

## **Filling up the sustainability glass: Wineries' initiatives towards sustainable wine tourism**

### **Abstract**

In considering various premises of stakeholder theory, this study enhances the understanding of sustainable practices among wineries offering wine tourism experiences. Face-to-face interviews carried out with winery owners-managers operating in three wine regions of emerging economies highlight adherence to the four pillars of sustainability at various levels, and reveal four key dimensions, each associated with the level of involvement in sustainable practices. Accordingly, the most fulfilling, the 'full-glass' dimension, illustrates observance to environmental, social, economic, and cultural sustainability. Several proposed frameworks illustrate conceptually and empirically the significance of the four pillars in the context of sustainable wine tourism.

**Keywords:** Sustainable wine tourism; sustainability; owners-managers; emerging economies; stakeholder theory.

### **Introduction**

For a number of years, sustainability has drawn the attention of tourism scholars (e.g., Cantele & Cassia, 2020; Saarinen, 2006; Timur & Getz, 2009), and "is perhaps the most prominent feature of contemporary tourism discourse" (Higgins-Desbiolles, 2010, p. 116). Arguably, this relevance is strongly associated with the significant environmental impacts of the tourism industry, notably, through consumption of water or energy (Babu, Kaur, & Rajendran, 2018).

Sustainability has been conceptualised in a myriad of ways (Vavra, 1996), for instance, "as a requirement of our generation to manage the resource base such that the average quality of life that we ensure ourselves can potentially be shared by all future generations" (Asheim, 1994, p. 1). Similarly, Stern (1995) conceptualises sustainability "as development that will give future generations opportunities equal to or greater than those of the present generation" (p. 53).

The wine industry, which represents the foundation and therefore a key ally in the provision of wine tourism experiences, has been confronted by a variety of issues highlighting challenges for its sustainability in the past decade (Sellers, 2016). For instance, competition in the global wine market has intensified (Alonso Ugaglia, Cardebat, & Jiao, 2019; Lorenzo, Rubio, & Garcés, 2018), requiring creativity, innovation, revisiting wineries' business model and incurring investments to remain competitive. From an environmental, social, and economic perspective, a study by Broccardo and Zicari (2020) found that wineries fall short from implementing these key sustainability markers. Also concerning is that wine tourism, an activity which among other aspects comprises visiting wineries and experiencing attributes of a wine region (Hall, 1996; Macionis, 1996), has been found to be the most carbon intensive element among all the phases of wine consumption and production (Sun & Drakeman, 2020).

At the same time, sustainability-related impacts can also be accrued through wine tourism-related activities. Indeed, sustainable inflows of visitor numbers to wine regions can contribute to the survival of numerous small and medium-sized winery operations, thereby supporting the social stability and cultural preservation of rural communities (Sun & Drakeman, 2020).

While a plethora of studies discusses sustainability in the domain of wine tourism (e.g., Baird, Hall, & Castka, 2018; Figueroa & Rotarou, 2018), few have considered the usefulness

and applicability of theoretical frameworks that could facilitate more in-depth insights, awareness, or discernment of sustainable practices, with direct ramifications for wine tourism delivery. Only recently, Duarte Alonso, Kok, and O'Brien (2020) proposed a theoretical framework that considered both entrepreneurial action and the dynamic capabilities when they explored sustainable wine tourism dimensions among four countries.

Moreover, the aforementioned limited adoption of theoretical frameworks is more pronounced concerning a more comprehensive consideration of sustainability, which, for instance, recognises the four pillars put forward by Yencken and Wilkinson (2000). Indeed, under the umbrella of sustainability, Yencken and Wilkinson (2000) concur with the inclusion of the following pillars that underline multiple objectives:

*Ecological-Environmental*, which typically prioritises decreasing pollution, utilising resources efficiently, and variety in animal or plant species (Lin & Yang, 2006).

*Social*, recognised as the ongoing capacity of a society to be responsible for its citizens' well-being, doing so in an equitable and fair manner, including through the opportunity to work, as well as through adequate income or housing (Yencken & Wilkinson, 2000). Hence, social sustainability is commonly concerned with social equity, liveability, or security (Lin & Yang, 2006).

*Economic*, perceived as predominantly favouring the improvement of personal finances or productivity (Lin & Yang, 2006).

*Cultural*, which stresses upon "the economic value that can be achieved with the help of culture" (Soini & Birkeland, 2014, p. 220), and therefore can have significant impacts on economic or social development. Among other conceptualisations, culture is referred to in the context of values in a society and how these values are expressed (Hawkes, 2001).

To date only one of the pioneering studies on sustainable wine tourism conducted over a decade ago (Poitras & Getz, 2006) has considered three of the four pillars. Furthermore, there has been scant focus on sustainability in the field of wine tourism in emerging economies. This line of research could be useful for developing wine regions, not only in emerging economies but also in more established ones, as new emerging information could be of practical value, including by providing direction to businesses on how to develop and implement sustainable wine tourism practices.

Against this backdrop, the present research seeks to achieve various objectives. First, the study will investigate sustainability from the perspective of winery owners-managers operating in three different wine regions. More specifically, the study seeks to ascertain the types of sustainable practices the participants' wineries adopt, for instance, associated with the four pillars of sustainability.

Second, the study gathers data among wineries operating in two emerging economies, Argentina and Chile. Studying sustainable wine tourism in emerging economies could contribute to added knowledge that would benefit developing wine regions, as well as enable comparisons with wineries in other more economically developed economies (e.g., Old World of wine nations) through future research.

Third, the study seeks to build upon theoretical discourses in the field of wine tourism. To this end, the study considers stakeholder theory (e.g., Donaldson and Preston, 1995; Freeman, Wicks, & Parmar, 2004) to illuminate the understanding about the rationale for wineries' sustainable practices. Stakeholder theory has supported many studies focusing on sustainable tourism (e.g., Byrd, 2007; d'Angella & Go, 2009; Theodoulidis et al., 2017). However, its insightfulness has not been fully utilised in studies addressing sustainable wine tourism. In adhering to principles of inductive analysis (Thomas, 2006), and the methodology put forward by Gioia, Corley, and Hamilton (2012), the study will propose a theoretical

framework developed from the gathered data. This framework will provide a more comprehensive conceptualisation of sustainable wine tourism.

## **Literature Review**

### *Stakeholder theory and sustainable wine tourism*

Donaldson and Preston (1995) define stakeholders as groups or individuals who have “legitimate interests in procedural and/or substantive aspects of corporate activity” (p. 67). Freeman (1984) more widely defines stakeholders as those who can affect or be affected by achievements of an organisation’s goals. These conceptualisations are important in the present research as they are embedded in the ways owners-managers design and manage their winery business. While there are various stakeholder groups involved in or associated with wine tourism activities and its sustainability (visitors, suppliers, other businesses), this study draws on the experiences and perceptions of winery owners-managers. The role of this last group representing the supply side (Duarte Alonso et al., 2020) is undoubtedly the most relevant in creating, managing, and delivering wine tourism experiences. Examining sustainability from this stakeholder group suggests the value of stakeholder theory as a useful theoretical lens in the present research. Stakeholder theory has found acceptance across different functional disciplines (Laplume, Sonpar, & Litz, 2008), including in the domains of hospitality and tourism (Khatter et al., 2019; Timur & Getz, 2008). Furthermore, exploring sustainability in the wine industry is also warranted, particularly due to the role that wine tourism plays in rural and local development (Montella, 2017).

This section focuses predominantly on the theoretical contribution by Donaldson and Preston (1995), and it is complemented by tourism literature. Furthermore, in bringing together stakeholder theory and wine tourism literatures, Figure 1 proposes an initial conceptualisation of the theory in the context of sustainable wine tourism.

Stakeholder theory predicates that values are explicitly and necessarily a key component of conducting business (Freeman et al., 2004), and that the substance of a business mainly lies in establishing relationship and creating value for all the company’s stakeholders (Freeman & Dmytriyev, 2017). Freeman et al. (2004) also emphasise the need for management to verbalise a “shared sense of value... what brings its core stakeholders together... [and] pushes managers to be clear about how they want to do business...” (p. 364). This broad assumption can also be perceived in the context of tourism and wine tourism offerings, and within these, sustainable tourism activities, undertaken in such ways that environmental footprints, or other potentially negative effects are minimised, while positive ones (e.g., socioeconomic benefits) can be heightened. Moreover, as postulated by Freeman et al. (2004), while management strive for their firm’s success, they should also be clear on the relationships they need or want to create with their stakeholders. These stakeholders, which include employees, customers, and suppliers (Donaldson & Preston, 1995), are arguably also part of the wine tourism environments.

Donaldson and Preston (1995) identify the four central theses of stakeholder theory, all of which arguably spill over into the different forms of sustainability (Figure 1):

*Descriptive*, in that it describes what a corporation is, namely, a collection of competitive as well as cooperative interests with inherent value. In a wine tourism setting, and regardless of their size, winery businesses’ activities, which comprise consumption experiences in various ways, lean towards these interests. Indeed, a framework for sustainable wine tourism at the community level (Poitras & Getz, 2006) highlights the significance of vision and related goals, whereby there are expectations for the wine industry to fulfil, notably, in environmental, economic, and social domains. The fourth pillar, culture (Yencken & Wilkinson, 2000), while not present in the framework, can also be considered as playing a

fundamental part and can be supported by wineries' engagement, including by strengthening the region's wine destination image and local wine traditions.

*Instrumental*, which establishes a model to examine any potential links between practicing stakeholder management and achieving corporate performance objectives, in other words, whether engaging in stakeholder management results in successful corporate performance (e.g., growth, stability). From a cultural sustainability perspective, there are benefits to be accrued by wineries. Recently, a four-country wine tourism study (Duarte Alonso et al., 2020) identified the importance of 'selling gastronomy', including local cuisine, as a key ally in complementing wine tourism activities. As Sims (2009) suggests, local food can contribute to the development of sustainable tourism, including by enhancing visitors' experience, as well as "by connecting consumers to the region and its perceived culture and heritage" (p. 321). Similarly, Tafel and Szolnoki (2019) identify the importance of wine tourism in helping preserve a region's tangible and intangible heritage, which can also comprise a region's food culture.

*Normative*, which comprises adhering to two fundamental ideas. First, and associated with the definition of stakeholders (Donaldson & Preston, 1995), the normative thesis considers stakeholders as groups/persons with legitimate interests, notably, in the corporation, regardless of the corporation's reciprocity in 'functional interest', or lack thereof. Second, all stakeholders' interests are of inherent value; hence, their interests deserve consideration for their own sake, as opposed to furthering the interests of other groups, such as shareowners among larger corporations (Donaldson & Preston, 1995).

In a sustainable wine tourism setting, and further considering the model presented by Poitras and Getz (2006), various insights advance the understanding of the normative thesis. First, the environmental goals of wine tourism underline the significance of sustaining the small town/rural atmosphere, where typically wine tourism activities take place (Poitras & Getz, 2006). Second, the economic goals strive for attracting high-yield tourist, while avoiding mass tourism (Poitras & Getz, 2006). Finally, the social goals of wine tourism advocate benefits for residents, including by creating new business and employment opportunities (Poitras & Getz, 2006). Similarly, other studies stress the socioeconomic value of wine tourism (Figueroa & Rotarou, 2013; Tafel & Szolnoki, 2019).

Figure 1 Here

In addition, Donaldson and Preston (1995) discuss a fourth thesis, the *managerial*, which reinforces some of the notions previously presented. Essentially, the managerial thesis can not only "predict cause-effect relationships" (Donaldson & Preston, 1995, p. 67), but also and importantly, recommend practices, structures or attitudes that combined represent stakeholder management. In turn, stakeholder management requires simultaneously paying "attention to the legitimate interests of all appropriate stakeholders" (Donaldson & Preston, 1995, p. 67).

Figure 1 depicts this 'broad sense' of managerial stakeholder theory (Donaldson & Preston, 1995). Complementing existing discourses of sustainable wine tourism (Poitras & Getz, 2006), the framework emphasises more strongly the cultural dimension, the fourth pillar of sustainability. In doing so, the framework seeks to fill an existing void in wine tourism research, in that consideration of this pillar, whose significance is part of the discussion of sustainable wine tourism (e.g., Tafel & Szolnoki, 2019), has to date been modest.

Moreover, culture has a rich conceptual and practical foundation that can advance the understanding of sustainability in wine tourism settings. According to Hawkes (2001), culture:

- Identifies values and aspirations of communities,
- Provides a name to processes used to evaluate the past, act in the present, and discuss the future,
- Brings together issues and concepts that to date have been developed in parallel, including engagement, belonging, distinctiveness, wellbeing, or capacity,
- Provides intellectual tools that allow for building a more effective structure.

Associated with these notions, Hawkes (2001) recognises that the bulk of the scholarly literature relies upon two inter-related definitions of culture. One definition emphasises the social transmission and production of knowledge, attitudes, beliefs, aspirations, identities, or values, while the other refers to ways of life, including cuisine, traditions, language, customs, or faiths (Hawkes, 2001). Overall, by incorporating the different pillars of sustainability and the theses associated with stakeholder theory, the framework (Figure 1) hypothesises various outcomes and impacts for the wine region. The framework also suggests that the process of pursuing a sustainable wine tourism industry is continuous, requiring constant attention and reflection upon the objective of each pillar. In line with the above proposed conceptualisation, the study will address the following overarching research question:

To what extent is sustainability embraced by wineries involved in wine tourism experiences?

## **Methodology**

The present study uses a qualitative data collection method to examine sustainable wine tourism from the perspectives of owners-managers of wineries offering wine tourism experiences. Qualitative research, where open-ended techniques are applied, including interviews, can provide diverse, detailed insights, and quotes that, together, can inform and enhance applied research (Forman et al., 2008). Associated with this method, the study draws on a general inductive approach, which, according to Thomas (2006), is based upon the following key purposes:

- Condense raw data into summary format,
- Establish connections between research objectives and findings revealed in the raw data, and
- Develop a framework, which illustrates the primary structure of processes or experiences that emerge from the raw data. Thus, inductive analysis is suitable for studies whose purpose is the development of theory (Zhang & Wildemuth, 2009).

The qualitative research also adopts an empirical phenomenological approach, which is suitable for research endeavours “ranging in scope from small to large-scale” (Aspers, 2009, p. 1). More specifically, empirical phenomenology assumes that scientific explanations must be based upon “the meaning structure of those studied” (Aspers, 2009, p. 1); thus, at the core of the analysis is the perspective of actors. In addition, under empirical phenomenology, “the social world is socially constructed” (Aspers, 2009, p. 1), and theory plays a key role. Therefore, empirical phenomenology is not simply a story-telling exercise from actors’ points of views (Aspers, 2009).

In line with the adopted qualitative method, inductive paradigm, and empirical phenomenological approach, a multicase study approach is considered in this study. This type of case research begins with recognising an idea or concept that brings cases together (Stake,

2006). One fundamental reason for selecting a multicase approach is to investigate a phenomenon in different environments; consequently, in some ways, the chosen cases should bear resemblance (Stake, 2006). Furthermore, the study of multiple cases revolves around one or more research questions (Stake, 2006). Essentially, multicase study is appropriate for qualitative fieldwork, and draws on purposive sampling, which is tailored to one's research, contributes to enhancing its variety, and allows for intensive study opportunities. Thus, the study additionally considers purposive sampling, which consists of strategically selecting 'information-rich cases' (Patton, 2015). Reflecting this ideology, the use of purposive sampling facilitates the strategic selection of 'information-rich cases' (Patton, 2015) that address the needs of this study. These cases are represented by the chosen winery owners-managers; to qualify as information-rich cases, and therefore be considered in the present research, the following criteria for prospective participants was established. Fundamentally, that:

- Participants are owners/managers of the winery,
- Have experience of at least two years in the wine industry, and with it, in the delivery of wine tourism activities,
- The winery is open to the public, and offers at least two wine tourism activities (e.g., winery/vineyard tours, tastings, food-wine pairings, a restaurant onsite).

In preparation for the data collection stages, the contacts of as many as 74 existing wineries in the Argentine regions of Mendoza (40), San Juan (17) and in the Chilean region of Casablanca (17) were found through Internet searches. The first and last region are part of the group of Great Wine Capitals (<https://www.greatwinecapitals.com/>), while the third region, San Juan, is only second to Mendoza in wine production in Argentina. Based on these characteristics, contacting wineries from the leading wine regions in emerging economies was considered appropriate for the research. In September of 2018, upon receiving ethics approval to conduct the investigation, all the identified 74 wineries were approached through electronic correspondence; the message contained an introduction to the goals of the study, and invited owners-managers to take part through an on-site, face-to-face interview to be carried out later in 2018 and in the beginning of 2019. In the following weeks, 32 participants or 43.2 percent of all contacted, affirmatively responded to the invitation to partake in the study.

Subsequently, two members of the research team travelled to Argentina and Chile and conducted interviews at wineries' premises. To develop the questions for this research, a range of academic contributions discussing sustainable wine tourism practices were consulted (e.g., Baird, Hall, & Castka, 2018; Figueroa & Rotarou, 2013; Montella, 2017; Poitras & Getz, 2006; Taylor, Barber, & Deale, 2010; Visentin & Vallerani, 2018). Accordingly, and apart from providing a battery of questions concerning demographic aspects of wineries and participants (Table 1), the following overarching questions were posed during the interviews:

To what extent is your winery involved in practices that contribute to a sustainable wine tourism activity?

Specifically, in what way(s) is your winery engaged in sustainable practices?

These open-ended questions were perceived to elicit extended comments that would help isolate forms in which wineries are engaged in wine tourism activities and practices, with the potential to align them with the four pillars of sustainability. The length of the interviews was 75 minutes on average; participants were presented with a written consent to take part in the research. This duration allowed the research team members to conduct on-site observations,

tours of the premises, vineyards, and other operations and production facilities, as well as collect notes alongside specific winery information (e.g., brochures). One member of the research team who is bilingual conducted the majority of the interviews (27) in Spanish; the other five interviews were conducted in English. This researcher also undertook the transcribing of the interviews, all of which were audio recorded with participants' permission. However, to "ensure that the translated instrument is appropriate" (Douglas & Craig, 2007, p. 41), the research team utilised back translation, whereby an iterative team approach with multiple iterations between research team members was carried out.

Numerous views exist concerning what constitutes data saturation or the stage where no new themes or information emerge from the (interview) data (Guest, Bunce, & Johnson, 2006). This study considers the position of O'Reilly and Parker (2012), who advocate for sampling adequacy, or "the appropriateness of the data" (p. 195), rather than attaining a specific numerical target of participants.

Upon transcribing the interviews, with the involvement of all members of the research team, and aligned with the selected inductive approach, qualitative content analysis was undertaken. This method consists of interpreting data content through systematic classification of identifying and coding patterns or themes that emerge from the data (Hsieh & Shannon, 2005), thus going beyond the extraction of objective content to investigate themes and meanings that are found in text (Zhang & Wildemuth, 2009). Aligned with Zhang and Wildemuth (2009), the data management software NVivo, version 12, supported the analysis process. Finally, all participants were coded using abbreviations (Table 1); these abbreviations will be used in the following sections, including when presenting specific verbatim comments.

#### *Demographic data of participants and wineries*

At the time of the study, all participating wineries were open to tourism. 20 participants (62.5%) were managers, eight (25%) owners, and four (12.5%) winemakers with managerial responsibilities. On average, these individuals had 15 years of experience, where two years was the minimum and 40 years the maximum. Just over half (17, 53.1%) of participants were male and 15 (46.9%) were female. The largest group of wineries (13, 40.6%) employed less than 10 individuals, and seven (21.9%) over 35. Finally, the average age of all wineries was 27 years.

Table 1 Here

## **Results and Discussion**

### *Extent and illustrations of involvement of wineries in sustainable wine tourism practices*

Figure 2 (upper half) provides a demonstration of the study's data analysis, which consider 'the Gioia methodology' (Gioia et al., 2012). On the left hand-side, 'informant-centric', or first-order terms were developed; this step significantly relied upon "giving extraordinary voice to [the] informant, who are treated as knowledgeable agents" (Gioia et al., 2012, p. 26). These terms were then organised into second-order (theory-centric) themes, which emerged from participants' individual comments (Figure 2, lower half), and subsequently were distilled into overarching theoretical dimensions (Gioia et al., 2012).

At times, participants' observations illustrated overlaps between the different pillars. For instance, the economic element also intersected with the social through the provision of employment, a contribution that all participating wineries made at different levels (Table 1). Related to this finding, Soini and Birkeland (2014) identify interconnections between cultural and social phenomena.

Furthermore, the dimensions depicted in Figure 2 incorporate wine terminology associated with the number of pillars in which the wineries were engaged. More specifically, the ‘full glass’ dimension refers to those comments identifying involvement with all four pillars of sustainability; this was the case among one-fourth of the participating wineries. While economic sustainability clearly stood out, the other three pillars were also significantly represented in the comments, with the social pillar emerging as a relevant second, followed by both the cultural and environmental pillars.

Participants’ perceptions, complemented by on-site observations, tours, and printed material helped identify several model businesses representing the three regions and aligning to the above dimension; these will be discussed in the following paragraphs. First, ME1, a chef-manager whose international journey brought him to Mendoza, where he became engaged in a long-term project that encompassed sustainable practices in unique ways. In fact, while the winery (ca. 35 employees) provided employment to dozens of local residents, and engaged in environmental practices (recycling, composting), it also sought to preserve an important regional cultural element: “I was commissioned to try to revive different species or varieties of vegetables. These varieties are dying out, so we try to rescue them and bring them back to life.” This finding aligns with the realms of the descriptive thesis of stakeholder theory, where while competing for its own commercial interests, the business also aims at supporting initiatives with intrinsic value (Donaldson & Preston, 1995), in this case, through environmental-ecological efforts. In this instance, the business contributes to minimising food-miles and associated issues arising from sourcing foods elsewhere (package). Conversely, the business supports conservation efforts and the cultural heritage of foods, some of which have grown in the region for generations, thus, contributing to perceived quality of the culinary experience.

Figure 2 Here

Moreover, at the time of the study, ME1 acknowledged sourcing from the winery’s premises (orchards) more than 90% of the foods the winery-restaurant utilised to offer culinary experiences. Amid the dozens of different varieties of vegetables (e.g., tomatoes, potatoes, pumpkins, corn, mustard), as well as a repertoire of fruits (e.g., melons, watermelons, raspberries), the participant was also engaged and committed to securing future crops, drying, selecting and preserving seeds. Undoubtedly, this intense involvement in the front line of food production was a source of garnering accolades: “I am the chef who produces most of food sourced by any restaurant... Other chefs know me for that achievement.” At the same time, however, it demanded sacrifices that only a few were prepared to make:

“Looking after the orchards takes me as much or more time than cooking. While other chefs sympathise with this form of sustainable food growing, they cannot follow this philosophy: it is too much work. However, I only work with this philosophy...The fact that 50% of the visitors to the restaurant ask for a tour of the orchard illustrates that they are buying into this philosophy.”

ME1’s experience illustrates the potential of various forms of sustainability (environmental, social, cultural) to contribute to a business’s appeal, long-term competitiveness, and therefore economic sustainability. Moreover, while the restaurant’s menu was priced at US\$60 per person, ME1 acknowledged: “Our growth has been phenomenal.” This realisation echoes notions of the instrumental thesis (Donaldson & Preston, 1995), namely, through the links between stakeholder management and the



business's performance, and overall, has links with the managerial thesis. Thus, in contrast to previous research, where the normative thesis was not confirmed (Theodoulidis et al., 2017), in the case of ME1 and other participating firms, all four theses and correspondingly the 'full glass' dimension emerged.

Similarly, ME12, whose winery employed 370 individuals, already fulfilled various sustainable environmental aims, with the first being environmentally: "Originally, we started producing one bottle of wine with 16 litres of water. Now, we use approximately 3 litres of water per litre of wine." Referring to socio-economic pillars, ME12 pointed to the winery's management's more 'global' or inclusiveness in recruiting staff: "The large majority of our employees are locals, and we are also opened to international applicants. Our team is very multicultural; we have here people from Brazil and Colombia." More specifically referring to social sustainability, ME12 noted various key factors, with implications for the winery's economic wealth and sustainability, for instance, in the form of product and service delivery:

"In this new vineyard, we have 150 workers living with their families in some 50 houses provided by the company; of course, the winery pays the employees' salaries, but also the house and the service (kindergarten, primary school, doctor, recreation centre). These individuals are quite knowledgeable, and the company wants them to stay because their knowledge and expertise will surely have a direct impact on the quality of the grapes and wines... Near the cafeteria, we devote a space for teaching basic skills to our employees. Some of them are completing a high school diploma. The idea is that people also grow, not only the company."

Therefore, by investing on a key stakeholder group, the employees, and extending this investment to the well-being of their families, the company's management perceived a potential end-benefit, this time, through consistency of production and quality processes. This situation illustrates that considering the involvement of other stakeholders is perceived as essential, and aligns with sustainable tourism development discourses (e.g., Bressan and Pedrini, 2020; Byrd, 2007). In addition, it demonstrates the usefulness of reflecting upon the company's actions through the lens of the instrumental thesis (Donaldson & Preston, 1995), with apparent links between practicing stakeholder management and its positive ramifications.

The descriptive, normative, and managerial theses were equally apparent in the case of third model firm (C2). This participant's reflections first highlighted the importance of economic sustainability, through costs, production performance, and revenues, which stem from the flow of visitors to the winery. Secondly, there was strong emphasis on environmental-ecological practices. Indeed, in recent years, the winery had moved into organic wine production. Another fundamental step toward mitigating the effects of the winery's environmental footprint:

"In 2004, we stopped burning wood to heat up the air in the vineyards in the winter and began using fans, which are zero carbon certified, are operated by propane gas, and help against frost. The fans are operated by propane gas."

Similarly, another gradual key development included a revision of aspects of wine presentation and distribution, changing the wine bottles to those manufactured with thinner glass. This initiative resulted in decreases of "transportation and shipping costs, not to mention a decrease in CO2 emissions..." and further complemented much-needed lessening of water usage in an already water-stressed region: "water is a concern in the valley... we have managed to recycle between 50% and 60% of the water used in the cellar."

The normative thesis emerged through social and cultural activities that, together, demonstrated the winery ownership's concern with several of its stakeholders (C2):

“We have a vegetable garden... Employees here can take advantage of their work, by growing their own food, which they can take home and share it with their family, or sell, and learn about organic food growing... We also organise meetings with students from Valparaiso and Santiago. Students come and learn about organic approaches...”

These comments once again accentuate the importance of involving the closer and wider community in the wineries' initiatives, or different stakeholders, discussed in earlier research (Bressan and Pedrini, 2020; Byrd, 2007). On one hand, promoting a collegial working environment through a leisure activity of growing one's food could enhance communication and develop higher quality worker relationships, ultimately stimulating a more positive work environment. In turn, this situation could also be reflected in employee-visitor interactions as well as in enhancing the image of the winery. On the other hand, connecting with the wider community, in this case students from other major cities, could help build a foundation where future generations of wine enthusiasts are nurtured through environmentally sound approaches.

These notions are further reinforced in the fourth case (SJ1). The comments first underscored the relevance of economic sustainability, with the winery opening new international consumer markets, and increasing its involvement in wine tourism activities. Located distantly from the city of San Juan, the winery employed local residents, sought to maintain a harmonious balance in its traditional construction and growing industrial demands, and also provided opportunities for international students to accumulate work experience. Building on its knowledge capacity through collaboration, the winery's management employed a heads-on approach to respond to environmental issues (SJ1):

“Three years ago, we started a project with a local university to determine our environmental footprint... there isn't much bibliography of environmental footprint in viticulture; therefore... for us and the university this is a win-win situation... We have also started a project to treat our effluents without chemical materials.”

As the interview underscored, SJ1 and the winery ownership were in agreement of the ramifications that the currently implemented sustainability initiatives would have on the winery, including through conveying the winery's 'sustainable message' to end consumers and visitors.

In addition, responses identifying the 'three-quarter full glass' dimension, or involvement in three of the four pillars of sustainability, represented the largest group. Furthermore, the 'half full glass' dimension revealed involvement in two of the four pillars, while only one comment was linked to the 'quarter full glass', or involvement in only one pillar of sustainability. Overall, and overwhelmingly, the comments pointed to economically sustainable ways in which wineries sought to become economically sound.

Regardless of the number of dimensions wineries identified themselves with, numerous verbatim comments also emphasised the value of cultural sustainability, from preserving ancient wine making traditions, to the safeguarding of the family generations, or even gathering mementos, tools, and symbols associated with the history of the wine in the regions. Such was the case of ME5, who for over five years had been collecting winery utensils and materials and added a museum of wine on the premises, which served as a

preamble to the wine consumption experience. ME5's experience aligns with wine tourism research highlighting the significance for wine routes to create attractive and 'complete' experiences that entail cultural, historical, and architectural value (Figuerola & Rotarou, 2018).

By possessing such valuable resources, a strong connection could be achieved between the winery's and region's wine history and tradition and visitors. In turn, emphasis on the cultural element through educational and leisure activities at the winery also represents a form of stakeholder management (instrumental thesis), and can result in similar benefits as to those perceived by SJ3. As with ME5, for this participant, maintaining the winery building's historic style was a source of attraction. Similarly, for others (ME6, ME12) cultural sustainability was perceived in terms of preserving the family heritage, and surviving as a family business. As ME12 stated: "we are very proud to be one of a handful of wineries with a rich tradition and still surviving. That is one of the highlights of our tours." For others (C5, ME4, SJ8, SJ9), and along the lines of ME1's experience, cultural sustainability was considered through the display and offer of locally produced foods (e.g., grilled meats, charcuterie, olive paste).

These findings therefore adhere with notions of the potential differentiation point, and therefore economic value that could be attained through culture, including heritage (Frost et al., 2020; Soini & Birkeland, 2014). Furthermore, visitation and an emphasis on preserving and educating visitors about the winery's history and heritage were perceived as avenues to elicit post-visit patronage and consumption, especially as the winery mainly shipped its production to large cities with a strong hospitality industry (e.g., Buenos Aires). Moreover, the on-site visits, including when interviewing SJ3 or travel to ME5's winery on two separate occasions, coupled with reading website comments from previous visitors underlined the perceived attraction and appreciation for this type of cultural heritage. These findings were also echoed by additional cases, where there was a strong family and Italian heritage (ME6, ME9), further reinforcing the links with the instrumental thesis.

#### *Proposed theoretical framework*

By adopting the Gioia Methodology (Gioia et al., 2012), and by aligning with the principles of inductive analysis (Thomas, 2006), and with the empirical phenomenology approach (Aspers, 2009), a theoretical framework revealing elements and dimensions of sustainable wine tourism from the perspective of owners-managers of wineries operating in emerging economies is proposed (Figure 3). Furthermore, extending from the first framework (Figure 1), and incorporating elements pertaining to the findings, including verbatim comments associated with the four pillars of sustainability partly illustrated in Figure 2, the framework suggests several overlaps between the theses of stakeholder theory, the different pillars of sustainability, and wineries' involvement in sustainable practices; these are depicted through the theoretical dimensions. These overlaps highlight the mutual inclusiveness of different notions revealed in the findings, thereby suggesting their insightfulness to reflect upon and enhance the understanding of sustainable wine tourism practices and their implications. In this context, the findings emphasise the importance of adhering to sustainable principles, not only to address environmental and other concerns, but also to add value to the winery business, with it in turn generating value to other stakeholders. Moreover, as illustrated in the cases of various model firms, and through numerous verbatim comments from other participants, wineries were able to benefit, namely, financially and through generating interest, with direct and indirect ramifications for future patronage (ME1, ME5, SJ3), or through know-how and expertise (ME12).

These findings are supported by case study research (Borsellino et al., 2016), which concludes that the adoption of sustainable strategies, including organisational, competitive,

and operative, can lead to improved winery management practices and socioeconomic benefits, which would also result in growth of the business. A similar conclusion is drawn in more recent research conducted among restaurants (Cantele & Cassia, 2020). Overall, the framework provides a conceptual path to understanding this adherence and the potential outcomes that could ensue, for instance, in terms of enhancing the image of the wine region. These outcomes all have direct impacts for the future development of wine tourism, and its associated experiences.

Figure 3 Here

## **Conclusions**

This study fulfils three key objectives. First, sustainable wine tourism activities and initiatives were examined from the perspectives of winery owner-managers; these perspectives were gathered through extended face-to-face interviews conducted on wineries' premises. Second, the study focuses on wineries operating in leading wine regions in emerging economies. Third, the study considers stakeholder theory as a lens through which linkages and alignments can be made between businesses' sustainable practices and their ramifications for themselves and other stakeholders. Further, together with the adoption of key principles of the Gioia Methodology, the study proposes a theoretical framework to generate a more in-depth conceptual and practical understanding of sustainable wine tourism.

The findings demonstrate adherence to the four pillars of sustainability by the large majority of the participating businesses. Undoubtedly, there is a strong link between embracing social, cultural, and environmentally sustainable practices and economic sustainability, for instance, through revenue generation, cost reduction, or potential value-adding to the final wine tourism product. Therefore, there is an argument that embracing the pillars of sustainability is tied to wineries' long-term economic sustainability, with important implications for the delivery of wine tourism experiences. Indeed, these experiences could be enhanced by the provision of local products, local heritage, or even by the preservation of local foods and the winery's family heritage (e.g., C5, ME1, ME5, ME6, ME12).

## *Implications*

Overall, the study's findings identify theoretical and practical implications. Theoretically, the different frameworks presented, and culminated by Figure 3 provide a blueprint and a guide to understanding sustainable wine tourism activities undertaken by the participating wineries. One key theoretical implication is the consolidation of all pillars of sustainability in the context of sustainable wine tourism. Moreover, through the development of several key dimensions, the study provides a conceptual tool to assess levels of involvement in sustainable wine tourism practices and their ramifications on the various stakeholders. In interpreting stakeholder theory's premises in terms of sustainability, Pérez and Rodríguez del Bosque (2014) posit that the theory suggests that sustainability must be assessed "on the bases of those stakeholders who benefit the most" (p. 175), as they represent the target audiences.

The linkages between stakeholder theory and the different pillars and dimensions provide a strong and rigorous conceptual background and foundation to understand the target audiences, without overlooking the underlying value for the organisation itself. Indeed, Theodoulidis et al. (2017) stress the potential market value for a firm and for society stemming from activities associated with employees, community, products, or the environment. Moreover, the cases of the firms adhering to the 'full glass' dimension illustrate the opportunities that could be garnered from different forms of sustainable wine tourism practices. Clearly, there must be a strong motivation for winery management to increase their

investments on sustainable practices financially. The framework depicts those benefits by considering the premises of stakeholder theory, and similar theses that have been revealed in the wine, tourism, and hospitality literatures (e.g., Borsellino et al., 2016; Cantele & Cassia, 2020; Frost et al., 2020). Therefore, a further theoretical implication is represented by the framework's flexibility in identifying practical links emanating from its conceptual foundations.

Overall, the developed framework responds to calls from earlier wine tourism research. In fact, Carmichael and Senese (2012) identified the relevance of a long-term evaluation of wine, the wine industry, sustainability, and tourism, together with the ecological, economic, "and sociocultural capital that provides the basis for all concerned" (p. 175). However, apart from addressing these calls, the framework provides a useful complement to an earlier contribution (Poitras & Getz, 2006), in this case, emphasising the significance of the cultural pillar as an integral part of sustainable wine tourism. Therefore, the framework extends theoretical discourses of this increasingly relevant tourist activity, with strong linkages to hospitality and gastronomy.

Cascading down from the proposed theoretical framework (Figure 3), one fundamental practical implication is that 'it pays' to embrace sustainable principles in wine tourism settings. Environmentally, participants voiced their concern of inconsistent or diminishing snowfalls in some parts of the Andes, or less rainfall, with clear impacts on available water to irrigate the vineyards or increased costs. In addition, there was a growing emphasis on decreasing the winery's ecological-environmental footprint, or even in working towards self-sufficiency in food production for a winery restaurant (e.g., ME1). Socially, wineries appeared to be proactive in strengthening ties with its staff, or in most cases hiring staff from the region. Culturally, there was strong interest in emphasising the 'localness' or regionalism of products, including by growing and preserving these (ME1) and utilising local foods to cater for visitors (ME4), by collecting and displaying traditional instruments, or by emphasising the family heritage of the winery. Arguably, most elements encompassing these three pillars are inevitably connected to economic sustainability, namely, through cost savings by sourcing locally, 'selling' local foods-gastronomy or through the winery's and the region's heritage.

#### *Limitations and Future Research*

Various limitations must be acknowledged in the present study. First, the study focuses on sustainable wine tourism from the perspectives of owners-managers whose wineries are located in leading wine regions and in emerging economies. Future research could consider broadening this scope to elicit responses from additional stakeholders and winery operations in other, less developed wine and wine tourism regions and destinations, which would facilitate comparative analyses, with potentially useful results. Similarly, the study relied on the responses of 32 participants. While gathering data from business owners-managers is becoming complex, for instance, recently, due to COVID-19- related travel restrictions, the costs associated with travelling, or participants' unavailability/unwillingness to be interviewed, future studies could nevertheless seek to gather responses, or consider more broadness of wine regions or countries. Finally, the study proposed three different theoretical frameworks substantiated by theoretical underpinnings (Figures 1-3), and empirical findings (Figures 2-3). Future studies could test the usefulness of these frameworks not only within wine tourism settings, but also more broadly, for instance, in hospitality or food-beverage environments.

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