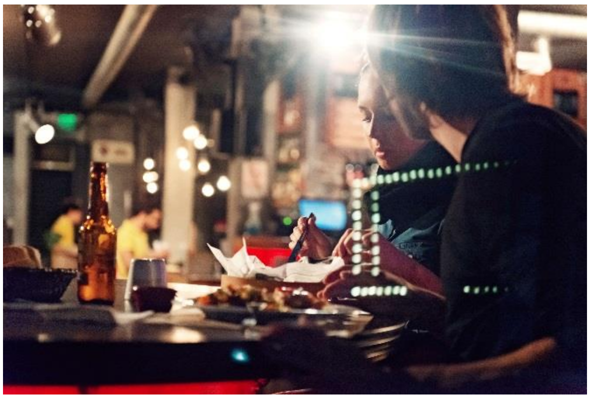
酒會讓 41%的受訪者聯想到「獨特的口味」，31%聯想到「稀奇古怪的名字」。有趣的是較少消費者會想到傳統配方的懷舊風情（23%）和「有歷史」（13%），而且非常少人認為手工啤酒是個健康的選擇。多數的消費者對手工啤酒只有粗淺的認識，撇開純粹主義者和品酒行家不說，多樣的味覺感受和風格選項是一般消費者選擇手工啤酒時的重點。



不同年齡層的消費者對手工啤酒也有不同的聯想。較年長的消費者容易想起它的傳統和發展初期的舊日時光，而對千禧世代而言，手工啤酒無疑是風格的代表。說到手工啤酒，將近三分之一 18 到 34 歲的受訪者會聯想到稀奇古怪的名字，24%想到古怪的包裝，18%想到小瓶裝。相較於超過一半的 35 歲以上受訪者想到來自小酒廠，只有不到五分之一 18 到 24 歲的受訪者有此聯想。同樣地，年輕的消費者較不會想到釀製方式；只有 11% 35 歲以下的受訪者想到釀酒的自然過程或傳統配方（20%）（註 4）。

益普索與一個酒吧營運商的行銷經理聊過，該營運商在全英國經營了 690 間酒吧，從商業重鎮的酒館，到鄉村旅店和夜生活場所都有。他們對消費者與手工啤酒的經驗基本上與我們的調查結果相符。他們發現千禧世代喜愛手工啤酒是因為它們的限量供應和有趣的包裝設計，因此手工啤酒逐漸改成了鋁罐裝的形式，這樣當它們陳列在酒吧、夜店時，包裝設計更能顯露出來。而為了迎合千禧世代喜歡感到「限量供應」的偏好，酒吧善用行銷策略，例如在特定的夜晚在倒數佈告牌上詳列出某些品牌還剩多少量，讓消費者更感覺到產品的獨家性和小量生產。嘗試這樣的手工啤酒就像是在開拓新事物，揭開前所未有的體驗，對於這個可能在 Instagram 上昭告天下、分享他們新發現的世代而言，這樣的事情令人引頸期盼。

大家認為除了專業的消費者外，通常一般的消費者並不會察覺一瓶「手工」啤酒是不是大酒廠



出品，如果包裝和口味符合期待，他們大多不在意。棕色玻璃瓶會激起對手工精品的復古情懷——與大量生產的啤酒相反；古怪奇特的名字為品牌敘述增添個性，回扣到啤酒商本身；充滿活力的形容詞（強大的、徹底的、狂野的）和水手意象讓消費者聯想到陽剛氣質，而潛藏在手工啤酒商品標籤上一些少見的吉祥物，也具有同樣的功能。想贏回渴望客製商品和手工精品的消費者，這些大酒廠使用的方法其實並不特別，在其他產品類別中也出現過。以英國連鎖書店 Waterstones 為例，因為消費者渴望更個人化、在地化的體驗，並且反對「大品牌」（註 5），他們曾以其它名字開設三間書店，店面設計得像是獨立書店。而 L'Oréal 在 2014 年時也宣布收購成長最快速的對手品牌 NYX，確保自己能夠滲透較年輕的消費族群（註 6）。

我們的研究清楚顯示，是消費者和他們對於手工啤酒的認知比找出確切的定義更重要，因此可以說，連嘗試為手工啤酒引進嚴格的識別方針和認證都是徒然的。大製造商都可以透過奇特的名字、傳統配方或特殊口味，輕易向消費者暗示那些驅動他們購買的關聯特徵，無論配方傳不傳統、是不是隸屬大品牌都沒有關係。我們也必須記得啤酒產業所提供的商品一直都是同質的，因此無論這些新種類被如何定義，任何新引進的口味、包裝，或該產品類別改善的使用體驗，都是非常令人興奮的。

硬要給手工啤酒一個定義（這是多數小酒廠想要的），會讓這個產業淪為為了滿足特定條件而虛應其事。製造商應該專注在結合我們知道消費者所想要的特質，並利用它們讓產品吸引力和購買最大化。最大的酒廠當然有能力、財力和影響力來這樣做，然而小製造商擁有創意和快速創新的能力。這個定義之爭並不是「對」與「錯」，而單純是誰能最有效地滿足消費者的期待和取悅消費者。

圖 1：這些品牌標誌都與航海有關，呈現「堅忍不拔的歷史」，而採用的原料「來自遠方」，同時也兼具了品牌敘事的角色。

圖 2：古怪前衛的名字為選擇手工啤酒帶來某種離經叛道的感覺，這回扣到消費者的自我風格，讓他們覺得彷彿做了什麼踰矩的事，同時也感到自己對啤酒產品更有選擇權。

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Ipsos Marketing 益普索行銷研究

Ipsos Marketing 是益普索集團旗下致力滿足客戶創新與品牌增長需求的事業體，根據不同的市場調查需求，我們再區分成：創新與預測、市場與品牌宣傳、醫療和質化研究等四大領域。我們的行銷研究專家專門協助企業夥伴把市場趨勢轉換成產品競爭優勢，並持續提供創新的市場研究模組，幫助夥伴更有效運用管理市場研究預算。我們也善用利用科技和研討會，結合不同的資料整合知識，幫助企業獲得即時的市場洞察。

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執行總監 Ruth Yu 于泳洳

02 2701-7278 ext.130 Ruth.yu@ipsos.com

Crafting a Definition

Pippa Bailey, Marketing, Ipsos

Ellie Brooke, Marketing, Ipsos

The craft beer revolution has reached tipping point. Perhaps a victim of its own success, the revolution is forcing brewers and drinkers alike to reconsider the meaning, and see how far the term can be stretched. Bigger brands are reacting swiftly, buying up smaller breweries and launching their own 'craft' products. But it's driving smaller producers to question; if large brands have the capability to create 'craft' beer, what actually is 'craft' beer, and what does this mean for the industry as a whole?

Beginning life in the 1970s, as a response to the mass production of 'fizzy beers' dominating the market place, craft beer filled the gap in the market for something totally different. Individual pioneers began brewing beer at home, which evolved into a wave of microbreweries where the products were local, had an individual heritage and used experimental flavours in their recipes. Conceived from places such as Bristol and East London, a new urban audience for beer was born.[1]

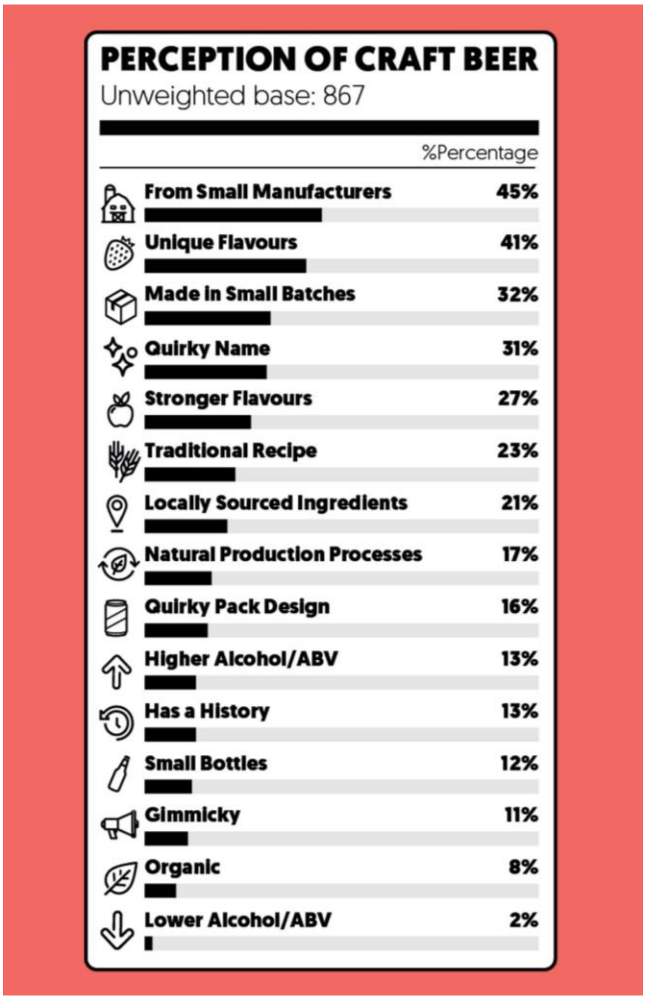
The success is clear to see; in the past five years, the craft beer industry has grown 64% and shows little sign of slowing down[2]. As a result, global brands have had no choice but to respond, and have sought to buy into small breweries all around the world. As well as buying smaller microbreweries, the big breweries are launching their own products to show off their 'craft' credentials and heritage.

In response, independent breweries have looked to defend their position, and there have been multiple attempts to protect the notion of craft beer becoming a diluted concept. The society of independent brewers' association (SIBA) have launched a 'seal' to recognise beers produced by independents and ensure consumers are not misled by craft products from larger brands posing as such.[3]

As the battle between the large brands and independent breweries intensifies, a key question remains unclear. A hard definition of the term 'craft beer' has never been solidified. Without this, the term 'craft' is almost redundant: misunderstood by manufacturers, retailers and consumers alike, and lacking a unique selling point. Importantly, without a definition, the battle between the large and small players will never be won or lost. Because without a 'right' definition, there isn't a 'wrong' one either.

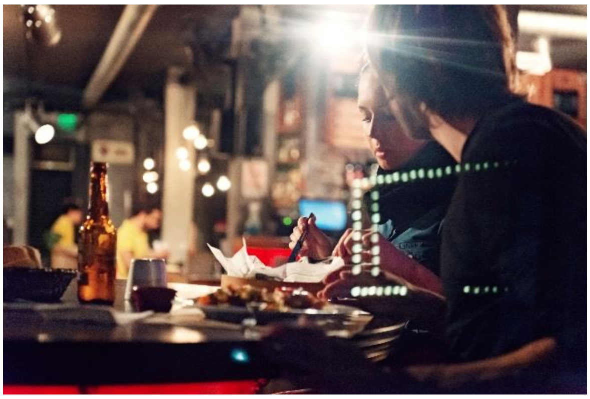
In December 2017, Ipsos surveyed 867 alcohol consumers, where we asked them to tell us which attributes they most strongly associate with 'craft' in respect of beer. By understanding how the consumers themselves perceive "craft", we are able to show how manufacturers large and small can communicate craft to consumers. Semiotic analysis also revealed what signs and symbols 'craft' logos from large and independent breweries conveyed.

We found that UK consumers are most likely to associate craft beer with the scale of production: 45% believe craft beer is defined by it being from small manufacturers, and 32% view craft as being brewed in small quantities. Distinguishing features are also really important; 41% associate craft with ‘unique flavours’ and 31% with having a ‘quirky name’. Interestingly, consumers have weaker associations with nostalgic ideas of traditional recipes (23%) and ‘having history’ (13%) and very few see craft as being a health choice.[4] The majority of consumers only have a cursory understanding of craft beer. Purists and connoisseurs aside, the varied taste and style options are the most important distinctions when consumers seek a craft beer.



Associations of craft beer differ by age group, with older consumers having stronger nostalgic associations in its traditional and local infancy, and for the millennials it’s all about style. Almost a third of 18-34 year olds (30%) associate craft with quirky names, 24% associate craft with quirky pack design, and 18% associate craft with small bottles. Less than one in five 18-24 year olds associate craft beer with coming from a small manufacturer compared to more than half of those aged 35 and above. Similarly, younger consumers see weaker associations with production methods; only 11% of respondents under 35 associate craft beer with natural processes, or traditional recipes (20%).[4]

Ipsos spoke to a Marketing manager of a pub operator, which runs 690 pubs and bars across the UK; from high street pubs, to country inns and late-night venues. Their experience with consumers and craft beer broadly align with our survey findings. They see millennials seeking craft for its limited supply and interesting packaging and artwork. In response to the latter, there has been a move to canned formats, which allow for the graphics to stand out better when displayed in bars, pubs or clubs. Furthermore, in reaction to millennials liking of perceived ‘limited supply’, which plays into their desire for exploration and discovery, pubs are leveraging marketing tactics, such as count down boards which detail how many pints of a certain brand are left on a particular night, which adds to the perception of exclusivity and small batch production. Seen as breaking new ground and uncovering a new experience, it's an exciting prospect for this generation, who are likely to announce and share their 'discovery' on Instagram too!



Aside from the connoisseur consumer, it is generally understood that consumers are not aware whether a 'craft' beer is owned by a big brewer or not. If the packaging and flavours align with their expectations, they are mostly oblivious. Brown bottles evoke the nostalgia of artisanship – counter to mass-production; quirky names add personality to the brand narrative connecting back to the craft brewer himself; dynamic adjectives ("powerful" "proper" "wild") and seafaring images connect the consumer to a highly masculine space as do unusual mascot characters that are an embedded part of craft labels. The approach big brewers are using to win back the consumers who desire more bespoke and artisan products isn't unique, and has been seen in other categories. Waterstones for example launched three bookstores 'incognito', designed to look like independents, in response to consumers wanting something more personal, local and anti 'big brand'.5 Similarly, in 2014, L'Oréal announced the acquisition of one of its fastest growing rivals NYX cosmetics, to enable the company to tap into a much younger consumer base.[6]

Our research clearly demonstrates that it is consumers and their perceptions of craft beer which override attempts to settle a definition and thus, you can argue it is fruitless to even attempt to introduce strict guidelines and accreditation about what is and what is not a craft beer. The associated attributes that drive purchase can be signalled just as easily by large manufacturers, whether this be a quirky name, a traditional recipe or a distinct flavour, regardless of whether the recipe is traditional, or the name is part of a super brand family. We must also remember that the beer industry has historically been homogeneous in its offering, and therefore any injection of flavour, packaging or enhanced experience in the sector is extremely exciting, regardless of how these new varieties are defined.

Forcing a definition onto craft beer (which is what most microbreweries desire), will turn the industry back towards box ticking. Instead, companies should focus on combining the attributes we know consumers desire and leveraging these to optimise appeal and purchase. Of course, the largest breweries have the power, money and influence to do this, however, the small microbreweries have the creativity and the ability to innovate at much quicker speeds. The argument of the definition is not 'right' vs. 'wrong' but simply who can deliver against expectations most effectively and delight the consumer.

Figure 1: These logos, all with nautical references, represent a 'gritty history', and including ingredients that 'came from afar' – doubling as the 'character' of the brand narrative.

Figure 2: Quirky, edgy names create something illicit about the selection of a craft style beer, which extends to the identity of the consumer, making them feel transgressive and more selective in their choice.

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or contact our research team:

Ruth Yu, Executive Director

02 2701-7278 ext.130 Ruth.yu@ipsos.com