

# Uncorking Identity

## Exploring Consumer-Brand Identification within the South African Wine Industry

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# WPI



women  
in wine

# **Uncorking Identity**

## **Exploring Consumer-Brand Identification within the South African Wine Industry**

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submitted to the Faculty of  
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# Authorship

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# Abstract

New wine producers in South Africa struggle to enter the established domestic wine market. This project investigated the importance of identity in wine consumption. We conducted a survey (n=102) to assess drivers of consumer-brand identification, a paired comparison of wine labels (n=59), and interviewed industry experts (n=10). Results indicate that identity does have an influence on consumer wine preferences, with black consumers identifying with labels displaying South African traits. Additionally, brand prestige, social benefits, distinctiveness, and warmth influence wine purchasing preferences more generally. New producers should market their distinct identities (black, female) as they reveal warmth and familiarity to certain consumer segments, and can drive brand distinctiveness.

# Executive Summary

Prior to the first democratic elections in 1994, South Africa's historical policies of racial segregation allowed the wine industry to be controlled by 4,500 white male producers. With the removal of the KWV Act in 1997, the domestic wine industry was able to expand, providing opportunities for new wine producers to enter the industry. Despite the expansion, long-standing white male dominance within the industry has perpetuated making it difficult for black and female producers to become established within the market (Linton, 2012). New producers have felt compelled to comply with industry marketing standards, removing their unique identities from their product labels (including using isiXhosa or isiZulu names and imagery that conveys their South African, racial, and gender identities). The current project aims to explore the issues of identity with regards to wine consumption in an effort to inform new producers, like our sponsor Women and Wine, how they might consider future brand imagery.

Wines are grouped into two distinct categories – Old World and New World – and their labels reflect this distinction. Old World style labels offer a more traditional look, emulating the traits of Old World wines (European) that convey heritage with images of vineyards and dates of establishment (Roth & Romeo, 1992). In contrast, New World wines (e.g., Chile, Argentina, Australia, South Africa) convey their identities with labels that offer more modern, abstract, and stylistic characteristics as many do not make their wines from a single established vineyard (Albanese, 2013). Consumer assessment research indicates that Old World wines or wine with Old World style labels convey a sense of quality; whereas, New World style labels suggest a cheaper and lower quality product (Sherman & Tuten, 2011, p.228). The characteristics of a wine label extend beyond Old and New World styles, depicting other aspects of identity including femininity, race, and nationality. We hypothesized that these characteristics also play an important role in how consumers select wine products as they correspond with consumer identities (gender, race, and/or nationality). Given the emergence of a black middle class in South Africa, these factors are important for wine producers and others within the domestic industry to consider (Van Rooyen, Ndanga, & Louw, 2010).

This project investigated the different consumer drivers, label characteristics, and consumer demographics that may influence wine consumption patterns in the domestic South

African wine market in an effort to understand how new producers explore future directions. To do this, we assessed the perceptions of 10 industry professionals (producers, label designers, and members of governing wine industry organizations) on factors that influence consumer-brand identification in the domestic wine industry along with their suggested strategies for new producers to market their products. We surveyed 102 individuals (mainly from the United States) to better understand if drivers of consumer-brand identification (CBI) predicted CBI in the wine industry (survey adapted from Stokburger-Sauer, et al. 2012). A consumer's self-association with a brand, consumer-brand identification (CBI), may play a role in consumer wine purchasing habits, although this has never before been assessed. Research on CBI reveals six key predictive drivers of consumption patterns, namely brand self-similarity, brand prestige, brand warmth, brand distinctiveness, brand social benefits, and memorable brand experiences (Stokburger-Sauer, Ratneshwar, & Sen, 2012). Finally, we examined how wine label characteristics reflecting producer identities (e.g., gender, race, and nationality) influenced domestic wine buyer's preferences, asking 59 individuals to complete a paired comparison exercise. In this task, participants were asked to select a single preferred wine label from 28 pairings of 8 different wine labels that reflected New/Old World styles, feminine/masculine characteristics, and South African/neutral characteristics.

Results from industry professional interviews and the survey indicate that there are four key drivers that predict CBI within the wine industry: brand prestige, brand social benefits, brand distinctiveness, and brand warmth. Industry professionals highlighted the importance of brand building exercises and the acquisition of land to drive CBI, as well as the influence of brand prestige and brand warmth as the driving success for both established and new producers. Results also indicate that label characteristics along with consumer identities influence consumer preferences. Analyses of the paired comparison task revealed that, as with previous research (Sherman & Tuten, 2011), Old World style labels were preferred over New World style labels, regardless of consumer demographics (race, gender, age, or familiarity with wine). When looking specifically at labels that depicted South African characteristics, black and male consumers preferred labels that depicted South African characteristics more than white and female consumers.

In conclusion, the current work indicates that wine producers should focus on developing prestige, distinctiveness, and warmth, and highlighting the social benefits of supporting the expansion of the industry towards greater inclusiveness. While land is an



important aspect to drive CBI, it must be used as a tool to promote prestige (even heritage) and distinctiveness. Based on this work, we believe that new producers should continue to make active efforts to convey their identities as South African, black, and/or women to consumers, given the positive responses these identities prompted among domestic consumers. However, new producers need to convey this identity as distinct, and prestigious, drawing on consumer sentimentalities towards supporting efforts to promote social inclusiveness in South Africa.

# Introduction

Prior to the first democratic elections in 1994, South Africa's historical policies of racial segregation allowed the wine industry to be controlled by 4,500 white male producers. The Cooperative Winegrowers' Association of South Africa Limited (KWV), an exclusive collection of white men, determined who could produce and sell wine (Fridjohn, 2017). With the removal of the KWV Act in 1997, the domestic wine industry was able to expand, providing opportunities for new wine producers to enter the market. The total area of vineyards increased by 10,000 hectares by the year 2000. In addition, between 1995 and 2000, the percent export of wine production increased from 5.8% to 26.1% (Ewert, 2012). Despite the expansion, long-standing white male dominance within the industry has perpetuated (Ewert, 2012).

Government policies have aimed to create greater gender and racial inclusivity within the South African economy, including the wine industry. These policies include the Black Economic Empowerment (BEE) Act introduced in 1998 (Linton, 2012) and policies implemented by the Department of Land Affairs (Hamman & Ewert, 1999).<sup>1</sup> Taking advantage of these new policies, our sponsor Women in Wine and 41 other black-owned brands have been able to develop their own wine. As these brands work to establish themselves within the market, they continue to face challenges such as access to the considerable capital investment necessary, and perceptions relating to the quality of their products. These companies are searching for ways to create a space for their products domestically as they compete with other well-established brands. In addition, these companies are trying to reach the growing market segment of young black elites.

To make informed decisions about how best to target their products towards domestic consumers, producers look to established experts within the industry including wine industry governing bodies and graphic designers. Current research indicates that labels reflecting Old World style characteristics of long established and reputable European wine producers offer the perception of a higher quality product to consumers (Sherman & Tuten, 2011). By contrast, New World wines (e.g., Australia, South Africa, Argentina, Chile) tend to use labels that are more contemporary in design, that consumers are perceiving as lower quality as the

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<sup>1</sup> Any previously disadvantaged population group could take advantage of the BEE and DLA policies, claiming "black" status as a Black, Coloured or Indian person (Ministry of Trade and Industry, 2005).

grapes come from less established vineyards and are often sourced from multiple vineyards (Sherman & Tuten, 2011). Consequently, some New World wines opt to develop a label reflecting the style of Old World wines (e.g., Nederburg, Robertson, Tokara) in an effort to display a product of high quality. However, there are other characteristics that can be depicted in a wine label, such as race, femininity, and/or representations of nationality. It is important to understand whether these other characteristics, beyond Old World and New World style, influence consumer preferences.

While the wine label plays a role in consumer perceptions of quality, studies on consumer product selection suggest that consumer purchasing decisions are based on more than a single trait (Stokburger-Sauer et al., 2012). Recent research identified six key drivers (self-similarity, memorable brand experience, distinctiveness, warmth, social benefits, and prestige) that predict consumer-brand identification, or when a consumer self-associates with a brand (Stokburger-Sauer et al., 2012). In addition, race, nationality, gender, and personal values also play a role in consumer-brand identification (Stokburger-Sauer et al., 2012), and in turn consumer purchasing decisions. However, there is a gap in the literature on how these six drivers and additional personal characteristics influence consumer-brand identification in the wine industry. Furthermore, the wine market in South Africa is potentially changing with a new emerging black middle class (Van Rooyen et al., 2010). Therefore, it is important to understand whether the drivers identified in previous research also predict consumer purchasing decisions within the wine industry, especially given South Africa's changing market demographics including the expansion of a black middle class.

Given the inequalities that continue to exist in the wine industry, we aimed to provide evidence to support black owned wine brands and specifically our sponsor Women in Wine's understanding of domestic consumption of South African wine. To accomplish this, we conducted semi-structured interviews with industry professionals and surveyed wine consumers to get a better sense of the drivers that predict consumer-brand identification. Through interactions with local consumers, we explored how different label traits (i.e., New World style, feminine, and South African) as well as consumer demographics influenced consumer preferences. The insights gained from industry professionals and consumers guided our understanding of how identity influences consumer purchasing decisions in the wine industry.

# Background

## Progress towards greater equality within the South African wine industry

The apartheid era KWV Act gave control of the wine industry to 4,500 white and male farmers of the Cooperative Winegrowers' Association of South Africa Limited (KWV). The KWV set prices for distilling wine, quotas on production, and standards on 'good' wine (Ewert, 2012), and it was the sole exporter of wine from South Africa to the international market (Fridjohn, 2017). With the fall of South Africa's apartheid government in the early 1990s, international embargos that plagued South African exports were lifted resulting in greater economic expansion opportunities for many South African companies. Without the KWV in control, wine producers no longer had to meet quality demands (Estreicher, 2014) and the lifted sanctions allowed producers to enter international markets. Consequently, the number of wine sellers, wineries, and wine labels skyrocketed with the total area of vineyards increasing by 10,000 hectares by the year 2000 (Ewert, 2012). Wine exports also increased from 5.8% in 1995 to 26.1% in 2000 (Ewert, 2012).

While these changes allowed opportunistic investors to obtain a place within the wine industry, they did not solve the long-standing social issues that plagued the industry for years. In other words, the white male farmers still dominated the South African wine industry, and this deterred further industry expansion (Linton, 2012). To address the unequal division of land by race and gender the Department of Land Affairs (DLA) was introduced in 1997. The DLA aims for land transfer to people disadvantaged by apartheid policies and provides financial and land-related supportive services (Hamman & Ewert, 1999). In an attempt to further rectify the social inequalities, the Black Economic Empowerment (BEE) Act was enacted in 1998 to promote economic opportunities for black and coloured<sup>2</sup> South Africans throughout all levels of industry. According to the BEE, companies need to maintain an employee distribution that reflects the racial distribution of the country. The BEE "measures companies' empowerment progress in terms of ownership and control of assets, senior-level management, human resource development, and employment equity" (Linton, 2012, p. 728).

These initiatives placed a strong emphasis on women in particular, allowing females to take increasingly larger roles in both the household and farm industries (May, Stevens, &

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<sup>2</sup> Coloured is an established racial group in South Africa, consisting of any individual that is of mixed race.

Stols, 2002). Women have begun to enter the media, corporations, and political operations, assuming roles of importance thereby inciting change within industries and society. For example, groups like the National Women's Coalition, have made moves in parliament and government to reinforce gender equality provisions under the constitution (Romero, 1998). In a study of entrepreneurship, Minniti and Naude (2010) describe women as the crucial factor for future growth of new businesses. Additionally, women have been recognized as the key contributors to the increase of black-owned business worldwide (Becker-Medina, 2016). In South Africa, the expanded role of women in business also propelled women within the wine industry. For instance, women are now a part of discussions in the government relating to equality within the wine industry.

Currently, the South African wine industry collaboratively established initiatives that are working to “transform” the industry. VinPro, the organization responsible for transformation within the industry, as well as SALBA (South African Liquor Brand owners Association), the organization responsible for manufacturing and distribution, established a transformation unit that works to promote job equality and opportunity throughout the industry (Bowes, 2016). The unit works on the creation of decent jobs, ethical trade, social investment, training, and enterprise development all with an additional focus on black economic development. In addition, the Wine Industry Value Chain Round Table (WIVCRT) works to open up dialogue between members of the wine industry and government officials, and the Wine Industry Strategic Exercise (WISE) facilitates collaboration between all levels of wine development (e.g., makers and producers; Bowes, 2016). This has allowed for government to gain an understanding of particular needs of those in the wine industry, and helped develop a “robust, globally competitive, and profitable South African wine industry” (Bowes, 2016, p.7). With these initiatives in place, the wine industry hopes to see about a 20% increase in the amount of black owned land within the next 10 years.

Taking advantage of the expanded opportunities and government initiatives to spur growth and empower formerly marginalized communities, a group of 20 women with experience in the wine industry united in 2006 to establish the wine producer, Women in Wine. These founders, having previous experience in the wine industry, found passion for empowering farm communities and “became an advocate for women being overlooked in the [wine] industry” (Women in Wine About Us, 2015). Collectively, they became the first wine producer in South Africa to be owned entirely by black women. As they set out to reach their goal of giving South African women a fair share of the industry, they transformed traditional

perceptions of successful wine companies. Women in Wine prides itself on its collaborative work with various empowerment organizations.

To expand their influence on the market, Women in Wine has joined forces with the Treasure Chest Collective – a collaboration between 12 formerly marginalized wine makers within the Western Cape Province. Together they work to promote their wines and their ideals of empowerment. Malcolm Green, the principle of the Treasure Chest Collective, describes the collective as “not an industry body or some committee; we are entrepreneurs and we go to the heart of what South Africa stands for – transformation, economic development, quality supply, and job creation” (Bongela, 2017, p.1).



**Figure 1.** Members of the Treasure Chest Collective posing with their respective wine bottles at a ribbon cutting ceremony (Bongela, 2017).

To produce their wine, Women in Wine formed partnerships with already existing businesses in the wine industry (e.g., farmers, cellars, and packaging and bottling companies), because they lacked established capital investment and infrastructure to purchase their own land and vineyards (McLean, Tomasian, Strangio, & Visser, 2016). Founded on the principles of equality, the organization is able to boast that their wine is “only sourced from farms that comply with socio-economic legislation with specific reference to ethical and environmental practices, employment conditions, skills development and training, as well as address aspects of black economic empowerment” (Women in Wine About Us, 2015). Women in Wine is currently in talks with the established vineyard, the Nelson Wine Estate,

to obtain a small amount of farmland to grow their own grapes and work in collaboration with its cellar. The Nelson Wine Estate is hoping to accomplish their BEE goals they set out years prior. With this land and cellar, Women in Wine hopes to ground the company and work to grow the brand as established winemakers.

## **Challenges within the South African wine industry**

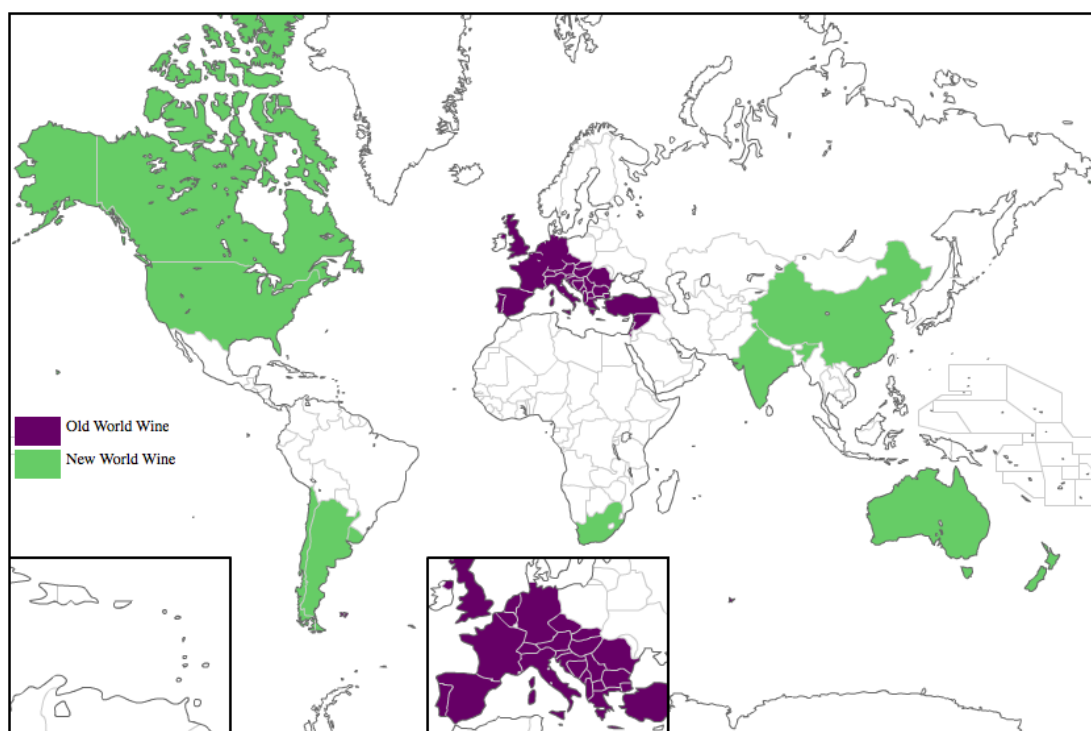
As Women in Wine continues to grow, it faces challenges from established global and domestic industries. Being a member of the Treasure Chest Collective has helped form bonds and open dialogue about these struggles. As Malcolm Green describes, “Our uniqueness is in our struggle and [we continue to suffer] from being marginalized by a 360-year-old white male-dominated industry” (Bongela, 2017, p.1). The Treasure Chest Collective members report having difficulty getting their brands into the domestic market because buyers and retailers do not feel the need to support new local wine brands (Bongela, 2017). This makes it difficult for new wine producers to establish their brands in South Africa.

Although organizations like Women in Wine and the Treasure Chest Collective exemplify the new opportunities for women and blacks in South Africa, previously disadvantaged groups continue to struggle in all levels of industry. Due to the lack of strict rules and regulations set out by BEE and DLA policies, companies have been able to avoid significant reforms in land, labor practice, and worker equity (Du Toit, Kruger, & Ponte, 2008). Within the wine industry, initiatives promising greater opportunities for black producers made at the start of the new democratic government have fallen short of their goals (Ewert, 2012). The wine industry is still controlled and regulated by predominantly white males, despite the acquisition of wine estates by black business owners and the emergence of BEE labels. Less than 8% of vineyard land has been redistributed, significantly less than the original goal of the DLA to redistribute a third of white owned farmland (Iob, 2012). Furthermore, the DLA has failed to support black farmers leading to 90% of the redistributed land no longer being able to produce wine. Ruth Hall, a black farmer, describes that after a year of farming, paying for employees and other debts left little money for the next year’s farming, creating an unsustainable trend (Benson, 2016;, Iob, 2012).

As a predominantly white and male industry, there remains a strong bias against blacks and women. Ann Matasar (2006, p.5) explains that because wine has historically been “linked with religious worship, revelry, camaraderie, and upper-class entitlement, wine has



often been a beverage reserved for men of privilege” which resulting in white men being the main consumers of wine. Catholic religious traditions were a driving factor of wine’s success in Europe. The need for wine in every Catholic mass allowed many white men to experience and adopt wine. Catholic missionaries would plant grapes in new areas of the continent to keep up religious traditions as they preached the Catholic mission (Matasar, 2006). As missionaries moved out of Europe, they brought with them their opinions and tastes of wine (Benson, 2016). According to Matasar (2006), without the experience of growing, producing, and drinking wine, wineries established outside Europe followed the Old World model as they produced their New World wines. Consequently, the European white-male influence permeated the entire global wine industry, throughout the Old World (France, Italy, and Spain) and into the New World (e.g., United States, Argentina, Chile, Australia, New Zealand, and South Africa) (Figure 2).



**Figure 2.** Map of New World and Old World wines (Belack, 2014)

Old World wines have carried a branded image for centuries, while New World wines remain in the formative stages (Moulard, Babin, & Griffin, 2015). Due to Old World wines long establishment, experienced and knowledgeable wine consumers perceive Old World style wines as high-end quality wines (Lunardo & Guerinet, 2007). Old World wines focus on



marketing their *terroir*, or taking pride in the origin of the grapes and their variation between regions within these countries (Moulard et al., 2015). Consequently, Old World style wine labels accentuate the origin of the grape. Old World style labels pride themselves on their origin because consumers perceive the quality of wine as related to the country's production history (Roth & Romeo, 1992), Figure 3. In contrast, New World wines accent the grapes used to make the wine, with less of a focus on place, providing a “bolder, more luscious [wine that is] bursting with flavor” (Albanese, 2013). These distinctions are conveyed on the label. As shown in Figures 3 and 4, Old World style labels highlight the region of production, while New World labels indicate the type of grapes used.



**Figure 3:** Example of Old World style label  
(The Girl Who Loved Wine, 2017)



**Figure 4:** Example of New World style label  
(The Girl Who Loved Wine, 2017)

While the characteristics of what goes into a label are defined, it is unclear how each type of label relates to consumer-brand identification (CBI). For the purpose of this research, consumer-brand identification is defined as the consumer self-associating with any trait of a product (Reed, Forehand, Puntoni, & Warlop, 2012). Research looking at general product

selection suggests there are six key drivers in the formation of consumer-brand identification: brand-self similarity, brand distinctiveness, brand prestige, brand social benefits, brand warmth, and memorable brand experiences (Stokburger-Sauer et al., 2012). The drivers, defined by Stokburger-Sauer and colleagues, are further described in Table I.

CBI Traits	Description
Brand-self similarity	Consumers gravitate toward products that they find similar to themselves. This similarity can be based on aspects of one’s physical nature (e.g., race, gender, social class/status, personality, and values (Antioco, Vanhamme, Hardy, & Bernardin, 2012; Stokburger-Sauer et al., 2012). In addition, people may not consider themselves similar to a product at the time of purchase, but they purchase a product because it represents what they strive to be (Reed et al., 2012).
Brand prestige	Consumers choose products that allow them to self-enhance because the prestige from the product can boost self-esteem.
Brand social benefits	Consumers choose a brand to enter social groups or “brand communities” (Stokburger-Sauer et al., 2012, p.409).
Brand warmth	Consumers choose a brand that they have more of an emotional connection with rather than a rational relationship. The appearance of the product or label often conveys this trait (Stokburger-Sauer et al., 2012, p.409).
Memorable brand experiences	Consumers choose brands based on positive experiences they had with the brand in the past. Consumers may even feel a sense of nostalgia.
Brand distinctiveness	Consumers choose brands that distinguish themselves from others.

**Table I.** CBI key drivers (Stokburger-Sauer et al., 2012).

While all these drivers impact consumer purchasing decisions, they may be particularly influential in the purchase of Old World style wines. In an effort to understand the influence of wine labels in purchasing decisions, Sherman and Tuten (2011) surveyed 527 individuals, asking participants to select wine labels manipulated to display a conservative, contemporary, or novel design. The labels were created such that the only aspect that differed was the design of the label while the name, year produced, and vineyard location remained the same (Figure 5). The study found conservative labels to be associated with the adjectives “good, desirable, high quality, and pleasant” while contemporary and novelty styles tend to be associated with the descriptors “cheap” and “low quality” (Sherman & Tuten, 2011, p.228). The attributes “good, desirable, high quality, and pleasant” align with the three drivers mentioned above: brand-self similarity, brand prestige, and brand social benefits. A

consumer may inherently find similarities with a brand seen as good, find prestige in a brand known for high quality, and find social benefits in a brand that is desirable or pleasant.

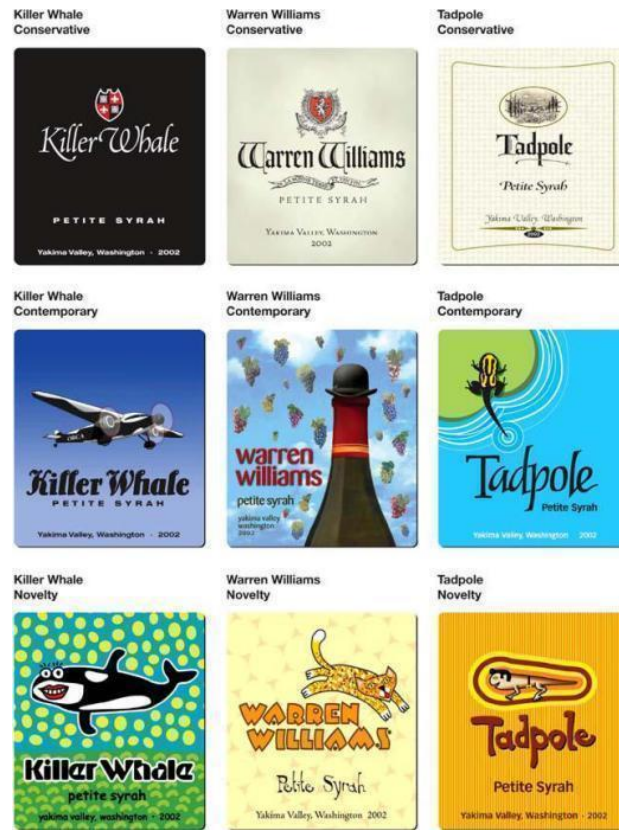


Figure 5. Modified wine label designs for survey (Sherman & Tuten, 2011).

Preferences for Old World style wine labels are not only emerging in research but also in business practices. Although all South African wines are New World, some take on Old World style label characteristics in an effort to convey a sense of establishment, quality, and vintage (Jarvis, Mueller, & Chiong, 2010). This allows producers to build brand identification under those attributes. One such company, African Roots Wine Brands (a black and female wine producer in South Africa) entered the market with its mid-range wine, Seven Sisters. The Seven Sisters label is contemporary in its design, displaying seven sisters dancing (Figure 6). Working closely with a former wine buyer for Woolworths (a high-end domestic grocery store), Ivan Oertle, African Roots Wine Brands decided to develop a reserve line, Brutus, aiming for a more elite market (McLean et al., 2016). The Brutus label reflects characteristics of the Old World style including a family crest, which can indicate establishment, heritage, and prestige (Figure 6).



**Figure 6.** Seven Sisters and Brutus labels (Seven Sisters - Our Wine, 2014; The Village Table – Gallery, 2017)

The introduction of the Brutus label is not the only example of a company targeting a different consumer segment by employing different label design characteristics. The wine brand Thokozani, founded by Denise Stubbs and David Sonnenberg in 2007, similarly shifted its brand image in an effort to expand its market potential (Thokozani, 2017). According to Denise Stubbs, the research they had done with Woolworths when listing Thokozani found that “there is still an assumption that BEE products are inferior because you are learning the ropes” (Moodley, 2017). Woolworths suggested a name change, arguing that the name Thokozani, an isiZulu word meaning “celebration,” struggled to entice people to purchase and dive deeper into the story of the company (Edo, 2017). In fact, customers who participated in a blind tasting enjoyed the taste and quality of the wine, but customers who were shown the label before appeared to be hesitant about the quality of the wine (McLean et al., 2016). As result, the brand shifted to the present-day Ovation name with a label that resonated better with consumers in the domestic market.



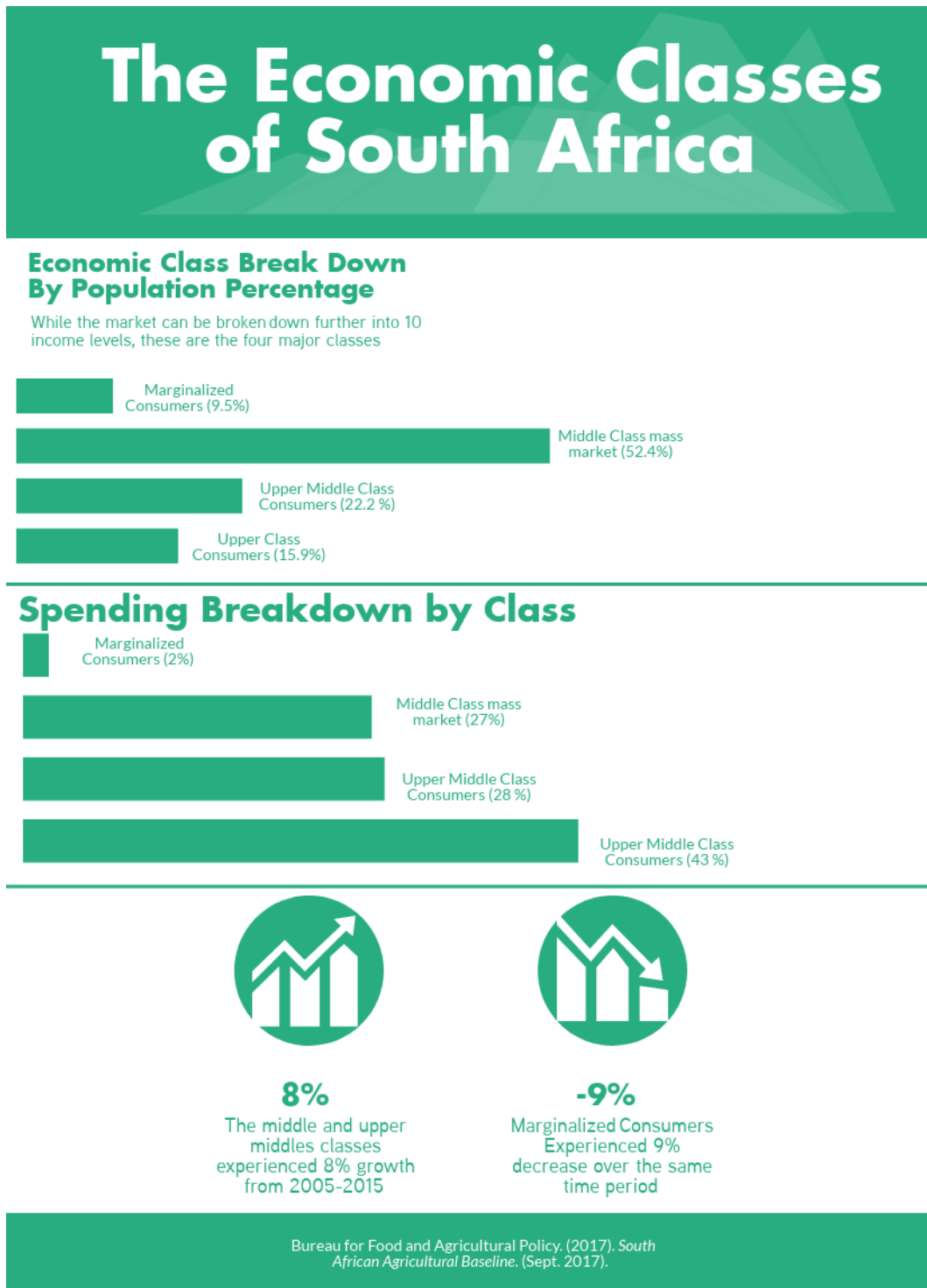
**Figure 7.** Thokozani’s original label and the altered Ovation label (Thokozani, 2017; Woolworths, 2017).

## **The changing domestic market and unexplored components of consumer-brand identification**

The branding strategy implemented by African Roots Wine Brands is a technique companies like Women in Wine are often told to utilize by industry professionals if they want to be considered a high-end wine (McLean et al., 2016). However, little research has been conducted on how consumers identify with specific wine brand traits. Additionally, it is unclear how factors like race, gender, and nationality (South African vs other) play into consumer-brand identification (CBI) with wine brands.

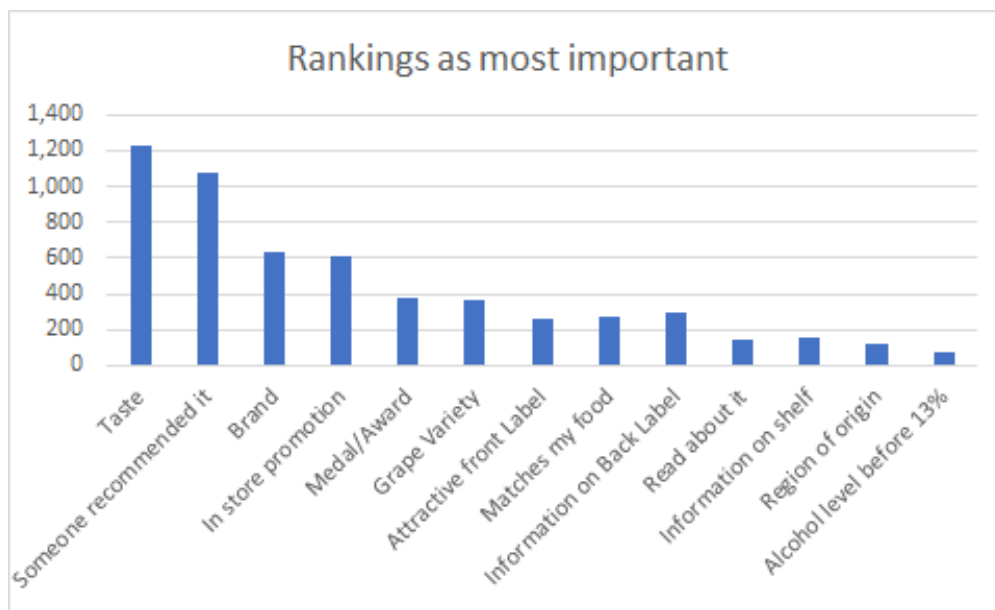
Further complicating this understanding is a drastically changing South African consumer market. Figure 8 shows that from 2005-2015 the middle classes experienced an 8% growth, while the lowest economic bracket experienced a 9% decrease over the same period (Bureau for Food and Agricultural Policy, 2016). Given that the lower bracket had been predominantly black, this has resulted in a substantial increase in the number of black individuals in the middle class (Van Rooyen et al., 2010). According to Van Rooyen and colleagues (2010), the growth of the new black middle class has actually been “the most powerful market trend in the South African economy in the last 10 years” (p. 293). As the middle class accounts for 55% of the total expenditure by South African consumers (Bureau

for Food and Agricultural Policy, 2016), creating a product that middle class consumers can identify with could open access to a significant portion of the market.



**Figure 8.** Middle Class Expansion Chart (Bureau for Food and Agricultural Policy, 2016).

However, there is limited knowledge about the motivations that influence wine consumption within this changing market. A recent study attempted to identify some of these motivations by surveying 600 South African university students regarding the importance of 13 different wine attributes (Lategan, Pentz, & du Preez, 2017). Consumers ranked ‘taste’ as the most important attribute of a wine, followed by ‘recommendations from others’ and ‘reputation of the brand’ (see Figure 9).



**Figure 9.** Ranking of wine attributes by South African University students (Lategan et al., 2017).

Placing a high value on brand might suggest that consumption is used to elevate one’s social standing (i.e., status driven; Lategan et al., 2017). This is supported by other market research in South Africa that found that consumption was, indeed, status driven, especially among the middle-class (Chevalier, 2015). In addition, research indicates that the newly emerging black middle class is also concerned with status (Van Rooyen et al., 2010). These findings suggest that brand prestige could be an important driver in consumer-brand identification within the wine industry. However, it is unclear if this is the only driver that is important in consumer-brand identification within the wine industry or if any of the other five drivers play key roles.

This project aimed to examine what drivers motivate consumer product selection within the wine industry. In addition, the project investigates how South African consumers choose wines based on their label characteristics as this has been shown to be an important factor in product selection within the wine industry (Sherman & Tuten, 2011). By understanding the drivers and label characteristics that motivate wine consumption among

South African consumers can help lesser known South African wine producers, such as the newer black and/or female owned producers like Women in Wine, increase their presence within the domestic wine market.



# Methods

This project was designed to provide evidence to support Women in Wine's understanding of domestic consumption of South African wine. This project was broken down into three objectives:

1. Assessing the perceptions of industry professionals (producers, marketers, and buyers) on consumer-brand identification and its influence on marketing strategies.
2. Exploring which drivers of consumer-brand identification are prevalent in the consumption of wine.
3. Examining how gender, race, and nationality traits depicted on wine labels influence domestic consumption of wine.

## **Objective 1: Assessing the perceptions of industry professionals (producers, marketers, and buyers) on consumer-brand identification and its influence on marketing strategies**

### *Interviews with wine producers*

To accomplish Objective 1, we conducted semi-structured interviews with five South African wine producers in the Stellenbosch and the Western Cape Province to gain an understanding of how they market wine and where their brand stands in relation to other brands. We chose semi-structured interviews because they strike a balance of asking a set of predetermined questions to give interviewees guidance on areas to explore thematically, while also allowing the interview to explore in-depth topics of importance (Chadwick, Gill, Stewart, & Treasure, 2008). This form of interviewing also gave us the freedom to tailor the questions depending on the person and the conversation flow. For our research, this method was best suited for us to collect data of the different marketing plans that producers utilize when targeting to desired consumers. We examined the different marketing approaches of these various producers. Listed below are representatives of new wine producers. Understanding the perspectives of new and established producers was essential to assessing how different players in the wine industry market themselves within South Africa.

At each interview at least two members of the research team were present. Handwritten notes were taken, and all interviews were audio recorded using a smartphone, unless the interviewee requested not to be recorded. Each interview lasted approximately an hour. Verbal consent was obtained before each interview. We were given contact information of these individuals through Beverly Farmer. All interviewees agreed to have their name published in this final report (Table II).

Name	Organization
Beverly Farmer	CEO Women in Wine
Thembi Tobie	CEO Thembi & Co. Wines
Bonny Van Der Merwe	Marketing Executive, Bayede! Royal Selection
Nondumiso Pikashe	CEO Ses'fikile Wines
Vivian Kleynhans	CEO African Roots Wine Brands
Denise Stubbs	Director, Business Development / HR Manager at Diemersfontein Wine and Country Estate/ Thokozani Wines and Hospitality

**Table II.** Name and occupation of industry producers

#### *Interviews with other industry professionals*

To further understand industry perceptions of new wine companies, we interviewed five key individuals working in organizations involved in the South African wine industry. These interviews are valuable to wine producers, as they inform new producers how to best market their wines domestically and internationally. Interviews focused on obtaining a holistic understanding of the industry, basic marketing decisions, government interventions, and consumer-brand identification. In addition, we discussed the interviewees' role within the industry and how their position influenced their perception on trends of the wine market as well as emerging, black, and female owned brands. Understanding basic marketing perceptions was key to knowing how producers are advised to sell their wines. Questions regarding government initiatives were designed to gain an understanding of how professionals view the government and what actions the government has taken to aid transformation in the industry. While questions about consumer-brand identification did not explicitly mention the six drivers of CBI, they were intended to guide discussion toward CBI in general.

In the interviews with label designers, questions focused on marketing labels of wine, such as the particulars that go into label design. We discussed the challenges of changing a label design to better target consumers in terms of Old or New World style labels. We asked questions concerning specific consumer segments and how label designers understand the domestic wine market. We sought to understand how label designers capture the story of the brand while conveying a strong label that may drive CBI.

We chose the semi-structured interview method when speaking with the marketers and professionals, because it offers flexibility in conversation (Chadwick et al., 2008). Like interviews with producers, all interviewees were asked to provide verbal consent. Handwritten notes were taken and the interview was recorded on a smartphone if we obtained consent. See Table III for a list of wine marketers and industry professionals interviewed.

Name	Organization
Yvette Van der Merwe	Executive Manager, South African Wine Industry Information Systems (SAWIS)
Matome Mbatha	Market Manager, Wines of South Africa (WOSA)
	Fanakalo Designs
Eddie Hauman and Suzanne Naude`	Haumann Small Design Group
Unathi Mantshongo	VinPro Transformation and Development Officer

**Table III.** Name and organization of marketers and professionals

## **Objective 2: Exploring which drivers of consumer-brand identification are prevalent in consumption of wine**

### *Survey of Wine Consumers*

To test the effects of identified drivers of consumer-brand identification on wine consumption, we modified an existing survey instrument developed by Stokburger-Sauer and colleagues (2012), as discussed previously (see Table I). This survey tested the relationships of the six drivers of CBI as they relate to wine consumption by prompting participants to consider the wine brand they purchase most often and then asking the participant to consider how the six drivers: brand-self similarity, brand distinctiveness, brand prestige, brand social benefits, brand warmth, and memorable brand experiences play a role in the purchasing of

wine. The survey was developed online using Qualtrics. Because the questions were already validated, pilot testing involved assessing the functionality of the survey and used an accessible student group. In order to obtain a sufficient sample size for this survey, the survey was first sent out on Amazon Mechanical Turk (M-Turk). The survey was originally set up on M-Turk to limit the participants to South Africans, but due to a lack of responses the survey was opened up to US participants. A total sample of 102 US participants (58% male; 78% white, with an average age of 35.98) was obtained through Amazon M-Turk.

Using the IBM Statistical Package for the Social Sciences (SPSS), we conducted a Pearson's Correlation test to determine the relationships between the drivers and CBI. A linear regression analysis was then conducted using the same software to assess the predictive value of the different CBI drivers.

### **Objective 3: Examining how gender, race, and nationality traits depicted on wine labels influence domestic consumption of wine**

#### *Paired Comparison*

Paired comparisons were conducted to understand initial identification with wine based on characteristics displayed on the label (Johnson, Weller, & Brewer, 2002). In particular, we were interested in understanding how participants viewed labels that reflected the New and Old World style and conveyed qualities of gender and nationality (South African vs other) characteristics. We chose these categories as these are the traits highlighted by Women in Wine's brand imagery. The aim was to test whether the domestic consumer is attracted to a certain combination of these traits based on their own identity. To accomplish this, we chose four labels with distinct characteristics of Old World style and four labels with distinct characteristics of New World style. Within each of these four labels, one label predominantly conveyed masculinity, one conveyed femininity, one conveyed South African characteristics, while the last was meant to be neutral, not conveying any particular characteristic (Figure 10).



**Figure 10.** Labels used in paired comparison activity

Images of wine labels that conveyed these different characteristics were presented as pairs for participants to select the label they would most likely buy. Since there were eight labels in the pairing, participants completed 28 paired comparisons over the course of the task. Two investigators were present during the paired comparison task. The participants were provided an iPad to conduct the task on the Qualtrics platform. The pairs were randomized for each participant. At the end of the paired comparison, participants provided demographic information, including race, age, gender, and nationality. Participants also indicated their familiarity with wine on a 7-point Likert-Type scale (1 = Not At All Familiar; 7 = Very Familiar). The familiarity scale measures the influence of consumers choice by their knowledge of wine. Demographic information was used to determine if individual characteristics (race, age, gender, nationality, familiarity) influenced the participant’s label preferences (Table V). While data on initial impressions of the labels were provided through this exercise, we aimed to clarify responses through semi-structured interviews.

The responses to the paired comparison selections were analyzed using sum scores. Scores of ‘1’ were assigned as seen in Table IV below, focusing on one label trait, such as South African traits compared to the rest. Separate analysis of variance (ANOVA) tests were conducted to assess if variations in sum scores for specific traits were influenced by demographic characteristic (gender, race, nationality, age). All analyses were conducted using MyStat statistical software.

Trait	Scoring
New World style versus Old World style	New World=1, Old World=0
South African traits versus Feminine, Masculine and other	South African=1, Others=0
Masculine versus Feminine, South African and other	Masculine=1, Others=0
Feminine versus South African, Masculine and other	Feminine=1, Others=0

**Table IV.** Strategy applied to calculate sum scores used in the Paired Comparison analysis.

Based on current literature exploring wine consumption patterns, we developed three testable hypotheses specific to the wine label characteristics that are present in the Women in Wine label (New World style, South African, feminine):

- Hypothesis 1: Consumers prefer Old World style labels over New World style labels, with no variation by race, gender, or nationality.
  - Hypothesis 1a: Younger consumers prefer New World style labels over Old World style labels.
- Hypothesis 2: Race and nationality predict preferences for South African traits.
  - Hypothesis 2a: Greater familiarity with wine further influenced this dynamic, with people more familiar selecting South African traits.
- Hypothesis 3: A preference for feminine traits is predicated on consumer gender.

#### *Interviews with Consumers*

After completing the paired comparison, two investigators engaged consumers in a 6-7-minute discussion on why the consumer identified with the label. Consumers were also asked about the qualities that drive personal wine purchasing decisions to examine how wine purchases reflect consumer-brand identification. After conducting these interviews it became clear that the length of the paired comparison was detracting from the willingness of some participants to continue with an exploratory follow-up conversation. As such, in an effort to improve the productivity of these interviews, we presented only the eight wine labels and immediately proceeded with the interview, without a paired comparison. Demographic details were still collected. Hand-written notes were taken during these interviews. Consumer interviews were analyzed to identify key themes.

### *Sample*

Fifty-nine individuals (24 men, 24 women, and 1 other) completed a paired comparison task with a follow up interview. Of these participants, 25 individuals identified as white (12 men, 12 women, and one person with gender listed as other), and 24 individuals identified as black or coloured (12 men and 12 women). All participants were 18 years or older (legal South African drinking age). Additionally, 12 individuals completed the interviews without the paired comparison. Demographic indicators are detailed in Table V.

	Paired Comparison	Paired Comparison with interview	Interview only	Stellenbosch		Cape Town Biscuit Mill
				(CBD)	Stellenbosch Square Mall	
<b>Race</b>						
White	30	37	7	11	2	15
Blacks	29	34	5	12	5	10
<b>Gender</b>						
Male	28	34	6	12	3	10
Female	31	37	6	10	4	15
<b>Nationality</b>						
S. African	49	61	12	21	7	19
Other	9	9	0	1	0	6
<b>Age</b>						
<25	28	39	11	13	1	13
25-35	23	24	1	6	5	8
>35	6	6	0	1	1	4

**Table V.** Participant demographics indicating method of engagement and location of interview.

To get a diverse understanding of consumer segments, we interacted with consumers in the local Stellenbosch central business district (CBD), Stellenbosch Square, Stellenbosch University (Figure 11), and the Old Biscuit Mill in Woodstock (in Cape Town). The Stellenbosch CBD specifically around southern Bird Street (highlighted in Red on Figure 11) is a popular area for consumers who use public transportation as it is close to a taxi station, a common characteristic of black consumers (Venema, 2016). The Eikestad Mall (also located on Bird Street) attracts a diverse consumer population based on race, gender, and age. Stellenbosch Square is most accessible by private car, enabling us to interview consumers of a higher economic status, a common characteristic of white consumers (Venema, 2016). We targeted consumers at Stellenbosch University to get a younger age group, as university students are typically between the ages of 18-25. Finally, the Old Biscuit Mill is a Saturday market, frequented by both South Africans and tourists. Collectively, these locations allowed us to get a more diverse consumer sample.



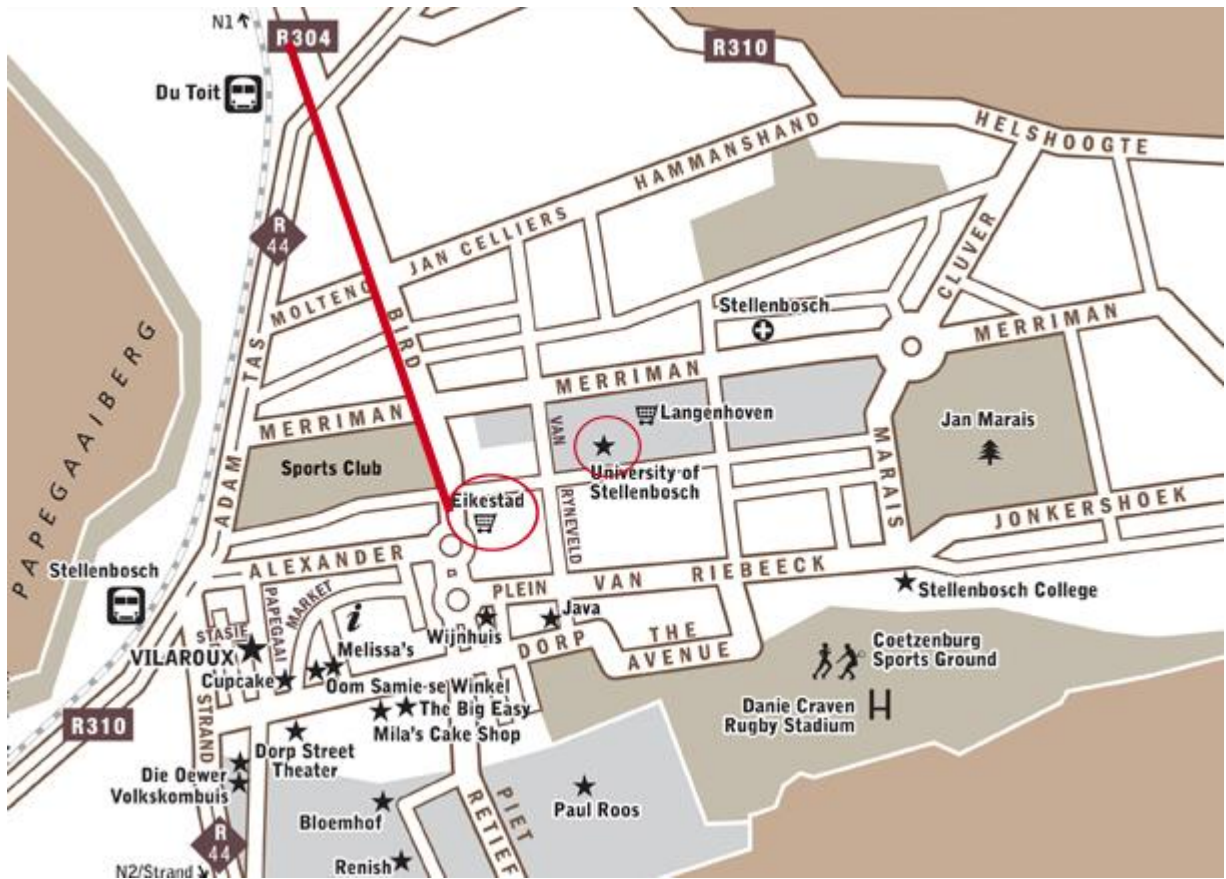


Figure 11. Location of Stellenbosch CBD, Bird Street (Eikestad Mall), and Stellenbosch University (Vilaroux, 2017).

# Key Findings

## **Objective 1: Assessing the perceptions of industry professionals (producers, marketers, and buyers) on consumer-brand identification and its influence on marketing strategies**

Saturation of the local market has kept many new producers from being able to grow their presence domestically. According to Kevin McKay, manager of Market Liquors in Stellenbosch, with over 2,200 brands of wine in South Africa, new producers entering the market (especially the entry-to-mid range market) encounter significant competition, and this competition has only increased in the past 10 years. Another hindrance is that established brands of South Africa control most of the market because consumers are more familiar with the established brands, suggesting greater brand prestige (and consumer-brand identity), and this leads to brand loyalty and commitment. Matome Mbatha, Market Manager, Wines of South Africa explained that established brands, such as Fairview, have built up brand prestige with their establishment and this enables them to keep a consistent consumer base. Mbatha mentioned that “anything [Fairview] touches, you’re bound to get quality,” and this then entices consumers to buy their wine. Because established producers, like Fairview, have had time to develop brand prestige, it makes it difficult for new producers to compete on the same level. For example, Vivian Kleynhans, CEO of African Roots Wine Brands, spoke of her struggles in entering the domestic market. She describes how despite her consistent efforts over 13 years, many grocery and liquor stores will not put her product on their shelves. The reason given was always that her wines were “not well enough known,” so it would not be in the best interest of the store for them to stock the Seven Sisters brand. By not being on store shelves, Kleynhans noted, it has been harder to develop consumer-brand identification with her product because consumers are not even aware her product exists. To counteract this, the industry professionals we spoke to recommended that new wine producers conduct brand building exercises to increase awareness of the brand. Brand building exercises could also help increase brand warmth, brand distinctiveness, or brand social benefits which are key drivers in predicting consumer-brand identification in wine.

However, many new producers expressed that holding brand building exercises is difficult to do when they do not have land or a venue to host consumers. While government policies are in place to help new producers successfully enter and establish themselves in the market, new producers feel that current government policies are not sufficient. New producers feel that acquiring land is an important component of establishing themselves and will help in the long run to develop brand prestige. As expressed by Kleynhans, of African Roots, new producers see land as an opportunity to open a venue for their wines and work to create a dedicated consumer base. Kleynhan opened her venue for African Roots in 2016, and believes that despite still sourcing most of her grapes from other farms, the land will, over time, enable her to establish brand prestige. In addition, she believes that the experiences consumers have when visiting her venue can help build brand warmth and memorable brand experiences.

However, many producers, such as Thembi Tobie of Thembi Wines, have been on government developed land remittances wait lists for over a decade and have yet to acquire land. Frustrated with the situation, Tobie described how politicians act like land is important to them but in reality it is “low on their radar” (T. Tobie, personal communication, November 2, 2017). Tobie also described how not having land has kept her back from building consumer-brand identification: “The whole world is coming here [for Cape Wine 2018]<sup>3</sup>, [but], where am I going to host my brands . . . it would be nice to host them, make them come, taste the wine.” Beverly Farmer, Nondumiso Pikashe of Ses’fikile wines, and Vivian Kleynhans of African Roots expressed similar frustrations.

However, the issues surrounding land ownership seem unlikely to be resolved anytime soon as Yvette Van Der Merwe of the South African Wine Information Systems (SAWIS), explained that it takes about 50 hectares of land to become “economically viable,” and that the government providing assistance to all new producers is unlikely. Van Der Merwe, further expressed that while there is a “round table” for new producers to convey their concerns to government representatives, this only indicates that “the coming together is there, but the deliverance [from the government] is not.” When asking Van Der Merwe if something might happen soon to mitigate frustrations, she shook her head in remorse reminding us that because the wine industry is an alcohol driven industry the government has a hard time supporting it.

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<sup>3</sup> South Africa’s biggest wine platform; a three day event in September 2018.

In contrast to the struggles of entering the domestic industry, many new producers are finding success by exporting their products overseas. Thembi Wines, Ses’fikile, Bayede Wines, Seven Sisters, and Women in Wine have entered international markets in the United States, Scandinavia, and China, believing that international consumers identify with their products due to brand warmth and brand social benefits. It was often said by producers that consumers feel good about buying black owned brands because they are becoming “part of the greater good” (T. Tobie, personal communication, November 2, 2017).

## **Objective 2: Exploring which drivers of consumer-brand identification are prevalent in the consumption of wine.**

*Reliability of driver and CBI items.* As the CBI driver items were already validated in a previous study (Stokburger-Sauer et al., 2012), we expected that the items in our survey would also be reliable. However, prior to conducting further analysis and creating the composite scores for each driver and CBI, we conducted a reliability analysis on the items making up each driver. The reliability analysis confirmed that items making up each driver and CBI were reliable (see Table VI for Cronbach alpha scores). Since the items were reliable (all high alpha scores), composite scores of each driver and CBI were calculated by averaging the responses for the items that measured each driver. The only exception to this was the brand-self similarity composite. For this composite, a difference score was computed by subtracting self-similarity from brand similarity to get a sense of how much overlap there was between self and brand similarity ratings. A score of ‘0’ indicated that there was complete overlap between self and brand ratings, and indicated a high sense of self-brand similarity. The difference score intervals were then rescaled to be on a 7-point Likert-Type scale (1 = Very Similar; 7 = Very Dissimilar) to be consistent with the measurement of the other five drivers (adapted from Stokburger-Sauer et al., 2012). The interval coding scheme was:

.0 to .1 (and -.1 to 0) = 1 (very similar)

.2 to .3 (and -.3 to -.2) = 2

.4 to .5 (and -.5 to -.4) = 3

.6 to .7 (and -.7 to -.6) = 4

.8 to .9 (and -.9 to -.8) = 5

1 to 2 (and -1 to -2) = 6

Greater than 2 (and less than -2) = 7 (very dissimilar)

Variable	Alpha Score
CBI	.96
Similarity Brand <sup>4</sup>	.93
Similarity Self	.90
Distinctness	.88
Prestige	.93
Social Benefits	.90
Warmth	.79
Memorable brand experiences	.92

**Table VI.** Cronbach alpha scores of each driver and consumer-brand identification construct. Scores closer to 1 indicate higher reliability.

*Correlation between each driver and CBI.* First, we examined the relationship between each driver and CBI. A Pearson's correlation analysis reveals a significant positive correlation for each driver with CBI (see Table VII). The correlations between brand warmth ( $r = .64$ ), brand social benefits ( $r = .68$ ), brand prestige ( $r = .68$ ), and brand distinctiveness ( $r = .59$ ) were strong correlations, being above  $r = .5$ . The correlations between brand-self similarity ( $r = .35$ ) as well as memorable brand experiences ( $r = .46$ ) were moderate in nature.

Variable	<i>r</i>
Warmth	.64
Social benefits	.68
Memorable brand experiences	.46
Distinctiveness	.59
Prestige	.68
Similarity	.35

**Table VII.** Pearson's Correlation analysis between the drivers and CBI.  $n=102$  for all variables. All drivers were significant at  $p < .005$

<sup>4</sup> Brand-self similarity was measured by two different constructs: Brand similarity and self-similarity.

*Regression analysis of each driver predicting CBI.* Correlation alone does not indicate the directionality of the relationship between the drivers and CBI. As such, a linear regression analysis was conducted. The results of the regression revealed that the six drivers explained 63% of the variance ( $R^2 = .63$ ,  $F(6,101) = 26.74$ ,  $p < .01$ ), indicating that the model is a good fit for data. However, not all six drivers independently and significantly predicted CBI. Brand social benefits significantly predicted CBI ( $\beta = .28$ ,  $p = .004$ ), as well as brand prestige ( $\beta = .26$ ,  $p = .001$ ) and brand distinctiveness ( $\beta = .25$ ,  $p = .045$ ). Brand warmth ( $\beta = .18$ ,  $p = .077$ ) marginally predicted CBI. Both memorable brand experiences ( $\beta = .01$ ,  $p = .892$ ) and brand-self similarity ( $\beta = .05$ ,  $p = .356$ ) did not predict CBI. These findings differ from those of Stokburger-Sauer and colleagues. In their study, brand prestige did not predict CBI. This indicates a difference in predictive drivers in wine consumption as compared to other products.

Variable	Unstandardized Coefficients B	Unstandardized Coefficients Std. Error	Standardized Coefficient Beta	P
Prestige	.26	.08	.29	.001**
Social benefits	.30	.10	.28	.004**
Distinctiveness	.21	.10	.17	.045**
Warmth	.24	.13	.18	.077*
Similarity	.05	.05	.06	.356
Memorable brand experiences	.01	.01	.01	.892

**Table VIII.** Linear regression analysis for the drivers and CBI. Note: \*\* indicates significant predictive value where  $p \leq 0.05$ , \* indicates significant predictive value where  $p \leq 0.10$

### **Objective 3: Examining how gender, race, and nationality traits depicted on wine labels influence domestic consumption of wine**

*Hypothesis 1: Consumers prefer Old World style labels over New World style labels with no variation by race, gender, or nationality.*

*Hypothesis 1a: Younger consumers prefer New World style labels over Old World style labels.*

Analysis of paired comparisons indicated that 68% of participants selected an Old World over a New World style label. ANOVA tests reveal that there was no significant difference in the preferences for Old World style compared to New World style labels based on the consumer's race ( $F(1, 56) = .07, p = .79$ ), gender ( $F(2, 55) = .93, p = .40$ ), or nationality ( $F(1, 56) = 2.14, p = .15$ ), see Table IX. In addition, age of the consumer did not influence preferences ( $F(2, 54) = .60, p = .5$ ).

Hypothesis 1. Old vs New World Styles		<i>N</i>	<i>M</i>	<i>SD</i>	<i>F</i>	<i>p</i>
Race	White	30	5.60	3.37	0.07	0.79
	Black	28	5.82	2.98		
Gender	Male	27	5.11	2.94	0.93	0.40
	Female	30	6.20	3.36		
Nationality	South African	49	5.50	3.16	2.14	0.15
	Other	9	7.11	2.93		
Age Categories	<25	28	5.32	3.24	0.60	0.53
	25-35	23	5.87	2.93		
	>35	6	6.83	4.12		

**Table IX.** ANOVA descriptive and inferential statistics for Old versus New World label preferences based on consumer demographics (\* indicates  $p < .05$ )

We talked with participants to better understand what influenced their wine label preferences and asked them to describe the different labels they viewed, revealing words such as “elegant,” “vintage,” and “classic” for Old World style labels (see Figure 12). These descriptors support findings from the CBI survey, indicating the importance of brand prestige influencing consumer preferences. These findings are summed up by a consumer who pointed out the year that one brand was established [1699, DeMorgenzon], noting that it indicated “the guarantee [consumers] are buying a well-made product.”



**Figure 12.** Frequency word cloud to describe Old World style labels based on 71 interviews (59 paired comparisons and 12 additional semi-structured interviews)

New World style labels, on the other hand, were described as having “unique,” “eye catching,” and “clean” or “easy to read” designs. These descriptors relate to the brand distinctiveness driver. However, consumers also believed that the wines with the New World style labels were of a lower quality, “cheap,” and “easy to drink.” Cheap was not always viewed as a negative in nature, especially with younger university students who appreciated economical wines. Overall, consumers preferred Old World over New World style labels, and brand prestige seemed to be the motivating driver underlying this preference.

*Hypothesis 2: Race and nationality predict preferences for South African traits.*

*Hypothesis 2a: Greater familiarity with wine further influenced this dynamic, with people more familiar selecting South African traits.*

ANOVAs assessing the effect of South African traits (regardless if they were Old World or New World style) revealed that consumer nationality did not influence preferences for labels with South African traits ( $F(1, 56) = 2.090, p = .15$ ). However, race significantly influenced preferences for labels with South African traits,  $F(1, 56) = 4.14, p = .05$ , with



black consumers ( $M = 6.2, SD = 2.1$ ) preferring labels with South African traits more than white consumers ( $M = 5.1, SD = 2.1$ ). Consumer gender also significantly influenced South African trait preferences,  $F(2, 55) = 4.50, p = .02$ ; with male consumers ( $M = 6.4, SD = 2.4$ ) preferring labels with South African traits more than female consumers ( $M = 4.9, SD = 1.7$ ). There was no statistical significance by age group,  $F(2, 54) = .64, p = .53$ .

Accounting for the possible effect of familiarity with wine on the relationship, we assigned measures of ‘familiarity with wine’ as a covariate in ANOVA tests assessing nationality. For the purposes of the demographics questionnaire, see Appendix 1, familiarity with wines was based on a scale of 1 to 7, with 1 being “not at all familiar” and 7 representing “very familiar.” This scale was simplified into a scale of 1 and 2, 1 being “not familiar” and 2 “familiar.” The scale of 1 included (1, 2) and 2 included (4, 5, 6, 7) from the original scale. The median value was determined to be 3 and was removed from the range. Preference for South African traits were not significantly influenced by nationality,  $F(1, 46) = 3.099, p = 0.085$ , when controlling for familiarity with local wines,  $F(1, 46) = 2.829, p = 0.099$ . Many of our black consumers we interviewed stated they were not wine drinkers, so we conducted the test with familiarity as a covariate, but replaced nationality with race. Preferences for South African label traits were not influenced by race,  $F(1, 46) = 2.917, p = .094$ , and familiarity with local wines,  $F(1, 46) = .700, p = .407$ .

Hypothesis 2. African Label traits						
		<i>N</i>	<i>M</i>	<i>SD</i>	<i>F</i>	<i>p</i>
Race	White	30	5.07	2.05	4.14	0.05*
	Black	28	6.18	2.11		
Gender	Male	27	6.44	2.36	4.50	.02*
	Female	30	4.90	1.65		
Nationality	South African	49	5.78	2.11	2.09	0.15
	Other	9	4.67	2.12		
Age Categories	<25	28	5.64	1.85	0.64	0.53
	25-35	23	5.78	2.68		
	>35	6	4.67	0.82		

**Table X.** ANOVA tests, examining the difference in mean sum score values for the South African label traits compared to all other label traits (feminine, masculine, and neutral) (\* indicates  $p < .05$ )

In our follow-up conversations with consumers, black consumers stated an appreciation for the South African identity in the label designs, such as the African animals in the crest (Demorgenzon), the depiction of the African continent (Cape Dreams), or knowing the wine was produced in South Africa or locally in Stellenbosch. Consumers indicated that they preferred labels with South African traits because they felt it represented them and their national identity. These sentiments align with the brand self-similarity driver that is related to CBI but not a strong predictor of it. Consumers also described how the images of South Africa were inviting to them, suggesting the brand warmth driver may also play a role in these preferences. Our conversations also revealed that many black consumers were interested in the mission of the brands and associated the labels with South African traits to companies that give back to the local community. This suggests that the South African traits on wine labels may also invoke the social benefits driver as consumers might prefer the labels because it would elevate them in comparison to their peers because they purchased wine that supports local communities.

*Hypothesis 3: A preference for feminine traits is predicated on consumer gender.*

ANOVA analyses were conducted to examine preferences for feminine labels. Consumer gender did not influence preferences ( $F(2, 55) = 2.885, p = .06$ ), neither did nationality, ( $F(1, 56) = .459, p = .50$ ), nor consumer race ( $F(1, 56) = .057, p = .81$ ). However, age did influence preferences for feminine labels,  $F(2, 54) = 3.18, p = .05$ . Consumers over the age of 35 preferred feminine labels the most ( $M = 8.2, SD = 2.3$ ), see Table XI. ANOVA analyses were also conducted with sum score of preferences for masculine labels (regardless if they were Old World or New World style) as the dependent measure. See Table XI for descriptive and inferential statistics. Gender did not influence preferences for masculine labels ( $F(2, 55) = .208, p = .81$ ), neither did nationality, ( $F(1, 56) = .001, p = .97$ ), nor consumer age ( $F(2, 54) = .934, p = .40$ ). However, race did influence preferences for masculine labels,  $F(1, 56) = 15.84, p < .001$ . White consumers ( $M = 6.0, SD = 2.2$ ) preferred masculine labels more than black consumers ( $M = 3.6, SD = 2.3$ ).

Hypothesis 3. Gender Label						
Feminine trait		<i>N</i>	<i>M</i>	<i>SD</i>	<i>F</i>	<i>p</i>
Race	White	30	6.00	2.21	15.84	0.000*
	Black	28	3.64	2.30		
Gender	Male	27	4.63	2.31	4.50	0.81
	Female	30	5.07	2.78		
Nationality	South African	49	4.86	2.50	0.00	0.97
	Other	9	4.89	2.85		
Age						
Categories	<25	28	5.18	2.07	0.94	0.40
	25-35	23	5.00	2.95		
	>35	6	3.67	2.07		
Masculine trait						
		<i>N</i>	<i>M</i>	<i>SD</i>	<i>F</i>	<i>p</i>
Race	White	30	5.07	2.05	4.14	0.05*
	Black	28	6.18	2.11		
Gender	Male	27	6.44	2.36	4.50	.02*
	Female	30	4.90	1.65		
Nationality	South African	49	5.78	2.11	2.09	0.15
	Other	9	4.67	2.12		
Age						
Categories	<25	28	5.64	1.85	0.64	0.53
	25-35	23	5.78	2.68		
	>35	6	4.67	0.82		

**Table XI.** ANOVA tests, examining the difference in mean sum score values for the Feminine and Masculine label trait compared to all other label traits (South African, neutral and opposite gender trait)

Note: \* indicates significant difference where  $\alpha \leq 0.05$ .

# Discussion

This project investigated how identity influences consumer wine preferences in South Africa in an effort to enhance the understanding of market drivers for new producers. From interviews with industry professionals, a survey on CBI, and assessing label preferences, we identified four key drivers that influence consumer-brand identification in the wine industry: brand prestige, brand social benefits, brand distinctiveness, and brand warmth. Relating our findings to previous work on CBI (Stokburger-Sauer et al., 2012), we found that brand prestige was a key driver for wine CBI. In addition, brand self-similarity and memorable brand experiences were not significant predictors of CBI in the wine industry, unlike other products. These distinctions reveal that wine is a unique product that should be investigated to determine what drivers predict consumer purchasing behaviors.

Brand prestige was identified by industry professionals as an important driver of CBI in the wine industry with the success of more established brands being driven by it. In addition, discussions with industry professionals and also consumers revealed that a wine label can depict brand prestige if an Old World style label is used. New producers, therefore, need to develop brand prestige in order to compete in an already saturated market. One approach to tackle this would be to develop an Old World style wine label to convey brand prestige.

In some ways, brand social benefits is related to brand prestige as consumers will choose brands that will help elevate their social status. Since Old World style labels are associated with more established and high quality producers, consumers often pick wines with Old World style labels to help elevate their social standing. However, brand social benefits also come into play when consumers want to feel like they are doing something that is beneficial to society. If new producers can promote their efforts to expand inclusivity of the industry, then consumers may identify more with their brand.

Another driver that new producers could have success with is brand distinctiveness. Our interviews with industry professionals revealed that the market is currently saturated, so brands need to find a way to be distinct or stand out. One way of doing this is to have a unique label so the bottle stands out on the shelf. New producers may be able to tap into consumer perceptions of New World style labels being perceived as unique. New World style labels are perceived to be unique by consumers meaning that new producers may be able to

tap into that perception and produce a label that is distinct. Analysis of paired comparisons revealed that black consumers particularly preferred labels with South African traits, so black-owned brands should highlight their South African identity on their labels to market to the expanding middle class.

In addition, industry professionals suggested that brand warmth was the driver behind the success of new wine labels in international markets. Likewise, our interviews with consumers suggested that labels that have South African traits were also viewed as being warmer and more comforting. Thus, new producers can elicit brand warmth by again highlighting their South African identity.

While many producers commented on the importance of owning land as a part of growing their brand, our findings indicate that land would only serve as a tool in growing a brand if it is used to facilitate the development of the four drivers to CBI in wine consumption. Owning land and hoping that people visit and have a good time is not enough to create CBI, since the survey indicated that memorable brand experiences were not predictive of CBI within the wine industry. Instead, producers should focus on creating interactions that ensure that consumers develop an emotional connection when visiting the venue (brand warmth), feel like they are part of a special group by drinking the brand (brand social benefits), understand how the brand stands out from its competitors (brand distinctiveness), and get a sense of the quality and establishment of the brand (brand prestige). However, as we only surveyed US consumers, it is possible that memorable brand experiences may be important for South African wine consumers, especially those with ready access to vineyards.

While these four drivers predict CBI, we also found that label characteristics and consumer demographics can influence identification with wine. Our research suggests that Old World style labels will draw in consumers and that labels depicting South African traits will catch black and male consumers' eyes. Contrary to our predictions, the age of the consumer did not play a role in the type of label they preferred, unless it was a feminine label and then individuals older than 35 preferred this label the most. Nationality also did not predict label preferences; however, this finding is limited due to the small number of non-South African participants in the sample. Therefore, new producers need to think carefully about the characteristics on the labels they design for their products as well as the demographic they are targeting.

Another factor that could help black owned brands emerge into the domestic market is the implementation of a government intervention. For instance, a policy could be put in place that enables black owned brands an opportunity to have their wines on the shelves of grocery and wine stores in South Africa. Vivian Khelyans of African Roots and Beverly Farmer of Women in Wine, agree that some sort of government follow-up is needed to ensure black and female owned companies can get a chance at getting their wines onto the shelves in domestic markets. They believe that in addition to helping make brands more known, such policies may also aid in eliminating the belief that these new brands are lower quality and lack prestige.

One potential model is a government policy that requires stores to stock a certain quota of certified BEE brand wines. This idea stems from a policy enacted in the Canadian province of British Columbia, where wine and grocery stores are obligated to only sell local wine brands in order to promote local businesses (William-Ross, 2017). Another option, is to implement policies that protect the provenance of a product. This type of policy has been implemented in Italy, where a geographical indicator is placed on products from a specific origin in an effort to identify the attributes that are unique to that origin, such as cheese from the Parmesan region of Italy (Colombo & Prandin, 2017). This is done to protect companies and producers of specific origin and ensures products not from those specific places take advantage of the name or origin. To implement this in South Africa, Beverly Farmer, from Women in Wine, imagines a label that indicates it is made by a 'certified' BEE company.

In conclusion, removing the perception that New World, and particularly BEE brands, are lower in quality, has been difficult. However, this research reveals that if consumers identify with a product, they will be more likely to purchase it. Black South Africans identify with wine brands that display their South African identities. Given the growth in the black middle class, it is likely that continuing to market to this demographic will ultimately be a successful strategy for new BEE brands.

# Personal Reflections

## David Bovich



Leaving for South Africa after completing the ID 2050 proposal work in the United States, I had confidence our team was going to accomplish what we had proposed to do with the allotted seven weeks. With Professor Bulled and Skorinko's guidance and motivation, our work was going to be impressive. I couldn't wait to get our boots on the ground, meet our sponsor Beverly Farmer in-person and start with fieldwork. However, the first few days allowed me to think of the project in a different perspective. Meeting Beverly was inspiring. She is a woman with endless compassion and

determination, but also with a heart full of laughter and love; I immediately felt welcomed.

Meeting Beverly inspired me more about her mission, and I wanted to do everything I could with this project. As an academic project, the grade is an important factor, but accomplishing our goals for Beverly became the most important aspect for me. IQP isn't just an academically formative project; it is a personal transformation effort as well. Beginning professional interviews, revising the report, and planning the consumer interviews and paired comparison, I encountered difficulties in the project. I know I am hard worker, and I try my best, but throughout the project I fell short in some respects, especially articulating the project in writing and in meetings with Beverly and our advisors. I felt my contributions were not as strong as others, and I felt I was letting Beverly down. As we progressed towards consumer

interviews, our team had to overcome the challenge of speaking with strangers. This turned out to be one of my strengths. Fifty-nine paired comparisons and follow up interviews and an additional 12 consumer interviews later, I felt I had given a major contribution to the field work of the project, yet my writing and presentation of material still struggled. The data needed to be analyzed, so Professor Bulled put me in charge of data analysis, a significant aspect to the project. I was in a whole new world, learning MyStat with guidance of the advisors, running the tests and organizing and coding all the data. I never had exposure to statistics like this, and was very exciting to use in a real-world application. In addition to this, I drafted the findings for this section. Finally, I felt I was contributing enough to the project. I felt confident in meetings and the final presentation explaining what we had found and how the data connected to the wine industry. Looking back after seven weeks, I realized IQP exposed my strengths and weaknesses. I may not have been the best writer or presenter, but I was good at speaking with strangers and analyzing data and numbers, which appealed to my mathematical mind. IQP really broke me out of my comfort zone, and working with the data was something new yet familiar that I really enjoyed. As we finished writing the report, I felt confident we have made a significant contribution for Beverly, which regardless of my grades, is all I wanted personally out of the project.

Pictured above is myself hiking Jonkershoek Nature Reserve, a ten-mile hike that lasted about six hours. I always approach life with 110% effort, eager for new challenges. Like this hike, I knew IQP wasn't going to be easy from the start, yet I faced the challenges because I wanted to experience personal growth. I am thankful for the opportunity working with Beverly, and I will never forget her story and our Fridays exploring Stellenbosch and Paarl as a team. Seven weeks wasn't enough to experience South Africa, but Beverly's warm reception really made an impact.

## **Derek Kruzan**

By no means did I expect to come in here and solve the issues that plagued the South African wine industry, but at the very least I knew I wanted to help. I wanted to provide some insight into an issue that perhaps someone missed, or perhaps just present some information from an angle not yet explored. It was a task that seemed fairly intimidating, because how would eight weeks worth of work stack up against a social issue that people have been trying to solve for the last 24 years? In the end I think we were able to provide numbers and analysis



of that data, so in that way we met our goal of providing the information we sought to our sponsor.

However, what I realized is that the numbers that we provided are not enough alone to make a difference. Numbers at their very essence are logical, but the issues we were dealing with, the systematic disenfranchisement of an entire group of people, is anything but logical. Why then, would anyone who perpetuates the issue listen to logic? That being said, I do believe that this industry will change, and when it does will be because of the Beverly Farmer's, the Vivian Kleyhans' and the Denise Stubbs', the heroes of this industry, not just some numbers. They've made sacrifices to get to where they are and will continue to make them until they accomplish what they know is right. While I know it comes down to the work that these women and others like them will do, if the data we provided from this project will in fact help them reach these goals, then what I and the rest of my team have done will have been worth it.

Beverly was especially inspiring, having seen her passion on a regular basis. In one of our conversations she said something along the lines "Find a job that allows you to work on your passion... Because then it's incredible." At first this was seemingly just a weird way of wording the cliché "if you do something you love, you won't work a day in your life," but in reality it's more reflective of what she has really experienced. I've seen her work tirelessly, and to do that it has taken a toll. She's talked about missing time with her family, late night meetings, and long trips. She works so hard in an industry that is already difficult, knowing full well that because of her race she will have an even harder time, but regardless of all that she keeps working to help others because she loves it and that is *incredible*.

For me I do not know yet what my passion will be, but Beverly and others like her have shown me what passion truly is. I've seen Beverly nearly brought to tears discussing how badly she wants to see transformation in the wine industry, and I hope that when I do find what I'm passionate about that it is something I can relate to as strongly as she clearly does to her cause.

## **Rose Lewis**

Upon receiving this project, I was unsure of where it would go and how it would turn out. Not knowing much about wine or South Africa made the idea of this project very daunting. When I was unsure of how things would turn out during ID 2050, I often went back

to why I was interested in this project in the first place: the empowerment of women.

Reflecting on my life so far, I have found recurring themes that I believe have shaped me immensely. The most profound being the constant reassurance of my worth and the power I hold. As the youngest girl to three older boys, I was constantly told how to make my voice heard and not be overlooked by others that have a socially constructed sense of entitlement. This taught me that my gender is not something that holds me back but a tool that can be used to question authority and challenge misconceptions.

My main reason for wanting to work with Beverly is because through her wine label she helps empower women of the wine industry who are often overlooked. Because of the societal issues surrounding the wine industry and South Africa in general, an immense number of women are not given the same opportunity to understand their worth like I was. In understanding my privilege, I wanted to use it in a way that could help Beverly and could, in turn, help these women who have not been given a fair chance.

Beverly has further strengthened me to believe in my abilities. Seeing her day to day fighting for gender and racial equality made me think beyond myself and made me realize even more the power that I hold.

When thinking about my future as a mechanical engineer, I see myself following in Beverly's footsteps. I do not envision myself constantly sitting at a desk or following typical job criteria. Rather, I hope to use my expertise, skills, and position as a STEM professional to enable young women and girls to understand their own worth and abilities. Like Beverly, I will seek to enable those disadvantaged by society by using my expertise of a typically male dominated industry.

## **Jennifer Payano**

On the first week, I meet my sponsor Beverly Farmer, a woman with a heart of gold. She juggled her life at home, the wine industry, and being part of the transformation team in South Africa. She quickly became a role model to me. Everywhere we went for the next 7 weeks, Beverly always expressed her love for the group with a warming smile; I felt at home with her. However, she also shared her frustration of the wine industry, explaining how many consumers perceive her wine to lack "authenticity." At first, I had no idea what she meant by authenticity, "*why would people even care who made the wine? Shouldn't they be thinking about the quality of the wine.*" I thought. But, after conducting industry professional

interviews later in the week, I got an understanding of what she meant. Being a female of colour, myself, I have always felt the need also to prove that what I have to offer, guarantees quality.



At the beginning of IQP, I wanted to feel more involved in many components of the project, that motivated me to put my first foot forward when it came to consumers interview. This was my strength in the project, and I absolutely loved every minute of it. I found a passion for talking to people about their perception of wine label. But, I think it went little deeper than that, I got to know how 71

consumers think and live. This experience has made me understand how much the wine industry impacts consumers life and why it was so important to Beverly.

Although, I was successful in consumers interview, I struggle in other aspects of the project. The first few weeks, we constantly needed to revise our report, schedule consumers interview (implied writing emails), and plan the consumer interviews. Because I thought I had poor writing and presentation skills I constantly put myself down, which slowly made me feel like I was letting my teammates and professors down. After having a group discussion with my team and professors, I got a clear understanding how I need to get better. I stayed at the lodge reading articles that will help me get a better understanding of the project. I sat down with my teammates trying to understand the data collected and how it all fits together. I started to contribute more to the project by helping write parts of the findings and discussion. Finally, doing all of this, helped me get a better understanding of the project.

IQP has drawn out my strengths and weaknesses. I learned that even though my writing can be poor, there are many different ways I can contribute to the project. I learned that I need to speak out if I didn't feel comfortable about how much work I was performing. After all, we are a team with the same goal in mind; provide Beverly with evidence on how to market her wine. As IQP is coming to an end, I feel confident that we have achieved our goal. I am very thankful for the opportunity I was given to meet such amazing people like Professor Bulled and Professor Skorinko whom for fourteen weeks pushed me to work hard.

Lastly, I am thankful for meeting my sponsor Beverly Farmer. Who took time out of her Friday's morning to show us Paarl and Stellenbosch. In addition, I will miss how much we relate to one another, "You would be throwing rocks with me" she would tell me. Meaning, like Beverly, I will and continue to go out of my way to seek change.

# Appendix A Methods

## Appendix 1: Paired Comparison

Demographics Questions:

1. What gender do you identify with?
  - a. Male
  - b. Female
  - c. Other
  - d. Prefer not to answer
2. What is your age in years?
3. What race do you identify with?
  - a. White
  - b. Black
  - c. Coloured
  - d. Asian
  - e. Hispanic-Latino
  - f. Multi-racial
  - g. Other
  - h. Prefer not to Answer
4. How familiar were you with the wines presented in the study (Scale 1-7 selection)
5. Are you a citizen of South Africa (Yes or No)
6. Do you live in South Africa (Yes or No)

## Appendix 2: Survey Questions

The survey we are using is modeled after a survey done by (Stokburger-Sauer et al., 2012) used to identify the drivers of consumer-brand identification.

Unless otherwise noted, the measures were assessed on 7-point Likert scales where 1=“completely disagree” and 7=“completely Agree.”

Brand X represents the brand of wine chosen by the surveyed consumers as the wine purchased most often. The survey prompts the user to write the brand they use most often and the name populates in the following questions.

### *Consumer–brand identification*

1. I feel a strong sense of belonging to Brand X.
2. I identify strongly with Brand X
3. Brand X embodies what I believe in.
4. Brand X is like a part of me.
5. Brand X has a great deal of personal meaning for me.

### *Brand-Self similarity*

Brand X is ... I am ... (answered for Brand X then about the consumer themselves)

1. Down-to-earth.
2. Honest.
3. Wholesome.
4. Cheerful.
5. Daring.
6. Spirited.
7. Imaginative.
8. Up-to-date.
9. Reliable.
10. Intelligent.
11. Successful.
12. Upper class.
13. Charming.
14. Outdoorsy.
15. Tough.

### *Brand distinctiveness*

1. Brand X has a distinctive identity.
2. Brand X is unique.
3. Brand X stands out from its competitors.

### *Brand prestige*

1. Brand X is very prestigious.
2. Brand X is one of the best brands of wine.
3. Brand X is a first-class, high-quality brand.

### *Brand Social Benefits*

1. Brand X offers me the opportunity to socialize.
2. I feel a sense of kinship with other people who consume Brand X.
3. I gain a lot from interactions with other consumers of Brand X.
4. Being a customer of Brand X makes me feel like I belong to a special group.

*Brand Warmth*

1. Brand X creates warm feelings among its users.
2. Brand X is very loveable.
3. Brand X is emotional rather than rational.

*Memorable brand experiences*

1. I have had a lot of memorable experiences with Brand X.
2. Thinking of Brand X brings back good memories.
3. I have fond memories of Brand X.

*Brand advocacy*

1. I like recommending Brand X to other consumers.
2. I love to talk about the good points of Brand X to people I know.
3. I have managed to convince other people to buy Brand X.

*Brand commitment*

1. I am very fond of Brand X.
2. I am very committed to Brand X.
3. I consider myself to be very loyal to Brand X.

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