

SPECIALIZATION AND WINE-RELATED LEISURE:  
AN EXPLORATORY ANALYSIS OF WINE TOURISM AS A LEISURE PUSUIT

By

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In loving memory of Amanda Dawn Miller (10/9/1986 – 3/20/2008) for her unconditional support and optimism

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Abstract of Thesis Presented to the Graduate School  
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SPECIALIZATION AND WINE-RELATED LEISURE ACTIVITIES:  
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The purpose of the study was to investigate the relationship between specialization in wine-related leisure and participation in wine tourism using the concept of recreation specialization as the theoretical framework. Key areas of focus included whether and how types of specialization occur among wine consumers, whether and how individuals tend to progress in terms of specialization levels and the influence of levels or types of specialization on the wine consumer's propensity for wine-related leisure-travel. Fifteen semi-structured interviews with individuals with a diverse range of wine consumption and activity participation were utilized in the determination of specialization levels.

High, moderate and low levels of specialization were exhibited by the participants. Two themes emerged from the data: wine as leisure and wine as tourism. Subthemes of wine as leisure included leisure meanings, constraints to wine as leisure, wine-related activity preferences, the role of learning and socialization into wine. The subthemes of wine as tourism included destination preferences, likelihood to engage in wine tourism and wine tourism as an epiphenomenon to other types of travel. Each theme and subtheme was contextualized by the demographic characteristics and level of specialization reflected by each participant.

The study has contributed to the body of demand-oriented wine consumer and tourist knowledge base, which is to date less extensive than supply-oriented research. Propositions by researchers from various specialties have been examined, including recreation specialization as a theoretical framework for understanding wine-involved individuals, constraint negotiation as applied to the specialized wine-activity participant and the link between everyday wine-related leisure and wine tourism participation. The study has demonstrated that theoretically-based interpretations of the attitudes and behaviors of wine consumers and tourists are not only possible but helpful in furthering the understanding of this growing niche market. Future research suggestions include cross-cultural examinations of specialization among the general population and targeted populations, as well as gender-, lifestage- and activity-specific studies.

## CHAPTER 1 INTRODUCTION

The consumption of wine is increasing worldwide. According to Datamonitor's October 2005 report, the global wine market grew by nearly 2% in 2004 to reach a value of \$147.5 billion and the market is forecast to have a value of \$162.9 billion in 2009, an increase of over 10% since 2004. While the area "under vine" in Europe (i.e., Italy, France, Moldova and Portugal) has declined since 1980, wine production in the United States, Argentina, Chile and Australia has increased significantly during recent years (Cambourne, et al., 2000). In Australia alone, the wine market grew by nearly 2% in 2004 and is estimated to reach a value of \$3,249.2 million by 2009, which is an increase of nearly 10% (Datamonitor, 2005a, 2005b).

In addition to everyday purchasing and consumption of wine, an increasing number of individuals are participating in wine-related leisure. For example, the increasing popularity of books, movies and specialty classes aimed at enhancing an individual's level of wine knowledge and skills such as tasting, pairing and cellaring. Searching on popular online book retailers provides thousands of relevant results from *Wine for Dummies* (2006) to *The Oxford Companion to Wine* (2006) and movie references such as the fictional film *Sideways* (2005) and the knowledge-building endeavor *John Cleese's Wine for the Confused* (2005) abound. The leisurely nature of wine-related activities is exemplified by Disney's Annual Epcot International Food and Wine Festival, which features wine tastings, a wine shop, a book shop, a wine bar and a "meet the winemaker" counter.

The economic impact indicated by many states and regions also substantiates a recent increase in wine tourism. For example, wine-related tourism expenditures in Texas were \$221.7 million in 2005 and about 20% of the income generated by wine produced in Texas is attributed to tourism, primarily through tasting room sales (MKF, 2005). State legislation has aided the

growth in winery visitation by allowing wineries to offer tastings in previously “dry” counties, demonstrating the statewide significance of revenue generated from wine tourism sales. Another growing sector of the North American wine tourism industry is the state of Washington. Jeff Wicklund of Purple Smile Wines states, "wine in Washington has completely blown up now, since farmers first started growing grapes in the '60s. We're the fastest growing region in the world" (Schiller, 2007). Indeed, Washington has grown from 19 wineries in 1981 to over 500 in 2007 (Washington Wine Commission, 2007).

Internationally, the New Zealand Ministry of Tourism (2007) indicates that the annual growth rate of visitation to vineyards by international tourists between 2001 and 2006 is 16% and over 10% of all international holiday tourists visited a winery in 2006. This trend contrasts with the decrease in domestic wine tourism, with less than 1% of domestic tourists visiting vineyards. The definition of wine tourism implemented by the New Zealand Ministry of Tourism only includes vineyard visitations, which may result in an under-representation of the broader wine tourism industry of New Zealand.

Hall, Longo, Mitchell and Johnson (2000) discuss wine tourism in terms of visitation to vineyards, wineries, wine festivals and wine shows that is motivated by the desire to experience the attributes of a grape wine region, as well as to participate in wine tastings. Additional definitions of wine tourism have attempted to portray the multitude of activities included in the wine tourism experience. For example, the National Wine Tourism Strategy launched at the Second Australian Wine Tourism Conference in Rutherglen in 1999 defined wine tourism as “visitation to wineries and wine regions to experience the unique qualities of contemporary Australian lifestyle associated with the enjoyment of wine at its source including wine and food, landscape and cultural activities” (Dowling 1999, p. 65). Wine tourism is a diverse phenomenon, most notably including events and festivals, cultural heritage, hospitality, education, dining,

tasting and cellar door sales and winery tours (Charters & Ali-Knight, 2002). From increased sales at bookstores and local wine shops to booming international vineyard “hot spots,” interest in wine is certainly expanding, which in turn gives rise to the need for a better understanding of the individuals involved in leisurely wine activities.

### **Statement of the Problem**

Academic interest in both the wine consumer and wine tourist is growing. Various culturally and geographically specific demographic and psychographic profiles of wine tourists have been developed (Bruwer, Li, & Reid, 2002; Tassiopoulos, Nuntsu, & Haydam, 2004; Weiler, Truong, & Griffiths, 2004) and topics such as motivation (Alant & Bruwer, 2004; Hall, Shaw, & Doole, 1997; Yuan, Cai, Morrison, & Linton, 2004) and destination choice (Brown & Getz, 2005) have been researched in terms of wine involvement, as well. The next step is to explore the phenomenon of consumer progression from novice to connoisseur, as well as an investigation of the factors that help or hinder the wine consumer’s shift from customer to tourist. By exploring wine involvement as a leisure activity, theoretical constructs such as recreation specialization (Bryan, 1977) may offer unified insight into the behaviors and attitudes of the wine involved individual. This insight will both contribute to the academic body of knowledge surrounding wine tourism and offer practical knowledge to be applied to destination marketing and policymaking that is sensitive to the wine tourist’s values, needs and demands.

According to Carlsen (2004), “what is lacking in the applied research approach is an overarching theoretical framework under which pure, curiosity-driven research into the phenomenon of wine tourism can be investigated” (p.6). Efforts to explore the motivations, profiles and trends among wine tourists have been made in recent years and domestic travelers have even been studied in terms of wine-related knowledge (Beverland, 2001; Charters & Ali-Knight, 2002; Mitchell & Hall, 2001), skill attainment (Brown & Getz, 2005), situational preferences

(Bruwer, et al., 2002; Ritchie, 2007), social group preferences (Weiler, Truong, & Griffiths, 2004), past experience (Brown & Getz, 2005; Charters & Ali-Knight, 2002) and other specialization-related factors (Williams & Dossa, 2003), though the constructs used have not been part of an “over-arching” framework.

In their suggestions for future research, Brown and Getz (2005) acknowledge the potential application of recreation specialization to the study of wine consumption and wine tourism, noting that data suggest a highly involved group exists among the social world of wine involved individuals. Brown and Getz indicate a gap in the literature regarding the characteristics of this highly involved group and how specialization may be applied to them. They also briefly mention the research-suggested hypothesis that specialization leads to travel in wine regions at a greater distance from an individual’s usual place of residence along with more refined destination preferences.

Though initially developed as a framework to better understand the behaviors and orientations of outdoor recreationists, Bryan’s (1977; 1979) recreation specialization can be applied to activities beyond the scope of outdoor recreation. Indeed, Scott and Shafer (2001a) explored specialization progression as a concept applicable to various activities, noting, “we feel the [specialization] framework is robust enough that it can be applied to leisure activities in general” (p. 322). Bryan (1979) stated that activities vary in their level of complexity and “certain activities, by their very nature, lend themselves more easily than others to high or low specialization, or to wider or narrower ranges” (p. 88). Moreover, Bryan suggested that the more specialized participants tend to take vacations associated with their preferred activity.

Wine tourism in particular is a leisure activity that naturally lends itself to varying levels of specialization, from the casual taster to the dedicated connoisseur. However, little research in this area has been guided by theoretical approaches to aid in the understanding of wine tourism. In

his comprehensive review of wine research, Carlsen (2004) confirms this observation. Though a lack of research directly applying theoretical constructs to wine tourism exists, the general concepts and framework established by recreation specialization can be readily applied to this leisure activity. Regarding the attitudes, behaviors and preferences of the wine market in British Columbia, Williams and Dossa (2003) imply that wine tourism is a leisure activity. Direct research into the leisurely nature of wine-related activities and tourism in particular, is clearly needed.

### **Purpose of the Study**

The purpose of the study was to investigate the relationship between specialization in wine-related leisure and participation in wine tourism. Key areas focused on during this study included the relationship between wine as leisure and wine as tourism, whether and how types of specialization occur among wine consumers, whether and how individuals tend to progress in terms of specialization levels and the influence of levels or types of specialization on the wine consumer's propensity for wine-related leisure travel.

### **Theoretical Rationale**

#### **Recreation Specialization**

Recreation specialization is a theoretical construct developed approximately 30 years ago as a framework for understanding outdoor recreational attitudes and behaviors (Bryan, 1977, 1979). Bryan developed recreation specialization theory through his work with trout fishermen in Wyoming, Idaho and Montana in the late 1970s. Through the use of on-site interviews and participant observation, Bryan found support for four key propositions: 1) fishermen become more specialized over time, 2) the more specialized fishermen comprise a leisure subculture with unique values, 3) increased specialization implies a shift in greater focus on nature and

conservation and, 4) as specialization increases, dependency on particular resource types increases (Bryan, 1977).

According to Bryan (2000), recreationists progress along a continuum from levels of low-specialization and low-involvement to high-specialization and high-involvement throughout their recreational careers. The term “specialization” is used in a similar manner to everyday usage, implying the state of possessing specific behaviors and orientations regarding leisure activities, often at the expense of other activities. The development from general to specific interests and preferences is reinforced by the extent to which the activity defines the recreationist’s identity (centrality to lifestyle), as well as exposure to and involvement in leisure “social world” reference groups.

Each level of specialization for an activity involves different views and practices regarding equipment and setting preferences, as well as varying levels of skill and knowledge, interest in the activity and experience participating in the activity (Bryan, 1977). In 2000, Bryan added several additional foci, including types of experiences sought, attitudes toward management, preferred social contexts and activity-centered vacation patterns. Bryan suggests that as the recreationist becomes more familiar with and involved in a particular activity, his or her behaviors and orientations regarding each of the mentioned dimensions will narrow and become more specific, hence the term specialization.

Scott and Shafer (2001a) compartmentalize the dimensions of recreation specialization into three broad categories including affect, behavior and cognition (the ABC’s of specialization). This categorization results in a better visualization of both the uniqueness and interrelatedness of each dimension (Figure 2-1). The central theme regarding affect is the tendency to become more committed over time in such a way that the activity becomes a central life interest (Scott & Shafer, 2001a). Two key terms can be pulled from the previous phrase: commitment and

centrality to lifestyle. For Bryan (1977), an activity's centrality to an individual's lifestyle may manifest in such dimensions as career and spouse choice. For example, an avid angler might choose a career that would allow for a greater proximity to fishing streams. Additionally, a potential spouse with similar interests may be perceived as more appealing than an individual who differs in leisure activity preference.

Centrality to lifestyle and commitment are conceptually related, as the achievement of both behavioral and personal commitment in an activity contributes directly to the centrality of the activity within an individual's lifestyle (Scott & Shafer, 2001a). Personal commitment involves entangling an individual's self-concept with an activity, as well as the adoption of activity-related values (Yair, 1992). The adoption of such values might lead to behaviors that further activity-specific interests (e.g., the active involvement in environmental conservation among wilderness-related specialists). Behavioral commitment focuses on the penalties attributed to discontinuation of an activity. Financial investment in equipment and training as well as external social commitments increase an individual's likelihood to remain behaviorally invested in a specific activity (Scott & Shafer).

As indicated, affective and behavioral components of specialization overlap. The perceived investment in an activity and risks associated with its discontinuation relate to affect, while the actual time, effort and money invested in the acquisition of equipment and skills refer to a more behavioral dimension. Buchanan (1985) argues that extensive investment in one activity might lead to the exclusion of other activities due to a lack of "skills, knowledge and financial resources to effectively pursue alternate interests" (p. 402). This results in what Scott and Shafer term a "focusing of behavior."

The third dimension of specialization is cognition, described by Scott and Shafer as the acquiring of skills and knowledge. Not only is the acquisition of higher levels of skill and

knowledge of key interest, but also the *desire* to specialize. For instance, an individual may develop technical proficiency very easily without demonstrating a desire to specialize in any particular activity. This situation would not be representative of progression from lower to higher levels of specialization according to Bryan's (1977) conceptualization. Bryan instead proposes that shifting from a general to a more specialized orientation toward an activity can be attributed to acting on the desire to obtain an elite status among the participants in an activity. Scott and Shafer (2001a) support this concept with the following statement:

When specialization is conceived as a process, there is an underlying assumption that progression is directed toward an "authentic" level of involvement and that the end product of progression is an elite or privileged status within the leisure social world (p. 325).

Bryan (2000) also mentions the implications of "jump-starting" into advanced levels of participation. *Status incongruity* may occur when an individual attempts to gain a great deal of knowledge and involvement in an activity without being properly socialized into the subworld (Scott & Shafer, 2001b). Therefore, the ideal specialization process involves a gradual shift from the general to the specific, from low-involvement to high-involvement, as a result of the desire to obtain an elite status among fellow participants in activity.

### **Progression versus Flat-lining in Specialization**

Two primary areas define the concept of specialization, as elaborated by Scott and Shafer (2001a) in their analysis of Bryan's work. The behaviors and orientations regarding such issues as equipment and social setting comprise one aspect and the process of becoming increasingly skilled and committed to a leisure activity over time, also referred to as *progression*, is the second. The concept of progression is supported by authors such as Little (1976) who stated that specialization is a process that involves "selective channeling of dispositions and abilities" (pp. 84-85).

A more recent study by Kuentzel and Heberlein (1997) furthered the concept of progression by studying the relationship between social status and sailing. Data were collected from 354 boaters at the Apostle Islands National Lakeshore on the Lake Superior coast of Wisconsin in both 1975 and 1985. Kuentzel and Heberlein hypothesized that the level of specialization achieved in sailing was status-based rather than progression-based. Their findings, however, supported progression among boaters. Regardless of their socioeconomic constraints and method of entry into the boating scene, dedicated boaters progressively became more specialized over time.

In his response to Scott and Shafer's (2001a) review of recreation specialization, Kuentzel (2001) reiterates that specialization may not be a linear process. Though it is important to view specialization in terms of process and change rather than just segmentation among participants, it is also important to see that contemporary life appears to encourage variety over specialization (i.e., a general level of specialization in multiple activities is preferred over high levels of specialization in one activity). Kuentzel (2001) states:

For those who do specialize, attachment to a specific leisure activity may be less about self-actualization and more about anchoring one's identity in an increasingly complex and challenging world of obligation, opportunity and ambiguity (p.353).

McFarlane (2001) and Bryan (2001) agree that specialization is a highly complex construct that must be reexamined in terms of contemporary activity pursuits, especially in terms of future research. Kerins and Cronan (2005) elaborated on this issue with their discussion of flat-lining. The term flat-lining suggests an intentional avoidance of progression in an activity and even distaste for those who do seek to become specialized (Scott & Godbey, 1994). Flatliners prefer to enjoy an activity holistically without the seriousness associated with progression-oriented specialists. Kerins and Cronan's perspective bring the discussion full circle to Bryan's (1977)

initial prediction that activities vary in their likelihood to support a specialization continuum due to inherently differing levels of complexity.

In considering recreation specialization's application to wine tourism, Bryan's (1977) four propositions can be easily related to the wine tourist. The first proposition involves the process of becoming more specialized over time. In this study, we suggest that involvement in wine-related activities is similar to outdoor recreation activities in that participants' behaviors and orientations become more specialized as the length of involvement in the activity increases. Preferences for particular wines are formed, knowledge is acquired, specialized equipment is purchased and so on.

The second proposition concerns increased involvement in a leisure subculture as specialization increases. This subculture has unique values that separate it from the less specialized participants. As supported by Bruwer, et al.'s (2002) *ritual oriented conspicuous wine enthusiasts*, wine tasting skills, terminology awareness, preferences for regions and types of wines and amount of experience are examples of values that exist among highly specialized wine consumers and tourists.

Bryan's third proposition states that increased specialization implies a shift in greater focus on nature and conservation. This focus may be translated into an awareness and interest in viticulture among wine consumers. Interest in the winemaking process may increase wine consumers' desire to visit wineries in order to experience the process hands-on. In this sense, increased specialization correlates with increased desire and propensity to travel to wine-related destinations, particularly to wineries. As consumers become more aware of wine's history, destinations such as Bordeaux, France and other regional preferences crystallize (Brown & Getz, 2005).

The fourth proposition states that as specialization increases, dependency on particular resource types increases. Bruwer, et al.'s (2002) address this supposition in their description of desired quality or attributes, which relates to how aspects such as country or region of origin, grape variety, alcohol content, price, recommendations by others, awards or show medals won and bottle shape and label design fit with the attainment of values. Bruwer et al. define values as “abstract beliefs about desirable goals or final states that transcend specific situational factors, thus giving them a strong influence on consumers’ cognitive processes” (p.225). The wine consumer’s increasingly specialized values influence his or her purchasing decisions making the individual more dependent on resources involving particular qualities and types of wines.

Progression and flat-lining are areas of interest in this study, as the key focus is the relationship between specialization in wine as a leisure activity and the experience of levels or types of specialization among individuals involved in wine-related activities. Motivating factors for specialization among wine-involved individuals as well as the relationship between specialization and wine tourism participation were investigated.

### **Research Questions**

The guiding research questions addressed in this study were:

1. Do wine consumers exhibit the characteristics associated with recreation specialization?
2. What factors motivate increased specialization among wine consumers?
3. Is wine consumption regarded as leisure?
4. Is there a relationship between specialization in wine as a leisure activity and participation in wine tourism?

## CHAPTER 2 LITERATURE REVIEW

This section addresses the application of recreation specialization to date, the foundations of leisure constraint theory and the current body of research regarding wine-related activities. Recreation specialization topics covered include types of activities researched, variables of interest and wine as specialized leisure. Constraints to leisure and tourism as intra personal, interpersonal and structural barriers are discussed as well as constraint negotiation strategies. Wine tourism topics discussed include consumer and regional business trends, market segmentation, motivation and profiling the wine tourist. While a link between leisure and tourism behaviors can be assumed, a discussion of this link is provided in the context of specialization and wine involvement.

### **Recreation Specialization**

#### **Activity Types**

A wide variety of activities have been explored using the recreation specialization construct. The following outdoor recreational activities have been studied in terms of specialization: motor boating and sailing (Donnelly et al., 1986; Kuentzel & Heberlein, 1997), fishing (Bricker and Kerstetter, 2000; Bryan, 1977; Choi et al., 1994; Ditton et al., 1992, Holland & Ditton, 1992), whitewater activities and canoeing (Kuentzel and McDonald, 1992; Wellman et al., 1982), scuba diving (Thapa, Graefe, & Meyer, 2005), hiking and backpacking (Shafer & Hammit, 1995; Virden and Schreyer, 1988; Watson et al., 1994), camping (McFarlane, 2004; McIntyre & Pigram, 1992), rock climbing (Ewert & Hollenhorst, 1994; Rapelje, 2004), mountain biking (Hopkin, & Moore, 1995), hunting (Miller & Graefe, 2000), birdwatching (Hvenegaard, 2002; Lee & Scott, 2004; McFarlane, 1994, 1996; Scott and Thigpen, 2003) and ultimate frisbee (Kerins, 2005).

While these activities are outdoors related, recent research has begun to apply recreation specialization to activities beyond outdoor recreation. In the late 1980s through the early 1990s, researchers began applying specialization to sports, as well. For example, Hill and Hansen (1988) and Hill and Simmons (1988) explored the specialization process among high school athletes, Halnson (1990) studied contingencies on sport specialization, Colson (1990) described setting and equipment preferences among tennis players and Yair (1990, 1992) explored the commitment process among long distance runners.

The recognized pioneers of this trend, however, are Scott and Godbey (1994) who extended the application of specialization to the social phenomenon of contract bridge. Rather than just focusing on segmenting recreationists, Scott and Godbey studied the social dimensions and motivations among bridge players. More recently, Kerstetter, Confer and Graefe (2001) applied the construct to heritage tourism. Using a ten-item specialization index, Kerstetter et al. found evidence of a specialization continuum among heritage tourists in Pennsylvania. These tourists were described as being in the low, medium, or high ranges of specialization. This study is important as it indicates an interest in applying the concept of specialization to tourism.

### **Variables of Interest**

The recreation specialization construct has primarily been applied to intra-activity participants, or individuals engaging in the same leisure activity. This extensive body of research focuses on distinguishing different types of recreationists by examining the affective, behavioral and cognitive characteristics present among various types and levels of participants in a range of different activities. Major variables of interest include preferences for physical and social setting attributes (Cole & Scott, 1999; Ditton, Loomis, & Choi, 1992; Ewert & Hollenhorst, 1994; Kuentzel & Heberlein, 1992; Martin, 1997; Scott & Thigpen, 2003; Virden & Schreyer, 1988), preferences for activity types (Donnelly, Vaske, & Graefe, 1986; Miller & Graefe, 2000),

equipment preferences (Bryan 1977, 1979, 2000; Ewert & Hollenhorst, 1994; Kuentzel & McDonald, 1992) and socialization influences (Kuentzel & Heberlein 1997; Mcfarlane 1996).

In a key article addressing the understanding of setting preferences among recreationists, Virden and Schreyer (1988) studied the physical, social and managerial setting attribute orientations of backcountry hikers. Three primary variables were used to categorize participants in terms of specialization - experience (general and recent), equipment and economic commitment and centrality to lifestyle (importance of activity). Virden and Schreyer found that significant differences did exist among hikers with varying orientations toward the activity. Those who were assessed as being highly specialized (greater experience and commitment to the activity) indicated preferences for settings with little social interruption, fewer conveniences and an overall primitive environment. Novices preferred setting attributes that facilitated comfortable and convenient outdoor experiences. Managerial preferences varied among the participants, with less specialized hikers indicating more extreme preferences.

In order to alter the limited perception of birdwatchers as fanatical and serious, Scott and Thigpen (2003) explored the different types of birders attending a birding festival in Texas. Four categories of birders (casual, interested, active and skilled) were identified based on the following indicators: the focusing of behavior (experience), level of skill and commitment (importance and centrality to lifestyle) reported. Active and skilled birders indicated higher levels of behavioral involvement and more specific destination attribute preferences. For example, skilled birders demonstrated very high levels of importance attached to the variety of birds available at a destination while casual birders indicated more general preferences.

Shifting from preferences regarding setting attributes to the types of activities preferred, two primary studies regarding activity type preferences were conducted by Donnelly, Vaske and Graefe (1986) and Miller and Graefe (2000). Miller and Graefe administered questionnaires to

1,006 hunters during the 1992 to 1993 hunting season in Pennsylvania. They identified seven types of hunting activities and hunters in each activity type were analyzed in terms of specialization levels. Specialization was indicated by frequency of participation, skill level, lifestyle and equipment preferences. A great degree of difference in terms of degree and range of specialization between the activity types was indicated in the results of the study, demonstrating the variation in applicability of the specialization construct to a range of activities.

Donnelly et al. (1986) surveyed motor and sail boaters in Maryland indicating three subactivity types within each activity. The three categories were day boaters, overnight cruisers and racers. Once again, the degree and range of specialization were assessed within and between each activity. They found that day boaters demonstrated below average degrees of specialization with racers at the opposite end of the spectrum, creating a boating hierarchy. Contrary to their initial hypothesis, the range of specialization did not decrease along the length of the continuum from day boater to racer but rather increased indicating greater variance in attitudes, behaviors and preferences regarding boating practices.

While Bryan (1977, 1979) found that increased levels of specialization result in more specific equipment preferences among trout fishermen, Virden and Schreyer (1988) found that backcountry hikers tend to become less concerned with equipment preferences as specialization increases and more concerned with setting preferences and personal skill level. This implies that as an individual's skill level increases, he or she becomes less dependent on specialized equipment and more dependent on the development of activity-specific skills. Similarly, Kuentzel and McDonald (1992) found that whitewater rafters tend to invest heavily in the purchasing of a boat and other equipment upon entrance into the activity, then level off in terms of economic investment in equipment once these necessities have been acquired.

The second major theme among specialization research utilizes a progression-oriented approach. This research focuses on distinguishing the various levels of involvement among intra-activity participants as well as exploring the process of shifting from a general low-involvement orientation to a more specific high-involvement activity orientation. This process is examined in terms of such indicators as commitment, desire and motivation. Scott and Schafer (2001a) argue that no research to date has "test[ed] the extent to which recreationists progress to more advanced levels of involvement over time (p. 321)."

McFarlane (1994) contributed to the topic of specialization and progression by exploring the shift in motivations of birdwatchers over time. McFarlane describes three primary motivations: affiliation-oriented (social), achievement-oriented (skill) and appreciation-oriented (affect). McFarlane found that recreationists tend to shift from affiliation and achievement orientations to appreciation orientations of motivation over time. This shift toward appreciation occurs concurrently with development along the specialization continuum described by Bryan (1977; 1979). This means that the individual increasingly seeks a particular activity out of an intrinsic desire for enjoyment versus extrinsic motivations such as an individual's social setting or perceived status among the leisure social world.

While a majority of progression-oriented research explores the shift from low levels to higher levels of specialization, a new area of focus involves nontraditional career trajectories, such as flat-lining. Kerins (2005) studied the nonlinear career trajectories of ultimate frisbee players. A career trajectory is defined as "the path that an individual takes while sustaining involvement in a recreational activity" (Kerins, 2005, p. 3). This study supported other researchers' (Kuentzel & Heberlein, 2006; Kuentzel & McDonald, 1992; McFarlane, 1994) propositions that progression is not the most common trajectory among the majority of recreationists. Kuentzel and McDonald (1992) found evidence of nonlinear career trajectories among whitewater rafters along the Ocoee

River in Tennessee. Rafters tended to increase in experience, commitment and lifestyle during the initial stages of involvement in the activity. However, levels of commitment and lifestyle centrality level off after this stage while experience continues to increase. Also, a high level of investment in equipment occurs upon entering the activity, but levels off as the necessary equipment is acquired.

### **Wine as Specialized Leisure**

The specialization research regarding personal commitment is key to the discussion of wine involvement as a leisure activity. Centrality to lifestyle and the influence of leisure activities on identity, or self-concept, help to explain the importance that leisure activities can play in an individual's daily life. Stebbins (1992) made this point with regard to people who are serious leisure participants. He noted that participants "are inclined to speak proudly, excitedly and frequently about [their leisure pursuits] to other people and to present themselves in terms of these pursuits when conversing with new acquaintances" (p. 7).

It can be implied that individuals pursuing wine activities for leisure vary in degrees of personal commitment. For example, an individual who considers wine to be a central life interest might permanently relocate to a location such as northern California or Italy in order to pursue their hobby further, or perhaps seek a career involved in wine production or distribution. Also, the more an individual associates his or her leisure pursuits with self-concept, the more likely the individual is to remain committed to the activity (Yair, 1990, 1992). For example, individuals with wine as a central aspect of their self-concept might engage in weekly wine tastings in order to reaffirm this identity.

Ryan and Glendon (1998) indicate four motives determining satisfaction in leisure activities: intellectual stimulation (discovery and learning), social involvement (friendship and the esteem of others), competence-mastery (challenge and skill development) and the drive to escape from

over-stimulating life situations. They successfully applied these motives in an abbreviated version of the Beard and Ragheb's (1983) Leisure Motivation Scale to the study of British holidaymakers involved in leisure tourism. All four motives relate well to the specialization construct as follows: intellectual pursuits can be translated as cognitive aspects such as the desire to obtain high levels of activity knowledge; social involvement can be seen in terms of social setting preferences and the group nature of wine activities; competence-mastery directly relates to the desire to refine activity-specific skills; and the desire to escape relates to the type of experience sought by an activity participant.

Brey and Lehto (2007) examined the link between daily activities and vacation activities. They found that certain activities tend to be associated with greater levels of participant loyalty, which in turn results in the participation of these daily leisure activities while on vacation at a tourism destination. For example, 72.3% of daily golfers played while on vacation. Other activities that indicated this relationship between daily and vacation activities include hunting, fishing, going to art galleries and shows and theme park visitation. While studies have primarily focused on the behavioral aspects of the tourism-leisure link (Currie, 1997; Moore, Cushman, & Simmons, 1995), Brey and Lehto propose that future research should be expanded to address situational factors including personality, social contexts such as companionship and purpose of travel.

Carr (2002) contributed to the discussion of leisure and tourism by proposing that underlying influences determine how individuals act during leisure and tourism pursuits. These influences include residual social and cultural values obtained from an individual's home environment and the non-residual culture experienced as part of the tourism destination. Personal motivations and characteristics are seen as mediating factors in regard to the level of influence exerted by the

residual and tourist cultures. Carr concludes that “pleasure-oriented tourism and leisure behavior are closely related and should not be regarded as separate fields of study” (p.981).

### **Constraints Literature**

Constraints have been studied from activity-specific approaches focusing on such leisure pursuits as hiking (Bialeschki & Henderson, 1986), playing bridge (Scott, 1991) and golfing (Backman & Crompton, 1990). Other approaches have concentrated on gender-related differences (Jackson & Henderson, 1995) and age-specific approaches (Caldwell, Darling, Payne & Dowdy, 1999). Motivational factors have been studied recently (Alexandris, Tsorbatzoudis & Grouis, 2002), as well as constraint negotiation. Initially, an individual was believed to passively succumb to both internal and external barriers to participation (Crawford & Godbey, 1987; Henderson, Stalnaker & Taylor, 1988; Jackson, 1989; Shaw, Bonen & McCabe, 1991). Following this conceptualization was the proposal by Crawford, Jackson and Godbey (1991) that individuals actively negotiate intrapersonal, interpersonal and structural constraints as a hierarchy through both behavioral and cognitive strategies. While this theory has been further researched and modified (Jackson & Rucks, 1995, Jackson, Crawford & Godbey, 1993), it remains central to the current understanding of constraints.

Crawford, Jackson and Godbey describe intrapersonal constraints as those pertaining to internal, or psychological, processes. They include personal preferences, interest, self-rated skill and knowledge and social attitudes. In terms of the hierarchy of constraints, intrapersonal constraints are the first set to be negotiated. They are also the most difficult to overcome and the most likely to impede on participation. Alexandris et al. (2002) found that intrapersonal obstacles act as de-motivators for leisure participation, as intrapersonal dimensions such as personality, knowledge and interest predict intrinsic motivation, which in turn influences participation. Interpersonal constraints involve relationships between or interaction of individuals’

characteristics (Crawford and Godbey, 1987) and are most commonly experienced as a lack of another person to participate with. Structural constraints intervene between preferences and participation, meaning once an individual has negotiated why and with whom to participate, he or she must now negotiate the details of how, when and where to participate. According to Jackson and Scott (1999), this stage is the least difficult to negotiate. Included in this stage are concerns such as financial resources, life-cycle or family stage, availability of time, season or climate conditions, availability of opportunities, reference group attitudes to the appropriateness of certain activities and transportation issues.

Lack of time and money are frequently reported structural constraints for leisure involvement. According to Scott (1993), time scarcity is the feeling that one lacks enough time to do all the things that one would like to do and has a significant impact on leisure behavior. Jackson and Dunn (1991) found that time constraints are the most frequently mentioned reasons for ceasing participation in leisure activity and time constraints are also frequently mentioned reasons for not initiating participation at all (McGuire, Dottavio & O'Leary, 1986; Mannell & Zuzanek, 1991). However, Shaw, Bonen and McCabe (1991) found that time and money are less likely to decrease participation than lack of energy or ill-health. Lack of time because of work was the highest rated response of both men and women but those who reported it showed significantly higher levels of participation than those who did not. This is perhaps due to the notion that external constraints can be negotiated through behavioral strategies such as prioritized spending or taking longer lunch breaks, while internal constraints involve the altering of attitudes and preferences (Jackson & Scott, 1999).

### **Wine Tourism**

According to Hall and Mitchell (2000), the majority of wine tourism literature focuses on the supply side of wine tourism, while there is a lack of knowledge regarding the attributes of wine

tourists including demographic, behavioral and attitudinal characteristics. The following discussion of consumer and regional trends, market segmentation, tourist motivation and profiling serve to illuminate the current body of literature addressing the paucity mentioned by Hall and Mitchell. The topics included aid in the understanding of individuals involved in different wine-related activities from wine consumption to wine tourism.

### **Consumer and Regional Business Trends**

In a recent article from *Beverage World* (2007), Pernod Ricard USA's President Alain Barbet commented that "wine is exploding... the market is very vibrant, especially on the premium and super premium side" (p.61). Barbet also discusses the up-and-coming introduction of the world's most expensive champagne to the already booming market, with each bottle priced near \$1,300 USD. Barbet's confidence regarding the future for this product embodies the optimistic attitude of the growing wine market both domestically and abroad.

In Ritchie's (2007) discussion of wine consumption in the United Kingdom, she notes that the UK is the largest wine importer in the world due to the fact that little wine production occurs domestically. As interest in wine increases among the British via such trends as European-style café bars that serve wine alongside coffee and other non-alcoholic beverages and the availability of wine in supermarkets, the occurrence of international wine importation continues to increase. Ritchie also mentions that nearly 61% of adults in the UK consume wine and that this market is expected to expand according to data from Vinexpo (2005) and Key Note Limited (2006).

Another key region in the international wine market is the South Pacific, particularly Australia and New Zealand. An abundance of research regarding wine consumption, wine routes, wine tourist profiles and festival attendees centers on Australia and New Zealand (Carlsen, 1999; Carlsen & Dowling, 2001; Davies & Brown, 2001; Foo, 1999; Hall, 2004; Hall, Longo, Mitchell & Johnson, 2000; Hall & Macionis, 1998; Heaney, 2003; King & Morris, 1998; O'Neill &

Charters, 2000; Sanders, 2004; Weiler, Truong & Griffiths, 2004). This body of research indicates that both domestic and international consumers are gaining increased awareness of and interest in this region as a wine supplier as well as a travel destination.

### **Market Segmentation**

According to Kotler, Armstrong, Brown, Adam and Chandler (2001), marketing involves three primary strategies: (1) mass marketing, which occurs when one product is intended to fit all consumers; (2) product-variety marketing, which means multiple products are designed to satisfy the needs of buyers; and (3) target marketing, which involves focusing certain products for certain segments of the consumer market. Mass marketing has become less common since the 1950's and 60's and companies must adopt marketing orientations in order to hold a competitive edge (Kotler et al., 2001). Segmentation of a consumer market allows marketers to create subsets of consumers based on their common needs or characteristics, similar to the segmentation process involved in specialization research. Market segmentation is similar to the specialization framework, with the exception of the tendency or expectation of individuals to progress along a continuum of involvement. Nonetheless, segmentation is a useful step in the understanding of wine consumers and can potentially be applied to wine tourists.

In a recent approach to segmenting the wine market, Bruwer, et al. (2002) identified five clusters among wine consumers in Australia using a wine-related lifestyle (WRL) approach. The WRL is evaluated based on consumers' desired quality or attributes of wine, shopping practices, wine consumption situations, drinking rituals and the desired consequences of wine consumption. Lifestyles are distinguished from but inherently linked with values, as an individual's lifestyle is his or her dynamic method of value expression. According to Bruwer et al. (2002), this expression is ultimately seen in terms of product and brand consumption. From the data obtained in 272 interviews of suburban Adelaide households, the following clusters were

distinguished: Cluster A, enjoyment oriented social wine drinkers; Cluster B, fashion/image oriented wine drinkers; Cluster C, ritual oriented conspicuous wine enthusiasts; Cluster D, purposeful inconspicuous premium wine drinkers; and Cluster E, basic wine drinkers.

Cluster C is the smallest segment of the sample at 18%, though they drink the highest quantity of wine per week (1.8 bottles) and spend the most money per bottle (\$18.29). This group includes the connoisseurs of the wine market, who are the most likely consumers to be involved with wine clubs and formal wine tastings. They are highly knowledgeable about wines and are open to trying new brands and types of wine. They enjoy ritualistic behaviors such as decanting and cellaring and accordingly have a strong interest in specialized equipment to suit such activities. This group is mainly under age 34, male, with high levels of education and 61% have annual incomes over \$70,000.

The largest segment is Cluster D at 25% of the sample. This group involves mostly couples ages 35-54 with high education levels and very high annual income (36% at \$100,000 or greater). This group is the least likely to be concerned with image or fashion, but is the most likely to drink socially and to pre-plan purchases. Members of this segment appreciate brand variety, as their propensity for safe brand buying is very low. This group consumes the second highest average quantity of wine per week and spends the second highest average amount per bottle, next to the connoisseurs. This is a very important target market as they have a great deal of discretionary income and high consumption rates.

The details of Bruwer et al.'s (2002) clusters are important not only as marketing tools that aid in the profiling and targeting of consumers, but also as an empirical insight into the specialization that has been shown to exist among wine consumers. Differing behaviors, values and orientations have been described in this study that relate to Bryan's (1977) initial propositions. Varying degrees of involvement, monetary and social commitment, equipment and

resource preferences, social setting preferences, types of experiences sought and even “social world” reference groups, all of which were described as important factors in specialization by Bryan (1977, 1979, 2000), are described in Bruwer et al.’s five clusters.

Carlsen (2004) mentions the need to focus on the younger generation as a long-term target market, rather than focusing on the traditionally older age group. Carlsen suggests the marketing of wine festivals (Yuon, Cai, Morrison, & Linton, 2004) as well as concerts and weddings held at wineries to attract the attention of the younger wine consumer. Treloar, Hall and Mitchell (2004) further this discussion with a study regarding potential growth among Generation Y as alcohol consumers. They found that in terms of alcohol consumption, youths prefer cheaper alternatives such as beer and spirits. The true area with a potential for growth among these youths involved wine tasting as a leisure activity.

Treloar et al. suggest that marketing should focus on the leisurely side of the wine experience rather than production-oriented processes such as cellaring. The popularity of wine as a marketable experience rather than just a product coincides with the recent shift from material-oriented accumulation toward the phenomena of “experience as the new greed” (M. Gross, COO of AIG Travel Insurance, personal communication on November 2, 2007). One way to obtain the full wine experience is to become immersed in the socio-culturally rich atmosphere of wine destinations (vineyards, wine bars, etc.) and events (i.e., festivals).

## **Motivation**

A primary aspect of wine tourism that has been explored in recent years is motivation (Alant & Bruwer, 2004; Charters & Pettigrew, 2005; Hall, Shaw, & Doole, 1997; Weiler, Truong, & Griffiths, 2004; Yuon, Cai, Morrison, & Linton, 2005). The most common motivation for visiting wine festivals and cellar doors is perhaps rather obviously the desire to taste and purchase various wines, as reported by Alant and Bruwer (2004) and Yuan et al. (2005). Both

studies involved questionnaires administered to individuals participating in or having recently participated in wine tastings and also revealed a similar secondary motivation, namely the desire to experience specific local or regional wines. This finding provides support for the proposition that wine consumers might be motivated, or pushed, to travel in order to taste regional wines at the site of production.

Other commonly reported motivations in Alant and Bruwer and Yuan et al.'s studies included the desire for a holiday/travel trip, relaxation, sightseeing and general enjoyment of special events. The range of specialization noted among these explanations for attending wineries and festivals may indicate the levels of specialization present in the wine tourists surveyed. For example, perhaps the less specialized individuals simply happened upon the wineries or festivals and decided to give it a try, while the highly specialized travelers planned their entire vacations around visiting a particular region or festival. Weiler, Truong and Griffiths (2004) found six key motivations for attending a winter wine festival (in descending order of significance): cultural exploration, known-group socialization, event novelty, external socialization, family togetherness and recovering equilibrium in an individual's life.

Hall, Shaw and Doole (1997) identified cultural background as a key ingredient in understanding the motivations of wine consumers, as well as consumers in any market. Culture is defined as the "norms, beliefs and customs that are learned from society and lead to common patterns of behavior" (Assael, 1997). In the analysis of Australian, Greek, Italian and German cultures, Hall et al. (1997) found that certain motivating factors are cross-cultural, while others are not. For example, "to satisfy a thirst," to be "stylish" and to consume a "natural drink" were common motives among all four cultures. On the other hand, Germans indicated a greater likelihood to celebrate an event with wine (and to drink wine in order to have fun) than did

Greeks, Italians, or Australians. This study highlighted the need for wine tourism researchers to be mindful of cultural differences when studying motivation among international tourists.

On a different note, Charters and Pettigrew (2005) explored a philosophical application of aesthetics to the experience of wine tasting. Through empirical research involving focus groups in several metropolitan wine centers of Australia – Sydney, Adelaide, Perth, Margaret River and McLaren Vale – Charters and Pettigrew conclude that wine is indeed perceived as an aesthetic experience similar to the enjoyment of music. One may infer that this enjoyment can serve as a motivation for wine tasting and perhaps even wine-related travel, as the aesthetic experiences of art and music encourage their own brand of niche tourism (Novelli, 2005).

### **Profiling the Wine Tourist**

Charters and Ali-Knight (2002) venture the statement that “it is generally acknowledged that there has been little research into the nature of wine tourists, their motivation and intentions and how they can be effectively segmented” (p.311). In order to rectify this deficit, two primary steps must be taken. First, the consumer must be categorized demographically considering age, education, gender and family background. Second, a psychographic profile must be deduced by assessing values, attitudes, opinions and lifestyles among customers.

With these goals, Charter s and Ali-Knight surveyed winery visitors in the Margaret River and Swan Valley regions of Western Australia. They distinguished four segments based on such factors as wine education, interest in wine, interest in the pairing of food and wine, desire to acquire wine tasting skills, amount of prior winery visits, age, gender, education, occupational type, etc. The authors labeled these four segments: *wine lovers*, *connoisseurs*, *wine interested* and *wine novices*. Wine lovers were highly wine-educated and indicated high levels of interest in all aspects of the wine experience, including such general lifestyle components as pairing food and wine and furthering their knowledge through watching television programs about wine. The

connoisseurs, actually a subset of the wine lovers, demonstrated an extreme interest in wine knowledge, skill and lifestyle. Connoisseurs tended to be male, university-educated and holding professional or managerial occupations.

The wine interested group also indicated high levels of educational attainment and interest in obtaining wine-related knowledge. However, this segment was less interested in lifestyle-related elements of the wine experience than were the wine lovers. Finally, wine novices enjoy a more active visit to wineries than just tasting, including vineyard tours. Novices are most likely to visit a winery due to proximity or happenstance rather than actively seeking the experience. The fact that the study participants fit so well into distinct segments supports the claim that there is no “stereotypical wine tourist” (p. 312), but rather a broad range of consumer types with varying backgrounds, motivations and values regarding wine tourism.

In contrast, Weiler, Truong and Griffiths (2004) found that an average profile for attendees of a wine festival located outside Melbourne, Australia was much more apparent. The average visitor was female, working full-time, between the ages of 45 and 64 years old and earning a household income of AUS \$78,000 to \$103,999. Visitors tended to be first-time festival attendees primarily motivated by a desire to gain knowledge about wine, to socialize and to increase their cultural knowledge of the wine experience.

The South African wine tourist shows both similarities and differences when compared to the Australian wine tourist, as indicated by Tassiopoulos, Nuntsu and Haydam (2004). The average age range was lower than Weiler et al.’s (2004) finding, ranging between 25 and 34 years old. The average wine tourist was a married male with children under the age of 6, holding a professional occupation with a post-secondary education level. Other characteristics include a reportedly high level of discretionary time and income. In terms of psychographics, the average visitor was on a day holiday with family or friends having driven their personal vehicle to the

site in order to sample and buy wine as well as to socialize. Tassiopoulos et al.'s findings do not indicate the wine-related education background or desire to obtain such knowledge among South African wine tourists, perhaps reflecting the relative youth of the agri-tourism industry's popularity in this country.

### **Summary**

Recreation specialization is a leisure theory developed in the 1970s, which proposes that activity participants can be categorized according to shared attitudes, behaviors and cognitive characteristics. Furthermore, these characteristics have the tendency to progress into increasingly specialized preferences throughout an individual's involvement in an activity. Opposing participation in leisure activities are intrapersonal, interpersonal and structural constraints. The study of constraints to leisure originated in the 1980s and, much like specialization, the concept of constraints has developed over time. While originally considered barriers to participation, constraints are now seen as obstacles to be negotiated. Likewise, as specialization was originally conceptualized as a framework for understanding outdoor recreation, it has been applied to a greater variety of leisure-related activities in recent years. The study of wine production and consumption has also indicated a shift in recent years, focusing on the demand-oriented aspect of wine rather than the supply side. This shift, beginning in the late 1990s and expanding into the new millennium, has created an opportunity for the theoretically-oriented study of wine consumers and tourists, particularly from a leisure-based point of view.

Table 2-1. The ABCs of Specialization

Affect	Behavior	Cognition
Centrality to lifestyle - career/spouse choice	Economic investment - equipment	Skills and knowledge Desire to specialize
Commitment - personal investment/identity - social ties	- skill development Past experience - vacations/trips - involvement	Type of experience sought Setting preferences - social - physical

## CHAPTER 3 RESEARCH METHODS

This study constitutes an exploratory analysis of the cognitive, affective and behavioral orientations of individuals involved in wine-related leisure activities. Data collection included two components: in-depth interviews and a questionnaire. The questionnaire was used to ascertain the demographic characteristics of the participants interviewed and information requested by the commercial facilities providing contact with the participants. Non-probability sampling techniques including purposive and theoretical sampling were utilized. Constant comparison and grounded theory methods were implemented during data collection, coding and analysis.

### **Data Collection**

The primary researcher conducted in-depth interviews with U.S. citizens residing in North Central Florida regarding their participation in wine-related activities, including wine tourism. All of the interviews were conducted face to face, lasted approximately 25 minutes in duration and were semi-structured in nature. All interviews were audio recorded for transcription purposes. The semi-structured interview guide was used during all of the interviews (Appendix A). The interviews centered on the following three main questions:

- **Interview question 1:** What are your wine consumption practices? (introduction to wine, previous and current preferences, level of knowledge and skill)
- **Interview question 2:** In what wine-related leisure activities do you participate? (personal definitions of leisure, contributing and constraining leisure factors, physical and social setting preferences, future activity intentions)
- **Interview question 3:** What are your experiences and perceptions of wine tourism? (prior and planned wine tourism experiences, ideal destination preferences, view of wine tourism as leisure)

Interview techniques as described by Ivey and Ivey (2003) were implemented in order to ensure that participants' communications were clearly understood and to elicit further details as needed. These techniques included culturally and individually appropriate attending behaviors, including vocal qualities, eye contact, verbal tracking skills and body language. Additionally, probing questions such as with whom, where, why, how, et cetera were used to encourage details. Immediately following each interview, the primary researcher documented any reflections or preliminary suggestive findings as well as suggestions for the refining of future interviews. At the end of each interview, each participant was given a brief questionnaire containing five demographic questions such as age and education level.

### **Participants**

In order to obtain data from individuals who participate in a range of wine-related activities, participants were recruited via responses to flyers posted in three different location types. The locations included (1) a wine shop; (2) a restaurant offering wine tastings; (3) educational facilities including university and county libraries. Participation was limited to individuals at least 21 years old, the current legal age for the purchasing and consumption of alcoholic beverages in the United States. Purposive sampling was implemented initially in order to target a specific group that engages in wine-related activities. In his discussion of purposive sampling, Babbie (2007) contends that "sometimes it is appropriate to select a sample on the basis of knowledge of a population, its elements and the purpose of the study" (p. 184). Snowball sampling was used when participants referred other individuals they believed to meet the study requirements and would be interested in participating. Once data were accumulated, a theoretical approach to sampling was implemented in order to ensure balanced representation of demographic variables and interest groups as well as to ensure the attainment of saturation regarding the theoretical concepts that emerged from the data. Once interviewed, each

participant was assigned a pseudonym and identification number in order to protect the anonymity of participant identities.

Theme saturation was reached when a total of 15 participants were interviewed, ranging in age from 24 to 64 years with a mean age of 42 and median of 45 years (Table 3-1). Five interviewees were male and ten were female. All of the participants were Florida residents except one, who primarily resides in Ireland. The majority of participants have resided in multiple states, though this was not directly addressed in the interview. Twelve of the participants were employed full-time, two were full-time students and one was a homemaker. In terms of highest level of education achieved, one participant was a high school graduate, two participants had obtained an associate's or technical degree, eight had earned a bachelor's degree, two had earned master's degrees and two had earned doctoral degrees. Two participants' annual household incomes for 2007 were \$25,000 or less (these were the full-time students), four participants indicated incomes between \$25,001 and \$50,000, one indicated \$50,001 to \$75,000, four indicated \$75,001 to \$100,000, two indicated \$100,001 to \$125,000 and two indicated \$150,000 or more.

### **Data Analysis**

Interviews were transcribed from digital audio format to text format. The transcripts were proof read to ensure the accurate and complete documentation of the conversations. A second review of the data involved the insertion of qualitative transcription conventions designed to represent specific language and tone implications such as interruptions in dialogue, content emphasis, tone changes, pauses and changes in volume and speed of the dialogue. This information was used to contextualize each statement with the affect indicated by the participant, allowing a better understanding of the emotion associated with the responses (e.g., interest,

frustration and excitement). A member check was performed via electronic mail allowing participants to verify their statements once transcribed, ensuring content validity.

Grounded theory methods (Strauss & Corbin, 1998) and constant comparison were utilized to code interview data in order to reveal concepts regarding the topic of leisurely wine activity involvement. Categories based on the open, axial and selective coding of the data were created with the assistance of multicolored highlighters for the identification of repeated concepts during open coding and note cards for the contextual grouping and sub-grouping of participant-identified words and ideas. Grounded theory methods allowed for the inductive analysis of themes and concepts indicated by the data in the formulation of a grounded theory. Data obtained from the questionnaires administered after each interview were analyzed to generate descriptions of the entire sample. Individual demographic profiles were used to contextualize the participants' interview responses.

Table 3-1. Participant Demographics

Name	Age	Specialization	Gender	Employment	Education	Household Income
Jon	44	High	Male	Full-time	Bachelor's degree	\$150,001 or more
Melissa	29	High	Female	Full-time	Bachelor's degree	\$50,001 to \$75,000
Janice	55	Medium	Female	Full-time	Master's degree	\$75,001 to \$100,000
Carrie	47	Medium	Female	Full-time	Bachelor's degree	\$100,001 to \$125,000
Erin	52	Medium	Female	Full-time	Bachelor's degree	\$75,001 to \$100,000
Julia	50	Medium	Female	Full-time	Associate's degree	\$75,001 to \$100,000
Hal	64	Low	Male	Full-time	Doctoral degree	\$150,001 or more
Mark	26	Low	Male	Full-time	Bachelor's degree	\$25,001 to \$50,000
Kate	24	Low	Female	Full-time	Master's degree	\$25,001 to \$50,000
Dirk	49	Low	Male	Full-time	Doctoral degree	\$75,001 to \$100,000
Debbie	38	Low	Female	Full-time	Bachelor's degree	\$100,001 to \$125,000
Anne	29	High	Female	Student	Bachelor's degree	\$25,000 or less
Claire	26	Low	Female	Student	Associate's degree	\$25,000 or less
Grace	52	Medium	Female	Homemaker	High school	\$25,001 to \$50,000
Mike	45	Medium	Male	Full-time	Bachelor's degree	\$25,001 to \$50,000

## CHAPTER 4 RESULTS

Themes and subthemes were identified in the data as a result of the coding process. Two over-arching themes emerged from within the data: wine as leisure and wine as tourism. Five subthemes of wine as leisure were identified: leisure meanings, constraints to wine as leisure, wine-related activity preferences, the role of learning and socialization into wine. Four subthemes support wine as tourism, including destination preferences, likelihood to engage in wine tourism, wine tourism constraints and wine tourism as an epiphenomenon to other types of travel. Each theme and subtheme is contextualized by the demographic characteristics and level of specialization reflected in each participant.

Levels of specialization emerged from the data, as participants demonstrated similar affect, behavior and cognition regarding wine. Similarities in affect (Table 4-3) occurred regarding two concepts: 1) the centrality of wine to an individual's lifestyle as expressed through frequency of involvement in various types of wine activities and 2) commitment to wine, as evidenced by social ties and personal identities associated with wine. Behavior (Table 4-1) encompassed three concepts: 1) past experience and economic investment in wine activities, 2) prior wine tourism patterns and 3) wine preferences, or equipment preferences. Cognition (Table 4-2) is the largest category, including five concepts: 1) level of knowledge, 2) level of skill development, 3) physical and social setting preferences, 4) the type of experience sought, or what contributes to the experience of leisure for each individual and 5) the level of interest in wine, or the desire to specialize.

Based on their statements regarding each concept, the participants emerged as members of three levels of specialization: high, moderate and low. The participants with high levels of specialization were Jon, a 44-year old business traveler; Melissa, a 29-year-old professional; and

Anne, a 29-year-old graduate student. All three of these participants have achieved a bachelor's degree as their highest level of education, though their household incomes range from below \$25,000 to above \$150,000 annually. Each of these individuals indicated a multitude of activity involvement and frequency of participation, prior wine tourism to multiple locations, specific wine preferences, moderate to high levels of knowledge and skill development, specific setting and experience preferences, high levels of interest in wine and a desire to continue learning, as well as meaningful social and personal ties to wine.

The remaining participants were equally distributed between moderate and low levels of specialization. The moderately specialized individuals were Janice (age 55), Carrie (age 47), Erin (age 52), Julia (age 50), Grace (age 52) and Mike (age 45). This group primarily consists of middle-aged women who participate in tastings occasionally and enjoy drinking wine while cooking or dining with friends and family. They can name specific varieties that they prefer, though they have low to moderate levels of tasting skills and knowledge. They have a moderate level of interest in learning more about wine and demonstrate low to moderate levels of commitment to wine. Most hold bachelors or associate degrees and their annual household incomes are above \$25,000 and below \$125,000.

The six individuals with low levels of specialization are Hal (age 64), Mark (age 26), Kate (age 24), Dirk (age 49), Claire (age 26) and Debbie (age 38). This group varies greatly in terms of age (24 to 64 years), education (associate to doctoral degrees) and income (less than \$25,000 to over \$150,000). The common bond among this group is their low level of interest and expertise in wine. They infrequently participate in a limited range of wine activities, have general wine preferences, little interest in learning more about wine and low levels of social or personal commitment to wine. The common trend among all three levels of specialization is that every individual expressed a level of progression toward increased knowledge and preferences for wine

over the years of their involvement, which is described by Scott and Schafer (2001a) as being a key component to specialization.

## **Wine as Leisure**

### **Leisure Meanings**

The interview participants provided a range of responses when asked what constitutes leisure for them. Leisure was loosely defined by the interviewees as a period of time or activity that is pleasurable, social, free of obligation and freely chosen. Only one individual did not describe any components of leisure; Hal, a 64-year-old man with a low level of specialization, stated that the concept of leisure did not apply to him and offered no elaboration of this statement. Other individuals, such as those with high levels of specialization, described multiple components of leisure. All three individuals with high specialization levels described time, activity, enjoyment and non-obligation as their primary components of leisure. Jon, a 44-year-old man who participates in home viticulture and demonstrated a high level of specialization, summarizes the concept of leisure as follows:

Leisure is the combination of time and activity that is enjoyable and is not directly related to fiscal income or obligatory duties, i.e., I'm not getting paid for it, it is not maintenance or cleaning related and if I don't do it there are no negative consequences.

The lack of responsibility, obligation or goals to achieve was the most commonly indicated leisure factor, spanning all three specialization levels. Mike is a 45-year-old man of moderate specialization and enjoys wine as an escape from daily obligations. He notes that "leisure is anytime that I'm doing something that I prefer rather than have to do." This statement implies both a freedom of choice and a lack of obligation. Freedom of activity choice is indicated as an important component of leisure by both Mike and Mark, a 26-year old with a low level of

specialization. Mark states his opinion regarding choice with no hesitation, noting “Leisure time involves spending time doing what I want.”

Also vital to the concept of leisure is activity; the majority of participants in all levels of specialization stated that leisure involves activity. Some participants specifically used the term activity in their leisure definitions, while others implied the concept via words such as “doing” and “going.” Anne, a 29 year-old woman who enjoys wine for the fun of it and is highly specialized, was the only participant to indicate that leisure can be time spent without activity “just relaxing and not thinking about anything.” Anne also notes the importance of being stress-free: “leisure would be anything that doesn’t stress me out (in a bad way).” Slightly less than half of the participants described leisure as enjoyable, pleasurable, relaxing or non-stressful. Melissa, a 29-year old woman with a high level of specialization indicated the importance of pleasure by stating “I define leisure as any time during which I have no goals I have to achieve other than to enjoy myself.”

The majority of the participants also described wine-related activities as leisure experiences. All of the characteristics identified as comprising general leisure were also associated with wine-related leisure; wine-related activities are experienced as freely chosen, social and enjoyable activities that occur during an individual’s non-obligatory or free time. Mike describes his vision of wine-related leisure as follows:

For me, wine drinking is a state of mind, a way to escape day-to-day normality. A way to step into a place where only good people, good feelings and good thoughts exist. There are only family, friends and beautiful vistas. Displeasuring thoughts do not exist in wine country.

Not only are the same characteristics present, but the same detracting factors exist, as well. The interjection of obligation or responsibility is detrimental to both types of leisure. For example, younger participants indicated a concern for drinking and driving while participating in

wine activities; two of the three participants under age thirty stated that the stress and responsibility of avoiding a citation for Driving Under the Influence was a constraint to their experience of wine-related activities as leisure. For instance, when asked what might detract from his experience of wine tourism as leisure, 26-year-old Mark stated “I would have to find a driver or risk a DUI or a car accident.” At age 29, Anne agrees: “I have been to a couple of vineyards, mainly in North Carolina. The problem is, every time I get the idea to go to a vineyard, I’m driving and then the whole drinking and driving thing happens.”

### **Constraints to Wine as Leisure**

Almost two-thirds of participants indicated that wine activities are leisure. Individuals with moderate to high levels were more likely than those with low levels of specialization to describe wine as leisure. Several participants expressed concern over negative social circumstances that diminished their enjoyment of wine-related activities. These individuals ranged in age from 24 to 64 and ranged from low to moderate levels of specialization. The youngest participants, Kate and Mark, demonstrated low levels of specialization and indicated a definite concern for being perceived as overly indulgent. Mike and Janice, who possess moderate levels of specialization, expressed frustration resulting from direct contact with staff members at wine shops and tastings, as well as with fellow participants. Both the eldest and youngest participants (Hal and Kate, respectively), indicated a tendency to drink out of social necessity. Hal demonstrated the lowest level of specialization among the interviewees and indicated no interest in wine. Despite the indicated constraints, Mike, Janice and Mark describe wine as leisure while Kate and Hal disagree. This suggests that individuals with even slightly higher levels of interest or involvement in wine are more likely to successfully negotiate social constraints.

The apprehension of being judged or negatively perceived by friends, family or unknown individuals can influence participants to drink wine in lesser quantities or with less frequency, as

expressed by Kate who stated that she drinks wine less often now than in the past, as she is “trying not to be such an alco.” Kate, who is a 24-year-old with low interest and knowledge in wine, implies a negative social perception related to the consumption of alcohol. Mark, a 26-year-old who also has little knowledge and interest in learning about wine, used the term “alcoholic” in a joking manner when describing the quantity of wine he drinks. It appears that individuals with higher levels of specialization are less likely to worry about being perceived as overindulgent, as Melissa and Anna are both under age 30 and did not report any concern for negative social perceptions. This suggests that those with higher levels of specialization attribute different meanings to wine, i.e., they view wine activities as more than just drinking alcohol.

In some instances, the desire to be accepted by an individual’s social environment rather than personal interest in wine may result in *greater* levels of wine consumption, as well. Kate felt influenced by social situations to drink both with lesser and greater frequency – to drink less due to social judgment and greater out of situational necessity. When asked if wine-related activities are leisure, Kate stated “yeah, sometimes, but sometimes it feels more like a social necessity when everyone else is drinking.” Hal and Kate indicated that they were more likely to drink wine as a social necessity than as a leisure endeavor, especially during events such as parties. Hal, who has the least amount of interest in wine, stated that he only drinks wine at parties and receptions.

Other negative social impacts on wine activities as leisure are the pressure of sales people and the experience of others engaged in the activity as being classist, or “snooty.” When asked what has detracted from his experience of wine as leisure, Mike emphatically stated “sales, sales, sales, sales and then there are salespeople, salespeople, salespeople.” Mike enjoys wine as a distraction from daily worries and the stress of being approached by salespeople in a wine shop or winery greatly detracts from his experience of leisure. On the other hand, 55-year-old Janice

who enjoys tastings once a month noted that in “a couple of places in California, I felt like I wasn’t dressed well enough or important enough for them to notice me. Very irritating and takes all the fun out of it.” Also, Kate indicated “snooty yuppies” as one of the primary detractors from her enjoyment of wine activities.

### **Activity Preferences**

In terms of wine-related leisure activity preferences, wine tastings were the most popular activity type across all levels of specialization, with almost half of the study participants preferring it. Two of the highly specialized and two of the moderately specialized individuals indicated winery tours and visiting vineyards as their favorite activities. Melissa stated that her favorite activity is “going to vineyards because I love to travel and I love to try new things. I may potentially have a new favorite next month of ‘wine pairing with tasting menu’ because I’m going to V& A’s and getting the wine pairing.” Pairing wine and food over dinner and in specialty classes was popular among the moderately to highly specialized participants. Only one participant with a low level of specialization, Claire, indicated an interest in pairing.

Past experience appears to play a role in activity preference, as the majority of interviewees have participated in wine tastings and this is the most commonly favored activity. A smaller number have participated in winery tours, vineyard visits, or list drinking wine with dinner as one of their frequent wine-related activities, presumably resulting in the lesser popularity of wine pairing and site visits. Drinking wine with dinner occurs frequently for a majority of the participants, though it was only considered a wine-related activity by a few participants and was preferred over other activities by even fewer. Several participants – two with low levels of specialization and one with a moderate level – either did not participate in wine-related activities or did not indicate a favorite activity. As suggested by these results, individuals with increasing

specialization levels participate in a broader range of wine-related activities and are better able to choose a preference based on their experiences.

One-third of the participants described reading about wine as their least favorite activity. Reading was described as boring and biased. Grace, a 52-year-old woman who enjoys wine when cooking dinner and relaxing with friends, described wine magazines as “stuffy.” Claire, who attends tastings rarely but is interested in learning about pairing, attributed her lack of enthusiasm for reading about wine to her kinesthetic learning style with the statement “...I am more of a tactile person and I like to be able to touch and taste instead of reading it.” Mike enjoys wine primarily at home and has a low-to-moderate level of wine knowledge and tasting skills. He, too, finds reading to be the least enjoyable wine activity, stating that “reading does not convey any actual sensation and is always skewed by the writer’s opinions.” The enjoyment of reading about wine appears to be correlated with a high level of skill and knowledge, as well as extensive past experience with wine activities in general. The most highly specialized participant, Jon, was the only participant to indicate an enjoyment of reading wine-related catalogues, magazines and guidebooks. He enjoys “everything about wine,” as explained by his life-long exposure to wine and enduring efforts to remain involved:

When I lived in Ontario, I visited the Niagara region frequently and visiting one or more wineries became a regular excursion. Books have always been a relaxing way to explore something I am interested in. My father made his own beer and relatives and neighbors made their own wine, so trying to make wine seemed like a fun experiment. When it was successful after the first try (not the greatest wine, but drinkable), it became a minor hobby for a while.

Today, Jon’s involvement can be described by the following statement:

I read wine magazines occasionally and receive a monthly catalog/guide from the Ontario, Canada Vintages store, which carries premium wine, spirits and beers.... if I visit an area that has a winery, I try to visit and participate in tastings.

## **The Role of Learning**

Wine appears to be a leisure activity that can be enjoyed by those with any level of knowledge or skill, as demonstrated by the range present in the interviewees. However, increasing these levels provides the individual with a higher sense of appreciation for wine. Many participants expressed a greater ability to enjoy wine and wine-related activities due to increased levels of skill in tasting and identifying wines, as well as increased knowledge of wine varietals (a wine made from one type of grape, such as Chardonnay), regions, the viticulture process and their own personal preferences. For Mike, increased knowledge and exposure to wine has changed his level of appreciation for wine, but not his preferences:

Over that past five years, I have very slowly begun to actually be capable of differentiating between vintages and varieties of wines. I've also began picking up the subtle flavors often snobbishly described by wine critics and authorities. I would consider my pallet pretty limited, but the difference is noticeable. These changes have made me appreciate wine more, but really haven't really changed the ones that I prefer.

For most participants, individual wine preferences evolve alongside exposure to a variety of wine in formal and informal settings. For instance, Melissa, a 29-year-old woman who enjoys visiting wine bars, vineyards and festivals explains her knowledge progression as being influenced by both friends and travel:

I have a lot of friends now that drink wine and I've learned a lot from them as far as different wine types and accessories and such. However, most of my skill at wine tasting is derived from infrequent trips to vineyards. I've only been to two (one in Florida, one in North Carolina) so I expect my knowledge will grow in the future. I hope to go to Napa someday.

The two participants with the highest self-ratings of wine knowledge, Jon and Anne, have participated in the greatest variety of activities, with each having participated in four distinct types of activities ranging from home viticulture to sommelier classes. "When first exploring wines, I visited a lot of different wineries and took many tours, learning the various techniques

for tasting. I continue to learn and explore whenever I get the chance” explains Jon. He further describes the process of his skill development as follows:

I have always tried to taste wines properly. Exposure to more and more wines over time has provided experience, so tastes are more familiar. I like to read about wine-growing areas, new wineries and the history of wine and through this my knowledge increases.

Anne gained the majority of her wine knowledge through a personal visit with a vineyard owner and sommelier classes required by her previous employer, an up-scale restaurant in southwest Florida. Anne notes:

One of the wine tastings I went to was more of a one-on-one with a vineyard owner at her house. I think I learned a lot more from that, because I could ask her questions and it was just more personable. I have also been a bartender and a server at upscale restaurants and this one restaurant specifically.... would once a month have us take an hour class on how to present wine and the differences in wine.

As an extension of this knowledge, Anne makes an effort to visit wineries while on road trips and enjoys trying new wines at restaurants. Anne notes “I guess I have learned to appreciate wine more, the taste. Before, I just wanted anything sweet to get drunk, but now I actually enjoy the taste and prefer wine dry, very dry.”

In summary, the more empirical knowledge an individual has regarding wine, the greater their ability to develop personal preferences and further enjoy their wine experiences, though this knowledge is not necessary for the general enjoyment of wine and wine activities. Most wine-involved individuals gain knowledge and develop preferences for wine primarily through the direct consumption of wine, though some of the more committed enthusiasts seek out literature or classes to supplement their experiences. Thus, more highly specialized individuals obtain higher levels of knowledge and skill development through both direct (reading, taking classes, visiting vineyards) and indirect (tastings, dining) methods.

## **Socialization and Socializing in the Wine Career**

Family and friends play a large role in the introduction to wine, the enjoyment of wine-related leisure and an individual's likelihood to engage in wine-related activities including tourism. All but two participants indicated a distinct social component to their introduction to wine. Family was the most common source of introduction, particularly at family dinners and during holidays. Anne explained "my family first introduced wine to me, my mom has always had it with dinner. The more I drank wine, the more I liked it." Mark, who primarily drinks wine while on romantic dates stated "when I was real young, my grandmother would drink wine on New Years and Thanksgiving, but I only tasted it once and hated it." Other socialization methods included participation in tastings and wine classes, choosing wine for a wedding, attending an art show and friends in general. Two participants became interested in wine due to a change in diet for health reasons. Mike attributes his socialization into wine to both his wife's interest while starting the South Beach Diet and his involvement in the exclusive social world of commissioned officers in the Marine Corps:

After joining the U.S. Marine Corps in 1992, I was first made aware that a lot of people, normal people, actually drank wine in preference to beer or mixed drinks. Most drank with meals while some, generally women, also drank (generally white wine) at parties. I began drinking wine when my wife read that it was healthy (healthier than other alcoholic beverages) while on a low-carb diet in 2003. I quickly began to prefer wine over beer.

Social situations continue to play an important role throughout the career of wine-involved individuals, influencing the types of activities participants are exposed to and increasing their enjoyment of these activities. The majority of participants listed family and/or friends as their *preferred* social setting for wine activities. Melissa enjoys wine in a variety of social situations: "I love wine bars with groups of friends but I also like wine with a meal at a nice restaurant or when having a friend over to chat. I don't drink alone." Mike notes "I enjoy wine most when

shared with friends or family. The best social settings are at restaurants with atmosphere or at a select few friends' homes." Mike also shares Melissa's dislike of drinking wine alone, stating "I do everything with my wife or occasionally with close friends, never alone."

In terms of introduction to specific wine-related activities, friends were slightly more common as influences over family and significant others. Melissa was introduced to wine by friends, as she explained "... I know I increasingly got into [wine] because of friends who drank it. I had one friend in particular who loved wine. Her family owns a vineyard in Napa." Friends, relatives and significant others were popular among all specialization levels. When asked with whom they *typically* participate in wine-related activities, the majority of interviewees stated friends and three specifically stated that they prefer to participate with close friends. A strong majority also indicated that they prefer to be with their significant other or spouse. Erin, a 52-year old woman who started drinking wine with her family "during dinner and for special holidays," stated "I like to drink wine with my husband at home. I'm not a big fan of crowds or anything like that." Additionally, all three highly specialized participants indicated travel to wine regions or vineyards as important influences to their interest in wine activities.

### **Wine as Tourism**

The second theme emerging from the interviews is that of wine as tourism. Wine tourism is inspired by the participation in wine leisure, though wine tourists do not necessarily have a great deal of involvement in wine activities. Other factors such as the desire to experience a different culture, share a friend or family member's interest, or the allure of a highway billboard advertising free tastings may bring wine consumers of all specialization levels to wine destinations around the world. Four subthemes of wine as tourism are explored: destination preferences, the likelihood to travel for wine, the role of constraints in wine tourism and wine tourism as an epiphenomenon of other travel.

## Destination Preferences

Participants described their ideal wine tourism destinations in terms of specific geographic locations, as well as particular destination characteristics. These preferences are based on the hypothetical ability to travel anywhere with no constraints. As noted below, constraints can drastically alter the type of vacation or location that is actually visited regardless of ideal preferences. Geographically speaking, the most popular locations were Italy and France. Australia, Europe in general and California were moderately popular and the least popular destinations were Chile, Spain and Germany. While Italy and France were the most frequently described ideal destinations, only three participants listed *both* countries. Italy and France were each preferred by approximately one third of the participants.

Nine key destination characteristics emerged from the interviews, with scenery and landscape as the most popular feature. Moderately popular characteristics included the wine-related historic value of the destination, the type of wine featured in the region and the cultural or social environment present. Somewhat popular were the level of novelty inherent in the experience, the cuisine offered and the opportunity to engage in adventure tourism at the destination. The least frequently mentioned factors were the proximity to home and preferences regarding romance tourism at the destination, though the individual who mentioned romance tourism cited it as being the key factor in her destination choice. When asked which wine-related destination she would like to visit, the highly specialized 29-year-old Anne enthusiastically stated:

Ooh, ooh, probably Italy or Australia. I would say France, but I like Italian men better and Australia is just awesome, plus I like Australian wine. And actually lately I have really enjoyed Chilean wines as well, so I change my mind, Chile is where I would want to go. Plus I could find me a Latin lover, just a bonus.

As mentioned, the primary draw to a destination was the scenery, or “vistas” as termed by Mike. Three participants directly used the word “beautiful” when describing their ideal

destination. Other phrases included “interesting countryside” and “completely different scenery” as positive aspects of a destination. When reminiscing about past travels, Jon described the importance of scenery with the following statement: “wineries are usually located out in the countryside, not in downtown areas, so the drive is usually pleasant with nice views, on less-traveled roads.” This statement brings to mind a sense of escaping from daily routine and crowds through the enjoyment of natural scenery. Mike noted that “wine is about nature and civilization.” This statement indicates a dichotomy between both the enjoyment of the natural world and cultural sophistication that accompany satisfying wine tourism experiences. Scenery was popular among all three levels of specialization.

Culture appears to be a particularly important concern for potential international wine tourists. Of the five participants who described culture as an important factor to their travels, their preferred destinations were France, Italy, Europe and Australia. Jon, who once lived in Ontario, Canada, noted that he preferred to visit the Rhone region in France due to its being a “more relaxed and friendlier part of France.” Carrie described the allure of her ideal destination, Paris, as “the way people show great affection for food, wine, art, day to day stuff and one’s family and friends.” Culture was indicated as a preference by individuals with moderate to high levels of specialization.

The style of wine produced by a destination and the wine-related historical value of the destination were key factors for about one fourth of the participants. Wine style was indicated as a preference by individuals from each specialization level and history was important to the moderately and highly specialized. Mark (low specialization) wants to visit Italy, as his “favorite Chianti’s are from Italy.” Melissa (high specialization) also wants to visit Italy, as she believes “the biggest thing is that wine is historically from Italy and I’d like to go to where it all started.” Mike (moderate specialization) has a similar opinion, as he wants to visit France and Italy

because “they are the oldest civilizations that remain active in wine.” Janice, a 55-year-old with a moderate level of specialization noted “Europe has all the old world and cultural areas I’m interested in. Australia has all the outdoor and exciting adventures I am also looking for. The wine is an added bonus.”

There was a great deal of variation in destination preferences within each level of specialization, however, those with moderate to high levels of specialization indicated a greater interest in culturally and historically significant wine-related destinations. Also, while some individuals found wine itself to be the key “pull factor” encouraging their travel to a particular destination, others found wine to be secondary to other tourism preferences. Specialization level did not offer a clear distinction between those who consider wine to be of primary or secondary importance.

### **Likelihood to Engage in Wine Tourism**

The likelihood of travel to a wine destination can be understood as an equation involving multiple factors (Figure 4-1). The weight, or importance, of each factor may differ between individuals according to personal attitudes and values, as indicated by their specialization level. As evidenced by the participants in this study, the likelihood to travel for wine is primarily a sum of the convenience and availability of a travel opportunity, the destination desirability, social influence, the participant’s general wine interest level, knowledge base and prior experience with wine activities. These factors must also be weighed against the perceived constraints involved with the potential travel experience.

One of the primary factors influencing an individual’s travel decision is the frequency of wine activity involvement in daily life. Two thirds of the participants overall had engaged in wine tourism, five of whom participate in wine activities (viticulture, visiting wine shops, tastings, dinner and classes) at least once per month, two participate occasionally (at least once

per year) and three participate rarely (less than once per year on average). To describe it from another angle, all interviewees who participate in wine activities regularly have engaged in wine tourism. Of those who participate occasionally and rarely, half have participated in wine tourism and half have not. This suggests that individuals more frequently involved in wine-related leisure may be more likely to engage in wine tourism, though other factors play a role in influencing those with less involvement to travel. Brey and Lehto (2007) found similar results regarding daily and vacations activities. They stated that “the more that individuals are involved in an activity in a daily setting, the more they tend to participate in the same activity while on vacation” (p. 160).

This also suggests that individuals with higher levels of specialization are more likely to engage in wine tourism, especially those with moderate to high levels of specialization. Individuals with low levels of specialization or infrequent participation in wine as leisure are more likely to engage in wine tourism due to social or circumstantial influences rather than personal interest or commitment to wine as an activity. For example, Jon who is highly specialized has made a conscious effort to incorporate winery visits into his business travels due to a long-term interest in wine. Mark, on the other hand, has a low level of specialization and visited a vineyard on a trip to Long Island due to its convenience and his girlfriend’s insistence.

### **Constraints to Wine Tourism**

The constraints to wine tourism as indicated by the participants include two general leisure constraints – the lack of time and money – plus the travel-specific constraint of proximity to home and the wine-specific constraint of interest in wine. Nearly every participant cited a lack of money as their primary constraint and over half cited both insufficient time and funds as key barriers to their participation in wine tourism. Only one participant, Hal, claimed neither time nor money as a constraint. Hal has the highest level of education and income of the participants, but

no interest in wine. He is a 64-year-old professional who only drinks wine at social functions and has no interest in wine except as a social necessity. Hal's position demonstrates that a lack of interest in wine, or greater interest in other activities, can deter wine-related leisure participation both in daily life and while on vacation regardless of resources. He very directly stated his lack of interest in wine tourism as follows: "I have no intentions of traveling for wine, as wine is not an interest of mine." Several participants mentioned a lack of interest as well as insufficient time and/or money as primary constraints. The combination of these three constraints greatly reduces the likelihood of an individual to engage in wine tourism.

The proximity of a destination and the overall convenience of an opportunity are important factors in the decision to travel, as they are related to the need for time and money. When asked what influenced their decision to travel in order to engage in wine-related activities, nearly half of the participants claimed proximity to non-wine leisure travel destinations, indicating the importance of convenience. Mike combined two elements in his response regarding what influences him to travel: "not one factor, but desirability of destination and expense would be my key concerns." Anne, a full-time university student, noted "money has been the main factor on why I haven't made it to California yet and why I haven't been keeping up with the hobby as much. It's an expensive hobby." Proximity, time and money are important to individuals from all levels of specialization. Greater levels of interest tend to coincide with moderate to high levels of specialization.

While individuals with little general interest in wine are unlikely to travel solely for wine, they may still travel to wine destinations due to other factors. For instance, those participants who have traveled the greatest distances to engage in wine tourism are not those with the greatest levels of knowledge or interest. Rather, the proximity to other travel destinations and the influence of friends and significant others catalyzed their wine travels. Debbie, a 38-year-old

pilot in the United States Navy with a low level of specialization, describes herself as having low levels of wine knowledge, tasting skills and interest in wine. However, she has visited vineyards and engaged in winery tours in California, Italy and France due to her ability to overcome travel constraints and the proximity of these destinations to other areas of personal and professional interest.

### **Wine Tourism as an Epiphenomenon**

Two thirds of the participants have traveled to wine-related destinations, though half of these individuals specifically stated that they did not travel for the sole purpose of experiencing wine. That is to say, they were already in the area for other travel purposes. Jon, the participant with the greatest level of knowledge and skill, described himself as an “accidental wine tourist,” as he primarily visits wine regions on side trips while traveling for business. Jon explains, “I travel for work or other personal reasons and explore wine-related activities when possible. Until recently, I traveled enough that specific wine-related trips were not practical or required.” Mark was influenced by his ex-girlfriend to engage in wine activities while visiting Long Island, New York. He states “it was something to do and my ex-girlfriend loves to boast that she’s classy.” Melissa has a moderate level of wine knowledge and skill and enjoys visiting wine bars, tastings and dines with friends twice each month. Though she has a high level of interest in wine, Melissa notes “like I said, I don’t travel specifically for wine; it’s just occasionally an added bonus. I hope to continue to engage in wine-related tourism as it meshes with other tourism needs and wishes I have.”

Janice rates herself as moderately knowledgeable and her interest in wine has taken her on unplanned trips: “I went out of my way to visit wineries when I saw their advertising – the ones in Missouri and Arkansas had state sponsored signs on the main roads and then small signs so you could find them. In California, it was pretty much drive down the street.” However, Janice

notes that there is a limit to her interest in wine tourism. She states “I am unlikely to travel strictly for wine related activities – there is only so much wine I can drink and I get bored at ‘looking’ instead of ‘doing’ when I travel.”

Interestingly, the participant with the second highest level of knowledge and skill, Anne, has never traveled specifically for wine. Anne is “still in college,” and finds it difficult to afford trips specifically for wine. Instead, she stops at wineries while traveling on road trips through the southeastern United States to visit friends and relatives. Anne explains “as of now, it’s more if I see a winery I think it will be lots of fun, so I stop.” Of those who had traveled solely for wine, four stated that this occurs rarely or only once in the past. The participant who has traveled specifically for wine with the most frequency, Debbie, has traveled from the United States to France. However, when asked what primarily influenced her travel, Debbie stated “proximity to other places I wanted to see.” Level of specialization did not appear to affect the likelihood to engage in wine tourism as a primary or secondary activity. However, those with higher levels of specialization did appear to make a greater effort to include wine in their travel to various destinations.

### **Summary**

Wine activities ranging from a glass with dinner to the exploration of Italian vineyards are experienced as leisure by the strong majority of participants. As wine activities are a subcategory of general leisure for most interviewees, wine-specific constraints and motivators apply in addition to those pertaining to general leisure experiences. The benefits of involvement in wine activities including tourism are both intrinsic and extrinsic. The intrinsic benefits include pleasure, relaxation, increased wine appreciation and personal knowledge and increased empirical knowledge and skill levels. Extrinsic benefits include positive social perceptions by others and social bonding with family and friends. Unlike other types of leisure, no participants

listed family as a constraint to involvement (Brown, Brown, Miller & Hansen, 2001). Instead, family emerged as both a contributing factor to involvement and to the leisure experience. As a general statement, wine appears to facilitate the enjoyment of whatever is already valued by participants including aesthetics, learning, travel, friends and family.

In terms of likelihood to travel solely for the purpose of participating in wine-related activities, the primary factors are wine interest; social influence; and specific destination attributes such as the culture, aesthetics, type of wine produced on location and the historical value of the destination. Factors such as knowledge, skill level and past experience also influence an individual's likelihood to travel specifically for wine, though to a lesser degree.

Understandably, time and money serve as key constraints to wine tourism. The prevalence of these constraints helps to explain the preference for wine tourism as a side trip to pre-planned leisure and non-leisure travel. Especially important to wine tourism are the convenience of an opportunity and the proximity to other travel destinations.

Specialization allows for the categorization of individuals based on their commonalities, though individuals all have their own unique approaches to leisure and travel. Generally speaking, a higher level of specialization means that an individual is more likely to put forth conscious effort to engage in wine activities both in daily life and while on vacation. These individuals will also have greater awareness of their own preferences for wine, activities, settings and destinations simply as a result of their experiences – the more knowledge an individual has to draw on, the more capable he or she is of forming educated preferences.

Table 4-1. Participant Specialization and Behavior

Name	Age	Gender	Spec Level	Wine Activities	Prior Wine Tourism	Wine preferences
Jon	44	Male	High	Magazines, catalogs/guides, tastings, viticulture	Wineries, vineyards, festivals	Varies, shiraz
Melissa	29	Female	High	Wine rooms/shops, dining	Winery, vineyards, festival	Moscato, ice wine
Anne	29	Female	High	Tastings, classes, dining	Vineyards	Red Zinfandel, Viognier, blends
Janice	55	Female	Medium	Tastings	Wineries, vineyards	White Zinfandel, Pinot Grigio
Carrie	47	Female	Medium	Dining	Vineyards	Bordeaux, Pomerol
Erin	52	Female	Medium	Books, tastings	None	"Not very picky"
Julia	50	Female	Medium	Tastings	None	Chardonnay
Grace	52	Female	Medium	Books, tastings	None	Merlot, Cabernet Sauvignon, Shiraz
Mike	45	Male	Medium	Books, tastings	Winery	Merlot, Cabernet Sauvignon, Shiraz, Chardonnay
Hal	64	Male	Low	None	None	"Hardly any"/Blushes
Mark	26	Male	Low	Dining, tastings	Vineyards	Chianti
Kate	24	Female	Low	Dining	Vineyard	"Usually a red"
Debbie	38	Female	Low	Tastings	Wineries, vineyards	Reds
Dirk	49	Male	Low	Tastings, classes	Wineries	"No preference"
Claire	26	Female	Low	Tastings	None	Reds

Table 4-2. Participant Specialization and Cognition

Name	Age	Spec Level	Knowledge Level	Skill Level	Setting Preferences	Contributors to Leisure	Interest level
Jon	44	High	Moderate-high	Moderate-high	Dinner w/friends and family at home	Social aspects, escape from obligation	Always learning, plans to continue
Melissa	29	High	Low-moderate	Moderate	Varies, not alone Patio preferred	Relaxation	Plans to continue learning/traveling
Anne	29	High	Moderate-high	Low-moderate	Friends, dinner, home, restaurant, "laid back" atmosphere	Fun, enjoyment	Interest in learning in general about wine
Janice	55	Moderate	Moderate	Moderate	Friends, parties, outdoors	Social aspects	Low interest in learning
Carrie	47	Moderate	Low-moderate	None-low	Dinner, café in the evening	"All"	Interest in travel
Erin	52	Moderate	Moderate	Moderate	At home	Relaxation	Interest in tasting
Julia	50	Moderate	None-low	None-low	Dinner, relaxing atmosphere	Relaxation	Increasing interest in general, no time
Grace	52	Moderate	None-low	None-low	Dinner, cooking, friends, family, at home, "anytime"	Not sure	Interest in tasting, developing skills
Mike	45	Moderate	Low-moderate	Low-moderate	Friends, family, restaurant outdoors, in the evening	Escape from obligation	Learned a lot, plateau Increasing interest
Hal	64	Low	Low-moderate	None-low	Parties, home	None	No interest

Table 4-2. Continued

Name	Age	Spec Level	Knowledge Level	Skill Level	Setting Preferences	Contributors to Leisure	Interest level
Mark	26	Low	Moderate	Low - moderate	Dates, friends, at home, windows open	Escape from obligation	Plans to drink, low interest in learning
Kate	24	Low	None-low	None-low	Friends, pub, at home	Social aspects	"One day"
Debbie	26	Low	None-low	None-low	Dinner, cooking, restaurant, at home	Not sure	"Not at this time"
Dirk	49	Low	None-low	None-low	Dinner at home	Travel & tasting	No interest
Claire	26	Low	Moderate	None-low	Dinner, relaxing atmosphere	Tasting	Interest in learning, pairing

Table 4-3 Participant Specialization and Affect

Name	Age	Spec Level	Frequency of involvement	Socialization/Identity	Have preferences progressed?
Jon	44	High	Side trips while on business travel - effort to incorporate	Grew up making wine with father – identity, high commitment	Yes, exposure/variety, learning/reading
Melissa	29	High	With dinner 2x/mo, travel occasionally	Many friends involved, moderate commitment	Yes, exposure/wine bars, travel, friends
Anne	29	High	Tastings/dinner occasionally	Moderate commitment	Yes, exposure/quantity, learning/pairing
Janice	55	Moderate	Tastings 1/mo	Moderate commitment	Yes, exposure, money
Carrie	47	Moderate	With dinner weekly, with friends 1/mo	Moderate commitment	Yes, exposure/variety, travel More inquisitive and open to wine
Erin	52	Moderate	Tastings occasionally	Moderate commitment	Yes, exposure/tastings, learning/reading
Julia	50	Moderate	Tastings occasionally	Low commitment	Yes, exposure/headaches from reds Increasing interest
Grace	52	Moderate	Rarely out of home, frequently at home	Moderate commitment	Yes, exposure/variety, leisure/hobby, learning/pairing, money
Mike	45	Moderate	Rarely out of home, frequently at home	Moderate commitment	Yes, exposure/quantity/variety, risk-taking "No one wants to buy an expensive bottle of bad wine."
Hal	64	Low	None	No commitment	Yes, exposure/variety
Mark	26	Low	Dining/tastings rarely	Low commitment	Yes, exposure/variety
Kate	24	Low	Vineyard once	Low/moderate commitment	Yes, travel/moving to Europe

Table 4-3. Continued

Name	Age	Spec Level	Frequency of involvement	Socialization/Identity	Have preferences progressed?
Debbie	38	Low	Tastings occasionally	Low commitment	Yes, exposure/variety, money
Dirk	49	Low	Tastings/classes rarely	No commitment	Changes in preferences but not in skill/knowledge (not interested in increasing skills/knowledge)
Claire	26	Low	Tastings rarely	Low commitment	Yes, exposure/tastings

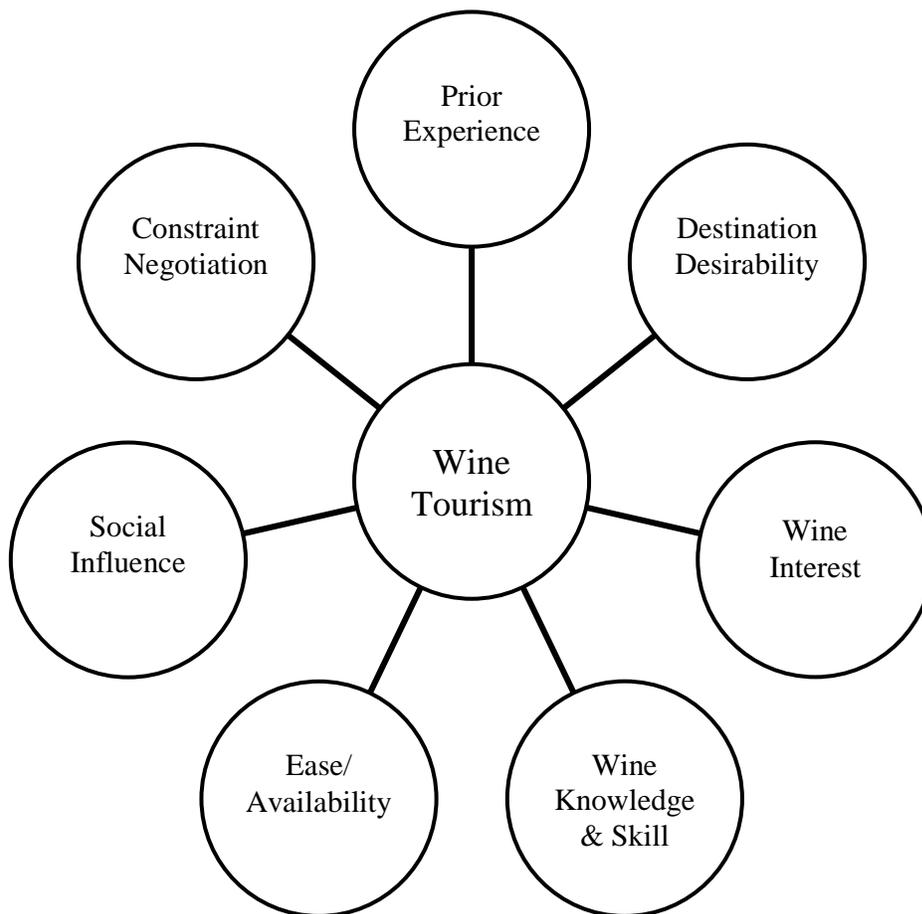


Figure 4-1. Wine Tourism Influences

## CHAPTER 5 DISCUSSION

The two data-emergent themes – wine as leisure and wine tourism – as well as wine-related specialization and constraints are discussed in relation to the literature, followed by a discussion of the resultant grounded theory model of wine-related activities among specialized individuals. Practical and research implications as well as study limitations and delimitations are also discussed. By using grounded theory methods in this study, one of the goals was to develop an understanding of the relationship between wine-related leisure participation and an individual's transition from general to specific attitudes, behaviors and cognition regarding wine, known as the specialization level. A second goal was to examine the link between this specialization level and an individual's ability or likelihood to overcome constraints related to wine-related leisure and tourism.

### **Wine as Leisure**

The participant responses regarding the meaning of leisure reflect the proposed definitions available in the literature. The components of leisure described by the participants included time, activity, pleasure, social interaction, freedom from obligation, freedom of activity choice and escape. The key to leisure appears to be intrinsic satisfaction, meaning that participation brings pleasure. The meanings associated with leisure for these participants seem to concur with the literature. Certainly, Iso-Ahola (1989) stated that “intrinsically motivated behaviors are inherently pleasure- and satisfaction- producing” (p. 252). Dumazedier (1974) described leisure as disinterested (with no utilitarian purpose) and hedonistic. Unger and Kernan (1983) suggest that the leisure experience offers pleasure or gratification as an end in itself, rather than as a means to an end. This definition dates from the ancient Greeks, who spoke of *scholē* (leisure) as a contemplative activity pursued for its own sake or to its own end (de Grazia 1962).

Leisure was described by the participants as "free time," something one perceives as voluntary, without coercion or obligation. Freedom of leisure activity choice allows the participant to exercise autonomy, an integral concept that has its roots in developmental psychology. Erikson's (1959) second stage of childhood development centers on the resolution of autonomy versus shame and doubt. The ability to independently assert ourselves remains integral to our ability to thrive throughout the lifespan. The concept of freedom in leisure participation has been a topic of interest for many decades (Dumazedier 1974; Ennis 1968; Huizinga 1950; Stephenson 1967). As Iso-Ahola (1989) notes, "whenever possible, people prefer and opt for, self-determined and autonomous behaviors" (p.252). Thus, the literature supports the tendency to prefer leisure activities, such as wine involvement, that allow an individual the opportunity to exercise choice and freedom from obligation.

Ryan and Glendon's (1998) utilization of Beard and Ragheb's (1983) leisure motivation scale suggested four motives determining satisfaction in leisure activities – intellectual, social, mastery and escape. These four motives are reflected in the responses of the study participants. Intellectual motivation, or the role of learning, was described as a central component for the enhanced appreciation of wine and increased enjoyment of wine-related leisure by several participants. Charters and Ali-Knight (2000) found that key benefits of education for wine consumers were that it provides a "greater appreciation of what one drinks, that it makes it easier to know what to buy, that it develops tasting skills and that it makes the winery experience more complete" (p.76). Social involvement was also important to the participants of this study. Iso-Ahola proposed that individuals seek interpersonal rewards as well as personal and Beard and Ragheb (1983) discussed a need for interpersonal relationships and the esteem of others. Mastery, in the form of skill and knowledge development, furthers the wine consumer's ability to enjoy a wine-related activity as described by Charters and Ali-Knight and further evidenced by

participant responses. Finally, escape can be viewed as the counterpart to the pursuit of personal and interpersonal rewards (Iso-Ahola, 1989). The desire to withdraw from daily routines in order to relax in a stress-free environment was described as very important to the participants of this study.

According to McFarlane (1994) leisure participant motivations shift across social, skill and affect domains throughout the leisure career. This has been evidenced by the responses of the interview participants, who demonstrated the reality of a wine career that started with the attendance of parties and receptions, transitioned to skill development through wine tasting and eventually shifted toward a greater sense of wine appreciation. Iso-Ahola suggested that these intrinsic rewards become increasingly more important and obtainable through prolonged participation in an activity and that sustained intrinsic motivation is likely to lead to serious leisure (Stebbins, 1992). Iso-Ahola asserts that “those who have a high degree of specialization and commitment to a single leisure activity have been found to look for intrinsic rewards from their involvement, such as self-actualization, self-gratification, self-enrichment and self-expression” (p.269). Prolonged participation in wine-related activities has been shown by the participants to provide intrinsic rewards ranging from casual social enjoyment and personal achievement to a greater awareness and appreciation of wine. Moreover, participants appeared to shift in motivation from social toward affect as their wine careers and specialization levels, advanced over time.

## **Wine as Tourism**

### **Profiling and Segmentation**

The specialization levels identified in this study were comparable to the wine tourist segments identified by Charters and Ali-Knight (2001). The highly specialized individuals encompass the psychographic characteristics of Charters and Ali-Knight’s “wine lovers and

connoisseurs,” indicating high levels of interest in wine, knowledge and skills and lifestyle components such as pairing wine with meals and seeking educational information about wine. The connoisseurs were described demographically as being male, university- educated and holding professional occupations. These characteristics were true of the highly specialized individuals, except that females outnumbered the male at a ratio of two to one and one of the females was still attending graduate school with the intention of transitioning into a professional occupation.

The “wine interested” individuals closely resemble the moderately specialized participants, indicating less interest in lifestyle-related elements of the wine experience. These individuals participate in wine-related activities less frequently than the highly involved and demonstrated lower levels of wine-related knowledge, though they have high levels of interest in wine. Unlike a difference between the wine interested and wine novices identified by Charters and Ali-Knight, there was less of a distinction between the moderate and low levels of specialization in terms of educational demographics. The commonality among these groups appeared to be more psychographic in nature.

The “wine novices” and individuals demonstrating low levels of specialization were very similar in their relatively low levels of wine knowledge, skill, interest, commitment to wine-related activities and lifestyle practices. The less specialized individuals mirrored Charters and Ali-Knight’s statement regarding tourism tendencies: “it is also probable that they would not be wine tourists unless either a wine region was immediately proximate to them, or they happened to be visiting one for more general tourism purposes” (p.316). This statement also applied to the moderately and highly specialized individuals, though often to a lesser degree, as these individuals made wine a higher priority while on vacation.

While more specifically oriented toward market segmentation, Brewer et al.'s (2002) study of Australian wine consumers also shares similarities with the results of this study. The “ritual-oriented conspicuous wine enthusiasts” resemble the highly specialized participants, as they are the smallest segment of both studies, are highly knowledgeable about wines and are most likely to be involved with ritualistic behaviors such as viticulture or cellaring, as well as formal wine tastings and classes. The “basic wine drinkers” resemble the less-specialized participants and characteristic of the remaining clusters – enjoyment-oriented social wine drinkers, fashion/image oriented wine drinkers and purposeful inconspicuous premium wine drinkers – were present among individuals of various specialization levels.

### **Destination Preferences**

The understanding of wine tourism destination preferences as reported by the interviewees relates very clearly to the findings of Brown and Getz's (2005) study of wine tourists in Calgary. Brown and Getz identified five categories of wine-related factors in the destination choice model: 1) tourist variables such as needs, motives, personality, lifestyle, life stage and experience; 2) marketing variables and destination awareness; 3) affective associations of destinations; 4) tourist destination preferences and 5) situational variables, which are essentially structural constraints such as cost and distance barriers. Each of these categories was reflected in the responses of the interviewees.

The tourist variables identified by Brown and Getz included learning about wine and culture, sharing wine tourism experiences with significant others, gaining esteem through acquired knowledge and experiences, wine centrality to lifestyle through serious leisure and involvement and relaxation in wine regions related to idyllic rural landscapes. Each of these tourist variables was described by the interview participants of this study with varying degrees of specialization, as discussed previously. Further, Brown and Getz link the wine tourist tendencies to the

intellectual, social and competence-mastery leisure motivation framework identified by Beard and Ragheb (1983). This link essentially supports the relationship between involvement in wine as leisure and wine tourism as identified by the interviews of this study.

Brown and Getz (2005) also mention recreation specialization (Bryan, 1979) as a possible explanation for the increased specificity of tourist variables that results from higher levels of wine involvement. Regarding this process, Brown and Getz state “those who are highly involved with wine can be expected to explicitly value wine as a central part of their lifestyle and to exhibit behaviors such as joining clubs, making wine (as a hobbyist), reading about it and collecting or cellaring preferred wines” (p.268). This specialized behavior was precisely what was identified by participants such as Jon, Melissa and Anne. Jon in particular had engaged in each of these activities except joining a club, though he was on a mailing list for a specific winery in Canada.

Marketing variables and destination awareness factors primarily relate to those individuals with high levels of specialization, as these factors include preferences for particular wines by origin country or specific appellation, wine tastings specific to their origin, destination marketing organization (DMO)/ wine industry partnerships and personal visits to wineries and wine regions plus word of mouth as travel influences. The more highly specialized individual is exposed to a greater amount of destination marketing through awareness and preference for origin-specific wines. However, these variables may also influence those with moderate levels of specialization, like Janice or Mike, who are interested in wine tourism but admittedly lack information regarding opportunities available.

Brown and Getz’s affective association of destinations as a travel factor was distinctly supported by the interviewees. This category includes the cultural and historic links that favor European destinations, the integral nature of wine identified as a part of the lifestyle in

“authentic” destinations such as France and Italy (also related to food and social atmosphere by several participants) and the concept of a pilgrimage to famous and important wineries and wine regions (MacCannell, 1973). These wine tourism factors were primarily expressed by those with moderate to high levels of specialization, indicating a degree of interest and knowledge about wine as a prerequisite for this type of destination preference formation. Interest in more novel destinations such as Australia, Chile and Germany were rooted in preferences for wines that originate in these areas, rather than the cultural attractiveness of the destination.

The tourist destination preferences category refers to an “evoked set” of known and preferred wine-specific destinations versus general-purpose travel preferences. Brown and Getz suggest that wine-involved individuals create a mental list of possible wine-specific destinations to visit, which narrows as they gain more knowledge of each destination and develop other wine-related preferences as mentioned previously. For instance, as interviewees were asked to describe their ideal wine-tourism destinations, a concise list of preferred destinations was listed by each participant. This suggests that individuals of all wine-related specialization levels formulate an evoked set of wine-specific destinations (Woodside & Lysonski, 1989). The more highly specialized individuals demonstrated a greater ability to justify their destination preferences, citing historical value et cetera, which indicates that the individual’s wine-related leisure and tourism preferences were being used to evaluate potential destinations and therefore reformulate the evoked set.

### **Specialization**

Levels of specialization were evident in the data, as participants demonstrated similar affect, behavior and cognition regarding wine. Similarities in affect (Table 4-3) occurred regarding two concepts: 1) the centrality of wine to an individual’s lifestyle as expressed through frequency of involvement in various types of wine activities and 2) commitment to wine, as evidenced by

social ties and personal identities associated with wine. Behavior (Table 4-1) encompassed three concepts: 1) past experience and economic investment in wine activities, 2) prior wine tourism patterns and 3) wine preferences, or equipment preferences. Cognition (Table 4-2) is the largest category, including five concepts: 1) level of knowledge, 2) level of skill development, 3) physical and social setting preferences, 4) the type of experience sought, or what contributes to the experience of leisure for each individual and 5) the level of interest in wine, or the desire to specialize.

**Bryan's four propositions:** The first of Bryan's (1979) propositions regarding the specialization of fisherman is that individuals become more specialized over time. This concept was also emphasized by Scott and Schafer (2001a) as being integral to the differentiation between specialization and segmentation. The results of this study show that individuals of all specialization levels do report progression throughout their wine careers, even if their progression is limited to preference of reds over whites and so forth. In terms of explaining why wine-involved individuals progress, a question asked by Brown and Getz (2005), progression appears to occur alongside increased participation which is fueled by general interest in wine. Individuals with moderate to high levels of interest in wine will increasingly seek out opportunities to incorporate wine-related activities into their daily lives and vacation patterns, allowing progression to occur naturally.

The second proposition states that highly specialized individuals comprise a social world or subculture with unique values. When viewed as a whole, highly specialized individuals do share similar values and behaviors, though each individual experiences his or her wine-related social world as being limited to the specific partner or group present during their participation. None of the participants indicated that they are members of a wine subculture, though mention of "wine snobs" and "yuppies" indicated that a stereotype of such a group exists. Data regarding this

proposition is inconclusive and would be better understood through a larger population sample of highly specialized wine enthusiasts to determine the nature of group identification, possibly using Unruh's (1979) concept of social worlds and Gahwiler and Havitz's (1998) social worlds scale.

Bryan's (1979) third proposition regards a shift in participation motivation from consumption to an emphasis on the activity's nature and setting. Wine specialists mirror this effect through a shift from hedonistic wine drinking toward appreciation of wine as something to be savored, as well as appreciation for wine-producing regions. This appreciation often translates into interest in travel to wineries and wine regions in order to gain first-hand experience of wine-producing settings, as indicated by the interviewees. Charters and Ali-Knight (2000) also mentioned the greater ability to appreciate wine and wine-related destinations as a result of increased wine education. As an individual becomes more specialized in wine, he or she gains knowledge and appreciation concurrently.

The final specialization proposition suggests that as specialization increases, dependency on particular resource types increases. Bryan (1979) asserts that individuals increasingly seek settings that test their skills. The interviewees with moderate specialization levels tended to express a greater desire to develop their skills through participation in tastings than those with higher levels of specialization. If wine itself is conceptualized as an activity resource, then higher levels of specialization do result in greater dependence on the availability of specific types of wine, as preferences do become more specific.

### **Constraints**

The specialization level of the participants frequently influenced the intrapersonal, interpersonal and structural constraints experienced (Crawford, Jackson & Godbey, 1991). As an

individual's specialization level increases, he or she perceives a more specific set of constraints to be negotiated.

### **Intrapersonal Constraints**

As indicated in the constraints literature, a lack of interest can have a profound effect on the intention to participate in a particular leisure activity and the same applies to wine-related activities. Individuals with low specialization levels and correspondingly low interest levels participate in wine-related activities much less frequently. When they do occasionally participate in such activities it is often due to external or social influences that temporarily outweigh their lack of personal interest, as suggested by McFarlane's (1994) concept of social motivation as a precursor to skill- or affect-motivated leisure participation. Low knowledge and skill levels are sometimes off-putting for the less specialized, as well. However, deficiencies in these technical areas tend to motivate the moderately specialized to participate in tastings in order to learn more about wine, as their interest in wine trumps their lack of skill or knowledge. This tendency was also noted by Charters and Ali-Knight (2000) in their study of wine tourists. Personal preferences differ individually in terms of social and physical environments, though generally relate to specialization level and past experience. Preferences tend to serve as a constraint primarily for the highly specialized, as they have developed more specific expectations and desires. The less specialized travelers have correspondingly fewer preferences and therefore negotiate this constraint with greater ease.

### **Interpersonal Constraints**

While none of the participants indicated a lack of fellow wine-enthusiasts to participate with as a constraint, interpersonal conflict with other participants and staff members at wine facilities were cited by those with low to moderate levels of specialization. These individuals were more likely to discontinue or avoid participation in wine-related activities due to concerns over

negative social interactions such as pressure from salespeople, appearing novice among those with more tasting skills or knowledge, being perceived as overindulgent in alcohol or feeling obligated by social pressure to engage in wine activities when lacking intrapersonal motivation. Higher specialization levels lessened the effect of interpersonal constraints, as individuals appeared to adapt to the social environment through the accumulation of experience in the wine setting. More highly specialized individuals may become aware of the negative social constraints present in wine-related activities and adjust their expectations and attitudes accordingly. As proposed by the literature on perceived crowding, individuals' expectations about a setting appear to exert considerable influence over their evaluation of whether or not it is crowded once they are there (Schreyer & Roggenbuck, 1978; Shelby, Heberlein, Vaske and Alfano, 1983; Westover, 1989). Similarly, individuals with greater levels of prior wine-related activity experience may develop more realistic expectations in general regarding the social environment to be encountered, thereby avoiding disappointment or frustration during participation.

### **Structural Constraints**

Crawford, Jackson and Godbey's (1991) structural constraints including financial resources, availability of time, availability of opportunities and transportation issues were reported by interview participants of varying specialization levels. Two structural constraints discussed by Crawford et al. were not indicated in the interviews. Season and climate conditions were not directly mentioned by the participants, which may be due to the indoor setting of wine tasting and temperate climate required for wine-growing regions. Second, life-cycle and family stage were not mentioned as constraints for the interviewees either. Neither participation in wine-related activities nor the development of specialization were described as being negatively influenced by life events. However, specific family stages may temporarily affect participation

that involves alcohol consumption, such as pregnancy. The influence of family stage on wine-related activity participation is discussed as a future research suggestion later in this chapter.

Financial resources and the availability of time were paramount, with opportunity and transportation issues as secondary concerns. The prevalence of time and money as primary constraints is also indicated in the leisure constraint literature addressing numerous populations involved in a multitude of recreational, leisure and tourism activities (e.g., McGuire, 1984; Samdahl & Jekubovich, 1997; Shaw, 1994; Stodolska, 1998), indicating that time and financial constraints are integral to leisure participation in general. Wine-related leisure and tourism are not exceptions to these structural constraints, as indicated by the participants.

For instance, day and side-trips were common among participants of all specialization levels as behavioral negotiation strategies for time and financial constraints. As Hayes (2004) suggests, shorter and more self-directed activities allow for the negotiation of time constraints. Furthermore, the wine tourism literature indicates the popularity of wine tourism as a day trip among individuals from various socioeconomic backgrounds (Tassiopoulos et al., 2004; Tassiopoulos & Hayden, 2006; Weiler et al., 2004). For instance, Tassiopoulos et al. (2004) found that 73% of the 165 visitors surveyed in four major wine regions of South Africa were “day wine tourists” who lived nearby (p. 56). The current study reinforces the importance of domestic and regional tourism among wine-interested individuals.

Regardless of time availability or financial resources, highly specialized individuals are more likely to participate in wine-related activities more frequently and over a longer time span than those with lower levels of specialization, as these individuals have already negotiated the more radical and difficult intrapersonal constraints. Through their negotiation of internal constraints, these individuals have established the importance of wine-related activities as leisure in their lives thus developing a sense of commitment and investment in the activity. For highly

specialized individuals with greater financial resources and available time, this commitment may result in longer stays at destinations, or may simply result in more frequent day trips. This is certainly true for specialized participants like Jon, who makes frequent day trips to wineries while traveling for business.

### **Resultant Model**

By using grounded theory methods and constant comparison to identify themes in the data, a model of the interactions between specialization, constraints and wine-related activity is proposed (Figure 5-1). The affectual, behavioral and cognitive components of an individual's specialization level seem to both influence and appear to be influenced by the intrapersonal, interpersonal and structural constraints of wine-related leisure and tourism. Further, an individual's resultant participation in wine-related leisure seems to positively influence the specialization level, thus affecting the ability to negotiate constraints. Also, greater frequency of participation in wine-related leisure seems to influence greater participation in wine tourism. Less commonly reported, participation in wine-related tourism may increase the likelihood of an individual to participate in wine-related leisure or act to reinforce previously established leisure patterns. Each of these components is interrelated with the others in a cyclic pattern.

### **Constraint Negotiation and Specialization**

The negotiation of intrapersonal constraints relates to the cognitive and affectual components of an individual's specialization level (Figure 5-2). Cognitive elements include knowledge level, skill level, leisure meanings and interest level while setting preferences and centrality to lifestyle are related to affect. Once developed, specialization levels contribute to the negotiation of intrapersonal constraints by modifying values and attitudes through experience. A higher level of specialization makes it easier to participate in terms of intrapersonal constraints, as an individual has higher levels of interest in and commitment to an activity, is confident in his or her

knowledge and skill levels, has leisure meanings that place value on wine-related leisure benefits and have established preferred locations at which to participate (and interpersonally speaking, have established participation partners). As Scott and Schafer (2001a) suggest, achieving progression in specialization hinges on the desire to do so. However, an individual must also overcome intrapersonal obstacles at a rudimentary level in order to initiate participation and therefore develop a level of specialization (Brown & Getz, 2005). This establishes the apparent cyclic relationship between specialization and constraints.

The negotiation of structural obstacles allows for specialized behavior to occur and develop, including past experience, economic investment, vacation patterns and “equipment” or wine preferences. However, progression through specialization levels creates more specific constraints as preferences and experiences sought become more specific and potentially more difficult to obtain. For example, an individual with low wine-related specialization will have more general preferences regarding which winery to visit and will be more likely to participate wherever is most convenient. Contrastingly, an individual with specific wine and destination preferences maybe forced to overcome the specific set of constraints involved with achieving the travel goal. Essentially, an individual with low levels of specialization may be most challenged by intrapersonal and interpersonal constraints, while moderately and highly specialized individuals may find structural constraints to be more challenging. Structural constraints are reported in the literature as being less difficult to overcome (Jackson et al., 1993), which explains the greater likelihood of continued involvement among moderately and highly specialized individuals than those of lower levels.

### **Wine-related Leisure and Tourism**

As indicated by the data, participating in wine-related tourism and leisure activities such as attending tastings and sommelier classes occurs alongside the development of specialization,

which appears to be an activity-specific phenomenon. While it also appears true that the negotiation of appropriate constraints precedes participation in wine-related leisure and tourism, an individual's specialization level, as developed through said participation, in turn affects the individual's motivation to continue participation thereby overcoming constraints with greater ease. The result of this reinforcement cycle is that individuals tend to increase in specialization level, or progress, as indicated by the recreation specialization literature (Bryan, 1979; Scott & Schafer, 2001a) and the participants of the current study.

Also indicated by the data is the importance of wine-related leisure participation as a precursor to wine tourism. As an individual increases his or her frequency of participation in wine-related leisure, a greater commitment to the activity develops and the individual seeks to continue this activity while on vacation. Wine-specific travel is also more likely to occur among moderately and highly specialized individuals, as they tend to indicate a greater interest in historical or classic wine destinations, are more interested in the wine production process and are interested in visiting specific wine regions due to their preferences for wines originating in those respective regions.

Wine tourism in itself may also influence an individual with little or no prior interest in wine to pursue wine-related activities as leisure in the future. Many individuals participate in wine tourism as a side-trip to a more general tourism experience and find that they have an interest in continuing participation in wine-related activities. Likewise, those who are already involved in wine-related leisure may find their commitment and interest in wine to be reinforced by positive wine tourism experiences. This renewed or newly discovered interest in wine may influence the individual's likelihood to progress in specialization level indirectly. Wine tourism may also have a direct influence on specialization level by providing an educational experience, helping an

individual to develop wine preferences within a specific region and altering the type of wine-related experience sought in future endeavors.

In summary, the data indicates that the relationship between wine-related leisure, tourism, specialization and constraints is reciprocal, complex and self-reinforcing. As an individual becomes involved in any wine-related activity, he or she develops the potential to progress in specialization from a novice level to a connoisseur if the desire to do so exists. If this desire to specialize, often simply experienced as an interest in wine, exists within the individual, then he or she is likely to overcome the appropriate constraints and continue participation in wine-related activities. Participation in these activities and wine-related tourism will reinforce the budding connoisseur's interest and facilitate his or her specialization progression. Likewise, if the individual lacks personal interest in wine, he or she is unlikely to participate in wine-related activities frequently or develop beyond a low level of specialization in wine.

### **Limitations and Delimitations**

Several aspects of data collection and data analysis may have limited the purity of this study. Researcher bias in terms of socio-culturally specific values and beliefs may have inherently affected the analysis of interview data. In an effort to mediate this effect, the researcher remained conscious of her assumptions and beliefs to the greatest extent possible and reflective notes were taken during the interviews. Participant responses were based on the participants' ability to recall selected events, which may or may not be accurate, as current reflections on previous experiences, attitudes, values and behaviors may differ from those that were experienced during the initial occurrence of the event. Finally, social desirability response bias may have occurred, meaning that responses may have been influenced by what the respondents perceived as socially desirable. To mediate the influence of this effect, interpersonal rapport at the onset of each interview session was established.

While the use of non-probability sampling limits the generalizability of the findings, this study provides insights into a cross-generational sample of U.S. citizens with varying levels of travel and wine experience levels. The age, gender, education and income variation among the participants reflects the demographics of participants in numerous wine tourism studies conducted worldwide, which suggests that these findings may be generalizable beyond the current study. The population ratio of specialization levels is also consistent with prior specialization research populations, with connoisseurs being less common than those with moderate to low levels of specialization. Nonetheless, the goal of this study was in depth understanding of wine-related activities rather than generalizability of findings.

### **Implications and Future Research**

#### **Leisure and Tourism Research**

This study has contributed to the body of demand-oriented wine consumer and tourist knowledge base, which is to date less extensive than supply-oriented research. Propositions by researchers from various specialties have been examined, including recreation specialization as a theoretical framework for understanding wine-involved individuals, constraint negotiation as applied to the specialized wine-activity participant, as well as the link between everyday wine-related leisure and wine tourism participation. This study has demonstrated that theoretically-based interpretations of the attitudes, behaviors and cognition of wine consumers and tourists are not only possible but helpful in furthering the understanding of this growing niche market.

Brown and Getz (2005) suggest the need for a large-scale random survey of both targeted populations and the general population in multiple countries as the next step in wine tourism related research. This researcher agrees with the statement, especially the use of a large population sample, which could be used to find out if the patterns generated individually in this study could be supported using survey research. Studying the general population would allow for

the empirical examination of wine popularity and among each country as well as the determination of cross-cultural differences in wine-specific constraint negotiation and the specialization process. Targeted samples would facilitate a more in-depth look at members of each specialization level and the evaluation of wine-involved individuals in terms of life-stage, gender, or activity-specific behaviors.

In particular, the relationship between an individual's family stage and wine involvement has been indicated by the current study as a topic of interest for further research. The social interaction of family members was only indicated as a positive influence on wine-related leisure by participants, though studies of other leisure activities have shown family stage to be experienced as a constraint on leisure involvement (Brown, Brown, Miller & Hansen, 2001; Kelly, 1974; Witt & Goodale, 1981). Additionally, marital status and spousal wine interest as influences to wine-related leisure participation were not directly addressed in the current study, though several participants mentioned this phenomenon in the description of their socialization into wine. Wine-specific research regarding this topic of interest would be a beneficial contribution to both the body of knowledge regarding wine consumers and leisure participants in general.

### **Leisure and Tourism Practice**

This study has indicated the importance of various efforts on the part of site management and destination marketing. The importance of information availability to those with moderate levels of wine specialization is clear, as this is a more sizable market than the highly specialized. Also, spontaneous day trippers are a highly valuable market to wine-related businesses and vary greatly in terms of demographic and psychographic characteristics. Both the current study and prior wine tourism studies have demonstrated that day trippers compose the majority of wine tourists and should be considered a target market for wine-related destinations and businesses.

Several participants noted that prior visits to wineries were sparked by roadside advertisements featuring free tastings. The visibility of a destination or facility to passersby is clearly helpful in attracting spontaneous visitors.

As wine tourists are an extremely varied market, there are multiple aspects of the wine experience that should be promoted in advertizing efforts in order to assure maximum returns. The offering of educational tastings would appeal to individuals of every specialization level who possess an interest in increasing wine-related knowledge and skill levels, which is an integral component of wine-related specialization. Also popular among the majority of wine-interested individuals are relaxing social and aesthetic atmospheres, which enhance the leisure experience. Cultural authenticity and the historic value of a destination are key interests of the moderately to highly specialized and emphasis of these qualities would entice individuals with greater levels of wine-knowledge and commitment to your destination. The availability of transportation options is an important factor for many younger individuals, who demonstrate concern for driving under the influence. Thus, advertisement and availability of low-cost shuttles between tasting facilities and local accommodations are recommended. The wine tourist, like many other tourists, is subject to constraints such as lack of time or financial resources. The availability of shorter and more self-directed activities, as well as access to a variety of activities and experiences, would assist individuals in the negotiation of time and financial constraints. Finally, many individuals engage in wine-related activities in order to escape daily stress and find intrusions such as sales pressure to be counterproductive to their leisure experience.

### **Conclusion**

As Charters and Ali-Knight (2002) stated, there is no stereotypical wine tourist. Wine-involved individuals vary greatly in terms of socioeconomic status and demonstrate a variety of motivations for participation in wine-related activities. However, as these individuals gain

interest and experience in wine, they begin to share common characteristics and preferences. These common traits allow them to be understood in terms of a specialization continuum. As this theoretical understanding of the demand side of wine-related leisure and tourism develops, practical implications addressing the constraints and preferences of the wine-interested may become more effective and ultimately enhance the experiences of wine-involved individuals on a global scale.

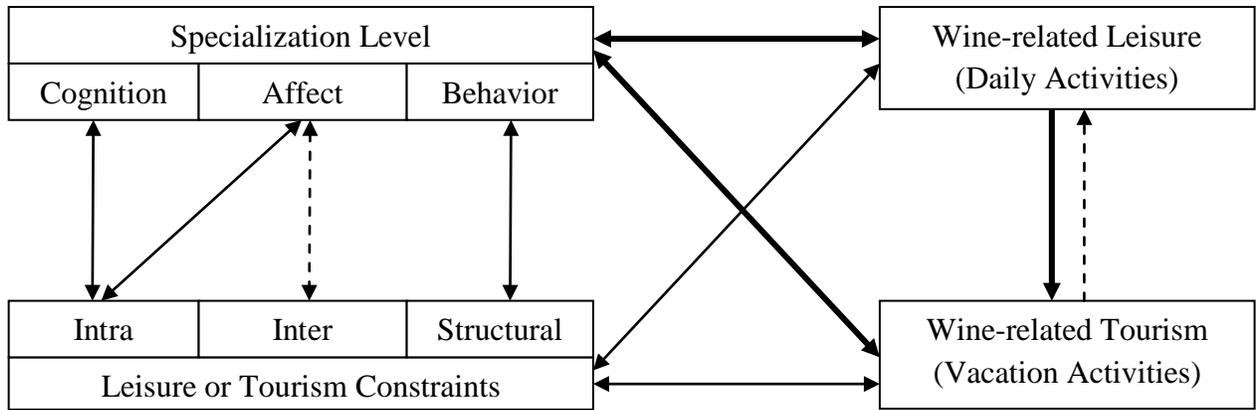


Figure 5-1. Proposed Relationship between Specialization, Constraints and Wine-related Activities

APPENDIX A  
INTERVIEW GUIDE

Specialization and Wine-Related Leisure Activities: An Exploratory Analysis of  
Wine Tourism as a Leisure Pursuit

1. Tell me about your wine drinking preferences.  
Probe: How were you initially introduced to wine?  
What is your current vintage/grape preference?  
How have your preferences related to wine changed over time?  
What contributed to this change/lack of change?  
  
Describe your preferred social setting for drinking wine.  
Describe your preferred physical setting for drinking wine.
2. Tell me about your knowledge regarding wine.  
Probe: What do you consider your level of knowledge about wine to be?  
What do you consider your level of skill in wine tasting to be?  
How has your level of skill and knowledge changed over time?  
What has contributed to this change or lack of change?  
Do you hope/plan to increase these levels and why or why not?
3. Tell me about the wine-related activities that you take part in.  
Probe:  
What kinds of wine-related activities do you participate in? (i.e., tastings, classes, reading books/magazines)  
How did you become interested/involved in these activities?  
Which is your favorite activity and why?  
Which is your least favorite activity and why?  
How often do you participate in each activity?  
What activities do you plan/hope to become involved with in the future?  
What draws you to those activities?  
With whom do you participate and how important is socializing to your enjoyment of the activities?
4. Tell me about your experience of wine-related activities as leisure.  
How do you define leisure?  
Are wine-related activities leisure for you?  
What attributes of wine-related activities contribute to your experience of

them as leisurely?

What factors detract from your experience of wine-related activities as leisurely?

5. Have you ever taken part in wine tourism? (If NO, skip to question 6)

Probe: What are your past experiences with wine tourism? (i.e., visitation of vineyards, attendance of wine events or festivals, winery tours)  
What is the greatest distance that you have traveled to participate in wine tourism?

How often do you travel with the motivation of participating in wine-related activities?

With whom do you travel?

6. Tell me about your intentions regarding wine-related tourism.

Probe: What in particular influenced your decision [not] to travel in order to engage in wine-related activities?  
What do you perceive to be constraints to your wine-related leisure travel?  
What wine-related destination would you like to visit if you had no constraints? (i.e., time, money, obligations)  
What draws you to that destination?

7. Tell me about your perception of wine tourism as leisure.

Probe: What attributes of wine-related tourism might contribute/have contributed to your experience of it as leisurely?  
What factors might detract/have detracted from your experience of wine-related tourism as leisurely?

8. What other aspects of your involvement in wine-related activities would you like to share?

Probe: What are your closing thoughts or observations on your experiences with wine?  
Are there any other things about your interest in wine that we haven't talked about?

APPENDIX B  
SURVEY INSTRUMENT

Specialization and Wine-Related Leisure Activities: An Exploratory Analysis of  
Wine Tourism as a Leisure Pursuit

Introduction: If you agree to participate, the following questions ask you about your demographic background so that we can better interpret your interview statements.

Consent Statement: This questionnaire will take only take approximately 5 minutes to complete. You do not have to answer any question you do not wish to answer and you are free to discontinue participation at anytime without consequence. No compensation will be awarded. If you choose to fill out this questionnaire, you agree to participate in this part of the study.

1. What year were you born? \_\_\_\_\_

2. Are you: 1 = Male 2 = Female

3. What is your current employment status?

1 = Part-time employment

5 = Homemaker

2 = Full-time employment

6 = Currently not employed

3 = Retired

4 = Full-time student

4. What is the highest level of education you have obtained? (Please circle ONE)

1 = Less than high school

4 = Bachelor's degree

2 = High school graduate

5 = Master's degree

3 = Associate or technical degree

6 = Doctoral degree/M.D., J.D.

5. Which statement best describes your TOTAL 2007 annual household income?  
(Please circle ONE)

1 = \$25,000 or less

5 = \$100,001 - \$125,000

2 = \$25,001 - \$50,000

6 = \$125,001 - \$150,000

3 = \$50,001 - \$75,000

7 = \$150,001 or more

4 = \$75,001 - \$100,000

**Thank you for taking the time to fill out this questionnaire!**

**Whom to contact if you have any questions concerning this study:**

Sarah Becker, The University of Florida, Department of Recreation, Parks and Tourism, 320

Florida Gym, PO Box 118208, Gainesville, FL 32611, phone (352) 392-4042 x1301, email:

sarahbec@hhp.ufl.edu

**Whom to contact about your rights as a research participant in this study:**

UFIRB Office, Box 112250, University of Florida, Gainesville, FL 32611-2250, phone (352) 392-0433

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## BIOGRAPHICAL SKETCH

Sarah Rose Becker was born in 1986 at Keesler Air Force Base in Biloxi, Mississippi. The only child of Senior Airman Diana L. Becker and Major Stewart G. Becker (ret.), Sarah has resided in a total of eight US states, as well as Okinawa, Japan. At age 16, Sarah attended the Advanced Academy of Georgia at the University of West Georgia in Carrollton. At age 19, she graduated *cum laude* from the Honors College at UWG with a Bachelor of Arts in psychology, minoring in criminology.

A lifetime of travel and tourism prompted Sarah's enrollment in the Department of Tourism, Recreation and Sport Management at the University of Florida in the fall of 2006. Her academic and personal interest in wine tourism was sparked by her parents' socialization into the wine-related lifestyle. Beyond travel and wine tourism, Sarah enjoys camping, boating, gardening and cooking. Sarah received her M.S. in the summer of 2009, and hopes to obtain a commission as an officer in the US military.