Embracing opportunities at the nexus of wine and hospitality

Guest Editors: Bonnie Canziani and Natalia Velikova
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This special issue, “Embracing Opportunities at the Nexus of Wine and Hospitality,” of the International Journal of Wine Business Research highlights the intersection of wine and hospitality. The purpose of this issue was to advance and embrace the inherent possibilities emerging from scientific study of wine in the context of the hospitality industry. In a recent review of existing wine research (representing 22 wine business, hospitality and tourism journals and 739 refereed articles over a 26-year period from 1990 to 2015), Bonn et al. (2017) concluded:

Perhaps no other topic involving wine research is more overdue for focus than that of hospitality. Until this point, hospitality and wine research has been subjugated to topics related to wine menus, service training, and wine judging. The time has come where hospitality must begin to embrace opportunities associated with wine research and consumer behavior. Studies involving wine and food pairings, wine dinners, consumer spending patterns influenced by menu choices and menu design paired with wine suggestions, wine bars [...] should all be analyzed as future research topics (p. 29).

For the purpose of differentiating this special issue topic, we defined the concept of hospitality as spaces where onsite wine consumption was a greater consumer motivation than wine purchase for home or gift use. We also distinguished hospitality spaces from traditional winery tasting rooms (cellar door experiences). The focus was on restaurants, bars, hotels and other non-winery retail properties serving wine to consumers on the premises.

There are seven papers in this special issue. Several of these looked at aspects of wine distribution and consumption in restaurants. In a viewpoint paper by Velikova, Canziani and Williams, challenges and opportunities are described for wineries seeking to distribute their wine to restaurants, with a special focus on relationship building between smaller wineries and dining establishments. In addition to discussing factors critical to these relationships, the authors offered practical strategies to develop mutually beneficial partnerships while fulfilling the objectives and missions of both winery and restaurant.

In the article by Bruwer, Cohen and Kelley, the function of an individual’s level of wine involvement was explored in the context of group dining in the US market. This study has added an important sociological element to the existing wine business literature, as this is the first paper to deconstruct dining groups (dining parties) by looking at the level of wine involvement of individual party members. This paper suggests that a person’s wine involvement was associated with dining group composition, group dynamics and individual member role behaviors. The authors also developed wine-involvement diner profile descriptions that could be helpful for restaurants when creating strategies for selling wine. The implications are many for future research, as diners’ involvement with other menu items may also impact the success of food-wine pairings. Additionally, inter-group dynamics are a fertile arena for further exploration.

Up next is Brain’s study of wine training for restaurant staff in South Africa. The study was designed in part to verify the concrete business benefits of furnishing restaurant staff with greater formal wine knowledge and skills. Wine training for personnel selling wine seems to be a logical step for restaurants, as many restaurants cannot afford highly trained (and paid) sommeliers. Using a quasi-experimental research design, the author applied a wine training intervention and monitored wine sales over three sequential phases of the
study. Comparison of the control group versus the experimental group suggested that wine sales did increase when formal wine training was provided to staff. This work is of practical significance in that it underscores a continued need for the hospitality and the wine fields to join their efforts in getting restaurant staff equipped to deliver wine to the customer in a professional and meaningful way. As noted in the first viewpoint paper, wineries may want to support or subsidize wine training for restaurants they plan to partner with in selling their wine. Brain’s findings give them the impetus to do so.

Moving further into the consumer behavior realm, insights into the interplay among hospitality settings, consumer traits and wine attributes are offered in the next two papers, starting with a focused study by Capitello, Bazzani and Begalli investigating Italian rosé wine consumption in two out-of-home consumption environments. This research examined the effect of consumption context on individuals’ preference formation. By incorporating personality traits in the model, the authors explored how personality may affect wine consumption context choices. Three profiles of rosé wine drinkers are offered, and differences between consumers who prefer to drink rosé in different hospitality consumption situations are highlighted.

Similarly, the next paper by Duhan, Rinaldo, Velikova, Dodd and Trela also viewed wine consumption through the prism of various hospitality situations, but their approach was rooted in the people-product-situation framework. Three empirical studies described in the paper tested the theoretical propositions of the framework in the wine consumption context. Findings from this paper suggest that the level of consumers’ expertise with wine (experts versus novices) affects how sensitive they are to the perceived appropriateness of different wine closures in different consumption situations. Furthermore, the authors suggested and tested the robustness of the three-dimensional structure of wine hospitality situations – food, friends and formality.

In the final two papers, ground-breaking work was shared on consumer opinions of wine service in unique hospitality settings such as hotels and in the retail category of the German wine bar and shop. The paper by Hsieh, Lee and Yin concentrated on hotels in New York City, a prime lodging hotspot. The research team explored vital questions such as the importance of wine as an attractor for hotel guests by categorizing online consumer reviews captured from the TripAdvisor travel media site using wine-related content search keywords. They were able to discriminate among consumer reports of positive, negative and neutral hotel experiences, granting additional perspectives on how wine products and services impact the perceived quality of a hotel stay. Their findings and recommendations clearly strengthen the lodging sector’s use of wine as a means to enhance hotel guest experience and to generate additional revenue.

Looking at the German wine bar and shop sector, Dressler and Paunovic considered the integration of sales and service in this dual role retail/hospitality venue to test the theoretical notion of blurred division between product and service offerings. Their methodology extracted a set of complementary bar and shop designs with different mixes of product and services. This paper adds value in that it reinforces the role of augmented wine experiences to attract visitors to wine bar and shop locations, including the use of stimulating architectural design features. Two interesting avenues arise from their research. First, we need to take a closer look at the notion of hybrid designs in constructing outlets for the sale and consumption of wine beyond the winery tasting room. Second, in the right setting, the wine bar and shop can foster collaboration among wineries, wine experts, catering/food and entertainment industries, each bringing singular competencies to create expanded wine-related experiences.
To sum up, the call-for-papers for this special issue “Embracing Opportunities at the Nexus of Wine and Hospitality” proposed a three-pronged approach to the role of wine in the hospitality sector. It invited papers that would address wine from perspectives of the hospitality service operation, the hospitality consumer viewpoint or the wine product itself as it is offered or presented by the hospitality establishment. The contributing authors rose to this challenge; there is a solid mix of papers that explore these research foci.

We are confident that this special issue has led to greater insights into wine service and wine products in the hospitality sector. One such insight is that of strategic partnerships that can be developed between hospitality companies and wine purveyors, especially smaller wineries.

Training emerged as a critical success factor given evidence of increased revenues for restaurants employed trained wine servers. We have seen concepts in consumer behavior such as wine involvement, wine expertise and experiential consumption applied in unique ways and to new settings. New trends have been identified with respect to consumer preferences and social norms in special cultural contexts. This special issue has also shed light on consumer beliefs and behaviors regarding wine consumption and purchase that are uniquely linked to alternate hospitality spaces such as hotels and wine bar and shops.

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Small winery-restaurant relationship building: challenges and opportunities

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Abstract

Purpose – Wine is an important profit center for restaurants. The purpose of this paper is to address some of the challenges and opportunities at the nexus of wine and hospitality, with an eye on relationship building between smaller wineries and dining establishments.

Design/methodology/approach – The paper is essay style with acknowledgments made to extant literature, as well as US industry-based intelligence.

Findings – Primary challenges facing small wineries trying to enter the restaurant market revolve around constraints imposed by the traditional distribution system mindset, as well as pricing issues affecting procurement and markup of wine for restaurant use, limited abilities to provide sufficient inventory and the lack of time and people resources. Counterpoint discussion reveals opportunities related to increased focus on experience-based wine sales in restaurants, the importance of the story and the value of co-branding.

Practical implications – Partnerships with restaurants can be a delicate yet desirable part of a small winery’s strategy. The key is to develop a mutually beneficial relationship, while fulfilling the objectives and missions of both winery and restaurant. When wineries and restaurants carve out the time and invest the people resources to successfully and purposefully co-brand, optimum symmetry is formed which leads to mutually valued dining and special gastronomic experiences for the winery/restaurant partners and their customers.

Originality/value – In a viewpoint format, the paper outlines and discusses the key elements of relationship building between small wineries and restaurants.

Keywords Relationship building, Restaurants, Small wineries

Paper type Research paper

Introduction

There is an adage in the restaurant business that the kitchen supports the overhead, but the bar generates the profits. While wine is a significant profit center, its role in a restaurant is far beyond economic. Wine enhances a restaurant’s image and reputation. It enriches guests’ dining experiences and maximizes their satisfaction. Wine has long been associated with unique
stories, many of them emanating from smaller producers. These wine stories add to the special ambience in restaurants. Thus, restaurateurs continue to encourage enriched diner appreciation through expanded wine choices, food pairings and specialized wine-focused events.

The impetus for the current discussion is fueled by the critical symbiosis of wineries and restaurants. The purpose of this viewpoint paper is to address some of the challenges and opportunities at the nexus of wine and hospitality, with an eye on relationships building between smaller wineries and dining establishments. The discussion is based mainly on the US market.

Attaining a desired spot on restaurants’ wine listings becomes a daunting task for smaller producers due to the overpowering role of wine distribution firms and a longstanding view that “price is king” in restaurant purchasing. Smaller wineries are the ones least assured of a place in restaurants, as they tend to have higher wholesale price points than larger wineries and may not have sufficient production to be attractive to established wine distributors that service multiple restaurants. To illustrate, the most recent report by the Silicon Valley Bank on the state of the US wine industry reveals that small wineries had the sharpest drop in sales at restaurants, plunging from 32 to 17 per cent in just three years (SVB, 2017). Such evidence from the industry suggests that business relationships between small wineries and restaurants are ill-defined or non-existent. Many small wineries enter into relationships with only a few restaurants and do so primarily for marketing reasons rather than revenue production. A small winery’s primary goal for restaurant partnerships is often the activation of co-branding to raise overall consumer awareness and boost the prestige of the wine brand via association with a recognized dining establishment. Building a meaningful and lasting partnership to maximize value for both businesses starts with a fundamental understanding of challenges and opportunities. The challenges influence the formation of the relationships, whereas the opportunities stem from the relationship and also strengthen the partnership. Figure 1 frames a discussion of several key elements critical to this relationship.

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**Figure 1.**
Small winery-restaurant relationship building framework
Key challenges for small wine producers
Some of the challenges that exist regarding connecting small wineries to restaurants include:

- pricing issues affecting procurement and markup of wine for restaurant use;
- limited abilities to provide sufficient quantity of wine directly to restaurants or via traditional distribution networks; and
- issues with time and people resources.

Price points
A leading challenge in the case of smaller wineries pertains to wholesale wine prices and increasing markups. When sold by the bottle, restaurants typically sell wine at two to three times their wholesale price, with 400 per cent and even higher markups in some cases (Wall Street Journal, 2013). In by-the-glass (BTG) programs, restaurants aim for markups that recoup five times the initial purchase cost – with the price of the first glass typically covering the entire (wholesale) bottle cost (Kane, 2017). When a transaction involves a distributor, an additional 30 per cent fee is generally added (Kane, 2017).

As with any product market, there are perceptual ceilings on wine prices in restaurants. Industry standards dictate that the higher the cost of the bottle, the lower the markup should be. Research studies also caution that, in today’s technology-driven world, savvy diners can easily detect overpriced wine by using mobile apps and making on-the-spot price comparisons while ordering wine in the restaurant (Corsi et al., 2012; Perla et al., 2014; Terrier and Jaquinet, 2016).

Such price point constraints contribute to opinions that higher-priced small producers are not a viable source of wines for mainstream restaurants. Indeed, smaller wineries with slim margins find it difficult to achieve the lower wholesale prices that restaurants count on to keep in-dining wine selections affordable to restaurant patrons. At best, wine sales to restaurants do not generate optimal profits for small wineries. Instead, placement of smaller (often local) wineries’ wine in restaurants more commonly serves as a branding or marketing strategy with wholesale restaurant pricing usually hovering slightly above a small winery’s breakeven point. Wineries seeking higher price points need to guarantee high-quality products by submitting their wines to “outside” tasters. For example, expert testimonials and awards can help to substantiate quality, gaining the winery a competitive advantage when negotiating with restaurant buyers.

Capacity limits
Considering traditional distribution mechanisms, a second challenge is that small wineries seldom have the ability to meet supply quantity requirements that restaurants or distributors demand as part of their contractual agreements. By the US wine industry standards, small wineries produce on average about 5,000 cases a year or less (Wines and Vines, 2018). Making the decision to set aside the quantities needed to satisfy distributors and restauranteurs is an important capacity consideration, particularly if it depletes the supply available for higher revenue-earning tasting room sales.

The issue of supply quantity is highly linked to the type of restaurant and to the restaurant’s philosophy regarding menu consistency. Many restaurants rotate wines to match seasonal menus and change wine lists as much as six times a year (Lockshin et al., 2011; Oliveira-Brochado and Vinhas da Silva, 2014). In such cases, smaller wineries can be
tapped to supply wines for a seasonal offering (or special events) rather than requiring a long-term commitment.

**Time/people resources**
To build solid relationships, time and commitment are required directly from restaurant owners, executive chefs, sommeliers or beverage managers. Even those wineries that rely on third-party distributors need to recognize the importance of the personal relationships with both the distributors and restauranteurs. For restaurants to carry a small winery’s wines and for customers to select them, wineries need to help restaurants communicate their differentiated products. Regular wait staff training and tastings specific to the winery’s offerings can help promote and boost wine sales (Gultek et al., 2006; Ruiz-Molina et al., 2010). Training and staff familiarization programs take time though. They require deliberate planning and release of staff from both the wineries and the restaurants. Although time-intensive, nurturing relationships between winery and restaurant owners, executive chefs, sommeliers, beverage managers and marketing staff is a key to successful partnerships among small wineries and restaurants.

**Key opportunities for small wine producers**

*The story*

The history and stories surrounding the winery or specific wine offerings capture the attention of diners and contribute to effective wine branding, marketing and sales (Alonso and Northcote, 2009). Telling the winery’s story is a viable way to bolster the wine-purchase experience. Product-oriented tasting notes and wine descriptions on the menu are no longer enough to satisfy experience-seeking consumers. The storytelling of the wine and its tradition is an innovative way to engage restaurant patrons to encourage associated co-branded loyalty.

Highlighting the stories behind the wines on the restaurant’s menu has been reported to enhance customers’ overall dining experiences (Gil-Saura et al., 2008). This is particularly true for smaller wineries in the region surrounding the restaurant because it converts the dining experience into a larger touristic phenomenon. Industry evidence suggests that restaurants that support smaller regional wineries report doing so because of the value that their customers place on local products. Nowadays, many patrons expect local wines to be on restaurant wine lists. Recent studies report that local food and wine attract customers across multiple price points, spiking wine profits for the establishment (Boesen et al., 2017). Moreover, how customers define local has more to do with social definitions of human communities than regulatory definitions and geographical mapping, indicating that stories rather than mileage distances are what diners wish to know (Perla et al., 2014). Smaller wineries can more easily forge relationships with respected dining establishments that are known for sourcing local products. The local winery and local farm-to-table dining venues are perfect matches.

*Enhanced dining experiences*

In the past, wine and food pairing interests of restaurant goers took a back seat to selection criteria such as price, origin, grape varietals, awards and tasting notes (Corsi et al., 2012). However, recent trends have reordered these elements. Diners now ask for more information on which wines complement their selected menu items. They mostly want to know if the attributes of a wine will mesh with the attributes of a particular culinary dish. A small producer’s wine can be easily introduced in this way by stressing the more hedonic drinkable qualities of the wine to the diner.
By recommending wines to complement a dish, restaurants can significantly increase their average dinner checks and provide greater gastronomic satisfaction to their guests (Harrington, 2005). Wine recommendations that are part of the food menu, as opposed to being a standalone wine list, are associated with higher wine sales (Gultek et al., 2006; Ruiz-Molina et al., 2010). Likewise, studies suggest that providing regional wine information on the food menu, table tents or via trained wait staff produces higher wine sales in restaurants (Terrier and Jaquinet, 2016).

Wine recommendations can lead at times to the selection of more expensive alternatives when servers present the diner with an array of options at various price points (Corsi et al., 2012). Additional studies found that active wine recommendations increase sales by lessening perceived risk (Wansink et al., 2006). Thus, wait staff should be trained in suggestive selling techniques related to wine, including recommending a wine (or a choice of three to four wines) based on diners’ menu selections and offering low-priced tasting portions or flights to allay risk prior to buying wine BTG or bottle.

Co-branding
Most winery proprietors view restaurant partnerships as branding and marketing strategies and not as profit generation centers. However, co-branding requires a deeper understanding of how the relationship provides value to both the winery and to the restaurant partner. Hariharan et al. (2012) point out that organizations need to carefully assess the spillover effects that arise in co-branding situations, as the reputation of one brand impacts consumer opinion of the partner brand. Wineries need to partner with restaurants that enhance the image of the winery and are a good fit for supporting the winery’s story and values.

It is equally important to recognize that a restaurant reputation is impacted by its business partners, including its suppliers. Eating establishments have begun to recognize the impact of information about supplier-based ingredient and point-of-origin on diner purchases (Jacob et al., 2017). When wineries provide detailed background on their products, the restaurant can satisfy diners’ needs with timely and accurate information. By endorsing each other, co-branded partnerships between small wineries and restaurants strengthen customer brand loyalty for both businesses.

Conclusion
The importance of wine in restaurants continues to grow. More restauranteurs nowadays are taking advantage of consumers’ growing interest in wine. Restaurants are offering a wider range of wines (including regional and local offerings) to attract customer seeking enhances dining experiences.

Selling wine in restaurants presents both challenges and opportunities. Challenges for small wineries discussed here comprise issues around higher wholesale price points, lower capacity for wine production and time/people resource limitations. On the other hand, opportunities exist in the form of offering wines as selling the regional winery’s story, emphasizing food–wine pairing and hedonic diner experiences rather than traditional wine descriptors and increasing the perception of value of co-branding relationships.

Diners know that wine at restaurants costs more – substantially more. But customers are willing to pay more for enriched dining experiences, the stories behind the wine on their table and for learning how to best match wine and food to their own
palates. Thus, partnerships with restaurants can be a delicate yet desirable part of a small winery’s strategy. The key is to develop a mutually beneficial relationship while fulfilling the objectives and missions of both winery and restaurant. When wineries and restaurants carve out the time and invest the people resources to successfully and purposefully co-brand, optimum symmetry is formed, which leads to mutually valued dining and special gastronomic experiences for the winery/restaurant partners and their customers.

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Wine involvement interaction with dining group dynamics, group composition and consumption behavioural aspects in USA restaurants

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Abstract
Purpose – The importance of the wine involvement construct in explaining consumers’ wine consumption behaviour is widely acknowledged in the literature, as is the social nature of dining out with others. Yet, there is a paucity of research examining the relationships between how this construct interacts with dining group dynamics and wine consumption behavioural aspects in the restaurant environment. This study aims to investigate these aspects in US restaurants.

Design/methodology/approach – Utilising an online survey that yielded a sample of 513 respondents from across the USA who frequented all the recognised restaurant categories, respondents are segmented into low and high wine involvement categories using a reliable wine involvement scale. The authors examine differences between various dining group dynamics, dining group composition, main choice factors when ordering wine and method of ordering wine in US restaurants.

Findings – The authors find that diners’ level of involvement with wine provides sharp insights into several significant differences between involvement and dining group dynamics, group composition, choice factors when ordering wine and method of ordering wine in restaurants. High involvement diners dine out in larger groups, order more wine, spend more money on wine, are more often the main decision-maker ordering wine for the dining group and use wine menus and wall board displays more often when ordering than low involvement diners. They are also more discerning about the taste of wine, grape variety and wine style in terms of choice factors when ordering.

Practical implications – The nature and dynamics of dining groups are aspects that have profound implications, in various ways, for the restaurant industry. The level of involvement diners have with wine is a strong predictor of various outcomes in terms of dining group behavioural aspects regarding wine. Wine-related restaurant category-specific profile descriptions, such as those developed in this study, can be helpful for restaurants when creating business strategies.

Originality/value – The authors make a substantive contribution by being the first study to examine the relationships between dining group dynamics, dining group composition and behavioural aspects concerning wine consumption and involvement in the restaurant environment. The authors then map this information to derive wine-related profile descriptions for all US restaurant categories.

Keywords Market segmentation, Conceptual/theoretical, Wines, Consumer behaviour, Survey research, Scale development/testing

Paper type Research paper
Introduction

Wine is an important component of the US restaurant industry representing US$19.8bn in sales value in what is the largest wine consuming market in the world. Restaurant sales in the USA totalled US$766bn in 2017. This shows a strong upward trend from US$370bn in 2000 and US$587bn in 2010 (National Restaurant Association, 2017). More specifically, dining-drinking establishments accounted for US$548bn (72 per cent) of the total restaurant industry sales with table service restaurants and limited service restaurants contributing US $263bn and US$234bn respectively of that figure (National Restaurant Association, 2017). The total US wine market is worth US$44bn, and while the on-premise trade “only” has a 16 per cent share of volume it contributes a significant 45 per cent of the total market value. To put the importance of alcoholic drinks to the US foodservice industry in further perspective, ratios in per cent value analysis for food to drinks are 77 per cent to 23 per cent for full-service restaurants and 23 per cent to 77 per cent for cafés/bars (Euromonitor International, 2018). While wine volumes sold in the on-premise sector have been stagnant during the five-year period 2012 to 2017, value has increased by nearly 11 per cent during the corresponding period (Euromonitor International, 2017). This underlines the importance and potential for further growth of wine sales in the on-premise sector. Eating out is part of the American lifestyle to such an extent that 90 per cent of consumers say they enjoy going out to restaurants compared with “only” 66 per cent who enjoy going to grocery stores (National Restaurant Association, 2017).

Consumer behaviour has long preoccupied marketers as they strive to best position their product by anticipating consumer wants and needs. The consumer decision-making process is, however, frequently complicated and can be explained by a number of theoretical constructs, also relevant to the foodservice market where wine represents a good example of these phenomena (Roe and Bruwer, 2017). There has, nevertheless, been surprisingly little situational research (i.e. in the restaurant situation) to explain the interaction of product, situational and personal factors, more specifically, the wine product involvement and consumption situation (Hirche and Bruwer, 2014). While involvement with wine as a product has been used as an explanatory medium with consumers segmented into high- or low-involvement categories (Barber et al., 2007; Bruwer and Huang, 2012; Hirche and Bruwer, 2014), this has not been done in the restaurant setting.

According to Sobal and Nelson (2003), the eating of food by humans is largely a social activity to such an extent that “eating alone is devalued and is not considered a real meal for many people” (p.88). Hence, in the restaurant setting by far, the majority of people are dining in a group situation with other people (Her and Seo, 2018) and solo dining is fairly uncommon (Bruwer and Johnson, 2005). The size of the dining group, the nature of the relationships between dining group members and the composition of the group are likely to have an impact on the consumption behaviour related to products being offered in the restaurant, such as wine. There is a paucity of research focused on wine consumption and dining group dynamics, composition and decision-making, and no previous study has examined the potential relationship(s) between these variables and wine involvement, which is a firmly grounded theoretical construct. There has also been no research linking these to the various restaurant categories (full-service family, casual ethnic foodservice, fine dining upscale, bar/taverns, cafeteria/grill/buffet and quick-service/limited service restaurants), either in the USA, which is the focal market of our study, or elsewhere.

Our study makes a substantive contribution in four ways. Firstly, by examining how wine involvement level relates to dining group dynamics and dining group composition. Secondly, by determining how wine involvement level relates to the amount of wine consumed and amount spent on wine in restaurants. Thirdly, by identifying the main choice
factors used by low- versus high-involvement consumers when ordering wine in a restaurant and method(s) of ordering it. Finally, it provides a wine-related profiling metrics grid for all restaurant categories in the US market.

Literature review
There has been a multitude of research studies focusing on wine in the hospitality environment, specifically within the restaurant domain. These include, but are not limited to, wine service training (Gultek et al., 2005); wine menu/list design (Barth, 2011; Berenguer et al., 2009; Gil et al., 2009; McCall and Lynn, 2008), wine origin (Bruwer et al., 2012), risk perception and risk reduction (Bruwer et al., 2017a; Lacey et al., 2009; Terrier and Jaquinet, 2016), and wine involvement (Barber et al., 2007; Bruwer and Huang, 2012; Hirche and Bruwer, 2014; Hollebeek and Brodie, 2009; Roe and Bruwer, 2017). Despite some advocacy for market segmentation based on consumers’ wine involvement (Barber et al., 2007; Lesschaeve and Bruwer, 2010), no previous study has focused solely on diners in the restaurant environment and explored relationships between involvement, dining group size and composition, etc.

Role of wine in restaurants
Wine is widely served as a food accompaniment in restaurants. It is also a generally accepted fact that the sale of wine can add significantly to a restaurant’s profitability (Barth, 2011; Berenguer et al., 2009; Frost, 2015; Gil et al., 2009; Hansen, 2015; Wansink et al., 2006). For example, in Australia, profitability varies between 26 per cent and 29 per cent (Bruwer and Johnson, 2005; Bruwer et al., 2012), and in Spain, it accounts for 32 per cent of the average restaurant bill (Gil et al., 2009). However, studies have discovered that selecting wine in a restaurant is associated with a stressful experience and has an associated risk perception (Bruwer et al., 2017a; Lacey et al., 2009). Nevertheless, surprisingly little research has been conducted on illuminating various aspects of the dining occasion and specifically, the dining group, method of ordering wine, choice factors and wine involvement level, as these relate to wine consumption in restaurants.

Wine product involvement and wine purchasing
The historical roots of the involvement construct can be found many decades ago in social psychology, but it was not until the mid-1980s that researchers began to understand the importance of studying this construct for the purpose of segmenting markets (Lesschaeve and Bruwer, 2010). It has been described as “a person’s perceived relevance of the object based on inherent values, needs and interests” (Zaichkowsky, 1985, p. 342). Much of the initial involvement research focused on its role in advertising (Celsi and Olson, 1988; Laurent and Kapferer, 1985). Since then, the involvement construct has received much attention due to its significant influence on consumer purchasing behaviour (Dholakia, 2001).

Although involvement theory views consumer behaviour as a continuum covering a range of cognitive and behavioural processes (Barber et al., 2009, p. 61), from early on, researchers (Bloch, 1981; Bloch and Richins, 1983; Celsi and Olson, 1988; Richins et al., 1992) distinguished between enduring involvement and situational involvement in the process of studying involvement. In its simplest form, a primary distinction between enduring involvement and situational involvement is temporal duration (Richins and Bloch, 1986). Enduring involvement is a rather stable phenomenon that represents the consumer’s personal interest in the product class over a long period (Park et al., 2013). Situational involvement, on the other hand, is the temporary arousal of a consumer’s interest that
fluctuates, usually within the timeframe of a purchase decision (Park et al., 2013), such as ordering a bottle of wine or wine by-the-glass (WBG) from a restaurant’s wine list when dining there (Bruwer and Cohen, 2019). Situational involvement is the outcome of the consumer’s interaction with the product and the purchase situation. It is an incorrect assumption that a consumer with low involvement in a certain product would always put little effort in purchasing (Hirche and Bruwer, 2014).

Both enduring and situational involvement represent states of arousal and product interest. Both also have similar behavioural outcomes such as information search and dissemination (Ogbeide and Bruwer, 2013; Richins and Bloch, 1986). There is considerable evidence that information seeking is used mainly as a risk-reduction strategy in response to risk perceptions and has been identified as an important risk-reduction strategy in wine purchasing (Bruwer et al., 2017a). In the current study, we examine methods of ordering wine using information (i.e. wine menus, table talkers, etc.) provided in restaurants.

Wine has long been regarded as a product category well suited to involvement research with the first wine-specific involvement study executed by Zaichkowsky (1985). Not surprisingly, research has identified involvement as an important variable that has a certain impact upon consumer behaviour in the wine market (Lesschaeve and Bruwer, 2010). Wine involvement has been loosely referred to as one’s personal involvement with wine (Barber et al., 2007) and the demonstrated relevance of involvement in wine purchasing is supported by several studies (Barber et al., 2007; Bruwer and Buller, 2013; Bruwer and Huang, 2012; Hirche and Bruwer, 2014; Ogbeide and Bruwer, 2013). Involvement has also been linked to wine buying and it has been shown that consumers with different levels of involvement behave differently (Bruwer and Huang, 2012; Hirche and Bruwer, 2014). Zaichkowsky (1985) is of the opinion that the use of key attributes such as grape variety, region of origin and price is influenced by involvement. There is, nevertheless, a dearth of research examining the role of wine involvement in the restaurant environment among diners and how this relates to aspects such as dining group behaviour and decision-making.

Dining group dynamics and composition

The literature emphasises that communal eating and sharing mealtimes with other people is a deeply embedded human behaviour (Sobal and Nelson, 2003). Unsurprisingly, the intense social nature of dining out in restaurants has, thus, been well documented (Alonso et al., 2013; Bruwer and Johnson, 2005; Her and Seo, 2018; Sun and Morrison, 2007). Moreover, in a service environment such as restaurants, other individuals have been highlighted as a crucial human factor, influencing consumers’ affective and cognitive responses (Her and Seo, 2018; Liu and Mattila, 2015). People form their self-concept (Roe and Bruwer, 2017) according to the social identity theory and also the social categorization theory with respect to which social groups or categories the individual belongs to, is affiliated with and feels psychologically connected to (White and Dahl, 2007).

In response to the question if the presence of others affects how much other people eat, Herman, Roth and Polivy (2003, p. 873) go as far as to emphatically answer “definitely yes”. However, depending on the explanatory theory used to understand such behaviour, people eat either more or less when dining in the company of others depending on the amounts their dining companions eat (Herman et al., 2003). Whilst several studies (Dibb-Smith and Brindal, 2015; Polivy and Pliner, 2015; Salvy et al., 2007) examined and made conclusions about the effects of group dynamics and composition (also known as social facilitation theory) on food consumption, there is a lack of similar research focused on wine consumption in restaurants.
Given the general consensus that the majority of people dine out in restaurants in a group situation and the fact that the very nature of wine consumption is highly social (Bruwer et al., 2012), we combine this with the fact that people with high wine involvement are also highly likely to provide information about wine to others. Considering that people who have both a high involvement in and expertise of the wine product category are likely to want to impress others (Roe and Bruwer, 2017; Hollebeek and Brodie, 2009; Lesschaeve and Bruwer, 2010), we derive the study’s first hypothesis and postulate that:

\( H1 \). Diners with a high level of wine involvement are more likely to be part of a larger dining group than those with a low wine involvement level.

Another aspect to consider when examining the nature of the dining group is the type of relationship(s) a focal person has with the other group members. This can range between extremes from a close spousal relationship to a complete stranger such as a potential business associate who is being met for the first time. In between the two, there are close or less close relationships such as with family, friends and work colleagues and combinations thereof, depending on the size of the dining group. There exists a dearth of information that provides guidance regarding the potential setting of a hypothesis to direct the examination of the nature of the relationship between group members and wine involvement level; hence, we also set no specific hypothesis in this regard. We, nevertheless, examine this aspect with a view to providing direction for future studies to set hypotheses and add to the theory base.

**Quantity consumed and amount of money spent on wine**

Although the group context is widely acknowledged as influencing quantity of food ordered and consumed (Alonso et al., 2013; Dibb-Smith and Brindal, 2015; Her and Seo, 2018; Polivy and Pliner, 2015), no similar study has been executed to examine wine ordering and consumption in the context of restaurants. This lack of information relating to group dynamics when considering wine in restaurants include baseline metrics such as the size of the dining group. Our study contributes by examining these aspects.

When considering whether involvement level affects the quantity of wine consumed and the amount of money spent on wine, there is a body of evidence confirming that high-involvement wine drinkers spend more money on wine and consume larger quantities than low involvement drinkers (Barber et al., 2007; Bruwer and Huang, 2012; Gultek et al., 2005; Hirche and Bruwer, 2014). We, therefore, derive \( H2 \) and \( H3 \):

\( H2 \). Diners with a high level of wine involvement consume more wine than low involvement diners when dining out in a restaurant.

\( H3 \). Diners with a high level of wine involvement spend more money on wine than low involvement diners when dining out in a restaurant.

**Decision-making, choice factors and method of ordering wine**

There has also been little research on decision-making when ordering wine in a restaurant setting. Moreover, this decision is consistently referred to as being “complicated” (Barth, 2011; Berenguer et al., 2009; Bruwer et al., 2017b; Bruwer and Huang, 2012; Bruwer et al., 2012; Gil et al., 2009; Lacey et al., 2009). This is not surprising, given the fact that wines offered in a restaurant are generally not pre-viewed as they would be in a retail store, but instead ordered using a wine menu/list, which in a dining group situation has associated social pressures. Our research contributes by not only identifying the incidence of primary decision-making when
ordering wine, but also by pinpointing the socio-demographics of the decision-maker within the dining group. Firm theoretical grounding is provided by anchoring this aspect within the wine involvement construct from which we derive H4:

**H4:** Diners with a high level of wine involvement are more often the main decision-maker when ordering wine in a restaurant than those with a low wine involvement level.

It stands to reason that the previously discussed social cues and group pressures affect behaviour in the restaurant environment (Dibb-Smith and Brindal, 2015; Herman et al., 2003), even more so when wine involvement level is considered to be an independent variable. More specifically, the effect on the diners’ ordering method of wine (Barth, 2011) and the main choice factors used when ordering wine (Lacey et al., 2009) should be considered. Amongst the choice factors when selecting wine, taste, wine style (i.e. red or white) and grape variety (i.e. Cabernet Sauvignon or Chardonnay) and price tend to dominate the decision (Bruwer and Johnson, 2005; Lacey et al., 2009). Through H5, H6 and H7, we therefore postulate that:

**H5.** Diners with a high level of wine involvement are more likely to use the wine menu when ordering wine in a restaurant than those with a low wine involvement level.

**H6.** Diners with a low level of wine involvement are more likely to use the advice of service staff when ordering wine in a restaurant than those with a high wine involvement level.

**H7.** Diners with a high level of wine involvement are more likely to use the taste of wine, wine style and grape variety as the main choice factors when ordering wine in a restaurant than those with a low wine involvement level.

**Methodology**

The main aim of this study is to identify how diners’ involvement with wine impacts their wine consumption behaviour when dining in US restaurants and how this relates to the nature, composition and size of their dining group. During the operationalisation process, a scale was designed for measuring the diners’ wine involvement level. To date, most wine involvement studies either developed/used scales that measured only the enduring wine involvement construct (Barber et al., 2007; Bruwer and Buller, 2013; Bruwer and Huang, 2012; Hirche and Bruwer, 2014; Hollebeek and Brodie, 2009). In the restaurant context, which is very situation-specific, it is essential that the (temporal) situational involvement construct also be incorporated in the measurement of wine involvement. A five-item involvement scale developed by Dholakia (2001) brought together both components of involvement and delivered robust results. Therefore, given the fact that no similar scale with wine as product focus has been developed, we adopted Dholakia’s (2001) scale and adjusted it to wine as a product and restaurants as its situation-specific context. As far as the practical implications of this study are concerned, the main aim is to develop profile descriptions, informed by the study’s findings, for all US restaurant categories.

**Sample**

An online survey was executed in the USA by engaging a professional consumer panel company involving people of legal drinking age (21 years and older) who consumed wine and had dined out at least once during the previous month at any one of the US restaurant
categories (Canziani et al., 2016; National Restaurant Association, 2017) where they consumed wine on that occasion. All information obtained from the respondents relate only to their last dining occasion in a restaurant. The online survey eliminated the logistical issues and invasion of diners’ privacy that occurs when information is collected in situ at restaurants whilst providing the advantage of sampling across the USA and its different restaurant categories. Table I exhibits the socio-demographic characteristics of the sample.

Table I shows that 50.1 per cent of the respondents are male and 49.9 per cent female, the main age generational cohorts are 21-36-year-old millennials (35 per cent), 37-52-year-old Generation-Xers (34 per cent) and 53-71-year-old Baby Boomers (16 per cent), 75 per cent are married or co-habiting in a household with a partner, have a household size of “only” 3 persons, 76 per cent have a university bachelor degree or college educational qualification, with a mean annual gross household income of US$92,203. In terms of identifying the restaurant category where the respondents’ most recent dining experience took place prior to participating in the survey, Table I reveals that full-service family restaurants (49 per cent) are patronised the most by far, followed by casual ethnic food service (14 per cent), fine-dining upscale (12 per cent), bar/tavern (12 per cent), with the remaining restaurant categories making up the remaining 13 per cent. Moreover, the average number of dining out occasions of four times a month is reflective of diners with a high level of experience in the restaurant environment.

Procedure
An online survey programmed in Qualtrics was used to collect the information with quality controls inserted in the case of the involvement measurement scale used. An online survey eliminated the logistical issues and invasion of diners’ privacy faced when having to collect information in situ in restaurants, an aspect highlighted by Bruwer et al. (2017a). The respondents took on average 13 min to complete the survey which was part of a larger project. There were five involvement scale questions and 15 demographic and other categorical questions. The data were collected during a one-week period in 2017. Of the 1,328 initial responses, 615 were completed, resulting in a 46 per cent response rate. However, due to incomplete responses to survey questions, 513 surveys could be utilised for further analysis. We analysed the data using IBM SPSS 24.0 software.

Segmenting diners into wine involvement segments
The results in Table II were used to split the respondents into segments based on their involvement with wine using a five-item seven-point Likert scale that combined enduring and situational involvement which we adapted from Dholakia (2001). The resulting final wine involvement measurement construct was used to segment the sample into two distinct consumer groups (low and high involvement).

After re-specification, the possible involvement score range was 5 to 35 (minimum score of 1 * 5 and maximum score of 7 * 5). Each respondent was then recoded into “high involvement” (above the median) and “low involvement” (below the median = 21). First, an overall involvement score was calculated for the five scale items with involvement scores ranging between 5 and 35 with a mean = 21.1 and median = 21.0. This yielded breakpoints to allow splitting involvement into two different categories, with answers spread throughout the whole range:

1. high involvement: overall score = 22 to 35: 46.6 per cent of respondents; and
2. low involvement: overall score = 5 to 21: 53.4 per cent of respondents.
A small majority of diners (53 per cent), thus, have a low wine involvement level, while the high involvement segment includes 47 per cent of diners. This wine involvement segmentation structure was forthwith used in answering questions to achieve the aims of the research study and test the hypotheses. The scale was checked for reliability and internal consistency to ensure that it was free from random errors that may affect the accuracy of the results. That was done through Cronbach \( \alpha \) measurement of reliability. Table II displays the results and an overall \( \alpha \)
Coefficient of 0.922 which is considerably above the minimum level of 0.700 for a scale to be regarded as having internal validity (Nunnally, 1978). Sensitivity analysis conducted on an item-by-item basis (α if scale item is deleted) showed a very narrow range of variability and high inter-item correlation (>0.720). The scale was, therefore, regarded as suitable for the further analysis of the data.

Results and discussion

Dining group size, quantity of wine consumed and amount spent on wine

The results in Table III reveal that the dining groups are multi-person in nature (3.98 persons on average), which underlines the social nature of the dining situation in restaurants and supports the social identity and social categorisation and social facilitation theories (Dibb-Smith and Brindal, 2015; White and Dahl, 2007). Notably only 4 per cent of the respondents are solo diners; a finding which contradicts the claim of Her and Seo (2018) that a large percentage of US diners eat alone in restaurants. Thus, we conclude that group dining is extremely prevalent in restaurants in the USA. High-involvement consumers dined out in significantly larger groups than low involvement consumers (F = 19.622, p = 0.000** at the 0.01 level) in the process confirming H₁. The relatively large dining group sizes of both high and low wine involvement consumers have a direct influence on the amount of wine consumed during the dining occasion.

People generally order wine in full bottles (750 ml) and/or wine-by-the-glass (WBG) format when dining out in restaurants (Bruwer et al., 2017a; Bruwer and Cohen, 2019). To compare the quantity of wine consumed by low- and high-involvement consumers shown in Table III, we converted full bottles consumed using the yardstick that the average serving of both red (13 per cent alc.) and white (11.5 per cent alc.) wine in a glass is 150 ml which is regarded as a standard drink size (Australian Bureau of Statistics, 2014). This means that a standard-size full bottle of wine contains five WBG single servings. Therefore, both full bottle and WBG servings are “counted” as single-serve WBG units. Highly significant differences are again observed in both instances with dining groups with high-involvement consumers who collectively drink up to three times more wine than groups with low-involvement consumers (for full bottle: 61.523, p = 0.000** at 0.01 level; for WBG: F = 51.123, p = 0.000** at 0.01 level). H₂ is therefore confirmed.

Table II. Wine involvement measurement scale item descriptive statistics and reliability measures

<table>
<thead>
<tr>
<th>Scale item</th>
<th>MEAN</th>
<th>VAR</th>
<th>SD</th>
<th>Inter-item correlation</th>
<th>α if item deleted*</th>
</tr>
</thead>
<tbody>
<tr>
<td>I would rate wine as being of the highest importance to me personally</td>
<td>3.89</td>
<td>4.136</td>
<td>2.034</td>
<td>0.820</td>
<td>0.900</td>
</tr>
<tr>
<td>I could make many connections or associations between important experiences in my life and wine</td>
<td>4.36</td>
<td>3.315</td>
<td>1.821</td>
<td>0.796</td>
<td>0.905</td>
</tr>
<tr>
<td>In general, my wine would help others to see me to the way I would like them to see me</td>
<td>3.96</td>
<td>3.821</td>
<td>1.955</td>
<td>0.806</td>
<td>0.903</td>
</tr>
<tr>
<td>When purchasing the wine on a dining occasion, I would have a high level of interest in the purchase process</td>
<td>4.54</td>
<td>3.239</td>
<td>1.800</td>
<td>0.757</td>
<td>0.912</td>
</tr>
<tr>
<td>On a dining out occasion, I would put a lot of effort into purchase of the wine</td>
<td>4.26</td>
<td>3.486</td>
<td>1.867</td>
<td>0.720</td>
<td>0.901</td>
</tr>
</tbody>
</table>

Notes: Involvement items measured using seven-point Likert scale; *Overall scale reliability Cronbach α coefficient = 0.922; Hotelling’s T-squared test (F = 33.206; df = 528; sig = 0.000)
This finding could also explain why respondents consumed 1.3 WBG servings on average. Reasons why an additional 6 standard 750 ml bottle of wine was ordered for tables may include the need to satisfy those whose wine of choice was not an available WBG option, feeling that WBG was too expensive relative to the quantity of wine received and/or simply wanting to consume larger quantities of wine on the occasion. Further research to fully explain these permutations will add value to the knowledge base.

Next, we examine differences between the total amount spent on wine in relation to the diners’ involvement level. Table III shows that dining groups, including high-involvement consumers spent significantly more (US$75.75) than the groups that included low-involvement consumers (US$21.65) with an overall expenditure across the involvement levels of US$56.65 (43.396, \( p = 0.000^{**} \) at 0.01 level) and confirms H3. The amount spent on wine when dining in restaurants is in all likelihood directly affected by the level of patronage of the different restaurant categories frequented by the diners. The selection of wines offered and their prices within dining establishments will vary amongst restaurant categories, but such investigation falls outside of the ambit of our research. However, future research that also measures the amount spent on food within the dining group will provide further insights.

**Dining group composition and nature of relationship with group members**

Using the social identity and categorisation theory as underpinning, the composition of the dining group and nature of the relationship (from very close to not close at all) are examined in terms of their wine involvement level, the independent variable (Table III). This is done to provide some insights into who people mainly dine out with and the nature of the relationship(s) with them. We find that the vast majority of respondents dine out in groups with people they are in a very close relationship with, and that, with the exception of dining with friends (regardless of how close their relationship is), significant differences exist.
between low- and high-involvement consumers. Note that participants could have dined with more than one group type (i.e. with a spouse/partner and friends); hence, the percentages listed for dining group composition are >100 per cent. Nearly 51 per cent of respondents indicated that their dining group included family and in the case of high-involvement consumers 64 per cent of them indicated they dined with family members \( \left( \chi^2 = 32.766, p = 0.000^{**} \text{ at } 0.01 \text{ level} \right) \). This shows a very high level of congruence with the restaurant categories frequented (see Table I) in that full-service family restaurants has a 52 per cent representation.

The second largest group participants dined with included their partner/marital spouse, with 49 per cent of respondents dining out with someone with whom they are romantically involved with. Significantly more high involvement consumers (55 per cent) dine with their partner/marital spouse than low-involvement consumers (43 per cent) \( \left( \chi^2 = 7.561, p = 0.009^{**} \text{ at } 0.01 \text{ level} \right) \). Based on the respondents who dined alone, low-involvement consumers engaged in this scenario more often 6 per cent \( \left( \chi^2 = 3.446, p = 0.049^{*} \text{ at } 0.05 \text{ level} \right) \).

Our research does not find significant relationships between any of the group types consisting of friends, work colleagues and business clients. Friends can arguably be categorised as a group type with which a respondent has a relationship level characterised as “intermediate” when compared with partner/marital spouse and family in which cases a close relationship is more likely to exist. This leads us to conclude that people dine out in groups composed mostly of persons with whom they are in a close relationship, and given the fact that this occurs more often in the case of high-involvement consumers, it at least partly, explains the high incidence of being the main decision-maker in the group when ordering wine (see Table IV). It, thus, seems logical to deduce that they assumed this role because they were dining out in a group within which they felt comfortable and not “socially challenged” when it came to the ordering of wine in restaurants.

<table>
<thead>
<tr>
<th>Variable</th>
<th>Overall (%)</th>
<th>Low involvement (%)</th>
<th>High involvement (%)</th>
<th>( \chi^2 )</th>
<th>Sig</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Main decision-maker</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Survey participant for ordering the wine</td>
<td>89.6</td>
<td>83.0</td>
<td>93.2</td>
<td>7.639</td>
<td>0.006**</td>
</tr>
<tr>
<td><strong>Method of ordering wine</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Wine menu/list</td>
<td>70.0</td>
<td>52.8</td>
<td>79.4</td>
<td>23.011</td>
<td>0.000**</td>
</tr>
<tr>
<td>Service staff advice</td>
<td>41.7</td>
<td>39.6</td>
<td>42.8</td>
<td>0.282</td>
<td>0.596</td>
</tr>
<tr>
<td>Wall board display</td>
<td>16.7</td>
<td>0.9</td>
<td>25.3</td>
<td>29.177</td>
<td>0.000**</td>
</tr>
<tr>
<td>Table talker</td>
<td>3.3</td>
<td>1.9</td>
<td>4.1</td>
<td>1.064</td>
<td>0.302</td>
</tr>
<tr>
<td>Others ordered the wine</td>
<td>2.7</td>
<td>1.9</td>
<td>0.0</td>
<td>5.660</td>
<td>0.025*</td>
</tr>
<tr>
<td><strong>Main choice factors in ordering wine</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Liked the taste of the wine</td>
<td>34.0</td>
<td>27.3</td>
<td>46.2</td>
<td>10.919</td>
<td>0.001**</td>
</tr>
<tr>
<td>Grape variety the wine was made from</td>
<td>33.0</td>
<td>29.4</td>
<td>39.6</td>
<td>3.252</td>
<td>0.048*</td>
</tr>
<tr>
<td>Style of the wine (red/white)</td>
<td>32.3</td>
<td>27.8</td>
<td>40.6</td>
<td>5.078</td>
<td>0.024*</td>
</tr>
<tr>
<td>Complemented the food ordered</td>
<td>29.3</td>
<td>23.7</td>
<td>39.6</td>
<td>8.372</td>
<td>0.004**</td>
</tr>
<tr>
<td>Dining companion recommended the wine</td>
<td>17.3</td>
<td>19.6</td>
<td>13.2</td>
<td>1.947</td>
<td>0.163</td>
</tr>
</tbody>
</table>

**Table IV.** Decision-making role, main choice factors and method of ordering based on wine involvement level

**Notes:** **Significant at 0.01 level; *significant at 0.05 level; multiple responses are possible**
Decision-making when ordering wine, method of ordering and main choice factors considered

Wine consumers with a high level of involvement in the product category often regard themselves as high on wine knowledge when questioned (Gultek et al., 2005). Given the fact that consumers with high involvement predominate the dining group types with the highest incidence in our study, it is necessary to test if there is a relationship between involvement level and being the main decision-maker when ordering wine in restaurants. The result in Table IV confirms that high-involvement consumers (93 per cent) are significantly more often the main decision-maker than low involvement consumers (83 per cent) when ordering wine ($\chi^2 = 7.639, p = 0.006^* \text{ at } 0.01 \text{ level}$), and thus confirms $H_4$.

Next, we determine what methods are used by the consumers when ordering wine in the restaurants and whether differences exist in terms of consumers’ involvement level. Table IV confirms that the wine menu/list is by far the method used the most when ordering, which also confirms the similar finding of Barth (2011). Significantly more high involvement users (79 per cent) used the wine menu/list when ordering wine than low-involvement (53 per cent) consumers ($\chi^2 = 23.011, p = 0.000^{**} \text{ at } 0.01 \text{ level}$). This could be related to a higher degree of confidence and/or knowledge but, either way, warrants further investigation.

High-involvement consumers (25 per cent) are also significantly higher users than low involvement consumers (0.9 per cent) of wall board displays containing information about available wines ($\chi^2 = 29.177, p = 0.000^{**} \text{ at } 0.01 \text{ level}$), thus confirming $H_5$. This could again be an indicator of high confidence among high-involvement consumers but also warrants further investigation. Our study did not control for the availability of such wall board displays in the restaurants, and this finding should, thus, be treated with some caution. There is no significant difference between the use of service staff advice by low involvement (40 per cent) and high-involvement consumers (43 per cent) ($\chi^2 = 0.282, p = 0.596 \text{ at } 0.05 \text{ level}$), and $H_6$ is there not confirmed. As for the other methods used for ordering wine, table talkers are minimally used with only 3 per cent incidence, whilst in the case of low-involvement consumers in 3 per cent of the cases the wine ordering was done by others ($\chi^2 = 5.660, p = 0.025^* \text{ at } 0.05 \text{ level}$).

Finally, we identify the main choice factors used by the decision-makers when ordering wine in restaurants. From a list of 20 choice factors provided, we identify the top five (Table IV) with the first four showing highly significant differences in terms of their use by high-involvement wine consumers. We find that high-involvement wine consumers use their liking of the taste of wine (46 per cent) the most, followed by the grape variety the wine was made from (40 per cent), the style of the wine (i.e. red/white) (41 per cent) and that the wine complemented the food they were eating in the restaurant (40 per cent). The test statistics gave results for respectively liking the taste of wine ($\chi^2 = 10.919, p = 0.001^{**} \text{ at } 0.01 \text{ level}$), grape variety the wine was made from ($\chi^2 = 3.252, p = 0.048^* \text{ at } 0.05 \text{ level}$), style of the wine, i.e. red/white ($\chi^2 = 5.078, p = 0.024^* \text{ at } 0.05 \text{ level}$) and complementing the food eaten ($\chi^2 = 8.372, p = 0.004^{**} \text{ at } 0.01 \text{ level}$). $H_7$ is, therefore, confirmed.

The only main choice factor that had a higher incidence of use amongst low-involvement wine consumers is that their dining companion recommended the wine (20 per cent) which reinforces the earlier deduction that low-involvement consumers are not as confident and/or knowledgeable when it comes to ordering wine. The top three main choice factors (liked the taste of wine, grape variety the wine was made from and the style of the wine (i.e. red/white)) confirm previous findings on wine choice cue use when buying wine (Bruwer et al., 2017b; Bruwer et al., 2012).
Profiling US restaurant categories using wine-related metrics descriptors

We complete our contribution by consolidating our findings into a matrix/framework that profiles each restaurant category in the US market to provide holistic insight into differences, similarities and other benchmarks.

Table V contains these data in categorical form in what in essence can be regarded as a segmentation of the US market based on restaurant categorisation (Canziani et al., 2016) as basis. We do not discuss the multitude of differences (and similarities) between restaurant categories in any detail, as this would be counterproductive to the theory contribution our research makes, although we allude to it further in the practical implications part of this document.

Conclusions, limitations and future research

Our study makes a substantive contribution in four ways: by examining how wine involvement level relates to dining group dynamics and dining group composition, determining how wine involvement level relates to the amount of wine consumed and amount spent on wine in restaurants, by identifying the main choice factors used by low-versus high-involvement consumers when ordering wine in a restaurant and method(s) of ordering. We then map this information to derive wine-related profile descriptions for US restaurant categories.

Our research is the first to examine the relationships between dining group dynamics, dining group composition and wine consumption behavioural aspects and wine involvement in the restaurant environment. We conclude that wine involvement is a robust and suitable theory construct to use when explaining differences between restaurant diners regarding their dining group dynamics and composition, decision-making when ordering wine, methods of ordering wine and main choice factors used when ordering wine in restaurants.

We confirm that diners with a high level of wine involvement are more likely to be part of a larger dining group than those with a low wine involvement level. We also find that diners with a high level of wine involvement consume more wine than low involvement diners and, spend more money on wine when dining out in a restaurant. Another finding is that diners with a high level of wine involvement are more often the main decision-maker when ordering wine in a restaurant. We also confirm that diners with a high level of wine involvement are more likely to use the wine menu and wall board displays when ordering wine, but only slightly more likely to use the advice of service staff than are diners with a low wine involvement level. Finally, we find that diners with a high level of wine involvement are more likely to use the taste of wine, wine style and grape variety as the main choice factors when ordering wine in a restaurant than those with a low wine involvement level which is a finding that confirms previous research (Bruwer et al., 2017b; Bruwer et al., 2012).

Knowing the outcomes of this research has practical implications for hospitality management and personal selling strategies by restaurants to encourage wine consumption. Currently, this research illustrates the value of high-involvement wine drinkers and shows that they use both physical materials and service-related aspects (i.e. the service staff) to help make their decisions. Perhaps, service staff should try and identify whether there is a high involvement diner within a dining group and invest time in “selling” to him/her. However, greater effort needs to be placed on developing strategies to sell to low involvement consumers, as well in the event that there is not a high-involvement diner present. The research illustrates that the wine list and the service staff are crucial in decision-making. There is also scope for considering sales strategies based on gender and age, as the findings illustrate larger differences in involvement classification. With half of all survey participants responding that their last dining experience occurred at a full-service family restaurant, it would be prudent to explore strategies that have a positive impact on diners’ likelihood to order wine in this
### Table V. US restaurant category wine-related profile metrics descriptions

<table>
<thead>
<tr>
<th>Descriptor/variable</th>
<th>Overall</th>
<th>Cafeteria/grill/buffet</th>
<th>Quick service/limited service</th>
<th>Bar/tavern</th>
<th>Fine-dining upscale</th>
<th>Casual ethnic foodservice</th>
<th>Full-service family</th>
</tr>
</thead>
<tbody>
<tr>
<td>Male (%)</td>
<td>50.1</td>
<td>48.3</td>
<td>41.5</td>
<td>64.4</td>
<td>44.3</td>
<td>47.9</td>
<td>50.0</td>
</tr>
<tr>
<td>Female (%)</td>
<td>49.9</td>
<td>51.7</td>
<td>58.5</td>
<td>35.6</td>
<td>55.7</td>
<td>52.1</td>
<td>50.0</td>
</tr>
<tr>
<td>Millennials (21-36 years old) (%)</td>
<td>16.4</td>
<td>55.2</td>
<td>29.3</td>
<td>64.4</td>
<td>32.8</td>
<td>33.8</td>
<td>27.8</td>
</tr>
<tr>
<td>Generation X (37-52 years old) (%)</td>
<td>35.4</td>
<td>20.7</td>
<td>36.6</td>
<td>20.3</td>
<td>34.4</td>
<td>38.0</td>
<td>37.6</td>
</tr>
<tr>
<td>Baby Boomers (53-71 years old) (%)</td>
<td>23.7</td>
<td>10.3</td>
<td>22.0</td>
<td>10.2</td>
<td>19.7</td>
<td>14.1</td>
<td>16.3</td>
</tr>
<tr>
<td>Silent generation (72-89 years old) (%)</td>
<td>23.7</td>
<td>13.8</td>
<td>12.1</td>
<td>5.1</td>
<td>13.1</td>
<td>12.7</td>
<td>17.9</td>
</tr>
<tr>
<td>Greatest generation (90-100 years old) (%)</td>
<td>0.8</td>
<td>–</td>
<td>–</td>
<td>–</td>
<td>–</td>
<td>–</td>
<td>0.4</td>
</tr>
<tr>
<td>Age mean (years)</td>
<td>47.5</td>
<td>43.2</td>
<td>46.8</td>
<td>39.0</td>
<td>48.7</td>
<td>47.3</td>
<td>49.9</td>
</tr>
<tr>
<td>No post-secondary educational qualification (%)</td>
<td>23.3</td>
<td>20.7</td>
<td>26.8</td>
<td>11.9</td>
<td>22.9</td>
<td>35.3</td>
<td>22.3</td>
</tr>
<tr>
<td>Undergrad post-secondary educational qualification (%)</td>
<td>44.8</td>
<td>44.8</td>
<td>56.1</td>
<td>37.3</td>
<td>41.0</td>
<td>42.3</td>
<td>46.4</td>
</tr>
<tr>
<td>Postgrad post-secondary educational qualification (%)</td>
<td>31.9</td>
<td>34.5</td>
<td>17.1</td>
<td>50.8</td>
<td>36.1</td>
<td>22.4</td>
<td>31.3</td>
</tr>
<tr>
<td>Total number of persons living in household</td>
<td>3.25 persons</td>
<td>4.38 persons</td>
<td>2.76 persons</td>
<td>3.44 persons</td>
<td>3.07 persons</td>
<td>3.23 persons</td>
<td>3.30 persons</td>
</tr>
<tr>
<td>Adults 21 years + old living in household</td>
<td>2.05 persons</td>
<td>2.28 persons</td>
<td>2.00 persons</td>
<td>2.12 persons</td>
<td>2.07 persons</td>
<td>2.10 persons</td>
<td>2.01 persons</td>
</tr>
<tr>
<td>Adults 21 years + old in household who drink wine</td>
<td>1.77 persons</td>
<td>1.62 persons</td>
<td>1.68 persons</td>
<td>1.76 persons</td>
<td>1.77 persons</td>
<td>1.79 persons</td>
<td>1.77 persons</td>
</tr>
<tr>
<td>Dining out frequency per month</td>
<td>4.06 times</td>
<td>4.03 times</td>
<td>4.46 times</td>
<td>3.95 times</td>
<td>4.33 times</td>
<td>3.65 times</td>
<td>4.08 times</td>
</tr>
<tr>
<td>Dining group size</td>
<td>3.98 persons</td>
<td>4.00 persons</td>
<td>3.10 persons</td>
<td>4.05 persons</td>
<td>4.03 persons</td>
<td>3.54 persons</td>
<td>4.21 persons</td>
</tr>
<tr>
<td>Quantity of wine consumed by group (WBG #)</td>
<td>5.14 glasses</td>
<td>7.70 glasses</td>
<td>3.75 glasses</td>
<td>6.79 glasses</td>
<td>5.34 glasses</td>
<td>3.35 glasses</td>
<td>4.74 glasses</td>
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<tr>
<td>Quantity of wine consumed by survey participant (WBG #)</td>
<td>1.30 glasses</td>
<td>2.18 glasses</td>
<td>1.18 glasses</td>
<td>1.65 glasses</td>
<td>1.40 glasses</td>
<td>0.95 glasses</td>
<td>1.12 glasses</td>
</tr>
<tr>
<td>Total amount spent on wine by dining group</td>
<td>US$56.65</td>
<td>US$66.00</td>
<td>US$24.00</td>
<td>US$80.00</td>
<td>US$75.18</td>
<td>US$43.14</td>
<td>US$53.33</td>
</tr>
</tbody>
</table>

Notes: *WBG = wine by-the-glass equivalent (150 ml) quantity poured from full bottle (750 ml)
restaurant category. The wine menu/list was used less frequently at full-service family restaurants than establishments such as cafeteria/grill/buffet, bar/tavern and fine-dining upscale restaurants. Restaurateurs who own and/or operate full-service family restaurants should, therefore, develop a wine list/menu, if absent, or ensure that details (i.e. taste descriptors, grape variety used to make the wine) are included on the wine list/menu to help diners in both involvement groups to make their purchasing decisions.

Future research should measure the amount of money spent on food within the dining group, as this will provide deeper insights into the “position” of wine as a product offering within restaurants by unravelling all permutations possible. Value will be added by examining the nature of the relationships between dining group members and wine involvement levels. This could include investigating solo dinners at restaurant bars/taverns which is a growing phenomenon in the US dining scene (Her and Seo, 2018). Last but not least, this research should be replicated in studies executed in other countries to determine whether the application of theory used in our study is also applicable cross-culturally.

References


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Increasing wine sales through customised wine service training – a quasi-experiment

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Abstract

Purpose – The selling of wines is usually performed by a sommelier in the context of an upmarket restaurant. However, many restaurants cannot afford to employ a sommelier and must rely on the food and beverage service personnel to assist customers with the selection of wine. The food and beverage service personnel are generally not qualified to do this. Restaurants usually do not provide training with regard to wine knowledge, wine service skills and wine selling skills. The purpose of this paper was to establish whether wine service training had an influence on the wine sales of a restaurant.

Design/methodology/approach – A quasi-experimental research design used two restaurants from the same franchise. One restaurant was the control group while the other was the experimental group. Wine sales were monitored and recorded for a period of three months, the second month being used for the training intervention of the experimental group.

Findings – Although the results were not statistically significant, the results indicated that wine service training increased the wine sales in the restaurant of the experimental group.

Originality/value – This study contributes to the literature in the South African hospitality sector and establishes that wine service training is a necessity for wine sales to explore further in the restaurant industry.

Keywords Restaurant, Experiment, Time series, Wine sales, Wine service

Paper type Research paper

Introduction

The primary research objective of the research was to establish whether wine service training had an effect on restaurant wine sales. Foxcroft (2009) observes that South Africa is not a wine drinking nation, and this is further confirmed by Green (2006), who states that South Africa is predominantly a beer drinking nation, as the volume of beer sold in 2014/2015 was 79.1 per cent of the market, while wine was only 8.2 per cent (Holtzkampf, 2015). South Africa is the eighth largest wine producing country in the world, but Australia, the seventh largest wine producing country (Wine Institute, 2014a), consumes three times more wine than South Africa (Wine Institute, 2014b). In 2015, wine consumption accounted for 11 per cent of total alcohol consumption in South Africa, while beer and spirits were 55 and 20 per cent, respectively (Wesgro, 2017). Further to this, Wesgro (2017) reported that per capita wine consumption increased from 6.98 l in 2014 to 7.73 l in 2015. To increase wine sales, both wine producers and wholesalers continually market their wines at wine shows and at restaurants by hosting wine and food evenings (Green, 2006). As a wine producing country, more should be done to promote the sale of wine. The potential to increase wine sales in a restaurant environment is possible; however, due to a lack of training of the food and beverage personnel to assist customers in making the more informed wine choices to accompany their meals, this will probably not occur (Fridjhon, 2017). The food and beverage
service personnel are perceived as poor status, low skilled workers in the restaurant industry (Baum, 2002). The personnel turnover in the restaurant industry is known to be very high, often in excess of 100 per cent (Wildes, 2005); thus, there is a reluctance to invest in training as the personnel might leave (Davies et al., 2001).

The only training that many food and beverage service personnel receive is during an induction programme when they start working in the restaurant and training updates are seldom done (Cairncross et al., 2008; Poulston, 2008). The majority of hospitality training is mainly on-the-job (Jameson, 2000), unstructured, done by experienced employees and is of a short duration (Clements and Josiam, 1995). The South African restaurant industry employs a large workforce (181,373 personnel) to provide the service of food and beverages (Statistics South Africa, 2007).

The South African Skills Development Act (Act 97 of 1998) and the Skills Development Act (No 9 of 1999) require businesses whose employee payroll exceeds R 500,000 per annum (the currency used in South Africa is the Rand, indicated by the symbol “R”) to pay a Skills Development Levy of 1 per cent of their employee payroll to the South African Revenue Service. These funds are distributed to the relevant Services Education and Training Authority, which in the case of the hospitality sector is the Culture, Arts, Tourism, Hospitality and Sport Sector Education and Training Authority (CATHSSETA). The CATHSSETA (2013, 2017) Sector Skills Plans reports that 96 and 95 per cent of the hospitality sub-sector registered enterprises, employing less than 50 people each, are owner managed, and that the owners play a major role in the day to day operations of their enterprises. Further to this, the majority of these enterprises do not have succession plans and are not required to submit Work Skills Plans and Annual Training Reports. The CATHSSETA (2013) Sector Skills Plan states that medium and large enterprises either have a human resource department or training programmes (sometimes both) and their employees receive regular industry-specific training through a variety of options such as in-service training, skills programmes or unit standards. These companies are obligated to pay the skills development levies and most claim mandatory grants back for the training that they have provided.

Many small businesses in the hospitality industry believe that their personnel are proficient and do not require training, and therefore, training is not a priority for their business (Galbraith and Bankhead, 2012), especially with regard to the participation in external training programmes. This is confirmed in the CATHSSETA (2013) Sector Skills Plan, which states that on-the-job training (OJT) in small businesses is very limited and concentrates only on the specific needs of the business and not the sector as a whole. Training by external providers is often regarded as unimportant, as many owner-managers remain sceptical of external training, as their own experience has been mainly from OJT (Becton and Graetz, 2001). During an economic downturn, training is sometimes seen as a luxury and is usually the first activity to suffer when budget cuts are made (Fitzpatrick, 2015).

**Literature review**

In most work places, the training takes place in a classroom or seminar environment, at either the workplace or off-site such as at hotels or conference venues. This is a common practice in large corporations; however, smaller businesses such as restaurants and bistros are unable to offer their personnel training in such an environment. In the majority of restaurants, new personnel are given a brief induction/training programme when they first start working in the restaurant, and this training is seldom repeated (Cairncross et al., 2008). The training they receive while performing their jobs, classified as OJT, is usually
unstructured and brief, and carried out by “experienced” employees (Clements and Josiam, 1995; Rothwell and Kazanas, 2004).

In smaller businesses, OJT is the most frequently used method for training and uses more experienced and skilled workers to train new employees (Blanchard and Thacker, 2004). This training can be supplemented by classroom training with an external trainer. There are, however, some disadvantages to OJT (Blanchard and Thacker, 2004; Jacobs and Jones, 1995). Blanchard and Thacker (2004) identified these as follows: not prepared; done on an ad hoc basis; the absence of clear goals; trainers not having the ability to train; and trainers not having any formal training on how to do training. The advantage of OJT is that it can be cost-effective and take place when work activity is low. It is important that while OJT takes place, it affects neither the productivity in the workplace (Versloot et al., 2001) nor the customer. OJT programmes must be carefully planned, updated and improved (Rothwell and Kazanas, 2004). For this training to be effective, it is vital that employees are assisted in learning how to learn (Rothwell and Kazanas, 2004). The development of training programmes relies on educational objectives.

The employment of a sommelier in South African restaurants is a recent development; consequently, most wine sales are performed by the food and beverage service personnel (Fridjhon, 2017). According to Manske and Cordua (2005), wine sales by sommeliers are greater when compared to restaurants where no sommeliers/wine waiters are employed. To provide good or even exceptional service, food and beverage service personnel in restaurants should be aware of the wines on offer, the best wine and food pairings, how to serve the wines, specialised techniques, correct glassware, wine temperatures and suitable substitutes (Gustafsson et al., 2006).

**Wine and food pairing – traditional pairings vs consumer taste preferences**

Apfel (1998) recommends that wine service personnel should not only obtain wine knowledge but also should taste the wines that they are expected to sell. Caparoso (1995) further advises that if restaurants invest in wine service training, the profit of the restaurant will increase, as well as the quality of the service. LaVilla (2010) states that there are two different approaches to food and wine pairing, one being to match the wine ordered with various menu items and the other being the reverse, namely, selecting a wine to match the menu items ordered. Differing perspectives on food and wine pairing have developed as a result of cultural influences. Harrington (2008) illustrates the difference between the French and American approach to wine pairing. The French approach dictates that the rules of food pairing are rigidly observed, while the American approach it too drink whatever is preferred.

Although the pairing of food and wine is a personal taste, the interaction of wine with food led to the development of traditional guidelines for matching food and wine (Harrington, 2005). Traditionally white wine was deemed suitable for being served with fish and white meat, whereas red wine, being more full-bodied, was matched with red meat (Harrington and Seo, 2015; Goldstein and Goldstein, 2006; Simon, 1997). These traditional guidelines also recommended that dry wines should be served before sweeter wines and younger wines served before older vintages (Robinson, 1999, p. 500; Walton, 1996, pp. 10-15). Although these were good guidelines for selecting a wine to accompany food, the range of wines that are available to the public has become large and extremely varied. To match wine and food more correctly, traditional schools of thought believe it is essential that the elements of weight, flavour intensity and the five primary taste sensations and other factors are taken into consideration (Van Niekerk and Burke, 2009).
The Ascend Wine Training Programme (Dewald and Jones, 2007) and the vinotype approach (Hanni, 2013) can be classified as the modern approach to wine sales. The Ascend Wine Training Programme approach is similar to that recommended by Hanni, in that it matches the wine preference to the customer and not the food. The first step in the Ascend Wine Programme recommends that wine servers enquire whether the customers will be having any wine, and then present the wine list for them to see which wine the establishment has to offer. The wine servers are then required to determine the preferred wine style of their customers, and only then to recommend specific wines that would suit the customer’s preferred wine style. The approach that Hanni (2013) advises is different, in that he asserts that people are divided into four vinotypes, namely, sweet, hypersensitive, sensitive and tolerant. The vinotype approach determines the preferences of the customer that have been shaped by genetics and tasting experiences. Hanni further believes that sommeliers should adopt the vinotype approach to wine recommendations as opposed to the traditional guidelines that have been developed through the pairing of wine and food. Hanni advises that sommeliers must ensure that the wines they have suggested have the basic flavour elements that would suit the personal preferences of the customers, avoid serving the wines with a menu items that makes the wine taste less pleasant and try to serve that wine with a menu item that will make the wine taste even more pleasant. Both of these approaches require the wine servers to be more engaging with the customer and to make the service interaction more personalised.

**Sales techniques and strategies**

Wansink *et al.* (2006) state that there is too great emphasis on food and wine pairing and wine knowledge, and not enough emphasis on teaching wine sales techniques (Dewald, 2008). Lillicrap and Cousins (2006, pp. 26-28) discuss product knowledge and sales ability as some of the characteristics that should be displayed by the food and beverage personnel. These imply that a food and beverage service person should be seen as a salesperson, and therefore, the food and beverage service person should be trained in various wine sales techniques and strategies. Adaptive, persuasive and suggestive selling are techniques, which the literature discusses.

Adaptive selling is where the salesperson varies his/her sales approach to the customer’s needs and wants. This links with the modern approach advocated by Dewald and Jones (2007) and Hanni (2013). In the case of wine sales, this could be a result of uncertainty on the part of the customer. Sharma (2001) identifies three behaviour classifications that are demonstrated by salespeople that have an effect on customer decision-making and persuasion, namely, customer orientation, salesperson credibility and salesperson accuracy. Manske and Cordua (2005) infer that wine service personnel can have both direct and indirect influence on the sale of wine in a restaurant. In the direct influence, the credibility and selling technique of the wine server plays a role in finalising the sale, while the indirect influence is a result of training that the wine server has received.

There are three aspects to salespeople’s customer orientation, namely, empathy, affect and availability. Empathy implies that the salesperson is able to identify with the emotions and feelings of the customer, experiencing the sales process from the customer’s point of view. This display of empathy towards the customer (when the feeling towards the product or service is positive) makes the customer feel that the salesperson has their interests at heart and will result in the customer being positively affected. This enhances the chance of persuading the customer to select the product or service. Customer persuasion is further enhanced by the availability of the salesperson to assist the customer in the selection of the product or service.
The credibility of a salesperson has been shown to have a direct effect on the customer when evaluating a product or service and influences the customer’s intention to purchase the product or service. Credible salespeople have the ability to minimise the consumer’s doubt, thus increasing the possibility of a sale. The perception of a customer’s needs and wants has to be accurately interpreted by a salesperson. Sharma (2001) suggests that salespeople should be trained to adapt with different classes of customers and their needs and taught a range of sales techniques, while their listening skills should be enhanced to improve their accuracy when assessing their customers’ needs.

Manske and Cordua (2005) suggest that to make adaptive selling effective, three essential skills are required, namely, learning orientation, questioning ability and product knowledge. Learning orientation can only be successful when the salesperson learns about the product or the service that he/she is selling and about the customer that will purchase the product or service. To establish the needs and wants of the customer, the salesperson should enhance his/her questioning ability, as this will assist in asking the customer the correct questions when establishing their needs. The last skill, namely, product knowledge, is regarded as being vital to the adaptive selling process, as a thorough knowledge of the product or service will make the salesperson appear confident and, therefore, more credible when making recommendations.

Persuasive selling (Manske and Cordua, 2005) is a sales technique that is contrary to adaptive selling, as the starting point is the salesperson’s superior knowledge of the product or service, as well as the needs of the customer. In this situation, the salesperson is in a position to inform the customer of the most suitable product or service and persuades them to accept the recommendation.

According to Gultek et al. (2006), suggestive selling is a technique, whereby the salesperson attempts to bring certain products or services to the customers’ attention to increase the sales of that specific product or service. In a 1987 study, which was conducted by Ralis and O’Brien, as reported in Gultek, et al. (2006), it was found that suggestive selling by food and beverage service personnel had a major effect on restaurant wine sales. Wine sales had doubled during the period when suggestive selling was used in the restaurant.

Although the marriage of wine and food is an important consideration, it is even more important in the food and beverage industry that the customer experience is memorable. Therefore, any wine service training should include wine and food knowledge and sales techniques to enhance sales. This gives the food and beverage service personnel the confidence to talk to the customer when determining their wine style preference and then recommending suitable wines from the wine range that is offered in the restaurant.

**Methodology**

The primary objective of the research was to establish whether wine service training had an effect on restaurant wine sales (monetary value in South African Rand currency units). For this purpose, a multiphase design (Cresswell and Plano Clark, 2011) was used incorporating qualitative and quantitative data. In total, 280-seat franchise restaurants (Ocean Basket, 2016) were used in the experiment, where the food and beverage personnel of the control restaurant received no training. Both restaurants are classified as small businesses as the employ more than 21 but less than 51 employees (South Africa, 2004). The owners of the franchise were approached to allow the researcher to implement the proposed research (Figure 1). They willingly agreed and provided the wine sales data as a Rand value (not type and number of bottles of wine sold) for the duration of the research from the two Ocean Basket restaurants used in this quasi-experiment. The two researched restaurants are part of the same franchise, sell the same food selections and offer the same wine lists to
customers. One restaurant was randomly selected as the control (would receive no training) and second to apply the training intervention. As it can be seen in Figure 1, there were three study phases to this design. This was considered a time series design (Wludyka, 2011) as the researcher recorded the individual daily wine sales in Rands (South African Currency) of all the food and beverage personnel serving in each of the two restaurants for the duration of the experiment. This was used to determine whether the training intervention had an effect on the experimental restaurant group’s ability to use its new wine knowledge to drive up the value of wines selected by customers to accompany a meal.

Study Phase 1 determined, first, the wine best-practice knowledge recommended in theory and academic empirical research reviewed in this article’s literature, as regards service and selling skills required of the food and beverage service personnel. Study Phase 2 determined, second, the pre-training wine knowledge, service and selling skills by quantitative surveys undertaken with each staff member by the researcher at each of the two restaurants. The data from Study Phases 1 and 2 were comparatively analysed and used to develop the intervention programme for the experimental group of the food and beverage service personnel within one of the two restaurants (the analysis of primary data resulting from both the intervention restaurant and the non-intervention restaurant, constitutes part of the analyses in Study Phase 3).

Finally, Study Phase 3 was quantitative in nature capturing and collating figures for Rand value wine sales made by each staff member at each of the two restaurants over the 12-week experiment period. The researcher (a diploma graduate of the Cape Wine Academy and university lecturer in food and beverage studies) customised the wine service training to food and wine offerings of the franchise.

Study Phase 3 was divided into three sales periods of four weeks each, a total of 12 weeks over which data of sales and Rand value were collected for each of the two restaurants. Sales Period 1 was for the collection of these data before implementation of the training at both restaurants, while Sales Period 2 was for the duration of the training at one restaurant while at the other restaurant it was monitored, but without the training intervention. Sales Period 3 was used by the researcher to monitor the wine sales for four weeks after the completion of the training at the restaurant with training and the one without.

There were four weekly training sessions of 2.5 h, each for the intervention group. The first training session demonstrated the wine tasting procedure, the causes and effects of various taste sensations on the palate and their interaction with three different wine styles. This tasting demonstrated how sweetness, acidity, saltiness, bitterness and Umami can affect (positively or negatively) the flavours of the wine. The food and beverage service personnel were taught the correct way to taste and assess wine, as well as to recognise tasting faulty wines (oxidised and corked wines). The second training session dealt with the production of white wines and the various grape varieties that are used to create a range of wine styles. All the wines that were used in the training modules were selected from the restaurant wine list. Training session three was devoted to both red wines and sparkling wines and session four dealt with wine and food pairing and sales techniques used to sell wines in a restaurant environment. The chosen wines were served with a small selection of

Figure 1.
The three phase design
food items from the restaurant menu. The reasons why some wines match some of the menu items and other wines are not, were demonstrated and discussed.

Research results
At the commencement of the study, a questionnaire was administered to the food and beverage service personnel in each restaurant. The questionnaire comprised two sections. The first section required demographic details pertaining to gender, race, age, education, work experience, wine consumption and wine service training. The second section examined the current wine knowledge of all the participants. This was done to develop a wine service training programme for the quasi-experiment. The data of the questionnaire are analysed below.

Demographic profile of subjects (the food and beverage service personnel)
The control group consisted of four females and six males, whereas the intervention group comprised two females and six males (Table I). The age of female personnel

<table>
<thead>
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<th>Control group</th>
</tr>
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<tr>
<td>Subjects</td>
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</tr>
<tr>
<td>2 Females</td>
<td>4 Females</td>
</tr>
<tr>
<td>6 Males</td>
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<table>
<thead>
<tr>
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<tbody>
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</tr>
<tr>
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</tr>
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<td>28-28 years</td>
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<tr>
<td>Males</td>
<td>Mean</td>
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<tr>
<td>Median</td>
<td>33.50</td>
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</tr>
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<td>25-43 years</td>
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<td>Females</td>
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<tr>
<td>Mean</td>
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<tr>
<td>Median</td>
<td>Median</td>
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<td>Mode</td>
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<tr>
<td>Range</td>
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<td>0.67-6.00 years</td>
<td>1.25-7.00 years</td>
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<tr>
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<td>Median</td>
<td>Median</td>
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<td>2.00-9.58 years</td>
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<table>
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<td>Females</td>
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<td>Males</td>
<td>Males</td>
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<td>Mean</td>
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<tr>
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<td>Females</td>
</tr>
<tr>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>Males</td>
<td>Males</td>
</tr>
<tr>
<td>4</td>
<td>3</td>
</tr>
</tbody>
</table>

Table I. Demographics (ethnicity, wine consumption and previous training)
ranged between 21 and 35 years and that of the male personnel ranged between 23 and 43 years. The range of work experience in years for female personnel members was 1.25-7.00 years for the control group and 0.67-6.00 years for the intervention group. The male personnel members were from 2.00 to 9.58 years for the control group (Table I). This Table also shows that the subjects in the intervention group were all black, whereas the control group comprised 80 per cent black and 20 per cent white subjects. Further to this, none of the female subjects drank wine, while the average wine consumption amongst the male subjects was only 2.33-2.67 glasses of wine per month. Of all the participants, only nine had some wine service training. This was in the form of OJT. None of the subjects had any formal wine qualifications from wine training service providers such as the Wine Spirit and Education Trust and the Cape Wine Academy.

A wine knowledge questionnaire was administered at the beginning of the study to determine the wine knowledge of the participants in each group. The analysis of the data from this questionnaire was used to develop the training intervention of the experimental group. The wine knowledge questions were classified into six knowledge areas, each with two levels (knowledge and comprehension and application and advanced knowledge). The questionnaire was developed in line with the categories of the cognitive domain of Bloom’s taxonomy, namely, knowledge, comprehension, application, analysis, synthesis and evaluation (Anderson and Krathwohl, 2001). A breakdown of the questionnaire is shown in Table II. The knowledge areas covered in the questionnaire include winemaking, wine styles, tastes/aromas, food and wine pairing, selling and service and alcohol awareness. There was no significant difference in the wine knowledge of the control and experimental groups. Further to this, there was no significant difference between the wine knowledge and previous training.

**Wine knowledge scores: control group vs training intervention group**

An independent-sample t-test was conducted to compare the wine knowledge scores for both the control group (CG) and the training intervention group (TIG) (Tables III and IV). There was no significant difference in the wine knowledge scores for the control group (M = 35.50, SD = 8.644) and the training intervention group (M = 39.38, SD = 8.634; \( p = 0.358 > 0.05 \) significance level).

<table>
<thead>
<tr>
<th>Knowledge area</th>
<th>Knowledge and comprehension</th>
<th>Application and advanced knowledge</th>
<th>No. of questions</th>
<th>Total Question weight (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Question no.</td>
<td>Question weight (%)</td>
<td>Question no.</td>
<td>Question weight (%)</td>
</tr>
<tr>
<td>Winemaking</td>
<td>4, 11 and 17</td>
<td>15</td>
<td>2, 10 and 12</td>
<td>15</td>
</tr>
<tr>
<td>Wine style</td>
<td>1, 8</td>
<td>10</td>
<td>16</td>
<td>5</td>
</tr>
<tr>
<td>Tastes/Aromas</td>
<td>3</td>
<td>5</td>
<td>0</td>
<td>1</td>
</tr>
<tr>
<td>Food and wine pairing</td>
<td>0</td>
<td>9, 15 and 18</td>
<td>15</td>
<td>3</td>
</tr>
<tr>
<td>Selling and serving</td>
<td>5, 13</td>
<td>10</td>
<td>6, 7, 19 and 20</td>
<td>20</td>
</tr>
<tr>
<td>Alcohol awareness</td>
<td>14</td>
<td>5</td>
<td>0</td>
<td>1</td>
</tr>
</tbody>
</table>

**Table II.**

Wine knowledge questionnaire
Wine knowledge scores vs previous wine service training

A second independent-sample *t*-test was conducted to compare the wine knowledge scores and previous training that the food and beverage service personnel had received prior to implementation of the training intervention (Tables V and VI). There was no significant difference in the wine knowledge scores for the food and beverage personnel, who had received prior training (M = 38.89, SD = 7.817) and the food and beverage service personnel who had not received any prior training (M = 35.56, SD = 9.501; *p* = 0.428 > 0.05 significance level).

### Table III. Group statistics (wine knowledge scores – CG vs TIG)

<table>
<thead>
<tr>
<th>Group</th>
<th>N</th>
<th>Mean*</th>
<th>SD</th>
<th>Standard error mean</th>
</tr>
</thead>
<tbody>
<tr>
<td>Control group</td>
<td>10</td>
<td>35.50</td>
<td>8.644</td>
<td>2.734</td>
</tr>
<tr>
<td>Experimental group</td>
<td>8</td>
<td>39.38</td>
<td>8.634</td>
<td>3.053</td>
</tr>
</tbody>
</table>

Notes: *t*(16) = 0.946; *p* = 0.36; non-significant at *p* < 0.05

### Table IV. Group statistics (wine knowledge scores vs previous wine service training)

<table>
<thead>
<tr>
<th>Training</th>
<th>N</th>
<th>Mean</th>
<th>SD</th>
<th>Standard error mean</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yes</td>
<td>9</td>
<td>38.89</td>
<td>7.817</td>
<td>2.606</td>
</tr>
<tr>
<td>No</td>
<td>9</td>
<td>35.56</td>
<td>9.501</td>
<td>3.167</td>
</tr>
</tbody>
</table>

Notes: *t*(16) = 0.813, *p* = 0.43; non-significant at *p* < 0.05

### Table V. Descriptives (wine knowledge scores vs educational level)

<table>
<thead>
<tr>
<th>Group</th>
<th>N</th>
<th>Mean*</th>
<th>SD</th>
<th>Standard error</th>
<th>95% Confidence interval for mean</th>
<th>Minimum</th>
<th>Maximum</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>Lower bound</td>
<td>Upper bound</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>G11 or lower</td>
<td>4</td>
<td>32.50</td>
<td>8.660</td>
<td>4.330</td>
<td>18.72</td>
<td>46.28</td>
<td>25</td>
</tr>
<tr>
<td>G12</td>
<td>8</td>
<td>38.75</td>
<td>9.910</td>
<td>3.504</td>
<td>30.46</td>
<td>47.04</td>
<td>20</td>
</tr>
<tr>
<td>Post Matric/ Diploma/Certificate</td>
<td>6</td>
<td>38.33</td>
<td>6.831</td>
<td>2.789</td>
<td>31.16</td>
<td>45.50</td>
<td>30</td>
</tr>
<tr>
<td>Total</td>
<td>18</td>
<td>37.22</td>
<td>8.613</td>
<td>2.030</td>
<td>32.94</td>
<td>41.51</td>
<td>20</td>
</tr>
</tbody>
</table>

Notes: *f* = 0.755, *p* = 0.49; non-significant at *p* < 0.05

### Table VI. Average wine sales (Periods 1, 2 and 3) for the control and training intervention groups

<table>
<thead>
<tr>
<th></th>
<th>Period 1</th>
<th>Average wine sales</th>
<th>Period 3</th>
</tr>
</thead>
<tbody>
<tr>
<td>Control group</td>
<td>R 6.46</td>
<td>R 7.18</td>
<td>R 6.51</td>
</tr>
<tr>
<td>Experimental group</td>
<td>R 7.01</td>
<td>R 8.44</td>
<td>R 8.04</td>
</tr>
</tbody>
</table>

Wine service training
Wine knowledge scores vs educational level

A one-way analysis of variance (ANOVA) between-groups ANOVA was conducted to explore the impact of education level, as measured by the wine knowledge scores (Tables VII and VIII). Participants were divided into three groups in respect of their education level (Group 1: Grade 11 or lower; Group 2: Grade 12; Group 3: post matric/certificate/diploma). There was no statistically significant difference for the wine knowledge scores in terms of the three educational levels, as indicated by the \( p \)-value = 0.487 > 0.05 significance level.

In Study 3, the daily wine sales and the number of customers who were served by each food and beverage server were recorded and totalled. The weighted average of wine sold per customer for each food and beverage server was calculated. The total wine sales and customers per restaurant were used to calculate the weighted average wine sales (AWS) per customer. The wine sales data were collected from three equal time periods, each consisting of four weeks.

The first wine sales data collection period took place after the administration of the demographic and wine knowledge questionnaire, but prior to the commencement of the training intervention. The second wine sales data collection occurred during the four-week training intervention, after which the wine knowledge of the food and beverage service personnel (intervention group) was tested again, using the same questionnaire. The final wine sales data collection took place once the training intervention was completed.

The pre- and post-test wine knowledge questionnaires of the training intervention group were compared by using a paired sample \( t \)-test. The dependent variable for the rest of the analysis was the AWS calculated per customer served by the food and beverage server. The following independent variables were also used and compared to the wine sales:

- the control group (CG) and the training intervention group (TIG);
- gender;
- age;
- education;
- wine consumption; and
- experience, education and language.

### Table VII.
AWS per restaurant (differences and % change)

<table>
<thead>
<tr>
<th></th>
<th>Differences in AWS per restaurant and % change</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Weighted average Periods 1-2 Periods 2-3 Periods 1-3</td>
</tr>
<tr>
<td>Intervention group</td>
<td>+R 1.43 20.39% -R 0.41 -4.85% +R 1.03 +14.69%</td>
</tr>
<tr>
<td>Control group</td>
<td>+R 0.72 +11.15% -R 0.67 -9.33% +R 0.05 +0.77%</td>
</tr>
</tbody>
</table>

### Table VIII.
Control group wine, beverage and food sales for periods 1, 2 and 3

<table>
<thead>
<tr>
<th>Period</th>
<th>Wine Sales (Rands)</th>
<th>Beverage Sales (Rands)</th>
<th>Food Sales (Rands)</th>
<th>Average spend per person (Rands)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Wine</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>R</td>
</tr>
<tr>
<td>Period 1</td>
<td>R 28,533.70</td>
<td>R 65,203.80</td>
<td>R 322,808.70</td>
<td>R 6.46</td>
</tr>
<tr>
<td>Period 2</td>
<td>R 36,671.60</td>
<td>R 83,820.20</td>
<td>R 373,994.60</td>
<td>R 7.18</td>
</tr>
<tr>
<td>Period 3</td>
<td>R 32,588.30</td>
<td>R 71,313.40</td>
<td>R 360,837.90</td>
<td>R 6.51</td>
</tr>
<tr>
<td>Total</td>
<td>R 97,793.60</td>
<td>R 220,337.40</td>
<td>R 1,057,641.20</td>
<td>R 6.73</td>
</tr>
</tbody>
</table>
The results of the quasi-experimental study indicated that statistically there was no relationship between the dependent variable (wine sales) and the independent variables (age, gender, education, experience, language and previous training). Although results indicated that there was no significant statistical difference in wine sales between the control group and the intervention group, it can be seen in Table IX and Figure 2 that there was a difference between these two groups. The differences are discussed below.

During Period 1 the difference between the groups was R 0.55 with the training intervention group having the higher average spend on wine per customer. The difference between the two groups increased to R 1.26 in Period 2 and to R 1.53 in Period 3.

ANOVA percentages in Table X reveal that the intervention group experienced a variance of 20.39 per cent for Periods 1-2, while the control group experienced a positive variance of 11.15 per cent. The increase in average spend on wine per customer for Period 2 could be as a result of the provincial schools being on holiday during this time. Both restaurants experienced a negative variance of 6.62 per cent for the intervention group and 9.33 per cent for the control group. For the full duration of the data collection period, the

<table>
<thead>
<tr>
<th>Period</th>
<th>Wine Sales (Rands)</th>
<th>Average spend per person (Rands)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Wine Rands</td>
<td>Beverage Rands</td>
</tr>
<tr>
<td>Period 1</td>
<td>R 15,625.70</td>
<td>R 42,171.00</td>
</tr>
<tr>
<td>Period 2</td>
<td>R 21,817.80</td>
<td>R 58,850.70</td>
</tr>
<tr>
<td>Period 3</td>
<td>R 20,040.70</td>
<td>R 48,808.00</td>
</tr>
<tr>
<td>Total</td>
<td>R 57,484.20</td>
<td>R 149,829.70</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Period</th>
<th>Total sales</th>
<th>Assumed total cost of sales</th>
<th>Assumed contribution margin</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sales period 1</td>
<td>R 17,101.30</td>
<td>R 8,046.16</td>
<td>R 9,055.14</td>
</tr>
<tr>
<td>Sales period 2</td>
<td>R 24,533.60</td>
<td>R 11,543.06</td>
<td>R 12,990.54</td>
</tr>
<tr>
<td>Sales period 3</td>
<td>R 21,671.70</td>
<td>R 10,196.53</td>
<td>R 11,475.17</td>
</tr>
</tbody>
</table>

**Figure 2.**
AWS per restaurant for periods 1, 2 and 3

**Table IX.**
Experimental group wine, beverage and food sales for periods 1, 2 and 3

**Table X.**
Assumed contribution margins for sales periods 1, 2 and 3
intervention group achieved a positive variance of 14.69 per cent, while the variance of the control group was negligible at 0.77 per cent.

Discussion

The data have statistically proven that the independent variables (gender, age, experience, language, race, education and previous training) had no influence on wine sales in the restaurants. The training intervention group showed a statistically significant increase in their wine knowledge. From this, it can be concluded that the performance of the training intervention group (an increase of 14.69 per cent in average spend per customer on wine) is a result of the training intervention programme.

Although the focus of the quasi-experiment was on the sales of wine and not of the food and other beverages, the total sales figures for the three periods were recorded for food and beverage sales as well. These sales figures can be seen in Tables XI and XII.

The data from Tables XI and XII indicate that the control group restaurant had double customers of the restaurant of the control group. The sales percentages of wine, beverage and food are very similar for both restaurants, the control group being 7.11 per cent, (wine) 16.02 per cent (beverage) and 76.88 per cent (food) and the experimental group being 6.66 per cent, (wine) 17.36 per cent (beverage) and 75.99 per cent (food). The experimental group has a higher spend per person across all three categories. It is important to note that the control group had one more staff member than the experimental group. The data indicate that the control group service personnel had to serve twice as many customers compared to the experimental group. The control group had a lower spend per customer in all three categories.

The differences in number of customers can be attributed to the location of the restaurants and possibly the understaffing of the control restaurant. The service personnel of the control group restaurant, experiencing double the volume in customers, this implies that they would have less time to spend with the customer during the same time period as the experimental group’s service personnel, thus affecting the average sales of wine, beverages and food per customer. The control group restaurant is situated in a shopping centre in an established middle-income suburb while the experimental group restaurant is situated in a shopping centre in a developing suburb that is being developed for a higher income population. There are approximately 20 restaurants/fast food establishments within a 1 km radius of the control group restaurant, while the experimental group restaurant only has 4. Both restaurants cater to families, resulting in a higher average spend for beverages when compared to wine sales.

As this study focussed on the selling of wine, it is important to determine whether there is a return on the investment in training. Using the cost-based pricing method, the difference between the cost and the selling price of the wine would be the contribution margin (Dopson and Hayes, 2011, pp. 251-255; Harris, 1999, pp. 87-89). The contribution margin, when a restaurant is profitable, will cover the labour (salaries, wages, benefits and compulsory deductions) and overhead costs (rental, water, electricity and other expenses) of the operation, with the balance being the pre-tax profit. The cost of sales percentage of some of the wines that were sold in the restaurant varies from 35.43 to 47.05 per cent. However, the average cost of sales percentage for wine was not calculated by the restaurant, so the following assumptions were made for analyses of the increase in average spend on wine per customer:

- The cost of sales percentage is calculated at the maximum of 47.05 per cent.
- There are no extra labour and overhead costs that are associated with the sale of the wines during the experimental period.
Table XI shows that the contribution margin variances for Sales Periods 2 and 3 were calculated against the contribution margin of Sales Period 1. The contribution margin variance between Sales Periods 1 and 2 is R 3,935.40 and the contribution margin variance between Sales Periods 1 and 3 is R 2,420.03. The total increase in the contribution margins is R 6,355.43 and, therefore, an increase in the restaurant’s profit. The resultant increase in profit, therefore, justifies investing in the training of the food and beverage service personnel in wine knowledge, service skills and selling skills.

The franchise restaurants buy all their wines from two major wine wholesale companies. Both wine companies offer on-site training of their wines at no cost to the restaurant. This training is done by wine sales representatives and concentrates on the characteristics of their wines on the franchise wine list. Many of these sales representatives have only had basic training in wine, and very little training in the food and beverage service or wine selling techniques. It is only recently that the one company has engaged the services of an internationally trained sommelier to oversee the wine training of their sale representatives.

The investment in training should be encouraged, as the training of the personnel will result in increased sales, a better customer experience and a greater profit for the establishment. Gultek et al. (2006) state that the amount of wine service training that was offered to service staff in a restaurant resulted in increased wine sales. This correlates with a study by Russell et al. (1985) who found that training correlated with sales performance.

Practical implications and future research recommendations
The academic literature on wine service training in the South African food and beverage service industry is limited. Further research into wine service training and its effects will assist to improve the standard of wine service within the full-service restaurant industry.

This research used 280-seater franchise restaurants that specialised in seafood. The research was limited to the city of Pretoria in the province of Gauteng where the two restaurants are geographically located. Statistically the results were not significant, because the sample size was not large enough. This research was however exploratory and attempted to draw attention to the need for more research as little empirical evidence on which to build South African wine training exists in current academic literature as regards improving wine sales. Improving local wine sales could result in increased contribution of wine to gross domestic product figures. Additionally, training improves the skills of the unskilled staff making them more employable hopefully with improved remuneration in the South African hospitality industry. This study should be expanded to the rest of the Gauteng province where the franchise has numerous restaurants, and if possible to the rest of South Africa to gather more information on what training improves wine sales. If this research is expanded to include more restaurants, the results might be statistically significant. Another factor to consider is that this research only recorded the value of the wine sales and not the amount of wine sold. The increased wine sales could have been a result of either more wine sold (number of bottles/glasses) or the selling of higher priced wines. If at all possible, further research should include both.

References


Further reading


Republic of South Africa (1999), “Skills development levies act (No. 9 of 1999)”.

Republic of South Africa (2003), “National small business amendment act (No. 29 of 2004)”.  

43
**Appendix**

**PLEASE ANSWER THE FOLLOWING QUESTIONS BY CROSSING (x) THE RELEVANT BLOCK OR WRITING DOWN YOUR ANSWER IN THE SPACE PROVIDED.**

**EXAMPLE of how to complete this questionnaire:**

<table>
<thead>
<tr>
<th>Your gender?</th>
<th>Male</th>
<th>1</th>
</tr>
</thead>
<tbody>
<tr>
<td>If you are female:</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Section A – Background information**

This section of the questionnaire refers to background or biographical information. Although we are aware of the sensitivity of the questions in this section, the information will allow us to compare groups of respondents. Once again, we assure you that your response will remain anonymous. Your co-operation is appreciated.

1. Name

2. Which restaurant are you employed at?
   - Waverley 1
   - Zambezi Mall 2

3. Gender
   - Male 1
   - Female 2

4. Age (in complete years)

5. Ethnicity
   - Black 1
   - White 2
   - Coloured 3
   - Indian or Asian 4

6. What is your home language?
   - English 1
   - Afrikaans 2
   - Zulu 3
   - Xhosa 4
   - Southern Sotho 5
   - Tswana 6
   - Northern Sotho 7
   - Tsonga 8
   - Venda 9
   - Swati 10
   - Ndebele 11
   - Other: Please specify

7. Your highest educational qualification?
   - Grade 11 or lower (std 9 or lower) 1
   - Grade 12 (Matric, std 10) 2
   - Post-Matric Diploma or certificate 3
   - Baccalaureate Degree(s) 4
   - Post-Graduate Degree(s) 5

8. Restaurant experience (years and months, i.e., 1 year, six months)

9. Personal wine consumption
   - Glasses of wine (125ml) Quantity
   - Per month

10. Have you had any wine training?
    - Yes 1
    - No 2

11. If yes, please indicate the nature of the training
    - Cape Wine Academy Course 1
    - WSET Course 2
    - On the job training course 3
    - Other: Please specify 4

(continued)
Section B

This section of the questionnaire explores your knowledge of wine.

Please indicate the correct answer for each of the following questions:

1. Which of the following is a basic definition of wine?
   - A cork-finished wine
   - A fermented juice blend of several grape varieties
   - Named for a specific vineyard
   - 75% or more of a specific grape variety

2. When ageing wine in barrels, the preferred wood is:
   - Cherry
   - Pine
   - Kniaat
   - Oak

3. The term “finish” is a wine term, which relates to:
   - Acidity
   - Aftertaste
   - Structure
   - Sweetness

4. Tannin is normally associated with the following wine styles:
   - Shiraz
   - Sauvignon Blanc
   - Riesling
   - Chenin Blanc

5. When selling a product, describing a characteristic tells the customer:
   - A product’s positive feature or characteristic
   - The selling price of the product
   - What the product can do for the customer
   - How the product will satisfy their needs

6. The best way to allow a wine to “breathe” is to:
   - Leave the wine in the opened bottle
   - Open the wine and recock the bottle
   - Pour the wine into a glass or a decanter
   - Store the bottle on its side

7. Before serving a wine the waiter should:
   - Check the appearance of the bottle and wipe it clean
   - Present the cork to the customer
   - Pour a little wine for the customer to taste
   - Shake the bottle to ensure that the alcohol is evenly mixed

8. Which of the following grape varieties make a white wine?
   - Merlot
   - Riesling
   - Shiraz
   - Pinot Noir

9. Which of the following wines would be best suited to Cajun-style calamari?
   - Graça
   - Robertson Winery Natural Sweet
   - J C Le Roux Le Domaine
   - Ocean Basket Dry White

10. In South Africa the sugar content in the grape berry is measured in:
    - Tannin
    - Volatile acidity
    - Bouquet
    - Degree Balling

11. Which of the following taste components is not detected in wine?
    - Bitterness
    - Sourness
    - Sweetness
    - Saltiness

(continued)
12. The acidity in wine (citric, tartaric or malic) contributes to its:

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Aroma</td>
<td>1</td>
</tr>
<tr>
<td>Bouquet</td>
<td>2</td>
</tr>
<tr>
<td>Sweetness</td>
<td>3</td>
</tr>
<tr>
<td>Flavour</td>
<td>4</td>
</tr>
</tbody>
</table>

13. The best time to take a wine order is when guests:

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Are served their starter</td>
<td>1</td>
</tr>
<tr>
<td>Request the wine list</td>
<td>2</td>
</tr>
<tr>
<td>Order their meal</td>
<td>3</td>
</tr>
<tr>
<td>Are served their main course</td>
<td>4</td>
</tr>
</tbody>
</table>

14. A factor that can be a major influence on alcohol consumption, which may result in intoxication, is:

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Type of alcoholic beverage</td>
<td>1</td>
</tr>
<tr>
<td>Time of day</td>
<td>2</td>
</tr>
<tr>
<td>Type of foods consumed</td>
<td>3</td>
</tr>
<tr>
<td>Body weight of the person</td>
<td>4</td>
</tr>
</tbody>
</table>

15. When serving wine with food, a Rosé/Blanc de Noir wine is a better match for:

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Deep fried chicken</td>
<td>1</td>
</tr>
<tr>
<td>Lasagne</td>
<td>2</td>
</tr>
<tr>
<td>Chicken salad</td>
<td>3</td>
</tr>
<tr>
<td>Roast beef</td>
<td>4</td>
</tr>
</tbody>
</table>

16. A wine that is labelled with the name of the dominant grape variety that is used to produce the wine is:

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
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</tr>
</thead>
<tbody>
<tr>
<td>A fortified wine</td>
<td>1</td>
</tr>
<tr>
<td>An estate wine</td>
<td>2</td>
</tr>
<tr>
<td>A premium wine</td>
<td>3</td>
</tr>
<tr>
<td>A varietal wine</td>
<td>4</td>
</tr>
</tbody>
</table>

17. The tannins found in a red wine come mainly from:

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Grape juice</td>
<td>1</td>
</tr>
<tr>
<td>Addition by the winemaker</td>
<td>2</td>
</tr>
<tr>
<td>Skins and stems of the grape bunch</td>
<td>3</td>
</tr>
<tr>
<td>Wooden barrels</td>
<td>4</td>
</tr>
</tbody>
</table>

18. A buttery chardonnay is a good food-wine combination with:

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Roast beef</td>
<td>1</td>
</tr>
<tr>
<td>Chilli con carne</td>
<td>2</td>
</tr>
<tr>
<td>Grilled kingklip</td>
<td>3</td>
</tr>
<tr>
<td>Baklava</td>
<td>4</td>
</tr>
</tbody>
</table>

19. When opening a bottle of wine that is sealed with a cork, the cork should be:

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Handed to the guest to smell</td>
<td>1</td>
</tr>
<tr>
<td>Put in a wine bucket/cooler</td>
<td>2</td>
</tr>
<tr>
<td>Sniffed by the waiter</td>
<td>3</td>
</tr>
<tr>
<td>Placed on a side plate on the table</td>
<td>4</td>
</tr>
</tbody>
</table>

20. When serving a sparkling wine, the wine should be served:

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>At 18°C Celsius (room temperature)</td>
<td>1</td>
</tr>
<tr>
<td>At 12 - 14°C Celsius (chilled)</td>
<td>2</td>
</tr>
<tr>
<td>At 6 - 8°C Celsius (very cold)</td>
<td>3</td>
</tr>
<tr>
<td>At 10 - 12°C Celsius (cold)</td>
<td>4</td>
</tr>
</tbody>
</table>
About the author

Arthur Donald Brain has a National Diploma Hotel Management and a Higher National Diploma in Post School Education. He has also obtained the Certificate in Wine and Diploma I and II in Wine from the Cape Wine Academy. He lectures Food and Beverage Studies 1, 2 and 3, Beverage Studies (Including Event Management), as well as Food and Beverage Financial Management 1 and 2, Hospitality Financial Management 1 and 2. He is also a Part-Time Lecturer for the Cape Wine Academy and is also an Examiner for the Cape Sommelier qualification offered by the Cape Wine Academy and moderator for their Cape Wine Advisor course, and also assists with the Annual Soweto Wine Festival. Donald is currently pursuing a master’s degree in Tourism and Hospitality, investigating the influence of wine service training on wine sales in the restaurant environment. The dissertation can be viewed at: https://ujcontent.uj.ac.za/vital/access/manager/Repository/uj:22796. Arthur Donald Brain can be contacted at: dbrain@uj.ac.za
Consumer personality, attitudes and preferences in out-of-home contexts
The case of rosé wine in Italy

Roberta Capitello, Claudia Bazzani and Diego Begalli
Department of Business Administration, University of Verona, Verona, Italy

Abstract

Purpose – This study aims to focus on consumers’ preferences towards rosé wine and explore whether and how the consumption context may influence consumers’ choices.

Design/methodology/approach – Using social networks platform, the authors conducted a choice experiment, to evaluate Italian consumers’ preferences for a glass of rosé in two consumption contexts, restaurant and wine bar. Characteristics of the rosé wine also included price, origin and type of wine. The authors applied a latent class analysis to define rosé wine consumers’ segments and incorporated personality traits in the model.

Findings – The results define three rosé wine drinkers’ profiles: “Wine bar visitors”, “The unenthusiastic” and “Restaurant visitors”. Socio-demographic characteristics and personality traits significantly affect consumers’ membership to the different segments. Who prefers to drink a rosé glass at the wine bar is younger, more opened to new experiences and, therefore, more inclined towards more sophisticated choices. Consumers at the restaurants tend to be more extrovert and sensitive to price.

Practical implications – This study offers insight for practitioners of both wine and hospitality industries in the development of strategies for new products market placement and, at the same time, for academicians who are interested in the understanding of behavioural reasoning of consumers’ wine purchase choices.

Originality/value – This research investigates the effect of consumption context on individuals’ preference formation for a less familiar wine, such as rosé in Italy. To the authors’ knowledge, no previous studies explored how personality traits may affect consumers’ wine consumption context choices.

Keywords Marketing, Italy, Consumer behaviour, Latent class analysis, Alcoholic drinks, Personality, Choice experiment, Out-of-home contexts, Rosé wine

Paper type Research paper

Introduction

In the past decade, rosé wine has attracted growing interest both among wine producers and consumers. Rosé wine production makes up 8-10 per cent of wine production around the world, reaching 22.5 million hectolitres (hL) in 2016 (OIV, 2015; FranceAgriMer, 2017, 2018).

The largest rosé wine-producing countries are France – the leading player with a production of 6.4 million hL in 2016 – Spain, the USA, South Africa and Italy, which between them constitute almost three quarters of production worldwide (FranceAgriMer, 2018). Because of the increasing demand for this product, rosé wine production has generally shown a positive trend since 2002 with a growth rate of 18 per cent worldwide.

The authors would like to thank Dario De Caro for his precious help in the data collection phase. Any remaining errors are the responsibility of the authors.
Italian domestic market is, however, an exception. Rosé has shown a recent decrease in production volume in Italy from 5 million hl in 2010 to 2.3 million hl in 2016 (OIV, 2015; FranceAgriMer, 2018). To overcome price competition from other producing countries such as Spain and South Africa, Italian rosé producers have been focusing on the production of higher-quality products and the improvement of their market position (FranceAgriMer, 2017). Indeed, Italian wine has an important role in the rosé wine market: according to FranceAgriMer (2018), Italy is among the top-three rosé wine-exporting countries in the world. It accounted for 15 per cent of export volume of rosé wine in 2016, after Spain (39 per cent) and France (16 per cent), and for 21 per cent of export value, after the leadership of France with 32 per cent of rosé wine export in value.

Accordingly, some Italian wine-growing areas, such as the Apulia, Veneto, Abruzzo and Lombardy regions, have gained increasing popularity with respect to rosé wine production (Sommacampagna, 2017). Previous research showed that the conjunctive labelling based on place identity and other wine quality attributes (e.g. the grape variety) may increase consumer perception and trust in the quality of the product with a positive effect on brand image and economic benefits for wine producers (Atkin et al., 2017; Bruwer and Johnson, 2010; Johnson and Bruwer, 2007). This might also be the case of the Italian rosé wine. Indeed, in these areas, despite the overall decrease in rosé wine production, a growing number of protected designation of origin (PDO) wine producers have been paying attention to production techniques and the sensory characteristics of rosé wines, showing the ability of some autochthonous grape varieties (such as Negroamaro, Montepulciano, Corvina or Groppello) to produce high-quality rosé wines (Sommacampagna, 2017).

The positive feedback of the market represents for these producers clear evidence that the time is ripe to establish specific PDO schemes for rosé wines (Atzeni, 2017). Indeed, some Italian PDO wines, such as Bardolino, Valténesi, Cerasuolo d’Abruzzo and Salice Salentino, have gained in international popularity thanks to their specialisation in the production of rosé wine. In 2016, 57 per cent of rosé wine produced in Italy was exported. Around 1 million hl were instead domestically consumed and around two-thirds were sold off-premise by large retail chains (Atzeni, 2017). For other wineries, even small-sized ones, the supply of rosé represents a differentiation strategy aimed at enlarging their quality wine product portfolios, especially when rosé is proposed in the sparkling version (Contò et al., 2015).

However, inventories still include a low number of rosé wines, even though rosé can be now considered one of the most suitable products to keep up with new consumption trends in the large retail outlets (OIV, 2015). Conversely, supermarket managers perceive rosé wine as a “static” item on the shelf, unable to attract consumers’ curiosity (Atzeni, 2017). They believe that rosé wine producers should increase their efforts in product packaging, information and promotion to strengthen rosé wine identity and overcome consumers’ preconceptions about this wine as an occasional, seasonal alternative (Sommacampagna, 2017).

In the wake of the success of other rosé-consuming countries’ markets (such as France and the USA), Italian wine magazines and critics have acquired a growing interest in rosé wine (Sommacampagna, 2017). However, despite the growing interest of the market in this product, restaurants and wine shops remain reluctant to introduce new varieties of rosé to their wine lists and inventories (Sommacampagna, 2017). Therefore, Italian consumers generally have a limited range of rosé wines in terms of quality, brand and price, including in hospitality settings.

In this study, we explore consumers’ preferences towards rosé wine products and the factors which may influence these preferences to identify marketing strategies that may encourage the demand for rosé wine in Italy, by identifying potential consumers’ profiles. This
is motivated by the fact that a few studies have yet focused on consumers’ preferences and perceptions about rosé wine (Corsinovi et al., 2013; Fitzmaurice, 2017; Velikova et al., 2015).

In the particular case of the Italian market, recent research has highlighted that consumers began consuming rosé on different occasions, and rosé has become particularly popular among young people, who tend to consume it as an aperitif out of home, for example, at wine bars (Jadeluca, 2017; OIV, 2015). In this new consumption context, one of the main challenges for Italian rosé wine producers is the improvement of rosé wine quality and the design of new sensory profiles more in line with the expectations of the contemporary consumer (e.g. seeking of new wine styles, uncommon foods, more informal and deconstructed consumption occasions). Therefore, the “renaissance” of rosé wine in Italy should begin with the analysis of consumer behaviour in the hospitality context (Jadeluca, 2017).

Accordingly, in this study, we specifically focus on the effect of out-of-home contexts on consumer preferences for rosé wine. The effect of consumption situation on consumer preference formation is an often-discussed topic in the wine marketing literature (Agnoli et al., 2011; Hall et al., 2001; Hirche and Bruwer, 2014; Platania et al., 2016; Roe and Bruwer, 2017).

Studies have shown that context – for example, restaurant, wine bar or pub – has a significant effect on consumers’ choices regarding alcoholic beverages including wine (Agnoli et al., 2011; Jaeger et al., 2017; Quester and Smart, 1998; Rahman and Reynolds, 2015; Silva et al., 2017). These studies have mainly explored consumers’ perceptions about traditional or largely popular wine products. However, the hospitality literature shows that the out-of-home consumption context has a relevant role to play in consumer attitudes towards and acceptance of foods and beverages, especially in the case of novel and unfamiliar products (Bonn et al., 2018; Kim and Moon, 2009; Mak et al., 2012; Stroebele and De Castro, 2004). Hence, in this study, we aim to investigate for the first time whether and how the consumption context may influence consumers’ preferences for a less familiar and less traditional wine product, such as rosé wine in Italy.

The literature highlights that factors such as socio-demographic and attitudinal information may significantly affect consumers’ wine preferences (Brunner and Siegrist, 2011; Bruwer and McCutcheon, 2017; Oh and Hwang, 2018; Vigar-Ellis et al., 2015). Recently, an increasing number of studies have focused on investigating how psychological factors may influence consumers’ wine preferences (Cox, 2009; Danner et al., 2016; Parr, 2018; Spielmann et al., 2016; Roe and Bruwer, 2017; Olsen et al., 2015). Individual personalities have been increasingly exploited to better understand consumers’ behaviour, as personality traits are stable features that capture how individuals think, feel and behave, regardless the situation under consideration (APA, 2014). The importance of understanding individual personalities is shown by the fact that consumers make consumption choices congruent with their self-concept; thus, their choices should reveal who they are (Malhotra, 1988). As such, the identification of consumers’ self-concept and of product characteristics that mirror their self-concept would significantly facilitate the adoption of successful marketing strategies. For this reason, in this work, we aim at capturing the effect of personality traits on rosé wine choices.

Indeed, the effect of personality on consumers’ food, beverage and service choices has been widely explored (Bazzani et al., 2017; Morey and Thiene, 2017; Spielmann et al., 2016). In regard to wine marketing, a study by Danner et al. (2016) investigated how context influences consumers’ emotions and expectations about wine quality features; however, to our knowledge, no studies have explored how personality traits may affect consumers’ wine
consumption context choices. For example, would an open-minded person be more willing to consume a glass of wine in a traditional restaurant or an informal, deconstructed situation such as when enjoying an aperitif in a wine bar? Conversely, where would a person that tends to be anxious prefer to consume wine?

To fill this knowledge gap, we conducted a choice experiment (CE) on social networks to evaluate consumers’ preferences for a glass of rosé wine in different consumption contexts[1], that is, restaurant versus wine bar while accounting for the effect of personality traits (the “Five Factor Model”, FFM) on their decision-making (Bouchard and Loehlin, 2001; Perugini and Gallucci, 1997).

To summarise, the objectives of this study are multiple, and we specifically aim at advancing the literature in three ways:

(1) we explore consumers’ preferences for rosé wine products in an emerging rosé wine-consuming country, that is, Italy;
(2) we investigate the effect of consumption context on individuals’ preference formation for an uncommon wine product in the area of interest, examining the opportunities presented by different hospitality settings in orienting the development strategy of a new wine product; and
(3) we investigate the effect of personality traits on consumers’ wine consumption context preferences.

Results from this study may provide insight for practitioners in both the wine and restaurant industries with regard to the development of strategies for new product market placement, as well as for academics who are interested in understanding behavioural reasoning in consumers’ wine purchase choices.

Literature review

Consumers’ preferences and perceptions about rosé wine
As previously mentioned, a limited number of studies have investigated consumers’ preferences and perceptions about rosé wine. To our knowledge, the first attempt to identify a rosé consumer profile was the study of Johnson and Bastian (2007). The authors analysed how Australian consumers’ wine knowledge and expertise affected their behaviour in purchasing different kinds of wine. They observed that females with a lower degree of knowledge tended to have more positive attitudes about rosé wines. The study of Corsinovi et al. (2013) considered rosé wine as the product in question and used a Best–Worst Scaling approach to investigate the main motivations for Italian market consumers to purchase rosé wines. The results showed that the adequate match of the wine with food, the tasting experience and the willingness to try something new were the most important factors in determining rosé wine choice at restaurants. However, the origin of the product was indicated as the main aspect in the rosé wine purchasing process at retail stores. Velikova et al. (2015) advanced the literature by conducting a multi-country analysis (in the USA, New Zealand, France and the UK) exploring consumers’ preferences and perceptions about rosé wine. They observed that differences in cultural factors and brand image management were the main sources of heterogeneity in consumers’ rosé wine preferences across the populations. Finally, Fitzmaurice (2017) investigated the rosé wine market from a sociological perspective, highlighting how the perception and classification of a product by elite wine critics have recently changed in the USA, where critics now use a new, high-status, category identity for rosé.
Hospitality context and consumers’ wine choices

The important role of consumption situation on consumer choice behaviour has been highlighted in the marketing literature (Hornik, 1982; Russell, 1974; Stayman and Deshpande, 1989). As Bonn et al. (2018) point out, understanding the effect on consumer wine choice behaviour of the interaction between wine product quality and hospitality service quality – such as consumption context – is attracting significant attention from both wine and hospitality practitioners in regard to new market segmentation strategy development.

Indeed, the seminal study of Quester and Smart (1998) showed that consumers’ perceptions of wine attributes – especially price and origin – varied depending on the situation of consumption. The effect of context on consumer perceptions of wine quality attributes has been more recently confirmed in the studies of Roe and Bruwer (2017) and Ruiz-Molina et al. (2010). Olsen et al. (2015) observed that context also affected consumers wine variety choices. The studies of Fountain and Lamb (2011) and Agnoli et al. (2011) examined the effect of context on wine consumption patterns across different generations in New Zealand and Italy, respectively. Specifically, Fountain and Lamb (2011) found that Generation Y tends to consume wine on more differentiated occasions than does Generation X, whereas Agnoli et al. (2011) observed that Generation Y consumers tend to vary their preferences for different kinds of alcoholic drinks (i.e. wine, beer and spirits) according to consumption contexts, such as restaurants, bars and discos. Silva et al. (2017) also investigated the effect of context on individuals’ choices for different types of drinks (i.e. wine, beer and non-alcoholic drinks) in Portugal and The Netherlands. In both countries, consumer choice was observed to vary according to the occasion: wine was preferred on formal occasions, beer on informal occasions and non-alcoholic drinks on occasions when the consumption of alcohol was not convenient. Similarly, Cohen and d’Hauteville (2009) analysed consumers’ preferences for different wine quality characteristics in the UK, France and Australia and observed that context – that is, different types of restaurants – played a significant role in consumers’ wine choices across these countries. Finally, Danner et al. (2016) investigated how Australian consumers’ evaluations of different characteristics of Shiraz wine varied according to the context in which the experiment was conducted: in the lab, at home and at a restaurant. They observed a context effect on participants’ emotions in response to the product in question. Specifically, they found that restaurant context evoked more intense positive emotions than did the home and laboratory contexts.

Wine drinkers’ personalities and wine choices

With regard to psychological factors and their effect on consumers’ wine choices, studies have mainly focused on the investigation of aspects such as self-image, social identity, risk aversion, emotions and involvement (Barber et al., 2006; Cox, 2009; Danner et al., 2016; Lockshin et al., 2006). Recent research by Spielmann et al. (2016) has focused attention on the role of personality traits in the understanding of consumers’ wine choices. The authors developed a personality-based measure to estimate wine-consuming personalities of Millennials wine: personality traits were revealed as significant factors in the explanation of young consumers’ attitudes towards wine products. Specifically, the authors claim that the developed scale is a potential tool for wine industry practitioners to better identify their brand identity perception and therefore to differentiate their product lines, brands and origins from others in the market.
Methods

Data
Data for this study were collected through an online survey of 287 wine consumers in Italy between July and September 2017. The survey was distributed via various Italian Facebook groups covering discussions related to wine consumption, such as wine-tasting experiences and participation in related events.

Only consumers who stated they consumed rosé wine were eligible to take part in the full survey, including the CE, and our final sample consisted of 179 respondents. The main characteristics of our sample of rosé wine consumers are outlined in Table I.

The respondents were mainly women (65.4 per cent) and mostly young (64.8 per cent less than or equal to 40 years of age) with a high level of education and medium to low individual income. The majority of respondents stated that they consumed rosé wine regularly (once a week for 69.9 per cent of the sample). Only 15.6 and 19.0 per cent of respondents were frequent wine bar and restaurant visitors, respectively, whereas the remaining respondents usually went once a week or less. Not surprisingly for consumers of a traditional wine-consuming country such as Italy, respondents consider wine as an important product for their life and they like it; they are instead less involved with respect to wine-related experiences (as such read wine books or attend wine festivals).

Choice experiment
In this study we used a CE approach to identify consumers’ preferences for different kinds of rosé wine. CEs are one of the most popular methods in marketing and applied economics for the investigation of individuals’ evaluations of products’ attributes. This is because CEs have the advantage of eliciting simultaneously respondents’ preferences for different attributes and attribute levels (Caputo et al., 2017; Scarpa et al., 2008; Train, 2003). Thus, CEs have been widely implemented to assess consumers’ preferences for different characteristics of wine products (Escobar et al., 2018; Lockshin et al., 2006, 2017; Loose and Lockshin, 2013; Mueller Loose et al., 2013; Mueller Loose et al., 2010a, 2010b). In addition, CEs are increasingly used in hospitality studies to analyse customers’ choices regarding qualities of services (Crouch and Louviere, 2004; Matthews et al., 2018; Victorino et al., 2005).

When designing a CE, the first step is the determination of the product under consideration, which in our case is a serving (100-mL glass) of rosé wine. The second step is the selection of the attributes describing the product. In this study, we selected four types of attributes, each described by different levels (Table II).

Given our interest in exploring the consumption context effect on consumers’ wine choices, we chose the “out-of-home context” as one of the attributes. We specifically selected the wine bar and the restaurant settings because these reflect the contexts where the wine is mostly consumed out of the home in Italy (Agnoli et al., 2011; Casini et al., 2009). Moreover, the type of wine, that is, still or sparkling, is considered an important aspect of wine preference, especially in relation to the consumption context (Danner et al., 2016). Hence, we included “type of wine” as an attribute, defining the levels as sparkling and still. In addition, previous studies have shown that origin strongly affects Italian consumers’ preferences for wine products (Casini et al., 2009; Scarpa et al., 2007). Thus, “origin” was used as one of the product attributes. Specifically, we implemented four origin levels: from the region of the respondent’s residence in Italy, from Italy but outside the region of the respondent’s residence, from France, as it is the leading rosé wine-producing country; and from the USA, which is an emerging rosé wine-producing and exporting country in the so-called new world of wine (Velikova et al., 2015). Finally, four price levels were selected, aiming to reflect the
<table>
<thead>
<tr>
<th>Characteristic</th>
<th>( n )</th>
<th>(%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Gender</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Male</td>
<td>62</td>
<td>34.6</td>
</tr>
<tr>
<td>Female</td>
<td>117</td>
<td>65.4</td>
</tr>
<tr>
<td>Age (years)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>18-25</td>
<td>44</td>
<td>24.6</td>
</tr>
<tr>
<td>26-32</td>
<td>31</td>
<td>17.3</td>
</tr>
<tr>
<td>33-40</td>
<td>41</td>
<td>22.9</td>
</tr>
<tr>
<td>41-49</td>
<td>33</td>
<td>18.4</td>
</tr>
<tr>
<td>50+</td>
<td>30</td>
<td>16.8</td>
</tr>
<tr>
<td>Education</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Compulsory school</td>
<td>5</td>
<td>2.8</td>
</tr>
<tr>
<td>High school</td>
<td>53</td>
<td>29.6</td>
</tr>
<tr>
<td>Bachelor degree</td>
<td>47</td>
<td>26.3</td>
</tr>
<tr>
<td>Master degree</td>
<td>74</td>
<td>41.3</td>
</tr>
<tr>
<td>Income (€/person/year)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>&lt;15,000</td>
<td>60</td>
<td>33.5</td>
</tr>
<tr>
<td>15,001-28,000</td>
<td>65</td>
<td>36.3</td>
</tr>
<tr>
<td>28,001-55,000</td>
<td>40</td>
<td>22.3</td>
</tr>
<tr>
<td>55,001-75,000</td>
<td>8</td>
<td>4.5</td>
</tr>
<tr>
<td>&gt;75,000</td>
<td>6</td>
<td>3.4</td>
</tr>
<tr>
<td>Frequency of rosé consumption</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Daily</td>
<td>37</td>
<td>20.7</td>
</tr>
<tr>
<td>More than once a week</td>
<td>88</td>
<td>49.2</td>
</tr>
<tr>
<td>Once a week</td>
<td>29</td>
<td>16.2</td>
</tr>
<tr>
<td>Two or three times a month</td>
<td>17</td>
<td>9.5</td>
</tr>
<tr>
<td>Once a month</td>
<td>3</td>
<td>1.7</td>
</tr>
<tr>
<td>Sometimes in a year</td>
<td>5</td>
<td>2.7</td>
</tr>
<tr>
<td>Frequency of restaurant attendance</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Daily</td>
<td>4</td>
<td>2.2</td>
</tr>
<tr>
<td>More than once a week</td>
<td>24</td>
<td>13.4</td>
</tr>
<tr>
<td>Once a week</td>
<td>41</td>
<td>23.0</td>
</tr>
<tr>
<td>Two or three times a month</td>
<td>48</td>
<td>26.8</td>
</tr>
<tr>
<td>Once a month</td>
<td>34</td>
<td>19.0</td>
</tr>
<tr>
<td>Sometimes in a year</td>
<td>28</td>
<td>15.6</td>
</tr>
<tr>
<td>Never</td>
<td>0</td>
<td>0.0</td>
</tr>
<tr>
<td>Frequency of wine bar attendance</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Daily</td>
<td>3</td>
<td>1.7</td>
</tr>
<tr>
<td>More than once a week</td>
<td>31</td>
<td>17.3</td>
</tr>
<tr>
<td>Once a week</td>
<td>29</td>
<td>16.2</td>
</tr>
<tr>
<td>Two or three times a month</td>
<td>37</td>
<td>20.7</td>
</tr>
<tr>
<td>Once a month</td>
<td>14</td>
<td>7.8</td>
</tr>
<tr>
<td>Sometimes in a year</td>
<td>42</td>
<td>23.5</td>
</tr>
<tr>
<td>Never</td>
<td>23</td>
<td>12.8</td>
</tr>
</tbody>
</table>

Involvement with wine*                    | 5.97    |
| “Wine is an important product for me”    | 6.42    |
| “I like wine”                            | 3.99    |
| “I read wine books and magazines”        | 4.79    |

Table I. Characteristics of surveyed rosé wine consumers (\( n = 179 \))

Notes: *Wine involvement was measured using a Likert scale. Respondents were asked how much each item described their attitudes, from 1 (not at all) to 7 (fully). The reported values are means of the Likert scale for each item.
prices (in euro) of a 100-mL glass of rosé wine at wine bars and restaurants in Italy: €3.5, €5.0, €6.5 and €8.0.

Once the attributes and levels had been determined, the experimental design was generated. A fractional factorial orthogonal design was implemented to allocate the attribute information across a set of 12 choice tasks focused on two product alternatives (Louviere et al., 2000). For each choice task, a “neither of these” alternative was added to let respondents opt out in case they did not prefer either alternative. In addition, pictures representing the different types of rosé in the two contexts were provided in an attempt to visually facilitate respondents in the recognition of the consumption situation (Figure 1).

For each of the 12 choice tasks, respondents were asked to indicate the context they preferred or to opt out.

<table>
<thead>
<tr>
<th>Attribute</th>
<th>Attribute level</th>
</tr>
</thead>
<tbody>
<tr>
<td>Out-of-home context</td>
<td>Wine bar</td>
</tr>
<tr>
<td></td>
<td>Restaurant</td>
</tr>
<tr>
<td>Type of wine</td>
<td>Still</td>
</tr>
<tr>
<td></td>
<td>Sparkling</td>
</tr>
<tr>
<td>Origin</td>
<td>Italy, region of residence of the respondent</td>
</tr>
<tr>
<td></td>
<td>Italy, but outside the region of residence of the respondent</td>
</tr>
<tr>
<td></td>
<td>France</td>
</tr>
<tr>
<td></td>
<td>The USA</td>
</tr>
<tr>
<td>Price (EUR) for 100-mL glass</td>
<td>3.5</td>
</tr>
<tr>
<td></td>
<td>5</td>
</tr>
<tr>
<td></td>
<td>6.5</td>
</tr>
<tr>
<td></td>
<td>8</td>
</tr>
</tbody>
</table>

Table II. Attributes and attribute levels

Figure 1. Example of a choice task
**Personality trait measurement**

The FFM is one of the most popular models used in psychology to measure personality traits (Bouchard and Loehlin, 2001; Perugini and Gallucci, 1997). The FFM accounts for the presence of five main personality dimensions that are in turn composed of narrower traits. Specifically, the five main dimensions are Openness to experiences (O), Conscientiousness (C), Extraversion (E), Agreeableness (A) and Neuroticism (N). Each of these five “OCEAN” dimensions is described by more specific personality traits. “Openness to experiences” describes traits related to intellectual activity, openness or scepticism regarding novelty, inclination to be practical or imaginative and flexibility in emotions and ideas. “Conscientiousness” refers to traits such as the tendency to be organised, active and hardworking. “Extraversion” describes the inclination to be sociable, lively and extraverted. “Agreeableness” is the sum of those traits that define an individual as cooperative, helpful, sympathetic, caring and trustworthy. “Neuroticism” refers to all traits related to emotional instability such as anxiety, inability to react to stressful situations and self-consciousness (Bouchard and Loehlin, 2001; Perugini and Gallucci, 1997).

In this study, we implemented the Ten-Item Personality Inventory (TIPI) scale (Gosling et al., 2003), which consists of ten items capturing the five OCEAN dimensions. The scale has been developed over two studies conducted in the USA on more than 2,000 university students, and its efficacy has been validated on the basis of existing personality measures with a larger number of items. The TIPI scale is one of the most commonly implemented personality measures in the social sciences, such as psychology, economics and marketing. The main advantage of the TIPI scale is its conciseness. Each dimension is described by two narrower traits as reported in Table III for this study’s respondents.

This study used a validated Italian translation of the TIPI scale (Chiorri et al., 2015). Respondents were asked to rate on a scale from 1 (strongly disagree) to 7 (strongly agree) the extent to which a pair of adjectives applied to them. Table III shows that conscientiousness was the personality dimension with which respondents mostly identified (mean = 5.66), followed by being sympathetic and being emotionally stable (means equal to 5.31 and 5.14, respectively). Extraversion, on the other hand, was the personality trait with the lowest score (4.31), indicating that in general respondents were not strongly extraverted.

<table>
<thead>
<tr>
<th>Dimensions</th>
<th>Mean</th>
<th>Trait</th>
<th>Mean</th>
</tr>
</thead>
<tbody>
<tr>
<td>Openness to experience</td>
<td>4.941</td>
<td>Open to new experiences, complex</td>
<td>5.977</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Conventional, uncreative*</td>
<td>3.905</td>
</tr>
<tr>
<td>Conscientiousness</td>
<td>5.662</td>
<td>Dependable, self-disciplined</td>
<td>5.877</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Disorganised, careless*</td>
<td>5.446</td>
</tr>
<tr>
<td>Extraversion</td>
<td>4.318</td>
<td>Extraverted, enthusiastic</td>
<td>4.631</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Reserved, quiet*</td>
<td>4.005</td>
</tr>
<tr>
<td>Agreeableness</td>
<td>5.310</td>
<td>Critical, quarrelsome*</td>
<td>5.117</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Sympathetic, warm</td>
<td>5.502</td>
</tr>
<tr>
<td>Neuroticism</td>
<td>5.142</td>
<td>Anxious, easily upset*</td>
<td>4.944</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Calm, emotionally stable</td>
<td>5.340</td>
</tr>
</tbody>
</table>

**Table III.**

Personality trait dimensions of the sample \((n = 179)\)

**Note:** *Item is reverse coded*
**Empirical model**

Respondents’ choices were analysed using discrete choice models (DCMs). DCMs are consistent with random utility theory (McFadden, 1974), which assumes that the utility for individual $n$ of choosing alternative $j$ in the $t$th choice situation can be specified as:

$$U_{njt} = \beta'_{nj}x_{njt} + \epsilon_{njt}$$  \hspace{1cm} (1)

where $x_{njt}$ is a vector of the observed variables relating to alternative $j$, and individual $n$, $\beta'_{nj}$ is a vector of structural taste parameters that characterise choices and $\epsilon_{njt}$ is the unobserved error term, assumed to be independent of $\beta$ and $x$.

Evidence from the food and beverage literature shows that consumers’ preferences are generally heterogeneous (Caputo et al., 2013; Casini et al., 2009; Gracia, 2013; Mueller Loose et al., 2010a, 2010b). In DCMs, two main approaches can be used to account for heterogeneity. Heterogeneity can be assumed to occur with a continuous distribution, meaning that each individual is assumed to have their own preferences. This is the case with the random parameters logit model (Train, 2003). Alternatively, heterogeneity can be taken into account in a discrete way: because part-worth utility varies across consumer groups or classes, the sample can be split into a discrete number of market segments (Boxall and Adamowicz, 2002; Scarpa et al., 2003; Thiene et al., 2015). The latent class model (LCM) takes into account that, within each segment, consumer preferences are homogeneous, but that preferences vary between segments. The LCM has been widely implemented in marketing and service quality evaluation for the identification of potential consumers’ profiles (Morey and Thiene, 2017; Peschel et al., 2016; Scarpa et al., 2009). Accordingly, in this study, we opted to implement a latent class analysis for its suitability in the definition of potential rosé wine consumer segments.

In LCMs, the utility that individual $n$ derives from a certain alternative is not individual specific but depends on their belongingness to one of the $q = 1, 2, \ldots, Q$ latent classes. As such, the probability that individual $n$ chooses alternative $j$ in choice task $t$ is:

$$\text{Prob}_{njt|q} = \frac{\exp(x'_{njt}\beta_q)}{\sum_j \exp(x'_{njt}\beta_q)}$$  \hspace{1cm} (2)

According to the Lancaster theory (Lancaster, 1966), the utility given by the choice of a product can be segregated in the partial utilities that the individual derives from the attributes of the product. As such, in our study, the utility of consumer $n$, belonging to class $q$, in choosing a glass of rosé wine can be explained as follows:

$$U_{njt|q} = \text{NOBUY} + \beta_{1|q}\text{PRICE}_{njt} + \beta_{2|q}\text{WINEBAR}_{njt} + \beta_{3|q}\text{SPARKLING}_{njt} + \beta_{4|q}\text{USA}_{njt} + \beta_{5|q}\text{FRANCE}_{njt} + \beta_{6|q}\text{ITALY}_{njt}$$  \hspace{1cm} (3)

where NOBUY is the alternative constant relative to the no-purchase option, PRICE is a continuous variable representing the four experimentally designed levels, WINEBAR is a dummy variable that takes a value of 1 when the context in consideration is a wine bar and 0 if it is a restaurant, SPARKLING is a dummy variable that takes a value of 1 when the type of wine is sparkling and 0 if still and the USA, FRANCE and ITALY are dummy variables.
describing, respectively, the countries under consideration (regional origin was treated as a reference level).

Finally, to describe latent classes with the consumer characteristics of interest, we followed the approach described by Boxall and Adamowicz (2002) by incorporating personality traits, attitudinal and socio-demographic characteristics to explain segment membership.

Results
In our LCM estimation, we selected the optimal number of classes in accordance with the log likelihood function and Akaike information criteria statistics – the overall aim being segment parsimony. Based on these criteria, the results from the LCM suggest three classes (Table IV). Following Bazzani et al. (2017) and Grebitus et al. (2013), we incorporated the personality dimensions as mean-centred values by subtracting the overall mean from the personality scores of each individual so that the average personalities had a mean of zero. Conversely, in regard to attitudinal and socio-demographic information, we created dummy variables on the basis of the median value of the population (0 for the lower level and 1 for the higher level), except for the age variable, which was counted as a continuous variable. In terms of attitudinal variables, we included the frequency of visiting a wine bar or restaurant

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Class 1 (Wine bar visitors)</th>
<th>Class 2 (The unenthusiastic)</th>
<th>Class 3 (Restaurant visitors)</th>
</tr>
</thead>
<tbody>
<tr>
<td>NOBUY</td>
<td>-2.553*** (9.17)</td>
<td>-1.492 (1.28)</td>
<td>-1.150*** (3.38)</td>
</tr>
<tr>
<td>Price</td>
<td>-0.011 (0.48)</td>
<td>0.058 (0.47)</td>
<td>-0.192*** (4.19)</td>
</tr>
<tr>
<td>Wine bar</td>
<td>0.242* (1.75)</td>
<td>0.342 (0.66)</td>
<td>-0.544*** (3.19)</td>
</tr>
<tr>
<td>Sparkling</td>
<td>0.336*** (3.01)</td>
<td>-3.205*** (7.16)</td>
<td>0.459** (2.16)</td>
</tr>
<tr>
<td>The USA</td>
<td>-1.725*** (10.39)</td>
<td>-2.359*** (2.93)</td>
<td>-2.972*** (7.96)</td>
</tr>
<tr>
<td>France</td>
<td>-0.115 (0.55)</td>
<td>-1.633*** (2.79)</td>
<td>-1.271*** (5.73)</td>
</tr>
<tr>
<td>Italy</td>
<td>0.095 (0.58)</td>
<td>-0.501 (0.72)</td>
<td>0.242 (1.13)</td>
</tr>
<tr>
<td><strong>Respondent characteristic</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Openness</td>
<td>0.654*** (2.74)</td>
<td>0.069 (0.18)</td>
<td></td>
</tr>
<tr>
<td>Conscientiousness</td>
<td>0.137 (0.60)</td>
<td>0.088 (0.22)</td>
<td></td>
</tr>
<tr>
<td>Extraversion</td>
<td>-0.340* (1.82)</td>
<td>0.051 (0.16)</td>
<td></td>
</tr>
<tr>
<td>Agreeableness</td>
<td>0.142 (0.69)</td>
<td>0.452 (1.01)</td>
<td></td>
</tr>
<tr>
<td>Neuroticism</td>
<td>-0.259 (1.18)</td>
<td>-0.203 (0.59)</td>
<td></td>
</tr>
<tr>
<td>Frequency wine bar</td>
<td>1.519*** (3.12)</td>
<td>1.676* (1.65)</td>
<td></td>
</tr>
<tr>
<td>Frequency restaurant</td>
<td>-0.436 (0.88)</td>
<td>-1.208 (1.41)</td>
<td></td>
</tr>
<tr>
<td>Income</td>
<td>1.025 (1.54)</td>
<td>2.221* (1.70)</td>
<td></td>
</tr>
<tr>
<td>Education</td>
<td>-0.393 (0.70)</td>
<td>0.479 (0.53)</td>
<td></td>
</tr>
<tr>
<td>Gender</td>
<td>0.042 (0.07)</td>
<td>0.740 (0.69)</td>
<td></td>
</tr>
<tr>
<td>Age</td>
<td>-0.047* (1.82)</td>
<td>-0.043 (0.92)</td>
<td></td>
</tr>
<tr>
<td>Intercept</td>
<td>1.614* (1.71)</td>
<td>-1.266 (0.55)</td>
<td></td>
</tr>
<tr>
<td>Estimated latent class probabilities</td>
<td>0.578***</td>
<td>0.117***</td>
<td>0.304***</td>
</tr>
</tbody>
</table>

**Model fit statistics**
- Log likelihood: -1,725.6
- Akaike information criteria: 3,541.7
- Number of observations: 2,148

Table IV. LCM estimation

Notes: ***, ** and * indicate significance at the 1, 5 and 10 per cent level, respectively. Numbers in parenthesis are |t-values|
as a manipulation check for the latent preferences estimated in the model[2]. As Table IV shows, Class 3 was considered the reference class for the determination of the effect of individuals’ characteristics.

On the basis of the model estimation, we defined three rosé wine drinkers’ profiles according to preference for the contexts under consideration.

**Wine bar visitors**
The positive and significant parameter describing the context indicates that this segment of consumers (58 per cent of probability) prefers consuming rosé at a wine bar rather than at a restaurant. They have a significant preference for sparkling over still rosé wine. With regard to origin, the highly significant and negative coefficient of the USA variable suggests that wine bar visitors have a strong disutility in choosing wine from the USA, whereas the insignificant coefficients of Italy and France parameters indicate that they are indifferent about whether it comes from their region of residence, Italy or France. The high negative sign for the no-purchase option indicates that this group of consumers has a strong preference for consuming rosé rather than not consuming it. This is also confirmed by the fact that an increase in the price of the product does not have a significant effect on their choice. Interestingly, the personality trait related to openness to experience has a positive significant sign, meaning that more opened-minded people tend to belong to the class of the wine bar visitors, whereas being more extravert significantly decreases their probability of belonging to this class of rosé wine drinkers. In accordance with the literature (Silva *et al.*, 2017), an increase in respondent age significantly decreases the probability of belonging to this class. Finally, the frequency of visiting wine bars has a significant effect on membership of this class, confirming that people who stated that they visit wine bars more frequently tend to belong to this class with higher probability than the other classes.

**The unenthusiastic**
This type of consumer represents the lowest percentage of the sample (12 per cent of probability). The NOBUY constant is not significant, indicating that this segment of consumers may not have an interest in consuming rosé in general. We named this the “unenthusiastic” group because estimates did not show any significant preference for the context variable. The negative significant sign of the SPARKLING parameter indicates that this group prefers still rosé to sparkling and prefers products from their region of residence and from the rest of Italy, rather than from the USA or France. Personality traits do not significantly affect respondents’ membership to this class over that of Class 3, whereas a higher-income level and a higher frequency of visiting wine bars significantly increase the probability of belonging to this group.

**Restaurant visitors**
Contrary to the wine bar visitors, the coefficient of the WINEBAR variable is significantly negative, indicating that this group of respondents (30 per cent of probability) tends to prefer the restaurant context rather than the wine bar context. The negative sign of the NOBUY parameter suggests that they tend to prefer purchasing rosé rather than not purchasing it, but the probability of choosing the product decreases if the price increases. They have a significant preference for sparkling wine over still and for Italian origins over France and the USA.
Discussion and conclusions

Results from our study confirm our hypothesis that context plays a relevant role in consumers’ rosé wine choices. Indeed, the context variable was revealed as the one characterising the three groups of rosé wine consumers. Moreover, our results provide evidence that personality traits significantly affect consumers’ membership of the different segments. Those who prefer to drink a glass of rosé at a wine bar are younger, more open to new experiences and, therefore, more inclined towards more sophisticated choices. In contrast, consumers at restaurants tend to be more extravert and may be more willing to share the experience of drinking rosé with dining companions.

Our results also show that the “wine bar visitor” segment is keen towards local wines, from other Italian regions and from France – the latter being interpreted as more traditional and classy. Indeed, the Provence region can be considered a point of reference for rosé wine production. This finding confirms the positive effect that place-based branding has on consumer awareness and preferences, explaining the benefits that French rosé wine producers have derived from a collaborative regional marketing strategy (Atkin et al., 2017). The positive attitude of wine bar visitors towards a new product and variety seeking, irrespective of price, may be explained as an attempt to socialise and concern for social image, which usually characterises younger consumers (Agnoli et al., 2011; Agnoli et al., 2018; Olsen et al., 2015).

In contrast, restaurant visitors do care about price, which is actually not surprising. Indeed, price is a factor about which consumers are very sensitive in the restaurant sector, because price policies adopted by restaurant owners cannot be directly controlled by wine producers, who, when aware, are often concerned about the high level of applied markup (Bonn et al., 2018).

Age is the socio-demographic variable most strongly determining respondents’ membership to the wine bar and restaurant visitor classes. Specifically, older consumers tend to prefer restaurants over wine bars. This is consistent with previous studies that showed that Generation X and Baby Boomers, in contrast to Generation Y, tend to prefer the consumption of wine along with the consumption of a meal rather than at aperitif time or pre-dinner (Agnoli et al., 2011; Fountain and Lamb, 2011).

Income is the characteristic of respondents that determines membership of the “unenthusiastic” segment. This might be explained by the fact that higher-income consumers are more inclined to buy expensive wines and therefore are less interested in rosé wine, which is generally marketed as a lower-price wine (Velikova et al., 2015). The disinterest of the “unenthusiastic” segment in the out-of-home consumption context in addition may suggest that this profile of rosé wine consumers is less inclined to consume rosé wine during on-premise occasions.

Our results are partially consistent with the study of Velikova et al. (2015) who observed that, while rosé wine had a strong feminine association in the case of the US markets, gender did not have a significant effect on consumers’ perception towards rosé wine in the case of the French sample. This might suggest that rosé wine may have lost the feminine appeal that led the shops to address their marketing strategies towards packaging and communication for women consumers (Corsinovi et al., 2013).

Also, our results show that the degree of education is not able to influence consumer preferences and discriminate segment membership.

Overall, product strategies for rosé wine are definitively the sparkling and Italian origin attributes, as these were the variables mostly appreciated by the different segments. Hence, rosé wine producers should adopt strategies focused on the use of specific production techniques, such as spumanti vinification. Indeed, this type of vinification has allowed
Italian producers to design a product that stands out, in terms of quality and sensory profile, from the still rosé. Hence, the spumante vinification may also have advantages from the marketing point of view to establish a positive evaluation by the consumers, especially when it is combined with reputed corporate brands. The use of local varieties is a further key point to propose new styles and revitalise the product portfolio to achieve marketing benefits related to the development of a product identity, brand image and market penetration (Fitzmaurice, 2017).

Practical implications and future research recommendations
This study shows that the two focal hospitality settings may be key aspects of the rosé wine product differentiation process, suggesting that strategies may benefit from cooperation between producers and restaurateurs/wine bar manager. In addition, findings indicate that personality traits do influence consumers’ choices in the out-of-home consumption context: more open-minded consumers tend to consume rosé wine at wine bars and more extravert consumers, at restaurants.

This might suggest that, in the case of wine bar visitors, a successful marketing strategy would be to focus on the novelty aspect of the product and their ability, for the wine bar managers, to enlarge their supply and keep pace with the market. To illustrate, wine bar managers could add rosé wines to their wine list to offer a wider choice of products in addition to the more common red and white wines. Our results further suggest that, in particular for wine bars, specifying a rosé wine’s origin might further motivate consumers’ (mostly young people) curiosity and interest in rosé wine. Therefore, we posit that wineries should emphasise rosé wines belonging to PDO areas and/or autochthonous varieties “re-interpreted” for rosé wine production. A good brand image based on origin information is of paramount importance to vouch for the quality of the product and encourage consumers to call back at the same wine bar and ask for the same rosé wine brand. Consumer loyalty is, in fact, a key element in increasing demand and successful development of new products. Therefore, future studies should explore potential branding strategies of rosé wine products and factors, with a particular focus on PDO specification, that may significantly affect consumers’ wine post-purchase behaviours in the hospitality context. Another factor to be considered is the loyalty of wine bar managers towards a specific wine or producer. Wine bars are generally settings with a potential high turnover of products and suppliers in the wine lists. The search for the originality of the product, driven by the consumer’s curiosity and preference, could determine high rates of substitution in terms of types of wine and producers. Product differentiation combined with collective and corporate reputation may then help a rosé wine producer to reduce the risk of product/brand substitution.

With respect to restaurant visitors, their attitude and social, extraverted personality might suggest that the combination of wine with food and, therefore, sharing of the meal experience is an important factor in determining their wine choices. As such, to encourage consumers’ interest in rosé wine, given that the differentiation in terms of origin is less important than in wine bars, wineries and restaurateurs should adopt strategies to increase consumers’ knowledge of the product quality, and its value for money, the specific sensory characteristics (colour and aromas) and the best compatibility with food. In the latter respect, cooperation between wine producers and restaurant owners would be very important in favouring an exchange of information to improve the mutual knowledge of wine production techniques and wine–food combinations. Therefore, future research on consumers’ choice behaviour should focus on investigating the influence of foods combined
with rosé wine, aimed at guiding producers and restaurateurs in the supply of different types of rosé wines and in the development of marketing strategies that could increase consumer loyalty towards these products.

In conclusion, rosé wine consumer profiles in the two hospitality settings confirm that the cooperation between wine producers and restaurant/wine bar managers remains a pivotal aspect for a product, such as rosé wine, still characterised by a large information asymmetry in the market. The asymmetry involves not only the relationship between end consumers and the producer but also the vendors participating at different stages of the supply chain. Therefore, future research could study the criteria that restaurant and wine bar managers use during the selection and the turnover of suppliers. Research should also investigate how rose wines compete with red and white wines in the formation of wine lists.

Finally, future research could also explore the effect of the different sources of information, such as wine critics, social media communication, dedicated festivals and theme events, on Italian rosé consumer choice.

Notes

1. The primary goal of the present study was to reach rosé drinkers among wine consumers. Therefore, the administration of the questionnaire through social media networks, rather than through face-to-face or telephone interviews, was preferred because of constraints in terms of time and budget and because of the low penetration of rosé wine consumption. Indeed, only 5 times out of 100 will an Italian wine consumer choose a rosé wine rather than a white or red wine (Jadeluca, 2017).

2. Attitudinal variables, such as wine involvement and the frequency of consuming rosé wine, were originally also included in the LCM analysis, but we did not observe any significant effect on the segment membership. For this reason, we opted for not including this information in the final model.

References


The case of rosé wine in Italy


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Hospitality situations, consumer expertise, and perceptions of wine attributes: three empirical studies

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Abstract

Purpose – Wine choices are not always fully understood by academic researchers or the industry. This paper aims to outline and test a theoretical model proposing that wine consumption may be dependent on differences in consumer expertise, the hospitality situation, characteristics of the wine itself and an interaction of these variables.

Design/methodology/approach – Three empirical studies (total sample size = 356) tested these theoretical propositions. Consumers with varying levels of wine knowledge were presented with experimental vignettes showing videos of wine opening and pouring and were asked to pair wines with hospitality situations.

Findings – Study 1 found that consumers with low product knowledge were more sensitive to hospitality situations and extrinsic product attributes (closures) than were the experts. Study 2 found that wine hospitality situations fall into three predicted categories, namely, food, friends and formality, although contrary to prediction, the presence of food was the weakest predictor. Study 3 demonstrated the robustness of the three-dimensional structure of wine hospitality situations.

Practical implications – These studies provided important practical information because targeting various market segments requires the industry to know what product attributes are favored by different groups of consumers different situations.

Originality/value – Previous researchers have discussed the difficulty of measuring consumption situations. By limiting these studies to wine consumption within hospitality situations, the authors learned much about how consumers’ characteristics, product attributes and the situations interact to influence not only product assessments but also choices.

Keywords Hospitality situations, Extrinsic and intrinsic product attributes, Wine closures, Wine expertise

Paper type Research paper

Introduction

There are many traditions regarding the consumption of wine. These traditions often have powerful influences on the perceived appropriateness of a particular type of wine in a
particular situation. As an example, for a beef entrée, serving red wine is usually considered appropriate, whereas white wine is often a suitable match for fish and seafood dishes. In addition to food and wine pairing, certain consumption situations may call for a specific type of wine. Champagne, for example, tends to be seen as a drink of celebration and is often served symbolically to emphasize accomplishments. On the contrary, consumers may perceive certain wine types unsuitable for certain situations. For instance, Charters et al. (2011) found that respondents in their study unanimously thought that serving champagne or sparkling wine at a funeral would be very inappropriate.

The importance of such traditions varies among consumers and situations. In this study, we selected some hospitality situations and investigated their influences on consumer assessment of wine. We proposed and tested three dimensions of wine-related consumption situations and explored differences in information used by experts and novices when making assessments of these situations.

The research provided further support for the people-product-situation framework in the wine consumption context. The model proposed in this study could be a useful tool for a variety of situational assessments of wine consumers. In addition, the study highlighted various dimensions of hospitality and the role it plays concerning wine. Although there have been numerous studies integrating hospitality and wine consumption, this study reinforces the link between the two.

**Theoretical framework**

*Attributes: people, products and situations*

There is a rich history of research concerning the interactions among people, products and situations. Research into decision-making has led to the development of the elaboration likelihood model (ELM) of consumer information processing. ELM focuses on consumers’ inclinations to make decisions by processing information through either “central” or “peripheral” processing “routes” (Petty and Brinol, 2011). It posits that consumers with higher levels of involvement in and knowledge of a product category are more likely to use a central (more elaborate) processing route to make judgments about products. Those who are less involved and/or less knowledgeable are likely to use a peripheral processing route[1]. In a classic study of consumer information processing, Alba and Hutchinson (1987) found that experts can process more information, in more detail, and do so more quickly than novices. Also, experts tend to use information that is inherent (intrinsic) to products, such as features and functions, whereas novices tend to use peripheral (extrinsic) information, such as prices, packaging and brands. Their evaluation approaches differ as well – novices are more holistic, whereas experts are more analytic. For these reasons, we have chosen the level of expertise (experts versus novices) with the product category (wine) to serve as peoples’ attributes in our study.

The distinction between the types of information used by experts and novices led us to focus on extrinsic versus intrinsic product attributes. Extrinsic attributes of wine can strongly influence the evaluations of intrinsic sensory characteristics (Lange et al., 2000; Mueller et al., 2010). Therefore, under our framework, we suggest that intrinsic product attributes are sources of influence on the assessments of extrinsic attributes of wine.

The last component of the paradigm is the “situation” – a notion commonly known as a combination of circumstances that occur concerning one another. The term by itself is too broad to have a clear operational meaning, so researchers have typically used compound terms to narrow the domain of appropriate circumstances (e.g. purchase situations, disposal situations, consumption situations, etc.). We focused on wine consumption situations.
Wine and hospitality

Previously, frequently examined wine consumption situations included classifications by occasion (e.g. birthday party/celebration), place (e.g. at home/restaurant/bar), people (e.g. with friends/family/self), formality (e.g. casual/fine dining/picnic), ceremonial context (e.g. sacramental), time (e.g. lunch/dinner), etc. The domain of wine consumption situations is multifaceted. The innovative angle that we take in this research is an investigation of wine consumption situations through the overarching theme of hospitality. We believe that a link between wine and hospitality is vital to the understanding of wine markets.

The term “hospitality” is commonly associated with both the provision and consumption of food/beverage or accommodation in a commercial sense (Williams, 2002). Lashley and Morrison (2000, p. 3) note “current preoccupation with commercial provision”, in that hospitality is widely perceived, researched and taught as an economic activity (sets of consumers and suppliers). However, hospitality is a series of behaviors (primarily involving mutuality and exchange) which originate with the very foundations of society (Lashley and Morrison, 2000). The traditional (archaic) understanding of hospitality is rooted in the building of bonds among individuals and the turning of strangers into friends; thus, the act of hospitality becomes a bedrock upon which ancient cultures developed (Scott, 2006).

Implicit in this understanding is a dichotomy between hospitality as a private act (the socialization of the stranger) and commercial transaction (the economic value added to the provision of food/beverage or accommodation) (Scott, 2006). Regardless of the context, a central aspect of hospitality is that people, both as recipients of physical aspects of hospitality (e.g. food/beverages) and as players in the socialization processes. Hospitality encompasses “symbolic performances, marked by affective and expressive acts” (Bugge, 2005, p. 5). Therefore, hospitality includes ritual performances.

Wine consumption is part of the ritualized acts of hospitality. Just as hospitality is much more than the provision of food/beverage or accommodation, wine consumption encompasses much more than the mere intake of wine. It embraces all three domains of hospitality suggested by Lashley and Morrison (2000) – social, private and commercial. The social domain of hospitality considers social settings in which acts of hospitableness take place. Consider a group of friends sharing a bottle of wine over a casual get-together. In such a social situation, wine (and food) becomes a means of binding people together, thus helping create a collective identity of the group. The private domain of hospitality reflects the impact of host-guest relationships. When offering wine to guests at a party, the hosts provide acts of hospitality as a means of communicating welcome, goodwill, generosity and friendliness. Finally, the commercial domain of hospitality concerns economic activities in both the private and public sectors. Wine consumed at a dinner party at a restaurant exemplifies the commercial provision of hospitality (Bruwer et al., 2017).

To conclude, the fundamental notion of hospitality is sharing and provision with others. We take this idea as the key approach to our examination of wine consumption situations.

General theoretical proposition
Pulling together the core aspects of the people-product-situations paradigm, we propose an application of this framework to consumer assessment of wine in various hospitality situations. Specifically, we suggest that perceptions of hospitality situations directly influence consumer evaluations of extrinsic wine attributes. Both intrinsic product attributes and consumers’ expertise with wine moderate this relationship. Additionally, both intrinsic product attributes and consumer expertise have direct influences on evaluations of extrinsic product attributes. Figure 1 illustrates a general person-product-situation
framework (on the left) and our theoretical proposition for this framework’s application to consumer evaluations of wine attributes (on the right).

Paper structure
Three studies are presented herewith to investigate this theoretical proposition. Study 1 tests specific research hypotheses derived from the theory. Study 2 focuses on three proposed dimensions of hospitality situations. Study 3 uses results from the first two studies to propose a structure of consumer information for assessing wine products in various situations.

Study 1: wine, hospitality situations and expertise
Research objectives
The objective of this study was to produce an empirical test of the people-product-situations framework in the context of wine markets.

Hospitality situations
The first of the three broad sources of influence in the framework is the consumption situation for the product. In the research literature, we found a variety of wine consumption situations, many being related to consumer characteristics, such as product involvement (Quester and Smart, 1998), values and consequences (Hall et al., 2001), social identity and susceptibility to normative influences (Orth, 2006) and demographics/consumption behavior (Thach, 2011). For our study, we have selected a broad range of situations to capture a variety of hospitality circumstances. The goal was to examine how influential these situations are on consumers’ assessment of specific wine attributes.

Extrinsic product attributes
For extrinsic product attributes, we decided to examine wine closures (corks versus screwcaps). Corks are a classic type of closure for wine packages that are traditionally associated with better quality and more expensive wine (Barber and Almanza, 2007; Marin and Durham, 2007; Marin et al., 2007; Wilson, 2009). Recently, however, screwcaps have become pervasive in some markets and are now making inroads, even where they were once considered negative indicators of wine quality (Halstead, 2011). Screwcap closures provide some significant practical advantages, including the avoidance of cork taint (Barber and Almanza, 2007). However, many consumers still resist non-traditional forms of packaging and continue to prefer the romance and drama of opening cork closures (Atkin et al., 2006).
Consumer perceptions of alternative closures receive attention in the wine marketing literature because those perceptions continue to evolve within and among markets. Nevertheless, to the best of our knowledge, no previous study has specifically examined consumers’ perceptions of the appropriateness of closures for various consumption situations. Therefore, we propose our basic research hypothesis:

RH1. Hospitality situations will influence the appropriateness of wine closures.

Intrinsic product attributes
Intrinsic wine attributes may include a multitude of features, such as grape varieties, levels of alcohol and residual sugar, tannins, blends and winemaking styles. However, including multiple attributes would have increased the level of complexity for respondents to the point of being counter-productive because it would likely cause information overload. Therefore, we limited intrinsic product attributes to the basic types of wine. We examine three most often consumed wine types (red, white and sparkling). The reason for including sparkling wine was its strong association with certain hospitality situations, such as celebrations (Charters et al., 2011). Thus, we propose the following research hypotheses:

RH2. The type of wine will moderate consumer assessment of wine closures in hospitality situations.

RH3. The type of wine will directly influence assessments of wine closures appropriateness.

Consumer expertise
For our study, the ELM underlies the logic of the relationship between consumer expertise and perceptions of appropriateness for wine closures. The significance of wine consumer expertise has been studied extensively (Aurier and Ngobo, 1999; Dodd et al., 2005; Mueller et al., 2008; Viot, 2012). Such studies have confirmed that expert and novice consumers differ in the amount, content and organization of their wine knowledge. This is important because targeting various market segments effectively requires the industry to know what product attributes are favored by different groups of consumers. As wine experts and novices are known to differ in their use of different product attributes, we expected that their attitudes regarding wine bottle closures might also differ for different hospitality situations. Thus, we propose the following research hypotheses (Figure 2):

Figure 2.
Research model for the person, product and consumption situations influences on relative appropriateness of wine bottle closures
RH4. Levels of consumer expertise will moderate the relationship between hospitality situations and the appropriateness of wine closures.

RH5. Levels of consumer expertise will directly influence the appropriateness of wine closures.

Method

Study design
An experimental vignette study was designed to test the model. Vignettes are brief descriptions of scenarios that systematically include combinations of conditions under investigation. The experimental vignette method (EVM) provides much of the ability to control some variables while manipulating others, which is necessary for the investigation of causality, thus strengthening internal validity. It also provides greater realism, which enhances the generalizability of results by strengthening external validity (Atzmüller and Steiner, 2010).

Our design used a full factorial set of conditions, including 12 hospitality situations, 3 types of wine and 2 levels of consumer expertise. Each respondent assessed 36 vignettes (a within-subjects or repeated measures design), and they were grouped into two levels of consumer expertise (between or among subjects measures). We collected additional data regarding consumer demographics, behavior, product category involvement and knowledge.

Measures and manipulations

Appropriateness: The dependent variable (DV) was the perceived appropriateness of extrinsic product attributes – package closures. Measurements for corks and screwcaps were collected separately by using semantic differential scales ranging from “very inappropriate” (1) to “very appropriate” (5) for each of the 36 combinations of hospitality situations and types of wine. The value for appropriateness in each combination is the difference between the score for corks and screwcaps. The resulting differences indicate, at one extreme, that corks are much more appropriate than caps (a cork score of 5 minus a screwcap score of 1 equals +4); and at the other extreme that screwcaps are more appropriate than corks (a cork score of 1 minus a screwcap score of 5 equals −4). The middle of the scale indicates that there is no difference in the levels of perceived appropriateness (e.g. the difference between a cork value of 5 and a screwcap value of 5 is 0, similarly 4 − 4 = 0).

Expertise groups: Alba and Hutchinson (1987) found that consumer knowledge comprises two parts, namely, expertise and product familiarity. Familiarity is the number of product-category-related experiences that a consumer has accumulated. It was found to positively influence expertise by improving:

- consumers’ ability to process product-related information; and
- the speed with which they can process it.

We argue that consumers’ levels of involvement with a product category positively influence the likelihood of having experiences within that category, which in turn leads to greater familiarity, knowledge, and therefore, expertise. For this study, five indicators were used to assess consumer expertise: wine involvement, purchase frequency, consumption frequency, years of experience with wine consumption and wine knowledge. The items for
assessment of wine involvement were adapted from Slama and Tashchian (1987), and wine knowledge items were adapted from Smith and Park (1992).

Hospitality situations: Based on an extensive review of wine research literature, we selected 12 hospitality situations:
   1. Going out with friends
   2. Celebration-wedding
   3. Dinner party at home
   4. Picnics
   5. Dinner party with friends
   6. Holiday events
   7. Casual everyday use
   8. Gift giving
   9. Attending a dinner party
  10. Dinner for two
  11. Casual get together
  12. Restaurant with clients

Wine type: The most important intrinsic attribute of wine – its type – was used, with three different wine types tested – red, white and sparkling wine.

Data collection
Data from both the high and low expertise groups were collected through an online presentation of the vignettes and questions. To enhance the realism of the vignettes, we used six short videos averaging 35 s each. The videos showed the opening of traditional (750 mL) wine bottles with corks and screwcaps. They were presented in pairs by types of wine (e.g. a cork video for the white wine paired with a screwcap video for white wine) that were embedded at appropriate points in the questionnaire to provide a context for specific questions and responses about each type of wine. The videos provided a visual and audio experience of the differences between opening each type of closure. They also focused the respondent’s attention on the appropriate type of wine and closure for each stage of the data collection. As a control, labels were removed from the bottles shown in the videos. After viewing each pair of videos, the respondents assessed the appropriateness of each type of closure for that particular type of wine in each of the 12 hospitality situations. Please see Figure 3 for the screenshots of each video.

Results
Sample and data hygiene
The subjects were selected to represent consumers with different levels of expertise with wine. We sought the high expertise sample among winemakers, growers and wine industry suppliers who were contacted through a grower’s association conference and an enology network membership list. Consumers who self-identified as being interested and involved in wine were also included. They were contacted through their affiliation with a wine specialty retail shop and its wine club membership list. The non-expert (novice) sample came from students attending a large university in southwest USA. The students were chosen because they typically have less experience with wine and they have not self-selected as interested in wine. There were 135 usable responses from the presumed low expertise group and 82 from
the presumed high expertise group, for a total of 217. The novice and expert groups were not significantly different regarding gender, but as expected, they differed in age and preferences for wine. No anomalies in the data and no out-of-range values (outliers) were found. Fewer than 10 per cent of the values were missing for any of the variables. Because of this low incidence, mean-substitution was applied to missing values.

**Confirmation of expertise groups**

The presumption that the two groups were different in their levels of expertise was tested by using five indicators: purchase frequency, consumption frequency, years of experience with wine, involvement with wine and knowledge about wine. The means of these indicators for each group were significantly different in the directions expected. The correlations among the variables were all positive and significant (a mean of 0.64 and a median of 0.67) providing some indication of convergent validity of these measures (converging on the concept of expertise). A logistic regression analysis was performed with these indicators, and the resulting model was 96.8 per cent accurate in classifying individuals into the two expertise groups.
Examination of appropriateness

The next stage of analysis focused on the perceived levels of closures appropriateness. The means within each category for each of the exogenous constructs (expertise, wine type and situation) and their significance levels are listed from highest to lowest within each construct in Table I, along with two different types of means comparisons. The first comparison is the significance of the difference for each category mean against a null (test) hypothesis of zero (indicating that there is no difference between the appropriateness of corks and screwcaps). Significant differences are indicated with an asterisk. All, but three means, are significantly different from zero and have positive signs. The exceptions are:

- “casual get together,” which is not significantly different from zero; and
- “casual everyday use” and “picnics,” which are significantly different.

The second comparison was among the appropriateness scores within each of the constructs (wine types, expertise levels and situations). For instance, the means for types of wines show that the appropriateness of corks is greater for red wines than for white wines and fall between for sparkling wines.

Tests of propositions

Next, we tested the research hypotheses. The data were composed of a DV with interval level data, two independent variables (IVs) with categorical data and one IV with ordinal data. We controlled for the effects of individual respondent tendencies by including respondent IDs in the analysis as a covariate. Table II presents the ANOVA results. The main effects and interaction terms were all significant at $p < 0.001$, except for the interaction of hospitality situation and wine type. These results provide empirical support for four of the five research hypotheses.

Given the relatively large numbers of degrees of freedom (total df = 7,812), the levels of statistical significance tell only part of the story in these data. Therefore, we also examined

<table>
<thead>
<tr>
<th>Constructs</th>
<th>Categories</th>
<th>Category means</th>
<th>Difference within constructs</th>
</tr>
</thead>
<tbody>
<tr>
<td>Expertise levels</td>
<td>Expert</td>
<td>1.081*</td>
<td>$F = 9.87$</td>
</tr>
<tr>
<td></td>
<td>Novice</td>
<td>0.923*</td>
<td>$p = 0.002$</td>
</tr>
<tr>
<td>Wine types</td>
<td>Red</td>
<td>1.166*</td>
<td>$F = 20.66$</td>
</tr>
<tr>
<td></td>
<td>Sparkling</td>
<td>1.077*</td>
<td>$p &lt; 0.001$</td>
</tr>
<tr>
<td></td>
<td>White</td>
<td>0.763*</td>
<td></td>
</tr>
<tr>
<td>Hospitality situations</td>
<td>Restaurant with clients</td>
<td>2.075*</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Gift giving</td>
<td>1.952*</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Celebration wedding</td>
<td>1.928*</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Dinner for two</td>
<td>1.580*</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Attending a dinner party</td>
<td>1.560*</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Holiday events</td>
<td>1.462*</td>
<td>$F = 197.13$</td>
</tr>
<tr>
<td></td>
<td>Dinner party with friends</td>
<td>1.053*</td>
<td>$p &lt; 0.001$</td>
</tr>
<tr>
<td></td>
<td>Dinner party at home</td>
<td>0.924*</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Going out with friends</td>
<td>0.442*</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Casual get together</td>
<td>0.001</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Casual everyday use</td>
<td>-0.426*</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Picnics</td>
<td>-0.527*</td>
<td></td>
</tr>
</tbody>
</table>

Table I.

Perceived appropriateness of corks (+4) or screwcaps (−4)

Note: *Difference from 0 sig. at $p \leq 0.05$
the effect sizes using the partial eta squared ($\eta^2$) values. Partial $\eta^2$ values are presented in Table II to provide additional insight into the role of each source of influence. Various standards have been recommended for the interpretation of partial $\eta^2$. We used Cohen’s (1988) generally accepted standards for interpretation with multiple IVs (Table III):

In Table II under Source Effects, we can see that Hospitality Situation and the interaction of Hospitality Situation with Expertise Group standout as the greatest sources of influence. We also see that Respondent ID, the control for individual respondent tendencies, was significant but it had a trivial influence.

**Summary of Study 1**

The significant interaction between Expertise and Hospitality Situations and the lack of significance for the interaction between Wine Type and Hospitality Situation are shown in Figure 4.

The novice group with a much wider range of appropriateness scores is more sensitive to situations than the expert group. This is consistent with the notion that novice consumers are more responsive to non-intrinsic attributes when making product assessments. Clearly, this framework based on the ELM provides a useful lens through which to examine wine consumption attitudes. The hospitality situations and their interactions with the expertise levels of consumers are the strongest sources of influence regarding the appropriateness of wine closures.

### Table II.

<table>
<thead>
<tr>
<th>Source Effects</th>
<th>Type III sum of squares</th>
<th>df</th>
<th>Mean square</th>
<th>F</th>
<th>Significance</th>
<th>Partial $\eta^2$</th>
<th>Source effects</th>
</tr>
</thead>
<tbody>
<tr>
<td>Corrected model</td>
<td>10,253.8</td>
<td>48</td>
<td>213.6</td>
<td>63.4</td>
<td>0.000</td>
<td>0.281</td>
<td>Large</td>
</tr>
<tr>
<td>Intercept</td>
<td>1,336.6</td>
<td>1</td>
<td>1,336.6</td>
<td>396.4</td>
<td>0.000</td>
<td>0.049</td>
<td></td>
</tr>
<tr>
<td>RH1 Hospitality situation</td>
<td>5,797.4</td>
<td>11</td>
<td>527.0</td>
<td>156.3</td>
<td>0.000</td>
<td>0.181</td>
<td>Medium</td>
</tr>
<tr>
<td>RH2 Wine type * hospitality situation</td>
<td>130.6</td>
<td>22</td>
<td>5.9</td>
<td>1.8</td>
<td>0.015</td>
<td>0.005</td>
<td>Trivial</td>
</tr>
<tr>
<td>RH3 Wine type</td>
<td>191.8</td>
<td>2</td>
<td>95.9</td>
<td>28.4</td>
<td>0.000</td>
<td>0.007</td>
<td>Trivial</td>
</tr>
<tr>
<td>RH4 Hospitality situation * expertise group</td>
<td>1,863.8</td>
<td>11</td>
<td>169.4</td>
<td>50.2</td>
<td>0.000</td>
<td>0.066</td>
<td>Small</td>
</tr>
<tr>
<td>RH5 Expertise group</td>
<td>47.4</td>
<td>1</td>
<td>47.4</td>
<td>14.1</td>
<td>0.000</td>
<td>0.002</td>
<td>Trivial</td>
</tr>
<tr>
<td>Respondent ID</td>
<td>97.2</td>
<td>1</td>
<td>97.2</td>
<td>28.8</td>
<td>0.000</td>
<td>0.004</td>
<td>Trivial</td>
</tr>
<tr>
<td>Error</td>
<td>26,175.7</td>
<td>7,763</td>
<td>3.4</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total</td>
<td>43,975.5</td>
<td>7,812</td>
<td>43,975.5</td>
<td>7,812</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Corrected total</td>
<td>36,429.5</td>
<td>7,811</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Note:** $R^2 = 0.281$ (Adjusted $R^2 = 0.277$)

### Value range and effect size

<table>
<thead>
<tr>
<th>Value range</th>
<th>Effect size</th>
</tr>
</thead>
<tbody>
<tr>
<td>$0.26 = \eta^2$</td>
<td>Large</td>
</tr>
<tr>
<td>$0.13 = \eta^2 &lt; 0.26$</td>
<td>Medium</td>
</tr>
<tr>
<td>$0.02 = \eta^2 &lt; 0.13$</td>
<td>Small</td>
</tr>
<tr>
<td>$\eta^2 &lt; 0.02$</td>
<td>Trivial</td>
</tr>
</tbody>
</table>

Table III.
Study 2: dimensions of hospitality situations

Research objectives
Hospitality situations were the dominant source of influence found in Study 1. However, consumption situations are multidimensional, which can make it difficult to generalize findings from one research context to another. The focus of this study was on identifying generalizable dimensions of the situations that can be useful for understanding wine consumer attitudes. We re-examined wine research literature seeking potential theoretical dimensions of hospitality situations associated with wine consumption. We found three dimensions that warranted further examination. We then developed an additional survey instrument to gather assessments of each of the three dimensions in the 12 hospitality situations. The resulting assessments of dimensions were substituted for the categorical indications of situations in a re-analysis of the data from Study 1. This was a semi-exploratory study intended to produce more generalizable results.

Situations dimensions
The first of the three identified dimensions is food consumption, which has been used as a basis for differentiating among wine situations (Hall et al., 2001; Quester and Smart, 1998; Thach, 2011). We labeled this dimension simply Food. The second dimension is the level of social interaction in a situation (Orth, 2006; Quester and Smart, 1998). We labeled that dimension Friends. Study 1 revealed a possible third dimension, where the three highest scores for appropriateness were for the “restaurant with a client,” “gift giving” and “celebration-wedding” situations; and the three lowest scores reported were for the “picnics,” “casual everyday use” and “casual get-together.” These differences indicated the third dimension, which we labeled Formality. Thus, drawing from both existing literature sources and Study 1 results, we propose the following three dimensions for the wine-hospitality context situations:

1. Food: Hospitality situations often involve eating and perhaps preparing meals. In these circumstances, the intrinsic characteristics of the wine (e.g. sweetness, acidity, carbonation and color) can influence the taste and the appearance of a meal; thus, these characteristics are important to food-related situations. The pairing of food and wine flavors may strongly influence the perceived
The appropriateness of a wine. This dimension indicates whether food is influential to the hospitality situation.

(2) **Friends**: Hospitality situations may be prominent social occasions involving family, friends and/or acquaintances. The appropriateness of wine products is often determined by the presumed preferences and attitudes of the people gathered. It also raises the potential social risk of serving wine that some may perceive as inferior. This dimension indicates many or fewer individuals present, giving the social dimension of the situation more or less influence on assessments of appropriateness.

(3) **Formality**: In some hospitality situations, bottles of wine are presented to hosts or guests of honor and opened for the occasion. So, the extrinsic characteristics of the wine (e.g. packaging or label) are more noticeable, and thus, are more important. Risk aversion tendencies in consumers may tilt preferences toward a more traditional presentation of wine in more formal situations. This dimension indicates whether the hospitality situation is low or high in its level of formality.

**Interactions among dimensions**
Situational attributes can interact with intra-individual and product attributes. When this occurs, it is referred to as a “person-within-situation interaction” (Quester and Smart, 1998). For instance, the relevance of a product’s origin identity may be dependent on the product category, the consumer’s knowledge of that category and the availability of the origin information.

**Method**

**Measures**
A new questionnaire was developed, in which respondents were asked to assess each of the three dimensions for each of the 12 hospitality situations, using semantic differential scales (Table IV).

**Results**

**Sample and assessments of dimensions**
Data were collected from a new sample and yielded 139 responses. An analysis for anomalies found no outliers. Fewer than 10 per cent of the item responses were missing, so mean substitution was applied.

As the purpose of Study 2 was to enhance the interpretability and generalizability of the results of Study 1, we chose to use ordinal summary assessments (high/low) on each dimension. These were determined by first calculating the averages for each of the combinations across the respondents. A median split was then used to identify either “high” or “low” on each dimension in each situation[3]. Figure 5 presents the high-low values for each of the 12 hospitality situations.

<table>
<thead>
<tr>
<th>“Food” dimension</th>
<th>“To what degree does this activity involve food consumption?”</th>
<th>Never/Always</th>
</tr>
</thead>
<tbody>
<tr>
<td>“Friends” dimension</td>
<td>“To what degree is this event social?”</td>
<td>Not at all social/Extremely social</td>
</tr>
<tr>
<td>“Formality” dimension</td>
<td>“To what degree is this activity formal?”</td>
<td>Not at all formal/Extremely formal</td>
</tr>
</tbody>
</table>

Table IV.
Re-analysis with food-friends-formality assessments for hospitality situations

The assessments of the three dimensions were substituted for the single variable “hospitality situation” in the data from Study 1. The results of the re-analysis are presented in Table V. We see that nearly all of the variables and combinations of variables are statistically significant, primarily because of a large number of degrees of freedom available.

Table V.
Study 2 ANOVA results

<table>
<thead>
<tr>
<th>Source</th>
<th>Type III sum of squares</th>
<th>df</th>
<th>Mean square</th>
<th>F</th>
<th>Sig.</th>
<th>Partial $\eta^2$</th>
<th>Source effects</th>
</tr>
</thead>
<tbody>
<tr>
<td>Corrected model</td>
<td>9,674.108*</td>
<td>19</td>
<td>509.164</td>
<td>148.284</td>
<td>0.000</td>
<td>0.266</td>
<td>Large</td>
</tr>
<tr>
<td>Intercept</td>
<td>1,336.561</td>
<td>1</td>
<td>1,336.561</td>
<td>389.247</td>
<td>0.000</td>
<td>0.048</td>
<td>Small</td>
</tr>
<tr>
<td>Food</td>
<td>0.706</td>
<td>1</td>
<td>0.706</td>
<td>0.206</td>
<td>0.650</td>
<td>0.000</td>
<td>None</td>
</tr>
<tr>
<td>Friends</td>
<td>261.019</td>
<td>1</td>
<td>261.019</td>
<td>76.017</td>
<td>0.000</td>
<td>0.010</td>
<td>Trivial</td>
</tr>
<tr>
<td>* Formality</td>
<td>4,132.812</td>
<td>1</td>
<td>4,132.812</td>
<td>1,203.601</td>
<td>0.000</td>
<td>0.134</td>
<td>Medium</td>
</tr>
<tr>
<td>Food * formality</td>
<td>45.408</td>
<td>1</td>
<td>45.408</td>
<td>13.224</td>
<td>0.000</td>
<td>0.002</td>
<td>Trivial</td>
</tr>
<tr>
<td>Food * friends</td>
<td>78.307</td>
<td>1</td>
<td>78.307</td>
<td>22.805</td>
<td>0.000</td>
<td>0.003</td>
<td>Trivial</td>
</tr>
<tr>
<td>Friends * formality</td>
<td>889.743</td>
<td>1</td>
<td>889.743</td>
<td>259.120</td>
<td>0.000</td>
<td>0.032</td>
<td>Small</td>
</tr>
<tr>
<td>Expert group</td>
<td>47.381</td>
<td>1</td>
<td>47.381</td>
<td>13.799</td>
<td>0.000</td>
<td>0.002</td>
<td>Trivial</td>
</tr>
<tr>
<td>Expert group * food</td>
<td>99.509</td>
<td>1</td>
<td>99.509</td>
<td>28.980</td>
<td>0.000</td>
<td>0.004</td>
<td>Small</td>
</tr>
<tr>
<td>Expert group * formality</td>
<td>1,530.318</td>
<td>1</td>
<td>1,530.318</td>
<td>445.675</td>
<td>0.000</td>
<td>0.054</td>
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<tr>
<td>Expert group * friends</td>
<td>94.668</td>
<td>1</td>
<td>94.668</td>
<td>27.570</td>
<td>0.000</td>
<td>0.004</td>
<td>Small</td>
</tr>
<tr>
<td>Wine type</td>
<td>191.753</td>
<td>2</td>
<td>95.877</td>
<td>27.922</td>
<td>0.000</td>
<td>0.007</td>
<td>Small</td>
</tr>
<tr>
<td>Food * wine type</td>
<td>14.261</td>
<td>2</td>
<td>7.130</td>
<td>2.077</td>
<td>0.125</td>
<td>0.001</td>
<td>Trivial</td>
</tr>
<tr>
<td>Formality * wine type</td>
<td>30.077</td>
<td>2</td>
<td>15.038</td>
<td>4.380</td>
<td>0.013</td>
<td>0.001</td>
<td>Small</td>
</tr>
<tr>
<td>Friends * wine type</td>
<td>6.302</td>
<td>2</td>
<td>3.151</td>
<td>0.918</td>
<td>0.400</td>
<td>0.000</td>
<td>None</td>
</tr>
<tr>
<td>Random ID</td>
<td>97.242</td>
<td>1</td>
<td>97.242</td>
<td>28.320</td>
<td>0.000</td>
<td>0.004</td>
<td>Trivial</td>
</tr>
<tr>
<td>Error</td>
<td>26,755.430</td>
<td>7,792</td>
<td>3.434</td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>Total</td>
<td>43,975.527</td>
<td>7,812</td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>Corrected total</td>
<td>36,429.538</td>
<td>7,811</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
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</table>

Note: $^aR^2 = 0.266$ (Adjusted $R^2 = 0.264$)
for the significance tests. Hence, we again use partial $\eta^2$ to assess the source effects. There is a similar pattern in the two studies; some aspect of hospitality situations (formality) and interactions with it are the dominant sources of influence. The predominant dimension in the re-analyzed model is formality. Indeed, formality and the interactions with both expertise group and friends comprise all of the nontrivial sources of influence in this model. The only compromise in using this approach is the loss of approximately 1.5 per cent points of explained variance.

Summary of Study 2
The positive result from Study 2 is that we can interpret wine-hospitality situations in terms of their underlying dimensions that are more generalizable and more easily understood. On the other hand, when hospitality situations are formal, there is generally a greater concern for tradition and appropriateness of the accouterments of the occasion.

A surprise in these results found the complete uselessness of food in explaining any variance. Food would seem to be a logical influence on the appropriateness of corks or screwcaps, especially as wine is often opened at the table and served from the bottle throughout the meal. Perhaps, this lack of influence is because food is arguably a part of most of the hospitality situations, and hence, it does not differentiate among situations well. It may also be that too little information regarding the nature of the food was presented in the study. Hospitality situations in which food is central to the occasion are typically focused on the flavors, textures, temperatures and other intrinsic characteristics of what is being consumed. The skillful blending of these attributes is key to the success of many occasions. It follows that the intrinsic characteristics of the wine might dominate what is important in such situations and that closure types would be less relevant. Indeed, in some food-centered situations, wine is often served in carafes or by the glass, and the nature of the wine package closure is mostly unknown. At gatherings, where many people are present, a variety of wines are often served, especially if the occasion is not focused on food. As a result, many guests may be unaware of the nature of the package closures and/or can choose one or the other.

Study 3: information structures for assessment of the wine-hospitality context
Research objectives
The objective of Study 3 was to gather what we have learned in the first two studies and to investigate the nature of information used for assessments in the wine-hospitality context. Information processing literature indicates that consumers with different levels of expertise process information differently. Additionally, we found that interactions between expertise levels and other factors have significant effect sizes. As a result, we separated our analysis of these data by expertise group.

Method
Using the data in hand from Studies 1 and 2, we used factor analysis as an exploration tool. The first step was to examine the data for their suitability for factor analysis. The Keyser–Meyer–Olkin (KMO) measure of sample adequacy for the novice group was 0.795 and for the expert group, it was 0.831. The Bartlett’s test of sphericity was highly significant in both cases ($p < 0.001$), indicating that the samples for each group were adequate for factor analysis. The next consideration was the types of extraction and rotation processes. Oblique rotations are often recommended for exploratory analysis of social science phenomena because dimensions of such phenomena are often not independent of one another; thus, more realistic insights are likely to result from non-orthogonal analyses. Therefore, we used
principal axis factoring for the extraction process and direct Oblimin with Kaiser Normalization for the rotations. For the novice data, eight factors with Eigenvalues greater than 1.0 were found; for the expert data, there were four factors.

Interpretation of factors

The interpretation of factors is often “an art” because many items and combinations of items are multidimensional, which can lead to ambiguity among the factors. To facilitate the interpretation of factors, we modified the labels for each variable to include abbreviations indicating the food-friends-formality (FFF) dimensions and the wine types. The first three letters indicate the level (H = high, L = low) for each of the hospitality situation dimensions, food, friends and formality, respectively. The fourth letter indicates the wine type (R = red, W = white, S = sparkling). The procedure for interpreting these factors was based on:

- the situation dimensions described above; and
- the correlations among the factors.

First, we considered the attribute levels of the hospitality situations. Each factor was examined to determine if there were common attributes among the hospitality situations that constitute that factor. For instance, some factors may include situations that are all informal, and all of them involve sparkling wine. In such a case, we could easily label the factor “informal situations and sparkling wine.” This approach provides each factor with a name that is indicative of its predominant attributes. Second, we considered the correlations among factors. If factors correlated with related attributes (e.g. high/low formality), then their factor correlations may be an empirical basis for developing a taxonomy of wine hospitality situations.

Results

Expert group

Figure 6 presents the results for the expert group. The loadings of 0.5 or higher are shown, and the apparent grouping of product situation attributes (the four left-hand columns) are presented in bold type and outlined. In this case, the interpretation of the factors is clear and simple. Three of the four factors have only one consistent attribute among the situations, and in each case, the dominant attribute is the type of wine. Factor E1 (the first factor from the experts) is labeled “red wine,” factor E2 is “sparkling wine” and factor E4 is “white wine.” Factor E3 is a combination of “informal hospitality situations and red wine.” The experts’ perceptions of appropriateness are focused on intrinsic characteristics of the wine rather than on hospitality situations. This is consistent with results of Aurier and Ngobo (1999) and Viot (2012) that expert consumers attach more value to intrinsic characteristics of wine.

The factor correlations from the expert group indicate that red and white wine (factors 1 and 4) have a 0.57 correlation, while factor 3 (casual red) is not significantly correlated with any other factor. Additionally, the red and white wine factors have some strong cross-loadings. Factors 2 (sparkling) and 1 (red) are correlated at 0.29 and factors 2 and 4 (white) at 0.34. This pattern also suggests a two-level categorization of hospitality situations for expert consumers – differentiation between sparkling wines and still wines, as well as between red and white wine.

Novice group

Figure 7 presents the results for the novice group. Seven of the eight factors clearly relate to two or more dimensions, so the names for them reflect the FFF dimensions and/or the wine type that reflects the predominate dimensions. The situations that comprise the first factor have a
higher social content (many friends), generally have a high level of formality and food is generally peripheral to the situation. Factor N2 consists entirely of items related to sparkling wine and less formal situations. The factor N3 was also entirely sparkling wine-related, but casual situations (low formality). Factor N4 has situations involving many friends and generally low formality. The items loaded on factor N5 were informal and situations in which food is peripheral. Factor N6 items involve few friends. Factors N7 and N8 both involve white wine, while factor N7 items are informal and factor N8 items are high in formality. Clearly, the interpretation of these factors is more complicated than for the expert group.
Summary of Study 3

This exploration of the dimensions of hospitality situations found that the food-friends-formality paradigm was indeed present in these data. However, there is also a strong presence of the types of wines as dimensions, especially for the expert respondents. Consistent with previous research, we have found that relevant situational attributes often vary radically across individuals and products. This has led to some frustration among researchers as they strive to create taxonomies of situational attributes that can provide generalizable insights. Despite the appeal of such taxonomies, the “fickle nature of situation research” (Quester and Smart, 1998, p. 221) has made it difficult. Indeed, the endeavor has been labeled “futile” by Hornik (1982, p. 46). Therefore, understanding the influence of situations on consumer decision-making is more practical and realistic if it is limited to specific contingencies. In this research, we limited the scope to the wine category and hospitality situations (Figure 8).
General discussion and conclusions

This research investigated the influence of corks versus screwcaps on the perceived appropriateness of wines for various hospitality situations. This research found support for the person-product-situation framework as an approach to understand the wine consumers. An empirical test of the model found that all of the propositions from the theory are statistically significant. Among the person-product-situation influences on the appropriateness of closure types, hospitality situations have the most substantial effect. The second largest effect comes from the interaction of situations and expertise with the product. Corks were generally viewed as more appropriate for red wines. This is consistent with our expectation based on the association of corks with food consumption and wine aging traditions. Novice consumers have higher variability than experts in their assessments of appropriateness among hospitality situations. This may indicate that non-experts rely more on peripheral cues (e.g. corks or screwcaps) when judging the appropriateness of wines for various situations. These findings are consistent with the ELM of consumer decision-making, which argues that those who are less
able to judge the intrinsic attributes of a product are more likely to rely on peripheral attributes that they can more easily understand. This research confirms the notion that hospitality situations are complex, and it also supports Halstead’s (2011) argument that neither corks nor screwcaps are likely to become the only type of wine closure. Instead, the use of corks and screwcaps is evolving to meet the needs of different types of wine, occasions and consumers.

Limitations, future research and industry implications

Certain limitations should be noted. First, this study was conducted in only one (USA) market. As wine consumption traditions are often deeply embedded in regional cultures, it may be risky to generalize these results to other cultures. We believe that expertise and intrinsic product characteristics probably influence judgments about wine consumption in all cultures, but the cultural meaning of corks and screwcaps may vary considerably across markets. That underscores the importance of further investigations of this issue in other cultures, as Atkin et al. (2006) noted, there are considerable differences in the acceptability of screwcaps in different countries. Additionally, the meaning associated with corks or screwcaps has changed over time, emphasizing the need to replicate similar studies across time. These differences can influence consumption behavior and should impact the marketing strategies of wineries and retailers.

The hospitality dimensions provide a useful framework for future research. There are opportunities for future research to examine the interaction of closures and situations and intrinsic product attributes such as different types of packaging or product labels that could impact perceptions and behavior.

The findings regarding hospitality and formality are particularly relevant for marketing strategies. Hospitality often includes ceremonial consumption (e.g. different forks for salads, main courses and deserts), which are meaningful to customers and often provide signals of other attributes such as quality or formality. The nature of closures for wine products is another of those signals to customers. This is important for hospitality service providers as they decide on the particular combinations of food/beverage attributed to put before their customers. Also, distribution decisions made for wine products can benefit from these results. Some channels are more likely to reach the market for home consumption, which is more likely to be a venue for informal consumption. Some channels may be more likely to reach hospitality venues where formal consumption is typical. These results can also benefit producers who may make their product/market decisions (positioning) via extrinsic attributes such as the type of packages, the labels and the closures for their wines. These often provide signals to customers who have to rely on extrinsic cues to judge the products.

Notes

1. A “route” is the sequence and type of information used in making an assessment or decision.
2. Partial $\eta^2$ is the proportion of variance associated with one or more main effects, errors or interactions that are included in an ANOVA.
3. Standardized means (to control for individual respondent tendencies) were also examined in this way; both approaches produce the same result.

References


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Wine attractions at hotels: study of online reviews

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Abstract

Purpose – The purpose of this study is to delineate the role of wine at hotels from the customer’s perspective by analyzing New York City hotel reviews posted on TripAdvisor.

Design/methodology/approach – This study used content analysis to study 26,831 wine-relevant reviews that had been posted on TripAdvisor’s New York City hotels by April 12, 2018. Two trained coders quantified and tallied the presence of themes based on the pre-established coding scheme.

Findings – Wine was mentioned in the online reviews in expressing positive, negative or neutral hotel experiences. Of the 877,616 New York City hotel reviews, about 3 per cent contained the keyword “wine.” The three most frequently mentioned wine-related positive experiences were free happy hours, a surprise bottle of complimentary wine and the fun of pairing food and wine. The top three wine-related negative experiences were pricey/expensive/overpriced wine, poor wine list and poor quality of wine. The study found that hotel guests liked wine and that it had become a significant aspect of their lodging experience.

Originality/value – This study adds value to the literature of hotel wines by divulging hotel customers’ wine-related experiences through their online comments and by providing a snapshot of hotel guests’ wine-drinking behavior. The findings can provide an insight for hotels to further the use of wine as a means to enhance guest experience and to generate additional revenue.

Keywords Wines, User-generated content, Content analysis, Hotel reviews, Online reviews analysis

Paper type Research paper

Introduction

The popularity of online customer reviews has created new opportunities for business operators to enhance customer satisfaction. Online reviews, in which customers turn to websites, social media and blogs to express their positive or negative feedback on service encounters, allow companies to obtain insights into what aspects of the services they provide satisfy or dissatisfy customers. For example, Marriott analyzed online reviews to understand consumer experience by hotel type and to further align brand attributes with each target segment (Cohen, 2018). Positive online reviews were found to be significantly associated with consumers’ booking intentions (Sparks and Browning, 2011) and hotels’ increased profitability (Ye et al., 2009). Online customer reviews are made available to other consumers, who may use the information for making their purchase decisions (Xie et al., 2016). In general, consumers consider user-generated online reviews more useful and trustworthy than information available on a company’s website (Ye et al., 2009); the
hospitality industry is no exception. Studies have indicated that approximately 90 per cent of travelers find online hotel reviews to be useful and accurate reflections of the actual experience (Gretzel and Yoo, 2008; Stringam et al., 2010; TripAdvisor, 2012). TripAdvisor’s study showed that 53 per cent of the survey respondents indicated that they would not book a hotel that had no reviews on its website (TripAdvisor, 2012). This finding clearly signals the importance of online customer reviews for purchase decisions and in helping hotel companies to improve their products and services.

Wine is one factor that plays a critical role for many people when they are traveling. A survey by Sheraton Hotels (2015) revealed that 60 per cent of respondents indicated that they drank the most wine when they were away from home. Of the survey respondents, 74 per cent reported that they were more adventurous in trying out new wines while they were traveling and were more likely to pay more for a premium glass or bottle of wine on such occasions (Sheraton, 2015). The survey also found that after a long day, nearly one out of two people (48 per cent) would rather reach for a glass of wine than their smartphone/tablet (15 per cent) or even their spouse (15 per cent) (Sheraton, 2015). This survey provides a promising opportunity for hotels to generate additional revenue by offering wine to cater to the needs of travelers and enhance their travel experience.

Studies of online hotel reviews have focused on uncovering the attributes or services customers experience, such as place of business (hotels, restaurants, outlets, clubs), staff, rooms, furnishings, architecture (Berezina et al., 2016; Ekiz et al., 2012), hotel location, room size, cleanliness, in-room facilities, comfort, service (O’Connor, 2010) and perception of the best green practices (Yi et al., 2018). However, none of these studies has examined hotel customers’ experience of wine as expressed in online hotel reviews. Customers tend to post when they have had extremely positive or extremely negative experiences (Cheung and Lee, 2012). An analysis of wine-related comments can provide insights that allow hotel managers to rethink the contribution of wine to guest experiences and to retain or attract customers. The purpose of this study is to delineate the roles of wine at hotels from the customer’s perspective by analyzing New York City hotel reviews posted on TripAdvisor. Can wine as a supplementary product add to, or detract from, a guest’s hotel experience? Specifically, this study is designed to:

- discover the features of wine that consumers will specifically include in their online hotel reviews;
- investigate whether wine can be used or served in a way that contributes to consumers’ positive hotel reviews; and
- investigate whether wine can be used or served in a way that contributes to consumers’ negative hotel reviews.

Literature review

General use of wine

The history of wine can be traced back to antiquity: archeological evidence of grape wine was found in China as far back as 7000 BC, GA (6000 BC), Iran (5000 BC), Greece (4500 BC) and Sicily (4000 BC) (McGovern and Mondavi, 2003). Wine is probably one of the oldest continuously manufactured items in the world and has been a part of human life over the millennia (Unwin, 1996). Studies reveal that people drink wine for a variety of reasons, including experiential consumption (i.e. enjoyment), situational consumption (i.e. food and socialization, relaxation) and symbolic consumption (i.e. status, image) (Charters and Pettigrew, 2008). People are motivated to drink wine because of the enjoyment they derive
from it, the taste of the wine, the effect of the alcohol and the social interaction. Wine has been used widely on special occasions to celebrate or to socialize. Drinking wine creates a sense of pleasure because the alcohol in wine tends to relax people, lower barriers and induce feelings of fun (Charters and Pettigrew, 2008). The sensory pleasure induced by drinking wine can encourage relaxation and help people unwind, thus producing a feeling of well-being. Drinking wine is often regarded as a relaxing and recreational pastime that represents a break from the stresses and strains of working-day life. It is also seen as embodying a certain lifestyle or self-image (Gusfield, 1987). In addition to its hedonic and sentimental aspects, its health benefits are a strong reason for why many people drink wine. Evidence suggests that moderate wine consumption (especially red wine, which is high in resveratrol) may allow people to live longer, protect against certain cancers, improve mental health and boost heart health (Klatsky, 2003; Lippi et al., 2010). Wine has long been served as an accompaniment to food and is consumed in combination with particular foods to make the dining experience more enjoyable (Harrington, 2008). Wine is often purchased for the purpose of gift-giving owing to its symbolism as a luxury item (Somogyi et al., 2011). Historical facts, including some of those mentioned above, testify to the long traditional use of wine as a popular universal beverage.

Current use of wine in hotels
Wine has been widely used in hotels to pair with food or as a token for service recovery. Wine is often used as a gift to create a surprise or delight for hotel guests. Although wine is not a core product in the hotel industry, an increasing number of hotels are using the beverage as a supplementary product/service to augment the guest experience or to distinguish the hotel from its competitors. For example, the Andaz San Diego Hotel launched its “Red Carpet Wine Collection,” featuring an array of celebrity-created wines, such as Barrymore’s Pinot Grigio and Matthews’ The Dreaming Tree, a red blend (Graser, 2013). These celebrity wines were presented in a high-tech wine-dispensing machine, allowing guests to select various amounts of pours at any time and as they wished. Many hotels offer their guests free wine, either in the form of a welcome drink or free wine hours (Yancey et al., 2004). Wine has been used in hotels to develop an emotional bond with customers in novel ways, including teaming up with wineries to start wine clubs or the creation of their own private labels. JW Marriott Hotels and Resorts has introduced the JWM Wine Club by partnering with Treasury Wine Estates in Napa Valley. Each quarter, members can choose two of four wines that will be shipped to them with tasting notes from a JW Marriott wine ambassador, along with recipes from a hotel executive chef (Trejos, 2013). Sheraton’s survey on global wine and travel trends found that travelers tended to drink more during trips than at home and that 66 per cent of guests were more likely to buy wine when a premium wine program was offered (Sheraton, 2015), inspiring hotel operators to pay more attention to the role of wine being a significant revenue stream for hotels. For example, The Ritz-Carlton in Charlotte launched a wine-blending experience in 2017 by letting participants craft their own signature blend (The Ritz Carlton Press, 2017). The Proximity Hotel in Greensboro North Carolina hosted a “Blend Your Own Bordeaux Wine Dinner” in which guests learned how master blenders honed their craft and palates to create a final cuvée (The Proximity Hotel, 2018).

Service quality. The hotel industry is a service industry that relies greatly on the provision of quality service to attract and retain customers. Service quality refers specifically to services that fulfill customers’ desires and wishes and meet or exceed their expectations (Lewis, 1993). Parasuraman et al. (1988) further defined service quality as the customer’s judgment of an entity’s overall excellence or superiority. Customer satisfaction is
created when a perceived service performance meet or exceeds expectations (Mason and Nassivera, 2013; Torres, 2014). The hospitality and tourism literature has documented the positive impact of guest satisfaction on post-purchase behaviors, such as word of mouth (Huang and Chiu, 2006; Rajaguru and Hassanli, 2018), repurchase intention (Brady and Robertson, 2001), customer loyalty (Binninger, 2008) and hotel profitability (Simons et al., 2018). O’Neill and Palmer’s (2003) study suggests that service quality and the satisfaction derived from it are among the most important attributes that enable a firm to gain a competitive advantage over competitors. Thus, a hospitality firm must recognize what factors lead to customers’ favorable assessment of service quality and how to measure service quality to provide and maintain it.

Parasuraman et al. (1985) analyzed more than 200 attributes of service quality, based on a series of interviews with customers in the areas of banking, credit card use, repair and maintenance and telephone services. The authors discovered ten common dimensions that customers used in evaluating service quality (Parasuraman et al., 1988). Later, the ten dimensions were condensed to five and those were incorporated into SERVQUAL, an instrument used to measure the quality of service. The SERVQUAL quality measurement has been the tool most commonly used for the purpose in academia in recent decades (Soutar, 2001). The five dimensions of SERVQUAL are (Parasuraman et al., 1988):

1. **Reliability**: This entails the ability to perform promised service dependably and accurately.
2. **Assurance**: This refers to the knowledge and courtesy of employees and their ability to convey trust and confidence.
3. **Tangibles**: These are the appearance and condition of the physical facilities, equipment, personnel and communication materials.
4. **Empathy**: This refers to the provision of caring, individualized attention to customers.
5. **Responsiveness**: This entails the willingness to help and provide prompt/attentive service.

As a generic measure of service quality, SERVQUAL has been widely adopted by researchers to develop service quality measurement scales tailored to the needs of a specific industry. For example, framed on SERVQUAL and the GAP model (Parasuraman et al., 1985), Frost and Kumar (2000) developed an internal service quality model (INTSERQUAL) to assess the service quality of internal customers in the airline industry. Brady and Cronin’s (2001) service quality model was SERVPERF, which focuses only on customers’ perceptions and consists of three dimensions: interaction quality (attitude, behavior, expertise); physical service environment quality (ambience, design, social factors); and outcome quality (waiting time, tangibles, valence). Huang (2011) empirically tested the application of SERVQUAL and SERVPERF in the context of wineries and suggested that the perception-based SERVPERF approach has a stronger predicative power than SERVQUAL in terms of tourist satisfaction and loyalty.

Studies on the measurement of customers’ wine satisfaction have concentrated mainly on wineries or wine tourism. O’Neill et al. (2002) examined the attributes that contribute to wine-purchasing intention in a winery and found that service process factors contributed more than tangible elements did. Atilgan et al. (2003) found that the attributes of assurance, tangibility, responsiveness and reliability had a positive association with wine tourists’ level of overall satisfaction. Of these attributes, assurance and reliability were highly associated with wine tourist satisfaction (Atilgan et al., 2003). Recently, influenced by the concept of the
experience economy, the experiential dimensions of the consumer consumption process, particularly the utilitarian and hedonic components of this process, have received increasing attention (Sandström et al., 2008). Hospitality and tourism firms can intentionally use services as the stage and goods as props to co-create with their customers a memorable experience and boost customer satisfaction (Akaka et al., 2015; Pine and Gilmore, 1998; Prahalad and Ramaswamy, 2004). Fernandes and Cruz (2016) proposed a holistic model of experience quality, which was validated in the wine tourism industry. This experience quality model can be measured and conceptualized by six dimensions: environment, service providers, learning, entertainment, functional benefits and trust. Thomas et al. (2018) validated a scale to measure wine tourist engagement with the winescape. The seven constructs of the scales are setting, atmospherics, wine quality, wine value, signage, service staff and complimentary products (Thomas et al., 2018). These seven attributes of the winescape are associated with customers’ satisfaction with the winery, which is positively related to the winery visitor’s willingness to both revisit and recommend the winery (Thomas et al., 2018). A study measuring customer wine satisfaction while dining at a restaurant found that a customer’s wine satisfaction was associated with the quality of food, environment and service quality (Choi and Silkes, 2010). A synthesis of previous studies suggests that SERVQUAL’s five dimensions be expanded by adding three constructs: learning, entertainment and complimentary products.

Importance of online reviews
The emergence of Web 2.0 has significantly changed the way firms market their products and services. The advance of social media has empowered consumers to provide public online recommendations or critiques about their experiences with a firm. Social media encompasses a wide range of interactional platforms, including blogs, picture and video sharing, links to websites and applications to engage users in dialog. Media content created or produced by the general public, rather than by paid professionals, and distributed on the internet, is referred to as user-generated content (Daugherty et al., 2008). Posting a personal preference or a positive or negative consumption experience may have a ripple effect on a wider audience. Studies have indicated that e-word of mouth (eWOM) can be more effective than traditional WOM in reaching a larger, more diverse audience; consumers are 16 per cent more likely to be influenced by eWOM than traditional WOM communication (Baber et al., 2016; Goldsmith and Horowitz, 2006). About 35 per cent of travelers changed their travel plans after reviewing user-generated content online (Kim and Dafnis, 2015). Olery’s (2012) study showed that 49 per cent of consumers will not book a hotel without reading consumer reviews first.

Consumers tend to post an online review when they are disappointed with services as an act of retaliation (Sparks and Browning, 2011). Researchers found that negative reviews have more influence on customers’ decisions than positive reviews do (Lee et al., 2008). Wu and colleagues (2016) extended previous studies by addressing the impact of power (one’s ability to influence another person or other people) on customers’ willingness to post online reviews. They found that powerful consumers (those with high ratings or many followers) are more likely to post positive reviews when the forum consensus is negative, while powerless consumers tend to post positive reviews when the forum consensus is also positive (Wu et al., 2016). All these factors reinforce the importance of online reviews in affecting customers’ purchasing behavior. Marketing specialists should not underestimate the power of eWOM and user-generated reviews.
Research method

This study applied content analysis to study wine-relevant online reviews posted on TripAdvisor. Neuendorf (2002, p. 10) defined content analysis as “[…] a summarizing, quantitative analysis of messages that relies on the scientific method.” Krippendorff defined content analysis “as a research technique for making replicable and valid inferences from texts (or other meaningful matter) to the contexts of their use” (Krippendorff, 2013, p. 24). Although content analysis originated in the field of communication, it has been used in multiple disciplines, including political science, anthropology, psychology and management and information studies (White and Marsh, 2006). Overall, studies using content analysis usually involve the following six steps (Krippendorff, 2013; Prasad, 2008; Stempel, 1989):

1. formulation of the research question or objectives;
2. selection of communication content and sample;
3. developing content categories;
4. finalizing units of analysis;
5. preparing a coding schedule, pilot testing and checking inter-coder reliabilities; and
6. analyzing the collected data.

Given the recent increase in prevalence and use of data analysis software applications, text-mining methods have been increasingly used as research tools to extract meaningful keywords from bulk data to answer research inquiries. Text mining provides an efficient method of identifying pairs of words that are frequently adjacent within reviews, but the extent to which the relationship of keywords is meaningful in any given context has been questioned (Feldman et al., 1998; Yu et al., 2011). The pilot test found that counting the frequency that the word “wine” appears in a review can provide only a limited understanding of the application of wine in hotels. For example, one of the reviews contained the keyword “wine,” but a further review of the context showed that the word “wine” was part of the name of a restaurant near the hotel where the reviewer stayed and was not directly related to the wine service provided in the hotel. Therefore, a traditional content analysis conducted manually by coders was adopted for this study.

The New York City hotel reviews posted on TripAdvisor were chosen as the sampling data for analysis. TripAdvisor is a travel website that enables customers to gather travel information and post reviews and opinions of travel services, such as accommodations, attractions and restaurants across the world, and provides a platform to engage visitors in interactive travel forums. It is considered the most successful consumer opinion portal and commercial travel review site in the world (Markham-Bagnera et al., 2015; Viglia et al., 2016). It is also the largest travel community in the world, attracting an average of more than 455 million monthly visitors in seasonal peak periods (TripAdvisor, 2017). Hotel reviews on TripAdvisor are presented based on cities. New York City is one of the top ports of entry in the USA. It is also a top overseas market and has been listed as one of the top big-city destinations in the world. In 2016, it attracted more than 60.5 million visitors, who spent $43bn (NYC and Company, 2017). About 79 per cent of guests in New York City hotels are leisure travelers and 21 per cent are business travelers (NYC and Company, 2017). As of April 12, 2018, 429 hotels were listed on TripAdvisor websites, with a total of 877,616 reviews. New York City hotel reviews containing the keyword “wine” were included for analysis and yielded 26,831 wine-related reviews.

To develop the coding scheme, three reviewers, each holding a PhD degree in hospitality and tourism management, were invited to review wine-related comments from a randomly
selected list of 12 hotels based on hotel stars (three hotels from each rank of stars). The reviewers read each of the selected reviews carefully. Meaningful themes were extracted from the text to form a list of categories. The lists from the three reviewers were compared, and inconsistent categories were resolved through group discussions. A coding sheet was developed after a group consensus was reached. Coding scheme presents the details of the coding scheme.

Coding scheme

(1) Positive reviews
   - good wine quality/tasty;
   - good wine selections/variety;
   - price is reasonable (knew everything was pricy in NYC);
   - free happy hours (free social);
   - paid happy hours (discounted wine);
   - free wine: in room surprise: welcome/ special occasion/celebration surprise;
   - free wine: for service recovery;
   - free wine: offered randomly at the bar;
   - friendly/professional/well-trained bartenders or servers; and
   - chef/sommelier (food and wine pairing).

(2) Prompt service
   - minibar (place to chill wine or pre-filled with wine);
   - in-room kitchen pre-filled with wine;
   - wine opener/glasses/wine bucket in the room;
   - cozy environment to enjoy wine;
   - enjoy rooftop wine drinking with great view of the city/terrace/foyer;
   - enjoy a glass of wine at the end of the day;
   - hotel store carries wine/beer for sale;
   - learn new knowledge about wine; and
   - others.

(3) Negative reviews
   - poor quality of wine;
   - limited wine selection/list;
   - pricy/expensive/overpriced;
   - no free wine: no happy hours; and
   - no free wine offered even though informed the staff regarding the special occasion;
   - pre-arranged or pre-ordered wine/chocolate/cheese plate but not delivered;
   - unfriendly bartender/servers;
   - poorly trained wine-serving staff;
   - slow in serving wine;
serve wine in plastic glasses/paper cups;
- a free bottle of wine did not compensate for the service failure;
- limited wine hours;
- minibar not pre-filled with wine;
- no wine glasses/openers/bucket in the room;
- no mixer to make spritzer;
- in-room kitchen: only a few wines;
- did not like the price tag on the wine bottle;
- unfairness: other people were offered free wine but she/he was not;
- wine becomes disgusting when charged a $32 per day facility charge; and
- others.

(4) Neutral reviews
- mention wine as a part of hotel information;
- mention wine price; and
- others.

During the training session, two coders quantified and tallied the presence of themes from the chosen reviews, based on the coding scheme. Five sample hotel reviews were selected for the coders to practice on. Cohen’s kappa was used to determine inter-rater reliability. The initial inter-rater reliability rate was 0.92, which exceeds the acceptable level of 0.70 (Cohen, 1960, 1968). The two trained coders demonstrated a good reliability rate; therefore, they were asked to conduct the content analysis by following the coding protocol. To ensure the reliability of the analysis, the two coders worked separately. The coders then compared results and discrepancies were discussed until a consensus was reached. The inter-rater reliability rate was 0.87, indicating a satisfactory reliability rate. The results gleaned from the coding scheme were further categorized based on the dimensions identified from previous studies.

Results
By April 12, 2018, 877,616 New York City hotel reviews had been posted on the 429 hotels listed on TripAdvisor. Of these reviews, 26,831 (3 per cent) contained the keyword “wine.” Among these wine-related comments, 290 contained information regarding wine but were irrelevant to the topic of the study and were therefore excluded from the analysis. The majority of the reviews were posted in 4-star hotels (66 per cent), followed by 3-star hotels (17 per cent), 5-star hotels (16 per cent) and 2-star hotels (1 per cent). Wine was mentioned in the online reviews to express positive, negative or neutral hotel experiences. In summary, the top ten most frequently mentioned wine-related comments (both positive and negative) included the following categories:

(1) free happy hours (free social drinking) (13,499 reviews);
(2) free wine; in-room surprise; welcome/special occasion/celebration surprise (12,537 reviews);
(3) pricey/expensive/overpriced (5,028 reviews);
(4) limited wine selection/poor wine list (2,378 reviews);
(5) fun food and wine pairing (1,791 reviews);
(6) free wine (offered randomly at the bar) (1,419 reviews);
a cozy environment to enjoy wine (1,347 reviews);

- good wine quality/tasty wine (1,246 reviews);

- a glass of wine enjoyed at the end of a day/in the evening/after dinner (1,235 reviews); and

- good sophisticated/interesting wine list (1,176 reviews).

In these ten most frequent wine-related categories, the majority (80 per cent) of comments were positive, regarding wine. It was obvious that delight created by complimentary wine offered at the happy hours or for a special occasion motivated positive comments. In addition to good quality wine and a sophisticated wine list, hotel guests appreciated a cozy environment that allowed them to savor the wine. They also enjoyed pairing wine with fun food. On the contrary, overpriced wine and a limited wine list were the top two negative comments.

**Analysis of positive comments**
The ten most frequently mentioned wine-related positive categories were free happy hours (34.3 per cent), a complimentary surprise bottle of wine for a special occasion (31.8 per cent), fun food and wine pairing (4.5 per cent), a random free glass of wine offered at the restaurant or bar (3.6 per cent), a cozy environment to enjoy wine (3.4 per cent), good quality/tasty wine (3.2 per cent), enjoying a glass of wine at the end of the day/after dinner (3.1 per cent), good/sophisticated/interesting wine selection (3.0 per cent), being compensated with a bottle of wine for a service failure (2.6 per cent) and the room being equipped with a minibar to store/chill wine (2.3 per cent). A further analysis of these comments based on the service quality dimensions revealed that the majority of the positive wine-related comments were related to complimentary products (40.4 per cent), followed by empathy (31.8 per cent), tangibles (15.9 per cent), educational/learning experiences (4.6 per cent), hedonic experiences (3.2 per cent), price (1.7 per cent), assurance (1.5 per cent) and responsiveness (0.9 per cent). In terms of complimentary products, reviewers especially liked free happy hours. This is reflected in the following comments: “On Monday through Friday evenings, the hotel serves complimentary wine. The wine was lovely and, more importantly, provided an opportunity to meet and chat.” “There is also complimentary cheese and wine every afternoon between 4 and 6, which is a really nice touch.”

They host daily wine receptions after 5 pm. It was impeccable and relaxing. The wine reception gave us a little break to unwind and sing songs; it was like a hidden retreat from the hectic, rushed New York City life.

The positive comments regarding intangible aspects of the SERVQUAL (i.e. empathy, assurance, responsiveness and reliability) outweighed comments on the tangible aspects, indicating that prompt, accurate, caring, friendly, professional and individualized service delivered during the process of wine consumption escalated guests’ hotel experiences. Examples of these comments were, “We loved chatting to waiters, loved their professional attitude toward service, and their very good knowledge of food and wine! [sic.]” “The staff were very courteous and responded quickly to our request for wine glasses.”

The staff were fantastic from the minute we arrived. They found out it was my birthday and when we returned from a walk, there was a bottle of red wine, two glasses, and a card from the receptionist on the desk.

“[...] added extras, such as a complimentary bottle of Cote du Rhone wine, rounded out a memorable stay.”
In terms of the tangible dimensions, reviewers especially complimented those hotels that offered a good quality and selection of wine and an in-room minibar full of wine. Guests also appreciated hotels that offered a venue with a cozy environment for them to enjoy wine and socialize with their friends. A guest wrote: “Stylish outdoor furniture and modern indoor seating make for a great tranquil place to unwind with a glass of wine after a long day in NYC.” One commented, “I enjoyed a nice quiet glass of wine in the lobby, watching people come and go.” Another guest commented, “The rooftop bar was a real bonus, we really enjoyed sitting with a glass of wine taking in the Manhattan skyline.”

In addition to the five dimensions of SERVQUAL, three additional dimensions emerged from our study: educational/learning, hedonic attribute and price. Approximately 5 per cent of the comments were related to the excitement of learning more about wine or how to pair wine with food. Guests mentioned that they enjoyed the wine they had with their meals. Some wrote that they enjoyed interacting with the chef, sommelier or restaurant manager to learn more. One reviewer remarked “The owner XXX is wonderful and can offer you great advice on choosing a great wine to go with your dinner!”

Regarding the hedonic dimension, guests enjoyed a glass of wine at the end of day. One posted:

Our favorite thing to do after a big day walking through Central Park and doing lots of shopping was to sit in the bar and listen to the beautiful piano – it was a great atmosphere and very attentive service.

Approximately 2 per cent of the comments mentioned that they knew everything was pricey in New York City but believed the price of a glass of wine was reasonable. Table I shows a detailed list of the positive wine experiences based on SERVQUAL and experience quality dimensions.

**Analysis of negative comments**

The ten most frequently mentioned negative wine-related comments were:

- Pricey/expensive/overpriced wine (41.9 per cent), poor wine list (19.8 per cent), poor quality of wine (5.2 per cent), no happy hours/free wine (4.6 per cent), no wine glasses/wine opener/wine bucket in the guests’ room (4.2 per cent), unfriendly/inattentive bartender/server serving wine (2.9 per cent), unhappy with the service failure even after receiving a free bottle of wine as compensation (2.6 per cent), slow in serving wine (2.2 per cent) and unprofessional bartender or wine server (2.1 per cent).

All the negative wine-related comments were categorized based on dimensions identified from previous service quality and experience studies. The most frequently mentioned negative statements were relevant to the expensive price of a glass of wine (41.9 per cent), followed by tangibles (34.1 per cent), intangibles (16 per cent), complimentary products (7.1 per cent) and hidden/additional charges (0.9 per cent). Of all the negative comments related to wine, overpriced wine appeared to be the biggest concern. Examples of comments included: “The prices in the bar/restaurant are outrageous ($22 for Tito’s, $24 for a glass of wine that retails for $7 a bottle).” “We ordered a glass of white wine, vodka and lemonade, with a bottle of water from the bar and they charged me $24 which I thought was a bit steep.” “We paid for the view by having the most expensive glasses of wine ever for us yokels from Maine: $16.00 each.” “The wine was way over-priced. This was a grim and expensive experience.” With regard to the tangible aspect of the negative comments, the majority of negative posts centered on limited/poor wine list, poor quality of wine, no wine glasses/opener/bucket in the room and minibar not pre-filled with wine.
Approximately 34 per cent of the negative comments were related to tangibles such as a limited/poor wine list, poor quality of wine, no wine glasses/opener/bucket in the room and minibar not pre-filled with wine. One reviewer posted, “We were also unable to get a corkscrew or wine glasses in our room (which are things that you cannot bring in your carry-on bag).”

With regard to negative comments on intangible aspects, 16 per cent were related to service employees’ reliability, assurance, empathy and responsiveness. One customer remarked:

Expensive, ordinary, and again the wait staff were inattentive and rather rude, as if we were an inconvenience. My wife wasn’t even asked if she wanted a second glass of wine.

Another wrote: “Service in restaurant was bad, wine not served until after meal was almost entirely eaten.”

Some customers mentioned that they had called the hotel in advance and had tried to pre-arrange or pre-order a bottle of champagne and roses to surprise their spouses or significant others for a special occasion. However, either some hotels did not provide such a service or the order was not delivered to the room in a timely manner. One commented:

### Table I. Summary of positive reviews

<table>
<thead>
<tr>
<th>Categories</th>
<th>Positive comments</th>
<th>Total</th>
<th>(%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Complimentary products</td>
<td>Free happy hours (free social)</td>
<td>13,499</td>
<td>40.4</td>
</tr>
<tr>
<td></td>
<td>Free wine: offered randomly in the bar (no happy hours, not for special celebration, check in)</td>
<td>1,419</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Free wine/wine vouchers: for service recovery/compensate the poor service/guest complaints</td>
<td>1,021</td>
<td></td>
</tr>
<tr>
<td>Empathy</td>
<td>In-room surprise: welcome/ special occasion/celebration surprise</td>
<td>12,537</td>
<td>31.8</td>
</tr>
<tr>
<td>Tangibles</td>
<td>Cozy environment (lobby lounge, restaurant, lobby bar, balcony, pool, in-room bath) to enjoy wine</td>
<td>1,347</td>
<td>15.9</td>
</tr>
<tr>
<td></td>
<td>Good quality of wine/tasty wine</td>
<td>1,246</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Good wine selections/good, sophisticated or interesting wine list</td>
<td>1,176</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Minibar (place to chill wine or pre-filled with wine)/in-room wine storage (fridge space)</td>
<td>914</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Enjoyed rooftop wine drinking with great view of the city/terrace/foyer</td>
<td>889</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Wine opener/glasses/wine bucket in the room/wine cooler/wine bar or rack</td>
<td>336</td>
<td></td>
</tr>
<tr>
<td></td>
<td>In-room kitchen pre-filled with wine (for those luxury suites with a kitchen in the room)</td>
<td>187</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Hotel store carries wine/beer for sale (guests can purchase and drink in their own room-convenient)</td>
<td>174</td>
<td></td>
</tr>
<tr>
<td>Educational/learning experiences</td>
<td>Chef/sommelier/manager(food and wine pairing)</td>
<td>1,791</td>
<td>4.6</td>
</tr>
<tr>
<td></td>
<td>Learn new knowledge about wine</td>
<td>39</td>
<td></td>
</tr>
<tr>
<td>Hedonism</td>
<td>Enjoy a glass of wine at the end of the day/in the evening/after dinner</td>
<td>1,235</td>
<td>3.2</td>
</tr>
<tr>
<td>Price</td>
<td>Price is reasonable (knew everything was pricey in New York City)</td>
<td>460</td>
<td>1.7</td>
</tr>
<tr>
<td></td>
<td>Paid happy hours (discounted wine)</td>
<td>204</td>
<td></td>
</tr>
<tr>
<td>Assurance</td>
<td>Friendly/professional/well-trained bartenders or servers/knowledgeable/attentive</td>
<td>510</td>
<td>1.5</td>
</tr>
<tr>
<td></td>
<td>Helpful arranging wine to be delivered</td>
<td>65</td>
<td>0.9</td>
</tr>
<tr>
<td>Responsiveness</td>
<td>Prompt service in delivering wine to the room or wine glasses/wine openers</td>
<td>358</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Total</td>
<td>39,407</td>
<td>100</td>
</tr>
</tbody>
</table>
I booked this hotel specifically for my girlfriend and I to spend our anniversary in the heart of the city, and the results were disastrous. I gave the management crew a heads-up before my girlfriend arrived about having a nice surprise in our room with flowers and wine. But it seemed as if I was asking too much from the staff. I felt very unwelcome – as if I were a burden to them – which made me feel upset […] If anyone is looking for a special night out on the town DO NOT COME HERE!!!

One customer wrote, “I wouldn’t say anyone went “above and beyond” to make our experience great. They certainly didn’t go out of their way to make us feel welcome […] I made sure to let them know my husband and I were there celebrating our wedding anniversary and thought that perhaps they would have done a nice gesture to help us celebrate (wine in the room, etc.). While nothing was wrong with our stay, I just wouldn’t feel compelled to stay there again.” These examples indicate that hotels may lose guests for failing to perform promised tasks, or for failing to understand the specific needs of their guests.

Approximately 7 per cent of the complaints were about no complimentary product (e.g. no free happy hours, no free wine). About 1 per cent of the negative comments regarded being charged for requesting wine glasses/corkscrew or for storing the wine. It is worth noting that the free wine offered during happy hours also became a scapegoat for additional facility charges. One customer commented, “The free wine and cheese offered at the happy hours in the lobby became so disgusting when I saw the $32 facility charge per day on my hotel bill.” Table II shows the detailed negative wine-related comments by dimensions.

In addition to the positive and negative comments about wine, there were neutral comments regarding wine. Of all the neutral wine-related reviews, 92 per cent included information regarding wine as part of the introduction to the hotel. For example, “This hotel has a restaurant with a wine list.” or “This hotel has a lobby lounge that offers wine.” About 8 per cent of the neutral comments mentioned the price of wines, for example “a glass of wine ranges from $20 to $350.”

**Discussion of results**

Based on the analysis of New York City hotel reviews posted on TripAdvisor by April 12, 2018, this study found that about 3 per cent of the comments were related to wine, indicating wine played a part in guests’ stay at a hotel. In addition to SERVQUAL’s five dimensions, reviews related to complimentary products, educational/learning experience, hedonic attribute, price and hidden/unexpected charges emerged. Complimentary products were the most mentioned positive comments, accounting for 40 per cent. Wine was often used as a gift to create a surprise or delight, thereby enhancing a positive guest experience. More than 31 per cent of the positive comments gave credit to hotels for a free welcoming glass of wine when they checked in, a free bottle of wine and chocolate or fruit in the room to help guests celebrate their honeymoon, birthday or anniversary. Moreover, reviewers especially liked the free happy hours and the opportunity to mingle with other hotel guests. Even though happy hours with wine were mentioned most by customers, it is worth noting that any service failure during the delivery of happy hours could also elicit negative comments from customers. For example, one left a comment, “We liked the free happy hours but the venue was too small, which created overcrowded conditions that spoiled the fun.” Another posted, “The happy hours were fun but the service was poor. I could not even find a staff when I need help.” The same applies to hotel’s use of wine as a token to compensate for service failure. Approximately 3 per cent of the positive comments pertained to the appreciation of the hotel’s intention to make up for customer dissatisfaction. However, it is important to
ensure that the service is performed in an error-free manner or it may lead to more disappointments. One customer wrote:

We were highly disappointed with our stay here. After all the hassle resolving the screwed-up reservation, we were promised that we’d be delivered a free bottle of wine […] that never arrived!

Another customer commented:

The staff sought to make us feel better about the uncomfortable room by leaving us a bottle of wine and two glasses (the gesture might have been more complete if they had also left a corkscrew).

A complimentary bottle of wine is not always regarded as an absolute solution for service failure. One customer who was upset with the service wrote:

### Table II.

<table>
<thead>
<tr>
<th>Categories</th>
<th>Negative reviews</th>
<th>Total</th>
<th>(%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Price</td>
<td>Pricey/expensive/overpriced</td>
<td>5,028</td>
<td>41.9</td>
</tr>
<tr>
<td>Tangibles</td>
<td>Limited/poor wine list</td>
<td>2,378</td>
<td>34.1</td>
</tr>
<tr>
<td></td>
<td>Poor quality of wine</td>
<td>627</td>
<td></td>
</tr>
<tr>
<td></td>
<td>No wine glasses/opener/bucket in the room</td>
<td>501</td>
<td></td>
</tr>
<tr>
<td></td>
<td>No comfortable area to drink wine</td>
<td>141</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Music/atmosphere not good for wine</td>
<td>120</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Minibar not pre-filled with wine</td>
<td>102</td>
<td></td>
</tr>
<tr>
<td></td>
<td>No minibar/no space for wine</td>
<td>101</td>
<td></td>
</tr>
<tr>
<td></td>
<td>No bar/wine bar in hotel</td>
<td>91</td>
<td></td>
</tr>
<tr>
<td></td>
<td>No mixer to make spritzer</td>
<td>13</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Did not like the price tag on the wine bottle</td>
<td>11</td>
<td></td>
</tr>
<tr>
<td></td>
<td>In room kitchen: only a few wines</td>
<td>9</td>
<td></td>
</tr>
<tr>
<td></td>
<td>No hotel store to purchase wine</td>
<td>4</td>
<td></td>
</tr>
<tr>
<td>Complimentary</td>
<td>No free wine: no happy hours/not enough free wine offered</td>
<td>550</td>
<td>7.1</td>
</tr>
<tr>
<td>products</td>
<td>A free bottle of wine did not compensate for service failure</td>
<td>316</td>
<td></td>
</tr>
<tr>
<td>Reliability</td>
<td>Serve wine in plastic glass/paper cups</td>
<td>236</td>
<td>5.3</td>
</tr>
<tr>
<td></td>
<td>Pre-arranged or pre-ordered wine/chocolate/cheese plate but not delivered</td>
<td>221</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Dirty/broken wine glasses</td>
<td>80</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Incorrect wine billings</td>
<td>39</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Unfairness; other people were offered free wine but she/he was not</td>
<td>25</td>
<td></td>
</tr>
<tr>
<td></td>
<td>No wine offered/delivered as promised for service recoverya</td>
<td>17</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Wrong wine order received</td>
<td>15</td>
<td></td>
</tr>
<tr>
<td>Assureance</td>
<td>Unfriendly bartender/servers</td>
<td>346</td>
<td>5.0</td>
</tr>
<tr>
<td></td>
<td>Poorly trained wine-serving staff</td>
<td>249</td>
<td></td>
</tr>
<tr>
<td>Empathy</td>
<td>Limited wine hours</td>
<td>220</td>
<td>3.3</td>
</tr>
<tr>
<td></td>
<td>No free wine offered even though informed the staff regarding the special occasion</td>
<td>164</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Cannot take wine to room</td>
<td>15</td>
<td></td>
</tr>
<tr>
<td>Responsiveness</td>
<td>Slow in serving wine</td>
<td>268</td>
<td>2.4</td>
</tr>
<tr>
<td></td>
<td>Understaffed wine/happy hour</td>
<td>8</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Were unaware of happy hour or wine packagea</td>
<td>14</td>
<td></td>
</tr>
<tr>
<td>Hidden/</td>
<td>Charged for wine glasses/corkscrew/storagea</td>
<td>55</td>
<td>0.9</td>
</tr>
<tr>
<td>unexpected</td>
<td>Wine became disgusting when charged by facility charge</td>
<td>49</td>
<td></td>
</tr>
<tr>
<td>charges</td>
<td>Total</td>
<td>12,013</td>
<td>100</td>
</tr>
</tbody>
</table>

**Note:** a indicates additional categories other than coding scheme
The manager did give us a credit for our lunch and sent us a bottle of wine, which was nice, but not enough for all our troubles and a waste of money by staying at XXX.

This reinforces how the quality of service can influence a customer’s hotel satisfaction and how important it is for service providers to pay close attention to multiple dimensions of service quality.

The results of this study showed that hotel guests wanted to have some wine during their stay at the New York City hotel. Drinking on the rooftop or on a balcony, with great views of New York City, greatly enhanced their hedonic consumption of wine. Slightly more than 3 per cent of the positive comments pertained to the hotel’s provision of a cozy environment (lobby bar, lobby lounge, restaurant, room balcony, pool) that allowed them to enjoy a glass of wine and the availability of a minibar to chill wine, wine glasses, a wine opener and a wine bucket in the guestroom. A number of reviewers also liked the fact that some hotel stores offered wine for sale so guests could purchase a bottle and drink it in their own room. On the contrary, missing these tangible aspects during their hotel stay gave customers the opportunity to post negative reviews. Approximately 14 per cent of the negative comments were dedicated to factors such as no wine glasses, wine opener, wine bucket or minibar in the room, the lack of a bar or wine in the hotel or lounge and no comfortable area to drink wine. All these reviews confirmed that wine had become a significant part of guests’ lodging experience.

Following this trend, it is not surprising that comments related to the quality of wine and price were included in guests’ hotel reviews. About 3 per cent of the positive comments regarded the good quality of wine offered in the hotel; another 3 per cent were compliments to the hotel for the good selection of wines or their sophisticated wine list; and approximately 2 per cent of the positive reviews were related to friendly/professional/well-trained bartenders or wine servers encountered by the guests. On the other hand, approximately 42 per cent of the negative comments were geared toward expensive and overpriced wine. Almost 13 per cent of the negative comments were regarding the poor quality of wine and the limited wine list. For example, one reviewer stated:

Drinks are overpriced–typical for NY, but worst is they were BAD!! I was tired and didn’t want to walk somewhere, so I thought it would be hard to mess up a glass of wine. Even though we were hotel guests, they could not accommodate us–so we wound up at a local Irish bar instead.

The quality of service delivery is always one of the top attributes customers comment on in online reviews (Tontini et al., 2017), and this study was no exception. “I pre-ordered a bottle of wine and strawberries and they were delivered exactly as I asked!” Negative comments regarding service related mainly to reliability and assurance. Examples of the comments were, “The service was generally very bad; we would call for a wine bottle opener and they never brought it. When we went to the front desk to ask, they said they would charge us for it [...]” “Repeated calls for short cocktail glasses resulted first in wine glasses, then martini glasses, then tall, skinny iced-tea glasses.”

The most unforgivable and bizarre error was removing our wine glasses when there was still half a bottle of wine remaining. The practice of keeping your wine bottle out of sight and away from the table is one I find unnecessary and very irritating.

“They tried to charge us for things we didn’t consume, such as a $40 bottle of wine (I highly recommend you check the bill before the checkout).” The findings are in line with SERVQUAL’s reliability, responsiveness, assurance and empathy dimensions, reinforcing the importance of providing prompt, accurate and individualized service, as well as performing promised service dependably, even in the context of serving wine.
Conclusions
Although the data for this study were gathered from TripAdvisor’s New York City hotel review platform, customers did talk specifically about “wine” in their hotel reviews. People consume wine primarily for hedonic purposes (Neeley et al., 2010), and this study showed that guest experiences with wine while staying in a hotel can contribute to either positive or negative online reviews. Wine is a tangible product that can be served in a way that creates a memorable moment that brings pleasure and excitement to a hotel stay, thus, motivating guests to visit again.

This study revealed that many guests like to have some wine during their stay at a hotel and are in favor of a bar on the hotel premises or a liquor store nearby. To cater to guests who enjoy drinking wine in their room, hotels need to equip rooms with a minibar, wine glasses, bottle openers and space to store wine. Hotels can use positive wine-related reviews to develop a good wine strategy to meet or exceed guest expectations. Strategies can include improving some of the tangible aspects of wine, such as the quality of wine and the wine list, and creating a cozy, relaxing, welcoming servicescape in which guests can enjoy a glass of wine. Hotels can develop social events by offering free wine or discounted wine to engage guests and develop loyalty. They can organize wine workshops to satisfy customers’ needs of learning. Most of all, hotels need to train their bartenders or wine servers to be knowledgeable and professional in serving wine. This study clearly indicated that professional wine-serving skills and customer-service skills are important.

It is human nature that people love to get something at no charge and with no strings attached. Thus, it is not surprising that offering free wine at the hotel during happy hours was the most mentioned wine-related comment. Hosting a free happy hour at the hotel may be perceived as an added-value offering; however, staying in a hotel without a happy hour definitely upset many guests. Although the upfront costs for giving away free wine can be substantial, the number of positive reviews regarding free happy hours and the number of negative reviews complaining of no free happy hours may justify this as a necessary investment.

Customers’ poor experiences with wine at a hotel can sully the hotel’s reputation and discourage the customer from returning to the hotel. This study found that customers care about the pricing of wine. Hotels can seek partnerships with wine stores or wineries to feature specific wines or to offer competitive wine prices. Hotels should also consider selling bottled wines with a variety of prices for guests to choose and, thereby, generate additional revenue from wine sales. To attract more guests and add value to bookings, hotels could offer packages in which wine is an important ingredient. To extend wine hours without increasing the staffing budget, hotels could consider adopting a wine dispenser in the lobby or on each floor as an added-value convenience for guests to have a glass of wine whenever they want.

In summary, the findings support the provision of wine as a supplementary product that can add to or detract from the experience of hotel guests and that has an impact on guests’ WOM or repurchase behaviors. Hotel guests tended to make wine-related comments based on multiple dimensions, including tangible (e.g. quality of wine, variety of wine selection, environment), intangible (e.g. assurance, empathy, reliability, responsiveness), complimentary products (free drinks), learning (knowledge about wine or wine and food pairing), prices, hedonic attribute and hidden/additional charges. As such, the wine experience dimensions identified in this study can serve as factors for hotels to monitor and evaluate the quality of the wine provision at their facilities. Hotel operators need to consider these dimensions when providing wine and/or a wine experience at their facilities. Hotels
can take advantage of the popularity of wine to improve the hotel-stay experience for their guests and to attract prospective guests.

**Limitations and future studies**

While this study delineated the role of wine in hotels by examining online reviews posted by customers and provided practical implications for hotels to improve their online reputation, marketing position and sales, it has several limitations. First, the sampling frame was limited to hotel reviews in New York City posted on the TripAdvisor website. Thus, some of the categories identified may be location-specific; for example, the much-mentioned rooftop bar may be popular simply because of New York City’s extraordinary skyline. More than 78 per cent of hotel guests visited New York City for leisure purposes. This segment of travelers may have different expectations of wine from those of travelers in other segments. Future studies can expand the location to different cities to increase the scope of the sampling frame. Second, new reviews posted on TripAdvisor may be added at any time. The findings of this study are based on available New York City hotel reviews as of April 12, 2018. Third, this study used two trained coders to conduct the content analysis. It is hard to avoid human error in coding data because of fatigue, personal bias and perception. Although the inter-rater reliability exceeded the minimum standard of 0.70, it is not perfectly reliable. To eliminate the concern of human error in conducting content analysis, future studies could apply sophisticated computer software for data coding to achieve higher reliability. Fourth, content analysis helps to classify what is there but may not reveal the underlying motives for the observed pattern. For example, the reviews showed that guests enjoyed drinking in their own rooms. Limited by the content analysis, the researchers were not able to interpret the reasons. Future studies could use the information gleaned from this study to develop a survey and collect qualitative data from hotel guests and further explore their wine preferences or behaviors when staying in a hotel. Future studies could also investigate hotel guests’ wine behaviors based on the types of hotels and benchmark the hotel guests’ wine-drinking profile based on their travel purpose.

**References**


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Customer-centric offer design

Meeting expectations for a wine bar and shop and the relevance of hybrid offering components

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Abstract

Purpose – The purpose of this study is to provide insight into characteristics of visitor demand for a regionally oriented vinotheque (wine bar and shop) at a UNESCO world heritage destination in Germany. The research especially focuses on expected offer components for a wine bar and shop, including wine-related products and services, to test the theoretical notion of blurred division between product and service offerings. The literature review has revealed that implications of this conceptual notion on wine bar and shop offer creation could be profound as there are different types of wine bar and shops with different product–service combinations. Moreover, the offer creation needs to take into account the overall needs of wine bar and shop visitors and consider them as experience seekers and not necessarily utility-maximizing players. In this sense, the paper expands previous research on vinotheques that primarily took the wine retail perspective.

Design/methodology/approach – The study deals with wine-related sales, offer design and the importance of tourism and hospitality for wine sales in a non-growing wine market. However, the concept of increasing wine sales through tourism and hospitality brings to the forefront the issues of creating integrated offerings of products and services. This is why, the study deploys the concepts of hybrid products and experience economy. The primary data have been collected via self-administered, paper-based questionnaire (Appendix 2) amongst visitors at the St. Goar/Loreley tourist destination. The goal has been to reveal the importance of a wine bar and shop as a wine sales channel, whether visitors are interested in visiting a wine bar and shop, what major expectations they have entering a vinotheque, as well as what major offer components of products and/or services are they interested in. Total sample size was N = 400. Major statistical procedure deployed was descriptive statistics, as well as PCA (principal component analysis) of expectations and offer analysis in regards to products and services.

Findings – By deploying the PCA on the data regarding interest in buying wine-related products and services, three offer configurations have been extracted, out of which only one is purely related to products, whilst the other two are hybrid products, meaning a combination of wine-related products and services. Relevance of architectural design illustrates that visitors also seek experience. These findings confirm previously discussed theories on the importance of integrating products and services into hybrid products and creating experience with a suitable combination of products and services.

Research limitations/implications – Data collection has taken place in a confined timeframe (two summer months). No active measures have been taken to ensure the validity of the sample through quotas or similar techniques. The research sample and location are somewhat limited for making conclusions in other geographical regions, but replicating the study in different contexts can add to the comparability of the results on the level of Germany, but also internationally. The empirical evidence for superior customer value of hybrid offerings and integrating services into product-centric offer design is of paramount importance for selling wine in a highly competitive market in absence of market growth. Wine bar and shop allows to differentiate the offer by creating wine-related experience through a combination of product (wine and wine-
related products), hospitality/gastronomic services and tourism services. The insights also illustrate the idea of new market opportunities via connecting converging industries.

**Practical implications** – The study contributes to close a gap identified in the literature review that German wineries lag wine-tourism activities. It provides advice in regards to offer design and hybrid offerings and an experiential experience supported by architectural design. Such an approach offers the potential to win market share in a non-growing market – an ambition of the players in the market but also an obvious challenge.

**Social implications** – The findings contribute to regional development. Furthermore, arguments for cooperative behavior are provided. This should also help to minimize free ridership and its negative social implications.

**Originality/value** – The paper adopts a multidisciplinary approach to the creation of wine bar and shop offer. The results point out that offerings should be created around a core wine tourism product – regional and cellar door offer – and be expanded by “food design” – components, attractive architectural elements, as well as web shop services, thereby creating an advanced wine-related experience. It confirms the importance of theoretical concepts such as experience economy, hybrid products and solution provision in the case of wine bar and shop, by testing these concepts on the group of visitors at a German wine and cultural destination.

**Keywords** Principal component analysis, Strategy, Survey research, Hospitality and wine, Hybrid offering, Offer design

**Paper type** Research paper

**Introduction**

This study explores offer design for a regional vinotheque (wine bar and shop) in a tourist destination in the Mittelrhein region of Germany, a distinguished UNESCO world cultural heritage, famous for the rock of Loreley. It, therefore, deals with synergetic offer design of the wine and the tourist industry, identifying expectations of destination visitors regarding a wine bar and shop. Another important topic is visitor interest in wine shop and bar as a wine sales channel compared to other wine sales channels and the level of interest in wine-related supplementary products and services at a wine bar and shop. The main idea behind this research is that wine-centered experience should be at the core of wine bar and shop operations. In this sense, the “bar” part (hospitality services), the “shop” part (selling wine and wine-related products), as well as the tourism-related services allow attractive offer design for new unconquered needs. Unique product/service offerings, so-called hybrid offerings, should be created, combining the three important areas of operations. To do this, first, a phenomenon of wine bar and shop in the German market needs to be delineated.

Dreyer et al. (2017) postulate that there is no unified definition of vinotheke among experts in the German-speaking world as to what kind of services it does or does not provide. The authors provide the four important functions:

1. wine sales and tasting;
2. product experience through a wine bar;
3. bistro or tasting zone as a communication center for experiencing the wine world; and
4. tourist facility.

Indeed, lexical definition consists of:
- a collection of precious wines;
- a wine cellar with a bar; and
- wine shop (Duden, 2018).
In the English language, Merriam-Webster and Oxford dictionary have no records of vinotheque/vinothek, enothek/enotheque or oenotheque/oenothek (Merriam-Webster, 2018; Oxford, 2018). The Oxford dictionary of wine defines enoteca as a term used frequently in Italy for a wine shop that also often offers tasting facilities and food to accompany wine – ranging from an appetizer to a high-level cuisine (Robinson, 2015). In conclusion, in the following a vinothek, enothek and a wine bar and shop are used synonymously because all include a presentation of wine collection, tasting, selling and at times food offer, while their setting, ownership type as well as final offer mix can vary from place to place.

Creative offer design to access new market opportunities is key to escape competitive markets, a hot topic in business literature (Kim and Mauborgne, 2014). This is especially relevant because the German wine market is currently stable with intensive rivalry and a market drive out (DWI, 2018). In lack of dynamic growth and increasing competition, suppliers need to engage to keep their customers and eventually, win market share. Channel extension offers potential to win new clients (Dressler, 2016). Additionally, tourism represents a viable market strategy to grow in the competitive wine sales market (Dreyer et al., 2011; Faugère et al., 2013; Orth, 2011). However, wine tourism requires an extension of services provided and should be based on a strategic approach (Dressler, 2017b). Although the potential is identified and wineries in Germany increasingly open wine bars and create offers to attract tourists, common approaches are lagging compared to international practice (Koch et al., 2013b). Having in mind the relatively small size of an average German winery – 2.36 ha in 2015 (BMELV, 2016; DWI, 2017b), there is a significant potential regarding joint wine bars that can create synergetic value for the region as point of attraction. It can also serve as a sales channel or outlet for the participating wineries considering the obvious need for suppliers to consider multi-channel offerings (Dressler, 2016).

The goal of the presented study was to research wine sales channels of visitors at a German wine and cultural destination, generate additional information on market potential for wine bar and shop, as well as to prove the theoretical notion of hybrid products, a promising concept for creating a wine bar and shop offer design. For this to be achieved, a set of four research questions has been created:

**RQ1.** How important is wine bar and shop as a wine sales channel compared to other channels?

**RQ2.** Are visitors at the St. Goar/Loreley interested in visiting a wine bar and shop?

**RQ3.** What are major expectations from a wine bar and shop of visitors at the St. Goar/Loreley?

**RQ4.** What major groups of products and/or hospitality and tourism services in the wine bar and shop are of interest to visitors at the St. Goar/Loreley?

The paper is organized in the following way: the literature review section deals with the background literature on wine sales, wine tourism, wine and hospitality, selling by providing experience and offering solutions instead of pure products. The methodology section explains the process of primary data collection, the sample characteristics, as well as the statistical analysis methods deployed and limitations of the study. The results section presents the results through descriptive statistics and the PCA (principal component analysis). The conclusions and recommendations section discusses further the results in the context of the scientific implications for theory and practice.
Literature review

A vinotheque or a wine bar and shop finds itself at the intersection of wine sales, tourism and hospitality. From a commercial perspective, a wine bar and shop should generate additional wine sales, but more importantly, it should extend the wine offerings by including various merchandise and contribute to hospitality and tourism services to create a memorable buying experience. This is important because, at destinations like the Rhine Valley, creation of unique wine tourism experience includes offering a wide range of activities: from cultural heritage and education, to hospitality, gastronomy, festivals and winery tours (Charters and Ali-Knight, 2002; Getz, 2000).

In the contemporary German wine tourism market, wine tastings, guided cellar tours and visits to vineyards are the most potent drivers of wine sales (Koch et al., 2013a). However, wine tourism not only provides wineries with additional sales channel but also promotes the territory of the wine region as a whole (Bruwer et al., 2013; Wargenau and Che, 2006), thus contributing to brandings efforts. In this sense, wine tourism core offering is traditionally based on regional and cellar door perspective, coupled with socialization and wine education, but more recently includes also additional offerings related to food, nature, literature and spa treatments (Hall et al., 2000; Koch et al., 2013a; Sekulic et al., 2016). Poitras and Donald (2006) have researched the wine destination of Oliver, Canada, to identify three types of possible improvements in the mature stages of wine tourism destinations:

1. improvements of the core product (the wine industry);
2. improvements of the hospitality infrastructure; and
3. improvements of the wine tourism experience, through packaging, interpretation and accessibility.

In this sense, improvement of wine tourism should not only rely on wine industry but also on hospitality infrastructure and wine tourism packaging, interpretation and accessibility – both not being a subject of wider destination coordination and investment. Architectural design to foster attractiveness of destinations but also to underline brand and reputation come into play (Göbel, 2012a; Kolesch, 2007, 2009; Nohl, 2001; Schätzel, 2011).

Regarding hospitality at a wine destination, strong hospitality offerings are usually an indicator that a critical group of established and usually large wineries are present at the destination, due to the commitment of resources needed in this field of operations (Telfer, 2001). Large wineries in the German market (companies above 20 ha that make up around 6 per cent of the total number of wine companies (DWI, 2017b)) are interested in developing modern wine tourism as a phenomenon that is much more than a visit to winery and/or vineyard to buy wine. It entails a wide offering of wine products, expanded winery experiences, as well as hospitality and tourism features in a regional context to form a greater winescape (Byrd et al., 2016). In this sense, hospitality is one of the eight supplementary services to be part of the augmented services model that should facilitate the use of wine product itself, enhance the perceived value of wine to consumers and consequently, support higher wine prices, as well as generate additional streams of revenue (Byrd et al., 2016; Lovelock, 1992).

Wine sales can benefit from expanding distribution channels through wine bars and wine stores, but also from creating interactive wine experiences through special events in tastings in show rooms and sales facilities (Dressler, 2013; Göbel, 2012b; Kinder and Slavova, 2009). The reason for this is that contemporary food consumption goes beyond its functional
character to include rich symbolic and nonmaterial characteristics under the post-Fordist paradigm (Meroni, 2002). In this sense, producers can only be successful by embracing a “food design” paradigm shift, where choreographic and experiential elements in agritourism and in cellars, restaurants and wine bars are being considered. (Nosi and Zanni, 2004b). Apparently, Germany is a laggard to the successful regional value creation in wine tourism, often because of a lack of needed joint efforts and strategic orientation to exploit touristic opportunities (Dressler, 2017a; Koch et al., 2013a).

Any research on wine consumption and the role of wine bar and shop would not be complete without the consideration of the experiential component. Tasting room visitors make wine-buying decisions primarily based on service satisfaction, and not on wine quality (O’Neill et al., 2002). Also, an orchestrated experience is the second most important factor for a wine bar and shop after wine tasting and sales, while it also has an especially strong influence on post-purchase attitudes of millenial customers (Dreyer et al., 2017; Nowak et al., 2006). Experience economy is based on the psychological insights that consumers are not necessarily rational utility-maximizing players, as the classic economic theory suggests (Bruhn and Handwich, 2012; Carù and Cova, 2003; Kumar, 2004; Pine and James, 1998). They often tend to pursue a hedonic multisensory experience instead of solely utilitarian consumption (Addis and Holbrook, 2001). It has been demonstrated, for example, that consumer views on the likelihood of being left without an experiential component of a service shows higher levels of anxiety that can lead to refusing the purchase altogether (Altschwager and Habel, 2011; Chang, 2018). This happens because consumers have higher expectations for the future experiences compared to the past ones and tend to overestimate their future outcomes (Wilson et al., 2000). As a response, there is a decreasing importance of “dogmatic” divide between creation of products and services and an increasing accent on the creation of experience value (Ahler and Evanschitzky, 2003; Niepel, 2005). It is important at this point to notice that any experience offering actually consists of product and/service or a combination of the two (Gustafsson and Johnson, 2003). This is why, hybrid offerings are important: the goal is to offer different combinations of products and services or to differentiate the product through additional services (Gray et al., 2004) by moving freely on the goods-to-services continuum according to the market needs to create a suitable offer (Golicic, 2013; Gustafsson and Johnson, 2003; Scheer, 2003). Often, technology nurtures a solution perspective with high integration of product and services (Khan, 2009).

Integrated offerings of products and services can also be seen from the perspective of selling the whole solution (Johansson et al., 2003). Selling the solution means that it is primarily experience and provision of the solution that count, whether one sells products or services is less important (Niepel, 2005). However, Spath and Demuß (2003) postulate that, in many industries, product development comes first, as a core business, while development of a service, supplementary to the product, comes second. The first step in this situation is usually to do an integrated specification collection/market research and analysis of both development processes: for products and for services. In this sense, the creation of such an integrated offer demands a whole range of competencies and capabilities (Opitz and Stanik, 2003). In a pursuit for needed competencies and capabilities, companies often engage in cooperation, where task-oriented systems for solving customer’s problems are being created in a way that competencies and capacities of partners complement each other (Belz, 2002).

Methodology
The primary data had been obtained via a self-administered, paper-based questionnaire on a total sample of $N = 400$ visitors, thereof $N = 34$ considered themselves as locals visiting the St.
Goar/Loreley destination. The questionnaire noted origin, gender, age, household members and occupation. In regards to touristic value and preferences, the questionnaire assessed visitation frequency to St. Goar/Loreley and behavior of visitors regarding wine bar and shop. Here, the preferred channel for buying/acquiring wine, already visited hospitality/catering businesses at the destination, intentions of visiting a wine bar and shop and expectations in regards to a wine bar and shop, interest in buying different supplementary products/services at a wine bar and shop built the core of the questionnaire. The data have been collected in June and July 2017. The total sample size for the demographic data, visitation frequency and intention of visiting wine bar and shop was $N = 400$. However, for the different questions regarding wine bar, the sample size was $N = 300$ (for one interview, questions on supplementary products/services were left unanswered), as only those interested in visiting a wine bar continued with this section of the questionnaire. For the preferred channel for buying/acquiring wine, the sample size was $N = 363$, as only the population that stated wine consumption was proceeded further in this section. The data have been processed with an IBM SPSS Statistics 19.

Visitor’s demographic data, visitation frequency and behavior regarding wine bar and shop have been presented through descriptive statistics. Additionally, PCA has been run for visitor’s expectations in a wine bar and shop ($KMO = 0.455$), as well as their interests in buying wine-related supplementary products/services at a wine bar and shop ($KMO = 0.611$). The PCA of visitors’ expectations has been excluded from further analysis because the KMO value (0.455) was below the 0.6 threshold, whereas interest in wine-related supplementary products/services analysis with a KMO value (0.611) was above the threshold value.

The data collection has taken place in a rather confined timeframe (two summer months), where off-season months are not taken into account. No active measures have been taken to ensure the validity of the sample through quotas or similar techniques, although demographics show no noticeable distortion in this sense. The distinction of touristic or local visitor bases on the stated origin of the interviewee. Although sample size was deemed sufficient for conducting factorial analysis, larger sample size would contribute to the validity and stability of the results. Replicating the study in different wine destinations can add to the comparability of the results on the level of Germany, but also internationally.

Results

The results section is divided into three sections:

(1) section with descriptive statistics of visitors’ demographics and visitation frequency to St. Goar/Loreley (origin, gender, age, occupation, visitation frequency to St. Goar/Loreley);

(2) section that deals with descriptive statistics of visitors’ behavior regarding wine bar and shop (preferred channel for acquiring/buying wine, already visited hospitality/catering business at the destination, intention of visiting a wine bar and shop, expectations from a wine bar and shop); and

(3) section showing the results of PCA of visitors’ interests in buying supplementary wine-related products/services at a wine bar and shop, where three major composite components have been extracted.

Descriptive statistics of demographic data and visitation frequency to St. Goar/Loreley are presented in Table I. The majority of the contacted visitors come from Germany (86.5 per cent), the rest coming from abroad. Female and male visitors were present in a relatively balanced proportion. The older-aged population from 49 to 62 years and from 63 to 95 years...
jointly dominate the sample, while there is also a significant numbers of youngest population from 17 to 37 years (25 per cent) and middle-aged population from 38 to 48 years (18 per cent). The majority of the visitors live either with a partner (43 per cent) or in a family (42 per cent), while there is a relatively low number of persons living single (15 per cent). Most of visitors are workers (48 per cent), but a significant proportion of the interviewees work as independent entrepreneurs (19 per cent), pensioners (16 per cent) or public officers (9 per cent). College-level students, stay-home partners, interns, persons looking for a job and primary or secondary school students jointly make up for about 10 per cent of the interviewed population. Regarding the visitation frequency, most of the interviewed travel first time in the region (43 per cent), visit multiple times a year (20 per cent) or once a year (12 per cent). Still, a number of visitors visit every two to four years (11 per cent) or live in the wider region (9 per cent). Visitors with less than once in five years was under 10 per cent.

Descriptive statistics of visitors’ behavior regarding wine bar and shop are presented in Table II. One column informs about the results of the multiple answers as percentage of total cases presented, while the right column presents the results by visitors. The most preferred

<table>
<thead>
<tr>
<th>Year</th>
<th>Percentage</th>
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<tr>
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<td>22.8</td>
</tr>
<tr>
<td>2021</td>
<td>25</td>
</tr>
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<td>1.8</td>
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<tr>
<td>2026</td>
<td>1.5</td>
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<tr>
<td>2027</td>
<td>1</td>
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<tr>
<td>2028</td>
<td>1</td>
</tr>
</tbody>
</table>

Table II. Descriptive statistics of visitor’s behavior regarding wine bar and shop to St. Goar/Loreley (N = 400)
wine-buying channels are wineries (24 per cent), food retailer (24 per cent), discounter (17 per cent) and specialized wine store (16 per cent). Following, less important wine sales channels include online store (9 per cent), wine bars (6 per cent), wine fairs (4 per cent). Previously visited hospitality/catering businesses at the destination include restaurant (56 per cent), wine bar (19 per cent), wineries (13 per cent), none of the abovementioned (11 per cent) and cafés (2 per cent). The majority of visitors would visit a wine bar and shop given the right signage, where one part has responded to the question with yes (41 per cent), another part responded with maybe (34 per cent) and others responded with no (25 per cent). Regarding expectations, PCA has initially also been conducted but with no significant results, as the KMO value was below the 0.6 threshold and has been, therefore, rejected. Instead, descriptive statistics have been used. Major expectations from a wine bar are tasting (21 per cent), wine sales (19 per cent), professional staff (12 per cent) and food offer (9 per cent). Other expectations are appealing architecture, web shop, wines from the Middle-Rhine region only, possibility of shipping orders directly to home address, possibility to meet the vintners and accessibility. The opportunity to buy both regional and international wines is of least interest.

PCA was deployed to identify and compute composite scores for the interest of visitors in wine-related products and services at a wine shop and bar and to determine what combinations of supplementary products and/or service visitors are interested in to explore hybrid offerings. Only respondents who answered yes in the initial question of whether they would visit a wine bar and shop have continued with the part of the questionnaire related to wine bar and shop.

<table>
<thead>
<tr>
<th>Table II. Descriptive statistics of visitors’ behavior regarding wine bar and shop</th>
</tr>
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<tbody>
<tr>
<td><strong>Multiple answers</strong></td>
</tr>
<tr>
<td><strong>Preferred channel for buying/acquiring wine</strong></td>
</tr>
<tr>
<td>Vineyard</td>
</tr>
<tr>
<td>Food retailer</td>
</tr>
<tr>
<td>Discounter</td>
</tr>
<tr>
<td>Specialized wine store</td>
</tr>
<tr>
<td>Online store</td>
</tr>
<tr>
<td>Wine bar</td>
</tr>
<tr>
<td>Wine fair</td>
</tr>
<tr>
<td>Getting it as a present</td>
</tr>
<tr>
<td>Cooperative winery</td>
</tr>
<tr>
<td>Wholesale</td>
</tr>
<tr>
<td>Intention of visiting a wine bar and shop</td>
</tr>
<tr>
<td>Yes</td>
</tr>
<tr>
<td>Maybe</td>
</tr>
<tr>
<td>No</td>
</tr>
<tr>
<td><strong>Expectations from a wine bar and shop</strong></td>
</tr>
<tr>
<td>Tasting</td>
</tr>
<tr>
<td>Wine sales</td>
</tr>
<tr>
<td>Professional staff</td>
</tr>
<tr>
<td>Food offer</td>
</tr>
<tr>
<td>Appealing architecture</td>
</tr>
<tr>
<td>Web shop</td>
</tr>
<tr>
<td>Wines from the Middle-Rein region only</td>
</tr>
<tr>
<td>Possibility of shipping orders to home address</td>
</tr>
<tr>
<td>Possibility to meet the vintners</td>
</tr>
<tr>
<td>Accessibility</td>
</tr>
<tr>
<td>Wines of both regional and international origin</td>
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</tbody>
</table>
The level of interest in 12 wine-related supplementary products/services at a wine bar and shop (Table III) has first been examined for factorability. The KMO measure of sampling adequacy was 0.611, slightly above the recommended value of 0.6. Bartlett’s test of sphericity has been deployed: the approximate of chi-square was 135.381 with 66 degrees of freedom and the result was significant at the 0.05 level of significance. Extraction values, presented in the Table IV, were not particularly high, which means that only a relatively small proportion of variables’ variance can be explained by principal components.

Initial eigenvalues indicated that the first three factors were 1.798, 1.272 and 1.198 and explained 15 per cent, 11 per cent and 10 per cent of variance. Factors 4 and 5 had eigenvalues just over 1 and together explained additional 18 per cent of variance. The three factor solution, which explained 36 per cent of variance, has been selected based on following:

- the “elbow” principle – the right number of factors is the one appearing before the “elbow” on the components and eigenvalues plot (Figure 1);
- the previous theoretical support for differentiating between wine-related supplementary products and services; and
- problems with interpreting larger number of factors.

<table>
<thead>
<tr>
<th>Variable</th>
<th>N</th>
<th>Mean</th>
<th>SD</th>
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</thead>
<tbody>
<tr>
<td>Thematic wine tasting</td>
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<td>3.72</td>
<td>1.373</td>
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<td>Wine tasting and review</td>
<td>299</td>
<td>3.56</td>
<td>1.465</td>
</tr>
<tr>
<td>Taking a cellar tour</td>
<td>299</td>
<td>3.54</td>
<td>1.464</td>
</tr>
<tr>
<td>Regional products</td>
<td>299</td>
<td>3.46</td>
<td>1.529</td>
</tr>
<tr>
<td>Paying a visit to a vineyard</td>
<td>299</td>
<td>3.27</td>
<td>1.592</td>
</tr>
<tr>
<td>Taking part in a wine and cultural event</td>
<td>299</td>
<td>3.23</td>
<td>1.634</td>
</tr>
<tr>
<td>Taking a wine seminar</td>
<td>299</td>
<td>2.85</td>
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</tr>
<tr>
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<td>1.610</td>
</tr>
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<td>1.802</td>
</tr>
<tr>
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<tr>
<td>Professional literature</td>
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<td>1.752</td>
</tr>
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</table>

Table III. Descriptive statistics: interest in buying different supplementary products/services at a wine bar and shop

<table>
<thead>
<tr>
<th>Interested in buying/booking</th>
<th>Initial</th>
<th>Extraction</th>
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<tr>
<td>Brandies/spirits</td>
<td>1</td>
<td>0.413</td>
</tr>
<tr>
<td>Wine glasses</td>
<td>1</td>
<td>0.306</td>
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<td>0.172</td>
</tr>
<tr>
<td>Professional literature</td>
<td>1</td>
<td>0.529</td>
</tr>
<tr>
<td>Regional products</td>
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<td>0.352</td>
</tr>
<tr>
<td>Wine jelly and/or marmalade</td>
<td>1</td>
<td>0.387</td>
</tr>
<tr>
<td>Wine tasting and review</td>
<td>1</td>
<td>0.374</td>
</tr>
<tr>
<td>Thematic wine tasting</td>
<td>1</td>
<td>0.274</td>
</tr>
<tr>
<td>Visit to a vineyard</td>
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<td>0.435</td>
</tr>
<tr>
<td>Cellar tour</td>
<td>1</td>
<td>0.361</td>
</tr>
<tr>
<td>Wine seminar</td>
<td>1</td>
<td>0.322</td>
</tr>
<tr>
<td>Wine and cultural event</td>
<td>1</td>
<td>0.343</td>
</tr>
</tbody>
</table>

Note: Extraction method: PCA

Table IV. Results of PCA
This approach only explains 36 per cent of variance. Therefore, a solution with three factors has been further analyzed using varimax rotations of the factor loading matrix.

The varimax rotation with Kaiser normalization has been deployed. The results have been sorted as the coefficients in rotated component matrix (Table V) by size and for simplicity and readability reasons. Items that loaded below 0.3 have been excluded from the table.

Component plot in rotated space (Figure 2) depicts the results from the rotated component matrix graphically and demonstrates that there is a clear grouping of wine-related supplementary products. Component 1 contains professional literature 0.723, wine jelly and/or marmalade 0.57, wine glasses 0.516 and wine accessories 0.405. The second most important component is Component 2, and it is a hybrid category, where interest in a specific non-wine beverage product (brandies/spirits 0.513) is grouped with two

<table>
<thead>
<tr>
<th>Interested in buying/booking</th>
<th>Component 1</th>
<th>Component 2</th>
<th>Component 3</th>
</tr>
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<tbody>
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<td>0.57</td>
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</tr>
<tr>
<td>Wine glasses</td>
<td>0.516</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Wine accessories</td>
<td>0.405</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Visit to a vineyard</td>
<td></td>
<td>0.643</td>
<td></td>
</tr>
<tr>
<td>Wine tasting and review</td>
<td></td>
<td>0.560</td>
<td></td>
</tr>
<tr>
<td>Brandies/spirits</td>
<td></td>
<td>0.513</td>
<td></td>
</tr>
<tr>
<td>Thematic wine tasting</td>
<td></td>
<td>0.488</td>
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<tr>
<td>Regional products</td>
<td></td>
<td></td>
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<td>Wine and cultural event</td>
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<td></td>
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<td>Wine seminar</td>
<td></td>
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<td>0.520</td>
</tr>
<tr>
<td>Cellar tour from a wine bar</td>
<td></td>
<td></td>
<td>0.490</td>
</tr>
</tbody>
</table>

Table V.
Rotated component matrix

Notes: Extraction method: PCA. Rotation method: varimax with Kaiser normalization. Rotation converged in five iterations
predominantly hospitality services (wine tasting and review 0.560 and thematic wine tasting 0.488) and one tourist service (visit to a vineyard 0.643). The third most important component is Component 3, where interest for a specific group of products (regional products 0.582) is grouped with three predominantly tourist services (wine and cultural events 0.568, wine seminar 0.520, cellar tour from a wine bar 0.490).

The only correlation in the correlation matrix (Appendix 1) that proved proved to be above the widely considered minimum correlation of 0.2 and statistically significant at the 0.05 level is the correlation ($\rho = 0.229$) between professional literature and wine jelly/marmalade. It is not entirely clear why these two items are correlated and whether these two products can be, for example, marketed and sold as a complementary pair. Further research is needed to confirm and further explicate these results for practical application.

Discussion
The major finding of the PCA was that it confirmed previous findings of Hall et al. (2000) that at the core of wine tourism are regional and cellar door offer, as this offerings were part of Component 3 and have been the third and fourth most important interest in a wine bar and shop. More importantly, this finding confirms that the wine tourism literature can also be translated to hospitality literature, and put a focus in the future wine hospitality research on types of cellar door experiences and regional products offerings in a hospitality context. In addition, hospitality research should further investigate the role of the hybrid packaged offerings (different wine-related supplementary products and services) to include both tourist offerings (visit to a vineyard), hospitality offering (wine tasting, thematic wine tasting) and offerings of other beverages (e.g. brandies/spirits).

The overall wine sales channels in Germany are dominated (in order of significance) by supermarkets (food retailers), supermarkets, discounters and wine stores, while winery direct sales are at the least important sales channel (DWI, 2017a; Szolnoki and Hoffmann, 2014). Szolnoky and Hoffmann point to a rather large group of multichannel customers in the German market who make up 23 per cent of the market. However, this research demonstrates that in the case of visitors to a cultural/wine destination with the preferred sales channels of winery direct sale, or food retailer (each channel about 24 per cent) and specialized wine store (16 per cent) speak for less price sensitivity, as well as a higher interest in experience shopping (Dressler, 2015). Even though wine sales are placed as a second most important expected function of a wine bar and shop (19 per cent), the respondents stated that specialized wine shop (15 per cent of respondents) represented only their fourth most favored sales
channel, and wine bar (6 per cent of respondents) is rather a niche sales channel. In this sense, only vineyard direct sales has this direct connection with visitors, while wine stores and wine bars are a rather small wine sales channel. On the other hand, findings of Rüdiger et al. (2015) demonstrate the importance of independent wine bar and shop (not tied to only one wine producer) as an information source for wine tourists about the destination and its overall tourist offer. This puts an accent on wine bar and shop more as an information and education center, and less as a potent, high-quantity wine sales channel.

Regarding food offer (9 per cent) as the fourth most important expectation from a wine bar confirm previous results in the field of food production. It has been pointed out that wine and food producers need to switch to a “food design” paradigm, which means they should consider choreographic and experiential elements in hospitality businesses, e.g. wine bars (Nosi and Zanni, 2004a). The finding in Table II that customers expect an appealing architecture – a fairly important expectation from the wine bar and shop, especially considering that 24 per cent out of the total number of cases stated such an expectation and being part of a multiple answer question supports significance. Indeed, it was fifth most important factor out of 10 factors. This finding is consistent with literature on architectural developments and its important role in regional development (Gonzalez, 2006). There are also examples in Aix-en-Provence, where some wineries organize art and architecture walks, where visitors can explore both their architecture and their wines (Murphy, 2017). Regarding architectural development, a wine bar and shop faces two often conflicting options:

1. attract an often internationally renowned architect, because “good architecture is not enough anymore: to seduce we need names” (Areso, 2001); or
2. further development of regional architectural traditions through the use of regional craft techniques and building materials (Bundesamt für Bau-, S.-u.R, 2015; Stoeckl and Caseau, 2017).

In this sense, new construction projects can significantly contribute to competitiveness not only of the wine industry but of the wider destination (Innerhofer, 2010; Ratz and Dreyer, 2013). There are, however, also some critical opinions regarding the cooperation between architecture and other industries. That cooperation is sometimes limited because of conflicting agendas and interests and according coordination costs (Ooi and Strandgaard, 2017).

Conclusions and recommendations
Wine bar and shop (vinotheque) is more than a wine shop, as it provides hospitality services, but less than a restaurant because only selected foods are offered to accompany wine tasting. It also provides more information on wines it sells than a restaurant. The very concept of a wine bar and shop with its hospitality and tourism aspects is a very suitable format for addressing major deficiencies that German vintners need to overcome (Koch et al., 2013a): limited knowledge of wine tourism, lack of skills for increasing wine sales through brand loyalty and marketing and poor cooperation between tourism organization and vineyards. In this sense, the wine bar and shop should serve as a starting point for collaboration between wineries, wine experts, wine-themed crafts, arts, regional catering/food industry and entertainment and bringing different competencies and capabilities together to create suitable wine-related experiences. The analyzed expectations from a wine bar and shop confirm that the major expectation of visitors at Loreley is tasting, followed by wine sales, professional staff and food offer alongside appealing architecture and web shop integration. Apparently, there is no need for a full wine assortment as special wine retailers offer. These results demonstrate that visitors at a wine and cultural destination welcome experiential buying and hybrid offerings. While experts in the German-speaking world note
a missing coherent definition of the wine bar and shop (Dreyer et al., 2017), visitors at a wine and cultural destination seem to know what the wine bar and shop is all about. Eventually, the flexible nature of wine bar and shop offers, identified by Dreyer et al. (2017) (regional wine bar and shop that only serves and sells wines in comparison to the ones that integrate the tourist offer) render them a popular choice for expanding the wine hospitality offer.

Having in mind that wine tastings and guided cellar tours are the most powerful boosters of wine sales in the German market, followed by visits to vineyards (Koch et al., 2013a), identified offer design on Component 2 (visit to a vineyard, wine tasting and review, brandies/spirits and thematic wine tasting) is most attractive to increase the wine sales. An offer solution based on Component 3 (regional products, wine and cultural event, wine seminar, cellar tour from a wine bar) follows closely. The least potential for increasing the wine sales is with Component 1 design (professional literature, wine jelly and/or marmalade, wine glasses, wine accessories), but this component has the function of enhancing the overall experience. Hence, the highest potential for increasing wine sales lies within the two hybrid product components. Such offer design follows the idea to provide solutions combining products and services, and thereby offers the potential to tap new markets with less competition than in the pure product-centric wine industry.

Wine bar and shop needs to concentrate on hybrid offerings of wine-related products and services to create a memorable experience. It should position itself on the market based on its strengths and consciously emphasize distinctiveness from regular wine-sales channels by creating a targeted offers encompassing:

- enriching wine services (wine seminar, wine and cultural events/festivals, cellar tour);
- supplementary wine products (professional wine literature, wine jelly/marmalade, wine glasses and wine accessories); and
- hybrid offer components, targeting visitors’ needs that include both wine-related products and services in creating memorable wine experience (e.g. by integrating a visit to a vineyard, wine tasting and selling brandies/spirits or by integrating regional products with wine and cultural events, wine seminars and cellar tours).

Important to note is that the offer creation should start with the identification of the resources available, as hybrid offer creation depends on multiple competencies and capabilities compared to creating only product or service offerings (Opitz and Stanik, 2003).

References


Niepel, P.R. (2005), Management Von Kundentrustungen, HSG, St. Gallen, p. 388.


### Appendix 1

#### Correlation, values with correlations > 0.2

<table>
<thead>
<tr>
<th></th>
<th>Brandies and spirit</th>
<th>Wine glasses</th>
<th>Wine accessories</th>
<th>Prof. literature</th>
<th>Region. prod.</th>
<th>Wine jelly and/or marmalade</th>
<th>Wine tasting and review</th>
<th>Thematic wine tasting</th>
<th>Vineyard visit</th>
<th>Cellar tour</th>
<th>Wine seminar</th>
<th>Wine and cultural events</th>
</tr>
</thead>
<tbody>
<tr>
<td>Brandies and spirit</td>
<td>1</td>
<td>0.096</td>
<td>0.105</td>
<td>0.066</td>
<td>-0.059</td>
<td>0.14</td>
<td>0.146</td>
<td>0.14</td>
<td>0.087</td>
<td>-0.012</td>
<td>-0.03</td>
<td>0.022</td>
</tr>
<tr>
<td>Wine glasses</td>
<td>0.096</td>
<td>1</td>
<td>0.066</td>
<td>0.182</td>
<td>0.139</td>
<td>1.039</td>
<td>0.131</td>
<td>1.089</td>
<td>0.051</td>
<td>0.051</td>
<td>0.106</td>
<td>-0.024</td>
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<td>0.052</td>
<td>0.052</td>
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</tr>
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<td>0.139</td>
<td>0.05</td>
<td>0.229</td>
<td>-0.019</td>
<td>1</td>
<td>0.07</td>
<td>0.182</td>
<td>0.043</td>
<td>0.021</td>
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<td>0.075</td>
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<td>-0.014</td>
<td>0.106</td>
<td>1</td>
<td>0.121</td>
</tr>
<tr>
<td>Wine and cultural events</td>
<td>0.022</td>
<td>-0.024</td>
<td>0.102</td>
<td>0.028</td>
<td>0.136</td>
<td>0.041</td>
<td>0.123</td>
<td>0.099</td>
<td>0.009</td>
<td>0.088</td>
<td>0.121</td>
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</tbody>
</table>

**Sig. (one-tailed), values < 0.05 marked with gray**

<table>
<thead>
<tr>
<th></th>
<th>Brandies and spirit</th>
<th>Wine glasses</th>
<th>Wine accessories</th>
<th>Prof. literature</th>
<th>Region. prod.</th>
<th>Wine jelly and/or marmalade</th>
<th>Wine tasting and review</th>
<th>Thematic wine tasting</th>
<th>Vineyard visit</th>
<th>Cellar tour</th>
<th>Wine seminar</th>
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<td>0.008</td>
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<td>0.114</td>
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<td>0.012</td>
<td>0.185</td>
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<td>0.078</td>
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<td>0.014</td>
</tr>
<tr>
<td>Thematic wine tasting</td>
<td>0.008</td>
<td>0.063</td>
<td>0.479</td>
<td>0.126</td>
<td>0.061</td>
<td>0.001</td>
<td>0.078</td>
<td>0.091</td>
<td>0.086</td>
<td>0.098</td>
<td>0.017</td>
<td>0.014</td>
</tr>
<tr>
<td>Vineyard visit</td>
<td>0.006</td>
<td>0.189</td>
<td>0.307</td>
<td>0.388</td>
<td>0.414</td>
<td>0.232</td>
<td>0.001</td>
<td>0.067</td>
<td>0.139</td>
<td>0.408</td>
<td>0.438</td>
<td>0.065</td>
</tr>
<tr>
<td>Cellar tour</td>
<td>0.421</td>
<td>0.192</td>
<td>0.292</td>
<td>0.232</td>
<td>0.079</td>
<td>0.36</td>
<td>0.086</td>
<td>0.055</td>
<td>0.139</td>
<td>0.408</td>
<td>0.438</td>
<td>0.065</td>
</tr>
<tr>
<td>Wine seminar</td>
<td>0.3</td>
<td>0.033</td>
<td>0.38</td>
<td>0.093</td>
<td>0.184</td>
<td>0.159</td>
<td>0.098</td>
<td>0.324</td>
<td>0.408</td>
<td>0.034</td>
<td>0.018</td>
<td>0.017</td>
</tr>
<tr>
<td>Wine and cult. events</td>
<td>0.352</td>
<td>0.34</td>
<td>0.04</td>
<td>0.312</td>
<td>0.069</td>
<td>0.239</td>
<td>0.017</td>
<td>0.043</td>
<td>0.438</td>
<td>0.065</td>
<td>0.018</td>
<td>0.017</td>
</tr>
</tbody>
</table>

**Table AI.** Correlation matrix (determinant = 0.63; KMO = 0.611; sig. A = 0.001)
Appendix 2. Questionnaire (without demographic questions)

1.-5. Origin, gender, age, household members’ occupation

   - It is my first time here.
   - Less than once in 5 years.
   - Every 2 to 4 years.
   - Once a year.
   - Multiple times a year.
   - I live here.

7. Where do you buy your wine? Multiple choice, multiple answer.
   - Directly from vintners at the wine production site.
   - Specialized store.
   - Food retailer (REWE, EDEKA).
   - Online shop.
   - Discounters (Aldi, Lidl).
   - Wine fair.
   - Wine shop and bar.
   - Other (please name which channel).

8. Given suitable signage, would you visit a wine shop and bar at the St. Goar/Loreley? Multiple choice.
   - Yes.
   - Yes, if (please name).
   - Maybe.
   - No.

9. What do you expect from a wine shop and bar at the Loreley? Multiple choice, multiple answer.
   - Tasting opportunities.
   - Wine sales.
   - Appealing architecture.
   - Web shop.
   - Accessibility.
   - Professional advice.
   - Getting to know vintners.
   - Shipping to my home address.
   - Selected offer of foods.
   - Wine offer exclusively from the Middle Rein.
   - Wine offer from different region/countries.

10. How much are you interested in obtaining following wine related products in a wine bar and shop? Please grade on a scale from 1 to 6 (1-not interesting at all to 6-very interesting).
    - Brandy/spirit.
    - Glasses.
    - Wine accessories.
    - Professional publications.
    - Regional products.
    - Wine jelly/marmalade.
11. How much would you be interested in the following wine related offerings in a wine bar and shop? Please grade on a scale from 1 to 6 (1-not interesting at all to 6-very interesting).

- Guided wine tasting.
- Thematic wine tasting (for example wine and cheese, wine and music, wine and chocolate).
- Vineyard sightseeing by foot.
- Wine cellar tour to a close by winery.
- Wine seminar.
- Wine events and cultural events, for example with music.

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