



# How social media practices shape family business performance: The wine industry case study

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## ABSTRACT

The purpose of this paper is to investigate how family businesses utilise social media tools, to determine what the purposes, benefits and challenges are, and to discover competencies that are important in social networking and cooperation. A multiple case study method was employed based on semi-structured interviews with six wineries located in the Balaton region, Hungary. The interviewees and the wineries they represented were selected among the 55 wineries applying the non-probability sampling purposive technique and the interviews were analysed using a case study method and qualitative content analysis. The results show that Facebook is the most popular social media tool that wineries use to increase brand awareness and reach new potential customers. This study also presents a “Social media roadmap” framework for good practice and proposes practical steps family businesses may take to help them succeed in their marketing activities.

## 1. Introduction

Over the last several decades, family business research has gained greater recognition in the literature (Reay & Whetten, 2011; De Massis & Kotlar, 2014; Santos, Ramos, Sousa, & Valeri, 2021; Santos, Sousa, Ramos, & Valeri, 2021). It is recognised that family businesses constitute the pillar of most economies throughout the world and make significant contributions in terms of employment and economic output (Collins & O'Regan, 2011; Liñán et al., 2019; Paul, 2020). In the wine sector, the organisational form of a family business is common. Such firms are often family businesses with long-term, outstanding traditions. The wine they produce embodies values, symbols, and traditions, which together convey the family's mindset. In most cases, these families have a good market reputation (Georgiou & Vrontis, 2012). From the perspective of employment and revenues, the wine industry is a highly representative economic field in many countries (Galati et al., 2019).

In recent years, an increasing number of enterprises have adopted the use of social media, a phenomenon that has the potential to change organisational practices and relationships. It provides powerful channels

for collaboration (Chemli et al., 2020; Memili et al., 2018; Toanoglou et al., 2021; Valeri, 2021a, 2021b; Valeri & Baggio, 2020a, 2020b, 2021), may enhance online co-operation with customers, suppliers and partners (Brink, 2017), may improve the innovative capability of the organisation (Standing & Kiniti, 2011) and has the potential to increase an organisation's ability to find new ideas as well as to develop services and products. Wine tourism as part of the tourism industry is information-intensive; therefore, it is critical to understand changes in technologies, such as the adoption of social media (Valeri & Baggio, 2020c). Social media tools enable businesses to reach both current and potential customers effectively and budget wisely (Kallmuenzer et al., 2018). The majority of wine producers are part of expert network systems which are used to enjoy social network benefits (Lewis et al., 2015). Edosomwan et al. (2011) also emphasise the role of social media as a marketing and networking tool and in addition, stress the potential uses of social media in management, since it can promote open communication and knowledge sharing between organisation's management and employees. Recently, there have been several surveys of social media use in the wine industry (Cheng & Edwards, 2015; Dean &

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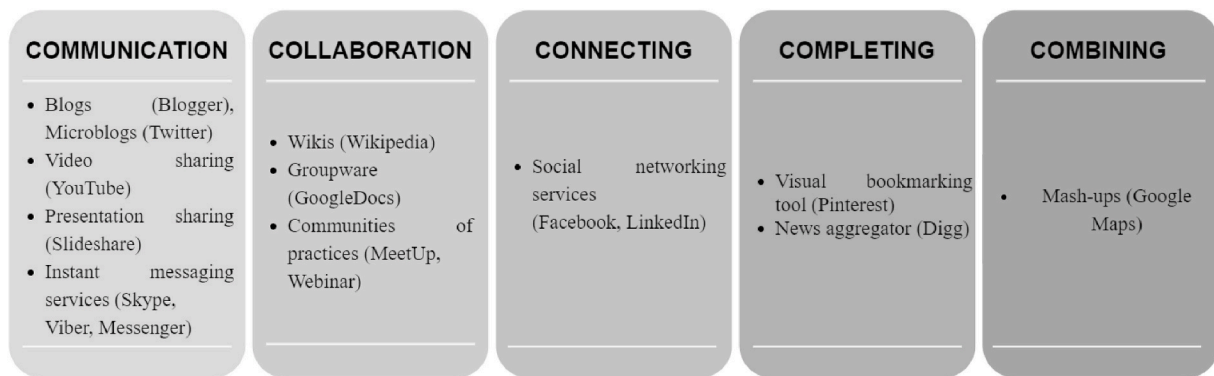


Fig. 1. Categories of social media tools.

Source: Authors' elaboration, based on Vuori, 2011

Forbes, 2016; Strickland, 2013; Thach, 2016; Valeri & Baggio, 2020a); however, very few (Balogh, 2019; Szolnoki et al., 2018) have so far examined the topic in Hungary.

The above summary shows the potential of social media usage and also highlights that there is a need for in-depth studies that focus on the peculiarities among family wineries. In 2018, Veszprém and the Balaton region won the title of the European Capital of Culture for the year 2023. Due to this reason, the Balaton wine region will be in focus in the next years. To gain a competitive advantage, family businesses have to focus on positioning their uniqueness. That means developing their social media, and this means that networking skills will be vital. The objective of the paper is therefore to investigate the usage of social media tools. This paper makes two potential major contributions: first, it reveals the types and the purposes of applied social media tools in the Balaton region; second, it provides an insight into competencies that are important in social networking and cooperation, observations which can serve as a useful benchmark for other wine regions in Hungary or abroad.

The paper is organised as follows: initially, the literature review discusses theoretical models and previous research related to social media, family business, and the wine industry. The existing research on family winery businesses is summarised in Section two. Section three outlines our research questions, which were formulated based on the literature. Section four describes the research methods, focusing on sampling, data collection and analysis. The fifth Section presents the findings of our study. A final discussion covers the limitations and opportunities for future research features is given in section six. Lastly, section seven concludes the article with managerial implications and our proposed new framework.

## 2. Literature review

### 2.1. Social media

The most significant technological development in the last 30 years has been the Internet, which makes it possible for individuals to collaborate and share knowledge instantly. Technological developments have introduced significant changes in how organisations interact with their partners and customers (Siamagka et al., 2015). Social media equips organisations with collaborative tools that transform the means of cooperation (Evert et al., 2016; Galati et al., 2019; Jalonen, 2014). It can be described as “communication systems that allow their social actors to communicate through multiple dyadic ties” (Peters et al., 2013, p. 282). These tools enable organisations to reach their customers at a relatively low cost and with a high level of efficiency (Breton-Miller & Miller, 2016; Kallmuenzer et al., 2018). Businesses are increasingly adopting social media as a communication channel, a phenomenon that is transforming the way companies operate and relate to their customers and providers (Pekkala & van Zoonen, 2021). Recent literature

highlights the importance of social media by suggesting that customers take into account social media content when forming relationships and making buying decisions (Pekkala & van Zoonen, 2021) as well as the important role it plays in shaping consumer culture; for example, the texts can act as cultural resources upon which consumers draw when they attempt to make sense of the world and its consumption practices (Lundahl, 2020). Yannopoulou et al. (2019) examined the role played by social media in facilitating networking, the novel forms taken by exchange networks, and the drivers as well as the effects of individuals' engagement.

The current research is based on Vuori's (2011) categories of social media tools (Jalonen, 2014) (Fig. 1.). Communicating is about sharing, storing, and publishing content, discussing opinions and influencing others (Pekkala & van Zoonen, 2021). Collaboration tools enable group content creation and editing without location and time constraints (Galati et al., 2018). The connecting category contains those technologies which connect people with the same interests and thus enable the creation of communities around these interests. The completing category means to complete content by describing, adding, or selecting information, tagging content, and showing connections between content. Combining tools enables combining, mixing, and matching content.

In the EU, 75% of organisations employing more than 250 people were using social media as a part of their operations in 2019, in order to support image building and product marketing, as well as to build and maintain customer relationships (Pekkala & van Zoonen, 2021). In 2020, according to the Hootsuite (2020a) survey, there are 4.54 billion internet users and 3.8 active social media users around the world. There are 7.64 million internet users and 6.00 million social media users in Hungary (the total population is 9.67 million), which means that more than half of the population uses social media (Hootsuite, 2020b). In Hungary, the most popular social media platforms and sites, which are based on the number of people that marketers can reach using adverts are Facebook (5.6 million), Messenger (5.35 million), and Instagram (2.1 million) (Hootsuite, 2020b).

Social media is often associated with marketing. This is because initially social applications were focused on advertising and related to marketing issues, but later social media became a complementary extension of all of the marketing efforts (Evans & McKee, 2012; Miralles-Marcelo et al., 2014). Based on the Hootsuite (2020a) survey, the main purposes of using social media tools according to the respondents were sharing general updates (58.5%), communicating directly with customers (57.8%), and sharing marketing messages (53.4%). It is vital to have a network system among small businesses in a concentrated area to create a regional image, attract more customers, and generate higher profit (Albattat et al., 2020; Arcese, Valeri, Poponi, & Elmo, 2020; Elmo et al., 2020; Valeri, 2021b).

Over the last few years, the popularity of social media influencers has grown, making influencer marketing well-known. Influencer marketing

positions people to be ambassadors of a brand while targeting their engaged following. They are paid a fee by a brand for their endorsement, which is shared with their followers via social media. It is the digitised future of word-of-mouth marketing (Vrontis et al., 2021).

Concerning the skills needs of family businesses, Moniz and Kovács (1997) name 10 competencies that are required by European enterprises in the future: learning to learn; information processing and management; deduction and analytical skills; decision-making skills; communication skills, language skills; teamwork, team-based learning and teaching; creative thinking and problem-solving skills; management and leadership, strategic thinking; self-management and self-development and flexibility. Furthermore, Tan et al. (2017) suggest that critical thinking and problem-solving are expected skills in the labour market.

## 2.2. Family business

Small and medium-sized enterprises (SMEs) are essential for local economic development, playing a central role in economic growth (Gherghina et al., 2020; Astrachan, 2010). In the European Union (EU) an SME is any business with fewer than 250 employees (Paul, 2020); families own the majority of SMEs, which are the backbone of the economy (Botero et al., 2015). They represent 99% of all businesses in the EU and provide about 85% of new jobs, as well as ensure two-thirds of the total private sector (European Commission, 2019). The EU strategy supports programs such as the Small Business Act, Start-up and Scale-up Initiative, the Competitiveness for Small and Medium Enterprises (COSME) Programme (European Commission, 2020) to increase the number of SMEs engaging in sustainable business practices as well as the number of SMEs employing digital technologies (European Commission, 2020). Family businesses and SMEs generally exhibit a flexible approach towards technical shifts, better adaptability to customer requirements, and their organisational structure allows quick decision-making (Gherghina et al., 2020). Their uniqueness can be attributed to the different impacts of the family on the part of the ownership, strategic management, governance, and leading and controlling the daily activities (Astrachan, 2010). However, they face numerous problems, including poor marketing strategies and low brand value. As markets become more competitive, family businesses are now attempting to invest in marketing to compete and succeed in this dynamic, competitive environment (Paul, 2020). Innovation plays an essential role in new marketing and management methods, as well as in genuine technologies (Gherghina et al., 2020).

In our study, the definition by Litz (1995) was adopted, which views the family business as a firm controlled by one or more family members involved in the management or at least holding capital stakes. When the top managers of one business come from the same family it is expected that they share the same traditions, social values, a common vision, and practical priorities.

## 2.3. Wine industry

Wine has always remained an integral part of our culture, connected to services and tourism. Recently, attention has been paid to wine production which has increased worldwide. A vast literature focuses on the wine industry, as this field is one of the most representative economic activities in most of the countries (Karagiannis & Metaxas, 2020; Galati et al., 2014; Rossi et al., 2012). In the wine sector, innovation is found mainly in the processes of production or marketing (Dries et al., 2014). Large tourist regions (like Italy, Spain, or France) have international recognition; however, in less developed tourist regions (like Greece or Portugal) SMEs or family wine businesses have developed new marketing tools to meet their customers' needs and compete in the globalising world of wine. Small family wineries have employed a variety of innovative approaches to remain economically sustainable in the very competitive tourism market (Baggio & Valeri, 2020; Karagiannis & Metaxas, 2020; Valeri & Katsoni, 2021). Successful wine tourism cases,

regions, and wineries regularly use “collaborative marketing techniques” (wine trails, wine festivals) in order to grow (Berghoef & Dodds, 2016). Most wine producers join horizontal networks for immediate tangible benefits, creating depth and interest in the tourism product of a wine region, sharing industry-specific knowledge and best practices, technology sharing and an overall increase of product visibility (Lewis et al., 2015).

In the distinction between New and Old World wine-producing countries, Hungary belongs to the latter category, a cluster that claims the greater market share (Giacomarra et al., 2020). The industry has a long and traditional history in Hungary. The proportion of young farmers under the age of 40 is 13%, a figure which also reflects the fact that the average age of Hungarian farmers is around 54–55 years, below the European Union average. This means that a generation change lies ahead in Hungary in the coming years (Szepesi, 2019). In Hungary, there are six wine regions (Upper Pannon, Pannon, Upper Hungary, Balaton, Danube, Tokaj). This study focuses on the Balaton region.

## 2.4. Existing research on family wineries businesses

For wineries, social media represents nearly 2.5 billion potential wine consumers who are available online, and for this, wineries also need to adapt to digital communication technologies. This means that they should not only be present on social media interfaces but also be active and conscious (Szolnoki et al., 2018), as these interfaces are also used by consumers for information, to exchange opinions, and to stay up to date (Pucci et al., 2019). Customers are represented in different proportions on each social media interface. There are platforms where mainly young people (Generation “Z”) can be reached, but on Facebook, the Baby boomer, the X, Y, and Z generations are almost equally present (Viens, 2019). Knowledge of the generational distribution of social media users can be vital to the operation of a business, as the effectiveness of communication in social media depends on it (Fuentes et al., 2017). For this, the opinions of leaders and people like the given customer are of paramount importance. A negative comment can deter the buyer (Zhao et al., 2018). In their research, Szolnoki et al. (2014) concluded that 75% of social media users are influenced by what they see on social media in their wine purchases, and it also affects how much they recommend the given product to their friends. Communication is often treated one-sidedly by producers, sharing information but not paying attention to feedback from their consumers (Forbes et al., 2015). Another problem is that wineries see Facebook as a path to social media interfaces, which companies mostly try to use without social media marketing. Szolnoki et al. (2018) in their study argued that among all wineries, Facebook is by far the most used social media platform.

The “Great Wine Test” survey revealed that communication between the wineries and the customer takes place in person and via email. Other social media platforms (Instagram, Pinterest) are used negligibly by wineries to communicate. Hungarian wineries mainly have a Facebook profile, but few have their blogs. The survey also determined the purpose for which Hungarian wineries use social media tools: promoting their wineries, reaching new potential customers, and communicating with existing customers. To a lesser extent, the goals included informing customers about events, wine tasting, and maintaining a good relationship with customers. Surprisingly, monitoring and communicating with competitors was the least important (Balogh, 2019). Although appearing on multiple social media platforms simultaneously has a positive effect on winery sales, the importance of monitoring and communicating with customers should not be underestimated in this case (Thach et al., 2016). The effectiveness of social media tools is also influenced by several other factors, such as the person managing the pages, the amount and frequency of time spent on it, marketing strategy, and the social media adaptation level (Szolnoki et al., 2018; Thach et al., 2016).

The wine sector has been chosen in this study, as social media is accepted and used by wineries mainly as a communication tool in

overseas countries, where these tools were developed, rather than European countries. Wine, as an experience, has some peculiarities that differentiate it from other products, such as the fact that the quality is unknown to most customers before purchase and consumption, who prefer to acquire suggestions from experts and friends before making their choice. Thus, social media tools have gained increasing importance in the wine industry (Szolnoki et al., 2014).

### 3. Research questions

The literature review shows an increasing interest in the practice of, and academic research into, social media. However, very few researchers (e.g., Balogh, 2019) examine the topic in Hungary or from the perspective of family businesses. Hungarian studies using a case study method are rare. Therefore, we begin our investigation of social media usage by exploring Research Question 1 (RQ1):

Which social media tools are used by Hungarian wineries in the Balaton wine region? (based on interview protocol Q7 question) in order to find the most popular social media tools applied by family wineries and compare them with the result of Balogh (2019).

While several studies have highlighted the increasing popularity of social media usage (Dean & Forbes, 2016; Strickland, 2013; Szolnoki et al., 2018), this research extends our understanding of social media usage as it involves in-depth case studies that focus on the peculiarities of social media use in family wine businesses. Hence, we also investigate the objectives of the usage, as indicated in Research Question 2 (RQ2): Q2. What are the main purposes family wineries use social media tools for? (based on interview protocol Q16 question) We can also compare our results with the findings of the “Great Wine Test” (Balogh, 2019).

To the best of our knowledge, no prior research has investigated the competencies required for social networking. Previous studies (Moniz & Kovács, 1997; Tan et al., 2017) examined competencies that are required by European enterprises, and only Lewis et al. (2015) studied wineries and Edosomwan et al. (2011) found social media to be vital in networking. Hence, this study investigates competencies within Research Question 3 (RQ3):

What are the main competencies needed for social networking and cooperation among family wineries? (based on interview protocol Q27 question).

### 4. Research method

Given the fact that the objectives of this study are more related to improving understanding than measuring, the family wineries were analysed with a qualitative research approach through an exploratory case-study method. The case study was considered the most appropriate method due to its capacity to offer detailed insight into a phenomenon in its real-life context (Miles & Huberman, 1994). According to Yin (2014), case study research is a particular strategy for describing a contemporary phenomenon within its real-life context occurring in the present, where an in-depth description is useful. Case studies are relevant to management studies and suitable methodology to gain an understanding of organisational dynamics, social processes, and studying especially family businesses (De Massis & Kotlar, 2014). We conducted an exploratory case study to diagnose the antecedents and limitations to social media utilisation in the Hungarian family wineries. Exploratory research is not intended to provide conclusive evidence but helps us to have a better understanding of the problem (Saunders et al., 2015). Moreover, in the current study, we adapted content analysis, which focuses on patterns that show different interpretations of multiplied connotations (Titscher et al., 2000). Interviews were recorded and transcribed and then coded using a computer-based software called ATLAS.ti (version 7). The software was used to code and categorise the transcribed texts for noteworthy themes. The themes were analysed for relevance to the research questions. In the coding phase, the data was broken down into manageable segments and given names or other labels

**Table 1**

Description of case studies.

	Founded	Active winery generation	Respondent	Date of interview
“A”	2009	1st	Managing director	19 November 2018
“B”	2011	1st	Co-owner	26 February 2019
“C”	1998	1st	Managing director	22 January 2019
“D”	1992	2nd	Owner, winemaker	19 November 2018
“E”	1990	2nd	Sales and marketing	5 February 2019
“F”	2001	2nd	Managing director	5 February 2019

(Schwandt, 2007).

#### 4.1. Sampling and interview participants

According to Bryman and Bell (2015), there is no unequivocal number as a sample size. Samples in qualitative research tend to be small in order to support the depth of analysis that is fundamental to this mode of inquiry. Saunders et al. (2015) opined that when the more appropriate data are collected from a participant, the fewer people are needed. It is worth emphasizing that despite the small sample size of only six participants, they had the right knowledge, skills, and information at their disposal, and so provided an in-depth contribution. The samples are based on particularly interesting cases, which can offer new insights regarding the research questions (Eisenhardt & Graebner, 2007). The interviewees were selected from among the 55 wineries in the Balaton region, Hungary, and a non-probability sampling purposive technique was applied. Six wineries were chosen; of them, three interviewees who represented the first winery generation (which means that the interviewee founded the family business) and three participants representing the second winery generation of the winery family (which means that the children of the founder lead the business) (Table 1).

#### 4.2. Interview questions

The ability of the participants allows the researchers to gather information using a protocol with open-ended questions (Walliman, 2015). The interview protocol was divided into four sections. Sections I and II comprised gathering data about the interviewee and the winery (personal background; organisational background). Section III was used to examine how the participants implemented social media tools into the business. Finally, Section IV was used to investigate the participants' views on social networking. An interview protocol formed the frame for the interviews. The interviews consisted of a combination of open, semi-open, and closed questions, and their topics were communicated to respondents in advance (Table 2).

#### 4.3. Data collection

We conducted qualitative research involving semi-structured interviews in the Balaton region of Hungary. To gain a comprehensive picture, we adopted a multiple case study and used multiple data and data gathering techniques. The use of multiple sources of data (data triangulation) has been advocated as a way of increasing the internal validity of a study (Stake, 1995). After the participants were identified and chosen, an email was sent out to each owner of family wineries introducing the research and requesting an interview. All interviewees are members of the families (owners or working as a manager). Once the interview request was accepted, a date and time were agreed upon. The interviews were carried out at the end of 2018 and the beginning of 2019, in person at the interviewee's winery. All interviews lasted

Table 2

Interview protocol - Most related questions from Section III. and IV.

Section		Explanation	Types
<b>III. SOCIAL MEDIA TOOLS</b>			
7. What kind of social media tools do you use?	<b>Communication</b>	Share, store and publish contents, discuss and express opinions and influence)	Blogs (e.g. Blogger) and Microblogs (e.g. Twitter) Video Sharing (e.g. YouTube, video sites) Presentation Sharing (e.g. SlideShare) Instant Messaging Service (e.g. Skype, Viber, Messenger)
	<b>Collaboration</b>	Collective content creation and edition without location and time constraints	Wikis (e.g. Wikipedia) Groupware/Shared Workspaces (e.g. GoogleDocs) Communities of Practices (e.g. MeetUp)
	<b>Connecting</b>	New ways of networking with other people, socialising oneself into the community	Social Networking Services (e.g. Facebook, LinkedIn)
	<b>Completing</b>	Complete content by describing, adding, filtering information, and show a connection	Visual Bookmarking Tool (e.g. Pinterest) News Aggregator (e.g. Digg)
	<b>Combining</b>	Mixing and matching contents	Mash-Ups (e.g. Google Maps)
8. What other forms of networking/marketing tool does your business use?		Multiple answers are possible	Email Press releases Events Webinars Portal (e.g. Winoport) Application (e.g. Kóstolom)
15. What are the reasons of social media usage?		Multiple answers are possible	It is a very useful networking tool. It helps to improve effectiveness in our work. Competitive pressure. The majority of our customers are comfortable utilising social media tools.
16. What is the purpose of using social media tools?		Multiple answers are possible	To increase brand awareness. To increase traffic to the website. To reach new potential customers. To improve relationships with customer. To develop business partnership. To reduce expenses.To improve sales.

Table 2 (continued)

Section	Explanation	Types
19. What are the challenges does your business face when using social media tools?	Multiple answers are possible	Responding customer in real-time. Social media's privacy and security. It is difficult to integrate social media with our main line of operations. It is difficult to maintain communication with the customers. We did not face any challenges.
20. What are benefits of social media for your business?	Multiple answers are possible	Increased brand awareness. Increased traffic to the website. New customers were attracted. Improved relationships with customer. Grew business partnership. Reduced expenses. Improved sales.
<b>IV. SOCIAL NETWORKING</b>		
23. What is your purpose of being a member of a network?	Multiple answers are possible	Exchange of ideas, cultures and practices. Sharing information and knowledge. Conference and business events participation. Membership in a community. Competitive advantage.
27. In your experience, what competencies are needed for collaboration?	Please select the top 5 and rank them.	Team player Sharing responsibilities Respect other opinions Strategic thinking Active listening Handling difficult behavior Willingness to share knowledge with members of the organization Motivation Creativity Analytical thinking Analysis of consequences Recognize opportunities Adaptation Optimism Ability to manage connections Empathy Proactivity



between 50 and 60 min and were all recorded and later transcribed verbatim to facilitate detailed and systematic analysis. Issues of confidentiality and anonymity were confirmed. A confirmation letter explaining what the study involved, reaffirming the interviewee's voluntary participation, and describing the use of the data was signed by the participants. All personal information was removed, and the wineries were renamed with letters (A, B, C, D, E, F) to protect the wineries' identities. As part of our secondary research, empirical data consisting of the wineries' websites and other platforms were collected after the interviews. Websites and platforms provided additional information; they also provided insights into the wineries' social media utilisation practices and clarified points made in the interviews.

#### 4.4. Data analysis

After recording and transcribing the interviews we analysed the transcripts line by line, read carefully through each transcript, made notes, and highlighted important statements. Based on the interviews, we generated case study descriptions and shared them with the interviewees to let them provide additional comments. We created a case study profile for each of the wineries, highlighting the main factors such as the social media landscape; their reasoning and purposes; challenges and benefits; social networking; and required competencies important for networking and cooperation (see findings in heading 5 below). In addition, extensive coding was also implemented using a computer-based content analysis software program called ATLAS.ti (version 7). This software is designed to help researchers to organise text, graphics, audio, and visual data files, as well as all subsequent coding. In the coding phase, the data were divided into segments and identifiable labels were given. In essence, coding “requires constantly comparing and contrasting various successive segments of the data and subsequently categorising them” (Schwandt, 2007, p. 32). This process was repeated as many times as necessary to get an exact sense of our database in its entirety.

### 5. Findings

This research sought to examine the use of social media technologies in order to understand why family business wineries have incorporated them into their marketing activities. This understanding helped us to design a new framework for family businesses, which we have termed “Social media roadmap” (see 7. Conclusion). We did not intend to generalise the survey findings rather hoped to obtain some detailed information. This section presents the findings from the case study profiles based on the descriptions. In some cases, descriptive quotes from the interview transcripts have been used to focus on the views of participants; in other cases, the content analysis results of the interviews are displayed (ATLAS.ti). The first part of the numbers in the table shows the frequency of mentions, while the second number is the correlation coefficient. The value of the correlation coefficient is always between 0 and 1. Number 0 indicates that if there is no connection between the two codes, they are independent of each other. And 1 means perfect interaction, in which case the two codes are always mentioned at the same time.

#### 5.1. Social media landscape

The findings from this theme revealed that Facebook is the most popular social media tool applied by the family wineries. According to the answers of Q7. (What kind of social media tools do you use?), all (6)

examined family businesses use “social networking services” (Facebook) for connecting:

“We have an active Facebook page and make posts by every second or third day.”

Four participants integrated “groupware” for collaboration; three of them used “video sharing” for communication and “mash-ups” applications as a combination of different tools. Only two of them agreed on using “instant messaging services”, and only one claimed the usage of “blogs”, “wikis” and “visual bookmarking tools”. None of them mentioned “presentation sharing”, “communities of practices”, and “news aggregator”.

Regarding the most comfortable tool (Q9. What social media tools are you most comfortable with?), all respondents agreed on Facebook, the next popular tools were Instagram (3 out of 6), and one of them mentioned Messenger. This result accords with Hootsuite's (2020b) statistics which revealed that in Hungary the most popular social media platforms are Facebook, Instagram (2.1 million), and Messenger.

“I am responsible for updating Facebook and Instagram, which means that it takes me 1–2 hours a day!”

From other marketing tools (Q8. What other forms of networking/marketing tool does your business use?) wineries all mentioned “events”, and 5 of them used “email”, “press releases” and “application”. Four of the participants took advantage of being on “wine portal” and in one case, a winemaker gave an example for another type, a gastro TV show (Table 3):

“Having a good website is a life-and-death issue, so we make a new one every two years, which is included in the marketing budget. Presence in gastronomic TV programmes can also bring a lot to the table for example, after Borbás's show, a 30% increase in traffic was observed immediately.”

#### 5.2. Reasons for and purposes of social media usage

Most of the interviewees indicated that they have been using social media for more than seven years (one of them, “F” family business, 18 years ago) (Q13. When did you start to integrate social media in your business activities?).

The participants highlighted (Q15. What are the reasons for using social media?) that the most common reasons for using social media were: “the majority of their customers feel comfortable using these tools” (5 out of 6), “competitive pressure” (4 out of 6) and these are “useful networking tools” (3 out of 6). Only one family winery mentioned that social media can “help to improve effectiveness at work”.

“We start using social media because of the market competition and the fact that these are used by our customers and guests.”

The main purpose of the usage (Q16. What is the purpose of using social media tools?) for all studied family businesses (5 out of 6) was to “increase brand awareness” and “reach new potential customers”. Four interviewees mentioned that they could help “improve our relationships with them” and “increase traffic to our website”. According to half of the interviewees, using social media could “reduce expenses”. Only two respondents agreed that social media can “improve sales”, and only one expressed that these tools can “develop business partnership”. Table 4 shows the results of the content analysis.

**Table 3**  
Marketing tools used by wineries.

	Application	E-mail	Event	Gastro tv program	Press release	Wine portal
Marketing tools	4–0.17	3–0.14	4–0.18	1–0.05	4–0.18	4–0.17

**Table 4**  
Purpose of using social media tools.

Purposes	Mentions	Interviewees said
Increase brand awareness	6–0.06	“one of the ultimate goals is to increase brand awareness”
Increase traffic to the website	5–0.05	“social media directs people to our website”
Improve relationships with customer	4–0.04	“quicker and more informal than emails”
Reach new potential customers	4–0.04	“it is another way to reach customers”
Reduce expenses	3–0.03	“with social media you can reduce expenses” “cheap advertisement opportunity”
Improve sales	2–0.02	“... since we apply social media (mainly Facebook) there is about a 50% increase in consumption and sales ...”
Develop business partnership	2–0.02	“easy to see and connect to new other business even abroad ...”

Only 2 of the family wineries have already integrated social media strategy into their marketing strategy (Q17. Have you defined social media strategy?). Four businesses have not created any social media strategy yet but utilise different social media tools.

Most of the participated family wineries evaluate the effectiveness of social media somehow (Q18. What is your primary metric for evaluating your social media effectiveness?). Five of the respondents' measure “the number of subscribers and followers” and half of them measure the “number of comments, shares” and “website traffic”.

“... since we apply social media (mainly Facebook), there is about a 50% increase in consumption and sales. We also measure its effectiveness by the number of followers, comments, and shares as shown by Google Analytics”

### 5.3. Challenges and benefits of social media usage

Overall, half of the family businesses did not face any challenges while using social media (Q19. What are the challenges does your business face when using social media tools?). For others, the answers showed that the most challenging were to “respond to customers in real-time”.

“Though social media has several advantages we experience some challenges and negative side effects. Even though in most of the cases there are good comments, one bad and unfair comment can start an avalanche of discussion which may influence the attitudes of the people. The main problem is that even though we try, we are not able to serve everyone's request immediately as our main purpose is the maintenance of serving quality wine.”

Concerning social media benefits, all strongly agreed that social media tools “increased brand awareness” (Q20. What are the benefits of social media for your business?). According to 5 of them “new customers were attracted” and they “improved the relationships with them”. Four of them mentioned as an advantage that these tools “improved sales” and 3 of them “increased traffic to their website”.

Table 5 shows that wineries experienced some benefits in terms of the use of social media tools, while they barely faced any challenges. Regarding the value of the correlation coefficient (0.79), it can be said that social media tools were mentioned in the most positive sense. Regarding the challenges, social media tools were mentioned 4 times, and of these four mentions, 3 challenges were associated with negative experiences.

### 5.4. Social networking

While answering the Q22 “Does your business belong to any formal business network? Which one?”, three out of the six wineries are

**Table 5**  
Benefits and challenges of using social media tools.

	Challenge	Benefit	Interviewee said
Social media	1–0.01	–	“we need to develop this skill”
Social media -	3–0.27	–	“difficult to be real-time and answer immediately” “hard to deal with negative comments that and fake profile”
Social media +	–	19–0.79	“the winery grew with social media” “perfect tool for brand building”

members of Csopaki Codex and Balatoni Kör. The Csopaki Codex is a terroir community in the Upper-Balatón region called Csopak. The Csopak Codex is an independent system of origin and trademark protection focusing on Csopak and its traditional wine type, the Riesling. Its purpose is to provide a higher level of protection for the quality of Csopak wine. The Csopaki Codex contains a set of production standards in four pillars. Wines with a trademark must comply with the strictest quality and origin protection rules in the country. Wineries also mentioned “Hegyközség”, the “National Chamber of Agriculture (HCA)”, “Pannon Wine Alliance”, “Junibor Association”, “Women of the Vine & Spirits” and “Nivegy Valley”. The most successful initiation which has grown to project cooperation for marketing purposes is “BalatonBor” (BalatonWine: the first regional wine-growing brand in Hungary). BalatonWine is a joint product of the Balatoni Kör and the Riesling Generation, but anyone who can meet the required criteria can produce it. Four out of the six wineries have their own BalatonBor.

Family businesses agreed (Q23. What is your purpose of being a member of a network?) that they can “share information and knowledge” (5 out of 6), “exchange of ideas, cultures, and practices”, be a “member of a community” (4 out of 6), and half of the respondents mentioned that they could gain competitive advantage. One of the owners actually set up the Balatoni Kör and said.

“The aim is to establish a circle with local resources and underpinned by local services that will make the region attractive and habitable in every season. We want to create demanded things in a demanding environment, on Lake Balaton, which, I believe, represents the foundation of our entire existence.”

Table 6 shows the reasons why wineries are members of a business network or an organisation. It displays the main reasons and ranks them by frequency: the reason most frequently mentioned was knowledge sharing (5), followed by competitive advantage and being a member of a community (3–3). Although the wording was different all the wineries indicated that within an association it is easier to create and market an all-year-round open wine and gastro community.

### 5.5. Competencies important for networking and cooperation

Four out of six wineries indicated that the most important competencies for networking and cooperation are knowledge sharing among members of the organisation and network members, strategic thinking, and a team-player attitude (Q27. In your experience, what competencies are needed for collaboration?). Half of the interviewed wineries stated that motivation is vital to collaboration. Analytical thinking, creativity, respecting other people's opinion, recognising opportunities and possibilities were named by two out of the six wineries. It is interesting to note that recognising opportunities and possibilities were mentioned by first-generation wineries while team player attitude was named by all the 3 s-generation wineries.

The frequency of co-occurrence of the competencies was needed for successful cooperation. The top competencies (Fig. 2.) that wineries named in order are knowledge sharing; strategic thinking; being a team player; analytical thinking; managing relationships and motivation.

**Table 6**

Reasons for being a member of a network or organisation.

	Competitive advantage	Exchange of ideas, cultures and practices	Sharing information and knowledge	Membership in a community
Social network	3–0.07	3–0.07	5–0.11	3–0.07

**Fig. 2.** Word cloud about top competencies (Word Art).

## 6. Discussion

Overall, our findings demonstrate, roughly in line with Szolnoki et al. (2018) that Facebook is the most popular social media tool used by the examined family wineries. It has been also found that for the most comfortable tool, five respondents of six agreed on Facebook and the next popular tools were Instagram and Messenger. These results are consistent with the findings of Balogh (2019) in the “Great Wine Test” in Hungary as well as with the statistics of Hootsuite (2020b), which determined that in 2020 in Hungary the most popular social media platforms and sites (based on the number of people that marketers can reach using adverts) are Facebook, Messenger, and Instagram. Wineries use Facebook to increase their online presence and Instagram application to create customer awareness and enhance relationships.

Where the main purposes underpinning the adoption of social media tools in marketing activities by family wineries are concerned, respondents revealed that the greatest purpose was tied to the increase of brand awareness, to maintain the winery’s relationship with its customers, and to reach new potential customers. The first result is a new aim, a unique one that did not appear in Balogh’s (2019) study, but the second and third purposes are similar. He demonstrated that the objectives behind the implementation of social tools among Hungarian wineries include reaching new potential customers and communicating and maintaining a good relationship with existing customers. Other

studies have shown that the usage of social media improved the financial performance of the business via growth in sales volume and the number of customers (Chung et al., 2014, pp. 14–17; Thach et al., 2016). Similarly, we observed that social media was seen to improve sales and reduce expenses. Other previous studies (e.g., Galati et al., 2019) indicated in parallel that small wineries utilise social media tools to reach more customers. These findings are also consistent with the Hootsuite (2020a) empirical survey; social media can be a powerful tool to maintain one’s relationship with one’s customers (communicate directly with them).

Finally, our findings show that among those surveyed wineries, the five most important competencies in social network and cooperation are analytical thinking, teamwork, creativity, managing relationships, and strategic thinking. Our study results show similarities to what Moniz and Kovács (1997) and Tan et al. (2017) named as future competencies for European enterprises, including strategic thinking, being a team player, analytical thinking, managing relationships, and motivation were the top five items. However, the most important competence wineries indicated for cooperation was knowledge sharing, a finding similar to the verdict of Lewis et al. (2015). Knowledge sharing builds a community’s integrity and strengthens its culture. When a community is seen as upholding trustworthy values, there is likely to be a greater degree of motivation to participate and share knowledge. Knowledge sharing and brand awareness are found to be the main values in the



research outcome as reflected in [Giacomarra et al.'s \(2020\)](#) conceptual framework regarding Old World countries' wineries.

### 6.1. Theoretical and practical implications

This study has both theoretical and practical implications. From a theoretical perspective, it contributes to enriching the empirical evidence on the usage of social media tools and their impact on business performance. Moreover, our empirical results show the influence of social media in the wine industry, identifying the main factors, purposes, reasons, and challenges associated with its use.

Our findings have a useful practical implication for wineries using social media tools as part of their marketing activities. Winemaking is influenced mainly by the terroir or natural environment. Those small family wineries which have similar resources (types of grapes) but different methods of winemaking still face limitations regarding quantity. Hungary is a small country with six winemaking regions. In the last couple of years, customers have become more conscious and more knowledgeable about quality wines. As a result, the demand for quality wine is increasing. Wineries in the Balaton region can satisfy these needs most of the time, depending on the weather. Thus, instead of being rivals, they have learned to cooperate. Our study revealed that the most important competencies to cooperation and networking are knowledge sharing among the members of the organisation and network members, strategic thinking, and having a team-player attitude. Based on the research, the following approaches appear to be advantageous:

- Joining a regional and regular winery forum (e.g., the one organised by Balatoni Kör), an official association or network in order to be informed and share knowledge.
- Working with local or regional entrepreneurs and initiating mutual events and projects.
- Targeting customers using social media tools can improve the effectiveness of social media activities.
- A team player attitude and motivation are soft skill elements that can be developed by either internal training, team building, or an external trainer, coach.

Social media tools play an important role in wineries' lives. These technologies bring knowledge and information sharing, communication, and marketing to a new level and benefit both businesses and customers. It gives a great opportunity for high exposure at a low cost; it offers a possibility to set interactive communication with customers and to get more information on their needs. Nevertheless, amid this ever-changing online environment and growing convergence, the family wineries face the challenge of having to follow the trends. Social media use is not always as easy as it seems; it requires new ways of thinking, engagement, and interaction. There are some issues to be addressed when wineries intend to measure social media performance, respond immediately to customers, and incorporate transparency into their business operations. Measuring social media performance is time-consuming, but it is crucial to take the time to collect the required data and then assess all the patterns found within the social media experience.

According to our findings, Facebook is the most popular social media platform. Today's online landscape is a connection point. Wineries must create connections and keep them alive. They have a chance to create long-term relationships by engaging customers. Here they target specific audiences, deliver exclusive offers, and give important constant messages for their existing and potential customers. Wine is a social beverage, and social engagement is becoming more digital. Social media can be a powerful tool for wineries, and it can support marketing communication. The appropriate social media tools must be selected for a particular type of communication. Some family wineries have chosen a single social media tool to focus on, while others select no more than three tools. If the wineries choose multiple platforms, it would be the best way that they place the same message on each one. Wineries

maintain traditional forms of marketing channels as well, including e-mail, press releases, leaflets, etc. Social media is not the only way to make sales; wineries can maintain the connection with their customers and can share information and virtual experiences for potential customers. Wineries have the opportunity to create mobile-compatible web pages and connect to special wine applications to encourage customers to connect and follow them on their smartphones, wherever they are. Wineries must consider delegating social media operations to an expert or outsourcing this activity. They can manage social media platforms in-house or outsource the work to a digital marketing agency if they lack time or expertise.

### 6.2. Limitation and future research

The current study has some limitations related both to the limited sample size and the region in which the research was developed. The size of the sample is small (this paper is based on six wineries), which means that universal implications cannot be stated, but at the same time, it enables preliminary suggestions for family wineries to be obtained. Despite this limitation, this paper is in good company as researchers have published papers based on a small number of case studies in high-quality journals such as the *Journal of World Business* ([Bonaglia et al., 2007](#)) or *European Management Journal* ([Paul, 2020](#)). Moreover, [Runfola et al. \(2017\)](#) analysed 352 qualitative case studies published between 2002 and 2011 in top business and management journals and reported that 25% of the papers are in line with the ideal number of cases, namely between four and ten; however, a very large number of articles used less than four cases. The case study is an appropriate method of an exploratory study, yet it is challenging to analyse data in a generalisable way. The wineries which were involved in our research all come from the Balaton region, which is one of the six wine regions in Hungary. The value of Hungarian wine lies in its diversity as it is rich in grape varieties, terroirs, and winemaking practices; thus it would be a good next step to consider a large sample, including all wine regions with quantitative research with an online questionnaire.

Another limitation is that our framework (see 7. Conclusion) does not have an explanatory background, but rather serves as a description of good practice. Nevertheless, it is easy to use the "Social media roadmap" framework to examine the factors contributing to the success of integrating social media tools into family businesses' marketing activities.

Taking these limitations into account, to be able to generalise one's results, different methodologies can be applied, such as qualitative content or cluster analyses, or quantitative comparative analyses. It can also be interesting to use the social network analysis (SNA) methodology to verify if the relationships among wineries affect the organisational asset of the Hungarian winery system.

## 7. Conclusion

The present study aimed to identify the main factors, purposes, reasons, and challenges that wineries are faced with when implementing social media in their marketing activities. Social media is the place for wineries and SMEs to engage people wherever they are. It offers a unique opportunity to establish trust, as it can be a place where businesses encourage people to talk about them. But implementing social media into the business can be a big challenge. Social media marketing offers new tools, but without any framework, these platforms do not create measurable goals and deliver the best results. Thus, based on the case studies as well as international and national research, we developed an innovative approach, "Social media roadmap" ([Fig. 3.](#)) that contributes to the development of marketing communications for SMEs. Social media roadmap is a framework, which supports businesses on how to use social media in order to achieve their goals, to get the most out of social media activity, but in the meantime, it needs to be flexible to accommodate the rapidly changing social media landscape.



Fig. 3. Social media roadmap.

As summarised below, eight essential areas and activities could be addressed by SMEs and family businesses to build up their social media marketing.

1. **Strategy:** clarifying and formulating the goals that align to business objectives, taking into account the following questions
  - a) Who will be responsible for conducting social media activity?
  - b) What are the policies and regulations (like GDPR) to be followed?
  - c) What percentage of marketing costs can be spent?
  - d) What would be better, compiling an independent social media strategy or integrating the goals into the marketing strategy?
2. **Social media:** compiling a portfolio of social media tools (based on the target group, type of product or services, HR needs, etc.).
3. **Content:** creating creative, engaging content tailored to the target audience choosing texts, images or video, determining the frequency of distribution, the regularity, and authorisation system.
4. **Post:** placing posts on social media devices in the form of text, image, or video display (Blogger, Facebook, Instagram, YouTube, etc.) and defining short, easy-to-read text and eye-catching images to arouse interest.
5. **Feedback:** creating a real-time customer response after receiving a request/question, as quickly as possible, and using Facebook Messenger chatbot, which is a software running on messaging platforms that can simulate and imitate human conversation.
6. **Connect:** placing regular customer inquiries, advertisements and using influencer marketing.
7. **Diversity:** using at least three different social media tools at the same time to increase the effectiveness of marketing activities.
8. **Measure:** measuring the effectiveness of social media tools through several factors.

Several businesses are confused about choosing the right tools for growing their business. Some of them think that search engine optimisation (SEO) can provide the best results, others vote for social media or consider that email marketing is the right choice. In order to ensure a comprehensive result, businesses may choose all of these options. As SMEs and family businesses serve as the backbone in the EU, their success is essential. If they cast their vote alongside social media, considering social media tools and choosing the right platforms are important. Our Social media roadmap would be a useful framework for firms in European countries as there are hundreds of SMEs in these countries. However what exactly the Social media roadmap looks like and contains depends on the industry, the aims, and the size of the business.

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