

South African wine farm worker heritage stories and the potential for ethical value generation: pilot study findings report

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**South African Wine Farm Worker Heritage Stories
and the Potential for Ethical Value Generation:
*Pilot Study Findings Report***



January 2021

South African Wine Farm Worker Heritage Stories and the Potential for Ethical Value Generation: Pilot Study Findings Report

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Ms Vivian Kleynhans, Seven Sisters Winery

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Abstract

The pilot study focuses on the potential for South African wine farmworkers to take on a more active role as co-creators of winery brand value, and for wine farmworkers' heritage stories to generate ethical value in a major export market (the UK). The project aims to:

- develop a multi-stakeholder perspective on South African wine farmworkers' heritage stories (reflecting wine farmworkers and wine producers, and export market (UK) wine consumers and intermediaries);
- demonstrate the potential of farmworkers as active co-creators of winery ethical brand value, and of farmworker heritage stories for ethical value creation in a major export market (UK).

A review of research on how ethical value generation and value claims are articulated in the premium wine market highlighted the shortcomings of certifications as devices for product differentiation. In contrast, research underscores the power of *evidence-led, credible, authentic provenance stories* for achieving competitive advantage for premium wineries. Provenance stories are understood as outcomes of co-creation processes involving multiple actors all along the value chain, yet farmworkers remain a largely absent and unacknowledged group of stakeholders—both as subjects of provenance stories and as storytellers.

Findings are then reported from the five-phased qualitative, interpretivist research design, which explored the ways in which heritage, place and provenance shape South African wines' presence in the marketplace, and the experiences, perceptions and evaluations of a network of stakeholders—farmworkers, producers, consumers, intermediaries—involved in the realization of brand value for South African wines.

Key findings are summarized along with the potential implications and opportunities suggested as to the potential of farmworkers to be powerful frontline storytellers of evidence-led, credible, authentic provenance stories.

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- Ms Vivian Kleynhans, Seven Sisters Winery

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Cover image credit: 'Grape Picker;' photographer, Stellenbosch Wine Routes; sourced from [Wines of South Africa Media Library](#)

Introduction

This project develops an innovative approach to understanding how forms of marginalised heritage can help realise sustainable development. It explores the potential for South African wine farmworkers and their heritage stories to generate forms of ethical value. The project aims to:

- develop a multi-stakeholder perspective on South African wine farmworkers' heritage stories (reflecting wine farmworkers and wine producers, and export market (UK) wine consumers and intermediaries);
- demonstrate the potential of farmworkers as active co-creators of winery ethical brand value, and of farmworker heritage stories for ethical value creation in a major export market (UK).

To deliver on these aims, the project employed a multi-phase, qualitative research design to deliver the following five objectives:

1. How is ethical value communicated to wine consumers? A media analysis of consumer-facing winery marketing communications examined the different dimensions of ethical value and relative presence of farmworkers and farm work, and identified continuities and differences between a sample of South African wineries (n=30) and a comparable sample of wineries from France, Italy and Australia.
2. What role does heritage play in wine owners' understandings of a wine's value proposition? A pilot semi-structured interview with a South African wine brand owner explored their views of resonant aspects of personal and place heritage in terms of their wine brand.
3. What are the features of farmworkers' heritage stories? Two focus groups with wine farmworkers explored their stories of growing up on farms, and their connections to place and to the farm's end product—the wine.
4. How are South African wines and wine farmworker heritage stories perceived and received by UK high involvement wine consumers? Semi-structured interviews with a small sample explored what associations consumers hold for South African wines, and how they responded to a set of examples of ethical value representations.
5. How are ethical value claims and wine farmworker heritage perceived by UK wine intermediaries? A pilot semi-structured interview with a UK independent wine merchant explored what attributes they looked for in South African wineries, and how they responded to a set of examples of ethical value representations.

The analysis adopted an interpretive stance towards the data, with the marketing communications, focus groups and interviews understood as contingent and interdependent moments in a process of value co-creation, which involves a network of wine market actors (Bjurklo et al 2009; Merz & Vargo 2009). While research attention has typically focused on wine producers and consumers as key actors in value co-production, this pilot highlights the potential contributions of farmworkers in the co-creation of ethical value.

Market Differentiation and Ethical Value

The pilot study focuses on the potential for South African wine farmworkers to take on a more active role as co-creators of winery brand value, and for wine farmworkers' heritage stories to generate ethical value in a major export market (the UK). This section of the findings report reviews key themes in the academic and market research on the wine market and wine consumers, to establish the academic context for the project.

The challenges of differentiation

Wine consumers face a vast range of choices. In the UK, the primary purchase site for wine is supermarkets (Mintel 2020), which often carry hundreds of different wines from producing regions around the world—as any visit to the Tesco wine aisles will demonstrate!



The global wine market is an intensely competitive environment. As in any market, competing brands must find ways to set themselves apart in the eyes of consumers. However, wine brands face particular challenges in achieving differentiation (Olsen et al 2016). The sheer number of wineries globally, and the small number of major wine brands (Brand Finance 2020) results in an especially crowded marketplace.

Wine consumers are typically driven by taste and price (Mintel 2020). Yet, in the absence of past experience and/or expert insight, building 'trust in taste' requires the consumer to take a leap of faith. Thanks to overall improvements in viticulture, bottling and distribution, producing 'quality' wines alone is not enough to accomplish differentiation and secure consumer trust. Wine purchase decisions typically rest on complex communicative signals and cultural conventions. Extrinsic cues and credence characteristics (such as origin or ethical labelling) are of crucial importance for bridging the trust gap (Fernqvist & Ekelund 2014). At the same time, consumers' perceptions and experiences of wine and taste are shaped by their socio-cultural background (Priilaid 2007) and by the established cultural hierarchies of legitimacy that associate some wine varieties, styles and producing regions with notions of good taste and legitimacy (Smith Maguire 2018a).

Thus, the product alone is not enough; differentiation for wine brands requires credence cues. Research highlights three constellations of credence cues linked to ethically-responsible production practices through which winery marketing communications can achieve meaningful differentiation in the eyes of consumers, in relation to provenance, justice and sustainability (Overton et al 2019). One approach to communicating provenance, justice and sustainability credence cues is through the use of certifications; however, the evidence is mixed in regard to the efficacy of certifications to build consumer trust in taste.

Differentiation through certification: not (necessarily) the way to go

In the South African context, several industry-wide and/or global multi-stakeholder initiatives—many with associated certifications—serve to communicate wine production

ethical values to consumers (Flores 2018; Overton et al 2019; Moscovici & Reed 2018; Priilaid 2007), including:

- Provenance: Wines of South Africa (WOSA) and certification under the Wine of Origin Scheme
- Justice: Fairtrade (with South Africa securing the first wine Fairtrade certification); Wine and Agricultural Ethical Trade Association (WIETA); Wine Industry Value Chain Round Table (WIVCRT)
- Sustainability: Sustainable Wine South Africa (SWSA); Integrated Production of Wine (IPW); Biodiversity & Wine Initiative (BWI).

However, there is mixed evidence for the efficacy of such certifications in delivering positive differentiation and competitive advantage. First, while buying ethical goods may offer a ‘feel good’ factor and positive self-affirmation (Schoolman 2019), certifications may also be counterproductive, creating consumer confusion and/or eliciting scepticism that can undermine the promise to generate trust (Annunziata et al 2011; Capitello & Sirieix 2019). Second, certifications may not be fit for purpose in terms of protecting against the abuses that they ostensibly regulate (MSI Integrity 2020). Third, the evidence is mixed as to the effect of certifications on assessments of value and purchase behaviour: some research indicates a willingness to pay associated with justice-oriented certifications (Saayman & Saayman 2019; Wang & Chen 2019) and origin-oriented quality signals (Boatta et al 2011), while other studies indicate that eco-oriented certifications may actually be associated with negative quality assumptions (Rojas-Méndez et al 2015).

Finally, consumers’ uses of certifications may also not be fit for purpose: research suggests that certifications are often valued as a proxy for quality production rather than for ethical practices per se (Flores 2018; Forbes et al 2009; Schäufele & Hamm 2017). As such, certifications may not be worth the effort: the administrative and organizational costs of securing certifications do not necessarily generate superior premiums in the marketplace as compared to those generated through self-declarations (Fanasch & Frick 2020). It is with these forms of brand self-declarations—i.e. marketing communications and storytelling—that the pilot study is concerned.

Differentiation through stories

Given the above, the pilot study focuses on *stories*, not *certifications*, as the vehicles of wine brand differentiation and ethical value creation. In doing so, the theoretical position adopted is one that understands differentiation—and brand value more widely—as ‘co-created’ through the interactions ‘among the ecosystem of all stakeholders’ (Merz & Vargo 2009: 338). This ‘service dominant’ approach (Bjurklo et al 2009) is mindful not only of ‘the firm’ (the winery) in creating brand value, but also a host of other organizations and actors, including industry regulatory bodies and professional associations, critics and retailers, awards and wine fairs, cellar door staff and visitors (Aqueveque 2015; Allen & Germov 2011; Smith Maguire & Charters 2020; Strickland et al 2013). Research attention has typically focused on cultural producers, intermediaries and consumers as key actors in value co-production; in contrast, the pilot highlights the potential contributions of farmworkers in the co-creation of ethical value.

Stories are especially potent vehicles for considering farmworkers' contributions to the co-creation of brand value, as storytelling is a highly democratic and inclusive cultural form that draws on existing oral, visual, textual and—increasingly—digital practices of recording and sharing one's experiences (Tacchi 2009). A focus on storytelling thus enhances the capacity to include new—typically marginal, silenced or absent—actors in understanding the co-creation of winery brand value.

Farmworkers may be focal subjects in justice-oriented certifications such as Fairtrade, but are noticeably absent as the subject of, and storytellers for wine stories. This absence is all the more striking given the overwhelming attention in the premium wine market to quality claims linked to 'wine with a face': stories that communicate the biographical specificity of wines. An emphasis on the human element of winemaking—winemakers, wine making families, the *savoir faire* of a regional population, the hand-crafted dimensions of viticulture—is a central thread in the credence cues for premium wines (Downing & Parrish 2019; Smith Maguire 2018a; Triana 2019) and other high involvement, artisanal and authentic food and drink goods (DeSoucey 2016; Johnston & Baumann 2007; Jordan 2015; Singer 2018).

Research on differentiation and brand value underscores the primacy of provenance-based stories in particular, and—more so—the importance of *evidence-led, credible, authentic provenance stories* for premium wines (Downing & Parrish 2019; Smith Maguire 2018b; Warman & Lewis 2019). Effective, compelling provenance stories communicate where a wine was produced, by whom, how and when, rendering these attributes as tangible, legible and credible for consumers (Smith Maguire 2018b). Marketing communications (e.g. labels, websites) are key devices through which that rendering happens, but so too are frontline storytellers such as retailers and cellar door staff (Aqueveque 2015; Boatta et al 2011; Charters & O'Neill 2001).

Authentic, credible provenance stories can ostensibly draw on any and all components of a wine's origins from creation to consumption; however, recurrent anchors have been identified, including forms of biographical specificity ('wines with a face', as noted above), heritage and tradition, and geographic specificity and terroir (Ballantyne et al 2019; Downing & Parrish 2019; Spielmann et al 2014; Triana 2019). Closely aligned with provenance are family stories, which are found to contribute to family firms' competitiveness and sales by enhancing consumers' perceptions of a firm's commitment, trustworthiness, credibility (e.g. in contrast with 'big brands' or 'big corporations') and brand authenticity (Zanon et al 2019). These perceptions enhance brand trust and loyalty while offering consumers opportunities for self-identification and communitarian identification, which in turn can drive sales (Andreini et al 2020; Binz Astrachan & Astrachan 2018). This dynamic is found in wine markets around the world where family firms are typical, such as Italy (Gallucci et al 2015), Australia (Strickland et al 2013), the US (Triana 2019) and Canada (Voronov et al 2013). Family is not only understood as kin (relations by blood and marriage), but also on how employees are absorbed into the family firm to become 'like' family (Smith Maguire et al 2013).

Summary and implications

The global wine market is crowded, and wine brands face several challenges in achieving differentiation in the eyes of consumers. While certifications are one way to signal ethical value and quality to consumers, evidence is mixed as to their efficacy, and the relative

benefits vis-à-vis the administrative and organizational costs of obtaining and maintain certifications. In contrast, research underscores the significance of credible self-declarations of ethical practices, and authentic provenance and family stories for achieving differentiation and competitive advantage for premium wineries. Despite recognition that provenance stories and brand value are the outcomes of co-creation processes involving multiple actors all along the value chain, farmworkers remain a largely absent and unacknowledged group of stakeholders—both as subjects of provenance stories and as storytellers. Nevertheless, established provenance conventions (such as ‘wine with a face’, heritage, tradition and geographical specificity) suggest an *opportunity for farmworkers to be powerful frontline storytellers of evidence-led, credible, authentic provenance stories*. Such stories might draw on their material engagement in the vineyard, cellar and beyond, and their personal and collective heritage as vital members of farm families and communities.

Pilot Study Methods

To ensure locally-appropriate research design and impactful outcomes, the South Africa-based data collection was carried out in collaboration with Mr Charles Erasmus from the Wine Industry Value Chain Round Table (WIVCRT), and Ms Sharron Marco-Thyse from the Centre for Rural Legal Studies (CRLS). The data collection for the UK-based consumer research was conducted by Ms Nikita-Marie Bridgeman, under supervision of Professor Jennifer Smith Maguire, in the context of the Sheffield Hallam University MSc degree in Food Consumer Marketing and Product Development.

The pilot study comprised five phases, reflecting the project's five research objectives. These are summarized below; details of the data collection, including samples, are set out in Appendices 1-4.

Phase 1: Winery marketing communications

Phase 1 sought to identify potential points of attachment between farmworker heritage and the existing framings of current market representations of wine ethical value, and to identify how South African wineries compared to some of their global counterparts.

Objective 1: how is ethical value communicated to wine consumers?

- *What are the recurrent framings of ethical value in winery websites?*
- *How do farmworkers and farm work feature—if at all—in these representations?*
- *How do South African wineries compare to their price-point peers from other New and Old World producing countries, in terms of how they frame ethical value dimensions?*

Phase 1 was delivered through a media analysis of Home and 'About Us' webpages for a sample of wineries that have achieved export 'success' in that they are available to high involvement UK wine consumers through well-regarded independent UK wine merchants. The fixed, purposive sample was oriented to typical case sampling (Palinkas et al 2015) reflecting our attention to high involvement UK consumers, and comprised 30 South African wineries, and 10 each from France, Italy and Australia, with an equal distribution across three price points in the premium wine market (detailed in Appendices 1 and 2). The analysis utilized a codebook developed from past wine market research on ethical value (Overton et al 2019) and framings of provenance (Smith Maguire 2018a, b), refined via an inter-coder reliability check with a small, initial sample of 10 winery websites.

Phase 2: Brand owner perspective

Producer/owner and winemaker perspectives on heritage constitute normative content for promotional winery representations. Thus, Phase 2 explored resonant aspects of winery heritage from the perspective of the CEO of a South African wine brand, in order to identify potential commonalities with farmworkers, and for the co-amplification of a winery's ethical value.

Objective 2: what role does heritage play in wine owners' understandings of a wine's value proposition?

- *What role does personal heritage play?*

- *What role does the heritage of place play?*

Phase 2 was delivered through a semi-structured interview with a wine brand owner (details, Appendix 3). With a sample size of one, there was no intent for this data to be representative; rather, the focus is on understanding the potential points of connection between different stakeholders, which could be explored in more detail through a future, scaled-up piece of research.

Phase 3: Farmworker perspectives

Phase 3 sought to generate a compelling record of wine farmworkers' heritage stories, and identify recurrent themes in relation to personal biography and the meaning of the farm.

Objective 3: what are the features of farmworkers' heritage stories?

- *What was it like growing up on the farm?*
- *What aspects of the farm or farm life make it unique or meaningful?*
- *What connection do farmworkers feel to the final, end product: the wine?*

Phase 3 was delivered through two 'storytelling' focus groups with farmworkers (details, Appendices 1 and 3). Storytelling as a method enables resilience, reflective practice, and a shared, scalable learning process to underpin future planning for change (Tacchi 2009). It is an inclusive framework that builds on existing cultural practices and experiences of voicing one's own story and helps break down expert/layperson boundaries, thus bringing to the fore voices that are often marginalized in hegemonic narratives of agricultural heritage and provenance.

The focus groups were facilitated by Sharron Marco-Thyse, with assistance from Charles Erasmus; due to Covid-19 related travel restrictions, Jennifer Smith Maguire attended via Zoom. Workshops were recorded, transcribed and translated, where needed, from Afrikaans.

Phase 4: UK High Involvement Consumer perspectives

Reflecting the project's aim of demonstrating the potential for farmworkers and farmworker heritage to generate real value in a major export market, Phase 4 focused on the perceptions of UK high involvement wine consumers.

Objective 4: how are South African wines and wine farmworker heritage perceived by UK high involvement wine consumers?

- *What associations do consumers hold for South African wine generally?*
- *How do consumers respond to different forms of ethical value appeals?*
- *Are consumers interested in hearing/seeing more about farmworker heritage?*

High involvement consumers are understood as those for whom wine holds particular meaning as a source of interest, pleasure and self-identity (Bruwer et al 2014), which leads to greater effort, attention and—typically—budget devoted to wine, frequency of purchase and consumption, and greater than average use of independent wine merchants as their point of purchase. A sample of six such consumers was recruited via snowball sampling, five of whom were recruited through an independent wine merchant (see Phase 5; details in Appendix 4).

Thus, the majority of the sample is part of the same social network with a close relationship with the independent wine merchant who is a long-standing promoter of South African wines: this is a highly specific niche of high involvement consumers. The sample is not intended as representative of the wider UK high involvement wine drinking population, but suits the exploratory nature of the pilot project.

The respondents' wine habits mark them as higher involvement than the average UK wine consumer:

- 100% of the sample buy wine from a specialist shop *at least* monthly, in comparison to only 7% of the average UK adult population buying wine in a specialist shop at least every six months (Mintel 2020);
- 100% of the sample spend an average of at least £7 per bottle, in comparison to 68% of the average UK adult population spending at least £7 (Mintel 2020).

Semi-structured interviews were conducted via Zoom by Nikita-Marie Bridgeman, as part of an MSc dissertation project. A key part of each interview was a 'reception test' as to how the consumers responded to six elicitation prompts featuring either excerpts from winery websites or adaptations from the farmworker focus groups (details in the 'Reception test' section of Phase 4 Findings, page 27). All excerpts were presented 'as if' they were extracts from winery websites to prevent potential bias associated with social desirability. A short questionnaire gathered key demographic and purchasing behaviour information at the end of each interview (see Appendix 4).

Phase 5: Independent wine merchant

Phase 5 explored the views of a UK independent wine merchant, as a complement to the UK high involvement consumer views. Such expert intermediaries are highly influential in realising winery brand value and status within the marketplace (Humphreys & Carpenter 2018) and as gatekeepers who impact on which wines make it to market, and how they are framed (Smith Maguire 2013). They are especially influential in swaying high involvement/expert consumers' views of modestly priced wines (Aqueveque 2015), a category in which many of the respondents placed South African wines (as 'good value for money').

Objective 5: how are ethical value claims and wine farmworker heritage perceived by a UK wine intermediary?

- *What attributes do intermediaries look for in South African wineries to list (i.e. in their gatekeeping role)?*
- *How do they respond to different forms of ethical value appeals?*

Phase 5 was delivered through a semi-structured interview with a single UK independent wine merchant (details, Appendix 4), using the same six elicitation prompts as in Phase 4. As with the wine brand owner interview: this was intended not as representative of the larger stakeholder population of intermediaries (e.g. merchants, writers, sommeliers, and so forth), but as an exploratory data point for understanding the potential points of connection between different stakeholders, which could be explored in more detail through a scaled-up future piece of research.

Data analysis

In keeping with the interpretivist methodology, analysis at each phase of the research design began with an initial familiarization with the data and identification of potential emergent themes, in dialogue with the theoretical understandings of value co-creation (Bjurklo et al 2009; Merz & Vargo 2009), provenance, heritage, storytelling, and ethical value creation (Fanasch & Frick 2020; Overton et al 2019; Smith Maguire 2018b; Warman & Lewis 2019). Phase 1 involved a qualitative content analysis (Zhang & Wildemuth 2009) to identify dominant themes in winery marketing communication representations of ethical value. Thereafter, the analysis followed a thematic approach to the data (Braun & Clarke 2006; Fereday & Muir-Cochrane 2006), with iterative deductive and inductive coding of focus group and interview data, 'reading across' the data sets.

Phase 1 Findings: Winery Marketing Communications

Phase 1 involved an analysis of the relative emphasis on key aspects of ethical value in relation to how wineries present themselves to an external audience, through the platform of their websites. Ethical value—as for credence values more generally—must be ‘rendered,’ that is made tangible, legible and credible for consumers (Smith Maguire 2018b); marketing communications are key devices through which that rendering happens. However, there can be variation in how ethical value is rendered for consumers—e.g. in how justice-, sustainability-, and provenance-oriented aspects of production are framed and communicated through text and images. Sampling for both South African wineries and French, Italian and Australian counterparts—wines from which are all readily available the UK high involvement consumer (see Appendix 2)—allowed a comparison of the dominant framings of ethical value in marketing communications in relation to:

- Ethical value dimensions
- Winery ethos
- Farmworkers and farm work.

Framing ethical value dimensions

First, websites were deductively coded for the main framing of ethical value, reflecting both textual and visual content across both the Home and ‘About Us’ pages. While wineries could have more than one ethical value frame present, they were coded according to their dominant framing in relation to:

- Provenance (e.g. wine of origin; terroir)
- Sustainability (e.g. organic or biodynamic; biodiversity)
- Justice (e.g. Fairtrade; economic empowerment/social upliftment initiatives).

Table: Winery dominant framing of ethical value

	South Africa n = 30	France n = 10	Italy n = 10	Australia n = 10
Provenance	24 (80%)	10 (100%)	7 (70%)	7 (70%)
Sustainability	4 (13.3%)	0	3 (30%)	3 (30%)
Justice	2 (6.7%)	0	0	0

The findings highlight a general tendency for provenance as the dominant framing of ethical value, reinforcing that there is no sharp Old/New World divide in terms of the dominance of provenance as the credence claim for wines (Smith Maguire 2018a). Alongside this similarity across producing regions in the sample, it is worth noting that South Africa was the only country to make justice the dominant ethical value frame for wine brands. It is also worth noting that certifications were a scarce representational device for ethical value: 85% (n=51) of the total sample made no mention of certifications. Of the nine that did, five were Italian, one Australian and three South African.

Second, looking in more detail just at the provenance-frame-dominant wine brands, the analysis then identified the main provenance constituent components. As above: wineries

could have more than one provenance component present, but they were coded according to the single, dominant framing in relation to:

- Family (e.g. reference to the specific word family and immediate variations; descriptions of family members; references to generations)
- Heritage (e.g. reference to the specific word heritage and immediate variations; reference to history/historical roots of the vineyard, vines, wine, winery, etc.)
- Terroir (e.g. reference to the specific word terroir and immediate variations; reference to the specificity of the location, soil, aspect, etc.).

Table: Winery dominant framing of provenance components

	South Africa n = 24	France n = 10	Italy n = 7	Australia n = 7
Family	9 (38%)	6 (60%)	4 (57%)	5 (71%)
Heritage	5 (21%)	1 (10%)	1 (14%)	1 (14%)
Terroir	10 (42%)	3 (30%)	2 (29%)	1 (14%)

Again, there is no sharp difference between South Africa and the others in the sample, or between Old and New World producers; however, there were some differences, with more consistency (or, put another way, narrowness) in anchoring provenance primarily to family in France, Italy and especially Australia, compared with more variation for the South African wine brands.

Greater representational variation for South African wines, compared with more standardization across the other wines, was also found in the descriptive language of wineries' ethos or philosophy of production, as discussed below.

Framing winery ethos

Brand ethos is an important framing anchor for wine provenance and authenticity (Smith Maguire 2018a). 'About Us' webpages are key sites for communicating brand ethos as part of the 'authenticity work' (Koontz & Chapman 2019) that brands do to establish trust and credibility in the eyes of consumers.

An analysis of the descriptive language in the winery 'About Us' pages revealed a high level of similarity between the different producing regions' wineries, with quality, passion, creative and tradition being among the most common terms. This is illustrated through the data visualizations in the Figure below.

What emerges is a common, conventional vocabulary of quality, passion, creativity and tradition. Alongside this commonality, however, the visualizations highlight the greater diversity of terms used across the sample of South African websites, suggesting less conventionalization in descriptive language than for the others.

Figure: Comparing the descriptive language for winery ethos

South Africa



Italy



France



Australia



(data visualizations created with WordClouds.co.uk)

Framing farmworkers and farm work

Reflecting the focus of the pilot project, the website coding also captured when winery Home and About Us pages included representations of farmworkers or farm work. As expected, such representations were scarce. While images of winemakers, cellar masters and winery owner family were common, only 25% of the entire sample had any depictions of the farm work component of wine production. Of the South African wineries: 40% (12 of the 30) included images and references to farmworkers; of the rest, only three other wineries (one Australian; two French) had such content. This is clearly a distinctive feature of South African wine brand marketing communications, and links to several known credence cues with regard to provenance (including hand-crafted production, biographical specificity ('wine with a face'), and family connections), as well as links to justice and sustainability, as illustrated through the eight examples (six South African; one French; one Australian) below.

South African examples:

- Provenance (wine with a face)



(Iona <https://www.iona.co.za/> accessed December 2020)

- Provenance (hand-crafted wines; wine with a face) + Sustainability (biodynamic)



(False Bay <http://falsebayvineyards.co.za/> accessed December 2020)

- Provenance (family) + Justice (social responsibility)



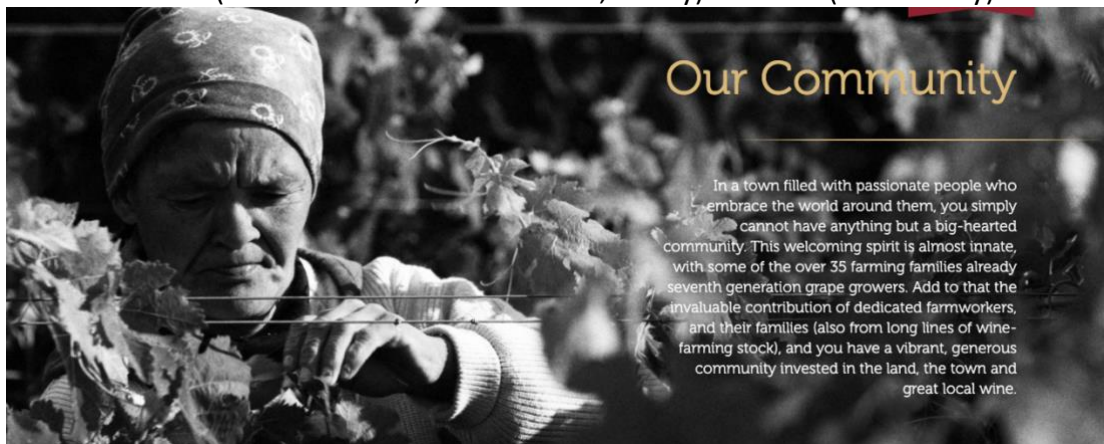
(Simonsig <https://www.simonsig.co.za/about-us/> accessed December 2020)

- Provenance (wine with a face; farm families) + Justice (community/teams)



(Koopmanskloof <https://www.koopmanskloof.co.za/index.html> accessed December 2020)

- Provenance (wine with face; hand-crafted; family) + Justice (community)



(Robertson Winery <https://robertsonwinery.co.za/> accessed December 2020)

- Provenance (wine with a face) + Justice (community/teams)



(Vondeling <https://www.vondelingwines.co.za/meet-the-team/> accessed December 2020)

French example:

- Provenance (winegrowers—wine with a face) + Justice (commitment to the local community)



(Plaimont <https://www.plaimont.com/en/our-winegrowers/> accessed December 2020)

Australian example:

- Provenance (specific locale; wine with a face)



(Shaw and Smith <https://www.shawandsmith.com/about> accessed December 2020)

Summary and implications

The analysis of winery marketing communications highlighted that:

- South African wineries have greater representational diversity in terms of framing ethical value.
- Provenance is the dominant framing of ethical value for wine brands, and family is the dominant component that anchors framings of provenance.
- Representations of farmworkers and farm work is distinctively South African, and communicates aspects of provenance (as well as justice and sustainability).

Analysis of how ethical value, provenance and ethos are framed in winery marketing communications reveals greater variation in the South African brands' framing of producer ethos. This is not necessarily a problem *per se*; further research on consumer perceptions and reception would be necessary to establish if there is a heightened risk of miscommunication or consumer confusion.

The analysis also highlighted the distinctiveness of South African wine brands' representations of farm work (unlike the more general depiction of winemakers, cellar masters and winery owner families, and vineyards devoid of human life), and that these representations reinforce established quality conventions of provenance (wine with a face, hand-craftedness, family), as well as justice and sustainability.

These findings point to a strategic opportunity to rethink how to communicate South African wine brands' distinctive features and core values. Knowing that provenance and family are dominant market expectations and legitimacy cues, South African brands might consider how to amplify their justice and sustainability values by framing them *within* the discourse of provenance. Research suggests that ethical certifications are often used by consumers as proxies for quality production (Flores 2018; Forbes et al 2009; Schäufole & Hamm 2017); framing justice and sustainability cues in terms of provenance (for example, as in the examples: hand-crafted wines with a face and a family) would therefore potentially amplify the taste-related credence qualities most likely to sway consumers. Thus, the findings highlight the need for effective communication of provenance, and the potential for effectively communicating justice and sustainability *through* provenance stories.

Phase 2 Findings: Wine Brand Owner Perspective

Wine brand owners and winemakers (their ethos, heritage, craft and skill) are conventional anchors for framing provenance and brands' 'authenticity work' (Koontz & Chapman 2019; Smith Maguire 2018a). Phase 2 centred on an exploratory interview with the CEO and winemaker of a South African wine brand (see Appendix 3), in order to identify the role of heritage in an owner's conceptualization of a brand's identity and value proposition. The owner is a black, female, first generation winemaker and wine brand owner, who acquired land (in 2009) to create a wine farm under the aegis of a South African Wine Industry Trust initiative. Vines were planted in 2013 and 2014; first wines made in 2016. Two themes from the interview are of particular relevance to the pilot project, illustrated below with exemplar extracts:

- Family heritage as winery heritage
- Grafting family heritage to a new place.

Family heritage as winery heritage

While the wine brand's and vineyard's history are very recent, heritage nevertheless plays a prominent, defining role in the wine brand's story. This is supplied through family heritage, placing a 'first generation' winemaker story into a much longer historical narrative.

*I think leaving the house where we grew up in, and the village, always said to me, it was always in the back of mind that one day I will own my own business ... Land was not part of it, because I didn't dream that far. I just knew that I will have my own business and that I will not be dependent on anybody else. So, for me, it's an independence thing. And on the other hand, also, it is to have a legacy. I mean, we're a first generation wine farm. I wasn't given a farm. I was given a piece of barren land, which I worked into a farm. So, for me that's, yeah, I did not **inherit**, I'm not a fourth, fifth generation wine farmer. I'm a **first** generation wine farmer and the significance of that is that I can tell that story to my grandchildren. ... And I think the things that happened to us made me **more determined** to have my **own land**. To have my **own vineyards**.*

*I think we have a unique space. First of all, like I said, we're a first generation wine farm. We're the only black wine farm in Stellenbosch with this type of space, where people can come to, and experience our **authentic** food and wine pairings, get to know about our story, where we come from and we are on our way to. And I think we just bring **hope** to other people of colour. Give...be able to motivate people to also try to do their own thing.*

Grafting family heritage to a new place

The respondent's family history of hardship and eviction provides a historical narrative and meaning to the farm. For this to be authentic, meaningful and 'real' for the wine brand, the family heritage becomes 'grafted' on to the new place, such that the farm becomes home. This grafting takes place through time, practice, symbols and, importantly, through rituals—such as celebrations and food.

*The vineyards...have a special meaning for me, because 'Yay!!!' (laughs) Vineyards! I mean, that was a **celebration**. We had a celebration when we harvest*

*our first grapes! I mean, you could, you could not **believe** in how we carried on that day. It was a whole festive day. The **families** were in between the vines, and we were...it was a **beautiful** day. And that, we bottled into our [_] range, which is our family name. So, we're very proud of that, the vineyards part of the farm where we have a product that **actually came out of it**, that we would never have dreamt would happen in a million years. You know, all of a sudden, after a long way of hard working, there we have our own grapes. And yeah, that is **very, very** valuable to us, to me as a family, to my son also. He's very proud of having something that we don't have to just purchase from another farm. But we have **created** it ourselves, or been part of in that.*

*When we...launched the building in 2015 of December, and we had the whole year of 2016 we did food and wine pairings and I believe that was a year of **healing** for my family, because they had a home to come to. And we cooked, we cooked the food that my mother used to cook for us, we talked, we had all the old days stories coming up and yeah, that was very significant time for us to really **feel** that we are **not** delivered to somebody else's mercy. Here, we have established, and we've established something for ourselves.*

Summary and implications

The wine brand CEO interview highlights that family heritage is an important anchor for provenance, and can constitute the core of a winery's heritage story, even in the absence of a winemaking history for the land itself. For family heritage to constitute effective and authentic heritage for the wine brand, it must be meaningfully grafted on to the new location, for example:

- over time and through practices (first planting of vines; first harvest; ongoing care and development of the land);
- symbols and stories (erecting winery buildings; telling the family story through websites);
- through rituals (harvest celebrations to cement attachment to place; cooking family recipes in the new house to make it home).

While these are exploratory findings only, they highlight potential opportunities for identifying resonant practices, stories, symbols and rituals through which to meaningfully graft family heritage to wineries, and underpin evidence-led, credible, authentic provenance stories, and thus to opportunities to widen the sources of family heritage to include that of farmworkers.

Phase 3 Findings: Wine Farmworkers Perspectives

Phase 3 focused directly on the wine farmworkers, through two storytelling focus groups and supplemented with a follow up interview with one of the focus group participants (see Appendix 3).



(Photo: author via Zoom and screen shot)



(Photo: Charles Erasmus)

The workshops sought to generate a compelling record of wine farmworkers' heritage stories, and identify recurrent themes in relation to personal biography and the meaning of the farm. While the focus of the pilot was on demonstrating potential ethical value creation on behalf of the wines and winery, there was also evidence of the potential to generate other forms of ethical and social value, in terms of community and individual identity affirmation and cohesion. Recounting such memories through the course of the focus group was received as a positive experience:

It was lovely remembering so many things of our past. (FG2-3)

It was very useful sharing our memories with someone else. (FG2-4)

This chimes with storytelling-based action research (e.g. Tacchi 2009) and bears further research to explore in greater detail.

Four themes from the focus groups are of particular relevance to the pilot project, illustrated below with exemplar extracts:

- Collective heritage
- Family identity
- Nostalgia
- Acquired expertise and pride.

Collective heritage

All of the respondents were born, raised and had worked on farms. The age of the individual respondents ranged from 32 to 66 years; however, in the context of the focus groups (in which many were raised or worked on the same farms), they collectively embodied between 180 and 209 years of collective heritage: a substantial potential resource for deepening and enhancing wine farm heritage stories.

If __ was here and shared her story of how she grew up on the farm you will realise how deep the history of this farm is. Like said earlier you gain experience. (FG2-3)

In the wine industry, when you grow up on a wine farm, there is always a story to tell. Always. So, it is never a dull moment. You never get bored of it. [...] [When] I was assistant manager, so I had to train the students and new staff, so I am always telling fun stories, so everybody tells the same stories to the customers. (Farmworker interview)

Family identity

The collective heritage noted above created the basis of a shared identity as a family. The stories highlighted a particular bond between members of the farm community, which was meaningful for a sense of self and belonging and, in many ways, a source of nostalgic longing. Significantly, the concept of family is inclusive and emergent: newcomers are welcomed in and become like family.

I know it is something about people working on a farm and living on a farm. [...] We had that bond that they had where they used to work and I had where I used to work. If you are a true person then you will always have that bond, does not matter who you are white black, and pink or purple, you will always have that bond. (FG1-5)

If we think about us that was born and grew up on the farm know what it is to have difficult times, we know about being happy, we argue and fight but also to come together to talk and resolve differences. [...] Even new people that moves in next door we welcome them. Kids want to know one another so we all learn to know each other and to create a good environment in which all of us can live together. [Later in the focus group she elaborates:] So it is a family farm but not just about the __ family. When newcomers arrive, they are accepted and become part of the family. We are going to make sure we are happy and safe together. We will treat each other with respect and discipline. I believe when I get there and bring people and they behave badly, those part of the farm community will tell them to leave and go to where you come from because here, we stand together. (FG1-5)

What is unique about [the farm] for me is the fact that we are all family irrespective of child or grandchild. When we walk out with the owner of the farm, we are one. (FG2-1)

*If we have a problem with someone on the farm, we talk it out. What I also find unique is that we can communicate with [the farm owners] with ease. I can go and drive dirt away using a tractor. He will not come to me the next day asking me why I did that and that I did not have his permission to do it. **Our communication is so easy as if we are a family.** (FG2-3; emphasis added)*

Nostalgia

As noted above, respondents' farm heritage stories had nostalgic dimensions: positive reflections on and/or longing for a past time, as a counterpoint to something less pleasant in the present (Ju et al 2016). For example, respondents' happy memories of childhoods and

work on the farm were juxtaposed with noting how things were changing in terms of the shift from farm families to buying in temporary workers. These nostalgic stories are not only marked by sincerity and authenticity, but also foreground particular sites, buildings and people as tangible, credible anchors for provenance stories, and rituals (daily work habits, an annual post-harvest braai, children's games) through which collective heritage is tangibly embedded in place.

As one respondent in the first focus group commented, this sense of family and community is both welcoming and something that is now felt to be missing or waning:

I miss the work in the vineyard and the things you learn every day. Every day was different. Today you do this, tomorrow you do something different and you learn a lot. I also miss the discussions with other people working with me in the vineyard. Now we are no longer together doing work and talk daily. These are the things I miss. (FG1-4)

I grew up on the farm. [...] From my earliest memories I can remember oom ___. He did not have a wife. We as children always gathered at his place every Saturday evenings. Where we have the church building now is where we used to have what we called the committee room. In earlier years there used to be a committee on the farm and that is where they will hold their meetings. Later on [the owner] placed a big television in there. Those years, people did not have TV's at the homes like they do now. We would go there every Saturday evening. [...] Girls and boys would enter that small hall to go watch TV. When done watching TV we would not return home. We went around to [the old man's] house. [...] He would open his door and all of us would enter. It always ended up that we would have fun and play. If we were hungry we made something to eat on his stove and we just continued. [...] I will never forget that small house. Oom ___ died many years ago but that small house is still standing. It was renovated into a church. So this is where we used to get together as children. (FG2-3)

Here by us the owner always gave us a lovely braai [barbeque] after harvest. On that day we party and dance and go on. Some people get wasted from drinking alcohol. Those were things we loved. [Facilitator: What sort of music was it?] It was predominantly boere music to which we Lang-arm danced. On Fridays and close to holiday time then we feel like having a nice get together. The driver would wait for all of us then we go and buy chops to braai and have a nice time together. It is those fun times together I remember. (FG1-4)

..what we did as kids. Because we have a local community school in the area, so we took the bus but the bus would drop us by the main road and then we still have to walk and it's like a 15 minute walk and you have to walk. And then, you know, you're hungry, your thirsty, and we would take grapes... We always picked grapes for us and put it in a plastic bag, the whole bunch, and then we would press it... we would make grape juice, we would just drink it like that. [...] And we played on the farm and we would play everywhere. If it is a ditch with grass we would take our boards, the divider boards, and we would cut it up for each one to have a seat to sit on. We would put a rope on it and the one person – then we would move

each other, so then you go down the ditch, up the ditch, so it was like sailing. [...] It is actually nice growing up on the farm. (Farmworker interview)

Acquired expertise and pride

Many of the respondents referred to the value of learning-through-doing on the farm, and the investments made in their training—both through on-the-job tutoring and mentoring, and through more formal courses. These forms of acquired expertise—for example, in relation to pruning—were sources of pride and identity.

Me together with a few other women who also did not know what to do and was told to go out in the vineyard to help with the pruning. I did not know how to cut and started cutting for the sake of cutting. Our supervisor noticed after a while and stopped me. He told me: 'This is not the way to cut the vine. Cutting a vineyard is a serious business, there is nothing funny about it.' He showed me and it was a big learning experience. We continued to help with the pruning for a couple of days after that and it became an enjoyable experience. Every day I learnt something different. (FG1-4)

*I [worked on the farm] for 22 years. Here I once again learnt a lot. I was sent on a course. I accomplished it and have something behind my name that says I am a qualified gardener and can work with a variety of plants. Vines also counted in that category. **I grew up from childhood with the vine plant.** I was 9 years old when I started working in the vineyard. (FG2-4; emphasis added)*

Another respondent (FG2-2) recounted learning how to prune from two grown men who became his close friends on the farm: 'They taught me well too. During pruning time they would tell me how to do it the correct way.' In turn, he passes these skills on to others:

There is this little girl at our place and when we prune in the vineyard and I might need to step away for a short while. When I returned I always heard her say: 'You must cut correctly, [] is on his way back.' When I walk down the vineyard row and see somewhere the cut was not done correctly, I would ask: 'This cut is not correct, who cut here?' The other workers may say for example: 'Its ___!' By the time I reach ___ she will show me how wrong she cuts the vine. (FG2-2)

In contrast, several of the respondents noted that the current trend of using temporary workers precluded this passing on of skills and connection, with a negative effect on the vineyard:

___ and I will talk then I will tell her while we are walking through the vineyards: 'These vines used to look green and lush in the past and looks pretty dull now. I do not think any wine will come from this vineyard.' [...] Those people do not get taught what to do. The people get picked up [by truck as daily temporary workers]. [...] So no one learns in the vineyards anymore on how to do things. They are messing up the vineyard. Our production has decreased considerably because they do not use trained people. [...] Nobody gets taught anymore, there is no training on vineyard work. [...] People are simply not trained to prune vineyard. At the end it simply does not make sense. On many farms the wine does not taste the same as before, you never see the people working in the vineyard anymore like before.

So the vineyards are not kept neat and tidy anymore, the vines are not cut correctly, the harvest is low. (FG1-5)

In turn, pride in their acquired expertise afforded a route to identifying with, and feeling pride in, the final product of the wine.

I normally argue with people saying the wine maker is the best. It does not start there. It starts in the vineyard because if they don't prune right you will not get a good wine. [and later in the same focus group] This is also why I say if you have no respect for people working in the vineyard then you too mean nothing, it does not matter if you are the owner or boss on the farm and better off, you mean nothing because those people working in the vineyard works extremely hard and they teach each other.[...] They go on the notion that workers finished cutting or harvesting and that is it. The workers are never told, 'We want you all to come to the cellar because we want to tell you about the wine we are making and what happens in the cellar.' It is always the wine maker and his people that get all the shine. It should not be like that. (FG1-5)

I would always say that if you worked in the vineyards market, bottling and labelling, then you grow with the wines. [...] The quality of the wine, the taste of the wine, because that is actually the way that it started. It starts in the vineyard. If they don't work properly there you won't get a good end product out of it, so like the people who are with me, they undertook their work, there were four of them, and they know their story. They've been working in the vineyards for long. They know their story. (Farmworker interview)

Summary and implications

The farmworker focus groups revealed a number of attributes of farmworker heritage stories. The stories are a form of collective intangible cultural heritage that is largely unrecorded and thus precarious in its preservation; yet, they represent immense cultural value (as a source of identity, belonging, pride). The acquired expertise of pruning is another form of intangible cultural heritage and critical to successful viticulture, yet which is largely absent in representations of winery *savoir faire*, and ethical wine production. The nostalgic stories of growing up and working on the farm also hold potential for ethical value creation, furnishing tangible and authentic anchors for provenance stories (people, places, rituals) that could significantly extend and enhance a wine farm's heritage stories. Finally, the accounts of the shared bonds of farm families encourages a more inclusive understanding of family (and its capacity to welcome new members) than is typically deployed in winery marketing communication representations of 'family' wineries. Research demonstrates that family firm stories can enhance wine brand reputation, credibility and authenticity (Andreini et al 2020; Binz Astrachan & Astrachan 2018; Gallucci et al 2015; Strickland et al 2013; Triana 2019; Voronov et al 2013; Zanon et al 2019), thus suggesting the strategic opportunity for farmworker families to contribute to ethical value creation.

Phase 4 Findings: UK Wine Consumer Perspectives

Phase 4 focused on the views of UK high involvement wine consumers. All used independent wine shops as their primary purchase site, and five of the six (UK1-4, 6) were recruited through the merchant respondent (see Appendix 4).

The consumer sample confirmed the general finding of market research that taste and price are the key drivers in wine consumers' purchase decisions (Mintel 2020). Asked if sustainable or environmental certifications were taken into consideration, all but one said it was not a primary criterion. Likewise, ethical practices could be an added bonus, or offer a '*feel good feeling*' (UK4), but the greater concern was quality, price point, the occasion or context of consumption, wine variety and style, and the stories '*that differentiate the wine from the run of the mill*' (UK3). Only one (UK5) expressed an explicit willingness to pay a premium for a wine that was sustainably produced, and consciously sought out biodynamic wines (but regarded Fair Trade wines with scepticism).

Three dimensions of the consumer interviews are of particular relevance to the pilot project, illustrated below with exemplar extracts:

- Views of South African wines elicited consumer associations
- Reception test elicited positive and negative views of examples of marketing communications provenance stories
- Expressions of interest in learning more about South African farmworkers.

Views of South African wine

Respondents were asked for the associations they held for South African wines in general. In response to the question, 'When I say "South African wine, what comes to mind?,' the most prominent responses, equally, were 'good quality' and 'value for money' for five of the six respondents; three mentions were made of 'New World' and two specifically mentioned pinotage. These findings are summarized in the Figure below.

Figure: 'When I say "South African wine," what comes to mind?'



(data visualization created with [WordClouds.co.uk](https://www.wordclouds.co.uk/))

These positive associations reflect and confirm the very specific character of the sample: these are not only high involvement consumers of wine; these are high involvement consumers of South African wine. Three had visited South Africa for wine tourism; one had lived and worked there. All drink South African wine at least six times a year, with four drinking it at least monthly and one weekly (see Appendix 4). They are thus a quite distinctive

niche with which to test the reception of marketing communications that foreground farmworkers.

Reception test

The consumer and merchant respondents were shown a set of six elicitation prompts. These prompts were created by Nikita-Marie Bridgeman, either verbatim or adapted from existing wineries (prompts 1, 3 and 4 are from South African wineries; prompt 5 is adapted from a French winery), or from the farmworker focus group data (prompts 2 and 6).

Table: Exemplar quotes from reception test

<p>Elicitation Prompt 1</p> <p><i>Our team is a bit like the ‘New South Africa’: a cultural and racial rainbow. A blend of ideas, values and purposes. A recipe for innovation and success. And we wouldn’t have it any other way.</i></p> <p>Source: https://www.radforddale.com/about-us Accessed May 2020</p>
<p>Example responses</p> <p><i>I really liked the very first one actually, I thought that gave a good impression, it said that their employees are important to them, it just gave me the feeling that, it suggested that if they care about their employees that they care about the wine they produce and their customers and it just gave me a feeling of comfort with the winemaker. I just felt it was honest and suggested integrity and a number of other things. That was probably the stand-out one. (UK1)</i></p> <p><i>I would put 1 first as it seems a little more personal. It’s more about the people than just the wine. (UK6)</i></p> <p><i>It’s forward thinking, nicely put, not way out there. (UK2)</i></p>
<p>Key themes</p> <ul style="list-style-type: none">• Positive reception• Care for employees as a sign of careful winemaking (i.e. as a quality cue)• Honesty, integrity, personal
<p>Elicitation Prompt 2</p> <p><i>The wine represents us and our stories. The grapes and the wine represent our collective and shared experiences, the joys and the hardships, the highs and the lows, our love of the land, and our identity as a community. The grapes represent our struggles, aspirations, and dreams.</i></p> <p>Source: Nikita Bridgeman (adaptation from focus group notes, FG1)</p>
<p>Example responses</p> <p><i>I thought 2 was a bit pretentious. I thought it was a bit meaningless, and it just reeked of marketing waffle to me. (UK1)</i></p>

If I was going to be influenced by it, I would put 1 first because it seems a little more personal. It's more about the people than just the wine. (UK6)

Number 2 I like so I just ticked it. ...Those ideas actually go together a bit with the sort of things I'd said [in my interview] and that's really important. ... Whether I'd use the words 'our grapes represent our struggles', not sure, but that's being pernickety. (Merchant)

Key themes

- Mixed reception of wording (scepticism of marketing)
- Positive reception by some of the collective ethos.

Elicitation Prompt 3

Since 2003 we have been following an active biodiversity orientated strategy in our farming practices. We are moving away from a mono culture of vines and in the process we are giving back to nature some of what we took from her in the past.

Source: <https://neethlingshof.co.za/our-story/> Accessed May 2020

Example responses

I just thought, well, put it in plain English and I'll respond to it. And monoculture, I have no idea what monoculture is, and I suspect most wine drinkers don't have any idea what a monoculture is. The message is making me suspicious; I'm thinking, 'Are they trying to use long words to confuse me?' I think you've got to keep it simple. I think I've got a pretty good idea of what a biodiversity orientated strategy is but, ah, what a mouthful! (UK1)

The word biodiversity is used quite a lot in wine circles...but different people mean different things when they say biodiversity. [It's like] the Fair Trade thing. For some reason, I don't really know what it is, I think I think I'm a little bit sceptical about it. It's one of those things that I think when it first came out, there was sort of a rationale behind it. And then it just became the labour. And maybe it's just me as a person, I kind of get a bit sceptical now that, you know, this bit like the biodiversity thing. Now, it's like, how can we get this label on our bottle? You know, what's the minimum we'd have to do in order to put this label on because that might mean some more wine, rather than actually, you know, knowing what it is that they're doing that makes it Fair Trade? (UK5)

A bit too many modern words. You could have cut those down. ...I can see where they're coming from, I just think it's a bit pretentious. You could have made that a bit more every day ordinary. (Merchant)

Key themes

- Negative reception from most to the specialist terminology of biodiversity and monoculture (can mean different things, or seen as 'marketing')
- Scepticism of certifications (cross-over from FairTrade to biodiversity)

Elicitation Prompt 4

The family's philosophy is one of minimum intervention. The aim of which is to create top-quality, single-vineyard and appellation wines that intricately integrate the tension between remaining true to the terroir, and finding their own unique expression of it.

Source: <https://www.journeysend.co.za/about/> Accessed May 2020

Example responses

I know what terroir is, but I wonder if most wine drinkers do. I shouldn't think they do. So that was a word I wouldn't personally use. I thought it started off very sincere, I like it, but I thought the second half undermined the sincerity of the first. (UK1)

That's family, that's the one probably, single vineyard, the family working on the land, making it for years and years and years, I love things like that. (UK2)

I get really worried about this word 'appellation.' It's used lots. This is a personal thing. Appellation contrôlée is name control, region control, varietal control, whatever. So appellation, if somebody doesn't actually understand a little bit of French - It's just too wordy. That is me. It's bullshit a bit. I think the whole ethos of all of this is good. I wonder whether they're carried along a little bit by modern day expressionism... (Merchant)

Key themes

- Positive reception of references to family and associated ethos
- Scepticism at marketing and specialist terminology (terroir, appellation)

Elicitation Prompt 5

Our identity has been rooted in history for centuries. From humble beginnings on a small farm to a successful winery that has grown into a proud community. We are fueled by our love and passion for quality, making wine that is the essence of our people and our heritage.

Source: Nikita Bridgeman (adaptation from <https://www.plaimont.com/en/> accessed May 2020)

Example responses

It's a little less specific than some of the others....that could apply to really anyone. (UK6)

Nice but corny for number five. I fully understand what they're saying, it just goes back to the rest. It's all a bit wordy. I'd like to meet these people and sit down with a drink actually and say, okay sweetheart, you're not selling this to me, you've sold it so shall we just get on with it? What's going on here? Open a bottle of wine and let's just chat shall we? You don't need to sell it to me. I just feel - When I read stuff like that I go, hmm, somebody's bought this in, you bought this. (Merchant)

Key themes

- Negative reception: lacks specificity; dislike of 'marketing' feel

Elicitation Prompt 6

Our wine is something our workers can call their own. It embodies their history and who they have become. The wine tells their own story and not someone else's.

Source: Nikita Bridgeman (adaptation from focus group notes, FG2)

Example responses

I like the last one, again it mentioned people, and it was short and simple, and it wasn't flowery it just smacked of sincerity. I quite liked that. (UK1)

The wine tells the workers stories, which I think points out how it's not just the world famous wine maker...but a lot of people involved in producing first of all growing the grapes then producing the wine, and the wine in the bottle is the culmination of the work and tells their story. [It reminds me of] a winery that has impressed me for some years, [where] they have set up ___ where they've set up workers to produce to grow to have their own vineyard to have their own winery to produce their own wines and I think that's a really good development.

[Interviewer: Is that something that would sway your decision, if you knew that a winery had those sorts of practices in place?]

I thinks so, yes. It's um not at the top of the list, but it just makes me feel good about the wine and that the producer makes me feel happier to be buying their wine. (UK3)

It's my perception that in relation to apartheid, it would be that the stories of the workers would certainly get lost. And like, with French wine, you hear about the families who run the winery for 200 years, and obviously that period covers apartheid. So, you know, this gets across how things have evolved and gets across the, you know, the farm was probably started and owned by white people in the greater cases, actually now in the New South Africa, you know, that's, that's changing.

[Interviewer: And that appeals?]

Yeah, absolutely. Yeah. That, sort of, shared sense. And, you know, ultimately, it's still someone still owns the vineyard and someone else still works on it, but it kind of gives an impression that it's kind of like a shared, a shared effort. And I think that that appeals to me anyway. (UK5)

Yeah. Now, this bit I like; our wine is something our workers can call their own, number six, embodies their history and who they have become. The wine tells its own story and not somebody else's. That's quite nice. That goes back, to what I've already said in this interview. (Merchant)

Key themes

- Positive reception
- Simplicity
- Affirms personal values; feel good factor

Expressions of interest

The consumers' responses indicate at least three routes of opportunity in terms of generating value, by leveraging expressions of consumer interest in ethics (especially, labour justice and diversity and inclusion), family and authenticity.

First, there was a clear expression of interest in ethical dimensions of production (albeit not as a primary driver of purchase decisions) and interest in the farmworker dimension of ethical production, as signalled in prompts 1, 2 and 6. This was regarded as novel and largely absent from the current marketplace (only UK3 and the merchant had personal knowledge of specific South African wineries' social uplift and empowerment efforts). Moreover, such messages chimed with growing awareness of injustices closer to home, brought to the fore in 2020 by Black Lives Matter protests and investigations of labour abuses:

The thing that stuck out for me there, especially with Black Lives Matter stuff that's happening at the moment, is around apartheid. How people's perceptions of apartheid might impact what they think about South African wine. I'd imagine that a vast number of the wineries in South Africa are owned by white people. And that it would have been, you know, black people working on the farm, as farmhands and tending the vines and stuff like that. Again, this is an assumption I'm making, but [one of the elicitation prompts] was making the point that actually this is about sort of a New South Africa and, you know, the wines mean something to our people, rather than just our specific family. (UK5)

I would hate to think that the [wine] that I am drinking is coming from people not being treated properly. You know, it's a bit like the stories last year that people that work for Amazon were actually being treated really badly. .In the same way that I'm living in Leicestershire, and they've just now found all these sweatbox type factories in the city that are not paying people properly. It's really bad conditions but they're actually supplying Boohoo. So that's what's come out in the news. (UK4)

*The important thing, from my point of view, is the quality of the wine rather than the way it's produced, where it's produced and how it's produced. **But**, the two increasingly are going hand in hand, because I think, I think in any business now that people are realizing they can't just make an item, whatever that is, without looking after the people who are involved in making it for them, and that's the same with a factory as it is, you know, somewhere outdoor agriculture, as you know wine making is. (UK6)*

Second, there is an opportunity to build on an interest in the family heritage of wineries, and challenge perceptions that farmworkers are not intrinsic to the winery family.

I mean you get to the stage where you've been to say 100 vineyards and the stories are pretty much the same all around, but when you've got little small family vineyards that have been there for generations then they tend to have more of an impact on your memory. [...] The stories of the workers don't bother too much, I get more involved with the families because they're the ones, it's their life and promotes the life and soul of the workers as well but I go more for family-orientated ones rather than the workers are basically there, yeah, you get the odd

story of the worker who's been there for 50 years or the wine maker or something but you know, no it's more about, I go for the actual vineyards themselves, how good they are, what they look like, the families and things like that. (UK2)

Third, there is an opportunity to build consumer engagement and trust by offering evidenced, credible, authentic provenance stories that overcome the scepticism towards marketing and leverage the ways in which social media enables sharing stories. Credible stories can be delivered through winery labels and websites:

You know, you want you want something short, punchy and honest. And that would influence me. (UK4)

I think that people do care more about where the products that they're consuming come from. And the story behind them. And with social media and things like that, it's easy now to get that story out there. In a sort of short, sharp way, you know, nobody's really got time to sit and read hours and hours of content on websites about farmworkers. But if it's short, sharp bits of blurb, maybe the use of video, stuff like that, where people can actually tell their stories and engage people. Personally, I'm more likely to buy wine and the story behind it and that that story is, you know, is grounded in sort of like ethic, ethical, biodynamic sort of thing. (UK5)

However, credible stories can also be delivered through—and may be more valued from (Aqueveque 2015)—genuine intermediaries such as independent shop merchants. While several highlighted the key role of the independent wine shop in offering a more diverse range of choices than the typical supermarket, they also highlighted the trust they placed in the shop and the merchant to offer them good choices and recommendations:

*The owner of the shop has been everywhere. ...He doesn't just choose blind, he's **been there**. He's **tasted it**. He tends to be really good friends with the people that he's met and retained friendship. And he will give you a real view of how everything's been made. I think it's nice, from my perspective, to think that __ has been there. And that he's happy with the surroundings, with the people, that he's buying from. And the quality. (UK4)*

This assessment stood in sharp contrast to some of the expressions of scepticism in relation to wine marketing, as captured in the responses to the elicitation prompts, above.

Summary and implications

South African wines enjoy positive associations with good quality and good value for money for the pilot respondents, who represent a niche of high involvement consumers of South African wines. The consumer and merchant responses to the elicitation prompts highlighted several effective quality cues, including renderings of a wine brand's collective and caring ethos, references to family and the personal background of wine production, and evidence of honesty, integrity, sincerity and simplicity. In contrast, prompts elicited negative reactions when regarded as marketing 'waffle' or 'bullshit,' and specialist terminology and certifications ran the risk of therefore being seen with scepticism as 'merely' marketing. Consumer interest in ethical labour practices and Black Lives Matter protests, and in family and authenticity all suggest opportunities for generating ethical value through farmworker stories.

Phase 5 Findings: UK Wine Merchant Perspective

Phase 5 centred on an exploratory interview with a semi-retired UK independent wine merchant (see Appendix 4). Such expert intermediaries are highly influential in shaping perceptions of high involvement consumers, and operate as gatekeepers, filtering what wines make it to market and framing how they are encountered.

The respondent is a 3rd generation wine merchant. His business is now over 100 years old, in a market town in the Midlands. The shop stocks about 20 South African wines, many of which he has listed, and personally consumed for years. He drinks South African wine monthly or more frequently (the most frequent of any country of origin, in his response to the demographic questionnaire) and has been 'in love' with South African wines since the 1990s. He has visited the Cape Winelands many times and taken customers on wine tours there (some of whom are respondents in Phase 4).

The interview provided a complement to the high involvement consumer views on the elicitation prompts (as reported above), including a positive valuation of simple, authentic statements of collective ethos, and a negative response to messages regarded as pretentious 'marketing-speak.' Relatedly, the respondent echoed past research findings on scepticism towards eco-labels and Fair Trade certifications (Annunziata et al 2011; Capitello & Sirieix 2019), preferring to rely on his own vetting of producers rather than formal certifications. To that end, he was confident that his consumers trusted him to choose the wines:

I'm slightly arrogant in that I believe that when we take it on board our customers will say, yeah, okay. They may have their own opinions beforehand, but they know what I think. It goes back to dependability, you know, and it's the organic bit, the whole thing and many people know my ethos of trading with people.

One further theme was of particular relevance to the pilot project, illustrated below with exemplar extracts:

- Gatekeeper criteria (taste, integrity, ethics).

Gatekeeper criteria

In recounting how he came to list the South African wines in his store, the respondent highlighted several key criteria. The first is taste:

Tasted the wine. That was in the summer '93. I thought, 'I like these wines. They're young but I really like these wines. I don't understand why. Why do I like these wines? I don't know.' They just got me here [gestures to heart]. 'I have to go and meet these people!' So, I thought the time is right, I'm ahead of the game, let's go out to South Africa, haven't been for years because previously I'd gone as a guest, so that's when I went out in '94 and met ___ and ___ and a number of other people, I set up my own meetings.

While taste is an essential first criteria, it is not sufficient for a wine to earn its place in the respondent's esteem (and store). Rather, there were several intangible qualities related to integrity and honesty:

We used to see quite a lot of that happening in South Africa, it's still there but now most of it is quite honest. Where I think they're beginning to go wrong is just too much.... [Interviewer: What do we mean by honest wine and can you recognise it in blind tasting alone or do you need to know the story of it?] I can feel it. I'm not a very good taster technically. I'm quite good commercially. [...] I can just feel it, you know, it just feels right. Now, I can get the technicalities of it mostly, you know, oh, that's nice up there, oh, that's come together there, la de da de da and that I like but you need to just, when you pick it up, you don't need to look at the bottle, you can almost smell it. You just think, oh, that's like a nice honest wine.

Wines with integrity and honesty are contrasted with commercial wines, which are not 'bad' in and of themselves, but lack 'style' and 'individuality':

That is really important to me, the mouth feel, the structure and then having got that far, okay, let's learn a bit more about it. I can usually tell if something is commercial. Commercial's not bad, but if it's commercial and I've got to sell it for £15, that's not on. If it's commercial and I could perhaps do a deal at £7 on occasion, I'd rather sell it for £8 but, you know, I can knock you down now and again, that's fine. You know, it's down your neck job. [...] If I can find something at £8.95 that's got a bit of style, a bit of individuality, everybody's happy and that's how I've lived it.

Finally, 'honest' wines also have an ethical context of production, with a link drawn between honest winemakers and honest wines:

I'm now also very strong on how they run the business. The whole ethics of it all, as well as the way they make their wines, their viniculture and their viticulture and so forth, that's important but it's really important as the sort of people they are, their honesty, their discretion. There again...when a wine has soul you normally find that the people who are doing it are much the same. I don't care whether they're one or two people or whether they've got 1,000 employees. ... It doesn't have to be small scale for it to be honest.

An ethical approach to production extended from the care of the vines and the wines to the care of the people:

Now, of course I didn't go back [to South Africa] for years and years and then when you do go back and you go to ___ and you find their staff has been with them ten, 20 years, 30 years, or you go to ___ and [...] when I stayed with them, ... we go in to the house and ___ says 'Do come and meet ___' or whoever she is and we walk through in to the kitchen area and there is this [old woman]. She said 'This woman runs our house, if she wasn't here the house wouldn't work,' and she did it in front of her, you know. So that was a respect and I learnt how the ___ family had built the school, they added some houses, they employed the teacher and they came from all around. [...] So all of these visits, all of these things have shown me that you've got to have all levels, and it is inevitable as people improve themselves and are creditable[...] So I've found the change in South Africa inevitable. Generally I've found it positive.

Summary and implications

The merchant interview reinforced the UK consumer responses to elicitation prompts. In addition, the respondent provided some insight into how compelling, credible provenance stories generate value, by satisfying selection criteria used by gatekeepers in selecting what wines to bring to market, reaffirming past research that underlines the importance of provenance stories in how gatekeepers 'filter' which wines make it to market (Smith Maguire 2013).

Conclusion

A review of key findings and implications in relation to each research objective provides a useful summary and conclusion.

Objective 1: how is ethical value communicated to wine consumers?

- *What are the recurrent framings of ethical value in winery websites?*

Provenance was the dominant framing of ethical value for all four country of origin websites, and family was the dominant anchor for representations of provenance. Provenance and family are powerful conventions with regard to communicating ethical value and brand credibility to consumers. Brands might consider how to (more) effectively communicate justice and sustainability *through* provenance stories.

- *How do farmworkers and farm work feature—if at all—in these representations?*

While scarce overall, representations of farmworkers and farm work were present in 40% (12 of the 30) of the South African wineries in the sample. Representations of farmworkers and farm work convey a range of ethical attributes, most notably provenance (hand-crafted wines with a face and a family), and demonstrate that other ethical dimensions (justice, sustainability) can be coherently communicated at the same time.

- *How do South African wineries compare to their price-point peers from other New and Old World producing countries, in terms of how they frame ethical value dimensions?*

South African wineries have greater representational diversity in terms of framing ethical value, and are distinctive in terms of the representation of farmworkers by more wineries in their marketing communications than is seen for other producing countries, at least in the context of the sample analysed for the pilot.

These findings suggest a strategic opportunity to include farmworkers to a greater extent in winery brand stories, particularly if focused on provenance and family.

Objective 2: what role does heritage play in wine owners' understandings of a wine's value proposition?

- *What role does personal heritage play?*

For the interviewed wine brand CEO, personal and family heritage were primary to the wine brand story. Family heritage (in the case of the winemaker/CEO but potentially also for farmworkers) can supplant (if not complement) place heritage to generate a credible provenance story.

- *What role does the heritage of place play?*

Even in the context of a relatively new farm and wine brand, place-based heritage was discerned in terms of importance attached to ownership of land and the tangible outcomes of developing the land, planting vines, reaping a harvest, and so forth. The experiences of place were converted into meaningful memories and thus heritage through a process of grafting, such as through the practices of developing and caring for the vineyard, through symbols and stories (including family heritage stories), and through rituals (e.g. harvest

celebrations to cement attachment to place; cooking family recipes in the new house to make it home).

Objective 3: what are the features of farmworkers' heritage stories?

- *What was it like growing up on the farm?*

Respondents shared many happy memories of life on the farm. The nostalgic stories of growing up and working on the farm hold potential for ethical value creation, furnishing tangible and authentic anchors for provenance stories (people, places, rituals) that could significantly extend and enhance a wine farm's heritage stories.

- *What aspects of the farm or farm life make it unique or meaningful?*

Respondents drew attention to the bond shared by those on the farm, and the feelings of belonging, safety and mutual support they associated with the farm family, into which newcomers could be adopted and accepted. This is a more inclusive understanding of family (and its capacity to welcome new members) than is perhaps typically deployed in winery marketing communication representations of 'family' wineries.

- *What connection do farmworkers feel to the final, end product: the wine?*

Pride in acquired expertise in pruning, and the hands-on labour of tending to the vineyards were potential routes through which farmworkers could see their efforts in the final product. This emphasises aspects of wine production that are typically absent in winery marketing communications (as found in Phase 1), in which idyllic vineyards are devoid of people and references to hand-crafted, hand-picked and so forth are made without representations of the material labour that underpins these attributes.

Objective 4: how are South African wines and wine farmworker heritage perceived by UK high involvement wine consumers?

- *What associations do consumers hold for South African wine generally?*

The sample of consumers had positive associations for South African wine, particularly in relation to 'good quality' and 'value for money.' They were, on the whole, a very niche sample of high involvement South African wine drinkers.

- *How do consumers respond to different forms of ethical value appeals?*

The 'reception test' of the different elicitation prompts emphasized several quality cues, including the producer's ethos (collective, caring), family and biographical specificity, and evaluations of honesty, integrity, sincerity and simplicity. The responses also strongly emphasized the quality cue of authenticity, particularly through negative comments about marketing 'waffle.'

- *Are consumers interested in hearing/seeing more about farmworker heritage?*

The respondents were interested, and their responses highlighted potential points of attachment between farmworker heritage and consumers' interests in ethical labour practices (e.g. a high profile exposé of sweatshop labour during the pandemic) and racism and inclusion (e.g. Black Lives Matter protests during the same period), and in family and authenticity.

Objective 5: how are ethical value claims and wine farmworker heritage perceived by a UK wine intermediary?

- *What attributes do intermediaries look for in South African wineries to list (i.e. in their gatekeeping role)?*

The interview responses highlighted criteria that a wine market gatekeeper uses in assessing wines as potential products to bring to market. While taste was fundamental, it was not sufficient; in addition, the respondent said he looked for integrity and honesty, expressed through the taste in the glass, but also the personal interaction between producer and intermediary, the producer's ethos, and marketing communications (as evidenced through the 'reception test').

- *How do they respond to different forms of ethical value appeals?*

See above; the merchant's responses are reflected in the summary of the consumer responses.

Farmworker heritage as a source of ethical value

Synthesizing the various findings, the pilot study suggests that farmworker heritage stories offer a number of dimensions of ethical value and routes to ethical value creation. While the focus of the pilot has been on value creation for the wine brand in an export market, the focus group respondents' comments also suggested the potential to generate forms of ethical value, such as affirming community and individual identity and social cohesion.

From the perspective of the co-production of ethical brand value, wine farmworkers have the potential to be powerful frontline storytellers of evidence-led, credible, authentic provenance stories, in terms of key value dimensions underscored by the research:

- Family (e.g. the positive connotations of the farm family as a supportive, safe, welcoming community);
- Heritage (e.g. intangible cultural heritage of pruning expertise, learned through the passing on of skills; personal heritage and nostalgia);
- Authenticity (e.g. evinced through stories of growing up on the farm; distance from the forms of marketing that attract scepticism);
- Tangibility and credibility (e.g. concrete, material labour, places, people);
- Justice (e.g. evidencing positive outcomes of social upliftment initiatives);
- Sustainability (e.g. frontline farm work involved in protecting biodiversity through hand-picking or hand-tilling);
- Provenance (e.g. biographical specificity of vineyard production; physical and symbolic proximity of farm work to the soil and terroir).

The above points to rich potential for further, future research.

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Appendix 1 Data Collection and Sources

Pilot component	Details of Data Collection	Summary of Data
Phase 1: Consumer-facing marketing representations	<p>Analysis of home page and 'about us' webpages for a sample of 60 wineries (30 South African, 10 French, 10 Italian, 10 Australian).</p> <ul style="list-style-type: none"> • Research conducted by Nikita Bridgeman • Purposive sample: wines readily available to UK high-involvement consumers at three price points (<£10; £10-20; >£20) • Wines selected based on an audit of 18 independent wine shops • Details, see Appendix 2 	<ul style="list-style-type: none"> • Coding of 120 webpages (sample of 60 wineries' home page and 'about us' pages) • Codebook for text and images related to: <ul style="list-style-type: none"> ○ Justice (e.g. Fairtrade, wages) ○ Sustainability (e.g. organic, biodynamic, biodiversity, water, fertilizer, etc.) ○ Provenance (who, what, why, how, terroir) ○ Farm work/workers ○ Certification Logos Used ○ Descriptive language from 'About Us'
Phase 2: Producer perspectives	<p>One semi-structured, one-to-one interview with winemaker/wine producer</p> <ul style="list-style-type: none"> • June 29, 2020; approximately 60 minutes • Conducted by Jennifer Smith Maguire • Details, see Appendix 3 	<ul style="list-style-type: none"> • Transcript, winemaker/producer interview (Owner): 8,350 words
Phase 3: Farmworker perspectives	<p>Two focus groups with farmworkers</p> <ul style="list-style-type: none"> • July 1 and 4, 2020; approximately 90 minutes each • Details, see Appendix 3 • Facilitated by Sharron Marco-Thyse; assisted by Charles Erasmus; observation (via Zoom) by Jennifer Smith Maguire <p>One semi-structured, one-to-one interview with farmworker (participant from one of the focus groups)</p> <ul style="list-style-type: none"> • July 15, 2020; approximately 60 minutes 	<ul style="list-style-type: none"> • Transcript, focus group 1 (FG1): 11,362 words • Field notes, focus group 1 (FG1 notes): 1,608 words • Transcript, focus group 2 (FG2): 8,696 words • Field notes, focus group 2 (FG2, notes): 1,582 words • Transcript, farmworker interview (Farmworker): 8,197 words

	<ul style="list-style-type: none"> Conducted by Jennifer Smith Maguire 	
Phase 4: UK High Involvement Consumer perspectives	<p>Six semi-structured, one-to-one interviews with UK high involvement consumers</p> <ul style="list-style-type: none"> July, 2020; approximately 60 minutes each Details, see Appendix 4 Conducted by Nikita Bridgeman 	<p>Transcripts, consumer interviews (UK1 – UK6 with pseudonyms; see Appendix 4):</p> <ul style="list-style-type: none"> Total 18,107 words; average 3,018 words per interview
Phase 5: UK intermediary perspectives	<p>One semi-structured, one-to-one interview with UK independent wine merchant</p> <ul style="list-style-type: none"> July, 2020; approximately 140 minutes Details, see Appendix 4 Conducted by Jennifer Smith Maguire 	<p>Transcript, merchant interview (Merchant):</p> <ul style="list-style-type: none"> 15,241 words

Appendix 2 Winery Sample Selection

To identify a sample of wines available to the high-involvement consumer, we audited 18 top-ranked independent UK wine shops/retailers (according to Decanter, 2020 and the local university environs), and purposively selecting a sample reflecting availability in multiple shops and for three price points.

Store List (based on Decanter, 2020 and local university environs):

BI Wine	Lockett Bros	Tanners Wines
Buon Vino	Museum Wines	The Good Wine Shop
Cambridge Wine Merchants	Noble Grape	The Wine Society
Handford Wines	Noble Green Wines	Tivoli Wines
Hedonism Wines	Starmore Boss	Wanderlust Wine
Hennings Wine	Stone, Vine, & Sun	Wine Therapy

Winery Sample

Price Point	Country of Origin			
	South Africa n=30	France n=10	Italy n=10	Australia n=10
<£10	<ul style="list-style-type: none"> • False Bay; • Franschhoek Cellar; • Stellar Organics; • Simonsig; • African Pride Wines (Footprint); • Robertson; • Rouxvale; • Zorgvilet; • Koopmanskloof; • Leopards Leap 	<ul style="list-style-type: none"> • Guy Allion; • Plaimont; • Mas de Daumas Gassac 	<ul style="list-style-type: none"> • Araldica; • Cielo e Terra; • Feudi di Guagnano 	<ul style="list-style-type: none"> • Kingston Estate; • Trentham Estate; • Wild and Wilder Wines
£10-£20	<ul style="list-style-type: none"> • Waterkloof; • Vondeling; • Vergelegen; • Delaire Graff; • Painted Wolf; • Iona; • Radford Dale; • Neethlingshof Estate Wine; • Rustenberg; • Journey's End Vineyards 	<ul style="list-style-type: none"> • Chateau Bellegrave; • E. Guigal; • Domaine des Roches Neuves; • Maison D'Alliance 	<ul style="list-style-type: none"> • Masi; • Botter; • Azienda Agricola Cinzia Bergaglio; • Fattoria Selvapiana 	<ul style="list-style-type: none"> • Bird in Hand; • McHenry Hohnen; • D'Arenberg; • Shaw + Smith
>£20	<ul style="list-style-type: none"> • Luddite; • Meerlust; 	<ul style="list-style-type: none"> • Savary; • Domaine Alain Gras; 	<ul style="list-style-type: none"> • Frescobaldi Toscana; 	<ul style="list-style-type: none"> • Si Vintners; • Eden Road Wines;

	<ul style="list-style-type: none"> • Hamilton Russel Vineyards; • Cederberg; • Black Elephant Vintners; • Aristea; • Boekenhoutskloof; • Backsberg; • Stellenrust; • Chamonix 	<ul style="list-style-type: none"> • Chateau de Beaucastel 	<ul style="list-style-type: none"> • Conterno Fantino Azienda Agricola; • Cos 	<ul style="list-style-type: none"> • Tahbilk
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Appendix 3 Farmworker and Producer Sample

Participant ¹	M/F	Notes ²
Owner	F	CEO of wine brand
FG1 – 1	F	<ul style="list-style-type: none"> • Average age: 37 years • All born, raised and have worked on farms • All currently working either in a winery (vineyard, restaurant, wine tasting)
FG1 – 2	F	
FG1 – 3	F	
FG1 – 4	F	
FG1 – 5	F	
FG2 – 1	F	<ul style="list-style-type: none"> • Average age: 52 years • All born, raised and have worked on farms • All currently working on farms or vineyards, including some producing under own winery label
FG2 – 2	M	
FG2 – 3	F	
FG2 – 4	F	
Farmworker	F	One-to-one interview with one of the focus-group respondents to offer additional detail

¹ Designation: One-to-one interview respondents: Owner; Farmworker. Focus Group (FG) 1 and 2, respondents 1-5 (FG1); 1-4 (FG2)

² For the purposes of anonymity, respondent details are aggregated.

Appendix 4 UK Consumer and Merchant Sample

Participant	Age, M/F, Ethn.	Occupation	Education	Average spend ³	Frequency wine consumption ⁴	Frequency consuming South African wines ⁵	Frequency purchasing at independent wine shop ⁶
UK1	69, M, white	Business owner (retired)	Bachelor's degree	£9-£10.99	4-7 times per week	Monthly	Weekly
UK2	64, M, white	Managing director (retired)	Bachelor's degree	£15-£19.99	4-7 times per week	Weekly	Monthly
UK3	64, M, white	Company director (retired)	PhD	£11-£14.99	1-3 times per week	6+ times per year	Monthly
UK4	59, F, white	Key account manager	College	£7-£8.99	4-7 times per week	Monthly	Weekly
UK5	41, M, BAME	HR professional	Master's degree	£15-£19.99	1-3 times per week	Monthly	Weekly
UK6	64, M, white	Company director (retired)	Bachelor's degree	£11-£14.99; £15-£19.99	1-3 times per week	Monthly	Monthly
UK Merchant	73, M, white	Wine merchant	WSET Dip	£7-£8.99	4-7 times per week	6+ times per year	Weekly

³ Categories were: <£5; £5-£6.99; £7-£8.99; £9-£10.99; £11-£14.99; £15-£19.99; £20-£29.99; £30+ (specifically for still wine only)

⁴ Categories were: 4-7 times per week; 1-3 times per week; 2-4 times per month; once or less per month

⁵ Categories were: rarely/never; 6+ times per year; monthly; weekly; 2+ times per week

⁶ Categories were: supermarket; independent wine store; online; wine club/society; restaurant/bar; other. In all cases, independent wine store was single or joint most frequent purchase site.

