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Insights from Pennsylvania: Marketing agritourism for the American cider culture

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Insights from Pennsylvania: Marketing agritourism for the American cider culture

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Abstract

Destinations and activities for travelers are greatly influenced by official tourism agencies that promote their local resources. Marketing for well-known places like breweries or vineyards can be straight forward, but destinations without clear descriptions can be more challenging. This paper examined how cider is defined, promoted, and marketed by official tourism websites to evaluate its potential for supporting the agritourism industry given the resurgence in craft beverages and increased public interest to purchase local products. Discrepancies between federal and state regulations of cider contribute to the public's lack of awareness of what cider is, who can make it, and how it can be sold. A Quantitative Content Analysis (QCA) was used to evaluate how cider was marketed as a travel opportunity, particularly with its connections for agritourism. The methodology includes a set of questions that systematically evaluate text, graphics, and videos displayed on official tourism websites. While this study focused on Pennsylvania, it also compared and contrasted marketing strategies of other top cider-producing states. Results indicate that food and drink tourism is important and most states promote locally made beverages. Although cider was included in many of these promotions, it was inconsistently placed amongst other products. Cooperation and communication between local, state, and federal agencies in addition to local businesses could potentially improve cider sales and bring economic opportunities to rural communities wanting to increase agritourism.

Key Words

cider, craft beverages, agritourism, ale trails, tourism promotional agencies

Introduction

In the United States, small, local, independent producers have economically and socially influenced the alcohol industry. Craft beverages have transitioned from a niche market, to prominent economic businesses within local communities. This recent change in the alcohol industry has impacted tourism, with an increased number of Americans seeking new experiences as part of their vacation time, particularly to destinations where they can sample food and drink from different regions. Although beer and wine are at the forefront of this movement, hard cider production (referred to as simply cider from here on in) is increasing along with consumer interest.

A few European countries proudly promote their cider industry as it is closely connected to their cultural heritage. However, in the United States, cider production for the past hundred years has been limited, and discrepancies between federal and state laws exist that muddle consumer awareness of and accessibility to the product. This study used a rubric to quantitatively evaluate how official tourism websites promoted local, artisan beverages to determine whether they included cider. These assessments connect how discrepancies in cider definitions may impact marketing and promotion for tourism and influence the American cider industry.

Growth of Artisan Beverages

Beer and cider were incredibly important to the settlement of North America. Breweries were some of the first buildings erected and apple seeds were often planted immediately upon arrival. One of the most efficient ways to store a harvest was in liquid form, as beer could preserve barley and cider preserved apple juice (Watson, 2013). Cider, the fermented beverage made from apple juice, was one of the most common beverages in colonial America until the introduction of lager beer. Following Prohibition, the beer industry in the United States experienced a steady growth in consumption along with the consolidation of breweries. By 1975, 75% of beer was made by five companies, with Anheuser-Busch, Miller, and Schlitz-Stroh leading the production (Batzli, 2014). During the second half of the 1900s, new technology and improved distribution networks created a culture where mass produced beer became popular and cider became nearly non-existent (Feeney, 2015).

Today, large mass-produced brands still hold the market, but consumers are increasingly selecting independent, craft beers (Reid, McLaughlin, and Moore, 2014). A fundamental shift in

the types of alcoholic beverages consumed in the United States has occurred with a growing interest in products made by small, independent producers (Flack, 1997, and Schnell and Reese, 2014). This growth is an extension of the neolocal movement described by Tuan (1991) as a conscious commitment to preserve and support local economies and social networks in an era of mass production and global consumption. The beer industry exploded from only eight craft breweries in 1980, to almost 2,500 in 2013, with 98 percent of all breweries in the United States being small and independent (Hoalst-Pullen et al., 2014). The Brewers Association (2019) reported that the nearly 8,000 craft breweries generated 25 percent of the \$114 Billion beer sales market in 2018.

Although cider represents a smaller portion of the overall alcohol industry, it is also experiencing tremendous growth as part of the neolocal movement. Jordon (2016) states that from 2006 to 2012 the cider industry increased 73 percent in gallons produced nationally. This increase was first recognized by some of the larger, commercial brands; Angry Orchards, for example, reported a 90 percent growth in sales in 2012 (Kline and Cole, 2017). By 2015, the United States had 526 cider producers in 44 states. In the last five years, the number of gallons produced has increased 27.3 percent annually, along with a reported \$300 million in revenues in 2016 (Becot, Bradshaw, and Connor, 2016),

Unlike the demographics seen in the craft beer industry, which is predominant male (McLaughlin, Reid, Moore, 2014), cider consumers represent an equal 50/50 male to female ratio (Withers, 2017). Cider is enjoyed by all age groups, from generation Z to baby boomers; however, the strongest consumer demographic is in the 21 to 35 year-old age range, who also exhibit an eagerness to experiment with new flavors (Park 2014). Without grain or additional sugars, cider is an attractive option to those on gluten-free diets and to those seeking locally sourced, all-natural ingredients. As a result, the number of cider drinkers rose from five to 18 million between 2012 and 2016, and is expected to grow another 15 percent in the next five years (Kline and Cole, 2017).

Cider's Definition

Likely due to limited cider production since Prohibition, many consumers in the United States are unsure exactly what cider is and how it differs from other beverages. Cider is a beverage made from fermented apple juice, where approximately one bushel of apples produces

three gallons of cider. To produce cider, fruit is harvested, milled, and pressed into mash; some cider makers skip this process and purchase fresh juice or concentrate. Different varieties of apples, particularly more acidic ones, have more tannins and create complex flavors where additional sugars are not needed. Tannins are the naturally occurring compounds found on the stems, seeds, and skins of fruits such as apples, pears, and grapes that produce an astringent sensation to the tongue. Commonly found in dry wine, tannins produce cider with a full-bodied beverage. The juice is fermented for 2-4 weeks with natural microorganisms or yeast. It is often stored for a few months to several years in order to develop complex flavors. This end product can be blended with fruits, honey, spices, hops, or other agricultural products (Cook, 2018).

In the United States, The Alcohol and Tobacco Tax and Trade Bureau (TTB) enforces provisions for alcoholic beverages, and administers and regulates the industry at the federal level. The TTB has three classifications of alcoholic beverages: beer, wine, and spirits. It does not have a classification for cider. In 1986, under the Internal Revenue Code (IRC), TTB recognized a variety of other products that were at least 0.5 percent alcohol by volume and needed to be regulated as an alcoholic product. Cider became classified as a still wine (26 U.S.C. 5312).

For nearly thirty years, cider was restricted to certain ingredients and carbonation levels, but the H.R.600-Cider Act went into effect in December 2015, which broadened the criteria for cider and changed its tax rate (TTB 2017). The new statutory definition of cider increased allowable levels of carbon dioxide per hundred milliliters of wine from 0.392 to 0.64 grams, and raised the allowable alcohol by volume (ABV) from seven to eight and a half percent. Additionally, it allowed the use of pears, pear juice concentrate, and pear products in the flavoring, and changed the tax rate to be more similar to that of craft beer (TTB 2019).

The Twenty-first Amendment repealed the prohibition of alcohol in 1933 at the federal level, however, it left each state responsible for its own regulations (US Const. amend. XXI). Different states allowed producers to make cider under variations of beer and winery licenses. These differences between state and federal laws account for some of the variations seen throughout the United States in the number of craft breweries, wineries, and distilleries which has been examined in the academic literature (Baginski and Bell, 2011), but cider has remained under-studied. Without a national classification for cider, the production, taxes, sales, and types of experiences for local consumers and tourists may vary greatly.

Agritourism Growth

Along with the increased production of local, independent beverages, consumers have developed the desire to learn about products, socialize with producers, and sample at the place of production. Artisan beverages have transformed the alcohol industry from a simple drink to a sophisticated and complex consumer commodity (Withers, 2017). This industry has changed attitudes toward travel and leisure and created new opportunities for rural areas. Craft beverages contribute to positive place-based tourism and have the potential to offer sustainable options to rural, suburban, and urban communities (Slocum, 2018).

Tourism is one of the fastest-growing business sectors in the world, and many tourists spend recreational time traveling to places of food and beverage production to seek out new palate experiences (Veeck, Che, and Veeck, 2006). Variations in language used to describe these experiences, such as gastronomic tourism, food tourism, agritourism, wine tourism, and beer tourism, reflect a focus on the unique types of cultural experiences that a specific location's food and drink can provide. Travelers journey to farms, vineyards, breweries, festivals, trade shows, and farmers markets to indulge their palates, while also immersing themselves in local traditions, cultures, economies, and communities. These experiences create enjoyment for the traveler that extend past the basic intake of food and drink to include education at the source of production; travelers also glean pleasure from the regional environs, recreational activities, and cultural lifestyles (Hojman and Hunter-Jones, 2012).

Agritourism feeds on nostalgia for the vanishing rural past and on many people's affection for the countryside, as our society becomes more urbanized. Schnell (2011) suggested that part of the growth in agritourism can be attributed to recent food scares and terrorism as travelers increasingly yearn for a peaceful, rural vacation. Rural spaces are often idealized and conjure up notions of authenticity, and the resulting rapid increase in agritourism proves to be economically and socially beneficial to rural spaces (Wright and Weston, 2018).

For the consumer, traveling and purchasing a product at the farm is not economical, since prices are often higher than at chain stores (Essex, Gilg, and Yarwood, 2005). Visitors are willing to pay more for the added value of the experience of a tour, recreation, and social opportunities (Veeck, Che, and Veeck, 2006). Björk and Kauppinen-Räsänen (2014) found that patrons were willing to spend more on local products to support the environment, health, ethics,

sustainability, and the community; customers perceive local products to be fresher, tastier, and more trustworthy.

Successful agritourism develops not only from a peaceful landscape and the sale of quality products, but also from proper marketing (Colton and Bissix, 2005). Agritourism must market traditional rural landscapes with core values such as simplicity, service, and personal touch. Education is another core component, particularly for those traveling from urban areas where the patrons may be far removed from farming practices; however, most farmers have very limited capacity or expertise on the subject of marketing and tourism, and thus, promotional support is critical (Kline and Cole, 2017).

Many positive benefits come from agritourism. It has been hailed as a vehicle for regional development that can strengthen local production and provide new economic and social opportunities for rural communities (Everett and Slocum, 2013). The concept of eating locally supports unique products produced in an ecologically friendly, sustainable way, empowers self-sufficient people, and promotes alternative farming activities that can contribute to agricultural sustainability through a diverse economic base (Colton and Bissix, 2005). Additionally, regions surrounding tourist attractions can potentially experience increased revenue for related businesses such as hotels, gift stores, and gas stations.

A few well-known places such as Bordeaux, France; Tuscany, Italy; and Napa Valley, California, have greatly benefited from agritourism, but Carmichael and Senese (2012) reported that lesser-known rural areas have also seen rapid growth and experienced economic and social development (Ferreira and Muller 2013). According to Halladay (2012), from 2005 to 2012, Virginia's wineries experienced a 106 percent increase in tourism, contributing \$747 million annually to the Commonwealth, and the Kentucky Bourbon Trail reported over 450,000 visitors in one year. Another study by Murray and Kline (2005) found that beer tourists in rural North Carolina spent on average \$1,000 per trip. In 2013, 17 percent of American travelers engaged in drink-related activities (Cutis, Bosworth and Slocum 2018), and many destinations started to promote wine and ale trails (Feeney, 2017).

The east coast of the United States is ideally suited to support cider agritourism, with abundant natural resources that are within close proximity to major urban areas. Cideries with tasting rooms open to the public are ideal places to encourage agritourism as educational, family-friendly destinations. Many states such as Vermont, New York, and Virginia have abundant

apple orchards, flourishing cider industries, and strongly support craft beverage tourism. However, the majority of drink-related research has focused on wine regions or craft beer. Cider agritourism has been relatively ignored in the academic literature (Wright and Easton, 2018). Thus, this paper examined how one state's tourism promotional agencies marketed cider and determined discrepancies that could provide insights for the American cider industry.

Case Study: Marketing Tourism for Pennsylvania's Cider Industry

This study quantitatively evaluated Pennsylvania's cider industry and how it was marketed for agritourism. The state was selected based on its central location within the Mid-Atlantic, leadership in national craft beer production, abundant agricultural landscapes, plentiful apple production, and emerging cider industry. Ryan, DeBord, and McClellan (2006) claimed that with its abundant artisan beverages and agricultural landscape, Pennsylvania is ideally suited to develop a strong agritourism industry.

In contrast to the federal description of cider as a still wine, Pennsylvania Liquor Code considers cider to be a malt or brewed beverage. To bridge the gap between state and federal regulations, a brewery in Pennsylvania who produces hard cider must apply for permission from the TTB (Brewers of PA, 2019). Additionally, Limited Winery (LK) licenses can also produce, distribute, and sell cider in Pennsylvania. As described in Section 502 of the Pennsylvania Liquor Code, the intent of this license is to promote tourism and recreational development by producing alcoholic cider, wines, and wine coolers from agricultural commodities grown in Pennsylvania (PLCB, 2015). Producers can sell by the glass or bottle and may sell food for consumption on premise; they can also apply for special permits to sell their products at expositions and farmers markets.

Pennsylvania's cider industry has been growing in recent years, in part due to its abundant agricultural assets. Apples were grown commercially in 32 states in 2019, and Pennsylvania ranked 4th in acreage under cultivation (USDA, 2019) amongst the top ten apple-producing states that included Washington, New York, Michigan, Pennsylvania, California, Virginia, North Carolina, Oregon, Ohio, and Idaho, respectively. The TTB releases yearly summaries of taxable cider production by state (ATF P 1323.1). The most recent summary statistics available through 2017 ranked Pennsylvania 13th nationally in volume production, with over \$25 million in sales (Pennsylvania Pressroom, 2017).

At the state level, it can be difficult to identify cider producers as it can be made with a brewery or Limited Winery license. In January 2019, Pennsylvania had 528 brewery licenses (329 active, 31 pending, 144 expired, and 24 safe keeping) and 501 Limited Winery licenses (334 active, 14 pending, 140 expired, and 13 safe keeping) (PLCB 2019). At the time of this study, the United States Association of Cider Makers (2019) and the Pennsylvania's Cider Guild (2019) identified approximately 45 active cider producers in the state.

A Quantitative Content Analysis (QCA) was used to evaluate how cider is marketed as a travel opportunity, particularly with its connections for agritourism. QCA method systematically applies a set of questions to evaluate text, graphics, and videos, in this case, on official tourism websites. Muehlenhaus (2011) provided a critical review of the benefits of QCA and stressed its strength as a research method. For QCA to be valid, research questions must be determined prior to study, thus making them replicable by any individual.

A rubric was used to determine if tourism websites promoted local, artisan beverages, and if so, how they categorized types of beverages and whether or not they included cider and promoted those local businesses into an organized tourism trail. Between April 15 and 30, 2019, two researchers worked independently to rigorously apply the questions. Their results were compared and discrepancies between answers were double checked. Each website was evaluated to determine if local beverages were connected to other activities and regional points of interest. Additionally, tourism websites from other top-ranking cider producing states were evaluated to see how Pennsylvania's tourism marketing strategies compared to surrounding markets. The results provided sound descriptive statistics and qualitative measures. Outcomes determined if marketing strategies informed the public about cider, identified potential agritourism regions, and assessed strengths and weaknesses in their abilities to promote the emerging cider industry.

Results

A QCA was applied to Pennsylvania's official tourism promotional agencies' webpages to determine if they included cider with other local food and drink. Although it must be noted that tourism promotional agencies usually require membership, and thus their websites usually promote their member's interests, the QCA provided a quantitative measure of how often, and in which ways, cider was included with other artisan beverages. VisitPA is the official tourism

agency for the state and lists addresses and websites for the 53 official promotional agencies within the state that promote their city, county, state, or region (VisitPA 2019).

Several sets of questions were determined prior to the start of this research and systematically applied to evaluate text, graphic, and/or video information on each of the 53 official promotional agency webpages. The first set of QCA questions focused on the homepage to determine if local beverages were advertised and marketed, and if so, what type. Nearly half (27 of 53) of the promotional agencies had text, graphics, or videos marketing local beverages on their home page. Local wines were the most frequently marketed and appeared 20 times on promotional agencies' homepages, followed by craft beer (18 times), and spirits (eight times). Beverages were commonly grouped together, with 12 homepages marketing both wine and beer, and seven of those pages promoting local beer, wine, and spirits.

Cider appeared on two agency homepages. The Crawford County Convention and Tourist Bureau was the only agency that promoted wine, beer, spirits, and cider on their homepage. A prominent part of their webpage was a seasonal promotion, "Wine, Ale, and Spirit Trail," with the subheading "From Craft Beer to Ciders, come visit Crawford County, PA and see what we have to offer! You'll be pleasantly surprised!" They listed 12 local businesses with a short text description, the company's graphic logo, and a 3:50 minute video that highlighted each business. An orchard, apples, milling of juice, and family-friendly taproom were promoted for the Davenport Fruit Farm, Cidery, and Winery.

Only one homepage highlighted and solely promoted cider, separate from beer, wine, or spirits, as a tourism attraction. Destination Gettysburg displayed a photograph of Adams County Winery and a photograph of Reid's Winery and Cider House on their main page. Additionally, they had a prominent image and heading focused on cider with the caption, "Adams County Cider-Authentic Flavor." That link provided more information on cider using terms such as "core values, family-friendly communities, and local farmers." A video highlighted individuals and promoted traditional farming lifestyles, including an interview with a 7th generation farmer and cider maker.

The next set of QCA questions focused on subsections of the tourism website pages and found that 40 of the 53 agencies (75 percent) had a subheading, section, or additional page promoting artisan beverages. Headings used for these pages had a variety of titles, but commonly combined beverages such as "Wineries, Distilleries, and Breweries" or "Wineries and

Breweries.” A few agencies listed individual beverages with titles such as “Wineries,” “Wine Country,” “Ale Trails” or “Breweries.” One specific example of an agency that tried to promote local beverages, with a somewhat confusing result, was found on the Visit Clearfield County webpage. The home page had a tab called “Attractions” under which was a second sub-heading called “Spirits.” The Spirits page was subsequently divided into wineries, breweries, and distilleries where they listed five wineries, two breweries, and two distilleries; however, neither of the two establishments listed under distilleries were described as making spirits. The first distillery listed is Benezette, whose webpage described it as a winery. The second business was Kunes Farm, where the longevity of their orchard was discussed, along with a claim that they had mastered hard cider brewing. Only two tourism promotional agencies promoted cider as a prominent attraction. Cumberland Area Economic Development Corporation had a heading “Cideries and Distilleries,” and Destination Gettysburg was the only agency that had a separate titled called “Cider.” In total, 18 agencies grouped cider with other types of beverages. However, there was no consistency as to whether cideries were placed with wineries or breweries.

The final questions in the QCA evaluated whether or not websites had an organized tourism food and drink trail, and if so, whether cider was included. The term “trail” was loosely used in 17 tourism webpages. Many agencies referred to a trail, but rather than a designated path or geographic structure to encourage directed movement, the term was used to vaguely describe a collection of establishments. Cideries were included in 11 of the 17 promotional trails. Very few of the promotional agencies included additional agritourism activities or referenced farms, orchards, or tap rooms where consumers could learn about cider. Two agencies, Destination Gettysburg and Visit Clearfield Country, referenced or showed graphics of apple orchards; Lawrence County Tourist Promotional Agency and Crawford County Convention and Tourist Bureau described wholesome, idyllic farms.

While this study could not include the review of every tourism promotional agency in the United States, the official state tourism websites from top cider-producing and neighboring apple-producing states were evaluated as a comparison to Pennsylvania. Review of these websites focused on whether or not cider was discussed, if it was connected to other artisan beverages, and if it was connected to other agritourism activities, to determine how Pennsylvania compares to other states and identify strengths and weaknesses.

Pennsylvania's state website (VisitPA 2019) had a main section heading, "Things to Do," where activities were categorized by interests. The link "Beer, Wine and Food" discussed Pennsylvania's rich culinary heritage, suggested u-pick activities, and encouraged purchasing farm fresh produce and meats, touring and tasting wineries, and visiting the oldest operating brewery in the country. This page did not mention cider.

Oregon and Washington were the nation's top two cider producers in 2017, and the Pacific Northwest is often associated with artisan beverages. Travel Oregon (2019) is the official website for the state, which had three main headings, one of which was called "Things to do." That tab had a link "Eat and Drink" that included 11 categories such as seafood, culinary experiences, and farmers markets. One of the 11 categories was "Cider and Cideries," which navigated to a page with images of apples and text that highlighted heirloom fruit. The page suggested several tours that were linked to other agritourism activities, such as exploring Hood River, hiking a trail, and enjoying oysters along the coast. The page displayed pictures of tasting rooms, farms, and country orchards, and included an interactive map with 22 places to visit. In contrast, Washington State Tourism Alliance (2019) had a main page with eight major links. The first link, "Food, Beer, Wine, and Spirits," described the state's bountiful natural resources, successful wine industry, glacial fed streams for beer, and the growth of distilled spirits. This page did not mention cider.

The nation's third largest cider producer in 2017 was Michigan. The official tourism website produced by the Michigan Economic Development Center (2019) had a page titled "Things to Do." One of the 12 options included "Farms and Cider Mills" amongst other activities such as amusement parks, lighthouses, and planetariums. Unlike other states, beer, wine, and spirits were not listed as a destination activity. The page displayed pictures of apples and children picking fruit in orchards, and discussed farm fresh taste along with experiences such as pick-your-own, corn mazes, and hayrides.

New York and North Carolina were the fourth and fifth largest cider producers in 2017. The New York Department of Economic Development website (2019) had a subsection on cider, where they discussed the history of the beverage and how, at one time, cider was more popular than beer. They proudly promoted the fact that the state ranked second in the nation for apple production, and touted renowned cideries as great for tasting and family-friendly activities. The Economic Development Partnership of North Carolina (2019) promoted numerous food and

drink activities under a page titled “Eat and Drink.” One of the links, “How Sweet It Is: Hard Cider and Tasting Rooms,” discussed emerging cideries to complement wineries and breweries in the state. The page noted apple production and suggested traveling to the western part of the state, where there is a burgeoning cider scene. Eight cider companies were listed, along with a cider festival that occurs in the fall.

Although not in the nation’s top five cider producers, The Commonwealth of Virginia shares similar characteristics to Pennsylvania in terms of agritourism, apple cultivation, and recent growth in cider production. On the main page of The Commonwealth of Virginia’s (2019) website was a section, “Wineries, breweries, distilleries and cideries.” This page proudly promoted that Virginia was the first state to have an official “Cider Week,” proclaimed by the governor in 2012. The page stated that Virginia is the sixth-largest apple producer in the country by acreage, that cider is part of the state’s cultural heritage, and that the cider scene has recently exploded. The page had a sub-heading called “What is Cider” and briefly described its historic importance and how the product is made.

Conclusions

Despite having a long, important role in United States history and acting as an essential dietary staple for early settlers, cider has had little recognition for the past hundred years. Recently, cider has experienced a resurgence. Orchards within close proximity to major population centers and with abundant scenic, rural areas, may provide opportunities for agritourism. However, slight adjustments to marketing could potentially have significant impacts on the cider industry.

Quantitative results on how tourism agencies promoted cider within Pennsylvania and other top cider producing states can provide a structure for those in travel tourism and cider production to begin discussions. Food and drink tourism is clearly important, from small towns, to counties, to large regions and states. Most states mentioned local beverages and proudly promoted their artisan beverages. This study provided an example of how cider was promoted at different scales. Nearly 50 percent of Pennsylvania’s 53 official city, country, region, or state tourism promotional agencies promoted local beverages on their main webpage, 75 percent of them had a subsection or page devoted to encouraging visitors to drink at local establishments,

and a third of agencies had an organized promotional drink trail. Although cider was included in many of these promotions, it was presented and advertised in an inconsistent framework.

The ability to attract out-of-state and international tourists to consume cider would be advantageous for Pennsylvania and other cider producing state economies, and the inconsistencies of how cider is presented may be confusing for tourists. Virginia and Oregon provided clear descriptions on their states' webpages of what cider is, the importance of the beverage to their heritage, agriculture, and economy, places to sample it, and suggestions of what other activities can be enjoyed nearby. If other states promoted cider with family-friendly activities in rural communities, particularly those on idyllic farms with u-pick events, hayrides, or corn mazes, it is possible that increased cider consumption could impact additional agritourism activities and businesses; hotels, shops, parks, and restaurants, many rural communities could also experience economic growth.

Additionally, consistent definitions of cider at the state level may help bring clarity between federal and neighboring states' definitions. It would provide a framework for cities, counties, and regional tourism agencies to promote their local businesses. Consistency on how cider is promoted between promotional agencies would allow tourists to find similar venues in different locations. Simply improving communication between local, state, and federal agencies, as well as local businesses could have profound impacts on cider sales and increased economic opportunities for rural communities wanting to increase agritourism.

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