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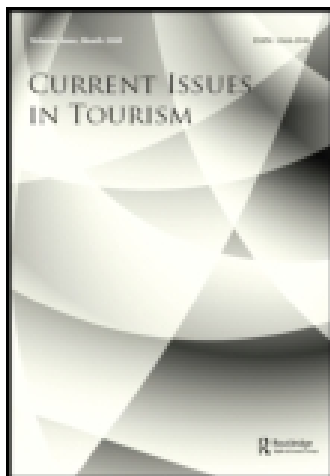
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### Educating winery visitors and consumers: an international perspective

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## Educating winery visitors and consumers: an international perspective

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In times of economic uncertainty, fluctuating currency exchange, increasing wine production and competition from new or established wine-producing regions, wineries must overcome many obstacles to produce, market and ultimately benefit from wine production. Educating winery visitors and other potential consumers is one among different key strategies wineries' management could undertake to build relationships, brand loyalty, and maximise any opportunities to obtaining benefits, including from wine tourism. In gathering data from wineries located predominantly in Italy and Spain, the study provides an international perspective on wineries' educational initiatives. Guided tours, product tastings and showcasing production processes are the most common approaches to educating their visitors and wine consumers. In spite of these initiatives, winery entrepreneurs categorise their educational efforts as modest, suggesting that these are not being fully exploited or maximised. In addition, few of the comments emphasise the importance of educational experiences with regard to the region or local tourism. Given the important role wineries have as product and service providers in many rural areas and tourist destinations, the study's findings have several important implications for winery entrepreneurship and for wine tourism.

**Keywords:** wine; wineries; wine tourism; education; initiatives; social learning theory; visitors

### Introduction

As more wine regions develop and the wine sector further improves production concepts and strategies, or increases volume, quality, and recognition, the links between the wine and tourism products are becoming stronger. The cases of Napa and Sonoma Valley in California, Hunter Valley and Margaret River in Australia, or Tuscany in Italy, to name a few, illustrate the importance for entire wine sectors to expand from simply growing grapes and selling wines to providing experiences to visitors. Carew and Florkowski (2012) discuss the developments taking place in British Columbia (BC), Canada, where the expanding local wine sector is linked to investments in tourism, golf courses, hotels, and restaurants. However, despite the enormous potential for wine regions to benefit from developing tourism for different segments of consumers keen to explore less known destinations,

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unique wines or culinary offerings, in much of the world, the wine sector is facing serious challenges.

The threat of competition from various wine markets, with different levels of quality and price on offer, has also led to reactive measures from some wine regions. For instance, excess wine production, saturated domestic demand, and a crisis in competitiveness have forced many Spanish wineries to redouble their exporting efforts (Bardají & Mili, 2009; Fernández Olmos, 2011; Martínez-Carrión & Medina-Albadalejo, 2010), or consider wine tourism as an additional source of sales (Clemente-Ricolfi, Escribá-Pérez, Rodríguez-Barrio, & Buitrago Vera, 2012). In the case of BC wineries, winery entrepreneurs have experimented or shifted production, growing other grape varieties (Carew & Florkowski, 2012). Increasing knowledge among BC consumers, especially concerning wine price and quality has been a key factor. Indeed, Carew and Florkowski (2012) explain that consumer education, together with more disposable income, and the resulting affordability of high-end products, have contributed to increasing sales of local premium quality wines. While clearly consumer education may not be the only solution to current challenges in wine marketing, Carew and Florkowski's (2012) study demonstrates that this element can, however, play a pivotal role.

Previous research (Ali-Knight & Charters, 1999; Charters & Ali-Knight, 2002; Hall & Mitchell, 2008; Hall, Sharples, Cambourne, & Macionis, 2000; Mitchell & Hall, 2006) emphasises the importance of the winery visit as an opportunity for educational experiences. The literature also identifies winery visitors' interest in taking part in educational experiences (Jaffe & Pasternak, 2004). Despite its significance, academic wine tourism studies focusing primarily on the educational efforts of wineries towards their visitors and consumers remain limited. In most cases, studies were conducted nearly a decade ago, with almost no recent publications following such constant developments occurring in the wine and wine consumer sectors as wineries' new strategies, new consumer trends, or contemporary consumers' educational demands. In addition, for the most part, previous studies examine one region or country, with little or no scope to make comparisons with other groups of winery entrepreneurs. This study makes a contribution in the latter aspect, investigating the educational efforts of wineries from an international perspective, with the participation of wineries from Italy, Spain, and New World countries. The following research questions (RQs) will be addressed:

RQ1: To what extent do winery entrepreneurs consider educational initiatives among their visitors—consumers?

RQ2: In what specific ways are wineries involved in educational initiatives among their visitors—consumers?

Gathering updated information about wineries' educational initiatives from an international perspective could be invaluable for such stakeholders of the wine and wine tourism sectors as winery, hospitality, tourism businesses, and rural development organisations. With current economic downturns affecting consumers' purchasing decisions, challenges in some wine regions and countries due to increasing competition, or with issues of perceived quality and trends, educating consumers could be one of a number of potentially efficient strategies for the wine sector to build upon. Education could lead to establishing and strengthening relationships with new and existing wine consumers, to promoting the wine region, the local cuisine, and to other forms of culture and leisure. In addressing the above RQs, the study could contribute to creating more awareness about the benefits and significance that educational initiatives could generate for wineries and their sector.

In the following section, social learning theory (SLT) is used as a conceptual tool to examine and understand consumer learning. SLT will also serve as a linking element to the aspects of consumption, and tourism consumption. The ensuing methodology will introduce the sampling and data gathering procedure, followed by the presentation of the study's findings. The conclusions section will then summarise the study, its findings, discuss their implications, and will propose areas for future examination.

### **Literature review: SLT, consumer and visitor education**

For several decades, SLT (Bandura, 1977) has been proposed and considered by many researchers; this theory is based on several philosophical foundations. For example, according to Bandura (1977), 'Anticipatory capacities enable humans to be motivated by prospective consequences' (p. 18); in addition, past experiences can raise people's expectations that actions will lead to some form of benefit. Thus, anticipation and previous experiences can have a substantial impact on people's expectations. Moreover, raised expectations can serve as stimulators to those individuals engaged in some form of consumption, including product and service consumption. Indeed, SLT posits 'that environment [sic] influences learner behaviour by providing both discriminative stimuli and reinforcement' (Parcel et al., 1987, p. 154). Further, SLT emphasises such personal cognitions as expectations, self-control, self-efficacy (i.e. confidence), and behavioural capability (Bandura, 1986; Parcel & Baranowski, 1981; Parcel et al., 1987). Under the STL umbrella, self-efficacy can be conceptualised as originating from different sources of information, and conveyed by mediated or direct experience (Bandura, 1977).

Thus, in the context of the winery experience, self-efficacy may develop among winery visitors from exchanging and acquiring information from the winery personnel or management. These exchanges then lead to new and additional knowledge, subsequently increasing visitors' confidence about the wine product, about making suggestions for food and wine pairings, as well as for making more informed purchasing decisions. Indeed, Bishop and Barber's (2012) recent study reports that people with higher levels of self-efficacy are more reliant on themselves for acquiring information. Considering this finding in association with winery experiences, it could be argued that people with higher levels of self-efficacy would take the initiative to travel to the winery and become more involved in information exchanges. In contrast, Bishop and Barber (2012) explain that individuals with lower levels of self-efficacy are more reliant upon 'impersonal sources of information, such as the media or internet' (p. 13). In addition, the authors observe that individuals with apparent higher self-esteem rely more on themselves as well as on impersonal sources to find information, as compared to individuals exhibiting lower levels of self-esteem.

Further, SLT is based on the premise that people can learn through different means, including their own 'lived' experiences, as well as from observing the actions of other individuals (Bandura, 1977). Through observation of other individuals' actions, one can also learn emotional reactions, attitudes, and behaviours (McGregor, 2009). Further, through observation, people form their own idea of how to perform new behaviours; subsequently, 'this coded information serves as a guide for action' (Bandura, 1977, p. 22). In the context of SLT, observation is also referred to as 'modelling' (Bandura, 1977); modelling influences can produce learning mainly through their informative function (Bandura, 1977). By being exposed to learning environments, observers will essentially acquire a symbolic representation of the modelled activity that will serve as a guide for appropriate performance (Bandura, 1977). These simplified theoretical notions can also be applicable to the area of consumer behaviour.

For instance, McGregor (2009) suggests that, if consumers copy or emulate behaviour, then arguably they are also involved in the learning process. McGregor (2009) further mentions the usefulness of SLT in the field of consumer behaviour, referring to Lee, Conroy, and Hii (2003) where they discuss the process of individuals in acquiring consumer skills, including participatory learning through discovery. This aspect can also have direct and indirect links to tourism and wine tourism consumption. In the field of (heritage) tourism, Moscardo (1996) underlines the impact that one form of educational activity – ‘interpretation’ – can have on tourists and their experiences. Interpretation essentially seeks to reveal relationships and meanings, and links the place or topic to aspects related to the experience or personality of visitors (Tilden, 1977). Interpretation can contribute to increasing visitors’ awareness about the significance of the host culture and region. Interpretation can also contribute to implications of visitors’ actions, encouraging sustainable behaviour, while at the same time enhancing their tourism experience (Moscardo, 1996). Other contemporary tourism studies have acknowledged the importance of interpretation in the context of educating visitors, as well as in instilling a culture of sustainable tourism behaviour (Beckmann, 1988; Forestell, 1990; Moscardo, Woods, & Saltzer, 2004; Orams, 1996; Reisinger & Steiner, 2006).

In the field of wine tourism, Dodd (1995) identified the importance of educational experiences at the winery’s cellar door, especially in creating knowledge and awareness among visitors. Experiential activities at the winery represent value and are thought to enhance consumer perceptions of their cellar door experiences. For example, Ho and Gallagher (2005) refer to the spill-over from word-of-mouth among wine consumers, noting that recommendations from others are a very powerful tool contributing to wine purchases. These authors refer to the importance of ‘social factors’, such as tasting wines in a group of family or friends. Moreover, Ho and Gallagher (2005) noticed that groups composed of more than three individuals tended to make more purchases than did smaller visitor groups, or individual visitors.

Further, Dodd (1995) concludes that educational initiatives can increase visitors’ wine consumption within the wine region. Barber, Donovan, and Dodd (2008) mention (winery) on-site motivators, or such experiential elements as wine education, wine pairing or culinary arts, and off-site motivators, especially through the development of wine festivals in collaboration with other wineries or building partnerships and alliance marketing. Ravenscroft and van Westering (2001) refer to tourism and leisure practices as means to ‘learning through experience’, whereby visitors can become more knowledgeable about wines, particularly through consumption, which is also associated with production processes. Carmichael (2005) also emphasises the links between consumption and production processes, in that winery visitors are ‘highly involved in the production of the experience’ (p. 201), not only tasting wines but also appreciating the rural setting, or rural livelihoods. Taylor, Dodd, and Barber (2008) report on the outcomes of wine education courses, noticing expected as well as less expected reactions by participants. For instance, while participants acknowledged increased knowledge after completing the course, their preferences for particular wines partly changed, with males’ preference for red wines significantly increasing compared to their female counterparts. In addition, overall, participants’ preference for wines evaluated during the course decreased (Taylor et al., 2008), suggesting a change in behaviour following the educational experience.

Further, Ali-Knight and Charters (1999) identified a strong relationship between education and the concept of added value. These authors conceptualised that, consumers’ perceptions of wine price were more favourable where there was an educational outcome associated with their wine purchases. Ali-Knight and Charters (1999) argued that little is

known as to whether there is or not a demand for education at the winery. Subsequently, Charters and Ali-Knight (2002) found that winery visitors value the educational component, especially in helping minimise the intimidating ‘snobbery’ factor. Figure 1 conceptualises the different links and threads concerning SLT, consumer education, tourism, and wine tourism as discussed by different authors, and as presented in this section.

In the hospitality sector, educating consumers on wines appears to be based more on product knowledge than on wine service or staff training (Dewald, 2008). However, in some environments, sommeliers can substantially contribute to patrons’ education, for instance, in identifying high end products (Dewald, 2008). While a potentially satisfying business outcome for restaurateurs, high end products may also mean price increases to consumers. Thus, despite the educational value of learning about other wines and their characteristics, from the perspective of some consumer segments, the higher price paid may not equate to more satisfying wine educational experiences. Instead, such experiences may further contribute to the ‘perpetuation’ of wine snobbery.

In addition, such products may not necessarily be local, also leading to misunderstandings, misconceptions, or ‘product discrimination’. Recent research (Alonso, 2011a) discusses the difficulties wineries producing muscadine wines are encountering in finding ‘acceptance’ among hospitality businesses and their patrons. Moreover, Alonso’s (2011a) study found that winery entrepreneurs perceived a lack of appreciation for local muscadine wines among the region’s restaurateurs. Alonso (2011a) also refers to Gultek, Dodd, and Guydosh (2005), whose study underlines the problem that may ensue due to restaurateurs’ resistance or negative perceptions of local wines. Resistance is arguably related to restaurateurs’ lack of knowledge and appreciation of local products. Attitudes of this kind may

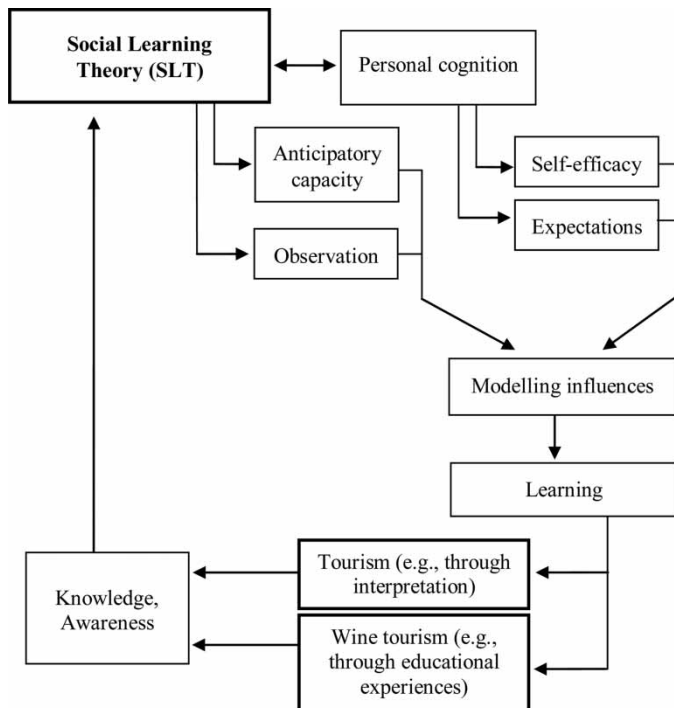


Figure 1. Conceptualising SLT in the context of tourism and wine tourism.



also have a negative impact on restaurateurs' educational efforts towards restaurant patrons and tourists. Indeed, negative perceptions may lead to lack of product availability for tourists and other consumers to experience, to weakening winery-hospitality industry relationships (Alonso, 2011a), and forgone opportunities to promote and market the region's products.

To date various studies have referred to the importance of education for wine tourism development and potential success. However, research investigating such initiatives from an international perspective is relatively limited, and, as previously suggested, mainly focuses on a single wine region or country. In addition, studies on winery visitor educational efforts have been conducted sporadically or very far in between, leading to a dearth of updated information in a very rapidly changing wine and wine tourism environment. The present study will address these apparent research gaps by gathering the perspectives of winery owners and managers operating in both New and Old World wineries.

### Methodology

The study was part of a large examination of winery management strategies, including exports, wineries' involvement in social media, involvement in wine tourism, and contemporary challenges wineries faced. Fundamentally, this study's objective was to investigate the following central themes:

(a) The extent to which wineries are involved in initiatives to educate their consumers and visitors, and (b) specific ways in which they are educating consumers and visitors.

To address the various areas of examination, a number of wine and wine tourism studies were consulted (Ali-Knight & Charters, 1999; Alonso, 2011b; O'Neill & Palmer, 2004; O'Neill, Palmer, & Charters, 2002; Wickramasekera & Bamberly, 2003; Wickramasekera & Oczkowski, 2004) to design an online questionnaire. While there are arguably limitations in gathering data via online questionnaires, this medium was considered the most convenient in view of existing travel, budget, geographic, distance, human resources, and other limitations faced to reach respondents in various countries. Johnson (2001) has acknowledged that, despite translation or language barriers, the Internet can assist in reaching respondents in distant locations internationally. The online questionnaire was separated in various sections to examine the areas mentioned above, as well as to gather demographic information about wineries and respondents. Overall, the study gathered quantitative data, for instance, via Likert-type scales, or through lists of answer choices respondents could choose from. However, in most questions, and below the Likert-type scales, space was provided for respondents to type comments, thus, providing a qualitative component to the study.

Numerous websites of (wine) designations of origin (DOs), regulatory councils, and winery associations were identified through Internet searches in 10 different countries (Table 1). This search was conducted based on convenience, and, for the most part, on the availability of winery information. For example, a database was developed containing Northern and Southern Hemisphere wineries identified through existing and updated web sites of winery associations, DOs, or containing group information of wine regions. The more straightforward identification of wineries in view of time and budget limitations was, therefore, the main reason for country and region selection. In the case of US wineries, for instance, and as opposed to DOs and winery associations identified in other countries, for the most part listings of wineries that provided (email) contact details for multiple wineries were not available. In multiple cases, winery websites were inactive, an issue also identified when gathering contact information from other selected countries. In addition, as most

Table 1. Selected characteristics from the participating countries.

Old World	Production (in litres) <sup>a</sup>	Wineries contacted	Useable responses	%	Selected responses	%
Italy (IT)	4.58 billion	3300	240	7.3	214	6.5
Spain (S)	3.61 billion	1700	136	8.0	124	7.3
Totals		5000	376	7.5	338	6.8
New World (NW)	Production (in litres) <sup>a</sup>	Contacted	Useable responses	%	Selected responses	%
Australia	1.07 billion	642	30	4.7	17	2.6
New Zealand	190 million	490	29	5.9	26	5.3
USA	2.65 billion	459	18	3.9	18	3.9
Canada	56 million	186	17	9.1	17	9.1
Argentina	1.63 billion	148	12	8.1	10	6.8
South Africa	922 million	147	7	4.8	5	3.4
Uruguay	112 million	60	11	18.3	11	18.3
Chile	884 million	60	8	13.3	5	8.3
Totals		2192	132	6.0	109	5.0
Overall totals		7192	508	7.1	447	6.2

Source: Wine Institute (2011).

<sup>a</sup>Figures are from 2010.

states in the USA have wineries, there was a need to search for states separately in order to gather information about their wineries. These issues considerably slowed the process of identifying US wineries. Hence, a decision was made to restrict the chosen sample to 459, although it is acknowledged that the existing number of US wineries is much higher, with over 3000 in California alone (Wine Institute, 2012). Overall, the different web site searches enabled the compilation of a list of 7192 email addresses.

To ensure that respondents from different countries understood and were able to complete the questionnaire, it was decided to use three different translations. English was used for Australian, Canadian, New Zealand, South African, and US wineries; Italian for Italian wineries and Spanish for wineries located in Argentina, Chile, Spain, and Uruguay. Members of the research team, who are fluent in those three languages, translated the questionnaire content from English to Italian and to Spanish. The same researchers also translated responses back into English once the data were gathered. Wineries from both Northern and Southern Hemispheres were contacted between February and July of 2011. The researchers were mindful of potentially demanding times of the year for growers (harvesting, pruning); consequently, the electronic correspondence (emails) and reminders were sent at times or season when such critical duties were not taking place.

The messages sent in small batches to the wineries contained a summary of the objectives of the study, and formally invited managers and owners to take part in the study by completing the online questionnaire. A URL link directing respondents to complete the online questionnaire was provided in the body of the message. A reminder message and a final 'thank you' note were sent at approximately 10-day intervals. Combined, these efforts allowed for gathering 508 usable responses. Of these, 447 respondents indicated their involvement with educational initiatives; this sub-set was then considered for this study (Table 1). The low percentage of responses, while not surprising according to previous research (Churchill & Iacobucci, 2009), especially concerning low responses through online questionnaires (Sax, Gilmartin, & Bryant, 2003), is recognised as a fundamental limitation in this study. This study further illustrates the difficulty of eliciting

Table 2. Demographic characteristics of wineries and respondents.

Characteristics	Italy		Spain		New World		Total	
	<i>n</i>	%	<i>n</i>	%	<i>n</i>	%	<i>n</i>	%
<i>Time since the winery has been established</i>								
15 years or less	58	27.1	65	52.4	72	66.1	195	43.6
Between 16 and 35 years	53	24.8	27	21.8	24	22.0	104	23.3
36+ years	100	46.7	30	24.2	12	11.0	142	31.8
Missing	1	1.4	2	1.5	1	0.9	6	1.3
<i>Role(s) of respondents</i>								
Only one role (e.g. owner only)	143	66.8	54	43.5	56	51.4	253	56.6
More than one role (e.g. owner and winemaker)	71	33.2	68	54.8	51	46.8	190	42.5
Missing	0	0.0	2	1.6	2	1.8	4	0.9
<i>Production of the winery (bottles)</i>								
19,999 and below	27	12.6	24	19.4	42	38.5	93	20.8
Between 20,000 and 99,999	108	50.5	46	37.1	28	25.7	182	40.7
100,000+	78	36.4	52	41.9	39	35.8	169	37.8
Missing	1	0.5	2	1.6	0	0.0	3	0.7
<i>Number of fulltime employees</i>								
5 or fewer	151	70.6	80	64.5	72	66.1	303	67.8
Between 6 and 19	54	25.2	36	29.0	20	18.3	110	24.6
20+	9	4.2	7	5.6	17	115.6	33	7.4
Missing	0	0.0	1	0.8	0	0.0	1	0.2
<i>Involvement in wine exports</i>								
Yes	200	93.5	103	83.1	68	62.4	371	83.0
No	14	6.5	19	15.3	39	35.8	72	16.1
Missing	0	0.0	2	1.6	2	1.8	4	0.9
<i>Involvement in wine tourism</i>								
Less than 1 year	5	2.3	19	15.3	14	12.8	38	8.5
Between 1 and 3 years	38	17.8	29	23.4	33	30.3	100	22.4
Four or more years	149	68.6	54	43.5	46	42.2	249	55.7
Totals	192	89.7	102	82.2	93	85.3	387	86.6
Currently not involved	27	10.3	22	17.7	16	14.7	60	13.4

Table 3. Different forms of involvement by wineries with wine tourism.<sup>a</sup>

Forms of involvement <sup>b</sup>	Italy		Spain		New World		Totals <sup>c</sup>	
	<i>n</i>	%	<i>n</i>	%	<i>n</i>	%	<i>n</i>	%
A tasting room is available at the winery	134	69.8	48	47.1	65	69.9	247	63.8
Educational guided tours are offered at the winery, either in groups or individually	146	76.0	61	59.8	39	41.9	246	63.6
The winery's management intends to increase the involvement of the winery with wine tourism	96	50.0	46	45.1	35	37.6	177	45.7
Events (e.g. weddings, receptions) are organised at the winery's facilities	48	25.0	27	26.5	25	26.9	100	25.8
Food is sold at the winery (for instance, at the winery restaurant)	27	14.1	23	22.5	20	21.5	70	18.1

<sup>a</sup>Using a sub-set of 387 respondents (only those wineries involved in wine tourism; Italy: 192, Spain: 102, New World: 93).

<sup>b</sup>Respondents could choose more than one item.

<sup>c</sup>Percentages are calculated from 387 respondents.

responses from wineries that may receive multiple invitations to participate in different studies, especially since the rapid development of email and other technologies. Again, given the various limitations faced to travel to each country and potentially gather data by other means, a decision was made in favour of the online questionnaire.

Another limitation is the lack of a sufficiently large number of responses among New World wine countries (Table 1) to make potentially useful comparisons. While potentially not generalisable, the data gathered from the useable responses could be insightful and valuable for individual wineries, the wine sector, or other rural sectors in their quest to market their products and services, as well as to develop food and wine tourism. In addition, the findings are considered useful for future research efforts, exploring educational initiatives, or related themes, in the wine sector.

The numerical data were managed using Microsoft Excel, and then exported into the Statistical Package for the Social Sciences (SPSS, version 20) to run statistical tests and potentially identify differences. For example, Pearson's Chi-square ( $\chi^2$ ) and Cramer's  $V$ , independent samples  $t$ -test, and one-way ANOVA (Scheffé post hoc) were considered. The qualitative data, on the other hand, were managed using Microsoft Excel and Word; this managing process was then continued using the NVivo software (version 9). Subsequently, in line with earlier research (Krippendorff, 2004; Pan, MacLaurin, & Crotts, 2007), content analysis was used in the process of separating responses and comments into themes, and reducing these into more manageable parts (Weber, 1990). This process was complemented by word association (Benthin et al., 1995; Roininen, Arvola, & Lähteenmäki, 2006) to extract keywords stemming from respondents comments (Table 4). The verbatim comments provided in the following section are labelled as per the following examples: Respondent 1, Italy, is labelled as 'R1, Italy', Respondent 2, Spain, as 'R2, Spain' and so forth.

### ***Demographic characteristics of wineries and respondents***

The figures in Table 2 indicate that the bulk of the participating wineries, and in this group Spanish and New World wineries, have been established in the last two decades; in contrast, nearly half of the Italian group has been operating for longer than three decades. Clear differences were identified in the number of roles (e.g. owner, manager, viticulturalist, and wine maker) respondents perform at the winery. The majority of Spanish respondents indicated performing more than role, New World respondents almost equally one and several roles, with the majority of Italian respondents predominantly performing one role only.

The largest group of respondents (61.5%) indicated that their winery produces fewer than 100,000 bottles of wine, and as much as 92.4% of the wineries employ fewer than 20 full-time employees. Combined, this information demonstrates that most participating wineries are small and micro in size. Of all three groups, Italian wineries (93.5%) are most exporting oriented, followed by Spanish. Similar percentages of these three groups are not involved in wine tourism. However, Italian wineries appear to be the respondent group involved for the longest time as compared to Spanish and New World.

## **Findings**

### ***Extent of wineries' educational involvement***

Respondents were asked to indicate the extent to which they educate their consumers and winery visitors, as well as other 'customers', such as restaurateurs and hotel entrepreneurs.

Table 4. Ways of educating winery visitors and consumers.<sup>a</sup>

	<i>n</i>	%
<i>Ways of educating (first)</i>		
Explain (e.g. the winery's wines)	112	40.3
Through wine tastings	59	21.2
Visit to the vineyard-winery	44	15.8
Through events at the winery	8	2.9
Through wine courses	7	2.5
Through presentations	6	2.2
<i>Ways of educating (second)</i>		
Through wine tastings	51	18.3
Explain (e.g. the winery's wines)	26	9.4
Emphasising the food-wine 'marriage' (pairing)	24	8.6
Emphasising the production-elaboration process	18	6.5
Emphasising the local territory, region, wine culture	17	6.1
Visit to vineyard-winery	14	5.0
Using the Internet to educate (website)	6	2.2
<i>Ways of educating (third)</i>		
Emphasising the food-wine 'marriage' (pairing)	25	9.0
Through wine tastings	20	7.2
Emphasising the local territory, region, wine culture	15	5.4
Visit to vineyard-winery	9	3.2
Explain (e.g. the winery's wines)	5	1.8
Through events at the winery	4	1.4
<i>Ways of educating (fourth)</i>		
Opportunity to answer visitors' questions	10	3.6
Involving visitors (e.g. harvesting, stumping grapes, night walks)	6	2.2
Emphasising the food-wine 'marriage' (pairing)	4	1.4

<sup>a</sup>One hundred and ninety-nine respondents indicated more than one way; these ways are not repeated by the same respondents in subsequent sections of the table.

A Likert-type scale was provided, with the following choices: (1) not at all, (2) to a limited extent, (3) moderately (neither extensively nor to a limited extent), (4) extensively, and (5) very extensively. The overall mean (2.99) indicates moderate educational efforts among respondents, suggesting that such efforts are to a great extent insufficient. In a similar note, in a study conducted in Cyprus's wine industry Vrontis, Thrassou, and Czinkota (2011) noticed that wine education and consumers' seemingly low image of local wines were areas needing major improvements.

New World respondents (mean = 3.13) appeared to be more active in educating visitors, though very slightly, compared with Spanish (mean = 2.96), and Italian (2.93). Not surprisingly, running one-way ANOVA (Scheffé) resulted in no statistically significant differences identified among these three groups. In contrast, a statistically significant difference was noticed ( $F(3,443) = 11.69, p = 0.001$ ) when comparing wineries' extent of educational efforts (dependent variable, DV), and time since they had been involved in wine tourism (independent variable, IV). Those involved in wine tourism for four or more years indicated higher educational involvement (mean = 3.21), if only marginally, than those involved between 1 and 3 years (mean = 2.88), and than those involved for less than 1 year (mean = 2.95).

Though expected, another statistically significant difference was identified, using independent samples *t*-test, in this case to compare the wineries' extent of educational efforts and whether or not they are involved in wine tourism. Wineries involved in wine

tourism (mean = 3.10) felt stronger about their educational efforts than those not involved in wine tourism (mean = 2.27) ( $p < 0.001$ ).

Table 3 demonstrates that educational activities via guided tours are among the most common forms of wineries' involvement in wine tourism, especially for Italian wineries. The tasting room is arguably the point where many educational opportunities materialise (Ali-Knight & Charters, 1999; Alonso, Sheridan, & Scherrer, 2008; Dodd & Bigotte, 1997; Hall et al., 2000; O'Neill et al., 2002), and where significantly, educational feedback is transmitted to visitors. In addition to facilitating learning through observations, there are also tangible elements associated with the winery experience. Given many wineries' limitations to host events or sell food, these two forms of wine tourism involvement may be less frequent; however, potentially they may be of much educational importance to visitors and wineries.

### *Wineries' approaches to educating visitors and consumers*

Respondents were also asked to describe their approach to facilitating educational activities among their winery visitors and consumers. The majority of participants (278, 62.2%) provided their comments in this section. From these respondents, 24 indicated not being currently involved in wine tourism. However, comments from members of this last group suggest that, while not formally involved in wine tourism, wineries do engage in educational activities in various ways:

R1, Italy: 'We organise tastings of our wines at our clients' place'.

R2, Uruguay: 'Sometimes we receive school groups; we show them the vineyards and the winery, and inform them about the wine-making process'.

R3, New Zealand: 'From our back label information and the blurb we give other tourist outlets for our wine ... We educate our "wwoofers" [sic]'.

R4, New Zealand: 'Have customers visit the winery. Host specific groups – incentive style travel for high performing distributors'.

In fact, further analysis revealed that 18 of the 24 wineries are infrequently organising vineyard-winery tours, tastings both at the winery and outside, short presentations, hiring sommeliers to conduct presentations, and specialised presentations for clients (importers, distributors). Thus, overall it could be posited that being open to the public, and more specifically, being involved in wine tourism are intrinsically related to wineries' educational activities.

In using word association (Benthin et al., 1995; Roininen et al., 2006), it was found that apart from the 278 who provided at least one way, a further 199 provided two ways, 101 three ways, and 37 four ways. Table 4 illustrates the predominant ways in which respondents educate their consumers and visitors, with explaining different aspects of the wineries' products being clearly the most important educational component. In fact, even when this item was not mentioned or suggested the first time, it was referred to subsequently in many of the respondents' comments, including the following:

R5, Argentina: 'I explain visitors about the process; I have them taste the wines stored in the vats from the last harvest; I invite them to participate in our next harvest ...'

R6, Spain: 'We have information brochures in various languages about the region's wineries ... we make suggestions ... we try to create memorable experiences ... the next wine we are releasing is the wine tourists have stomped with their own feet ...'

R7, New Zealand: 'Explaining any or all of our operations in the vineyard and winery, describing our wines and winemaking and answering questions'.



While arguably educating visitors and consumers is part of wineries' objective to market their wine products, it can also be used as a tool to raise awareness: R8, Argentina: 'We are interested in educating consumers, not only to see this [education] reflected in the increase of our sales, but also in order that consumers-tourists can truly gain deeper knowledge of this type of industry'. Thus, while earlier research (Ali-Knight & Charters, 1999) found that wineries' education initiatives focus 'on what is actually in the glass at the cellar door' (p. 16), the comment above suggests that some entrepreneurs are prepared to invest time, energy and resources in an effort to broaden knowledge and awareness. More recently, Famularo, Bruwer, and Li's (2010) findings confirmed that more wine knowledge and involvement can contribute to more understanding of wines' region of origin, thus impacting positively on consumers' wine decision-making process. In turn, increased knowledge about the region of origin can have several implications for winery visitation and for wine tourism in the region. Moreover, visitation to a cellar door, coupled with interest in learning about wines, and visitors' interaction with the 'winescape' of the region can contribute to 'a powerful recall choice factor' (Famularo et al., 2010, p. 363).

Despite the usefulness of educational efforts, there was a perception that education initiatives could negatively affect the overall winery experience (R9, Spain): 'We educate little because visitors come here to enjoy, and we prefer not to overwhelm them with too many details and "lessons" ... it is more a friendly chat and trying a wine'. In other cases, there were negative views concerning visitors' absorption or interest in learning about the winery and its products:

R10, Italy: 'There is little interest [among visitors] to increase their information "baggage" ...

R, Italy: "there is very little wine culture [among visitors]"'.

R11, Spain: 'We usually organise tastings and food pairings, but the visiting public lacks [wine] "professional" knowledge'.

The issue raised in the last comment also became evident with regard to the relationship between the winery and hospitality businesses (R12, Italy): 'Educating our clients, especially restaurateurs, is difficult, because they think they already know everything ... Most of the time, what they are most interested in is only their economic returns'. Different comments also made reference to wineries' educational efforts and how these were extended to seek alliances and associations with hospitality businesses, locally and internationally:

R13, USA: 'We do training of restaurant staff on our wines and their relationship with food [sic]'.

R14, Uruguay: '[We organise] Tastings at specific locations (hotels, restaurants)'.

R15, New Zealand: 'We focus our efforts with the gatekeepers within the trade, specifically domestic and international wine buyers, wine media, sommeliers, restaurant owners, hotels, off trade and on trade, our distributors, conducting educational visits, and training sessions'.

R16, Italy: 'Private promotional dinners with restaurants and [hospitality] sector's representatives'.

R17, Italy: 'We organise tastings and courses to bring wine closer to our visitors ... we visit our overseas clients, and organise events to involve their local consumers as well'.

In turn, these developments also represent business opportunities for wineries. For instance, hotels can organise wine events, including educational activities and wine tastings (Jaffe & Pasternak, 2004) where the wine product can be a promotional tool for both the winery and the wine region.

While fundamentally explaining, providing on-site tastings, and organising vineyard and winery tours were three key educational aspects, these did not seem to extend to actively promoting the local region, and indirectly wine tourism. In line with previous research (Getz, 2000; Getz & Brown, 2006; Hall et al., 2000; Macionis & Cambourne, 1998), one respondent mentioned (R18, Spain): 'Wine tourism is not only about visiting wineries, but also about the surrounding environment'. In fact, in the first part of their comments, only two respondents referred to such aspects as the local foods, the wine region, local traditions and culture as pillars of their educational activities: R19, Italy: 'Knowledge of the territory, food-wine pairings, local history, and culture'; R20, Italy: 'Knowledge of the territory, the [wine] product, and its elaboration'. As Table 4 indicates, as many as 17 referred to those aspects as a complementary part of their comments, and 15 as more marginal aspects. Interestingly, all of these comments were from Italian and Spanish participants, including the following:

R21, Spain: 'We want visitors to appreciate our region, still unknown for many in the world of wines, and that they [visitors] appreciate our region's products'.

R22, Italy: '90 percent of our visitors are from overseas; often they visit the region for the first time, and therefore have a desire and curiosity to know different aspects of our wine and food traditions'.

R23, Spain: 'We conduct "pedagogy" of wine; we see wine as a food, as culture, as a way of life in our community'.

R24, Italy: 'All that concerns the territory and food-wine pairings'.

R25, Italy: 'History, culture, territory, man's work, leading to a single philosophy of production'.

A current issue impacting different sectors is the growing use of social media, and its potential or actual impacts on tourism and other forms of consumption. In this study, five respondents referred to social media as a tool to educate visitors and consumers. With more wineries using such social media platforms as Facebook, twitter and others that might appear in the near future, this aspect can also bring potential visitors and consumers 'closer' to the destination where the winery is located, as well as to the winery region. In turn, these events will have clear implications for the further development of wine and other forms of rural tourism.

### **Conclusions, limitations, implications, and future research**

Increasing competition, sophistication, modernisation, consumer trends, and economic crises are increasing the complexity in which tourism, food, entertainment, and other leisure alternatives are offered, managed, and delivered. Such complexity is further magnified as a result of more demanding consumer segments searching for unique products, services, and experiences (Etgar, 2008), including with regard to wine products (Espejel & Fandos, 2009; Flint & Golcic, 2009). The wine sector is arguably an area where the impacts of competition, changing or new consumer choices, and perceived product quality have been serious and often negative. In addition, with many wineries involved in wine tourism, the service component is yet another element that requires special attention, increasing the level of complexity for wineries' management. Since pioneering academic wine tourism studies were conducted less than two decades ago (Beverland, 1998; Hall et al., 2000; Macionis & Cambourne, 1998), numerous authors have since referred to the cellar door, and to intrinsic aspects related to the winery experience, such as service, and educational experiences (Ali-Knight & Charters, 1999; Jaffe & Pasternak,



2004; O'Neill & Charters, 2000; O'Neill et al., 2002) as important factors contributing to wine tourism development.

While experiential aspects of wine tourism have drawn the attention of many researchers, winery entrepreneurs' educational initiatives have not been as widely researched. Further, when investigating the significance of wineries' educational initiatives, studies have mainly focussed on one wine region or country. This study takes an international approach to examine this area, predominantly gathering the views of Italian and Spanish winery entrepreneurs. Overall, respondents acknowledge a modest level of educational involvement. This limited involvement may also have implications for the further development of wine entrepreneurship and, importantly, wine tourism. Figure 2 conceptualises the overarching themes that emerged from respondents comments, and also identifies a gap in educational initiatives, leading to the implications.

Moreover, the link between SLT and the findings is made, especially in regard to SLT's usefulness – directly as well as indirectly – in facilitating understanding of the educational experience in the context of the winery experience. For example, several educational initiatives are related to fulfilling visitors' expectations, extending their learning from merely observing to active participants in on-site activities (stomping grapes, tastings, learning about food-wine pairings). Some of these educational activities may also contribute to self-efficacy, minimising fear, or the 'intimidation factor' that the wine product, or those presenting the wine product, intentionally or unintentionally spread in some winery and hospitality environments. Self-efficacy, expectations, observations, and anticipatory capacity may also have significant impacts for future visits, or in individuals' decision to discover or travel to other wine regions.

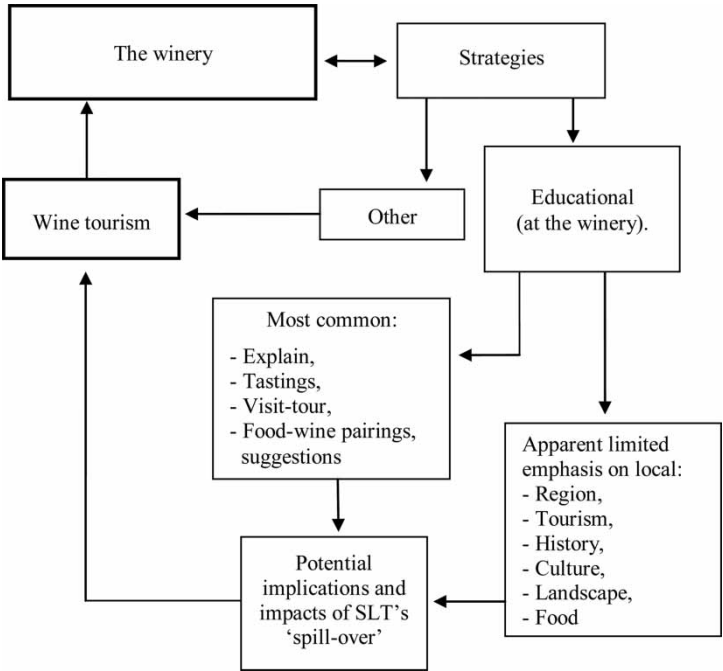


Figure 2. Conceptualising wineries' current educational initiatives.

In essence, the findings demonstrate that explaining to visitors and consumers the establishment's products, conducting tastings, vineyard, or winery tours, and discussing food and wine pairings are respondents' main educational activities. However, the local region, food, culture, tradition, history, or landscape appears to take a much more marginal role, with only few respondents clearly communicating that message to their visitors and consumers. As a result, many wineries, their sector, and region may not be adequately exploiting or maximising the region's potential.

At times when rural regions and other tourism destinations are eager to protect their assets, develop, and achieve tangible as well as intangible benefits from tourism, the role of different stakeholders in rural regions becomes essential. In this context, wineries play a key role in drawing visitors, as well as in serving as a link between the local wine product, hospitality, and consumers. Thus, wineries' role in tourism development cannot and should not be ignored. However, many winery entrepreneurs may be unaware of their important role, or may not have the resources or support to invest time and energy in educational activities that transcend the winery's cellar door or gate. As one comment underlined (R26, Italy): 'We travel to meet our clients, we present our wines, the territory where they are produced. More resources would be welcome. Ours is a family winery currently growing ...' Therefore, collaboration among different rural stakeholders (wineries, visitor centres, and hospitality and tourism enterprises) is vital in building bridges and strengthening the region's image. The additional presence of a local cuisine, other activities and tourist products in rural areas may also provide the foundation for 'bundling' and combining the different natural or industrial (wine production) elements and already existing leisure activities (sightseeing, hiking, etc.) to draw visitors and encourage their 'consumption of the region'.

Indeed, food experiences, food tastings, both key elements of food tourism (Hall & Mitchell, 2002) could also contribute to educational experiences, for instance, with consumers learning or experiencing different lifestyles and cultures (Young, Mincheol, Goh, & Antun, 2010). In this food context, local food markets could also play a key educational role. According to Hall, Mitchell, Scott, and Sharples (2008), these markets combine space and food that can bring 'the local culture into being' (p. 226), thus, constructing 'the local culture for consumption' (p. 226). Again, these different food experiences could be 'bundled' with winery visitation to create a more 'holistic' educational experience, and tourism product.

The findings of this study are not generalisable, either to the countries where the participating wineries are located, or to their wine sectors. The number of participants is too limited to allow such generalisations. However, the study does provide insights that could be of assistance and support to wine regions and their stakeholders, especially in their efforts to establish or further develop a culture of educating consumers. By increasing educational efforts, wine regions could make various gains, including better positioning their wine products, and, in cases where tourism might potentially blend with the wine region, raising the profile of the region as a wine tourism destination. For researchers, this study also provides a platform to encourage their engagement in investigations that include more than one region or country.

Among other themes, the aspect of adoption of social media by wineries, the extent to which wineries promote their region as part of their educational initiatives, or other emerging or innovative ways to educate visitors and consumers could be further explored in future studies. In doing so, and in gathering larger numbers of responses, studies could provide vital practical information to the wine sector and to tourism stakeholders, while further developing the theoretical foundation of wine tourism research. This foundation

includes the development of frameworks aimed at broadening understanding of wine entrepreneurship, wine tourism, and other forms of rural tourism, while keeping pace with the continuous developments occurring in these fields. Finally, the consumer perspective should also be emphasised in future research. With more demanding consumers and winery visitors, and with many available wine labels competing for their attention, research on educational needs among consumers could also identify valuable components that could be added to wineries' future marketing strategies.

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