Innovation Opportunities and Digital Storytelling:
An Exploratory Study of the Midlands and North Wine Region

Report of Findings

Professor Jennifer Smith Maguire
Dr John Dunning
Ms Samantha McCormick
Mr Piotr Hipsz

July 2021

Sheffield Hallam University
Knowledge Applied

CHEFS | Culture, Health, Environment, Food and Society Research Cluster

Contents

List of tables and figures	
Acknowledgements	1
Image and icon credits	
Executive Summary	2
1 Project background, aims and objectives	5
1.1 Project background	5
1.2 Project aims, objectives and design	6
2 Insights from existing research	7
2.1 Storytelling and value creation	7
2.2 Provenance stories and regional stories	8
Provenance stories	9
Regional stories	9
2.3 Midlands and North wine and tourism consumer insights	11
Wine drinking behaviours	11
Wine buying behaviours	12
Regional tourism behaviours	14
3 Research findings: Midlands and North digital development	16
3.1 Digital marketing audit	16
Digital is business as usual	16
Online sales	17
3.2 The pandemic: stimulus for innovation	18
3.3 Digital innovation and development	19
4 Research findings: Midlands and North regional identity	22
4.1 Cross-regional themes in external-facing stories	22
Family	22
Provenance	23
Provenance sub-themes: climate, history, sustainability	24
Diversity	25
4.2 Internal perceptions of the Midlands and North	26
Confidence	26
Cooperation	27
Difference	28
5 Identifying innovation opportunities	30
5.1 Next steps	31
Appendix A: Research design	32
References	35

List of tables and figures

Tables	
Table 1: Summary of project objectives and methods	6
Table 2: Evidence for storytelling as a tool of value creation	8
Table 3: Frequency of drinking wine	11
Table 4: Impact of Covid 19 on drinking wine	12
Table 5: Buying factors for wine	12
Table 6: Spending on wine for oneself	13
Table 7: Spending on wine for a gift	14
Table 8: Likely domestic holiday destination	15
Table 9: The pandemic and story innovation	19
Table 10: New and increased uses of digital engagement	20
Table 11: Areas for further digital development and support	20
Table 12: Overall grape variety diversity for English and Welsh wine	26
Table 13: Regional confidence	27
Table 14: Regional distribution of English/Welsh winemaking	29

Figures	
Figure 1: Different regional story genres	10
Figure 2: Digital marketing audit examples	16
Figure 3: Prevalence of use of different digital marketing platforms	17
Figure 4: Prevalence of online sales	18
Figure 5: Family theme exemplars	23
Figure 6: Provenance theme exemplars	24
Figure 7: Regional varietal diversity	25
Figure 8: Producer perceptions of the region	28

Acknowledgements

The authors would like to gratefully acknowledge the research participants' generous contributions of time and insights.

This research was made possible through funding from:

- Sheffield Hallam University Social and Economic Research Institute 'Connecting with Professional Practice Project Fund', 2020/21;
- Sheffield Business School Department of Service Sector Management Fieldwork Fund, 2020/21;
- European Regional Development Fund/Sheffield Innovation Programme; 2021.

Image and icon credits

Wine stain image by Please Don't sell My Artwork AS IS from Pixabay
Conversation icon by srip from Flaticon
Magnifying glass image by JJuni from Pixabay
Web and social media icons by Freepik from Flaticon
Tick box icons by Pixel perfect from Flaticon
CHEFS logo by Jason Ruffell
Infographics by Samantha McCormick

Executive Summary

This report discusses findings from an exploratory study of digital storytelling in the context of the Midlands and North wine region of the UK.

Section 1 introduces the context to the project: the importance of storytelling and storytellers for small-scale wineries, and the ways in which the Coronavirus pandemic has fundamentally disrupted small-scale wineries' typical marketing practices, routes to market, and approaches to engaging with their consumers. These conditions form the background to the project aims, which are to:

- scope the current state of play of Midlands and North regional wineries' digital marketing tools and content;
- identify innovation opportunities through digital storytelling.

To deliver on these aims, a mixed method, cross-sectional study was conducted via desk research, a qualitative content analysis 'audit' of regional wineries' digital marketing content, and an online survey and semi-structured interviews with winery representatives.

Section 2 reviews insights from existing research on three fronts:

- Storytelling across a range of market actors (wineries, hospitality staff, retailers, etc.) generates value for small-scale wines through generating positive associations, differentiation and trust in the minds of consumers, in turn leading to greater engagement with the wine, intention to buy/visit, and willingness to pay.
- Two scales of stories are important for small-scale wines: evidence-led, credible, tangible, authentic provenance stories add value at the level of the individual winery; 'umbrella' regional brand stories add value for the regional winery constituents. While there are different genres of regional wine stories, the properties of Midlands and North wineries offer potential for a 'local, regional destination' story, focused on offering an attractive, accessible regional tourism destination with local, authentic wines that offer a point of difference from 'supermarket wines.'
- The Midlands and North wine consumer *in the supermarket* does not differ markedly from the national average with regard to the frequency of wine consumption, importance of taste and price as key purchase drivers, and modal responses for price paid for wine for oneself (£6-6.99) and as a gift (£10-11.99). However, if the Midlands and North is positioned as a 'local, regional destination', then supermarket purchasing behaviour and price comparisons are unlikely to be relevant. Market research further underscores the potential for a 'local, regional destination' story: for example, an increased interest in domestic 'staycations,' and rural/countryside holidays, and a higher-than-national-average preference among Midlands/North consumers for domestic tourism in the Midlands and North.

Sections 3 and 4 report on the findings from the primary research. Section 3 focuses on the digital marketing audit, reviewing main digital platforms (e.g. 84% of the audit sample have a webpage; 70% have Facebook, 51% have Twitter, and 51% have Instagram, with 35% of wineries using all four platforms), as well as key digital innovations (e.g. online sales, now offered in some form by 75% of the regional wineries, having become increasingly important—if not entirely new—since the start of 2020). Combining insights from the audit, survey and interviews, the section highlights several ways in which the pandemic presented opportunities for digital innovation and development, including:

- new or expanded use of digital tools for consumer engagement (e.g. web and social media; increased provision for, and reliance on, online sales);
- new consumer interests and demands (e.g. outdoor wine tastings, buying local, online purchases);
- availability of new resources to support business development, including time, Covid relief funds and WineGB webinars (which were well-received both for content and for the online delivery that was inclusive of members who found in-person sessions geographically challenging);
- ongoing interest in further digital development and support (e.g. in relation to websites, Facebook, and wine clubs).

Section 4 focuses on identifying common ground for an emergent, credible regional wine story that resonates with the region's winery stakeholders. On the one hand, the section identifies three themes that regional winery's individual external-facing stories have in common:
- family (70% of wineries emphasise the central role of kin, family, community, and volunteers);
- provenance (62% of wineries emphasise artisanal methods, authenticity, and local embeddedness, and this is further echoed in references to the region's challenging climate, the history of the land, and efforts at sustainable winemaking);
- diversity (across the entire sample, stories focus on grape varieties that are marginal or absent in the wider context of English and Welsh wine).

On the other hand, the section identifies points of commonality across internal perceptions of the Midlands and North region, including:
- confidence in the region's future (tempered by concerns about its external visibility and quality reputation; overcoming internal diversity and geographic distribution);
- cooperation (through sharing of knowledge, inter-winery collaborations, and benchmarking against regional peer role models, which potentially dovetails with the family theme in external facing stories);
- difference, both within the region (e.g., winemaker age/generation, winemaking styles) and between the region and the rest of English/Welsh wine, which is concentrated in the South and especially South East (in terms of winery number, scale, density of clusters, and style of winemaking, which potentially dovetails with the diversity theme in external facing stories).

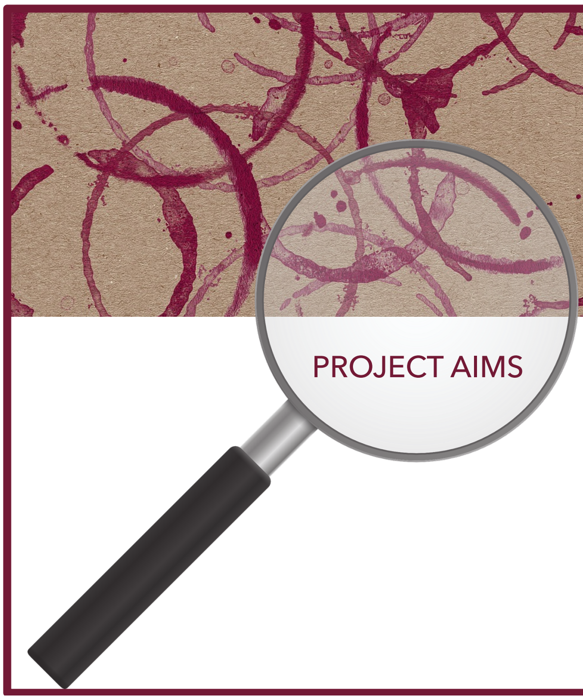
Finally, section 5 reviews key takeaways from the research in light of the project's two overarching aims, posing the question: 'What sort of stories (provenance and regional) are meaningful and credible, for wineries and for consumers?' Looking across the findings, the section notes evidence (albeit based on a small set of respondents to the survey and interviews) that regional wineries are emerging from the pandemic with a strong sense of confidence and an enhanced digital marketing approach, with an awareness of areas for further digital development, and appetite for digital development resources, including the continuation of the well-received WineGB webinars. The section then highlights potential for a 'local, regional destination' type regional story for the Midlands and North, focused on:
- artisanal, authentic wines and wine experiences;
- family, community and connection *with and for* local/regional wine consumers;

- diversity and difference through small-scale producers who work with diverse grape varieties and styles to offer wines to be valued for their difference from what is available on the supermarket shelf, or elsewhere across English and Welsh wine.

Lastly, the report suggests potential next steps for future research in collaboration between regional wineries and CHEFS: the Culture, Health, Environment, Food and Society research cluster of Sheffield Hallam University.

A presentation of initial findings was delivered via a webinar, 14 June 2021. The recording (and feedback form) are available here:
https://blogs.shu.ac.uk/chefscluster/midlands-north-wineries-research/

1 Project background, aims and objectives



- Scope the current state of play of the Midlands and North regional wineries' digital marketing tools and content.
- Identify innovation opportunities for regional wineries through digital storytelling.

This report discusses findings from an exploratory study of digital storytelling in the context of the Midlands and North wine region of the UK.

1.1 Project background

The Midlands and North region of the UK wine industry comprises over 80 small-scale wineries (WineGB 2020). Small-scale wineries typically rely on on-site ('cellar door'/'farm gate') sales, and on local food, beverage and hospitality SMEs for their trade. These routes to market foreground the importance of *storytelling* by a host of actors, including the winemaker, winery representative, restaurateur, sommelier, and independent retailer. It is via their capacity as storytellers that the craft and heritage qualities of small-scale wines are made legible to consumers, and framed as distinctive features that afford some competitive edge in a marketplace crowded with other, often much larger-scale competitors.

The need for a better understanding of storytelling as a form of market intervention is arguably all the more important for wines and wineries that cannot take their routes to market or credibility in the marketplace for granted, as is the case for small and emerging wineries in the Midlands and North region.

In 2020, the Coronavirus pandemic fundamentally disrupted the market relations for small-scale wineries: the shuttering of tasting rooms, bars and restaurants revealed supply chain and marketing communication vulnerabilities. At the same time, the sudden, inescapable pivot to direct to consumer online sales, and the use of digital platforms and virtual tastings and tours suggested potential for lasting innovation and development in wine regions around the world (e.g., Wine Australia 2020a, 2020b).

Therefore, there is a timely need for critical insight into how regional small-scale winery storytelling is delivered, both through established practices and recent digital innovations, and to identify obstacles and opportunities for more effective storytelling and storytellers in light of the lessons learned from CV19.

1.2 Project aims, objectives and design

Aim A: Scope the current state of play of the Midlands and North regional wineries' digital marketing tools and content.
Aim B. Identify innovation opportunities for Midlands and North regional wineries through digital storytelling.

To deliver on these aims, the project objectives were to:

1. Review existing social science research evidence base with regard to the role of storytelling and digital storytelling in value creation;
2. Review existing marketing research insights about Midlands and North wine and tourism consumers;
3. Generate a 'birds eye view' of the current digital marketing tools and content for the region, via an audit of existing digital marketing;
4. Complement the audit with insights from current practices and perceptions of Midlands/North winery representatives.

In doing so, the project utilised a mixed method, cross-sectional design, consisting of desk research, and a qualitative content analysis 'audit' of regional wineries' digital marketing content, supplemented through an online survey and semi-structured interviews. The objectives and methods are summarised in Table 1, and detailed in appendix A.

Table 1: Summary of project objectives and methods

Objectives	Methods
1. Review existing evidence for digital storytelling as a tool of value creation for wineries.	Desk research: narrative literature review of social science and marketing research (n=88)
2. Review existing market knowledge of the Midlands and North wine consumer.	Desk research: analysis of insights from Mintel market reports
3. Identify what tools, platforms and content characterise Midlands and North wineries.	Audit of web and social media for a sample of Midlands and North wineries (n=37)
4. Identify perceptions and practices of Midlands and North wineries.	Survey (n=10) and semi-structured interviews (n=7) with a sample of Midlands and North wineries

A presentation of initial findings was delivered via a webinar, 14 June 2021. The recording (and feedback form) are available here:
https://blogs.shu.ac.uk/chefscluster/midlands-north-wineries-research/

2 Insights from existing research

One of our aims is to identify innovation opportunities, and as such, the project objectives included (Objective 1) reviewing the existing social science research evidence base with regard to the role of storytelling and digital storytelling in value creation, and (Objective 2) reviewing the existing marketing research insights about Midlands/North wine and tourism consumers.

The outcomes of Objective 1 and 2 are reported below, in relation to:
- 2.1 Storytelling and value creation;
- 2.2 Provenance stories and regional wine stories;
- 2.3 Midlands and North wine and tourism consumer insights.

2.1 Storytelling and value creation

Research on wine and wine marketing (and on food/drink, and hospitality and tourism marketing more generally) highlights how important storytelling is for achieving differentiation and generating value.

What do we mean by the term 'storytelling'?

Storytelling is a mode of communication that does more than simply convey factual information. Through its narrative structure and composition, storytelling seeks to transport the listener, engendering an emotional response and shaping the sense making of experiences. As such, storytelling can be a powerful marketing approach to communicating brand values, to building trust and relationships with an audience, and to engaging in a meaningful way with consumers.
- See, for example: Akgün et al 2015; Boldsova 2020; Delgado-Ballester & Fernández-Sabiote 2016; Gilliam & Flaherty 2015; Hartman et al 2019; Lacoste & La Rocca 2015; Moin et al 2020; Moscardo 2020; Pera 2017; Roggeveen et al 2021; Rytkönen et al 2021; Ryu et al 2018.

The phrase *digital storytelling* foregrounds the use of digital platforms and tools (such as the web, social media sites and apps, virtual reality and immersive technologies) to create and share stories. Digital storytelling is increasingly 'business as usual' for marketers.
- See, for example: Bassano et al 2019; Kamboj et al 2018; Kim & Hall 2020; Petit et al 2019; van Laer et al 2019; Vrettakis et al 2019.

We can think of the relationship of storytelling to value generation as a virtuous circle. Stories help to:
- generate *positive associations*, such as with notions of authenticity, heritage, and connections to specific places and locations;
- leading to *differentiation*, separating wines from competitors in the minds of consumers;
- in turn, stories and storytellers build *trust* in, and *legitimacy* for a wine's quality claims and market position;
- thereby increasing *emotional and practical consumer engagement*, *intention* to buy the wine and/or visit the winery, and *willingness to pay* a premium.

These key themes are supported through a range of research, as summarised in Table 2.

Table 2: Evidence for storytelling as a tool of value creation

Dimension of value creation		Supporting research (examples)
Generation of positive associations, such as with:	Authenticity	Ageeva & Foroudi 2019; Pelet et al 2020; Youn & Kim 2017
	Heritage	Sillani et al 2017; Triana 2019
	Location	Cappeliez 2017; Ikäheimo 2021; Rabbiosi 2016
Differentiation from competitors in consumer minds		Bernal-Jurado et al 2021; Cassar et al 2018; Rytkönen et al 2021; Ryu et al 2018
Development of trust in wine and legitimacy for its value claims		Dolan & Goodman 2017; Gilliam & Flaherty 2015; Lacoste & La Rocca 2015; Triana 2019
Increase emotional and practical engagement		Akgün et al 2015; Bianchi & Andrews 2015; Dessart & Pitardi 2019; Moscardo 2020
Increase intention to purchase/visit		Cuomo et al 2016; Escandon-Barbosa & Rialp-Criado 2019; Flavián et al 2019; Moin et al 2020; Spielmann & Mantonakis 2018; Wen & Leung 2021
Increase willingness to pay		Danner et al 2016; Di Vita et al 2019; Eustice et al 2019; Galati et al 2019

Furthermore, the research on storytelling and marketing highlights that wine stories are communicated by and through a vast range of touch points and market actors, including:

- widely circulated, if largely impersonal format of labelling and packaging (Pelet et al 2020; Singer 2018);
- interpersonal communication (which may range from highly scripted to highly spontaneous), such as that which occurs at cellar door visits and wine fairs, in restaurants, pubs and bars, and at retailers (Aqueveque 2015; Boatta et al 2011; Charters & O'Neill 2001; Frost et al 2020; Smith Maguire 2013);
- virtual reality wine tours and other immersive digital stories (Spielmann & Mantonakis 2018; Wen & Leung 2021);
- user generated social media content, originating from both producers and consumers (Dolan & Goodman 2017; Roggeveen et al 2021; van Laer et al 2019).

In short: a wine's story is not told by the winemaker alone!

2.2 Provenance stories and regional stories

Two scales of stories are especially relevant for research on the Midlands and North wine region:

- provenance stories, which are particularly important for small-scale wineries, such as those that characterise the Midlands and North region;
- regional stories, which help to amplify the visibility and legitimacy of individual wineries through a collective promotional presence as a 'wine region.'

Provenance stories

Research underscores the primacy of *evidence-led, credible, authentic provenance stories* for premium wines (Downing & Parrish 2019; Smith Maguire 2018; Warman & Lewis 2019). Provenance stories communicate where a wine was made, when, how, and by whom. Such stories include not only factual information (e.g., the specific vineyard site, grape variety, or date of harvest) but also the emotive and experiential dimensions of provenance (such as a winemaker's ethos and commitment to the soil; the turbulent challenges of an early frost; the biographical journey that led to founding a vineyard or making wine).

Provenance stories are especially crucial for differentiation and value creation for small-scale wines. The two primary drivers of consumers' wine purchase decisions are taste and the price (Mintel 2020b). Small-scale wines and wineries face challenges on both fronts:

- It is difficult, if not impossible (even for experts) to detect the hallmarks of small-scale, hand-crafted viticulture in the *taste* of what is in the glass;
- The *price* of small-scale wines often demands justification when juxtaposed with supermarket shelf competitors.

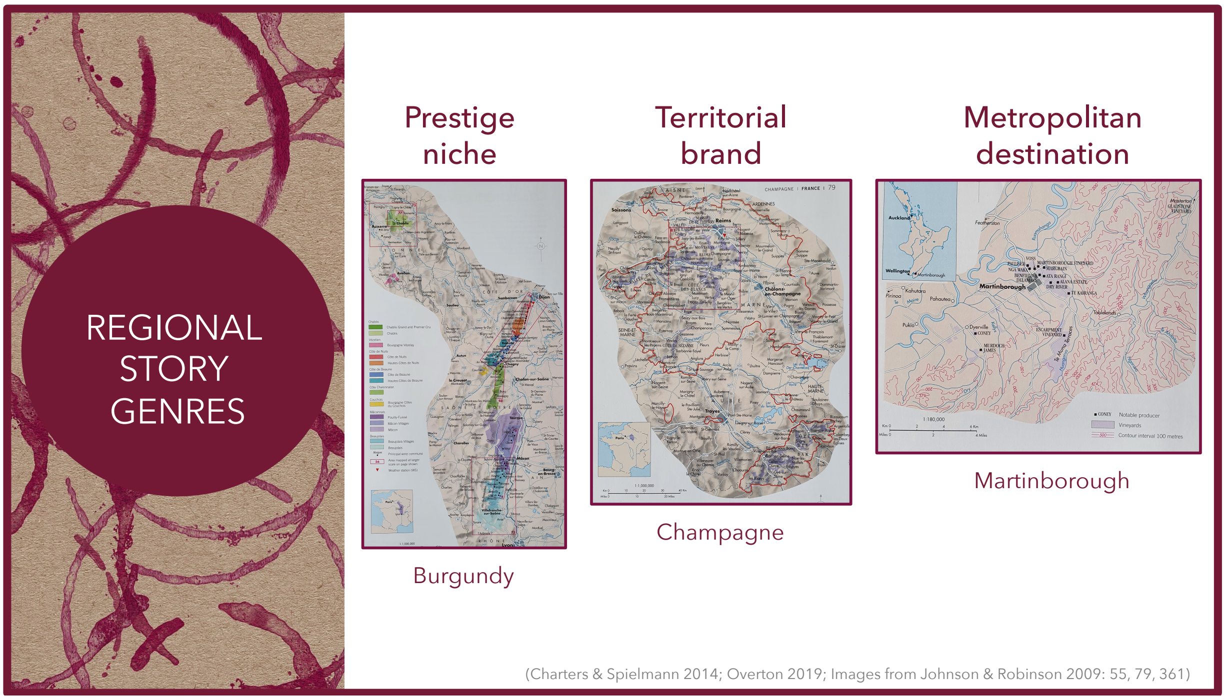
In both cases, stories are a crucial tool for bringing consumers on board. Stories make the artisanal qualities of small-scale wines tangible, legible, and credible for consumers in ways that complement and enhance the taste of what is in the glass. In turn, these stories provide crucial context to justify any associated price premiums. Small-scale wines are thus not just wines, but wines with a story.

Recurrent anchors for effective provenance stories have been identified across a range of research, including forms of biographical specificity ('wines with a face'), heritage and tradition, and geographic specificity and *terroir* (Ballantyne et al 2019; Downing & Parrish 2019; Spielmann et al 2014; Triana 2019). Another key anchor for such stories are notions of family, which are found to contribute to family firms' competitiveness and sales by enhancing consumers' perceptions of a firm's commitment, trustworthiness, and authenticity (Zanon et al 2019), and can drive sales (Andreini et al 2020; Binz Astrachan et al 2018). 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). The importance of provenance stories anchored by family- and family-ness is found in wine markets around the world where family firms are typical, such as Italy (Gallucci et al 2015), the US (Triana 2019) and Canada (Voronov et al 2013).

Regional stories

A regional story can serve as a powerful umbrella for individual wineries, amplifying their promotional visibility and legitimacy, and increasing their capacity to draw visitors. There are many different types of wine regions, and regional wine stories evident in the world of wine (Johnson & Robinson 2009), three of which are highlighted in figure 1.

Figure 1: Different regional story genres



(Charters & Spielmann 2014; Overton 2019; Images from Johnson & Robinson 2009: 55, 79, 361)

Prestige, niche regional wine stories are exemplified by regions such as Burgundy or Napa Valley. They are small-scale, with claims of quality and uniqueness linked to an emphasis on *terroir*, or specific sites and soils (Demossier 2018). Such regions are 'niche' in terms of the emphasis on discrete parcels of land, and their prestige comes through long-term and sustained development of a quality reputation and mythological status in the marketplace.

Territorial brand wine stories are exemplified by Champagne and Prosecco. Their emphasis is not on site-specific *terroir* or qualities of individual vineyards , but on a clearly defined territory that lays claim to shared and unique qualities or practices (Charters & Spielmann 2014). Producers within that territory can thus draw on the esteem and legitimacy of the territorial identity. Such stories typically overlap with protected designations of origin (e.g. Champagne AOC; Prosecco DOC), and are related to (if geographically much narrower than) country of origin effects, such as are enjoyed by Swiss watches or German cars.

Metropolitan destination wine stories are exemplified by Martinborough, New Zealand, Yarra Valley, Australia, or Long Island, US. Their emphasis is on neither *terroir* nor territory, but on the accessibility of the region as a destination for tourists (Overton 2019). Such regions are typically within a two hour drive of a major city. Urban residents look to their local wine regional destination as an attraction option for a day out, and for sourcing wines that are 'local,' 'authentic', 'artisanal' and a little bit different to what is readily available on their supermarket shelves.

These different regional stories highlight that there is no one type of wine region. Inspired particularly by the 'metropolitan' type regional story (Overton 2019), we note that the Midlands and North region comprises small-scale wineries situated across a geographically vast area, yet each within an easy drive of towns and cities. These small-scale wineries have the capacity to not only produce fine wine, but also wines with compelling stories of locality and authenticity—by virtue of their scale, family or community orientation, and other differences from 'supermarket wines.' As such, there appears to be a potentially good fit between the properties of the Midlands and North—at both scale levels of individual wineries and the region—to develop a coherent umbrella identity as a 'local, regional' wine destination.

2.3 Midlands and North wine and tourism consumer insights

We reviewed market research insights from Mintel in relation to UK consumers' food, drink and domestic tourism preferences, and extracted findings where possible to compare the views, practices and perceptions of the average UK adult consumer, the Midlands/North consumer, and consumers in AB and C1C2 sociodemographic brackets.

Wine drinking behaviours

The UK is a well-established, mature wine market, with 68% of adults drinking wine in the last six months of 2020. This was a slight drop from 2019, which Mintel attributed to the Covid-related lockdown, closures of on-trade venues, and fewer social gatherings (Mintel 2020b). As summarised in Table 3 (source, Mintel 2020b), the Midlands/North consumer is on par with the national average: 20% drink wine 1-2 times per week; 15% drink wine 2-3 times a month. Both the national average and Midlands/North average consumer is less likely to drink wine, and drinks wine less frequently, that consumers in the higher socioeconomic groups (AB).

Table 3: Frequency of drinking wine

FREQUENCY OF DRINKING WINE

	National %	Midlands and North %	AB %	C1C2 %
Not drunk wine in the last six months	32	33	21	31
Drink wine 1-2 times per week	20	20	23	21
Drink wine 2-3 times a month	15	15	19	17

Still, Sparkling and Fortified Wine: Inc Impact of COVID-19 - UK - October 2020. Mintel.
Question: How often have you drunk wine in the last 6 months? (July 2020). Source: Lightspeed/Mintel. Base: 1,958 internet users aged 18+

Respondents were also asked how Covid-19 had impacted on their wine drinking. Responses were broadly similar, as summarised in Table 4 (source, Mintel 2020b), with the majority reporting that their drinking remained unchanged.

Table 4: Impact of Covid 19 on drinking wine

IMPACT OF COVID19 ON DRINKING WINE

	National %	Midlands and North %	AB %	C1C2 %
Drink more	23	23	21	24
Drink the same amount	57	57	60	56
Drink less	19	17	18	19

Still, Sparkling and Fortified Wine: Inc Impact of COVID-19 - UK - October 2020. Mintel.
Question: Have you been drinking more, the same amount or less wine since the COVID-19/coronavirus outbreak? (July 2020). Source: Lightspeed/Mintel. Base: 1,333 internet users aged 18+ who have drunk wine in the last 6 months

Wine buying behaviours

The top two drivers of consumer purchases of wine—both before and during the pandemic—are taste and price (findings that are replicated across social science and marketing research more generally). The Midlands/North consumer differs very little from the national average, while consumers in the AB demographic are less price sensitive; see Table 5 (source, Mintel 2020b).

Table 5: Buying factors for wine

BUYING FACTORS FOR WINE

	National %	Midlands and North %	AB %	C1C2 %
Taste	82	84	83	84
Price	74	74	69	76
Ethical	14	14	14	13
Environmental	13	14	12	12
Healthy	10	9	7	10
Convenience	9	10	9	9
Innovation	9	8	10	8

Still, Sparkling and Fortified Wine: Inc Impact of COVID-19 - UK - October 2020. Mintel.
Question: When choosing between different wine products, which of these factors do you usually prioritise? Please select all that apply. (July 2020). Source: Lightspeed/Mintel. Base: 1,339 internet users aged 18+ who have bought wine in the last 6 months

The pandemic certainly had an impact on buying behaviours (Mintel 2021b). With lockdown and the closure of the hospitality sector, sales shifted from on-trade towards off-trade. Off-trade sales increased by 7%. Supermarkets remained the leading channel for wine purchase, and were almost three times greater than online purchase during 2020 and four times greater than 'on-premise venue' sales (Mintel 2021b). In contrast to supermarkets, specialist food and drink retailers were deemed non-essential businesses in the first lockdown, and had to rely on online sales to maintain business (Mintel 2021b).

To assess willingness to pay and if there was a regional difference in price ceiling, we looked at the three most common price brackets for supermarket wine purchases, both for oneself (Table 6; source Mintel 2020b) and as a gift (Table 7; source Mintel 2020b). Unsurprisingly given the cultural cachet of wine, the average spend on wine as a gift exceeds wines bought for oneself (see also Mintel 2020c). The most common response for spending on oneself was £6-6.99; the most common response for spending on a gift was £10-11.99: these were the top response categories across the national sample, as well as for the Midlands/North aggregate, and both sociodemographic groups.

Table 6: Spending on wine for oneself

SPENDING ON WINE FOR ONESELF (SUPERMARKET)

	National %	Midlands and North %	AB %	C1C2 %
£5-5.99	13	10		14
£6-6.99	15	16	14	18
£7-7.99	14	9	14	15
£10-11.99	13	9	14	

Still, Sparkling and Fortified Wine: Inc Impact of COVID-19 - UK - October 2020. Mintel.
Question: Approximately how much would you be willing to spend on a standard sized bottle of wine (eg 750ml) from a supermarket for yourself? – NET (July 2020). Source: Lightspeed/Mintel. Base: 1,339 internet users aged 18+ who have bought wine in the last 6 months

Table 7: Spending on wine for a gift

SPENDING ON WINE FOR A GIFT (SUPERMARKET)

	National %	Midlands and North %	AB %	C1C2 %
£7-7.99		6		
£8-9.99	9			10
£10-11.99	25	25	26	26
£15-19.99	12	14	13	11
£20-29.99	9	2	11	

Still, Sparkling and Fortified Wine: Inc Impact of COVID-19 - UK - October 2020. Mintel.
Question: Approximately how much would you be willing to spend on a standard sized bottle of wine (eg 750ml) from a supermarket as a gift? – NET (July 2020). Source: Lightspeed/Mintel. Base: 1,339 internet users aged 18+ who have bought wine in the last 6 months

The above suggests that the Midlands/North consumer is quite similar to the national average and gives some sense of the regional price ceiling for wine. However, it is important to bear in mind that the data refer to purchases in the *supermarket*. As per section 2.2 (discussion of regional wine stories, and scope to develop a 'local, regional destination' story), the supermarket may not be neither a relevant nor appropriate context in which to examine how Midlands and North wines are evaluated and valued. They are not sold in the supermarket, and may actually be understood and valued by consumers for their point of difference from supermarket wines, and what they can offer in terms of touristic experience, local bona fides, identity affirmation, authenticity, and so forth. More targeted research would be required to determine the purchase drivers and price sensitivity for Midlands/North wine specifically.

Regional tourism behaviours

Mindful of the potential of the Midlands and North region to serve as a domestic tourism destination for locals (as per section 2.2), we extracted consumer insights relating to regional tourism.

Mintel research shows that 85% of UK adults feel that the pandemic has made them more interested in discovering destinations within the UK and 'closer to home', even after restrictions are lifted (Mintel 2021a). The demand for 'staycations' is expected to surpass pre-covid-19 levels in the immediate term, due to ongoing uncertainty and/or public health risks associated with international travel (Mintel 2021a).

March 2021 research shows that 39% of those planning to holiday in the UK were interested in a countryside/rural holiday, up 11% from the previous year (Mintel 2021a). This is promising for the Midlands and North as the popularity of rural 'staycations' increases, alongside increasing interest in spending time outdoors and in the countryside (Mintel 2020a).

We can also detect a local regional preference for Midlands/North consumers, with higher than national average interest in Scotland, Yorkshire/Humberside, and the North East/North West as holiday destinations. (Summarised in Table 8; source, Mintel 2021a.)

Table 8: Likely domestic holiday destination

Where would you be likely to stay for your holiday(s) in the UK in the next 12 months?

Destination	National %	Midlands and North %	AB %	C1C2 %
South West	29	21	33	29
Scotland	27	33	26	30
Wales	25	26	27	26
South East/East of England	22	15	26	21
Yorkshire & Humberside	18	22	19	19
North East/North West	18	21	18	19
London	16	19	13	16
East Midlands	7	6	6	6
West Midlands	6	6	6	5
Northern Ireland	5	6	4	5

Domestic Tourism: Inc Impact of COVID-19 - UK - December 2020. Mintel.
Question: Where would you be likely to stay for your holiday(s) in the UK in the next 12 months? (July 2020).
Source: Lightspeed/Mintel. Base: 1,087 internet users aged 16+

Additionally, linking the potential for regional tourism and specialist food and drink retailers is the interest in 'local experiences,' with the majority of over-45 year old travellers and tourists making it a priority to support local businesses/produce (Mintel 2020d).

3 Research findings: Midlands and North digital marketing

The project's primary research involved scoping the Midlands and North regional wineries' digital marketing tools and content, perceptions and practices. This generated a 'birds eye view' of the current digital marketing tools (and content, as explored in section 4) for the region, delivered through (Objective 3) an audit of existing digital marketing, and (Objective 4) complemented through insights from regional wineries themselves.

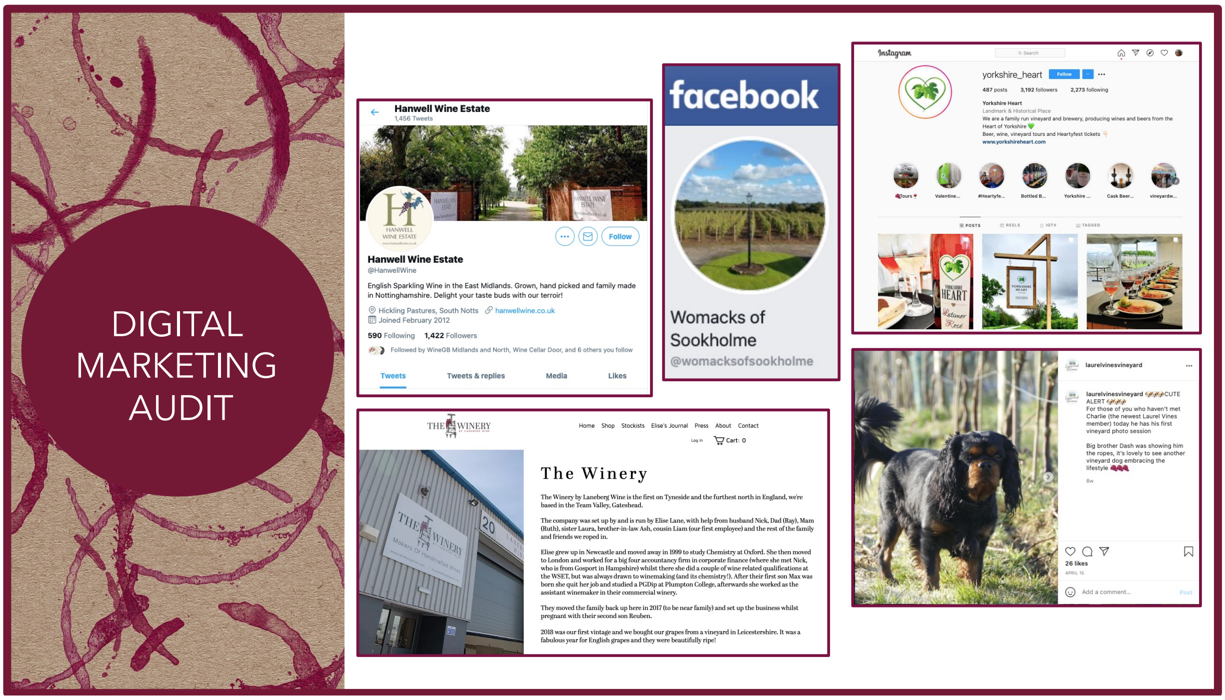
Below, the findings are reported in relation to:

- 3.1 Digital marketing audit
- 3.2 The pandemic as stimulus for innovation
- 3.3 Digital innovation and development

3.1 Digital marketing audit

We examined the digital marketing across the sample (n=37) of Midlands and North regional wineries; this involved data collection across websites, Facebook, Twitter and Instagram, a few examples of which are presented below in Figure 2.

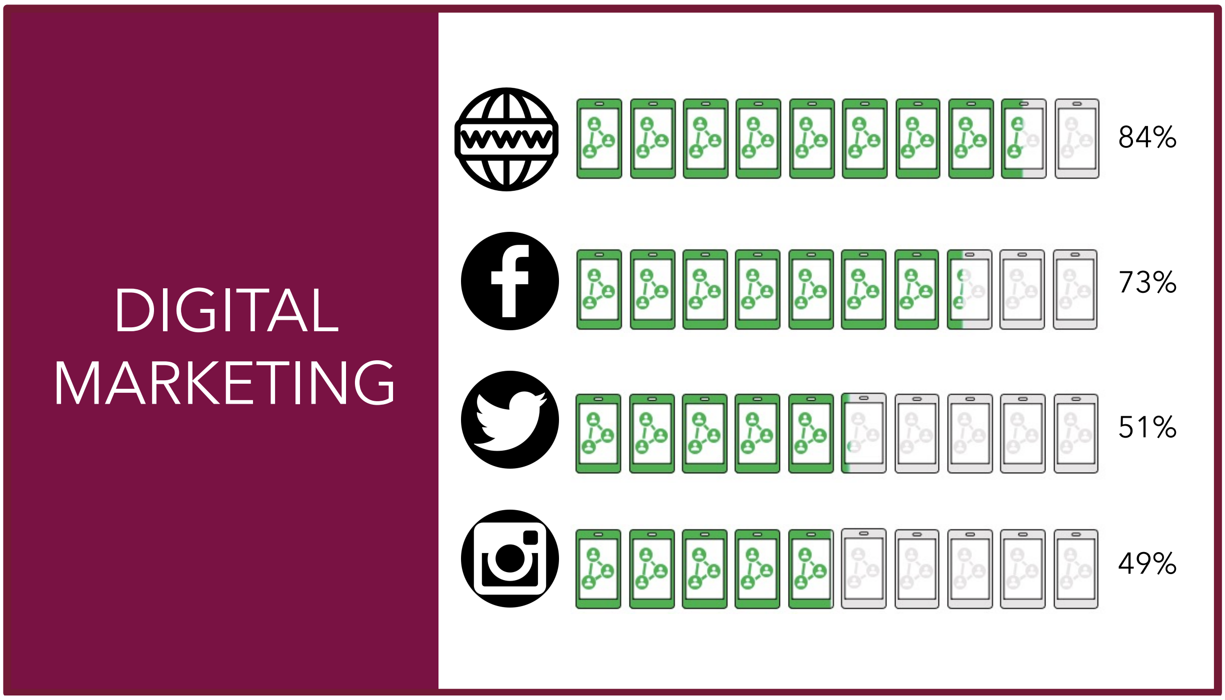
Figure 2: Digital marketing audit examples



Digital is business as usual

Having a digital presence is 'business as usual' for the majority of wineries. Websites were the most common: 84% of the sample had a website (either own domain, or hosted, e.g., by WordPress); 73% had a Facebook account; 51% had a Twitter account; 49% had an Instagram account (see Figure 3). These platforms were used in different combinations, with only 35% of wineries using all four.

Figure 3: Prevalence of use of different digital marketing platforms



However, if the use of these digital platforms (alone and in combination) was business as usual, there were considerable variations in how the digital platforms were used. For example:

- All of the Instagram accounts were actively maintained, whereas 15% of Facebook accounts and 37% of Twitter accounts hadn't been updated since before the pandemic (as of April 2021, when the main phase of the audit was completed).
- 35% of wineries provide information about in-person tours and tastings through their online presence, while 24% offered some form of online tours or tastings.

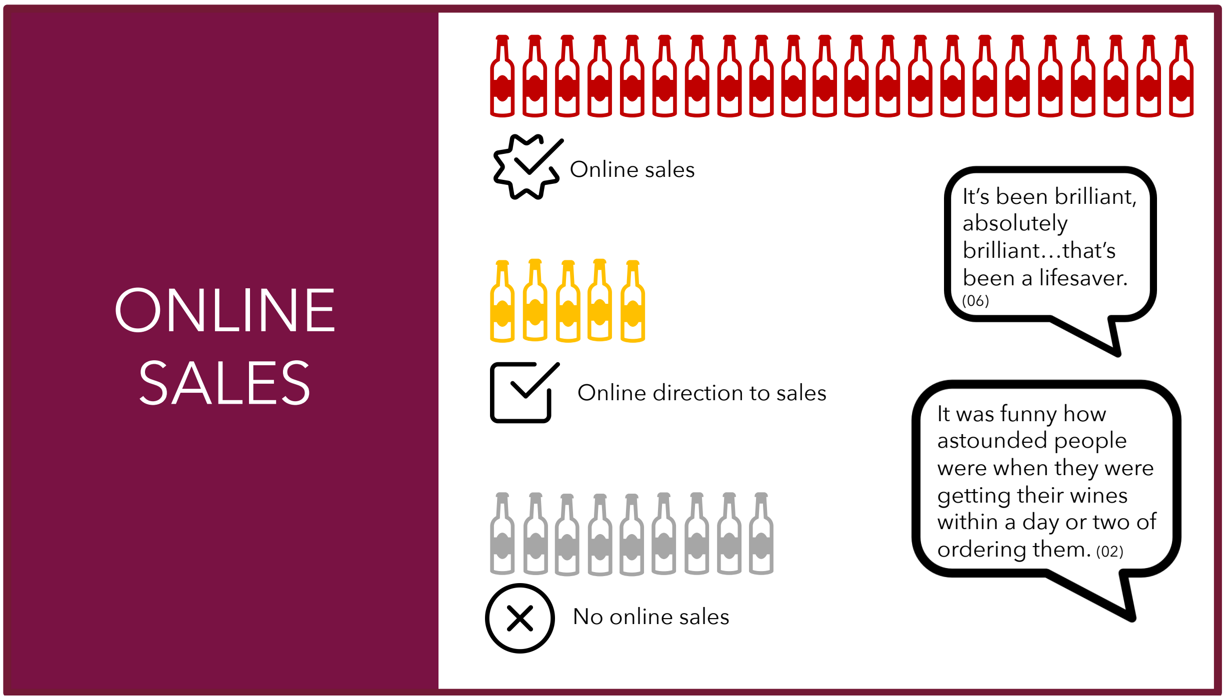
Online sales

Online wine buying was and remains the exception for UK wine consumers (see section 2.3), for whom supermarkets are the dominant point of purchase. Pre-pandemic, online sales were also the exception for UK wine producers, responsible for only 7% of domestic sales in 2019 (WineGB 2020). However, the pandemic has created much more intensive use of online sales to reach customers.

Of the audit sample (n=36, excluding one vineyard not licenced to sell wine), 75% of the wineries offer some form of online sales to consumers through their online presence (webpage or Facebook). The way in which online selling was offered varied (summarised in Figure 4):

- 22 wineries (61%) offer online sales (customers can order, pay online, and elect for delivery or collection);
- 5 offer some online information (e.g. price list and directions to a retailer);
- 9 do not offer any facility for or information about sales.

Figure 4: Prevalence of online sales



The majority of survey respondents indicated that winery online sales had increased since the start of 2020, or were an entirely new undertaking (see Section 3.3, Table 10 below).

In the survey and interviews, online sales emerged as a 'lifesaver,' both for those already selling online, pre-pandemic, and for those for whom online sales were entirely new territory. Comments highlighted the degree to which online sales were closely linked to the pandemic, and how critical online sales were to survival:

- "We had to pivot and sell more wine online to end consumers as the pubs and restaurants were closed." (survey)
- "We built our webshop just in time for the lockdowns, and were able to market more directly to consumer via social media channels." (survey)
- "Luckily we did already have an active social media presence and online shop, but I don't think we were ready for the scale of escalation!" (survey)
- "It's been brilliant, absolutely brilliant…that's been a lifesaver." (interview 06)

Comments also highlighted some unintended advantages to online sales, allowing regional wineries to become local heroes during the lockdown, building new and/or deeper relationships with their customer base:

- "It was funny how astounded people were when they were getting their wines within a day or two of ordering them." (interview 02)

3.2 The pandemic: stimulus for innovation

The survey and interview data reveal multiple ways in which the pandemic—as a sudden and drastic disruption to normal ways of working—served as a stimulus and an opportunity for innovation and development. The development of online sales is noted above. Further examples related to:

- Having time to undertake business development projects (including investing in marketing), thanks to changes in normal routines, including commuting and non-wine careers;
- Accessing other (non-time) resources that were previously unavailable, such as covid relief funds, and business development webinars (see comments on WineGB webinars below, section 3.3), or the additional capacity that marketing consultants had due to the shuttering of their larger hospitality sector clients;
- Leveraging changing consumer interests and practices, for example, greater interest in local outdoor wine tours and tastings, and buying locally:
- Adding to, and telling the winery story in a different way (survey question; see Table 9 below);
- Adapting and adopting new digital tools for consumer engagement, and/or using the same tools to a greater extent (survey question, see Table 10 below).

Table 9: The pandemic and story innovation

Q: Would you say that the pandemic has caused the winery to (tick all that apply):	
Re-evaluate its story	✓
Add to its existing story	✓✓✓✓
Tell new stories	
Tell its story in a different way	✓✓✓✓
Involve new voices in telling its story	

✓ represents one response

3.3 Digital innovation and development

Survey respondents were asked to indicate how their use of a range of customer engagement digital/online tools and strategies had changed since the start of 2020. Some of the tools/strategies had been used less, or no change, or were not used at all. However, the responses below—focusing only on those with increased or entirely new use—highlight a range of areas of development since the start of the pandemic (see Table 10). In particular:

- Winery website, Facebook, Instagram and online sales were most commonly mentioned as those tools/practices that increased (highlighted in yellow below);
- Entirely new digital engagements included online tastings, events, blog, wine club, and local partnerships;
- Some of these areas overlap with winery-identified areas for further professional development, with regard to winery websites, Facebook and wine clubs (see Table 11).

The survey also provided a list of different areas for further digital development, and invited respondents to indicate their interest in up to four; the results are summarised below in Table 11 with the most interest focused on the development of winery use of Facebook, wine clubs and websites. This overlapped with responses to the question of what was the biggest marketing challenge going forward for the winery, which focused on having sufficient time, knowledge and budget to develop winery marketing, to enhance sales, and drive winery visits, and a discussion of TikTok in the 14 June webinar.

Table 10: New and increased uses of digital engagement

Q: Since the start of 2020, has the winery's use of the following decreased, stayed about the same, increased, or was this entirely new in 2020? (Please answer for each)	Increased	Entirely new in 2020
Winery website	✓✓✓✓✓✓	
Winery Facebook page	✓✓✓✓✓	
Winery Twitter account	✓✓✓	
Winery Instagram account	✓✓✓✓✓✓	
Live tastings online		✓✓✓
Other live online events		✓✓✓
Tasting notes	✓	
Regular blog	✓✓✓	✓
Video content	✓✓✓✓	
Online sales with delivery for a charge	✓✓✓✓✓✓	
Online sales with free delivery	✓✓✓✓✓	
Online sales for customer collection	✓✓✓✓	✓✓
Wine club	✓	✓
Customer mailing list	✓✓✓✓	
Local winery partnerships	✓	
Local partnerships (e.g. bundled offers or collaborations with other [non-winery] local or regional businesses)	✓✓✓	✓
Discounting	✓✓✓	

✓ represents one response

Table 11: Areas for further digital development and support

Q: Please indicate up to four areas for which you are interested in further development and support (select up to 4):	
Winery website	✓✓✓✓
Winery Facebook page	✓✓✓✓✓
Winery Instagram account	✓✓
Live online tastings (e.g. on Zoom)	✓✓✓
Tasting notes	✓
Regular blog (at least monthly)	✓✓
Video content (e.g. interviews with wine maker)	✓✓
Online sales with delivery for a charge	✓
Online sales for customer collection	✓
Wine club	✓✓✓✓✓
Customer mailing list	✓✓
Local winery partnerships (e.g. bundled offers or collaborations with other local or regional wineries)	✓
Local partnerships (e.g. bundled offers or collaborations with other [non-winery] local or regional businesses)	✓✓

✓ represents one response

The types of innovations noted above were often supported through resources external to the winery—such as family and friends with social media and marketing skills sets, working with an external consultant or marketing agency, and accessing a range of WineGB webinars.

Comments from the interviews highlighted the positive reception in particular of WineGB's webinars during the pandemic. Comments included:

- "What did happen more recently, was that WineGB had the webinars… and I watched those quite carefully. … Wine GB are brilliant, I think they are particularly informative." (interview 01)
- "Wine GB has woken up to the fact that there's a thing called Zoom and don't expect now people to drive 350 miles, spend two nights in a hotel…in order to attend a one-day course." (interview 04)
- "We've got Wine GB opening up avenues through webinars… and wine skills and all the rest of it, that is opening up those avenues to allow us to make more informed choices." (interview 06)
- "Wine GB's webinars in the last year: I have benefitted…fairly significantly from that." (interview 07)

The webinars were not only well-received as targeted and timely support, but also a welcome change from previous emphasis on in-person engagement with members, which poses challenges for those living at such distances from the concentration of wineries (and wine training opportunities) in the South (South East, West, Wessex, East Anglia, Thames and Chilterns).

4 Research findings: Midlands and North regional identity

In addition to scoping the region's digital marketing tools, Objectives 3 and 4 also examined the content of digital marketing (i.e., how wineries present themselves to external audiences) and winery representatives' perceptions of the region (i.e., how regional stakeholders perceive the region). The analysis cut across wineries' digital stories and winery representatives views, to identify salient, shared characteristics that could potentially serve as common ground for an emergent, credible regional wine story for the Midlands and North.

Below, these characteristics are reported in relation to:
- 4.1 Cross-regional themes in external-facing stories
- 4.2 Internal perceptions of the Midlands and North

4.1 Cross-regional themes as an emerging regional wine story

Three main themes emerged from the qualitative coding of the wineries' digital media:
- Family: kin, friends and community as the heart of regional wineries
- Provenance: an emphasis on small-scale, artisanal, local and authentic winemaking
    - Provenance sub-themes: climate, history and sustainability
- Diversity: regional distinctiveness through grape variety, and differences from larger-scale winemaking in the South.

Family

Family was the most frequently occurring theme that emerged from coding across the websites and social media content, present in 70% of the regional winery sample. As highlighted in Figure 5, this theme derives from references to:
- Kin: an emphasis on family ownership, and family involvement in running vineyards and wineries.
- Friends and community: an emphasis on an expansive winery 'familiness' (Smith Maguire et al 2013) that includes friends and members of the wider community, who play their part in sustaining regional wineries through patronage (e.g. loyal customers, wine clubs, local champions) and through labour (e.g. helping with planting or pruning), and partnering with local businesses and neighbours. For example:
    - "Everything we've done has been done with family help and friends… We would like to be a community vineyard where people…feel they can just walk in, wander around the vineyard, they don't have to feel they have to buy something here." (interview 05)
    - "We're working with our neighbours to support each other." (interview 06)
- Volunteers: several wineries offered means by which consumers could extend their engagement with the winery beyond purchasing wine, such as by adopting a vine, or annual calls for volunteers to pitch in for harvest or crushing, thereby creating routes for consumers to become part of the extended winery family. For example:
    - "I think they all want to participate, it's that if they can touch it and feel it and sense it, the process as well as the product, then they get drawn into that." (interview 01)
    - "During busy times we rope in volunteers, who are so happy to get involved." (interview 02)

   - "We have a following of volunteers that have been year after year to help with the harvest." (interview 07)

The family theme is thus potentially quite expansive and inclusive, extending beyond immediate blood and marital relations to both span friends and the wider community, and recast external others (e.g., consumers) as part of the winery family, and co-producers of the wine.

Figure 5: Family theme exemplars

Provenance

The theme of provenance (i.e., stories of how, where, when and by whom wine is made) was found in 62% of the regional winery sample. As highlighted in Figure 6, this theme derives from references to:

- Artisanal methods: an emphasis on small-scale production, hand-craftedness (e.g., hand picking), biographical specificity (e.g., 'wine with a face'), and/or transparency (e.g., from grape to glass). For example:
   - "It's about where it's made, how it's made and it's that process… That has to be the driving story because…I think it's very difficult to run a wine business 100 percent about provenance of grape." (interview 03)
   - "We do it all by hand ourselves, so it's still very much a labour intensive operation." (interview 05)
   - "Hand on heart, I can say 'I know exactly what's gone into that wine'." (interview 06)
- Authenticity: an emphasis on genuine passion, lived expertise, and care for the wine. For example:
   - "Customers appreciate if you put blood, sweat and tears into it, they appreciate it more." (interview 01)
   - "It's that kind of artisanal, minimal intervention…taking care over your product, and…there's a story behind the person who's doing it." (interview 02)

- "I think you've got to go through some hard harvests. You need the battle scars. Otherwise, I don't think it's authentic. …It gives you more credibility." (interview 03)
- Local: an emphasis on wineries' local roots and local embeddedness. For example:
  - "This is where we're from, it's who we are." (interview 03)
  - "We're producing drinks that are to be drunk by local people in a local place." (interview 05)

Figure 6: Provenance theme exemplars

The provenance theme is typical of fine wine (Smith Maguire 2018). It is a more inclusive framing device than *terroir* and need not be anchored to formal designations of origin (e.g., PDOs), as might be the case for niche wine regions or territorial brands (see section 2. 2). Storytelling—and social media stories in particular, with their frequent glimpses into the 'real life' of the vineyard and wine making (see examples in Figure 6, above)—allow small-scale wineries to make provenance tangible and credible for consumers, offering transparency, authenticity and local embeddedness.

Provenance sub-themes: climate, history, sustainability

Three, less prevalent themes were detected through the qualitative coding of the websites and social media, which have potential to further amplify the provenance theme, as they relate directly to the place and process of wine production. These are climate, history and sustainability.

- Climate (41% of wineries): typical of wine discourse, these was an emphasis in cases on the suitability of a vineyard's location for viticulture; more commonly, however, was an emphasis on the *difficulties* of the climate, which could resonate with biographical dimensions of provenance (e.g., winemaking that requires a gritty, pioneering, determined spirit). For example:
  - "I always lose…about five or ten percent through frost. …It becomes a battle against the elements at times." (interview 01)

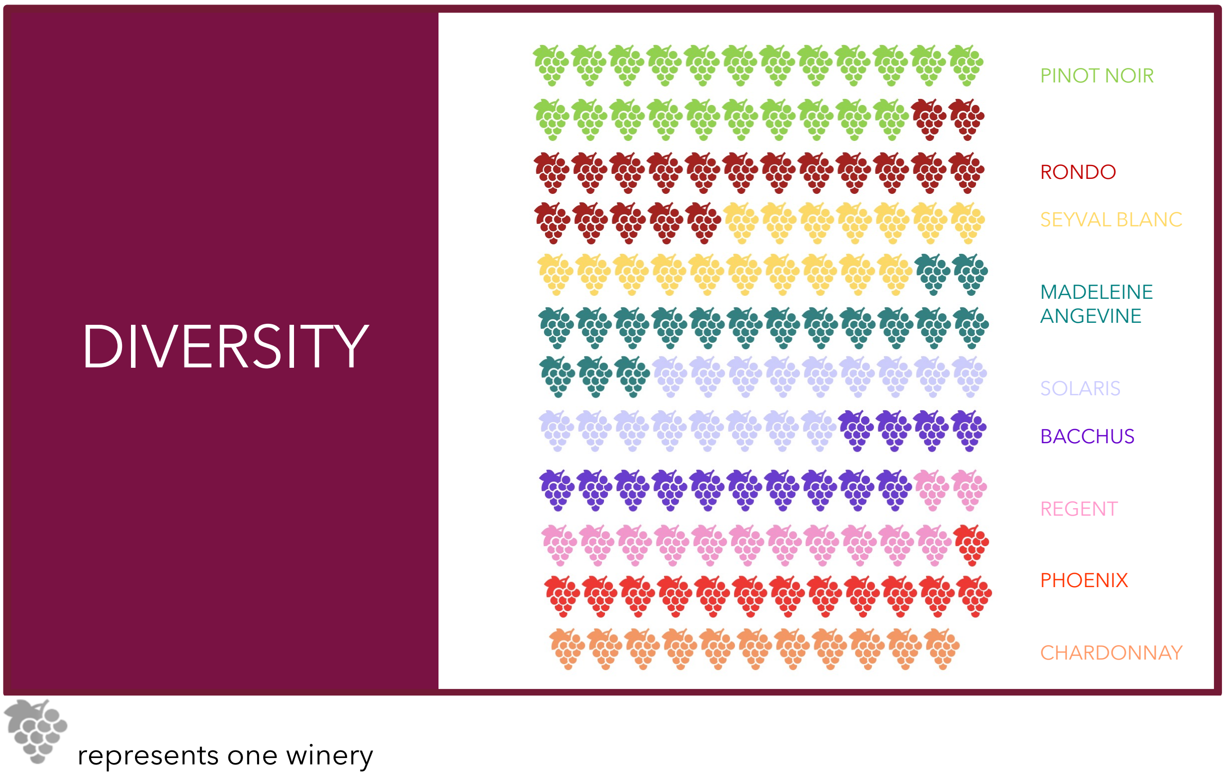
- "We were saying…'Covid has been a rubbish year for everyone, but for us as well in the vineyard, we had a really bad frost and we lost 98 percent of our crop." (interview 07)

- History (38% of wineries): heritage is a common referent for provenance stories; for Midlands and North wineries, this often took the form of family history or pre-modern history (e.g. Roman roots of winemaking in the UK; early modern heritage of the land).
- Sustainability (27% of wineries): an emphasis on various dimensions of environmental sustainability (e.g., the use of own, or locally-sourced grapes, efforts to reduce carbon footprints, and avoidance of chemically-intensive viticulture).

Diversity
The theme of diversity was an unexpected finding from our coding. It was not explicit in the stories that regional wineries tell about themselves in their external-facing representations, but emerged as a shared characteristic through the sheer range of grape varieties that wineries choose to talk about, as highlighted in Figure 7:

- 22 wineries mention Pinot Noir (59%);
- 19 mention Rondo (51%);
- 17 each mention Seyval Blanc, Madeleine Angevine, and Solaris (46% each);
- 14 mention Bacchus (38%);
- 13 each mention Regent and Phoenix (35% each);
- 11 mention Chardonnay (30%).

Figure 7: Regional varietal diversity



represents one winery

While bearing in mind that these figures relate to the *stories* that wineries are telling to external audiences (not actual proportions of planting), it is worth comparing the diversity evident across the Midlands and North region with the overall picture for English and Welsh wine (Table 12, adapted from WineGB (2020: 3) and the above findings).

Table 12: Overall grape variety diversity for English and Welsh wine

Total UK Vineyard Area (approximately 3,500 HA)				Midlands/North
Variety %	Approximate %	Approximate HA		% stories
Pinot Noir	33	1,155		59
Chardonnay	32	1,120		30
Pinot Meunier	13	455		-
Bacchus	5	175		38
Seyval Blanc	2	70		46
Pinot Gris	2	70		-
Rondo	2	70		51
Others	11	385		n/a

(Source columns 1-3: Wine Intelligence/WineGB Industry Survey 2020)

Pinot Noir is both the most commonly mentioned variety in Midlands and North stories, and most planted variety across all of the UK; the emphasis on Chardonnay is about the same. However, Midlands and North stories focus on varieties that are marginal in terms of country-wide plantings (Bacchus, Seyval Blanc, Rondo), and feature varieties that are absent (or invisible within a category of 'other') in terms of the wider picture of planting (Madeleine Angevine, Solaris, Regent and Phoenix). This emphasis on diversity echoes some of the findings set out below in section 4.2 with regard to how regional winery stakeholders perceive regional identity through their difference from their Southern peers.

4.2 Internal perceptions of the Midlands and North

In addition to identifying commonalities across the individual wineries' external-facing stories, we were also keen to identify points of consensus as to what unified the region as a professional association of winemakers. Three themes characterised producers' internal-facing perceptions of their region:

- Confidence;
- Cooperation;
- Difference.

Confidence

We found evidence of a shared sense of confidence as a unifying dynamic for the region. For example, survey respondents were asked to indicate their level of confidence or concern regarding the winery, the region, and WineGB; their responses are summarised in Table 13. (Albeit this was in relation to the small sample of respondents who answered the invitation to take part in the survey and/or an interview.)

This theme also came through in the interviews, suggesting growing confidence over time, despite an acknowledged internal diversity (re. winemaker generation; geographic distribution across a vast area) that posed a challenge for a unified regional association. As one remarked, "The availability of things has become so much easier over the last few years for equipment and knowledge and training, so we're not really out on a limb like we were when we first planted" (interview 05).

Table 13: Regional confidence

Q: Reflecting on 2020, how do you feel about the prospects for the winery, the region and WineGB, by the end of 2021? (Please answer for each)				
	Very confident	A little confident	A little concerned	Very concerned
The prospects for the winery	✔✔✔✔ ✔✔✔✔		✔✔	
The prospects for Midlands & North wine region	✔✔✔✔ ✔✔	✔✔✔	✔	
The prospects for WineGB	✔✔✔✔ ✔✔✔✔	✔	✔	

✔ represents one response

Nevertheless, there were also expressions of concern, in response to a survey question about the biggest marketing challenge going forward for the Midlands and North wine region. Responses highlighted the need to enhance the external visibility and credibility of the region. For example:

- "Getting across quality of the product"
- "Perception of quality - as we cannot grow Chardonnay, Pinot Noir or Meunier to any great success - the message from WineGB is that unless you grow these varieties you are second rate."
- "Need for coherent marketing investment."
- "Exposure in the press"
- "Retaining a distinctive regional entity within WineGB"

These responses suggest that growing regional self-confidence is not necessarily matched by confidence in the wider marketplace (at least from the point of view of producers), and foreshadow the 'difference' theme discussed below, with regard to the region's relationship to and difference from the majority of wineries that constitute WineGB.

Cooperation

Another key theme that emerged from the interviews was a shared sense of cooperation across regional members (see Figure 8; green outlined examples), which echoes the 'family' theme in the external-facing stories. Evidence of cooperation included mention (in both survey free-text responses and interviews) of being able to turn to fellow regional members for help, and/or offering assistance to others, through sharing knowledge, advice and collaborations (e.g., selling other wineries' products along with one's own), or more generally by benchmarking against regional peer role models. For example:

- "I pick the phone up and say 'I've got a problem with this, what do you think?'" (interview 04)
- "We got a lot of help, advice from all the different members." (interview 05)
- "We've got some real good players in the country now…big players that are joining and helping us… How many other industries would tell you exactly how they make their wine?" (06)
- "I've got… two vineyards which I follow for best practice. …There are some things that they do, …so, I've kind of always been benchmarking what we're doing. …We need to be working together to be able to maintain that premium." (interview 07)

Figure 8: Producer perceptions of the region

However, this theme was not universal. One interviewee noted disappointment that the cooperation they had hoped for (e.g. sharing equipment) had not materialised in practice, and one survey respondent—in terms of identifying the biggest marketing challenge going forward for the region—answered: "Bringing the group together working with each other."

Difference

Finally, the theme of 'difference' emerged from the survey and interview data (see Figure 8; blue outlined examples), and chimes with the theme of diversity that emerged from the analysis of the external-facing representations (see section 4.1). Difference was articulated in two ways: internal-facing, and external-facing.

Internal-facing articulations of difference referred to the diversity within the region. This included reference to the age range of winemakers, and the impact that generational difference might have on styles of winemaking, and familiarity with/attitudes towards marketing and social media. In addition, the region's vineyards and wineries range from a few years to second generation, and are distributed over a vast and diverse geographical terrain.

External-facing articulations of difference hinged on the region's relationship to the wider WineGB association; in particular, the difference between Midlands and North wineries and those of the South, which constitute the vast majority of UK vineyards/wineries and account for the vast majority of plantings (concentrated in the South East). Material points of difference include the number, scale and density of clusters of vineyards/wineries (summarised in Table 14). In addition, the winemaking focus differs. The Midlands and North is characterised by diverse varieties as well as a mix of still and sparkling production, whereas the South (and especially the South East) is typified by traditional

("Great British Classic") method sparkling wines made from Pinot Noir, Chardonnay and Pinot Meunier (which represent 78% of varieties by planting; see Table 12).

Table 14: Regional distribution of English/Welsh winemaking

Region	% of vineyards/wineries (total: 769)	% of planted hectares (total: 3,490 ha)
South East	29	61.5
West	23	8
Wessex	14	12
East Anglia	14	10
Thames & Chilterns	5	3
Midlands & North	11	4
Wales	4	1.5

(Adapted from WineGB 2020: 2)

Alongside these material points of difference, survey and interview responses suggested a subjective difference in ethos and attitude. Interview respondents juxtaposed their regional peers with the "big boys" or "big guys" of the South, some of whom have "too much money and too much ignorance". Similarly, survey responses (to a question about the biggest marketing challenge going forward for WineGB as a whole) pointed to the challenges of a creating a coherent message that reflected both large and small, still and sparkling producers:

- "Unified message"
- "Providing a unified industry"
- "A proper balance between large and small producers, and between still and sparkling"
- "That we're not just expensive fizz"

These responses suggest that some producers (including those who had responded positively to the WineGB webinars; see section 3.3) do not feel well represented in WineGB promotional messaging.

Some of the 'North/South divide' is likely a reflection of events occurring around the time of the project, which were referenced by several of the interviewees. The "Great British Classic Method" campaign (launched in October 2020) seeks to differentiate English and Welsh sparkling wine from sparkling competitors, and promote a "Great British Classic Method" as the country's "hero style" (WineGB 2021). While the campaign is a savvy (and arguably essential) marketing strategy in a crowded, competitive global sparkling wine market, it nevertheless has the unintended side effect of excluding producers who make still wines, or sparkling using other methods (e.g., Charmat, Pet Nat, aeration). For example:

- "You've got…older winemakers who don't make traditional method and younger winemakers who are trying to do something different, they almost feel a kinship… You're basically just cutting off a massive number of winemakers in this country who do something different and you're making yourself a little elite group." (interview 02)

Nevertheless, this external-oriented difference of the Midlands and North 'versus' the South is a potentially unifying force to override local, internal-facing differences.

5 Identifying innovation opportunities

This exploratory study had two overarching aims. In terms of the first aim: we have scoped the current state of play of the Midlands and North regional wineries' digital marketing tools and content, as reviewed in sections 3 and 4. We now turn to the second aim in order to identify innovation opportunities for Midlands and North regional wineries through digital storytelling, highlighting what we consider are the key takeaways from the findings.

To note:

- Storytelling is a route to value creation for small-scale wineries, by generating positive associations, differentiation and trust in the minds of consumers, and leading to increased engagement; such storytelling involves a host of actors, including those beyond the winery per se, such as retailers and restaurateurs. This raises the question for an emerging region such as the Midlands and North:
    - What sort of stories (provenance and regional) are meaningful and credible, for wineries and for consumers?
- The pandemic presented a number of innovation opportunities through additional time and resources, the push towards greater online engagement and online sales, and heightened consumer interest in online sales, and local and outdoor/rural tourism. Regional wineries who responded to the survey/interviews are emerging from the pandemic with a strong sense of confidence and an enhanced digital marketing approach.
- Digital storytelling and digital marketing are already part of business as usual across the region. Nevertheless, there is:
    - scope for further digital development (e.g., ensuring that websites and social media accounts are actively maintained; expansion of provision of online sales and online tours);
    - appetite for further digital development support (especially in relation to websites, social media, wine clubs—see Table 11);
    - in particular, the WineGB webinars were welcome resources, both for timely content and online delivery that did not require attendees to travel—given the geographic range of WineGB, this is a powerful platform to continue into the future.
- Of different genres of regional wine stories, Midlands and North characteristics potentially lend themselves to a 'local, regional destination' type of story, focused on:
    - Artisanal, authentic wines and wine experiences, focused on family, community and connection *with and for* local/regional wine consumers, which resonates with a regional value of cooperation, and leverages post-pandemic local consumer interest in rural tourism with a heightened regional preference for local destinations.
    - Diversity and difference, with a range of small-scale producers working with a range of grape varieties and winemaking styles to offer wine that are valued for their difference from what is available on the supermarket shelf, or elsewhere across English and Welsh wine.

5.1 Next steps

The report identifies a range of potential avenues for further research, including:

- Scaling up the evidence base for the findings, by building from the small sample size and extending the reach of the survey and/or interview data.
- Market research with regional wine and tourism consumers, to explore perceptions, desires, and purchase/visit drivers in relation to regional wine and winery visits.
- Market research on the external visibility and reputation of regional wines and international comparators (e.g. cool climate, emerging regions; small scale wineries).
- Storytelling workshops with winery representatives, consumers, and/or regional wine stakeholders to generate genuine, credible regional story content and strategy.
- Focus group and Photo Voice research with consumers to document and explore their interests in and perceptions of being 'co-producers' of wine and winery value (through adopt-a-vine, volunteering, wine clubs, word of mouth, social media, etc.).
- Surveying wineries to support a targeted regional/WineGB CPD offer (e.g. in relation to social media, TikTok, etc.).

The above research areas reflect the expertise and interests of CHEFS – the Culture, Health, Environment, Food and Society research cluster at Sheffield Hallam University. We would be keen to work with regional wineries, WineGB Midlands and North, and wider regional wine stakeholders. Regional wineries can work directly with CHEFS academics through funded research and/or consultancy programmes that cover research costs for SMEs (e.g. via the Sheffield Innovation Programme or Management Knowledge Transfer Partnership programme), as well as through student research projects and work placements (under the supervision of a CHEFS academic). And/or the areas identified in the report in relation to digital and marketing development could be addressed by drawing on CHEFS and SHU expertise in hospitality, tourism and marketing.

If you would be interested in discussing these or other research collaborations, please get in touch!

Professor Jennifer Smith Maguire, j.smith1@shu.ac.uk
Dr John Dunning, j.dunning@shu.ac.uk

July 2021

Appendix A: Research design

This research was reviewed and approved by the Faculty Research Ethics Committee of Sheffield Business School, Ethics Review ID: ER29169350 and ER31989266. Further information at https://www.shu.ac.uk/research/ethics-integrity-and-practice

Objective 1 Narrative Literature Review

Objective 1 involved a narrative literature review of current social science and marketing research on storytelling and digital storytelling, using the Science Direct database. Initial inclusion criteria:

- Published 2015 to present;
- Search terms: wine and digital marketing; wine and storytelling; wine online; wine social media.

The resulting search results were hand sorted for relevance and supplemented through ancillary searches (e.g. broadening out from wine to tourism), for a final collection of 88 articles.

Of the articles, more than half involved research with human subjects, and nearly a third focused on online content. The reviewed research was predominantly carried out using qualitative methods or mixed methods: e.g., field observations, textual (story) and netnographic analysis, case studies, questionnaires and interviews, and literature reviews. Quantitative research methods were in the minority (approximately 8% of the articles reviewed).

Objective 2 Consumer Insights Review

Objective 2 involved a purposive review of Mintel market reports to identify salient insights with regard to the Midlands and North wine and tourism consumer. Mintel reports are based on survey research with nationally representative samples of UK adults/internet users.

We focused on the most recent reports related to wine and domestic tourism:

- Mintel. 2021a. *COVID-19 and Travel: A Year On - UK - April 2021.* Mintel Academic Reports, April 2021.
- Mintel. 2021b. *Specialist Food and Drink Retailers, UK March 2021*. Mintel Academic Reports, March 2021.
- Mintel. 2020a. *Domestic Tourism: Inc Impact of COVID-19 - UK - December 2020.* Mintel Academic Reports, December 2020.
- Mintel. 2020b. *Still, Sparkling and Fortified Wine: Inc Impact of COVID-19 - UK - October 2020.* Mintel Academic Reports, October 2020.
- Mintel. 2020c. *Attitudes Towards Premium Alcoholic Drinks: Inc Impact of Covid-19 – UK – August 2020*. Mintel Academic Reports, August 2020.
- Mintel. 2020d. *The Ethical Traveller – UK – February 2020.* Mintel Academic Reports, February 2020.

Where possible, we extracted findings for the average UK adult consumer as well as how that compared with:

- a Midlands/North consumer; this required us to aggregate findings for Scotland, Northeast, Northwest, Yorkshire and Humberside, East Midlands and West Midlands (of the 11 regions that Mintel reports);
- consumers in different sociodemographic categories, comparing AB (high managerial, administrative or professional; intermediate managerial, administrative or professional) and C1C2 (supervisor, clerical, junior managerial, administrative or professional; skilled manual worker).

Objective 3 Media audit

Objective 3 involved generating an overview of the types of platforms, digital tools and content that currently typified the Midlands and North region. Using the wineries/vineyards listed on the WineGB Midlands and North website (n=37) as our sample, we conducted an audit of the web and social media presence of all of the wineries.

Data was collected from wineries' websites and social media accounts. In almost all cases, this involved an analysis of the website; in many cases, this meant one or more social media accounts in addition to the website; in a few cases, this meant a single account (e.g., Facebook) or no online presence at all beyond the information page on the WineGB website. We were interested in both textual and visual data–i.e., what was written, and the choice of images–in terms of how wineries communicated their stories to an external audience. To make the analysis of visual data more manageable, we assembled photobooks of a sub-sample of the wineries, focusing on those in the Sheffield Region and the districts of Bassetlaw, Bolsover, Chesterfield, Derbyshire, Derbyshire Dales and Northeast Derbyshire.

Data analysis involved two stages:

- deductive coding for basic elements of digital marketing–for example:
    - online sales, virtual or video tours, online tastings, wine club, website tasting notes, blog, etc.
- qualitative content analysis (Zhang & Wildemuth 2009) to identify recurrent themes across the wineries' brand stories–for example:
    - specific attributes of the viticulture, viniculture, winery history, brand story (e.g., home page or Facebook page, 'About Us' page, Instagram or Twitter posts).

It's important to bear in mind that the findings are a snapshot in time. The audit was conducted January-April 2021 (although there was some ongoing data collection, e.g., from Twitter and Instagram, and capacity to offer online sales was updated in June 2021).

Objective 4 Survey and interview data

Objective 4 sought to augment the findings from Objective 3 by exploring the perceptions and practices of Midlands and North winery representatives. To that end, we used a combination of questionnaires (n=10) and semi-structured interviews (n=7).

The online questionnaire (hosted on Qualtrics, via Sheffield Hallam University's licence) was distributed to all wineries in the sample (n=37). To maximise response rate, we sent both an initial invitation and a follow-up reminder, gave respondents a six-week completion window (mid-March until the end of April, 2021), and kept the survey short (approximately 10-12 minutes for completion) (Kost and da Rosa, 2018). Nevertheless, the response rate was low, with only 10 completions. As such, statistical analysis of the responses would be inappropriate; in the report, we simply report the raw scores where survey data usefully complements the audit findings.

The survey also included an invitation to be take part in a semi-structured interview, to allow participants to expand in-depth on their survey answers (McLellan et al. 2003). This generated one-to-one interviews with seven different Midlands and North winery representatives (owners/wine makers), conducted in May 2021. In light of the pandemic and social distancing measures, the interviews were carried out on Zoom.

Interviews were transcribed in full, and analysed via the thematic analysis approach (Fereday & Muir-Cochrane 2006). Two transcripts were coded by all four researchers to generate inductive themes and enhance intercoder reliability (Burla et al. 2008). Based on the identified themes and the findings from the audit's qualitative content analysis, all seven transcripts were then deductively coded. Exemplar quotes are provided in the report to offer further qualitative insight to the emergent themes detected through the audit.

Given the small sample sizes for the questionnaires and interviews, it would be inappropriate to treat the data as if it was representative of the views and practices of the Midland and North region more broadly. Thus, we have included the data as a complement to the findings from the audit.

References

Ageeva, E. & Foroudi, P. 2019. Tourists’ destination image through regional tourism: From supply and demand sides perspectives. *Journal of Business Research* 101: 334-348.

Akgün, A. E., Keskin, H., Ayar, H. & Erdoğan, E. 2015. The influence of storytelling approach in travel writings on readers’ empathy and travel intentions. *Procedia-Social and Behavioral Sciences* 207: 577-586.

Andreini, D., Bettinelli, C., Pedeliento, G. & Apa, R. 2020. How do consumers see firms’ family nature? A review of the literature. *Family Business Review* 33(1): 18-37.

Aqueveque, C. 2015. The influence of experts' positive word-of-mouth on a wine's perceived quality and value: The moderator role of consumers' expertise. *Journal of Wine Research* 26(3): 181-191.

Ballantyne, D., Terblanche, N. S., Lecat, B. & Chapuis, C. 2019. Old world and new world wine concepts of terroir and wine: Perspectives of three renowned non-French wine makers. *Journal of Wine Research* 30(2): 122-143.

Bassano, C., Barile, S., Piciocchi, P., Spohrer, J. C., Iandolo, F. & Fisk, R. 2019. Storytelling about places: Tourism marketing in the digital age. *Cities* 87: 10-20.

Bernal-Jurado, E., Mozas-Moral, A., Fernández-Uclés, D. & Medina-Viruel, M.J. 2021. Online popularity as a development factor for cooperatives in the winegrowing sector. *Journal of Business Research* 123: 79-85.

Bianchi, C. & Andrews, L. 2015. Investigating marketing managers' perspectives on social media in Chile. *Journal of Business Research* 68(12): 2552-2559.

Binz Astrachan, C., Botero, I., Astrachan, J.H. & Prügl, R. 2018. Branding the family firm: A review, integrative framework proposal, and research agenda. *Journal of Family Business Strategy* 9(1): 3-15.

Boatto, V., Defrancesco, E. & Trestini, S. 2011. The price premium for wine quality signals: Does retailers' information provision matter? *British Food Journal* 11(5): 669-679.

Boldosova, V. 2020. Telling stories that sell: The role of storytelling and big data analytics in smart service sales. *Industrial Marketing Management* 86: 122-134.

Burla, L., Knierim, B., Barth, J., Liewald, K., Duetz, M., & Abel, T. 2008. From text to codings: Intercoder reliability assessment in qualitative content analysis. *Nursing Research* 57(2): 113-117.

Cappeliez, S. 2017. How well does terroir travel? Illuminating cultural translation using a comparative wine case study. *Poetics* 65: 24-36.

Cassar, M. L., Caruana, A. & Konietzny, J. 2018. Positioning narratives of wine tourism websites: A lexical analysis across two different regions. *Journal of Wine Research* 29(1): 49-63.

Charters, S. & O'Neill, M. 2001. Service quality at the cellar door: A comparison between regions. *International Journal of Wine Marketing* 13(3): 7-17.

Charters, S. & Spielmann, N. 2014. Characteristics of Strong Territorial Brands: The Case of Champagne. *Journal of Business Research* 67: 1461–1467.

Cuomo, M. T., Tortora, D., Festa, G., Giordano, A. & Metallo, G. 2016. Exploring consumer insights in wine marketing: An ethnographic research on #winelovers. *Psychology & Marketing* 33(12): 1082-1090.

Danner, L., Ristic, R., Johnson, T.E., Meiselman, H.L., Hoek, A.C., Jeffery, D.W. & Bastion, S.E.P. 2016. Context and wine quality effects on consumers' mood, emotions, liking and willingness to pay for Australian shiraz wines. *Food Research International* 89(1): 254-265.

Delgado-Ballester, E. & Fernández-Sabiote, E. 2016. "Once upon a brand": Storytelling practices by Spanish brands. *Spanish Journal of Marketing-ESIC* 20(2): 115-131.

Demossier, M. 2018. *Burgundy: The Global Story of Terroir*. New York: Berghahn.

Dessart, L. & Pitardi, V. 2019. How stories generate consumer engagement: An exploratory study. *Journal of Business Research* 104: 183-195.

Di Vita, G., Caracciolo, F., Brun, F. & D'Amico, M. 2019. Picking out a wine: Consumer motivation behind different quality wines choice. *Wine Economics and Policy* 8(1): 16-27.

Dolan, R. & Goodman, S. 2017. Succeeding on social media: Exploring communication strategies for wine marketing. *Journal of Hospitality and Tourism Management* 33: 23-30.

Downing J.A. & Parrish C.S.C.D. 2019. Welcome to *my* house, do you like the neighborhood? Authenticity differentiation within strategic groups of wineries. In: M. Sigala & R. Robinson (Eds) *Management and Marketing of Wine Tourism Business*, pp. 277-94. Palgrave Macmillan, Cham.

Escandon-Barbosa, D. & Rialp-Criado, J. 2019. The impact of the content of the label on the buying intention of a wine consumer. *Frontiers in Psychology* 9: 2761.

Eustice, C., McCole, D. & Rutty, M. 2019. The impact of different product messages on wine tourists' willingness to pay: A non-hypothetical experiment. *Tourism Management* 72: 242-248.

Fereday, J. & Muir-Cochrane, E. 2006. Demonstrating rigor using thematic analysis: A hybrid approach of inductive and deductive coding and theme development. *International Journal of Qualitative Methods* 5(1): 1-11.

Flavián, C., Ibáñez-Sánchez, S. & Orús, C. 2019. Integrating virtual reality devices into the body: Effects of technological embodiment on customer engagement and behavioral intentions toward the destination. *Journal of Travel & Tourism Marketing* 36(7): 847-863.

Frost, W., Laing, J., Strickland, P. & Smith Maguire, J. 2020. Seeking a Competitive Advantage in Wine Tourism: Heritage and Storytelling at the Cellar-Door. *International Journal of Hospitality Management* 87. DOI: 10.1016/j.ijhm.2020.102460

Galati, A., Schifani, G., Crescimanno, M. & Migliore, G. 2019. "Natural wine" consumers and interest in label information: An analysis of willingness to pay in a new Italian wine market segment. *Journal of Cleaner Production* 227: 405-413.

Gallucci, C., Santulli, R. & Calabrò, A. 2015. Does family involvement foster or hinder firm performance? The missing role of family-based branding strategies**.** *Journal of Family Business Strategy* 6(3): 155-165.

Gilliam, D. A. & Flaherty, K.E. 2015. Storytelling by the sales force and its effect on buyer–seller exchange. *Industrial Marketing Management* 46: 132-142.

Hartman, S., Parra, C. & de Roo, G. 2019. Framing strategic storytelling in the context of transition management to stimulate tourism destination development. *Tourism Management* 75: 90-98.

Ikäheimo, J.P. 2021. Arctic narratives: Brewing a brand with neolocalism. *Journal of Brand Management* 1-14.

Johnson, H. & Robinson, J. 2009. *The World Atlas of Wine*. 6th edition. Mitchell Beazley.

Kamboj, S., Sarmah, B., Gupta, S. & Dwivedi, Y. 2018. Examining branding co-creation in brand communities on social media: Applying the paradigm of Stimulus-Organism-Response. *International Journal of Information Management*.39: 169-185.

Kim, M.J. & Hall, C. M. 2020. What drives visitor economy crowdfunding? The effect of digital storytelling on unified theory of acceptance and use of technology. *Tourism Management Perspectives* 34: 100638.

Kost, R.G. & da Rosa, J.C. 2018. Impact of survey length, and compensation on validity, reliability, and sample characteristics, for ultrashort-, short- and long-research participant perception surveys. *Journal of Clinical and Translational Science* 2(1): 31-37.

Lacoste, S. & La Rocca, A. 2015. Commentary on "Storytelling by the sales force and its effect on buyer–seller exchange" by David Gilliam and Karen Flaherty. *Industrial Marketing Management* 46: 143-146.

McLellan, E., MacQueen, K.M. & Neidig, J.L. 2003. Beyond the qualitative interview: Data preparation and transcription. *Field Methods* 15(1): 63-84.

Mintel. 2021a. COVID-19 and Travel: A Year On - UK - April 2021. Mintel Academic Reports, April 2021.

Mintel. 2021b. Specialist Food and Drink Retailers, UK March 2021. Mintel Academic Reports, March 2021.

Mintel. 2020a. Domestic Tourism: Inc Impact of COVID-19 - UK - December 2020. Mintel Academic Reports, December 2020.

Mintel. 2020b. Still, Sparkling and Fortified Wine: Inc Impact of COVID-19 - UK - October 2020. Mintel Academic Reports, October 2020.

Mintel. 2020c. Attitudes Towards Premium Alcoholic Drinks: Inc Impact of Covid-19 – UK – August 2020. Mintel Academic Reports, August 2020.

Mintel. 2020d. The Ethical Traveller – UK – February 2020. Mintel Academic Reports, February 2020.

Moin, S., Hosany, S. & O'Brien, J. 2020. Storytelling in destination brands' promotional videos. *Tourism Management Perspectives* 34: 100639.

Moscardo, G. 2020. Stories and design in tourism. *Annals of Tourism Research* 83: 102950.

Overton, J. 2019. Rural idylls and urban economies: the making of metropolitan wine regions. *Journal of Wine Research* 30(3): 238–258.

Pelet, J., Durrieu, F. & Lick, E. 2020. Label design of wines sold online: Effects of perceived authenticity on purchase intentions. *Journal of Retailing and Consumer Services* 55: 102087.

Pera, R. 2017. Empowering the new traveller: Storytelling as a co-creative behaviour in tourism. *Current Issues in Tourism* 20(4): 331-338.

Petit, O., Velasco, C. & Spence, C. 2019. Digital sensory marketing: Integrating new technologies into multisensory online experience. *Journal of Interactive Marketing* 45: 42-61.

Rabbiosi, C. 2016. Place branding performances in tourist local food shops. *Annals of Tourism Research* 60: 154-168.

Roggeveen, A.L., Grewal, D., Karsberg, J., Noble, S.M., Nordfält, J., Patrick, V.M., Schweiger, E. et al. 2021. Forging meaningful consumer-brand relationships through creative merchandise offerings and innovative merchandising strategies. *Journal of Retailing* 97(1): 81-98.

Rytkönen, P., Vigerland, L. & Borg, E. 2021. Tales of Georgian wine: Storytelling in the Georgian wine industry. *Journal of Wine Research* DOI: 10.1080/09571264.2021.1940903

Ryu, K., Lehto, X. Y., Gordon, S. E. & Fu, X. 2018. Compelling brand storytelling for luxury hotels. *International Journal of Hospitality Management* 74: 22-29.

Sillani, S., Miccoli, A. & Nassivera, F. 2017. Different preferences for wine communication. *Wine Economics and Policy* 6(1): 28-39.

Singer, A. 2018. Strategies of distinction: Aesthetic materiality and restrained discourse. *Poetics* 67: 26-38.

Smith Maguire, J. 2018. Wine, the authenticity taste regime and rendering craft. In E. Bell, G. Mangia, S. Taylor & M.L. Toraldo (Eds). *The Organization of Craft Work: Identities, Meanings and Materialities*, 60-78. London: Routledge.

Smith Maguire, J. 2013. Provenance as a Filtering and Framing Device in the Qualification of Wine. *Consumption, Markets and Culture* 16(4): 368-91.

Smith Maguire, J., Strickland, P. & Frost, W. 2013. Familiness as a form of value for wineries: A preliminary account. *Journal of Wine Research* 24(2): 112-127.

Spielmann, N., Jolly, S. & Parisot, F. 2014. Terroir in the media: The poetry of people, place and palate. *International Journal of Wine Business Research* 26(3): 224–240.

Spielmann, N. & Mantonakis, A. 2018. In virtuo: How user-driven interactivity in virtual tours leads to attitude change. *Journal of Business Research* 88: 255-264.

Triana, B.J. 2019. Use of culture in the website brand management of Kentucky wine producers. *The Qualitative Report* 24(9): 2372-2400.

Van Laer, T., Feiereisen, S. & Visconti, L.M. 2019. Storytelling in the digital era: A meta-analysis of relevant moderators of the narrative transportation effect. *Journal of Business Research* 96: 135-146.

Voronov, M., De Clercq, D., Hinings, C. R. 2013. Conformity and distinctiveness in a global institutional framework: The legitimation of Ontario fine wine. *Journal of Management Studies* 50: 607-645.

Vrettakis, E., Kourtis, V., Katifori, A., Karvounis, M., Lougiakis, C. & Ioannidis, Y. 2019. Narralive–Creating and experiencing mobile digital storytelling in cultural heritage. *Digital Applications in Archaeology and Cultural Heritage* 15: e00114.

Warman, R.U. & Lewis, G.K. 2019. Wine place research: Getting value from terroir and provenance in premium wine value chain interventions. *International Journal of Wine Business Research* 31(4): 493-508.

Wen, H. & Leung, X.Y. 2021. Virtual wine tours and wine tasting: The influence of offline and online embodiment integration on wine purchase decisions. *Tourism Management* 83: 104250.

Wine Australia 2020a. Growth in online sales likely to be legacy of COVID-19. *Wine Australia Market Bulletin* 214, 11 August. Online.

Wine Australia. 2020b. How the pandemic has boosted digital retail. *Wine Australia Market Bulletin*. 198, 21 April. Online.

WineGB. 2020. *2020 Industry Report*. WineGB Online.

WineGB. 2021. Great British Classic Method. Accessed 16 July 2021. WineGB Online.

Youn, H. & Kim, J. 2017. Effects of ingredients, names and stories about food origins on perceived authenticity and purchase intentions. *International Journal of Hospitality Management* 63: 11-21.

Zanon, J., Scholl-Grissemann, U., Kallmuenzer, A., Kleinhansl, N. & Peters, M. 2019. How promoting a family firm image affects customer perception in the age of social media. *Journal of Family Business Strategy* 10(1): 28-37.

Zhang, Y. & Wildemuth, B.M. 2009. Qualitative analysis of content. In B.M. Wildemuth (Ed) *Applications of Social Research Methods to Questions in Information and Library Science*, pp. 308-19. Libraries Unlimited.