

The Use of Experiential Marketing in the Wine Industry of Paso Robles Wine Country to
Build Brand and Educate Wine Buyers

A Senior Project

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ABSTRACT

The Paso Robles Wine Country Alliance hosted a buyer's retreat November 2-4, 2014. The buyer's retreat consisted of business/restaurant owners coming to Paso Robles for three days of seminars, tastings, tours, etc. about the wine industry in Paso Robles. The hope from this retreat was that the guests would end up buying Paso Robles wine, ultimately helping to brand the wine industry of Paso Robles.

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CHAPTER 1

Introduction

Statement of the Problem

The Paso Robles wine region is growing almost every day, but there are still not enough people that know about it. The Paso Robles Wine Country Alliance consists of wineries, vineyards, and related businesses, and is a collaborative marketing coalition that is meant to unify the wine country. The alliance markets the wine country as a whole in addition to hosting and promoting events relating to the industry. From their office in Paso Robles, they act as a liaison between wineries and the public in order to promote the wine region as a whole.

Because the region isn't as distinguished as others in California such as Napa, Sonoma or Sacramento, the alliance has different events and promotions in order to make the wine region widely known. Annual events include the Wine Festival in May and the Harvest Wine Weekend in October.

Background of the Stated Problem

The Paso Robles wine region has developed a great deal over the past 20 years. The area is now a major economic player in the wine industry, but people still don't really know that much about it.

Winemaking and wine grape growing began in Paso Robles in the 1790s. Today, there are over 200 wineries in the Paso Robles area. The region has specific boundaries set by the Tax and Trade Bureau (TTB) in 1983, which is a federally recognized area.

The Buyer's Retreat is one of the events the alliances hosts. In order to further promote the Paso Robles wine country, the alliance puts on a three-day retreat full of seminars, tastings, networking and learning opportunities in order to further market this unique wine region. People from all over the country that are involved in wine sales have the opportunity to attend this event (if invited), almost all expenses paid. Most people were from somewhere in California, but close to one fourth of the participants were from out of state.

All of the invited participants are involved with wine in one way or another, including owning or managing restaurants, wine bars or working for a grocery store. The 18 participants at this year's retreat were eager to listen and learn about wines from this region.

Purpose of the Study

This study is meant to see how a special event can educate and motivate buyers. The three-day retreat was a method to show off the Paso Robles wine region in hopes that people would purchase the wine by the end of the event.

By applying the diffusion theory to this event, it can be determined if and when the participant is pleased with the wine and will purchase it. The diffusion theory has five steps: awareness, interest, evaluation, trial, and adoption. The participant started by becoming aware of the Paso Robles wine region, but lacking knowledge about it. The theory continues when the participant has interest in the wine region, and desires to obtain more information about it, thus, signing up to attend the buyer's retreat. While at the event, the participant will evaluate if he or she thinks the product is worthwhile. If the

first three steps pass, the participant moves on to the trial, which is actually tasting and learning about the wine.

The trial determines if the participant will move on to the adoption stage, where they will actually purchase the wine. This is mainly based on continuous satisfaction of the region and the time spent there.

This event used experiential marketing to raise awareness and build relationships with potential buyers. By inviting the consumers to Paso Robles for this event, the participants really got a taste of the wine region in three short days. The intention of this event was for the guests to purchase wine either during the event or at the end.

By giving them an idea of both the taste and setting of the wineries in Paso Robles, they got to experience in three days what takes most people at least a week. In just three days the participants experienced learning about the diversity of the region and the high quality of wines produced from a variety of producer tiers. They got the opportunity to taste vintage wines dating back to 1988 as well as

Setting for the Study

This project includes data collection and observation for the completion of a senior project at the California Polytechnic State University, San Luis Obispo. The research also took place at the Paso Robles Wine Country Alliance in preparation for the buyer's retreat. The retreat itself took place at six different wineries, however I attended and observed at only four. The wineries I went to include J. Lohr Vineyards and Wines, Castoro Cellars, Victor Hugo Winery and Cass Winery. The other two wineries that participated in the retreat were Denner Vineyards and Zenaida Cellars.

Research Questions

1. Why is Paso Robles wine of interest to the wine industry?
2. What motivated people to visit the wine region?
3. What makes it something you want to bring back to consumers?
4. What varietals are strongest for this region?

Definition of Terms

Rhone: “A wine described as Rhône-style imitates the great wines that come from the area of southeastern France known as the Rhône Valley” (Napolitano).

Varietals: “Made from or belonging to a single specified variety of grape.”

AVA: American Viticulture Areas; “when a US winery wants to tell you the geographic pedigree of its wine, it uses a tag on its label called an Appellation of Origin.

Appellations are defined either by political boundaries, such as the name of a county or state, or by federally-recognized growing regions called American Viticultural Areas (AVAs)” (Wine Institute).

TTB: Alcohol and Tobacco Tax and Trade Bureau

Organization of the Study

This study is divided into five parts. Chapter 1 discusses the problem, background, purpose, setting, research questions, and terms for this study. Chapter 2 encompasses the literature review used for this study. Chapter 3 includes the methodology used for this study. It contains the data sources, interview material, data

collection and presentation, limitations and delimitations. Chapter 4 is comprised of analysis from the interviews conducted.

CHAPTER 2

Literature Review

Paso Robles Wine Region Brand Identification

Paso Robles defines itself very clearly to the onlooker with their unique wine blends and rich history mixed with modern innovation. “The infusion of youthful passion has had a galvanizing effect throughout the appellation,” (Heimoff, 2013).

Wine enthusiast magazine named Paso Robles “Wine Region of the Year” in 2013 for their “new blood, creativity, and rapidly improving wines.” Paso Robles wine region has branded itself with being unlike any other. “It’s not easy for a wine region to reinvent itself, but Paso is doing it with flair,” (Heimoff, 2013). Because of this “flair,” San Luis Obispo County already records over 1 million winery tourist visits per year, according to the Paso Robles Wine Country Alliance.

“Nontraditional blends flourish in our region,” (Toranto, qtd. in Heimoff, 2013). “Why this is important is that other regions look abide by the traditional paradigm of Bordeaux grapes with Bordeaux grapes, Rhone with Rhone. Paso has defined itself as a region that breaks those rules” (Toranto, qtd. in Heimoff, 2013).

Paso has branded itself as a unique region that makes its own rules rather than following other California regions. “In Paso, we don’t care about boundaries or traditions; we’re just out to make the best wines we can,” (Villard, MCV Wines, qtd in Heimoff, 2013).

With the help of the Paso Robles Wine Country Alliance, Paso Robles wine has successfully branded itself as an outstanding wine region, intending to be different than any other.

What Brings People to the Paso Robles Wine Region

Wine tourism has skyrocketed in Paso Robles because of their positive role in the media. Features in travel, tourism and wine magazines have helped the region stay busy with constant tourism and local support. “The tourism industry locally is buzzing about it,” (Howenstine). “People will want to experience firsthand all of the great things a highly respected wine publication has to say about Paso.”

The Paso Robles Wine Country Alliance plays a huge role in people visiting the area because it is their job to market the region. They do so with an informational brochure that has everything a visitor needs to know when visiting the region. (Figure 8). This brochure has an introduction to the region, annual events, how to plan a trip to Paso, and short descriptions of every winery that is a member of the coalition. Plus, for the tourist’s convenience, there is a pull out map that in the back displaying where every winery is located in the region.

Social media also plays a big role in people visiting the area. “It is vital for companies to have an online reputation because “the Internet is quickly becoming the place where first impressions are formed” (Schiller, 2010, qtd. in Moore, 2011). It can be assumed that people will look up wineries on some outlet of social media before visiting to obtain information and ensure they have interest in the location. The Paso Robles Wine Country Alliance has gathered over 36k “likes” on Facebook (Figure 2). “Each brand in the wine industry with an online presence must keep their fans enthusiastic with constant presence and updates to their pages” (Moore, 2011).

What consumers think of Paso Robles Wine Industry

Consumers and critics often refer to Paso Robles as an inventive wine region, one that marches to the beat of its own drum. “Paso vintners can tinker with blends and styles that would be unfeasible in other regions more bound by tradition and consumer expectations,” (Heimoff, 2013).

The majority of Paso Robles wineries are family owned, and often have a relaxed environment that gives off a homey feeling, which the region prides itself on doing. “Paso Robles is the wine country for people who like great dining and welcoming inns, but also like open roads and no crowds, who want to talk with the winemaker in the tasting room, who still—and we know who we are—have to practice a couple of times before asking for “Viognier.” A wine region for the rest of us,” (Canziani, 2010).

The growth of the wine region has increased rapidly, and will continue to grow based on its faithful following. “Paso Robles has become one of California's most exciting wine regions. Ten years ago, there were perhaps 35 wineries here. Today there are more than 200. And the wines they make are garnering increasing acclaim” (Fish and Schneider, 2010).

Strong Varietals in the Paso Robles Wine Region

Rhone varietals are predominantly grown in Paso Robles. Rhone red grapes consist primarily of Mourvèdre, Syrah, Grenache, but also include Cinsault, Carigan, and Petite Sirah. The most popular white Rhone varietals include Viognier, Roussanne, Marsanne and Grenache Blanc. “There are more than 40 wine grape varieties grown in Paso Robles Wine Country from Cabernet Sauvignon to Zinfandel

to Syrah. The region's diverse soils and many microclimates make the Paso Robles
AVA suitable to grow a wide variety of wine grapes” (Paso Robles Wine Alliance).

AVAs of Paso Robles Wine Country

Adelaida District	Paso Robles Willow Creek District
Creston District	San Juan Creek
El Pomar District	San Miguel District
Paso Robles Estrella District	Santa Margarita Ranch
Paso Robles Geneseo District	Templeton Gap District
Paso Robles Highlands District	

CHAPTER 3

Methodology

The most effective way to collect data for this study was attending the retreat and observing the different seminars, tastings, presentations and wineries themselves. The event permitted me to talk to both the professionals and participants, gaining more insight on both sides of the industry, making and buying wine. I observed the way the winery owners and wine makers interacted with the buyers, and had the chance to listen in on the questions the participants asked the industry professionals.

Notable Participants

Three notable people that work for the alliance that planned, hosted, and facilitated the event are Chris Toranto, Communications Director, Krista Smith, Consumer Engagement Manager and Jennifer Porter, Executive Director.

Other notable people include winery owners, winemakers, managers, etc. that presented in the seminars and vineyard visits.

David Hance, Clayhouse Vineyard	Niels Udsen, Castoro Cellars
Steve Lohr, J.Lohr Vineyards & Wines	Chris Cameron, Broken Earth Winery
Doug Kruse, Jack Creek Cellars	Brian Brown, ONX Wines
Robert Haas, Tablas Creek Vineyard	Steve Martell, Sextant Wines
Paul Sowerby, Adelaida Cellars	Sherman Thacher, Thacher Winery &
Skylar Stuck, Halter Ranch Vineyards	Vineyard
JC Diefenderfer, Hope Family Wines	Chrissy Wittmann, Wild Horse Winery
Toby James, Tobin James Cellars	& Vineyards

Jason Joyce, Calcareous Vineyard	Gary Eberle, Eberle Winery
Anthony Yount, Denner Vineyards	Vic Roberts, Victor Hugo Winery
Carl Bowker, Caliza Winery	Eric Ogorsolka, Zenaida Cellars
Scott Shirley, JUSTIN Vineyards & Winery	Janell Dusi, J. Dusi Wines
McPrice Meyers, Barrel 27	Kevin Willenborg, Vina Robles
Dave Caparone, Caparone Winery	Ken Volk, Kenneth Volk Vineyards
	Richard Hartenberger, Midnight Cellars

Participants

Matthew Kaner: Bar Covell, Los Angeles, CA

Camille Taylor: Circa Grill, Thomson's Station, TN

Peter Kasperski: Cowboy Ciao, Kazimierz, Scottsdale, AZ

Maeve Pesquera: Flemmings Prime Steakhouse & Wine Bar, Newport Beach

Dave and Julie Dillon: Idyll Awhile Wine Shoppe Bistro, Idyllwild, CA

Michael Frank: Irvine Ranch Market

Lindsay and Luis Rosales: Nirvana Grille, Laguna Beach

Stacey and Jeff Lloyd: San Clemente Wine Shop, San Clemente, CA

Jameson Brooks: San Diego Wine Co., San Diego, CA

Elizabeth Benny: The Half Moon Bay Wine & Cheese Company, Half Moon Bay, CA

Deanna Brazil: The Raphael Hotel: Kansas City, MO

Jennifer Sollinger: The St. Regis, Atlanta, GA

Reid Kinnett: The Wine Country, Signal Hill, CA

Scott Lewis, V Wine Cellar, Napa Valley

Roger Fawcett, Whole Foods Markets, Southern, CA

Paul Wentzel, Wine Thief/Ale Jail, St Paul, MN

Chris Gluck: Wine Vault & Bistro, San Diego

Jen Piallat: Zazie Restaurant, San Francisco, CA

Interview Design

1. Why come here over other wine regions?
2. Why would you sell Paso Robles wine in your restaurant/wine bar?
3. What about the region do you like?
4. What makes it something you want to bring back to your business?

Data Collection

The data collection started with the Paso Robles Wine Country Alliance in preparation for the event. Communications Director, Chris Toranto, briefed me on the history of the alliance and information about the event being held.

During the event, collection involved interacting with the participants during their down time in order to ask them my prepared questions. This was fairly simple because the participants were friendly and welcoming.

Data Presentation

The data presentation consisted of people answering my questions on the spot, which I recorded. While I helped pour wine for a few different wineries, I was able to

mingle with the participants and received a lot of interesting insight as to why they were visiting the region and what their intentions were in terms of purchasing the wine.

Limitations

There were time conflicts due to the seminars, presentations, and scheduled activities for the participants. I did not have enough time to talk to the participants because there was a strict schedule for them in order to fully experience everything in this wine region.

Delimitations

Based on my own time constraints, I wasn't able to attend the entire retreat. Thus, I was not able to talk to everyone participating in the event, but out of the 18 people, I spoke with 10 people.

CHAPTER 4

Data Analysis

This chapter offers understanding of the data collected for this study. It includes interviews with participants of the buyer's retreat event as well as research from the literature review. Data collected for this study has been collected through live interviews. The responses from the participants are direct quotes from them. The participants interviewed are wine buyer's that are mostly based out of California, but a handful are based out of a few different states on the east coast.

Description of Participants

Camille Taylor traveled all the way from Thompson's Station, Tennessee for the buyer's retreat in Paso Robles. Taylor works at Circa Grill in Thompson's Station as the Bar Manager, and came to Paso Robles looking to widen her stock of Paso Robles wine in the restaurant she works.

Maeve Pesquera remains one of the opening partners and now serves as the national Director of Wine at Fleming's Prime Steakhouse & Wine Bar in Newport Beach, California. She traveled to Paso Robles for the buyer's retreat in order to broaden her knowledge on wine and also maybe broaden her supply of wine in the restaurant. As the Director of Wine, Pesquera oversees Fleming's wine program of over 100 wines, which are often recognized with *Wine Spectator* and *Wine Enthusiast* magazines.

Dave and Julie Dillon are the owners of Idyll Awhile Wine Shoppe Bistro in Idyllwild, California. They bought the store two years ago with the intent to deliver the people of Idyllwild with a high quality wine store and restaurant

Paul Wentzel traveled from St. Paul, Minnesota to explore the wonderful Paso Robles wines. Paul and his wife, Trina, are the owners and founders of The Wine Thief and Ale Jail in St. Paul, Minnesota. The shop strives to offer “quality vino for under \$20.”

Buyer’s Retreat Participant Questionnaire

Question	Respondent Answer
Why come here over other wine regions?	“Paso is an up and coming wine region that I want to be a part of. I love how tight knit the wineries are, you don’t see that everywhere”
Why would you sell Paso Robles wine in your restaurant or wine bar?	“I love the red blends this region offers. It is something different, and being different sets you apart from the competition, which is what my restaurant is going for”
What about the region do you like?	“The planning of the AVAs, the growing and winemaking, it was all done very acutely and correctly with great forethought”
What makes it something you want to bring back to your business?	“I’ve always thought of Paso wines as high alcohol, high fruit, just sort of big jammy fruit, a crowd pleaser definitely”

Research Questions from the Literature

The following research questions were created for this study to discover the importance of special events to motivate and educate buyers and potential buyers.

1. Why is Paso Robles wine of interest to the wine industry?

- “Paso Robles is California’s third-largest and fastest-growing wine region and engaged in a \$2.5 million, five-year branding campaign, with a mission to educate the world about the region and what makes it distinct in the global wine market” (Paso Robles Wine Country, 2006).

2. What motivated people to visit the wine region?

- “Everyone I met in Paso was warm and welcoming. And the wine community is truly a community, with producers helping each other out. This is small town America meets wine country” (Lemke, 2011).

3. What makes it something you want to bring back to consumers?

- “Paso Robles remains a work in progress, but I believe the region already shows some of the most striking potential in all of California” (Parker, 2007).

4. What varietals are strongest for this region?

- “Paso Robles is red wine country. Though Zinfandel put Paso Robles on the premium-wine map decades ago, Cabernet Sauvignon and Merlot have dominated in recent years” (Peters, 2007).

Comparison of Literature and Qualitative Data

For this study, it was important to understand what current wine buyers and industry professionals already knew about the wine region and its impact.

Research Question 1. Why is Paso Robles wine of interest to the wine industry?

This question was asked as an introduction to the study in order to display that Paso Robles wine is a notable wine region. The literature presents that it is an up and coming wine region that has enormous potential to influence the state in terms of wine

regions. Participants of the retreat agree with the literature. One respondent noted, “I see it as innovative and forward thinking,” Camille Taylor said.

Research Question 2. What motivated people to visit the wine region?

This question was asked in order to learn why people visit the Paso Robles wine region. The literature gave us a few different reasons, including travel and tourism publications as well as social media outlets. One participant matched with the literature by stating, “Everything I read about Paso makes me want to visit and bring all of my friends,” Elizabeth Benny from Half Moon Bay, California said.

Research Question 3. What makes it something you want to bring back to consumers?

This question was asked in order to find out specifically what people like about the wine and why they choose to buy and sell this wine. The literature tells us that Paso provides a feel-good experience for visitors as well as quality wine that is constantly being experimented. Winery owner David Hance from Clayhouse Vineyards agrees, “This is still really young wine country. There is a still lot of experimentation, new things being tried. We’re still looking for the best places to grow the best things, and that’s why its fun to be here because there are people who are trying to make amazing wine and looking for the right place to do it,” said Hance.

Research Question 4. What varietals are strongest for this region?

This question was asked in order to find out more about the growing conditions and characteristics of the region. The literature all leads to mostly red wines as being the best to grow in this region. Winery owner Steve Lohr from J. Lohr Vineyards & Wines adds a slight contradiction stating that Paso has not found its primary grape. “Here, Bordeaux and Rhône’s are both awesome. And it’s such a huge area, with all the different

soils and climates, we have not made our stake on any one type of grape or wine, so I think people think of us as experimenting,” Lohr said.

CHAPTER 5

Conclusion

Summary

This study was done to discover how a special event can educate and motivate wine buyers. Marketing and branding play an incredibly large role for both consumers and wineries, especially compared to years ago. Special events can create two-way symmetrical communication between a wine industry and wine buyers. In addition, special events are a channel that provides an outlet for wineries and wine regions as a whole to showcase their brand and product to consumers.

This study seeks to learn from both the buyers that attended the retreat and the industry professionals. The following research questions were used to learn more about this region:

1. Why is Paso Robles wine of interest to the wine industry?
2. What motivated people to visit the wine region?
3. What makes it something you want to bring back to consumers?
4. What varietals are strongest for this region?

Discussion

The data collected from the respondents and the literature coincide to prove that special events have a significant impact on the Paso Robles wine region.

1. Why is Paso Robles wine of interest to the wine industry?

Paso Robles is a huge wine destination for wine connoisseurs at this point, and both the literature and participants agree that the things this region is working on will not go unnoticed for much longer.

2. What motivated people to visit the wine region?

People are now visiting wine regions based on their online presence, which is new for not just Paso Robles but all wine regions, which is why the online presence is vital for the kind of business this region is looking for, both industry professionals and the literature states.

3. What makes it something you want to bring back to consumers?

Participants all agree that this wine region produces unique and innovative wine. This is due to the progression of this region over the past 20 years, meaning that the newer wineries are taking more risks with their wine. This is appealing to consumers because it's something they've never seen before.

4. What varietals are strongest for this region?

Together, the wine experts, wine buyers, and literature all point to red wines as being the best grapes to grow in this region. The mixture of warm climate and coastal temperatures creates a superb environment for growing both Rhone and Bordeaux varietals.

Recommendations for Practice

Based on research in the study, wineries in the Paso Robles region should actively participate in a coalition, including more special events like the buyer's retreat, to promote their wines to restaurants and to large-scale wine buyers. In addition to hosting more special events, the Paso Robles wine region would benefit to find a niche within wine countries in the state. This wine region has so many unique features, educated professionals, and overall exceptional wine to offer consumers. The Paso Robles Wine Country Alliance is doing a remarkable job marketing the region, and the individual wineries are unifying the region by being friendly and welcoming to visitors of the region.

Special events like the buyer's retreat I attended have the potential to be extremely beneficial to this region. With my observations, it seemed as though the participants were enthralled with experiencing this unique region for the first time. Many more people could have the opportunity to experience this as well if the alliance or specific wineries hold similar events.

Study Conclusion

This study discovers that special events leave incredibly impactful results on the Paso Robles wine region. By inviting potential buyers to Paso Robles, filling them with knowledge about the region, winemaking, and tasting the wine themselves, it has a direct positive correlation on the region itself. After the retreat, the buyers end up putting Paso Robles wine in their restaurant or wine shop and many more consumers will easily find out about this region.

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Figure 1: Paso Robles Wine Country Alliance website



Figure 2: Paso Robles Wine Country Alliance Facebook

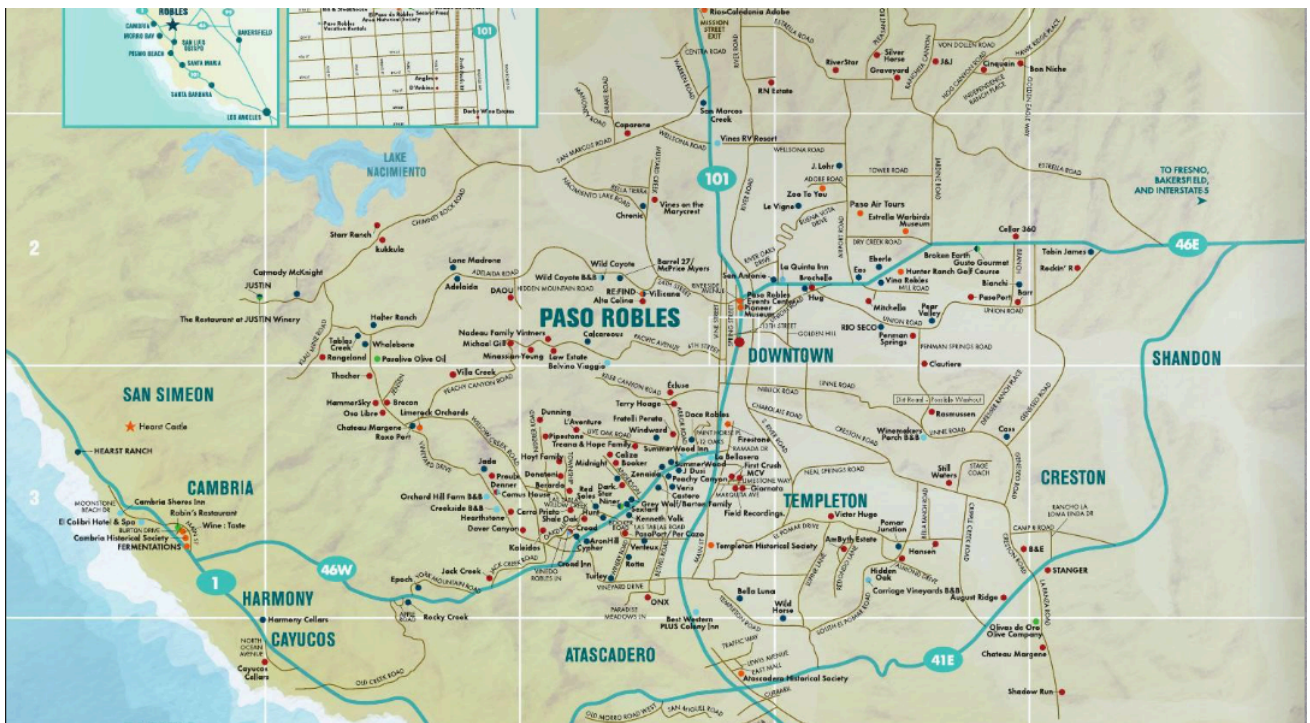


Figure 3: Paso Robles Wine Region Map

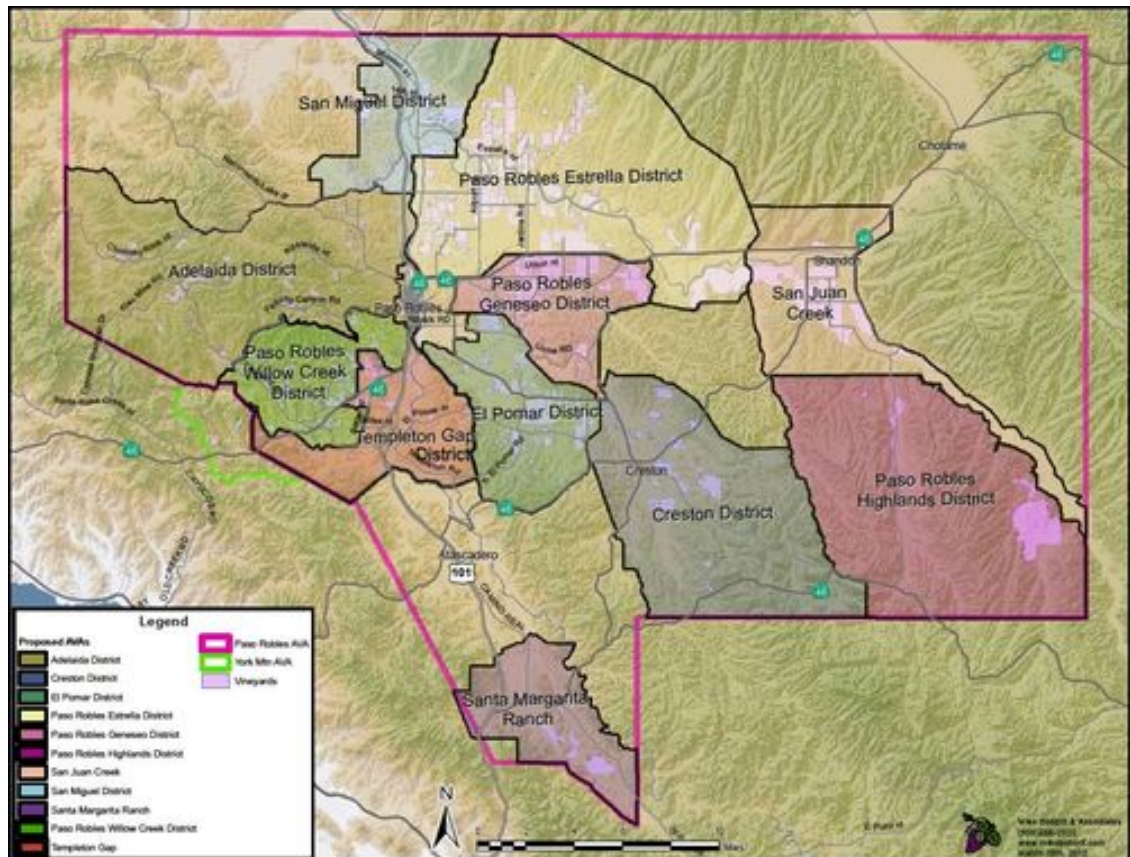


Figure 4: Paso Robles AVA map



*Figure 5: Wine tasting setups for participants
Castoro Cellars*



*Figure 6: Seminar tasting
Castoro Cellars*



Figure 7: J.Lohr panelists: J.Lohr Winery



Figure 8: First page in Paso Robles informational brochure



Figure 9: Preparing for tasting at Victor Hugo Winery



Figure 10: Dave Caparone from Caparone Winery educating the participants