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## The Winemaker As Entrepreneurial Marketer: An Exploratory Study

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# The winemaker as entrepreneurial marketer: an exploratory study

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**Keywords** New Mexico, Participant observation, Opportunity, Risk, Emerging wine region, Entrepreneurial marketing, In-depth interviews, Qualitative research, Winemakers

**Paper type** Research paper

## Introduction

The USA is the fourth largest wine producing nation in the world (Stevenson, 2005), with California accounting for 89 per cent of annual volume (Alcohol and Tobacco Tax and Trade Bureau [ATTTB] Report, 2011). Each of the 50 states and the District of Columbia is home to at least one winery (Gilinsky *et al.*, 2010; Shaw and Bahney, 2003). The majority of these wine regions are fragmented with more individual and family-owned businesses than corporate wineries. Due to scarcity of extant knowledge of winemakers' life-worlds in developing and smaller wine regions in the USA (Dodd, 1995; Edwards, 1989; Spawton, 1989), wine business researchers have called for further studies on smaller wineries to understand the producers' side of the business

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(Beverland, 2000; Mora, 2006; Richardson, 2004). In wine research, despite multitude studies on consumers' perspectives, there is a marked lack of knowledge of the winemakers' viewpoint. Given that small wineries are prolific in the USA (ATTTB Report, 2011), this research contributes to extant knowledge by investigating ways in which small-scale winemakers sustain livelihoods. Scholars have outlined the need for small wineries to account for sustainable marketing strategies for survival in the long run (Beverland, 2000; Mora, 2006), yet little is known about how winemakers achieve (or fail) in this regard. To answer this call, this study investigates New Mexico (NM), an emerging wine region with challenging conditions where the winemaker is compelled to take bold action to simultaneously support production and create value for their customers.

NM, with 43 wineries and tasting rooms (New Mexico Wine Growers Association, 2014), accounts for just 0.068 per cent of annual US wine production (ATTTB Report, 2011). Often such small wine regions are tied to the local tourism industry with "wine-trails" marketed as cultural attractions (Alonso, 2011; Bruwer and Alant, 2009; Richardson, 2004; Wargenau and Che, 2006). Although, NM boasts the oldest winemaking history in the country – conquistadors, traveling along the Camino Real (The Royal Road), reportedly brought wine to NM in 1598, and some speculate that monks at Senecu brewed wine as early as 1629 (Street, 2001), there is limited efforts to promote wine tourism. It is therefore, contingent on the small group of independent winemakers' to build the reputation of this small industry.

NM's northern terrain is mountainous and rocky with dry and cold temperatures. The growing season is short, leaving northern NM winemakers with little choice but to purchase grapes from central or southern NM to supplement inadequate local harvests. Central NM, in contrast, is arid though temperate with longer growing season relative to the north. Southern NM is also arid but suffers from severe winds in spring. The entire state, due to its desert location, is also subject to extreme temperature fluctuations where average daytime temperatures of 50-70F can plummet to freezing at night on a daily basis during winter. Although beneficial for the grapes, such fluctuations tend to damage vines over time. Different growing seasons across the state also pose problems in acquiring and fermenting operations. There are often other scale-related challenges in blending, bottling, labeling and marketing activities (Taplin, 2010). Thus, our first research question investigates: how do members of the NM wine industry undertake business practices with limited resources of a small-scale wine region?

The traditional understanding of the winemaker is an expert at making wine, who plan, supervise and coordinate selection of grapes and production of wines (World Food Wine, 2014). A winemaker researches new wine, helps coordinate testing of grapes, sets filtered wine in caskets and provides technical information to help wine mature. While this describes the winemaking process, it overlooks winemaking as a business. Winemaking as a livelihood is complicated and difficult, requiring diverse skills learned over several grape-growing and wine-blending seasons (Gilinsky *et al.*, 2010). The wine industry is exceptional in the sense that primary (grape cultivation) and secondary (winemaking) productions and the marketing and selling of the finished good (wine) are often under the purview of one business entity (Maguire, 2010; Somogyi *et al.*, 2010). In this study, we aim to further our understanding of the winemaker's responsibilities in a small winery context. Thus, our second research question investigates: How does the individual NM winemaker conduct day-to-day operations in running a winery?

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### *Conceptual background*

Because this is an exploratory study, emergent themes from data analysis led to situating the findings within existing knowledge in accordance with the theoretical framing technique suggested by Spiggle (1998) and Pandit (1996). We explored life-worlds of six NM winemakers and found that their individual and collective business practices and philosophies were best examined through the lens of entrepreneurial marketing (hereby EM). EM as a field of research emerged in 1980s as scholars began to question assumptions that entrepreneurs applied traditional marketing methods (mass media, marketing mix and quantitative marketing research) typically adopted by firms that possess requisite resources (finances and expert knowledge) to execute such activities (Gruber, 2004; Morris *et al.*, 2002). Initial enquiries sought to understand whether conventional marketing principles were applied in uncertain entrepreneurial environments (Collinson and Shaw, 2001; Gruber, 2004; Kraus *et al.*, 2012). Initial conceptualization often deemed EM to be reactive, unsophisticated and limited to individual whims (Hultman, 1999; Kraus *et al.*, 2012; Lodish *et al.*, 2001; Morris *et al.*, 2002). For example, Morris *et al.* (2002, p. 4) described EM practices as “unplanned, non-linear and visionary actions of the entrepreneur”. Nonetheless, it was evident that the confluence between entrepreneurship and marketing resulted in business activities that were distinct from normative paradigm (Berthon *et al.*, 2006; Kraus *et al.*, 2012).

While Morris *et al.* (2002, p. 5) conceptualized EM as “proactive identification and exploitation of opportunities for acquiring and retaining profitable customers through innovative approaches to risk management, resource leveraging and value-creation,” newer definitions have been posited in the literature (Hills and Hultman, 2013; Kraus *et al.*, 2010). For example, Kraus *et al.* (2010) in their review of past definitions of EM, furthered a more encompassing version by combining definitions of entrepreneurship and the current American Marketing Association’s definition of marketing (p. 27):

Entrepreneurial marketing is an organizational function and a set of processes for creating, communicating, and delivering value to customers and for managing customer relationships in ways that benefit the organization and its stakeholders, and that is characterized by innovativeness, risk-taking, proactiveness, and may be performed without resources currently controlled.

We recognize both definitions as consistent to the core concept of EM and in this article focus on the dimensions underlying both definitions. These dimensions are briefly defined next.

Proactiveness is defined as anticipating and acting on future needs by seeking new opportunities, including anticipating new offerings ahead of competition, and minimizing or eliminating operations that are in maturing or declining stages (Venkatraman, 1989). This dimension is considered leading rather than reacting (Morris *et al.*, 2002) where a firm’s proactiveness supports its ability to anticipate market shifts and changes in consumer needs (Lumpkin and Dess, 2001). Proactiveness supports innovation, the EM dimension that reflects a firm’s tendency to engage in novelty and create new products (Lumpkin and Dess, 1996). Morris *et al.* (2002) describe it as having a “healthy dissatisfaction” with the status quo and a healthy engagement with consumers to predict future preferences and demands. Risk-taking stems from understanding that resources are finite and involves the capacity of a firm to handle ambiguity and random variance (Wiklund and Shepherd, 2003). Opportunity focus derives from a firm’s capacity to pursue opportunity

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regardless of current available resources (Morris *et al.*, 2002, Morris *et al.*, 2013). Opportunities are market imperfections, locations in consumer perceptual desires that remain unfulfilled. Resource leveraging refers to “doing more with less”, i.e. maximizing limited resources for optimum benefit (Morris *et al.*, 2002). Entrepreneurial firms effectively leverage and exploit resources they control to create distinctive competencies (Miles and Darroch, 2006). Where firms are limited in resources to achieve market opportunities, they will likely barter, outsource and negotiate with other firms to succeed. In this way, they can lower risk, increase their own intellectual capital and acquire additional resources (Miles and Darroch, 2006; Kraus *et al.*, 2012). Value creation is a key component of entrepreneurship (Stevenson *et al.*, 1989) and implies adding value in every way possible in a marketing strategy as well as providing value to the customer or adding value to the consumer offering (Morris *et al.*, 2002).

Several studies have explored different combinations of EM dimensions. Although fragmented, they have collectively established the EM paradigm (Collinson and Shaw, 2001; Gruber, 2004; Jones and Rowley, 2011; Kraus *et al.*, 2012; Miles and Darroch, 2005; Mort *et al.*, 2012; Stokes, 2000). However, Ionita (2012) described the EM construct as “under-developed” and lacking a unifying theory given the complexities involved in understanding how these dimensions are undertaken in real-world scenarios, which are typically inconsistent and messy. More research has been called for to better understand the inter-relationships between the core constructs (e.g. opportunity driven, proactiveness, innovation-focused, customer intensity, risk management, resource leveraging and value creation) of EM (Kraus *et al.*, 2012; Morris *et al.*, 2002). Fiore *et al.* (2013) recently developed an EM scale and tested it for convergent, discriminant and nomological validity. These recent developments indicate that EM is a multi-dimensional construct (Fiore *et al.*, 2013). Currently, there are limited studies on EM efforts of winemakers. However, some scholars have recently explored entrepreneurial behavior in winemaking as a mark of start-up performance (Griffin and Coulthard, 2005), industry growth (Mattiacci *et al.*, 2006; Charters and Menival, 2008; Taplin and Breckenridge, 2008) and return on investment (Gilinsky *et al.*, 2010). Our study contributes to this growing research area on developing the knowledge of EM practices of winemakers. We find that EM dimensions are fluid and dynamic and not exclusive of one another.

## **Research method**

Six winemakers located throughout NM with various backgrounds in terms of previous experience, heritage, winemaking knowledge, length of time in the business and overall business skills were recruited through purposive sampling (Lincoln and Guba, 1985). As the NM wine region is relatively small, to protect the identities of our participants, we offer a general description and use pseudonyms. Although modest, our sample offers a diverse group of people traversing the length and breadth of the state. Four wineries are located in central (one winery) and northern (three wineries) part of the state where weather and soil quality challenges are dissimilar. Similarly, the southern part of the state where we interviewed two winemakers face water and weather challenges unique to the region (e.g. windy season). Two of the winemakers had been in business between 15 and 20 years, and four wineries were within 5-9 years of start-up at the time of data collection. Between them, participants produce from a handful blends to over 70 blends per year. Some wineries operate under one label; others have over five labels.

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Informed consent was obtained from each participant. Ethnographic research methods including participant observation and in-depth interviews were used. Active listening and probing techniques were used when revealing topics were brought up in the interviews (Spradley, 1979). Each winemaker was interviewed during two separate occasions (see select interview questions below). The first interview comprised broad, open-ended questions eliciting stories of the winemakers' business-related experiences in harvesting, procuring grapes, blending processes, marketing and selling activities from an industry perspective. The second rounds of interviews were mostly undertaken on site, which allowed one author to conduct participant observation at the wineries, tasting rooms and vineyards. Insights were gained into how winemakers' individual belief systems influenced their business outlook and everyday decision-making activities. These follow-up interviews were also used to clarify questions from the first interview. During these visits, the author engaged in informal interviews with family members and employees, sampled wine, toured vineyards and winemaking operations to become further sensitized to the life-worlds of winemakers during the data collection stage. Interviews lasted between 1 to 2 hours and were digitally recorded and transcribed.

Select interview questions are as follows:

- (1) *First Interview:* The business aspects of winemaking
  - How did you get started in the wine industry? If you hadn't pursued a profession in the wine industry, what would you have done instead?
  - Describe your typical day. (In the spring/during planting, summer/growing season, fall/harvest)
  - How did you name your vineyard/winery?
  - How did you decide on the wine label and logo? What does it mean to you?
  - What do you think about when you create wine? What are the most important factors in making a good bottle of wine?
  - If you buy grapes from other vineyards – what do you consider when deciding what to buy and where to buy it?
  - How do events in the vineyard translate into the taste of the wine? For instance, the weather?
  - How do you decide what wines to blend?
  - What do you do when there's a bad harvest?
  - How many years did it take to build your winery? What are some challenges you have had to overcome? What successes have you enjoyed?
  - What changes have you seen in the wine industry? Where do you (ideally) picture yourself in 10 years? 20 years?
- (2) *Second Interview:* The individual aspects of winemaking
  - Why does wine appeal to you?
  - Why does wine matter?
  - What are your earliest memories of/experiences with wine?
  - How did you learn to taste wine?

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- How did you come to New Mexico?
  - What makes your wine unique?
  - What makes your vineyard unique?
  - Tell me about your most memorable vintage.
  - Tell me about a special or vivid wine memory.
  - What are your favorite food and wine pairings?
  - What is your winemaking philosophy?
  - Is there a standard of good taste with wine?
  - Tell me a wine narrative – the story behind a particular bottle or vintage?
  - What happened the year those grapes were grown – the weather, the history that might have affected it?
  - What does it mean to you to be a New Mexico winemaker and see New Mexico on the label?

The narratives developed in an organic manner by refraining from specific inquiries. For instance, there was no specific mention of “entrepreneurial marketing”, “entrepreneurism” or “marketing” during the interviews. The multiple interviews generated rich descriptions and elicited untainted narratives from which elements of EM were later revealed during data analysis. The authors independently analyzed and coded the data through iterative readings. Independent codes were then compared and contrasted through multiple interactive sessions (Charmaz, 2000). The authors also discussed secondary data during these sessions, allowing for triangulating evidence until emergent themes crystallized. As mentioned earlier, the authors referred to extant EM literature and scrutinized its dimensions to further strengthen theoretical contributions (Spiggle, 1998; Pandit, 1996). The findings are outlined in the next section. Due to space limitations, additional illustrative quotes are presented in Table I.

#### *Findings and discussion*

Data analysis revealed the adventurous spirit of the winemakers, which is presented through select quotes and integrative text analysis (see Mick and Buhl, 1992). The narratives exposed personal values embedded in winemaking business practices, from which we identified four themes, namely, “spirit of the pioneer”, “survival of the fittest”, “customers know best (or do they?)” and “resource leveraging through networking”. The emergent themes highlight aspects of EM dimensions in participants’ experiences as NM winemakers. Our findings also indicate that elements of risk are pervasive across all dimensions of EM and does not work well if categorized as a separate dimension, as posited by Morris *et al.* (2002).

#### *Spirit of the pioneer: pursuing opportunities*

For participants, winemaking as a livelihood typically began with acquisition of land for growing grapes. NM winemakers came from backgrounds that varied from engineering to farming. Some yielded to the desire to break away from family business and start their own winemaking venture. One wanted a comfortable lifestyle after retiring from salaried employment, and another spoke of waning physical capabilities, making it difficult to continue with farming, opting for more creative winemaking. The desire to be

Spirit of the pioneer: pursuing opportunities	Survival of the fittest: proactiveness and innovation	Customers know best (or do they?): value-creation via customer participation	Resource leveraging through networking: balancing competition and collaboration
<p>I bought this land in 19xx and in 19xx we had the land leveled. I was trying to figure out what to do with it. I knew they were growing grapes in this valley and had been for a long time. I didn't know the varieties or anything about it and the truth is I had mentioned to my wife that maybe we ought to try to grow grapes. And she was literally looking at a book from UNM on their continuing education classes and said, "Look here. Here's a class in wine growing." I actually took the class and that's how we got started. It's unbelievable, but that's exactly what happened. (Fred)</p>	<p>On the business part, the Internet has opened up a lot of doors for all of us. Now I can compete with large wineries on the Internet. People can Google and find us. I don't have to have a million dollar advertising budget to get somebody who lives out in the corner of Colorado or someplace. So that's been fun. And I think in the wine-making part of it, the growth of some of the large labs and stuff in California, where we send wines to get analyzed. They're more and more able to help the small wineries analyze wine and know what's going on, good and bad, in the wine. (Bob)</p>	<p>I like to be in direct contact with the customer. Sometimes they can tell you nice things about the wines, in fact, they complain too. If they don't like it the way that you make it, you try to improve all the time (Edgar)</p>	<p>I've met lots of wine-makers and I've been to lots of wineries. And the ones that I like are the ones where the wine-makers and the staff are having fun and the place is lighthearted. And they're willing to take time to talk to you. I wouldn't be where I am today if other wine-makers hadn't taken time to talk to me and explain different winemaking processes. And I think the whole industry is generally very consumer friendly with friendly competition. Especially in New Mexico, but even in California to a certain extent, you can talk to the wine-maker and ask specific questions and find out answers that will help make your wine better. And we still sell all we make. And most New Mexico wineries do. We figured the better the wine, the more we sell, the more everybody benefits from it. (Bob)</p>

(continued)

**Table I.**  
Additional quotes supporting EM themes from findings



Table I.

Spirit of the pioneer: pursuing opportunities	Survival of the fittest: proactiveness and innovation	Customers know best (or do they?); value-creation via customer participation	Resource leveraging through networking: balancing competition and collaboration
<p>It's tough to present our wines to a wide market because we're just a boutique winery and we don't have the people to get huge and I don't want problems with people. Five or six people are enough [...] It's not necessarily the wine business, but it's our location, our lifestyle shows big potential that we could develop to help us survive because everything blends so well with the tasting room and wine business. We're talking about doing a bed and they are always asking, "Do you have a place to stay?" (Albert)</p>	<p>You've got to be proud of what you're making. The wine that you make has to be well made that you're proud of [...] Do it the right way. Immediately we bought all stainless steel containers. No fermentation on plastic, period. We don't want any plastic flavors getting in the wine. All French oak barrels. No substitutions. No Hungarian oak. The French oak [is] kind of purest in that way—it just tastes slightly better. It has a burnt finish that adds a subtle flavor; it's not an overpowering oak flavor. We really try to make the highest quality product we can. (David)</p>	<p>They couldn't care less if the wine was a blend, if the grapes were grown on the said winery or if it was artificially corrected through chemicals [...] what was important to them was that it was palatable and that they got a nice afternoon buzz from it [...] (Albert)</p> <p>Because wine has such complexity in its character, taste preferences differ from person to person. You're making wine for a person from Texas who comes over here, gets up in the morning and drinks Coca-Cola for breakfast, but also for a guy who drives over here from California who's used to North Coast Cabernet Sauvignon and asks for Cab Sav, who's got his nose in the air. And you're making wine for multiple others as well. It's just a total different audience. (Fred)</p>	<p>We're relatively new and the older places that have been doing business with places that sell grapes, they get the first choice. (Albert)</p>

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independent, to be the master of one's destiny was a common element across narratives. This trait aligns with the opportunity-driven dimension of EM, where the individual possesses innovative insights of identifying or creating previously unexplored opportunities (Morris *et al.*, 2002, 2013). Here, the notion of risk-taking as opposed to risk-minimizing is evident. In true pioneering spirit, pursuing opportunities involved risk-taking – of jumping into the unknown irrespective of the outcome:

And we often drove by xxxx Winery. But we'd never been to a winery. One Sunday we were together and decided to stop at the winery. We had a little bit of time. But the second I drove into xxxx's yard I said, "Look at this – this guy is growing grapes. He's a farmer. He's processing his product. He's making his wine and he sells it at his own bar. Nobody's involved except him. This is really neat" (Albert).

Albert, upon visiting a winery in northern NM, found the lifestyle alluring enough to attempt without knowing anything about winemaking. He purchased land and started to grow grapes. His enthusiasm and zeal was evident as he solely relied on the confidence garnered from his farming experiences to take on grape cultivation. The prospect of being in charge of his own fate and eliminating the middle-man appealed to Albert. Similarly, Fred acquired land he thought would be good for growing grapes and relied on imprecise understanding that others were growing grapes in the region. He was confident in his capability to learn a new trade. He believed in education and looked for opportunities in local higher education institutions to learn more about grape cultivation and wine production (see Table I).

We're different, we're unique. Our wine doesn't taste like California, thank god! They taste different. Everything in New Mexico is grown above 4,500 feet, and that's nosebleed for California. It's all grown in alkaline soils. We have such winter problems different from them, we have rain in the fall, but they don't have rain in the fall. We have all these things that we have to contend with, and yet with all of the negatives, so to speak, I can still make wine with New Mexico grapes and compete with everybody else in the nation. That's a big—that's something that I really enjoy doing. (Fred)

Scholars have called for a distinction between "opportunity creation" and "opportunity identification", where the former refers to potential source of profit generation that has remained undiscovered and the latter refers to known prospects waiting to be exploited (Morris *et al.*, 2002; Shane and Venkataraman, 2000). As indicated by Fred's quote (see Table I), he created opportunity when he tilled the land first and then wondered what to grow. He progressed to opportunity identification where he was aware of wine production in the area, explored learning opportunities and undertook the task of winemaking and pursuing it as a livelihood. The subsequent quotes in this theme indicate a continuum where NM winemakers begin with the idea of earning a livelihood through grape cultivation and winemaking and later progress to creating signature wines and specific brand identities:

For me being a New Mexico winemaker is kind of like the old West or something. It's a frontier that has not been explored yet, so there are all the possibilities in the world and all the freedoms in the world. I can make it what I want it to be. I can make something of quality here, or not. I can do whatever I want, so it's very exciting to me, being a New Mexico winemaker. (David)

This aspect of EM opportunity creation dimension demonstrates the effectuation orientation where decision makers (here, the winemakers) rely on "who they are, what they know and who they know," (Sarasvathy, 2001, p. 250). The winemakers

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transformed the very disadvantages (geographical constraints, operation issues) into learning experiences (branding the pioneer spirit of the land, distinguishing NM terroir as a collective regional identity, while at the same time blending signature wines and creating signature labels of their own) that they learned to master like true pioneers in a harsh landscape. The pioneering stories of NM winemakers are embedded in their wineries and wines which display EM dimensions of enthusiasm and zeal.

*Survival of the fittest: proactiveness and innovation*

As EM dimensions are intertwined (Fiore *et al.*, 2013; Kraus *et al.*, 2010; Morris *et al.*, 2002), this theme is aligned with the opportunity dimension and describes how NM winemakers learn intricacies of winemaking and sustaining a profit-generating business through proactiveness and innovation. The concept of survival has largely been ignored in EM literature but our findings suggest it is an important component of how NM winemakers maintain their livelihood from one season to the next. Winemakers narrated stories of how they had to learn about the unique challenges of growing grapes in the NM landscape. However, narratives revealed subtle differences between risk-minimization and risk-taking of how NM winemakers were proactive and innovating in their business practices. Where risk-minimization refers to reducing economic and financial losses (e.g. Fred's proactive efforts to cater to the common palate) in the wine business, risk-taking involved pursuing innovation without knowledge of the outcome (e.g. Fred's experimenting with new varietals).

I would travel to California and I would get hundreds of cuttings given to me. I checked them on the airplane, and brought them home. So we planted those, planted this whole section here, the one that had so much winter damage this year [points outside]. The plants grew really well and everybody wanted those varieties [...]. In 1980s the state was offering compensation if you would demonstrate solar-powered irrigation. So I worked with some people designed a system and I submitted a proposal to the state and they gave me money to put this irrigation system in. (Fred)

For some winemakers, surviving meant to “make what sells”. Fred's winemaking philosophy leaned towards a modern approach, where economic gains trumped the old-world charms of traditions and heritage. He makes wines that appeal to common taste even if it did not agree with his own discerning palate. “Everybody makes Cab, Merlot, Chardonnay, [and] Pinot Noir”, said Fred, And I don't want to be a “me-too” winery. “I want to be unique”. Fred's tendency to identify opportunities through proactiveness was evident as he designed and built a solar-powered irrigation system to take advantage of government subsidies for sustainable energy initiatives. This affirms a “purposeful engagement” with the environment to maximize opportunities at his disposal. Bob, in contrast, emphasized fun at work (see [Table I](#)). He believes in improving season to season through experimentation while simultaneously demonstrating proactiveness by scientifically testing his wines to ensure quality expectations of the broader wine industry. Bob sought out new markets by taking advantage of online distribution opportunities, which showcase his innovative streak towards creating a distribution channel that transcends the disadvantages of geographical remoteness of his winery:

The first success is to be able to grow a vineyard where a lot of people failed before. The other success is, I entered some wines in important international wine competitions and scored pretty high with some of the wines. So that was another success because I'm a small guy in

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New Mexico and they don't know where that is [...] I think you never feel accomplished. No. Always continue fighting to improve the quality of the product. It comes out in the wine, and also the vineyard. Continue changing, be better. (Edgar)

The EM framework does not offer insights into the importance of one dimension over the others in specific situations. For instance, we found that proactiveness was a strong driver towards reducing risks and surviving in NM's harsh landscape. Several winemakers spoke of learning how to grow specific varieties suitable for the NM terroir through trial and error that required years of hard work. Similarly, to establish wider brand recognition, participants' learnt blending techniques to produce good quality wines. Some participated in prominent wine festivals to prove their mettle and validate their winemaking skills. Here, winning was secondary to the need to be recognized as a wine region. The medals on the walls offered a sense of validity that participants could show visiting customers. These types of actions are important proactive measures designed to showcase their pioneering efforts and achievements. The underlying impression from this discourse is long-term business survival, to create a footprint in the American wine industry and generate name recognition through proactiveness, such as by creating unique flavors only available in NM.

David emphasized scientific winemaking education as paramount to making superior quality wines. He incorporated latest technical advances in the operations. Winemaking is rarely foolproof, as was evidenced when majority of his 2002 vintage came out smelling like rotten eggs. In cases such as this, participants' proactiveness combined with the zeal to learn from mistakes was evident. He proceeded to educate himself further to reduce risk of failure. Such stories of learning from failures made their way into consumers' experiences as the winemakers' regaled customers with humorous stories and tours of the winery. There are underlying subtle conflicts between winemakers' personal philosophies on winemaking and real-world demands of surviving in the business. Fred innovated through winning prizes for sweet wines. These prize-winning labels have no bearing on his winemaking philosophy, but they help pay his bills and allow him to sustain his livelihood. On the other hand, David is completely immersed in perfecting highest quality wines through technical prowess irrespective of market demands. He believes quality will prevail over uninformed taste preference. The dynamics between customer involvement in the value-creation process and application of innovation through proactiveness is evident when winemakers were compelled to choose between revenue generation and higher-order aesthetics of making sophisticated wines. This is further explored in the next theme.

#### *Customers know best (or do they?): value-creation via customer participation*

The close association between EM dimensions (Kraus *et al.*, 2012; Maguire, 2010; Mort *et al.*, 2012) is evident as innovation and proactiveness are intimately related to value-creation through customer involvement. Participants demonstrated risk-minimizing tendencies as the primary goal was to generate revenue through sales volume. Thus, catering to the needs of their limited customer base was very important. Winemakers demonstrated understanding of customer preferences through personal interactions in their wineries, at wine festivals and other public events. With limited traditional marketing budgets, NM winemakers rely heavily on direct customer feedback and word of mouth for business decisions of what wines to make and sell:

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Every time we create a new product [...] we do three or four samples. We take it to our tasting rooms. People drink it and see which one they like better. [We] get their feedback [...] It's very important that we go out there and listen to people talk about the wine. This is what they're looking for. (Charlie)

Because we're a drop-in winery, we have over 27,000 people a year walking in that door, and honest to God it seems like there's 27,000 different taste buds that walk in there too [...] and when we have a large product offering, people will buy more wine. (Fred)

For NM winemakers, customers are central to the value-creation process. Charlie shared his experience of interacting with customers. Customer participation in the early tastings of new wines helps him determine what to produce and which labels to carry forward. Akin to a symbiotic relationship, these culturally constituted consumption exchanges created business efficiencies in decision-making processes. Although we perceived mostly positive winemaker/customer interface, nuances of disharmony were observed. For instance, Fred expressed frustrations at customers' individualized (in his opinion, often uneducated) palate and limited experience (lack of winemaking knowledge) that clashed with his beliefs and expert knowledge. The need to survive (sustain a livelihood) took precedence over remaining true to creating great wines. Producing quantity (number of wine varieties) over quality to sell more to differing customer palates was also a matter of discontent.

*Resource leveraging through networking: balancing competition and collaboration*

As winemaking requires expertise across multiple fields, it appears that the EM dimension of resource leveraging influence other dimensions such as innovation, risk minimization and value-creation. Cooperative arrangements among entrepreneurs can be successful if the cooperative groups have similar goals and each group has the freedom to advance their own ventures (Alonso, 2011). NM winemakers constitute a micro-subculture, where they share common experiences in a specific region but also compete independently for customers within the overall domestic US wine industry. Within this small community, everyone knows one another, and most belong to groups like the NM Vine and Wine Society and the New Mexico Wine Growers Association that provide professional support:

And there are genius tricks of the trade that I try to share with other people because they'll make better wine. And that reflects better on me. If people's perception of New Mexico wine industry is good then I don't have to fight the battle of bad wine, bad perception. (Fred)

We always exchange ideas, if you have some problems and someone has the same problems you have, stuff like that. Also it's a business. I sell grapes to them. Maybe they're selling something else to me, stuff like that. So, we interact. If it goes well for me, it goes well for them too. If it goes well for them, it goes well for me. (Edgar)

More experienced winemakers like Charlie and Fred often mentor newer winemakers in the region. Edgar grows grapes and sells to others who cannot grow enough to sustain their businesses. NM winemakers rely on each other for resolving problems countered in day-to-day operations, as well as planning ahead for future requirements. A common concern among our participants was the development of NM's regional wine identity. The established winemakers did not want start-ups to produce bad wines which would negatively impact the NM wine brand identity. They offered assistance to minimize the risk of new entrants tarnishing the region's image (e.g. by using unverifiable stories of

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NM's history). There was also a sense of "giving back" to the profession as they recounted stories of how they received help when they were novices and how being a part of winemakers' community entailed helping others in return:

It's such a small community; almost everything in the wine industry has to get shipped to you. You can find yourself stuck in a bind quite often. Good relations are key; we help each other out a lot. In terms of winemaking, our philosophies tend to differ, so we try not to talk about wine a lot with each other. I think it goes both ways—they don't want to talk to us; we don't want to talk to them necessarily. As far as good working relationships, if I don't have capsules or I need a dozen bottles, whatever it is, definitely share product or sell product back and forth. (David)

There seemed to be an inherent conflict between competition and collaboration as smaller winemakers strive for uniqueness that sets them apart from the more established wineries. One winemaker goes against the "make what sells" philosophy of several well-known wineries that produce sweet wines to satisfy consumer demand. There is a strong sense of not wanting to "sell-out" and compromise personal philosophies. While these winemakers are unwilling to share their winemaking trade secrets, they co-operated in other operational areas such as grape growing and selling and general operational activities of blending. The balancing act of competition and collaboration while leveraging available resources is evident in the ways winemakers networked. NM winemakers lack sophisticated and often expensive winemaking equipment, climate control features and cold storage, such that essential items for growing grapes and making wines are shipped from other locations. Some winemakers also face the pressure of purchasing grapes from other growers when they are unable to produce sufficient quantities of their own. Relationships have to be maintained over time to secure help from others, while at the same time care must be taken not to ruffle feathers when it came to differing personal philosophies and business practices.

## **Conclusion**

This study contributes to existing knowledge by demonstrating underlying EM dimensions in winemaking business practices of an emerging wine region. Unlike other products where there may be an initial start-up period which goes onto steady operational processes with maturity and growth, winemaking requires a continuous learning commitment. Winemaking in NM is challenged with continuous uncertainties such as availability of grapes, steady flow of customers and acquiring and managing finances. Hence, irrespective of number of years in business, pursuing opportunities through proactiveness and innovation, minimizing risks through resource leveraging and creating value through customer interaction are often carried out with the basic idea of survival. NM winemakers exhibited gregarious tenacity to learn from mistakes to ensure business success. Such a dense inter-relationship amongst EM dimensions may be attributed to the need to survive given the uncontrollable risks associated with undertaking the wine business in a challenging region.

In the winemakers' narratives, there is evidence of sheer passion towards embracing unknown adventures. Thus, although a core EM construct (one that differentiates EM from conventional marketing), has not been explored or articulated in extant literature (Gilinsky *et al.*, 2010; Kraus *et al.*, 2012; Morris *et al.*, 2002, Mort *et al.*, 2012). It is important to recognize the pioneering spirit of the individual whose passion and zeal may be a stronger driver than rational business activities. Dufour and Steane (2010) in their case study of one winery found that passing on beloved family traditions was the

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central motive for the individual who founded the winery. This appears to fall within the passion and zeal of pursuing opportunities in EM literature, which contrasts from rational marketing objectives of profit and growth (Morris *et al.*, 2002). From a different perspective, NM winemakers actively resisted misrepresentation of heritage (e.g. Strickland *et al.*, 2013 of how “New World” wineries attempt to establish credibility by constructing “stories” of family heritage as a marketing technique to compete with “Old World” wineries). In contrast, NM winemakers’ discouraged questionable practices and encouraged improving product quality to enhance the region’s image by leveraging the pioneering aspect of making wine in a region where one would least expect it. Contrary of trying to fit in with the establishment, they actively marketed their pioneering spirit of achieving the unexpected in an industry known to place value on tradition and heritage. Instead of despairing over NM’s lack of regional identity, they were proactive in highlighting the pioneering nature of their endeavors to create unique customer experiences. Winning medals in prominent wine festivals was a signal to indicate their pioneering achievement of succeeding despite the odds (not necessarily establishing legitimacy as posited by Mort *et al.*, 2012).

Our findings suggest that opportunity creation is a central aspect of EM. With experience and gained expertise, NM winemakers actively identify opportunities to sustain their livelihoods for the long term. We found that managing risk involve distinct business practices that were pervasive across other EM dimensions (rather than a separate dimension posited in the theoretical framework). To reduce risks, (e.g. securing grapes and distribution channels), the winemaker manages it with taking a risk (e.g. sharing knowledge with competitors). Risk management practices were inclusive of the proactiveness and resource leveraging EM dimensions. Working in collaboration with other wineries emphasize the “unplanned” and “visionary actions” of the entrepreneur (Morris *et al.*, 2002, p. 4), and enmeshing of EM dimensions. Proactiveness is an “aggressive competitive orientation” (Lumpkin and Dees, 1996) with first-mover advantages. To teach new winemakers and cooperate with competitors seems contradictory to entrepreneurial aspirations. Thus, for the winemaker to pursue possible future competitive advantages, he manages risk by leveraging current resources through cooperative efforts with other winemakers.

We found EM activities by NM winemakers are not geared towards improving economic performance by minimizing systemic failures in a rational manner (Mort *et al.*, 2012). This is likely because the region does not have an established operational system enjoyed by larger wine regions (e.g. Napa Valley California). In NM, much of winemaking depends on grape harvest and selling adequate volumes that sustaining their businesses takes priority over everything else. We found little evidence of planned, traditional marketing efforts. NM winemakers relied on personal beliefs (quality over revenue), or time-tested customer preferences (fruity blends over sophisticated flavors), and personal creative agency (designing labels and naming wines according to their perceptions and creativity of family members/employees). Participants were proactive in experimenting with different grape varieties to find the best that survived NM’s harsh climate. They experimented with different techniques to blend wines, and interacted extensively with customers to create wines that would sell. NM winemakers recognize business opportunities to directly involve end-users in the product development process to minimize risk of failure, maximize operational efficiencies (less waste and faster timeline), not to speak of emotional gratification of positive encouragement from the

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very people they want to satisfy. However, there were conflicts involved when higher-order winemaking philosophies clash with buyers' whims. We found such decisions to be a source of contention for participants.

Given its exploratory intent, this study is limited to the unique cultural aspects of the NM wine region. Although participants were varied and were representative of the diverse terrain of the state (which pose different challenges as discussed above), they chose to be a part of the study, leading to some self-selection bias in our small sample. Descriptive results of the study, although rich in detail, lack empirical measures to profess generalizability across different populations of winemakers. Given that there are several distinct wine regions worldwide, there is potential for further investigation of EM activities, which are discussed in the next section.

#### *Implications and suggestions for future research*

Beverland (2000) and Richardson (2004) called for further research into the study of small- to medium-sized (SME) wine businesses from concerns that without a clear strategy and sufficient resources, survival is difficult. Beverland (2000) postulated that success for SMEs may depend on strong brands and efficient distribution channels. The findings of our study posit an alternative perspective. While traditional business processes knowledge and conventional marketing practices exist in established, large-scale wineries, our study provides evidence that there is room for the risk-taker, the proactive entrepreneurial marketer who will attempt to leverage limited resources to operate a business and collaboratively build a new wine region. It is generally understood that a wine's signature distinctiveness may be an indication of its quality to prospective customers (Boudreaux and Palmer, 2007; Maguire, 2010), where previous findings indicate that winemakers adopt novel methods to distinguish their offering from the competition. These novel practices may indicate EM efforts that deserve further attention from wine scholars. Unable to utilize inherent advantages of belonging to an established region, the EM winemaker may create wines that will appeal to consumers who enjoy a good story in favor of the underdog. In doing so, the winemaker will likely demonstrate a healthy dissatisfaction (Morris *et al.*, 2002) of the status quo and respond to market opportunities to create memorable wines with pioneering stories behind their creation. As there are wineries in every state in the country today, perhaps EM dimensions may offer useful learning ground for aspiring winemakers.

Thus, our study offers a primer for aspiring winemakers, who may want to know the experiences of EM winemakers. The participants are individuals who embraced the wine business as a second career, with little or no prior knowledge on how to run a winery. Success in wine requires special education in several interconnected processes such cultivation, fermentation and blending, where failure in one may jeopardize the business. Outside of this special knowledge, however, winemakers can survive and succeed by adopting EM practices. Passion, zeal and enthusiasm are believed to be at the heart of EM. We believe the varied combinations of EM dimensions deserve a closer look by future scholars, especially in wine business. For example, we found that survival was the primary component of EM by NM winemakers that influenced all other dimensions. The challenges experienced by another small wine region (for e.g. Wisconsin) may be different. How winemakers manage risk is another area where EM dimensions may aid in nuancing the subtle differences between risk-taking and risk-reducing practices. In the challenging environment of NM, our winemakers are surviving in conditions that



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are unforeseen, non-linear and full of risk. For instance, acquisition of capital may influence how winemakers utilize other EM dimensions. Perhaps future scholars can examine how winemakers mitigate financial risks (such as bank loans and credit card use) through EM efforts.

We referenced current developments in the EM paradigm, where a scale has been developed to aid in hypothesis testing of EM behaviors (Fiore *et al.*, 2013). Given that winemaking is dependent on specific geographic, economic and personal variables, we recommend a multi-method approach. For instance, qualitative research could be utilized to flesh out the unique business environment of a specific wine region. Knowledge from this study could then be utilized to adapt the EM scale, which in turn will generate rich results to further our knowledge in this domain. Our findings indicate that NM winemakers demonstrate joy and satisfaction in their organic and intimate interactions with customers. They attribute some of their bestselling vintages and labels to organic and spontaneous customer interactions. Therefore, future scholars could examine how customers' influence affect adoption of innovation by winemakers. Additionally, cross-cultural comparisons between small and emerging wine regions could lead to further insights about EM dimensions in winemaking business.

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