

Co-Creating Hospitality Experiences at the Cellar Door:  
A Case Study of Waiheke Island

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## ABSTRACT

Whereas wine tourism literature is increasing, there remains little evidence of literature that recognises the synergies between winery visitors and operators in the co-creation of experiences at the cellar door. Thus the intention of this research is to understand, identify and describe how effectively wineries within a specific region co-create various dimensions of the cellar door experience in their interaction and promotion to visitors to the cellar door. As a consequence, this study contributes to the academic literature pertaining to cellar door experiences.

The tasting room is often referred to as the ‘cellar door’ and is the area which provides the interface between visitors and staff. In this arena, visitors taste wine, view buildings, facilities, and meet staff from those specific vineyards. This interface during the cellar door experience is an area in which a winery can differentiate itself from the competition.

This research illustrates that the visit to a winery’s tasting room incorporates a number of themes that contribute to the overall wine tourism experience. These themes include the winery size and surroundings, the product itself, and ultimately the level and types of service received. The concept of ‘co-creation’ is placed within the definition of ‘hospitality’ in this research, which investigates how experience and behaviour may provide new perspectives for winery operators to consider. The particular relevance of this research comes from comparing consumers’ experiences of the tasting room to the intentions of winery operators, therein providing specific recommendations for the implementation of practical outcomes for a successful tasting room.

A qualitative case study approach was adopted for this project in which the sample chosen is representative of the winery operators on Waiheke Island, New Zealand. A multiple case embedded design was constructed and interviews in six of the wineries were conducted with the winery operators. A further 16 visitor participants at these wineries were also interviewed.

The findings of this research indicate that hospitality experiences are not necessarily co-created solely through human interaction. Other intangible factors such as the initial encounter of embarking upon a winery visit, the engagement between visitors and

winery operators, and the overall experience of the visit, interweave to construct this phenomenon.

Intending to add new knowledge to the area of wine tourism, this research project offers some information to winery operators, and the wine tourism industry on how winery tasting rooms may be managed more effectively to create positive experiences for their visitors. This information suggests that influences other than ‘face to face’ communications may enrich the hospitality experience received at the wineries.

# TABLE OF CONTENTS

<b>ABSTRACT .....</b>	<b>II</b>
<b>LIST OF FIGURES .....</b>	<b>VII</b>
<b>LIST OF TABLES .....</b>	<b>VII</b>
<b>MAPS .....</b>	<b>VIII</b>
<b>ATTESTATION OF AUTHORSHIP .....</b>	<b>X</b>
<b>ACKNOWLEDGEMENTS.....</b>	<b>XI</b>
<b>ETHICS APPROVAL .....</b>	<b>XII</b>
<b>CHAPTER 1 INTRODUCTION .....</b>	<b>1</b>
1.1 Introduction .....	2
1.2 Study Background .....	3
1.3 Wine Tourism.....	5
1.4 New Zealand Wine Tourism Industry .....	6
1.4.1 Wine Tourism on Waiheke Island.....	6
1.5 Wine Tourists – Who are They?.....	7
1.6 Purpose and Research Questions.....	7
1.7 Methodology .....	8
1.8 Structure of Thesis.....	10
1.9 Conclusion.....	11
<b>CHAPTER 2 LITERATURE REVIEW .....</b>	<b>12</b>
2.1 Introduction .....	13
2.2 Hospitality Evolution .....	13
2.1 The Functional Concept of Hospitality .....	14
2.2 Hospitality Perspectives .....	14
2.2.1 Architecture.....	15
2.2.2 Anthropology .....	15
2.2.3 Philosophy.....	16
2.2.4 Sociology.....	16
2.3 Hospitality as Entertainment .....	17
2.4 Hospitality and Service Experiences .....	18
2.5 Experience Paradigms and Constructs .....	19
2.5.1 Theatre and Performance .....	19
2.5.2 Servicescapes .....	20
2.5.3 Experience.....	21
2.6 Behaviour and Experience.....	22
2.7 Co-Creating Experiences.....	24
2.8 In the Beginning. . . Wine Tourism.....	25
2.9 Wine Tourism in New Zealand .....	26

2.10	The Wine Tourist.....	27
2.11	The Winery Operator.....	28
2.12	Co-Creation of Cellar Door Experiences .....	29
2.13	Conclusion.....	30
<b>CHAPTER 3 METHODOLOGY .....</b>		<b>31</b>
3.1	Introduction .....	32
3.2	Overview of the Study.....	32
3.2.1	Research Aim and Objectives .....	33
3.3	Research Theory and Theoretical Paradigms .....	33
3.3.1	The Inquiry Paradigm.....	34
3.3.2	The Researcher’s Assumptions .....	34
3.4	Adopting a Qualitative Approach.....	35
3.5	Grounded Theory Methodology .....	37
3.5.1	Constructivist Grounded Theory .....	37
3.6	Case Study Approach .....	40
3.6.1	Case Sample .....	42
3.6.2	Sampling Process .....	42
3.6.3	Semi-structured Interviews .....	44
3.6.4	Field Observations.....	45
3.6.5	Pre-test.....	46
3.7	Data Analysis .....	46
3.7.1	Initial Coding.....	47
3.7.2	Focused Coding.....	48
3.7.3	Theoretical Coding.....	49
3.8	Ethical Considerations.....	51
3.8.1	Participant Information Sheet .....	51
3.8.2	Data Storage .....	51
3.9	Research Reflexivity .....	51
3.10	Limitations of the Study .....	53
3.11	Conclusion.....	54
<b>CHAPTER 4 ANALYSIS OF FINDINGS (WINERY OPERATORS) .....</b>		<b>55</b>
4.1	Introduction .....	56
4.2	Respondent Profiles and Opinions .....	56
4.2.1	Winery Operators’ Profiles .....	56
4.3	Unique Settings .....	57
4.4	Emotional Engagement .....	61
4.5	Generosity and Reciprocity .....	64
4.6	Brand Loyalty/Awareness .....	65
4.7	The Product .....	68
4.8	Conclusion.....	69
<b>CHAPTER 5 ANALYSIS OF FINDINGS (WINERY VISITORS) .....</b>		<b>70</b>
5.1	Introduction .....	71

5.2	Respondent Profiles and Opinions .....	71
5.2.1	Winery Visitor Profiles .....	71
5.3	Unique Settings .....	71
5.4	Emotional Engagement .....	75
5.5	Generosity and Reciprocity .....	77
5.6	Brand Awareness/Loyalty .....	79
5.7	Product.....	81
5.8	Conclusion.....	83
<b>CHAPTER 6 DISCUSSION OF FINDINGS.....</b>		<b>84</b>
6.1	Approach .....	85
6.2	Relevance of Participant Contribution .....	85
6.3	Environment .....	86
6.4	Engagement .....	89
6.4.1	Emotional Engagement .....	89
6.4.2	Brand Identity/Awareness .....	90
6.5	Experience .....	92
6.5.1	Generosity and Reciprocity .....	92
6.5.2	Brand Identity and Awareness .....	94
6.5.3	Product .....	94
6.6	Emergent Theoretical Model (The Three ‘E’s).....	96
6.7	Conclusion.....	98
<b>CHAPTER 7 CONCLUSIONS.....</b>		<b>99</b>
7.1	Introduction .....	100
7.2	Implications of the Research .....	100
7.2.1	The Serendipity of the Whole Encounter .....	101
7.2.2	Mechanics for Engagement of Visitors .....	101
7.2.3	The Experience of Creating Memories .....	102
7.3	Recommendations for Future Research .....	102
7.4	Final thoughts .....	103
<b>REFERENCES.....</b>		<b>104</b>
<b>APPENDICES.....</b>		<b>118</b>
	Appendix A: Interview Guides.....	119
	Appendix B: Initial Letter to Wineries.....	121
	Appendix C: Participant Information Sheets.....	122
	Appendix D: Confidentiality Agreements.....	128
	Appendix E: Consent Forms .....	130

## LIST OF FIGURES

<b>Figure 1.</b> Conceptual framework for co-creating hospitality experiences at wineries.....	8
<b>Figure 2.</b> Co-creating hospitality experiences at the cellar door: A conceptual framework. ....	23
<b>Figure 3.</b> Multiple case embedded design and units of analysis at Waiheke wineries ..	43
<b>Figure 4.</b> Semi-structured interviews – A methodological framework.....	45
<b>Figure 5.</b> Data analysis and coding themes .....	50
<b>Figure 6.</b> Co-creating hospitality experiences at the cellar door: The Three ‘E’s .....	96

## LIST OF TABLES

<b>Table 1.</b> Advantages and disadvantages of a case study approach.....	41
<b>Table 2.</b> Winery operators’ demographic information .....	43
<b>Table 3.</b> Winery visitors’ demographic profile .....	44

# MAPS



Reproduced with kind permission Nicks Wine Merchants

# Waiheke Island

★ VINEYARD LOCATIONS



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## **ATTESTATION OF AUTHORSHIP**

I hereby declare that this submission is my own work and that, to the best of my knowledge and belief, it contains no material previously published or written by another person (except where explicitly defined in the acknowledgements), nor material which to a substantial extent has been submitted for the award of any other degree or diploma of a university or other institute of higher learning.

Signed.....

**JOHN EDWIN KELLY**

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- I dedicate this thesis to my two boys, Joshua and Benjamin – *‘The direction in which education starts a man, will determine his future life’* (Plato).

## **ETHICS APPROVAL**

This thesis reports on research involving participation of humans (i.e. winery operators, and visitors to wineries), Approval to use human subjects for research was granted by the AUT Ethics Committee (AUTEK). The approval was given for a period of three years commencing 13<sup>th</sup> November 2012.

The Ethics application reference number was 12/288.

Chapter 1

# Introduction



Matiatia Bay – Waiheke Island

# Introduction

## 1.1 Introduction

It is now acknowledged that visits to vineyards have become an additional motivation for many travellers (Macionis & Cambourne, 1998). This form of special interest travel, based on a visitor's aspirations to visit vineyards and wine producing regions, or in which visitors feel the temptation to visit wineries whilst travelling for other reasons, has now become recognised as wine tourism (Getz, 2000). These visits will often include a 'cellar door experience' which is created through a series of multifaceted interactions between visitors, service staff, the wine product, environment, and other winery attributes (Carlsen & Boksberger, 2015).

Visitor interactions with frontline winery staff have the potential to generate co-created value (Prahalad & Ramaswamy, 2004a). They imply that the more compelling the experienced environment becomes, customer communities can take on a life of their own and thereby become directly involved in the co-creation of individual experiences. This concept of co-creation has particular relevance when placed in a tourism context in that it possibly provides a distinctive and unforgettable customer experience (Grissemann & Stokburger-Sauer, 2012). Creating a distinctive experience involves both customer interaction and a connection which links the customer to the experience (Pine & Gilmore, 1998; Shaw, Bailey, & Williams, 2011). This interaction during the cellar door experience is an arena in which a winery can differentiate itself from the competition by understanding that cellar door interactions are integral to delighting the customer, providing memorable, hospitable experiences, and consequently helping their visitors to develop a special attachment to that particular winery (Nowak & Newton, 2006).

Research concerning the experiences and behaviour of wine tourists at the cellar door is less apparent, even though they have been acknowledged as thriving ways in which winemakers can establish and strengthen loyalty amongst their customers (Mitchell & Hall, 2004). Qualitative research by Charters, Fountain and Fish (2008) explored a number of themes relating to visitor experiences in tasting rooms throughout Australasia. These thoughts take into consideration not only the aesthetics of the tasting room, but also the service experience encountered.

Discussions around winery operators have generally focused on operational perspectives of the business, considering specifics such as production quality, exporting, technology and marketing (Charters, Clark-Murphy, Davids, Brown, & Walker, 2008). The role of customer service quality is also significant for wineries with direct links to their customers (O'Neill, Palmer, & Charters, 2002). There has been a considerable amount of research to date which has been related to wineries and sales, yet it is now apparent that research about developing relationships with visitors to the wineries will enable winery operators to learn more about their customers' needs and expectations.

Whereas wine tourism literature is increasing, there remains little evidence of literature that recognises the synergies between winery visitors and operators in the co-creation of experiences at the cellar door. The intention of this study is to understand, identify and describe how effectively wineries and visitors within a specific region co-create various dimensions of the cellar door experience in their interaction and promotion to visitors to the cellar door. As a consequence, this study contributes to the academic literature pertaining to cellar door experiences.

## **1.2 Study Background**

Visits to vineyards and particularly cellar doors constituted a considerable part of my summer vacations throughout the 1990s and the early millennium years. Indeed, decisions upon the precise destination of these holidays were often influenced by the location of a nearby wine producing region or particular vineyard. These vineyards were located throughout Europe, including France, Italy, Germany and Spain. In subsequent years, these holiday locations have also extended to the West Coast of the United States of America with the intention of visiting vineyards while there. The motivations for visiting these vineyards were influenced by my perceptions and previous expectations, typical of a winery visitor, which research has identified are predominantly to purchase and consume wine (Alant & Bruwer, 2004). Secondary motivating factors, such as educational, relaxation, and socialisation, also refine the overall experience that winery visitors, including me, hope to find (Carmichael, 2005).

This research study was provoked by a personal experience that I had at two consecutive wineries in the Hawkes Bay region of New Zealand during the summer of 2007. It involves the concept of 'co-creation' placed within the definition of 'hospitality' in an attempt to explain how the overall cellar door experience at both of these wineries may have influenced my behaviour.

My experience at each of the vineyards was very different in that the first of the vineyards gave the impression of a grandiose, ornate and suitably modernistic establishment, in comparison to the subsequent vineyard visited, which was a little more inconspicuously located, with more rustic undertones in terms of accessibility and building structure.

Upon entering the first of these wineries, the feeling of eloquence and grandeur remained, with polished marble floors, elaborate artwork on the walls, and a staff member offering a selection of three wines for tasting. The second winery visit presented to us an oversized cattle shed, set in an unsealed courtyard surrounded by vines, with an area clearly designated for tasting wines.

Further to partaking in a wine tasting at the first vineyard (where there was a nominal charge for the tasting glass), I was provided with a prescribed commentary on each of the three wines presented for tasting. As I attempted to find out more about the processes involved in the making of these wines, it became clear that the staff member's product knowledge was limited, and there was very little emotional attachment to the information that was provided. I subsequently departed the vineyard after having purchased a single bottle of wine in order to retrieve the initial charge made for the tasting glass.

In contrast to this experience, the second winery visit involved meeting a staff member who later revealed that she was the winemaker's wife, and proprietor of this family owned vineyard. Stories were told about the evolution and development of this particular winery, from the early days of securing the land and personally planting the vines, followed by the devastation of vines through disease, up until recent accolades achieved at national and international wine events. During all of this commentary, numerous wines were presented for tasting, thereon her personal interest in each wine was shared with us.

The consequence of this experience, which lasted for approximately one hour, was that I departed the premises having purchased a case of mixed bottled wine, which also included an additional complimentary bottle of sparkling wine.

As a result of these two winery experiences on that particular day, it became evident that the manner in which the hospitality that been offered from each winery had clearly influenced my attitudes and behaviour on that day. With this in mind, this research

study was developed, endeavouring to explore the synergies between winery operators and visitors to wineries concentrated on the island of Waiheke.

The island of Waiheke is a popular visitor destination which lies 17 kilometres east of Auckland, in the Hauraki Gulf (see map on page viii). The island attributes include a maritime climate, and it now boasts more than 22 vineyards, producing some of the finest wines throughout New Zealand (Picard, 2005). Although there has been widely researched literature on New Zealand wine tourism (Mitchell & Hall, 2006), none has specifically concentrated on Waiheke Island. Wineries on the island of Waiheke are unique with respect to their production levels, the way in which their wine is distributed, as well as the range of service provided to visitors at the wineries. This research study intends to provide an explorative investigation of a range of these wineries.

### **1.3 Wine Tourism**

Wine tourism is now widely cited by leading researchers in this discipline as:

Visitation to vineyards, wineries, wine festivals and wine shows for which grape and wine tasting and / or experiencing the attributes of a grape wine region are the primary motivating factors for visitors (Hall, Sharples, Lambourne, & Macionis, 2000, p. 3).

Hall, Sharples, Cambourne and Macionis further emphasise that the above definition clearly distinguishes that the visitation may be motivated either specifically by the product, or generally by the attributes of the wine region. Charters and Ali-Knight (2002) describe wine tourism as an experience that is apparent not only through wine related events and festivals, but also evident through cultural heritage, hospitality, education, wine tasting and sales at cellar doors. Galloway, Mitchell, Getz, Crouch & Ong (2008) make a further distinction between wine tourism and winery visits, identifying winery visits as the primary constituent of the wine tourism experience.

The prevalence of wine tourism research has increased dramatically since the early 1990s, with countries such as the USA, Australia and New Zealand becoming predominant in this field (Quadri-Felitti & Fiore, 2013).

## **1.4 New Zealand Wine Tourism Industry**

Latest research by New Zealand Tourism claims that 13% of international travellers visit a winery or participate in wine tourism activities annually. Over the last five years, this equates to over a million visitors, or more than 220,000 visitors per year (New Zealand Tourism, 2014). It is apparent that the New Zealand wine industry is an important contributor to the New Zealand economy, as international tourists who participate in wine tourism spend \$3,700 during their trip to New Zealand, compared to the \$2,800 average spend of all other visitors (New Zealand Tourism, 2014). The number of wineries in New Zealand rose from fewer than 250 in 1996 to just over 600 in 2008. The wine producing area has more than quadrupled over the same period and now stands at around 30,000 hectares (NZIER, 2009). It has become increasingly important for wine producers to recognise the nature of wine tourists, their motivations, and intentions for visiting their establishments, to ensure that their overall activities capitalise on potential gains in sales and long term customers (Charters & Ali-Knight, 2002).

### **1.4.1 Wine Tourism on Waiheke Island**

Although Waiheke's contribution to the New Zealand wine industry is small, at around one per cent, there is widespread recognition that some excellent wine is produced on the island (Picard, 2005). With now about 23 producers on the island of varying dimensions and aspirations, wine and wine tourism have become an established feature of the island's economy (Baragwanath, 2010). Wineries on the island of Waiheke differ in many ways, from the amount of wine produced annually, their distribution channels, and indeed the range of hospitality experiences provided to visitors at the winery (see map on page ix).

Waiheke Island naturally offers a physical attractiveness which has recently been supplemented with a range of cultural offerings including art, food, and wine. The 35 minute ferry crossing from Auckland also affords passengers spectacular views of volcanoes and other islands scattered around the gulf which has inevitably led Waiheke to become known as "the island of wine" (Baragwanath & Lewis, 2014).

Wine tourism therefore offers winegrowers and associated regions an opportunity for financial development and as wine tourism continues to expand, an improved

understanding of the factors that enhance tourists' experiences should continue to be explored (Roberts & Sparks, 2006).

### **1.5 Wine Tourists – Who are They?**

Hinch and Higham (2001) make clear that an eligible tourist “must leave and then eventually return to their home. Although the travel of an individual does not constitute tourism in and of itself, it is one of the necessary conditions” (p. 47). The New Zealand Ministry of Tourism (2009) has broadly identified wine tourists as those domestic and international visitors, aged 15 years and over, who visit a winery at least once during their stay in New Zealand. A more specific segmentation of wine tourists has been identified by Charters and Ali-Knight (2002), who categorise wine tourists into four specific groups: namely, wine lovers, wine connoisseurs, wine interested and finally, wine novices. This categorisation and identification implies that visitors to vineyards and wineries bring with them variable levels of understanding, knowledge, and enthusiasm pertaining to the wine product. The process of segmenting and profiling winery visitors has not only permitted wine producers to make the process of identifying their consumers easier, but has also assisted in identifying a number of their characteristics (Alonso, Fraser, & Cohen, 2007a).

### **1.6 Purpose and Research Questions**

Whilst wine tourism literature is increasing, there is little evidence of research that recognises the relationship between winery visitors and operators in the co-creation of experiences at the cellar door.

The aim of this study is to establish, how wineries on the island of Waiheke, New Zealand, deal with the heterogeneous expectations of their visitors to co-create hospitality experiences and therefore gain competitive advantage.

Specifically, the purpose of this study is to investigate how winery operators manage the diverse expectations of their visitors to co-create hospitality experiences.

Hemmington's (2007) 'behaviour-experience' framework contributes to a holistic wine tourism approach which is then affected by the interaction of the operator, visitor and surroundings, thereby enabling the co-creation of hospitable experiences at the winery. This concept forms the underlying basis for a conceptual framework (Pearce, 2012) which will position the research being undertaken and communicate how co-creation of the experience is conceived (see figure 1).



**Figure 1.** Conceptual framework for co-creating hospitality experiences at wineries

This research is guided by the following objectives:

- To critically analyse the co-creation of roles and experiences, by visitors and operators, to meet expectations and provide hospitable experiences.
- To evaluate the environmental and social influences required to meet visitor expectations, enhance the hospitality experience, and ensure brand loyalty.
- To provide recommendations for winery operators to consider when staging cellar door experiences, to enhance the visitor experience.

## 1.7 Methodology

Qualitative case study methodology has been employed in this research to explore and understand the participants' experiences and perceptions at the wineries visited. This enabled the collection of data about activities, events, occurrences and behaviours to seek an understanding of actions, problems and processes in their social context (Phillimore & Goodson, 2004). The research seeks to understand the views of winery operators, and perceptions of consumers, using a naturalistic interpretive form of enquiry (Cohen, Manion, & Morrison, 2003).

Case study research provides the opportunity for full, rich, and deep descriptions of the participants' experiences (Cohen et al., 2003). The case study method is preferable when the research focus is based on current issues set within a real life context.

Researching one specific case does not confine the insights to that one case however, and the theorisations can be used to understand the broader context (Yin, 2009). Furthermore, case studies give insight into a subject and may provide theoretical generalisations, in that the case itself assumes a supportive role which effectively facilitates understanding (Stake, 2003).

This choice of methodology originates from the underlying philosophical assumptions held by the researcher since it is these assumptions which guide the research and the approach to theory (Bryman & Bell, 2011). As it seeks to analyse a phenomenon, exploratory research design using a grounded theory method is appropriate (Charmaz, 2006). This analysis will allow research that focuses on the interpretive processes by my analysis of “the actual production of meanings and concepts used by social actors in real settings” (Suddaby, 2006, p. 635).

Six semi-structured interviews with open ended questions were conducted with winery operators and a further 16 interviews with visitors to these wineries were conducted during December 2012 and January 2013. The sample was effectively visitors to the wineries who were willing to be interviewed prior to their departure. Each of the 23 wineries on the island of Waiheke was invited to participate in the research being undertaken. A methodological framework will be presented in Chapter 3 that illustrates how the process informed the research focus.

Semi-structured interviews involve the use of some pre-formulated questions, but there need not be strict adherence to them (Myers, 2010). Interviewers can develop a less structured interview schedule, allowing them to ask non sequential follow-up questions to explore participant responses in more depth, and pursue more specific information in response to the interviewee’s answers (Bryman & Bell, 2011). The semi-structured interview is thus a type of interview that will give some structure, while allowing the interviewee the opportunity to add important insights as they arise during the course of the conversation (Myers, 2010).

A grounded theory approach was taken to analysing the data collected from the interviews of both the winery operators and the wine tourists. The coding process was completed manually and compared and categorised findings, endeavouring to identify emergent themes. Core categories or common themes were identified, representing relationships and connections between categories (Bryman & Bell, 2011). The strength of this approach is that there is an analytical power to theorise how meanings, and

actions are created, thereby enabling an original theory to be constructed (Charmaz, 2006).

The aim of the analysis was to draw insights which may be meaningful beyond this specific case study and contribute to the existing knowledge in the field of wine tourism. To ensure the authenticity and persuasiveness of the analysis and to demonstrate the chain of evidence, compelling quotations are included to illustrate the interpretation of the data (Yin, 2009).

## **1.8 Structure of Thesis**

In order for any research project to be of value, it must hold inherent logic that consequently produces outcomes that make some contribution to further understanding (Ryan, 1995). This inherent logic has been described by McDaniel and Gates (1993) as a methodical manner that commences with the formulation of a research dilemma, supported by a theoretical basis and a review of the literature, then the project design, followed by the data collection and analysis. Interpretation of the data then provides the researcher with findings and ultimate conclusions.

Adopting this logical approach, the thesis consists of the following chapters:

**Chapter 1** introduces the broad topic of wine tourism along with the context of wine tourism in New Zealand. The objectives of the research are made apparent with specific reference to the island of Waiheke, as well as an overview of the methodology employed.

**Chapter 2** reviews the literature related to co-creation of experiences within the context of hospitality, and the guest/host relationship. Secondly, it identifies wine tourist experiences and the motivations pertaining to cellar door visits. The chapter concludes by examining the conceptual framework to be used in this study by re-examining the key concepts stated in the literature review.

**Chapter 3** identifies the methodology adopted in this study. It discusses the methods employed for data collection, and how the fieldwork was conducted.

**Chapter 4** presents an analysis of the findings from the fieldwork from the winery operators' perspective in terms of how they believe co-creation of experiences evolves.

**Chapter 5** provides analysis of the findings from the interviews conducted with visitors to the wineries, and identifies insights that show a relationship with those of the winery operators.

**Chapter 6** illustrates a theoretical model on the co-creation of hospitality experiences at the cellar door, based on a discussion of the findings from the fieldwork which forms the basis of this thesis.

**Chapter 7** concludes with the key findings from this research project, the relationship of the findings relative to academia, implications of the findings as they relate to the wine tourism industry, and finally the theoretical basis on co-creation of hospitality experiences is broadened beyond wine tourism.

## **1.9 Conclusion**

Growth in wine tourism has undoubtedly become a global phenomenon which offers winegrowers and the associated regions an opportunity to develop their identity and brand recognition. As wine tourism continues to extend, an improved understanding of the factors that enhance tourists' experiences should continue to be explored, allowing winery operators the opportunity to consider how experience and behaviour may provide new perspectives for continued success and further development. The intention of this chapter now provides an overview of the perspectives upon which this thesis has been founded. This ultimately constitutes the theoretical framework upon which the findings have been justified, in terms of how hospitality experiences may be co-created at the cellar door.

Chapter 2

## Literature Review



Chardonnay vines on Waiheke Island

# Literature Review

## 2.1 Introduction

This chapter reviews the literature pertaining to the three primary concepts underpinning this research, that is (i) hospitality, (ii) co-creation and (iii) wine tourism, positioned within the context of Waiheke Island in New Zealand. The discussions around these concepts assists in formulating a conceptual model that is presented later in the chapter, upon which this research project is founded.

The chapter commences with a historical account of the origins of hospitality, then identifies some of the perspectives on hospitality from diverse disciplines. The literature reviews the separate ways in which practitioners and academics view hospitality, with particular focus on the content and features of the socially constructed connection between host and guest from which other dimensions materialise. It further highlights that hospitality is a complex phenomenon and endeavours to recognise that “host, guest and hospitality space are co-creators in the process of production, consumption and communication” (Lashley, Lynch, & Morrison, 2007, p. 188).

Reinforcing this concept of co-creation, a conceptual framework is introduced to support Hemmington’s (2007) ‘behaviour–experience’ discussion positioning this research in a winery context, to demonstrate how the interaction of operators, visitors and the surroundings co-create hospitable experiences. This overview will explore the experiences of visitors visiting wineries on Waiheke Island, a small wine producing island positioned 17 kilometres off the east coast of Auckland, New Zealand.

## 2.2 Hospitality Evolution

The origins of hospitality date from time immemorial (Gray & Liguori, 1980; Heal, 1990; White, 1970) when travel was considered treacherous, and thereby having no shelter or food for the night could result in either death by exposure to the elements, or robbery and even murder at the hands of highwaymen. Many communities therefore adopted an ethic of hospitality thereby enabling a degree of safety to be bestowed on travellers, who would otherwise be prevented from travel or trade. Hosts within such societies were obligated to a code of hospitality protecting their visitors or guests from theft or personal harm (King, 1995). The requirement to accommodate guests and

protect strangers who presented themselves at the door has even been regarded as a sacred obligation by social scientists examining the Greek and Roman antecedents of hospitality (O'Gorman, 2007).

## **2.1 The Functional Concept of Hospitality**

More recently, hospitality has been described as a means of providing some form of sustenance and subsequent accommodation to travellers away from their homes. In this sense it has become frequently regarded as an activity with commercial benefit involving consumers and suppliers, market niches, and professions. Further analysis of this definition recognises the work of Lashley and Morrison (2000b) who state that “hospitality is essentially a relationship based on hosts and guests” (p. 15), a theme that has become dominant in academic literature in recent years.

This functional conception of hospitality conveyed by management academics is fundamental to the understanding of managerial concerns when considering the organisation of service, human resources, and commercial operations where food, drink and accommodation are provided through provider–consumer interaction. However, as Lugosi (2009) adds, “the challenge is to examine the social and cultural forces that shape how operational factors are created, maintained and transformed” (p. 396). This research study explores forces such as social encounters between winery operators and winery visitors, within environmental settings, that occur in an attempt to create hospitable experiences.

## **2.2 Hospitality Perspectives**

Endeavouring to define hospitality has provoked interest from academics in recent years to further explore its meaning in wider social, philosophical and anthropological contexts. Scholars and practitioners now view hospitality through differing lenses and with distinct intentions (Lynch, Molz, McIntosh, Lugosi, & Lashley, 2011). It is now important to recognise that hospitality is not only observed from a traditional managerial/operational concept of pure commercial activity, but that perspectives from the wider fields of arts and social sciences should be considered in furthering the discussions on this topic.

### **2.2.1 Architecture**

From an architectural perspective, Wharton (2007) recognises how the design of hospitality space in four prominent New York hotels has evolved from a time where they were initially constructed to dominate neighbourhoods, to supersede the great mansions surrounding them, and not only reflected a highly opulent and palatial effect physically, but also demonstrated the engagement of a large number of highly skilled employees in the daily operation. With a ratio of three staff to each guest, hotels such as the Waldorf Astoria purveyed their claim for a prominent place in society through an extravagant display of high quality service levels (Wharton, 2007).

Through a perceived commodity trading framework, Wharton (2007) illustrates how symbolism and the language of hospitality has adapted over time to recognise the developments in consumer expectations which have effectively commoditised the notion of hospitality through uniformity and standardisation. The levels of service and hospitality once displayed by hotels such as the New York Waldorf, are nowadays seldom found.

### **2.2.2 Anthropology**

In a cultural sense, anthropologists such as Selwyn (2000) have recognised hospitality that consolidates the way in which relationships are formed, converting strangers into familiars, enemies into friends, as well as strengthening already established relationships, through dialects of hospitality and hostility (Di Domenico & Lynch, 2007). An ethnographic study conducted by Cole (2007) investigates the moral obligations observed in two Indonesian villages attempting to define social and cultural expectations about behaviour as host and guest, and how hosts have control and put guests into a position of dependency and debt.

These social and political nuances have also been used to describe the often inhospitable, and hostile, way in which migrants, asylum seekers and refugees are treated, in an example of using hospitality in a metaphorical sense (Ahmed, 2000; Gibson, 2003). Indeed such connotations are somewhat detached from commercial definitions of hospitality and may therefore question the humane elements in a political and societal sense.

Management academics are widely criticised for their functional view on the understanding of hospitality as they seldom account for these social, political, cultural

and even emotional dimensions of such actions (Lashley et al., 2007; Lugosi, 2008). Although the principles of service and mobility of human resources are essential to the understanding of commercial operations where food, drink and shelter are provided through supplier–customer interactions, the challenge for managerial academics is to consider how social and cultural forces influence the way in which operational factors are created and maintained (Lugosi, 2009).

### **2.2.3 Philosophy**

From a philosophical perspective, hospitality is depicted as a moral practice which involves welcoming, inclusion, reciprocity and sheltering. At this level, hospitality is not only limited to the provision of these services, but as Dikeç (2002) speculates, “it is an engagement between strangers, and not simply a duality of the guest and the host” (p. 236). Hospitality therefore implies the cultivation of an ethical and political engagement which suggests a respect for strangers.

As a contradiction to this thought, Derrida (2000) maintains that such pure forms of hospitality are unachievable and that the undertaking of hospitality encounters is always conditional, whereby there are obligations required of the host to ensure the well-being of their guests, whilst guests reciprocate by respecting and obeying these rules. This offering and acceptance thereby determine a boundary which is then crossed, consequently determining roles, identities and differences between host and guest. In Derrida’s opinion, Sheringham and Darawulla (2007) claim that pure hospitality can never be restricted by conditions. Sheringham and Darawulla further add that hospitality infringes thresholds of physical, psychological and symbolic character, and thus becomes a transgressive form of engagement whereby existing rules and positioning are provisionally discarded.

### **2.2.4 Sociology**

Everyday forms of hospitality, such as the provision of food, drink and shelter within a commercial transaction, are now offered through widespread provider-consumer interaction (Crang, 1994). Nonetheless, food and drink can be provided in a commercial environment where interaction between staff and customers is minimal, and sometimes even non-existent, which thereby provokes the suggestion that commercial provision may not involve any actual hospitableness (Lugosi, 2009). For this reason, it is possible to suggest that genuine hospitable behaviour has a real concern for providing pleasure,

protection, and assisting guests. However, when there are apparent ulterior motives to win favour, or gain advantage through vanity or financial gain, then behaviour may not be deemed hospitable (Ritzer, 2007).

### **2.3 Hospitality as Entertainment**

Several authors have endeavoured to define hospitality, and there is no doubt that both social and commercial activity are two of the foremost themes that have been explored. Brotherton (1999) clearly emphasises these two themes in his definition of hospitality as:

A contemporaneous human exchange, which is voluntarily entered into, and designed to enhance the mutual well-being of the parties concerned through the provision of accommodation, and/or food, and/or drink. (p. 168)

With this definition in mind, it is therefore important to recognise that inevitably with the offering of food, drink, and sometimes shelter, there will always be another key aspect of hospitality that is somewhat overlooked, and that is entertainment. King (1995) acknowledged a relationship between hospitality and entertainment when she concurred with Palmer's (1992) earlier work stating that hospitality is a process involving socially prescribed rituals. These rituals could extend to plays, music, and dancing for the guests' enjoyment, activities which have since become synonymous with hospitality.

A distinction between hospitality and entertainment was identified by E. Telfer (2000) who claimed that "hospitality was associated with meeting the needs, and entertaining with the giving of pleasure" (p. 39). She further adds that this difference is 'merely a nuance' and thereby regards entertaining to mean the same as providing hospitality. Conversely, when considering the social exchanges of hospitality in a commercial context, Lugosi (2008) acknowledges the importance of recognising these exchanges as a noticeable feature of hospitable transactions.

Entertainment in the form of humour and informal interaction between service staff and guests may form an integral part of the service encounter in some hospitality organisations (Gardner & Wood, 1991) and, although not necessarily vital to the service provision, can be fundamental to enhancing the overall hospitable experience. Certainly, as Hanefors and Mossberg (2003) affirm, "engaging and entertaining interaction often

goes hand in hand with the consumption of food and drink” (p. 256). This social and commercial entanglement has now given rise for further enquiry into this dimension of hospitality. King (1995), Lashley (2000b), and Lashley et al. (2007) have made a distinction between the domains of social, private, and commercial hospitality, and have recognised how socially and culturally defined principles induce commercial expression. It is this parallel that may suggest the co-creation of an occasion that contributes to the formation of hospitable experiences through notions of consumer encounters and hospitable space.

#### **2.4 Hospitality and Service Experiences**

Notions of hospitality experiences are recognised in Lugosi’s (2009) case study, whereby social and commercial forms of hospitality interact in a licensed bar type environment, through which consumer perceptions and practices, and front line staff engagement in service relationships, demonstrate how consumers’ perceptions and behaviour shape the production of hospitality. It further suggests that the bar’s operation is attached to a series of ideological conceptions surrounding safety, commonality, and leisure, which allow for mobilisation of the production and consumption of hospitality. This exemplifies the notion that hospitality may be co-created through consumers’ production and consumption of experiences.

These service experiences have been described using theatrical metaphors, in the literature on services management and consumer behaviour. A number of authors have also compared service delivery to drama (Berry, Zeithmal, & Parasuraman, 1985; Groonroos, 1985; Lovelock, 1981). For example, Grove and Fisk (1989) created a drama-metaphor framework whereby participants become actors and the audience at the same time, the physical evidence becomes the setting, and the process becomes the performance. This operational framework has been recognised as one of the first reasoned frameworks that analysed management of the service element, and concerned the performance of the actors and the effectiveness of the settings (Morgan, Watson, & Hemmington, 2008).

## 2.5 Experience Paradigms and Constructs

### 2.5.1 Theatre and Performance

William Shakespeare (1599) once wrote:

*“All the world’s a stage,  
And all the men and women are merely players”*

(As You Like It – Act 2, Scene 7: 257–263)

This quote can be applied to service staff, management and customers in a context that recognises their allocated spaces in the settings in which their roles are performed. Understanding the roles being performed by each of the participants in these settings can facilitate the ‘staging’ of these experiences, thereby enabling management to meet customer expectations and provide memorable experiences (Gibbs & Ritchie, 2010). As Morgan et al. (2008) have already identified, theatrical metaphors are apparent across numerous service industries, and suggest the idea that theatricality provides for the connection between the consumer and the provider. They make further reference to staff as cast either ‘onstage’ or ‘backstage’ in their example of the Disney Corporation, and extend the original services marketing model of the ‘4Ps’, namely Price, Product, Place and Promotion developed by McCarthy (1960), to include three additional variables suggested later by Booms and Bitner (1981). These variables included participants, physical evidence, and processes, which further defined all participants “as human actors who play a part in service delivery” (Morgan et al., 2008, p. 112).

Continuing the paradigm of theatre and performance in a service oriented perspective, Williams and Anderson (2005) claimed that customers “co-create the service offering” (p. 13) through the application of drama production principles, which are defined by the different roles which cast members and audience play out. This model of theatre and performance in food service spaces was earlier conceived in Grove and Fisk’s work (1989), which developed a framework around theatre and performance to analyse the experience of diners from a service encounter viewpoint, whereby customers absorb the roles of both actor and audience, in which the restaurant environment becomes the stage, and the whole process becomes a live performance. A suggestion was made by Gardner and Wood (1991), and Lundberg and Mossberg (2008), in that the way in which humans interact with each other is often influenced by interpretations inferred on them in the context of their surroundings.

### 2.5.2 Servicescapes

More recent research explores a paradigm which includes Bitner's (1992) notion of *servicescape* and contends that the physical environment influences behaviour and perceptions of service. The servicescape thereby becomes the stage on which the performance is set and the service encounter and the experience are jointly produced. She further distinguishes the interior servicescape, which includes design, equipment, layout and signage, from the exterior servicescape, which may include the landscape, parking, exterior design, and surrounding environment. A number of authors have since combined these models of servicescape in relation to food service experiences (Andersson & Mossberg, 2004; Gustafsson, Ostrom, Johnson, & Mossberg, 2006; Hansen, Jensen, & Gustafsson, 2005), exploring how both the stage and the performance influence these meal experiences. Many of the elements recognised by these authors refer to the tangible elements of the environment in which guests find themselves, and as Wakefield and Blodgett (1996) recognised in their study, the perceived quality of these servicescapes can be fundamental in determining the level of guest satisfaction.

Zomerdijk and Voss (2010) recognise that the way in which servicescapes are controlled and designed can assist customers in guiding their expectations by creating 'clues' and ultimately influencing their behaviour. Social interaction and engagement with spaces are also influenced through the effective use of lighting, colour, music, and space and can either hinder or facilitate consumers' reactions (Grayson & McNeill, 2009). In the case of a winery cellar door, such aesthetic variables become very apparent, alongside service staff whose embodied emotional performances become entangled in the experiential offer they are presenting (Gibbs & Ritchie, 2010).

From a wine tourism perspective, there has been little utilisation of the 'servicescape' context, despite literature indicating that wineries are now placed in an increasingly competitive market to attract visitors, requiring them to seek unique ways in which to enhance visitor experiences (McDonnell & Hall, 2008). Wineries may use the tangible clues of their physical design and their interior and exterior attributes to attract visitors and assess levels of satisfaction, as suggested by Zeithaml, Bitner and Gremler (2006). Although the potential significance of the surroundings in which wine tourism experiences occur is recognised as having importance to the nature of the experience, the role of servicescape has merely been acknowledged (Mitchell & Hall, 2001; O'Neill

et al., 2002). As the cellar door is generally the first point of contact for most visitors, providing a unique profile of the winery (including surroundings, layout, and staff) and gaining a better understanding of the servicescape may assist wineries in improving brand loyalty and customer experiences (McDonnell & Hall, 2008).

### **2.5.3 Experience**

Pine and Gilmore (1998) claim that the intention of the service performance is to create an experience for the customer through an 'experience economy' which has four dimensions: aesthetic, escapist, educational and entertainment. In their later work on experience management, Pine and Gilmore imply that this theatrical performance metaphor is implemented more strategically in the construction and management of experiences which dramatize the service performance, thereby creating unique experiences in an emerging 'experience economy' (Pine & Gilmore, 1999). Pine and Gilmore further claim that drama becomes any activity where one group performs in front of another group and the activity is then analysed in terms of the activity engaged in between the frontline personnel and the consumers. This drama then becomes the strategy of a service orientated company, which then becomes the service roles that staff must perform in order to achieve the goals of the company.

This concept argues the point that rather than theatre becoming a metaphor for the work performed, it is to a certain extent a model of reality. The intention therefore is to create an impression and generate an emotional response from the consumer, the participant of the drama (Gibbs & Ritchie, 2010), which Gardner and Woods (1991) propose is often in the hope of increasing sales and gratuities.

The role of experience in this respect appears to be production-centred, which Morgan et al. (2008) have criticised for being too superficial due to its emphasis on the stage management, direction and design of the experience. Neither does it allow customers to create experiences that suit their own needs and level of engagement, and enactment (Prahalad & Ramaswamy, 2004a). Positioning this view in a cellar door environment, one would expect visitors to actively interact with the physical setting, other visitors, and service staff to create their own personal experiences through this interaction, whereby a consciousness and understanding of 'others' will be developed, as intimated by Ingemar Lindh (Camilleri, 2008). This notion of co-creation validates that the roles of the consumer, the setting, the staff, and the product all have a significant part to play

in the overall experience that is used to market today's products and services. (Camilleri, 2008; Gillespie, 2001; Morgan et al., 2008).

## **2.6 Behaviour and Experience**

Hemmington (2007) suggests a framework which identifies encounters in the hospitality domain as a series of interactions between 'host and guest' and therefore redefines hospitality as 'behaviour and experience' providing operators with new perspectives to consider in terms of the experience environment. These experience environments are co-created by the interaction of the customer with the facilities and settings provided by the company (Morgan et al., 2008).

In the behaviour-experience framework, Hemmington (2007) claims that there are five dimensions that unite to create guest experiences that become unique to the individual. These are i) host-guest relationship, ii) generosity, iii) theatre and performance, iv) 'lots of little surprises', and v) security of strangers. In this sense, he builds on the founding principle that distinguishes hospitality, namely that of the reciprocal motives underpinning host-guest relationships. He recognises the economic requirement for hospitality businesses to generate financial gain through the products and services that are offered, which can often lead to tensions, requiring guests to pay costs incurred for additional 'add-on' services and products. A suggestion that businesses may subtly absorb these costs into the overall price charged may develop a better feeling of generosity amongst guests.

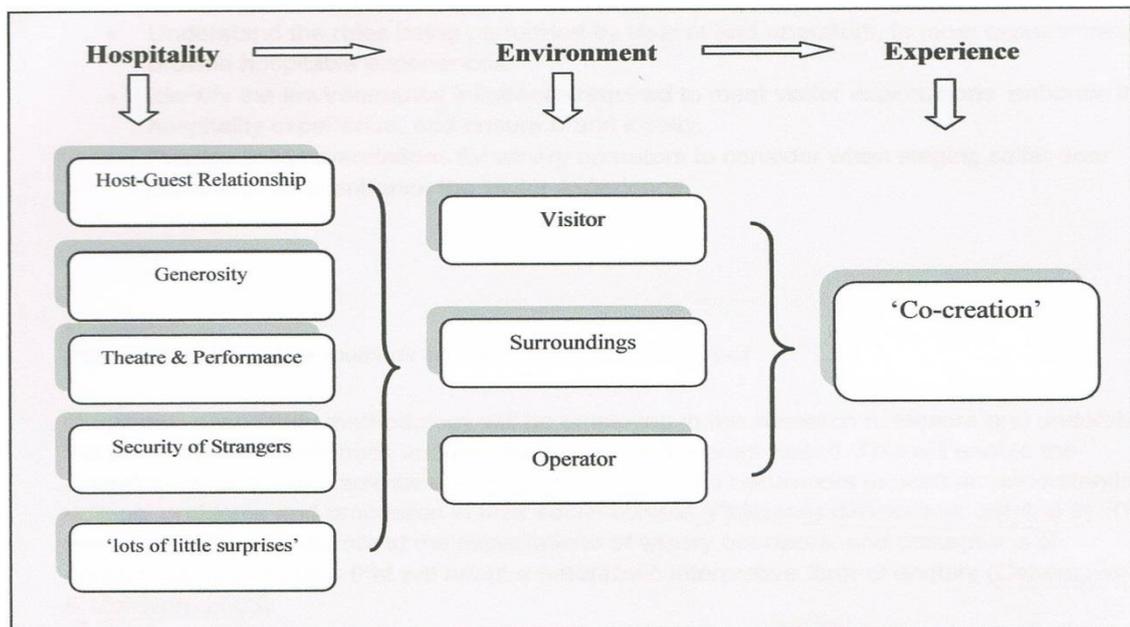
In a metaphorical sense, theatre and performance, already discussed in the earlier review of this literature, are significant in the field of hospitality where staff have an obligation to 'perform' in restaurant settings. Staff, as the cast who are required to serve guests, require the appropriate training and development, in order that these skills can be performed naturally, and almost become the consultants in their field (Kivela, Inbakaran, & Reece, 2000), serving dishes with apparent flamboyance and grace.

Hospitality experiences can take place over varying amounts of time, short cafe stops, several hours for a meal, weekend breaks away in a hotel, or even an extended vacation in a resort. Where the experience and performance may be exposed over time, operators need to recognise this and reveal experiences over this period to maintain interest and continue the excitement, which could be exemplified through '*lots of little surprises*'. Cellar doors are clever in this practice, by offering different, bite-sized food samples

between wine tastings, which often depict the food style and character served in their establishments. “In truly hospitable environments guests are looking for something special that gives surprise and delight” (Hemmington, 2007, p. 753). An example may involve providing restaurant diners with an ‘amuse’ prior to ordering their meal, which would involve presenting a surprise small dish to tantalise guests’ palates.

The final dimension of the behaviour-experience model recounts Telfer’s (2000) notion that one of the fundamental responsibilities of any host is to their guests’ safety.

Hospitality guests are often placed in a position of unfamiliarity with their surroundings, in which they have to rely on their hosts to instil a sense of safety and security (Gill, Moon, Seaman, & Turbin, 2002; King, 1995; E. Telfer, 2000). Security is often apparent from a commercial and financial perspective, but from a guest’s view the *security of strangers* should be clearly visible and an evident priority.



Source: Adapted from Hemmington (2007)

**Figure 2.** Co-creating hospitality experiences at the cellar door: A conceptual framework.

This ‘behaviour–experience’ framework, which was applied to a restaurant context, contributes to a holistic wine tourism approach to show the effects of the interaction of the operator, visitor and the surroundings, thus enabling the co-creating of hospitable experiences at the winery. This concept forms the underlying basis for a conceptual framework (see Figure 2), which will position the research being undertaken and communicate how the co-creation of cellar door experience is conceived (Pearce, 2012).

## 2.7 Co-Creating Experiences

In an economy where consumers are presented with several choices in terms of products and services in the marketplace, they become more informed and empowered, to the point that their expectations are ever changing and becoming increasingly higher.

Consumer expectations about a meal experience, visit to a theme park or even a hotel stay are incessantly shifting, which means that organisations are required to anticipate and respond to these expectations by creating and offering a unique service experience (Chathoth, Altinay, Harrington, Okumus, & Chan, 2013).

Organisations have been encouraged to construct convincing offerings to their consumers and, in the case of hospitality providers, this involves engaging service staff and customers in both the production and consumption of the experience. A concept that Toffler (1980) labels '*prosumption*' refers to the way in which both the consumer and provider interconnect to create an experience which meets the demands and expectations of the consumer. Applied to a hospitality context, the host may become the provider and the consumer is the guest, and consequently both adopt behaviours in which the host and guest co-create the value in experiences together (Meuter, Ostrom, Roundtree, & Bitner, 2000). This emphasises the importance of consumers taking an active part in the design and outcome of the experience.

Prahalad and Ramaswamy (2004a) justify this 'behaviour–experience' framework as a way in which consumers in a more industry orientated market have changed from isolated to connected, and therefore become more informed about services and products in the marketplace. Companies can no longer act freely designing and producing new products without intervention from consumers, and consequently are required to create a variety of experiences through the co-creation of value through personalised interactions which are meaningful and sensitive to a specific customer. They subsequently argue that positive consumer experiences are often dependent upon active consumer participation in a creative process involving active dialogue and co-construction of personalised experiences (Prahalad & Ramaswamy, 2004b). Chronis (2012), likens these interactions to a narrative presentation in which, participants become 'story-builders' whose duty is to construct a narrative based on the integration of resources available to them.

This thought that consumers (or customers) participate in both the production and consumption of an experience has been positioned in a tourism context with particular reference to Prebensen and Foss's recent work (2011), who explored how tourists

manage and co-create experiences in various situations with diverse people during a holiday. Their findings suggest that the more beneficial that tourists perceive their experiences to be, the more active they become in the co-creation of various situations they are presented with. As a consequence, the tourist becomes more involved in the situation and changes the dynamics of the experience (Prebensen & Foss, 2011).

## **2.8 In the Beginning. . . Wine Tourism**

Wine has often been linked to socialising, relaxation, hospitality and learning about new things (Dodd, 1995) and, when consumed in moderation, can be regarded as a source of sensual and pleasurable activity aimed at personal enjoyment (Bruwer & Karin, 2009). Visits to a vineyard have been a feature of organised travel since the mid- nineteenth century when young European aristocrats embarked upon the Grand Tour, and more attention was given to wine as a specific travel interest. Simultaneously, the development of transport networks, such as railways, made wine regions more accessible to an increasing social middle class, who began to recognise and appreciate quality wines alongside the aristocratic travellers (Hall, Johnson, et al., 2000). From a visitor perspective, wine tourism allows the opportunity for visitors to experience a distinct sense of place through the discovery of a region's unique offerings in terms of the wine, rural landscapes, and other gastronomic delights.

Since the early 1920s, wine trails have become an emerging part of the tourism industry, particularly in the prominent Old World winemaking countries such as Germany, France, Spain and Italy. In the New World wine countries, New Zealand, USA and Australia have also observed an increase in wine related tourism, although the origins of wine tourism research did not begin to emerge as an area of academic interest until the mid-1990s (Mitchell & Hall, 2006). Hall, et al (2000), state:

That this relationship [between the wine and tourism industries] has come to be explicitly recognized by governments, researchers, and by the industries themselves, and there is now a significant body of literature to suggest that the relationship between wine and tourism has a significant role to play in the international scenario of both these industries (p.7).

Wine tourism is acknowledged as an increasingly popular area of special interest tourism throughout Australasia and is recognised as having significant importance to the regional tourism product, consequently making it a substantial element of the business

strategy of many wineries (Alonso, Fraser, & Cohen, 2007b; Bruwer, 2004; Carlsen & Charters, 2006).

Growth in wine tourism has become a global phenomenon and involves seeking a specific destination, site or event related to wine (Getz, Carlsen, Brown, & Havitz, 2008). This form of special interest travel based on a visitor's aspirations to visit vineyards and wine producing regions, or in which visitors feel the motivation to visit wineries whilst travelling for other reasons, has in recent years been defined as wine tourism (Getz, 2000). As noted, a more widely cited definition of wine tourism is an experience of "visitation to vineyards, wineries, wine festivals and wine shows for which grape wine tasting and/or experiencing the attributes of a grape wine region are the prime motivating factors for visitors" (Hall, Sharples, et al., 2000, p. 3).

The quest for finding and visiting wineries, vineyards, wine festivals, and events at which wine tasting and other aspects of the specific wine region are the prime motivations for visitors, have also been attributed to wine tourism by Hall and Macionis (1998). Additionally, Charters and Ali-Knight (2002) depict wine tourism as an encounter in which cultural heritage, hospitality, dining, education and cellar door sales are contributing factors to the overall wine tourism experience. Extensive research recognises, therefore, that the creation of pleasurable, educational and memorable sensory experiences is a sound motive for the development of wine tourism (Carmichael, 2005; Charters, Fountain, et al., 2008; Griffin & Loersch, 2006; Pikkemaat, Peters, Boksberger, & Secco, 2009). A further distinction has been observed between wine tourism and winery visits by Galloway, Mitchell, Getz, Crouch and Ong (2008) recognising the latter as the predominant factor of the overall experience.

Wine tourism involves many segments including services, industry, agriculture, and transport, as well as a natural and cultural environment, thereby becoming a complex system made up of many components (Asero & Patti, 2011).

## **2.9 Wine Tourism in New Zealand**

The development of wine tourism, particularly in New World countries such as Australia and New Zealand, has become increasingly apparent over the last decade (Charters & Ali-Knight, 2000). In 2013, more than 200,000 tourists were reported to have visited a winery in New Zealand (New Zealand Tourism, 2014). Many of these tourists were reported as travelling by commercial ferries or boats (37%), the second

most popular mode of transport after cars or vans (66%). It is apparent that the New Zealand wine industry is an important contributor to the New Zealand economy, with international wine tourists in 2013 accounting for an average spend of \$3,700, compared to the \$2,800 average spend of all other visitors (New Zealand Tourism, 2014).

## **2.10 The Wine Tourist**

The demand for wine tourism embraces “the motivations, perceptions, previous experiences and expectations of the wine tourist” (Hall et al. 2000, p. 6). Research undertaken confirms that the predominant drivers motivating wine tourists are to purchase and consume wine (Alant & Bruwer, 2004). Secondary motivating factors, such as education, socialisation, travel, and relaxation, also refine the overall experience that wine tourists seek (Carmichael, 2005). In this sense, literature surrounding the ‘wine tourist’ generally concentrates on three major areas: (1) demographic or psychographic profiles of wine tourists; (2) marketing to tourists through wine routes, festivals and events; and (3) satisfactions and motivations of tourists visiting the winery tasting rooms (Carlsen, 2004; Mitchell & Hall, 2006).

Hinch and Higham (2001) have already established that tourists are travellers who ultimately return home following their excursions. The New Zealand Ministry of Tourism (2009) has broadly identified wine tourists as those domestic and international visitors, aged 15 years and over, who visit a winery at least once during their stay in New Zealand. A more specific segmentation of wine tourists has been identified by Charters and Ali-Knight (2002), who categorise wine tourists into four specific groups: namely, wine lovers, wine connoisseurs, wine interested and wine novices. This categorisation and identification implies that visitors to vineyards and wineries bring with them a variable level of understanding, knowledge, and enthusiasm pertaining to the wine product. The process of segmenting and profiling winery visitors has not only permitted wine producers to make easier the process of identifying their consumers, but has also assisted in identifying a number of their characteristics (Alonso, Fraser, & Cohen, 2007a).

Research concerning the experiences and behaviour of wine tourists in tasting rooms, or cellar doors as they are commonly called is very prevalent, and has been acknowledged as a thriving way in which winemakers can establish and strengthen loyalty amongst their consumers (Mitchell & Hall, 2004). More recent qualitative research, by Charters,

Fountain and Fish (2008), has examined a number of ideas relating to visitors' experiences in the tasting room of wineries in Australia and New Zealand. These thoughts take into consideration not only the aesthetics of the tasting room, but also the actual size of the winery, and the service experience encountered.

In addition, Asero and Patti (2011) explained that research conducted on wine tourists' behaviour can assist in the development of wine tourism, in order that winery operators can use the research to help understand and manage wine tourism demand at their wineries. Despite the value and contribution of these studies in endeavouring to gain a greater understanding of the 'wine tourist', further investigation into the behaviour, motivations, and lifestyle of winery operators, not just their visitors, still has potential for further research.

### **2.11 The Winery Operator**

Despite an ever increasing volume of literature concerning wine tourism that has investigated winery experiences, many knowledge gaps are still apparent, particularly on the supply side with reference to winery proprietors and managers (Alonso, Bressan, O'Shea, & Krajsic, 2012). Much of the literature concerning winery operators pertains to the need for winery operators to pay attention to developing ongoing customer relationships with the intention of creating greater brand loyalty. As Fountain, Fish and Charters (2008) revealed, a winery tasting experience requires winery staff to establish an emotional connection between the visitor, the winery, the product and the winery staff.

The encounter between the consumer (wine tourist) and the provider (winery operator) encourages the provider to 'put on a show'. If, however the metaphor is applied in a deeper way, in which the wine tourist is not seen as the audience but rather a participant in the show, then the winery operator's duty becomes one of providing an environment in which the experience is co-created. From the winery operator's perspective, this will require flamboyance, imagination and an understanding of the wine tourist, as well as the ability to act spontaneously when required. Therefore, the theatrical metaphor reinforces the traditional view of these service experiences as an art that requires gifted individuals to create an experience in which capable consumers will appreciate the encounters they engage in.

## 2.12 Co-Creation of Cellar Door Experiences

Alant and Bruwer (2004) imply that one of the most important factors considered by wine tourists when visiting wine regions is the visit to the cellar door, sometimes referred to as the 'tasting room experience'. This experience usually involves visitors being given the opportunity to taste wines produced from the specific winery and will sometimes allow visitors to interact with the winemaker, or indeed other members of staff. This suggests that the cellar door becomes the 'public face' of the winery, which provides the opportunity for visitors to form an opinion about the winery operation (O'Neill et al., 2002).

The tasting room experience is regarded as significant in the tourism environment. As with many forms of tourism, the service encounter has a vital part to play in the link between service encounters and customer satisfaction (Gronroos, 1988; Reicheld & Sasser, 1990). Furthermore, wine tourism literature now suggests that customer satisfaction can have an impact on post-purchase beliefs, future purchase intentions, and long term customer loyalty (Mitchell, 2006; O'Neill & Charters, 2006).

In earlier research literature around tasting rooms, it was evident that researchers paid particular attention to the environment and natural surroundings of the experience. Those tangible attributes, which included the buildings, natural environment, taste of the wine, facilities, and information provided, were often the most important factors that contributed to the overall experience (Dodd, 1995; Morris & King, 1997). More recent research has begun to look at customer satisfaction, and customer interaction in the tasting room. Pertinent to this research project is the work of Roberts and Sparks (2006), who noted a wide range of motivating factors for wine tourists, which suggested that a vital part of the tasting room experience was the hospitality received, as well as the desire for personal attention, and the authenticity of the experience they encountered. In addition, the motivating factor of an opportunity for personal development in wine knowledge confirmed previous work undertaken by Ali Knight and Charters (1999).

Cellar door visits are also vital to the individual winery operator in that they allow the opportunities for wineries to establish a link between brand association and the cellar door, where the cellar door can assist in developing and reinforcing the image and quality level of the brand (Lockshin & Spawton, 2001). Cellar door visits are also of additional benefit to their operators in that they offer minimal distribution costs, which

result in higher profit margins as a result of cellar door sales (Charters & O'Neill, 2001). This factor is of particular relevance for smaller wineries, where cellar door visits play a significant part in their sales distribution channel.

As has already been identified, the cellar door visit presents an ideal opportunity for wineries to establish relationships with their customers, which may result in brand recognition and long term loyalty, and may even result in visitors seeking out particular wines when they arrive home (Charters & O'Neill, 2001; O'Neill et al., 2002). The option of providing tasting room facilities for visitors is one that operators recognise as an important platform in establishing a sustainable and loyal market with a view to becoming successful operations (Charters, Fountain, et al., 2008). This research study attempts to support these findings, and warrant the proposition that engagement between winery operators and their visitors will enhance the cellar door experience.

### **2.13 Conclusion**

It is evident that, in the last two decades, there has been a well-documented interest in wine tourism, with growing popularity that has seen it emerge as an increasingly important area of tourism not only throughout New World countries such as New Zealand, but also in many other countries throughout the world. This chapter has discussed a number of concepts related to wine tourism and cellar door experiences that will be employed in this project to explore and understand some of the expectations of winery operators and perceptions of winery visitors, using a naturalistic interpretive form of enquiry. Whereas wine tourism literature is increasing, there remains a knowledge gap in understanding the synergies between winery visitors and operators in the co-creation of experiences at the cellar door. The following chapters present ways to understand, identify and describe how effectively wineries on the island of Waiheke utilise the various concepts outlined in this chapter, to co-create a cellar door experience in their interaction and promotion of their products and services at their wineries.

Chapter 3

# Methodology



Looking out to Matiatia Bay

# Methodology

### 3.1 Introduction

This chapter explains in depth the methodological approach and research design that has been employed in this study. It commences with an overview of the study and the aim and objectives as outlined in Chapter 1. A rationale for the selection of an interpretive research paradigm is discussed and, in particular, the value of a case study research strategy is introduced. This is supported by an explanation of the tools and specific processes of data collection and analysis. The ethical issues that have been taken account of in the design of this project will also be outlined. There is also a self-reflective account of the methodological approach that has been adopted for this study. Careful consideration has been given to the appropriateness of this research methodology to ensure that an extensive examination of all relevant areas has been undertaken.

### 3.2 Overview of the Study

The aim of this study is to establish how winery operators deal with the heterogeneous expectations of their visitors to co-create hospitality experiences and gain a competitive advantage. Taking into account the purpose of this research, a qualitative approach was deemed the most appropriate to adopt for two main reasons. Firstly, as outlined in Chapter 1, the research seeks to understand, identify, and describe how effectively the wineries co-create the various dimensions of the encounters, interactions and experiences at the cellar door. Strauss and Corbin's (1990) view that qualitative research assists in revealing and understanding the underpinning of any phenomenon about which little is known, is supportive of this aim. Secondly, the individual perceptions of winery operators and visitors to the cellar door will differ to a great extent and are influenced by a number of variables. As such, these variables would be difficult to explain through quantitative methods which offer more standardised measures, as exploratory research has yet to determine what the key variables to measure might be.

### **3.2.1 Research Aim and Objectives**

The overall aim of this research is to establish: *How do winery operators deal with the heterogeneous expectations of their visitors to co-create hospitality experiences and gain a competitive advantage?* Reflecting upon the general themes and trends identified in the literature, the following three objectives were derived from the overall research aim:

- To critically analyse the co-creation of roles and experiences, by visitors and operators, to meet expectations and provide hospitable experiences.
- To evaluate the environmental and social influences required to meet visitor expectations, enhance the hospitality experience, and ensure brand loyalty.
- To provide recommendations for winery operators to consider when staging cellar door experiences, to enhance the visitor experience.

### **3.3 Research Theory and Theoretical Paradigms**

This research sought to compare winery visitor experiences at the cellar door, to the intentions of winery operators in their interaction with these visitors as they attempt to co-create a hospitable experience for those visitors. As such comparisons would be best understood through discussions with both visitors and winery operators on their personal stories and reflections of experiences at the cellar door, a qualitative approach was considered the most appropriate research method to adopt.

Defining knowledge and determining how it is acquired is usually the result of either deductive theory testing, or inductive theory building. Deductive theory represents the most common view of the nature of the relationship between theory and research (Bryman & Bell, 2011), and is primarily the domain of quantitative research methods where a hypothesis is subjected to empirical scrutiny. Conversely, with an inductive stance, theories are developed through the research, which pertain to the collective reality of the phenomenon being investigated, as a result of the data that have been collected (Hesse-Biber & Leavy, 2006). An inductive approach was therefore considered the most suitable approach for the purpose of this study.

### **3.3.1 The Inquiry Paradigm**

Researchers need to consider the subjectivity of their ethics, values, and politics, and use a range of interconnected interpretive methods to maximise understanding of the research problem (Goodson & Phillimore, 2004). This set of beliefs is known as a paradigm, which Guba and Lincoln (1994) propose is comprised of three components: ontology, epistemology and methodology. They further state that “inquiry paradigms define for the inquirers what it is they are about, and what falls within and outside the limits of legitimate enquiry” (Guba & Lincoln, 1994, p. 108).

In this sense, ontology questions the nature of reality, while referring to claims or assumptions that a particular approach to social enquiry makes about the nature of social reality (Denzin & Lincoln, 1998). Epistemology seeks to understand knowledge and how it is acquired through an interaction between the researcher and the participant (Guba & Lincoln, 1994). It is interested in the origins and nature of knowledge, and the claims and assumptions that are made about what the nature of knowledge is (Guba & Lincoln, 1998). Finally, methodology provides the process of finding knowledge (Guba & Lincoln, 1994), and relies on the combination of the researcher’s ontological and epistemological views, in terms of their definition of reality, and the nature of their knowledge enquiry (Goodson & Phillimore, 2004).

### **3.3.2 The Researcher’s Assumptions**

How we observe the reality of life affects the way that we learn about it. Prior to conducting this research, I had to ask the question: “What is the existence of reality?” In my assumptions, I would agree with Guba and Lincoln (1994), in that reality is socially and locally constructed. To investigate the winery operators’ heterogeneous expectations of their visitors, I assumed that research participants’ implicit meanings, experiential views and my final grounded theoretical model are constructions of reality (Charmaz, 2006). My research approach clearly assumes that any theoretical interpretation offers an interpretive portrayal of the studied world, not an exact picture of it (Charmaz, 1995; Guba & Lincoln, 1994; Schwandt, 1994). Unlike the classic theory works that Glaser and Strauss discuss, that see theory as ‘emerging’ from data separate from the scientific observer, I have assumed neither data nor theories will be ‘discovered’. Rather, through the participants’ experiences and perspectives, grounded theories will be constructed through past and present involvements and interactions with them, and my analyses of these (Charmaz, 2006).

My epistemological viewpoint is induced by the question: “What is knowledge and how is it acquired?” The assumption here that fits for me is that findings are generated through the interaction between the researcher and the participants (Guba & Lincoln, 1994). In essence, the researcher is not endeavouring to make sense of a social process, but rather involves “getting inside the world of those generating it” (Rosen, 1991, p. 8). The aim is to realise, with a holistic view, how winery operators interact with their visitors to co-create hospitality experiences to thereby gain competitive advantage. Given my world view and the research question, it was appropriate that an interpretivist approach was adopted. This means I will endeavour to understand occurrences through the interpretations that people assign to them (Myers, 2010).

### **3.4 Adopting a Qualitative Approach**

The research undertaken was twofold. It first sought to identify the understanding of winery operators in terms of their perceptions of how various dimensions are created in a cellar door experience during the interaction with their visitors to co-create experiences. Secondly, it examined winery visitors’ perceptions and expectations of their cellar door visit. A qualitative research method was employed as the research sought to understand participants’ personal experiences of phenomena and provide individual case information (Johnson & Onwuegbuzie, 2004). Qualitative methods have sometimes been criticised for what Goodson and Phillimore (2004) refer to as a “soft, non-scientific” and an inferior approach to study. In the design of this project, it was therefore necessary to fully understand the strengths and weaknesses of all methods adopted to avoid potential intrinsic issues that may affect the research design.

Furthermore, by adopting a qualitative research methodology, it allowed for observation of participants’ experiences at the wineries, providing the opportunity to understand the meaning of people’s actions and opinions (Myers, 2010). Qualitative research permits a naturalistic interpretive approach to be adopted (Cohen et al., 2003), allowing rich descriptions and experiences to be obtained from the participants (Marshall & Rossman, 1999). Additionally, if open ‘how and why’ questions are used as a method of data collection, qualitative methodology will facilitate a greater in-depth study and understanding of the issues (Denzin & Lincoln, 2005).

Qualitative research has a tendency to be used as a set of methodological tools rather than ‘thinking’ tools in tourism research (Goodson & Phillimore, 2004), thereby allowing researchers to consider alternative approaches to research. Riley and Love

(2000) affirm that although tourism research requires quantification due to the financially driven nature of the industry, qualitative research provides an important lens from which to view a given phenomenon. The human dimensions of society can also be further understood from a qualitative perspective, which in tourism includes its social and cultural implications. Tourism therefore must embrace a general recognition of the legitimacy of diverse research tools (Walle, 1997). In this regard, it is proposed that neither a qualitative nor quantitative approach should take preference over each other, and that the ideal approach is the one most appropriate for the designated task or research question (Veal, 1997).

Qualitative research can include a wide range of strategies that researchers may consider using, such as those drawn from phenomenology, ethnography, action theory, grounded theory, and case studies (Denzin & Lincoln, 2005). It is vital that there is careful consideration and selection of an appropriate method, in order that the researcher can then endeavour to develop a research theory and how the research should commence (Hesse-Biber & Leavy, 2006). Denzin and Lincoln (2005) state, “a research design describes a flexible set of guidelines that connect theoretical paradigms first to strategies of inquiry and second to methods for collecting empirical materials” (p.25). Taking this into consideration, a qualitative case study strategy of inquiry has been adopted, in which to undertake this particular research project.

Qualitative research enabled engagement in the activities and experiences of both the winery operators and visitors to the wineries. Qualitative research, according to Merriam (1988), embraces both diversity and variability, as it seeks to explore the interrelationship between the participants and their subjective experiences. Berg and Lune (2012) further add:

Qualitative techniques allow researchers to share in the understandings and perceptions of others, and to explore how people structure and give meaning to their daily lives. Qualitative research enables researchers to examine how people learn about and make sense of themselves and others. (p. 8)

Finally, Silverman (2006) proposes that the greatest advantage to adopting a qualitative research approach is that this approach allows the researcher the ability to analyse what actually happens in naturally occurring settings.

### 3.5 Grounded Theory Methodology

Grounded theory has been described as a research methodology employed to designate theory and theory development that is grounded in empirical data, as opposed to theory that is logically derived (K. M. Williams, 2011). It was originally developed by two American based sociologists, Barney Glaser and Anselm Strauss, who subsequently published in 1967, *Discovery of Grounded Theory*. Primarily, grounded theory methodology is based on the beliefs that the collected data should be clearly grounded in the field of study; that the derived theory is a conceptual abstraction which arises out of the data; and that the process of research comprises concurrent data collection and constant comparative analysis, leading to theoretical sampling thereby continuing to refine conceptual categories (Charmaz, 2006; Lacity & Janson, 1994; K. M. Williams, 2011).

Grounded theory is one that is inductively derived from the study of the phenomenon that it represents. That is it is discovered, developed, and provisionally verified through systematic data collection and analysis of data pertaining to the phenomenon. Therefore, data collection, analysis, and theory stand in reciprocal relationship with each other. One does not begin with a theory, then prove it. Rather one begins with an area of study and what is relevant to that area is allowed to emerge (Strauss & Corbin, 1990, p. 23).

In the classic theorists' work of Glaser and Strauss, they suggest that the theory is discovered as emerging from data separate from the scientific observer. However, more recent theorists such as Charmaz (2006), assume that neither data nor theories are discovered, rather that our theories are constructed through our past and present involvements and interactions with people, perspectives, and research practices. My approach will assume that any theoretical interpretation of the data offers an *interpretive* depiction of the research phenomenon, keeping in mind that research participants' implicit meanings, experiential views, and the final grounded theories are constructions of reality, not singular 'truths' waiting to be 'discovered' (Bryman, 2001; Guba & Lincoln, 1994; Schwandt, 1994).

#### 3.5.1 Constructivist Grounded Theory

This study will endeavour to understand how effectively wineries on the island of Waiheke co-create the various dimensions of cellar door experiences in their interaction and promotion to visitors to the wineries. It adopts a constructivist approach, thereby

studying ‘how’ and ‘why’ participants construct meanings and actions in precise circumstances. A constructivist approach therefore involves more than looking at how individuals view their situations in terms of theorising the interpretive engagement of participants, but also recognises that the resulting theory has an explanation (Bryant, 2002; Charmaz, 2000).

In an attempt to make certain that data emerge from the field of study, researchers endeavour to enter the field aware of any preconceived ideas regarding what they may find through their research. The grounded theory researcher therefore has to be able to determine, as far as possible, that theory has developed directly from the data findings. As the sole researcher, it is important to acknowledge my familiarity and experience within this field of study, as has been described in Chapter 1 (Charmaz, 1995; Strauss & Corbin, 1998). Having experience within the wine industry has naturally alerted me to particular practices that participants may describe. Contrarily, having experience within this field may also inform me of some of the experiences participants are describing.

Researchers using a grounded theory approach are challenged to be able to maintain a connected yet distant relationship within their field of study (K. M. Williams, 2011). As the researcher enters into the participants’ world to understand the phenomenon under investigation from their perspective, a connection is therein made. Yet, also remaining somewhat distant from the relationship enables the researcher to achieve two aims. Firstly, maintaining some distance from the data can assist the researcher to more effectively conceptualise and analyse it. Secondly, it allows the researcher to deal with his or her own preconceived ideas, to the degree that distancing oneself from the field is effective.

Glaser (1991) claims that grounded theory is both an inductive and deductive method of research. It is inductive in that the theory that emerges is grounded in the collected data, and deductive in that the data analysis moves through accumulative levels of abstraction into theory. Glaser (2013) strengthens the significance of an emergent design when he states that “grounded theory allows the relevant social organisation and social psychological organisation of the people studied to be discovered, to emerge – in their perspective” (p. 5).

The grounded theory method depends upon adopting constant comparative methods and the researcher’s engagement (Charmaz, 2006). Making comparisons between data gathered enables the researcher to add conceptual depth to developing codes and

categories thereby advancing their conceptual understanding. Coding is construed for this study as the analytical process in which data are broken into codes, conceptualised, compared and then integrated again into constructs that explain processes (Strauss & Corbin, 1998). This process is often referred to as constant comparative analysis and denotes that the different dimensions and properties of developing categories and the connections between different categories are made explicit. The changing nature of a phenomenon according to changing context or perspective thus provides some understanding about basic social and psychological processes (Glaser, 2001; Lacity & Janson, 1994).

Constant comparative analysis is achieved by comparing data in what is described as an iterative process (or repetitive process). Concepts emerging from the data are constantly compared with other data to measure similarities and differences (Glaser, 2001; Quadri-Felitti & Fiore, 2013). The constant comparative analysis raises questions about properties and characteristics of a concept or category which as a result directs further analysis and collection of data in the quest for an answer to these questions.

Data collection is guided by a sampling strategy known as theoretical sampling. In line with the requirements of grounded theory, theoretical sampling determines the questions that are asked in subsequent interviews of participants (Strauss & Corbin, 1990). Theoretical sampling is “the process of data collection for generating theory whereby the analyst jointly collects codes, and analyses his data and decides what data to collect next and where to find them, in order to develop his theory as it emerges” (Hollinshead, 2010, p. 36).

As the researcher begins to engage with participants, writing the theory commences. The writing process is continuous throughout the study and is stored in the form of memos or field notes. Memos are written throughout data collection and are the theorising write-up of ideas about codes and their relationships as they occur to the analyst whilst coding and exploring emerging ideas from a variety of perspectives (Hollinshead, 2010). They are vital for conceptualising during the analytical process as well as in demonstrating the researcher’s reflective process. Furthermore, as Hutchinson (1983) indicates, all types of memos leave an audit trail for research and provide data for presentations, publications and possible further research.

Through these means, data are continuously compared with all other data following the grounded theory format of coding, constant comparative analysis and the development

of categories (Howley & Westering, 2008). Constant comparison of the data will enable the researcher to find similarities and differences. Sequential comparisons of the data enable the researcher to establish analytic distinctions and thereby make comparisons at each level of the analytic work (Charmaz, 2006). The coding occurs at three levels: 1) open coding or initial coding, 2) selective or focused coding, and 3) theoretical coding (Charmaz, 2006; Howley & Westering, 2008). This process of coding thereby provides a focused way of observing the data, enabling the researcher to make discoveries and gain a deeper understanding of the empirical world (Charmaz, 2006, p. 70).

### **3.6 Case Study Approach**

Both quantitative and qualitative research involve the researcher seeking to answer questions that are generally constructed with ‘who’, ‘what’, ‘where’ and ‘when’ types of questions. A case study strategy of enquiry allows questions that were constructed using ‘how’ and ‘why’ to be explored, where there was little control over events taking place in a contemporary, real life context (Yin, 2009). As Yin (2009) suggests, questions that ask ‘what’ are exploratory and can be applied to either quantitative or qualitative research methods. However, ‘what’ type questions that are used to develop propositions for further study are more applicable to case study methodology (Yin, 2009).

Qualitative case study methodology provides the opportunity to explore and understand how both the roles of the winery operators and the visitors engage in dialogue and interaction that help to create a hospitable experience at the winery cellar door. In order that the original research objectives are answered, both an exploratory and explanatory technique have been incorporated into the interview questions for winery operators and visitors (see Appendix A). Furthermore, the study explains how other external factors contribute to the experience of visitors to the cellar door at the wineries on Waiheke Island. The case study approach is particularly useful in such situations where the research topic is required to be described broadly (Yin, 2003). The advantages and disadvantages associated with case studies are illustrated in Table 1, as summarised by Jennings (2001).

Case study research allows the opportunity for full, rich, and deep descriptions of the participants’ perceptions, for example views of winery operators on what they think their visitors are expecting from a cellar door experience, as well as visitors’ expectations when visiting a cellar door. One of the key advantages of case studies is that they give access to in-depth data. Through these events, relevant occurrences/

incidents can be highlighted, thereby enabling detailed analysis and understanding that other less analytical strategies are unable to provide (Cohen et al., 2003; Marshall & Rossman, 1999). Furthermore, the case study approach allows opportunity for participants to verify the accuracy of the evidence, thereby reducing the risk of bias from the researcher’s perspective (Jennings, 2001). In contrast, a potential disadvantage of case studies is that they do not assume a singular focus of the research at the beginning, but provide an emergent focus. In addition, broad generalisations might not be able to be made beyond the cases studied, due to the sensitivity of findings with the particular case.

**Table 1.** Advantages and disadvantages of a case study approach

Advantages	Disadvantages
<ul style="list-style-type: none"> <li>• Permits in-depth data</li> <li>• Evidence is grounded in the social setting being studied</li> <li>• Accuracy can be verified by study members</li> <li>• Possible elimination of researcher bias due to member checking</li> </ul>	<ul style="list-style-type: none"> <li>• Research focus not clearly stated at the start (emergent focus)</li> <li>• Possibility of denied reproduction of evidence due to member checking</li> <li>• Potential of bias in data collection, analysis and findings</li> <li>• Findings are specific to case, non-generalisability to other cases</li> </ul>

Source: Adapted from Jennings (2001, p. 178)

Case study design includes both single and multiple cases, and as Yin (2009) points out, “case studies can be used in many situations to contribute to our knowledge of individual, group, organisational, social, political and related phenomena” (p. 4).

Patton (2002) further comments that case studies may be carried out on several participants within any evaluation of a single organisation, or multiple organisations as participants in a ‘case’. This thereby allows for cross comparisons of activities, consequently enabling analysis of the individual cases to be included as part of the data that ultimately contribute to the case study. Yin (2009) refers to this strategy as “embedded multiple case study” (p. 50) and is one that is employed in this research project, as it enables a larger case (‘Waiheke Island wineries’) to be made from multiple smaller cases (individual winery operators and visitors to diverse wineries).

Qualitative methods of research require information to be obtained from the relevant participants, from a small sample on a specific topic in great depth. It is interested in the detail, context and subtle differences of the subject being investigated.

Although Waiheke Islands' contribution to the New Zealand wine industry is small at around one per cent, there is widespread recognition that some excellent wine is produced on the island (Picard, 2005). With the exception of one vineyard, the majority of wineries produce less than 1,000 cases annually, a consequence of which is that Waiheke wines tend to demand a higher selling price (Baragwanath & Lewis, 2014).

### **3.6.1 Case Sample**

Case study research can include both single and multiple cases. As Patton (2002) makes clear:

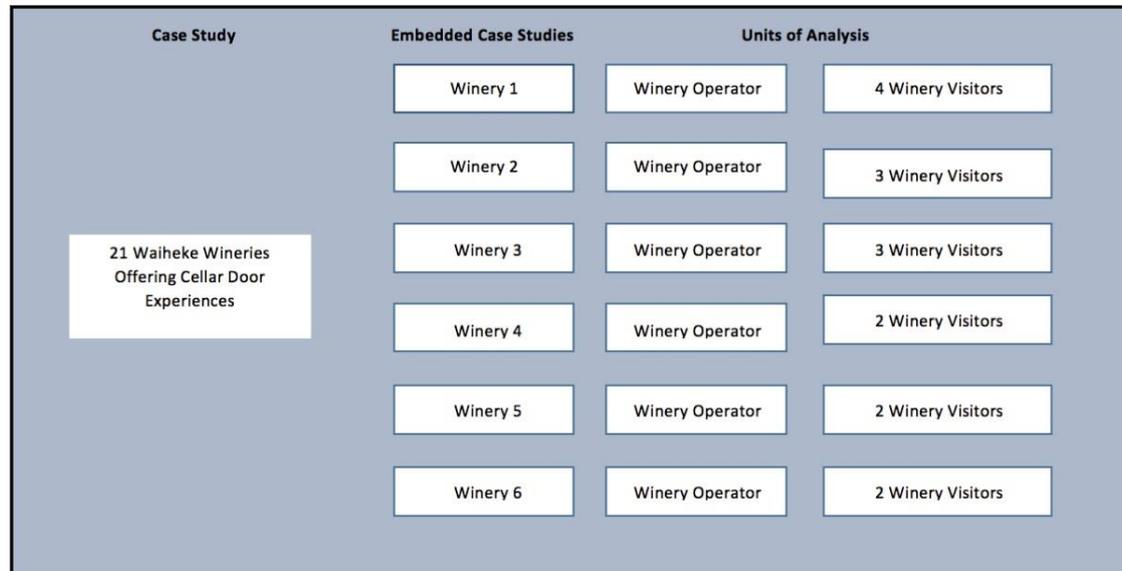
Cases can be individuals, groups, neighbourhoods, programmes, organisations or cultures... [They] can also be critical incidents, stages in the life of a person or programme, or anything that can be defined as a specific, unique, bounded system. Cases are units of analysis (p. 447).

The sample chosen for this study is representative of the winery operators on the island of Waiheke, New Zealand, and the subsequent visitors to those wineries. A multiple case embedded design was constructed and interviews were conducted in six of the wineries that accepted the invitation to be involved in the research project, and a further 16 visitor participants at these wineries. Multiple case embedded design is employed when the same study contains more than one case (in this case six wineries on Waiheke Island) and therefore has a distinct advantage over a single case design in that the evidence is often considered more compelling and, as Herriott and Firestone (1983), suggest provides a more robust study overall.

### **3.6.2 Sampling Process**

In September 2012, 21 out of 23 wineries in operation at the time of the research commencing were formally invited to become involved in this research project. (Two of the wineries did not offer a cellar door/tasting room facility). A formal letter of invitation was sent out to the individual wineries, outlining the purpose and intent of the research project (see Appendix B). Subsequent to the letter of invitation to participate being sent to the wineries, each winery was then contacted two weeks later by telephone to confirm that they had received the letter, and furthermore to establish their

willingness to be included in the research project. The result of this telephone conversation was that six of the wineries agreed to partake in the research project. In order to maintain confidentiality, the details of each winery are not disclosed throughout the project.



**Figure 3.** Multiple case embedded design and units of analysis at Waiheke wineries

Each of the participating wineries then became an “embedded case study” made up of the winery operator, and visitors to that particular winery, who represent “units of analysis” (Yin, 2009, p. 31) (see Figure 3). The units of analysis are consistent with the purpose of the research, which was to determine how winery operators interact with their visitors to co-create hospitality experiences. Six individual winery operators were interviewed initially in December 2012 (see Table 2).

**Table 2.** Winery operators’ demographic information

Pseudonym	Role	Gender	Age	Years in current position
Gerald	Cellar Door Manager	M	45–60	6–10
Diane	Proprietor	F	45–60	1–5
Stephen	General Manager	M	30–45	1–5
Sarah	Winery Manager	F	30–45	1–5
Jeanette	Proprietor	F	45–60	6–10
Sam	Proprietor	F	45–60	1–5

Four of the interviews conducted were with female winery operators who were either the proprietor of the winery, or a winery manager with regular involvement in the

effective running of the cellar door operation at the winery. Two males were interviewed, both holding management responsibilities within the operation.

A further 16 interviews were conducted with visitors at the six wineries throughout January 2013. Prior to each interview taking place, a letter introducing the researcher to the participants was presented, along with a consent sheet informing participants that participation was voluntary, and all details would remain confidential (see Appendix D).

**Table 3.** Winery visitors' demographic profile

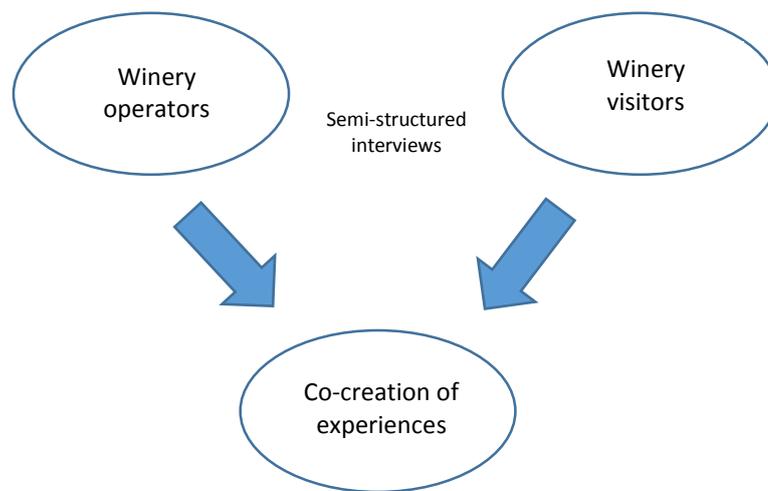
Pseudonym	Gender	Age	Nationality	Previous visit to winery?
David	M	25–30	New Zealand	No
Grant	M	45–50	British	Yes
Julie & Robert	F & M	35–40	German	Yes
Daphne	F	50+	Australian	Yes
Annabel	F	30–35	New Zealand	Yes
Maureen	F	50+	British	Yes
Douglas	M	50+	British	Yes
Alfred	M	50+	Canadian	Yes
Scott	M	25–30	New Zealand	No
Susannah	F	25–30	Australian	Yes
Rosie	F	25–30	New Zealand	Yes
Steve	M	40–45	New Zealand	Yes
Cassandra	F	30–35	Norwegian	No
Gerrard	M	40–45	New Zealand	Yes
Arno	M	40–45	Australian	Yes
Belinda	F	40–45	New Zealand	Yes

Sixteen participant interviews were conducted, of which one involved a discussion with a married couple. The remaining 15 interviews consisting of seven female participants, and eight were male. Only three participants had never visited a winery cellar door prior to this visit to a winery on Waiheke Island, and nine of the interviews conducted were with international visitors to New Zealand (Table 3).

### 3.6.3 Semi-structured Interviews

The use of semi-structured interviews as a data collection method begins with an assumption that tourism stakeholders' perspectives are important, helpful, and produce rich detailed data for analysis (Frechtling & Sharp, 1997). McGehee (2012) also pronounces that they have an established history in tourism research. Semi-structured

interviews allow for more capacity to elaborate during general discussion, rather than a respondent having to reply to a set of fixed questions requiring limited responses. Semi-structured interviews can be repeated for each person so that any responses can be compared, and although all interviews begin with the same question, the sequence and wording of subsequent questions is determined by the way in which the conversation develops. This approach to questioning not only provides a systematic approach, but also increases the breadth and richness of the data (Patton, 2002). A methodological framework for the conducting of semi-structured interviews has been presented in Figure 4.



**Figure 4.** Semi-structured interviews – A methodological framework

I conducted all the interviews, and all were held in the winery settings, at a conducive and convenient time for all involved. Each interview with the winery operators lasted between 45 and 60 minutes. Interviews with winery visitors generally lasted between 20 and 30 minutes, and were conducted after they had visited the winery tasting room. A copy of the interview questions for both the winery operators and the winery visitors can be found in Appendix A.

### **3.6.4 Field Observations**

Field observations were carried out during each visit to a winery, and complemented the case study research as they helped to capture participants' feelings and interactions. Information such as weather conditions, time of day, duration of visit, and numbers of visitors to the wineries during the interview period were recorded, as well as any other relevant observations. Notes were recorded immediately after the on-site visits to record these factors and settings. As Patton (2002) identified, field observations help

researchers to gain a holistic perspective by placing the study in context. The field notes were recorded in a notebook, and as Patton (2002) stated, “recording and tracking these analytical insights that occur during the data collection are part of fieldwork and the beginning of qualitative analysis” (p. 436). As the analysis progressed, it became clear to me that these notes led to increased insight, and began to provide more depth and richness to the understanding of participants’ responses and meanings.

### **3.6.5 Pre-test**

Prior to the research being carried out in the field, a pre-test of research questions was conducted to help refine the data collection processes with respect to both the content of the data and the procedures to be followed (Yin, 2009). The pre-test was conducted on a colleague who had recently visited a winery on the island of Waiheke and had engaged in a wine tasting session. Feedback was obtained on the interview questions, which consequently recognised that some minor alterations were required to some of the questions. Furthermore, on the recommendation of this colleague, the following question was added to the interview: *Tell me about how your view on visiting wineries may have changed since visiting this winery today?*

The pre-test also provided an opportunity to become familiar with data recording techniques, in particular the use of an electronic voice recording device. The use of this device produced two findings. Firstly, it was found that during the interview the researcher appeared somewhat distracted by the voice recording tool, and would often appear unfocused on the participant, and rather more interested in the workings of the device. This became somewhat distracting to the participant engaged in the interview. Secondly, it was discovered that there was considerable background interference from the recording device, which allowed for the researcher to become more familiar with the settings and more sophisticated features of the device, in order to reduce this interference prior to entering the research field.

### **3.7 Data Analysis**

Once the data collection process has commenced and begins to play a decisive part in any study’s achievement, data analysis is also a key factor in its success. According to Strauss and Corbin (1998), analysis is the interplay between researchers and data.

Furthermore, one of the initial priorities in qualitative data analysis is data reduction: a process which involves selecting, focusing, simplifying, abstracting and transforming

the data that appears in transcriptions and written field notes (Miles & Huberman, 1994).

The six winery operator interviews were transcribed by a professional transcriber and I transcribed the subsequent 16 winery visitor interviews, through listening to the interviews and using transcription software to type up the conversations. This allowed deep study of the data to begin to acquire nuances of the participants' language and meanings (Charmaz, 2006). The transcripts were subsequently coded and examined using a grounded theory approach. Much discussion surrounds the number of levels to which coding should apply within a grounded theory approach. Bryman (2001) identifies three types of coding, namely: open, axial, and selective or focused coding, which are parallel to the three levels of coding that Charmaz (2006), and Howley and Westering (2008) also denote, but named as Initial, Focused, and Theoretical coding.

### **3.7.1 Initial Coding**

The openness of initial coding allows researchers to provoke thought and allow ideas to emerge. Earlier grounded theory rules prescribed conducting initial coding without having preconceived ideas in mind (Glaser, 1992), to thereby look at the data from every possible angle in order to identify what they mean. Initial coding attempts to prompt the researcher to identify gaps or holes in the data which consequently become part of the analytical process. This involved line by line analysis of the data allowing the researcher to group and label provisional codes.

Initial coding is provisional, its aim is to identify the problem which participants seek to resolve. Through careful word by word, line by line coding, this will enable the researcher to fulfil two criteria fundamental to a grounded theory analysis: fit and relevance (Charmaz, 2006). This initial coding process allows for codes to be formulated which capture and convey meanings, revealed through rigorous analysis of and comparisons between individual parts of the data (Dey, 2004). Furthermore, Dey suggests that this initial coding process offers a method of generating ideas by close and detailed inspection of the data. "A creative process is therefore required from the researcher in being able to become confronted with the evidence, allowing it to invoke or provoke ideas without any particular preconception on the part of the analyst" (Dey, 2004, p. 85).

As a researcher with considerable previous experience in this field of study, the challenge was to carry out this process with awareness of my possible preconceptions and expectations, informed by my experience. Initial coding therefore allowed me to consider the data in a manner that may differ from research participants' analyses. Furthermore, initial coding allowed me to become detached from any preconceptions that may have been formed, and to understand how other people's actions complemented or conflicted with my own beliefs.

In addition to conducting interviews, I was reviewing literature relating to hospitality and co-creation and, after having read a considerable amount of literature, began to realise that certain codes were emerging from the data: i.e., friendliness of staff; product knowledge; levels of engagement. Glaser (1978) identified this process as theoretical sensitivity, by drawing on extensive literature broader than the field of study, thereby providing the necessary inspiration. However, there were several instances where it was still proving difficult to categorise some data. This consequently led to the next stage of analysis.

### **3.7.2 Focused Coding**

Focused coding is the second stage of the data analysis process, and involves refining and focusing the research on the data that are relevant to the provisional codes identified in the initial coding stage. Focused coding allows the researcher to scrutinise the most significant or frequent earlier codes. Primarily, the initial transcripts with the winery operators were analysed, and the codes were paralleled for relationships, similarities and differences. As I became familiar with the questions that had arisen out of the winery operator data, this allowed me to explore these more at subsequent interviews with the winery visitors.

For example, from the initial interviews with the winery operators, it became clear that they each felt their own winery had a uniqueness and individualism about it, which they believed contributed to the overall experience visitors remembered. They felt that product knowledge and brand awareness from their personnel also encouraged confidence and engagement with winery visitors. These were important ideas to then also explore with winery visitors, as to whether the visitors valued similar aspects.

This process identified five themes which made the most analytic sense to categorise incisively and completely (Charmaz, 2006). As a result, these five themes led me to a

proposed grounded theory founded on three overarching themes, namely Environment, Engagement, and Experience, which this research suggests contribute to the co-creation of hospitality experiences (see Figure 5, p. 50 for an illustration of this coding process).

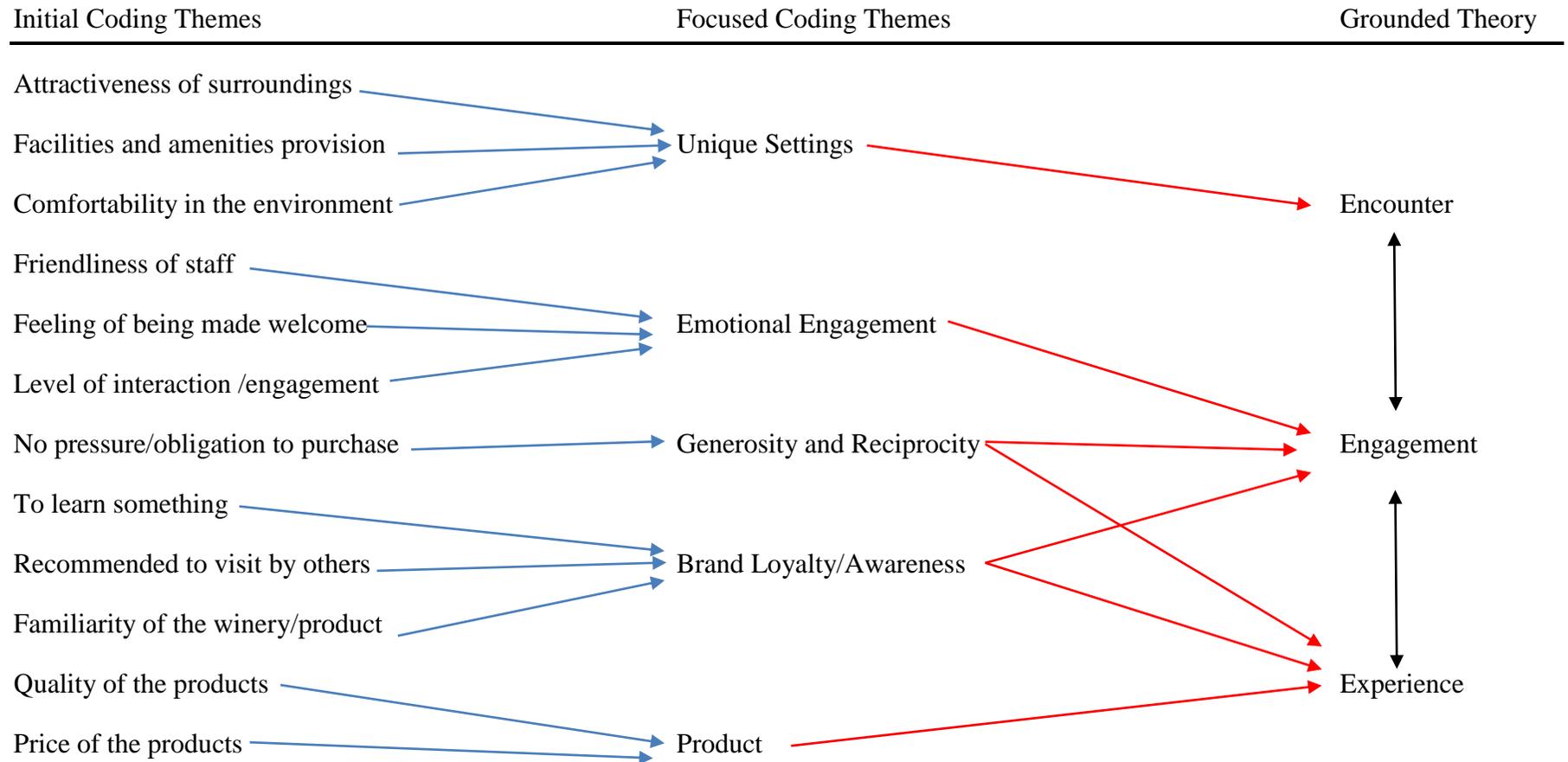
This further analysis and comparison became the inductive stage of research, where generalisations are produced through analysing a series of cases (Dey, 2004). Only the most prominent concepts and those most relevant to the data were concentrated upon. As a consequence, some codes were discarded and not further explored.

To selectively code for a core variable, then, means that the analyst delimits his coding to only those variables that relate to the core variable in sufficiently significant ways to be used in a parsimonious theory. The core variable becomes a guide to further data collection and theoretical sampling. (Glaser, 1978, p. 61)

Braun and Clarke (2006) suggest that during the stage of selective coding, researchers must be conscious that it is possible for a mismatch to occur between the data and the analysis. Conscious of this observation, the data were carefully analysed again and again for consistency. I undertook this process manually and it involved a laborious process of interpreting data onto cards that could be duplicated and organised under different themes. Consequently, all aspects of a particular idea could be consolidated in one place, in order to enhance the analysis and identify similarities and differences (Dey, 2004). As a result, data could be compared under those themes in order to make connections between them.

### **3.7.3 Theoretical Coding**

The third stage of the data analysis, theoretical coding was where the theory on co-creation of hospitality experiences was conceptualised, thereby formulating a grounded theoretical concept pertaining to three factors, namely: Environment, Engagement, and Experience. I analysed the relationships between the categories and their properties to explain the process of co-creation. At this stage in the research project, a theoretical model was beginning to emerge, which underpinned the theory beginning to evolve. It was during this stage of the analysis that theoretical saturation was reached, as sufficient data had been analysed, a comprehensive understanding of co-creation was achieved and no new categories emerged (Charmaz, 2006).



**Figure 5.** Data analysis and coding themes

### **3.8 Ethical Considerations**

This study was independently reviewed by the Auckland University of Technology Ethics Committee (AUTECH). As all research involving human participants carries potential risks, approval from AUTECH was necessary and was obtained in October 2012. In a relatively small case-study population, and due to the nature of the case study, care was taken to ensure that all participants were of the legal age of consent for consuming alcohol in New Zealand. To minimise any risk, all participants and establishments remained anonymous, and were exposed to neither humiliation, fatigue nor discomfort. Participants were fully briefed on the nature of this research, and were presented with consent and participant information sheets prior to any research being conducted. During the period of field research, no ethical issues arose with any of the participants.

#### **3.8.1 Participant Information Sheet**

A participant information sheet was provided to all participants prior to the interview (Appendix C). The information sheet was designed to provide participants with a background to the study, and the intended purpose of the research. It was made apparent to all participants that engagement was voluntary, and complimentary soft drinks were offered to participants as recognition for their time. The research supervisors' and AUTECH contact details were provided on the information sheet, should the participants have any concerns about the research being undertaken.

#### **3.8.2 Data Storage**

A database containing all forms of data used in the study has been designed to contain records of data such as dates of interviews, locations, and demographics in terms of age, gender and nationality, which were gathered. All transcriptions, interview notes, and digital recordings were stored in a secure office, in a locked steel filing cabinet.

### **3.9 Research Reflexivity**

Part of the method of any qualitative enquiry should involve some form of reflection on the process of one's research in an attempt to understand how one's own values and opinions may influence findings, and yet add reliability and integrity to the research (Jootun, McGhee, & Marland, 2009). In being reflexive throughout this research project, I have attempted to enter the field with sensitivity to the empirical evidence of the research data, endeavouring to have a disposition of discovering ideas in that data

without imposing preconceptions (Dey, 2004). I have also been conscious of the fact that my own breadth of experience and interest in the wine tourism industry may have had cause to exert a degree of influence either intentionally or unintentionally on the findings. One of the methodological concerns that frequently emerge in this type of study is the degree to which the researcher can become personally involved in the research process and still remain objective in the whole process (Jootun et al., 2009).

Hertz (1997) indicated that reflexivity requires the researcher to enter the research process by ignoring any preconceived ideas about the subject matter. The role should therefore be to prompt, probe and encourage participants' views of their experiences. In my particular instance, this involved putting aside my personal beliefs, in an attempt not to make any judgements about what I heard in any of the conversations that I had with participants, which could have ultimately meant misinterpretation of the phenomenon being described. This is a process that Speziale and Carpenter (2007) refer to as *bracketing* and is a method that can be used to separate personal views and preconceptions from the phenomenon under study.

For the purpose of this study, I adopted a qualitative interpretive approach, which naturally led me collect data using semi-structured interviews. Initially I was concerned with the challenge of which wineries to choose for the study, however after writing to all of the wineries on the island of Waiheke and receiving agreed participation from six of the wineries, I felt that it would be appropriate to include each of them in this research project. Once the wineries had agreed to become involved in the research, my next challenge was co-ordinating and consolidating agreed times during which the interviews could be carried out. It was therefore my intention to identify a five day period, during which I could base myself on the island and immerse myself in the research field, meeting with each of the six winery operators to conduct the semi-structured interviews. This was achieved during the month of December 2012, and it was during this period of time that I began to realise, as each interview had been completed, that I had the opportunity to reflect on each interview afterwards and slightly refine the questions for subsequent interviews, based on the findings I had heard. As a result, I noticed as the week progressed the data was becoming richer, and themes were beginning to emerge. I also noticed that my confidence and articulation in conducting interviews also increased during this week.

Another dilemma I faced during the planning of this research was how I would attract winery visitors' attention to be interviewed. Initially I thought that I would perhaps arrange to engage with visitors initially whilst at the winery, and then establish whether they would be willing to become involved in a semi-structured interview at another opportunity more convenient to them, perhaps in a local café, or some other public place. I realised this might not be ideal, as many visitors might only be on Waiheke Island for short periods of time. Ultimately, therefore, I decided to position myself in the vicinity of the cellar door (with the agreement of the winery operator) and had prominent branded signage to inform visitors that I was a researcher who would welcome 15–20 minutes of any willing participants' time. I also provided a collapsible table with chairs, and chilled soft beverages for participants' comfort. Initially finding participants proved to be quite challenging, as many participants would notice my presence at the vineyard, but not actually engage in any form of contact with me. As a result, I found myself becoming much more extrovert at the wineries, in terms of greeting visitors as they approached or left the vineyard, asking them about how their visit had been. On subsequent visits to the vineyards, I would always make the cellar door staff aware of my presence, which later also became an opportunity for them to promote my research to their visitors, which assisted greatly.

By placing myself in the winery grounds at the research site, it enabled me to enter into the lives of both the winery operators and the visitors, which is in accordance with the constructivist grounded theory methodology adopted for this study (Charmaz, 2002). During my time in the field, I kept a comprehensive diary of notes based on my field observations on that particular day. This included observations on the size of groups, demographic make-up of the visitors interviewed, weather conditions, time of day, and any other anecdotal details. Furthermore, these observations and anecdotal notes allowed me to record my analytical progress and identify where I might need to strengthen my core themes.

### **3.10 Limitations of the Study**

Since research on the island of Waiheke in relation to wine tourism is relatively new, there were limitations pertinent to this study. A series of limitations are listed below.

There is a limitation because of the timeline of this study, as the field research was carried out during the months of December and January, which is notably the beginning of the wine tourism season, and the lead-up to the crucial harvest period for wine

producers in New Zealand. As a result, some winery operators declined the opportunity to become involved in the research project due to business demands.

There may be a limitation in selecting participants for the study. The study only selected participants visiting wineries on the weekend (predominantly Saturday and Sunday). Furthermore, participants had to be English speaking, and commit approximately 15–20 minutes of their time to a semi-structured interview.

There was a limitation on getting wineries to participate, because it was approaching their busiest time of the year. Some wineries did not offer a cellar door experience, whilst others felt that the study would not benefit their winery.

Finally, the results of this study should be interpreted with some caution as there were challenges in attaining similar sample sizes from the six wineries used within the study, which could represent difficulties in making some general assumptions. For example, two interviews were conducted at one of the wineries, compared to four interviews conducted at other wineries in the study.

### **3.11 Conclusion**

The chapter has outlined the methods of grounded theory methodology from a qualitative constructivist paradigm, and explained how these methods were applied in this research project. This chapter began with an explanation of the interpretive qualitative research paradigm that informed my work, before addressing the key components of grounded theory method and providing an overview of how coding themes from semi-structured interviews were collected and analysed. The purpose of this chapter was to describe in detail the research process undertaken, in order to assist the research to be placed into a context that allows the reader to comprehend the subsequent chapters. The use of qualitative, case study research may restrict the ability to generalise the study to other locations; however, a conscientious effort has been made to gain a deep understanding of the issues around the co-creation of hospitality experiences at the wineries in this study that may well be highly relevant to many other settings. Chapters 4 and 5 present the organisational context of the data as they relate to both the winery operators and the winery visitors. These findings correspond with the five focused themes that have been identified as part of the grounded theory, and will ultimately contribute to the theoretical model developed from this research.

Chapter 4

**Analysis of Findings (Winery Operators)**



Little Oneroa township

## **Analysis of Findings – (Winery Operators)**

### **4.1 Introduction**

This chapter presents the findings from the interview transcripts of the winery operators. The purpose of discussing the findings of winery operators prior to those from the winery visitors' data follows the sequence in which the interviews were conducted. The chapter presents the profiles of the winery operators and endeavours to provide some concepts around the design of the semi-structured interviews, identified in the literature review. An in-depth process of coding and consideration occurred following the transcription of the interviews. The process of initial coding was used to identify themes that emerged from both the interviews of the operators and the visitors. Twelve themes were identified through the first stage of the coding process, as identified in Chapter 3.

Further to this, focused coding allowed me to identify five themes that were categorised, namely (i) unique settings, (ii) emotional engagement, (iii) generosity and reciprocity, (iv) brand loyalty/awareness, and (v) product. These five themes have subsequently been elaborated and are further presented in a proposed theoretical model directly in relation to the aim of this research, which was to investigate how winery operators deal with the heterogeneous demands of their visitors to co-create hospitality experiences at the cellar door.

### **4.2 Respondent Profiles and Opinions**

This section introduces the respondents' profiles, from the winery operators' perspectives, followed by the winery visitor profiles in the next chapter. The findings from the interview questions are presented commencing with the six winery operators on their views of the experience that visitors receive when visiting their winery. Chapter 5 will then identify the views of the 16 winery visitors on their recent visit to the winery cellar door.

#### **4.2.1 Winery Operators' Profiles**

As presented in Table 2 in Chapter 3 (p. 43), six winery operators were interviewed, all of whom had regular involvement in the day to day operations of the winery cellar door environments. With the exception of one, all other winery operators were New Zealand descendants, and all of the operators were over the age of 30 years. Between the six

winery operators they had over 25 years' experience in the wine industry. Pseudonyms for all winery operators have been used throughout the research, where individual comments have been included.

### 4.3 Unique Settings

There is a partially aesthetic dimension to wine consumption, as Charters and Pettigrew (2005) identified in earlier literature. When the winery operators were asked about the reasons they thought visitors were visiting their specific winery, three core themes were identified.

#### 1) The attractiveness of the vineyard and the natural surroundings

Winery operators commented on the atmosphere that surrounded them, in terms of how they believed the natural landscape engrossed their visitors, and the appeal of the 'terroir'. To wine enthusiasts, the 'terroir' is viewed as the alchemy of vines, soil, climate, and the winemaker him- or herself mysteriously combining the results of which are excellent wine (Howland, 2014). The scenery that visitors could see provided them with a unique experience, and possibly something a little extraordinary to their expectations. Providing unexpected services and facilities also led operators to believe that their wineries presented a distinctive character.

In terms of winery operators' initial thoughts on why visitors chose to visit the winery, they mentioned their point of difference from other wineries on the island of Waiheke, which can include ways in which some of their visitors can arrive at their vineyard, by modes of transport other than car.

*Yeah, but I think as far as [name of winery] is concerned, for everyone to come down here and it's more of a relaxed atmosphere, everyone just loves sitting around on the deck looking out to sea, some people come by means other than car, that's what makes us a little different –do you know what I mean? (Jeanette)*

Others believed that the natural and rural settings add to the beauty of their surroundings. Rustic native settings distinguished them as being in a place of distinctive beauty and authenticity.

*Well it's very rustic here, obviously, it's I mean this vineyard, this summer weather makes it gorgeous the lovely gulley we sit in with the lovely vines perched on top of the hill, and we could actually be up there overlooking beautiful views to Onetangi beach. But we've chosen to be down here amongst the vines so that it's obviously very rustic sort of native environment. (Dianne)*

Operators described the terroir of their surroundings with outstanding viewpoints, which suggested privileges that winery operators had to offer at their vineyards.

*We're blessed, we've got a stunning viewpoint, there's a trig station at the top of the hill and you walk through the vineyard to get there, so we're quite happy, it's ten to fifteen minutes to get there, so we're quite happy. (Gerald)*

The belief that travelling to Waiheke Island in itself provided a unique experience for visitors, in terms of the expense to which they have already disbursed on ferry crossings, led some winery operators to believe that they have a duty to provide a feeling of value to their overall trip. The quality of the product and services on offer contribute to this overall perceived value for money.

*Waiheke's unique, I mean if you are coming here to [name of winery] you've already spent over a hundred dollars to get here, and so it is important that we can encapsulate that feeling of value by immersing you in this luscious setting overlooking some of our vines that produce some of the finest wines in the world. (Stephen)*

Added value in terms of other provisions included other recreational activities introduced by one vineyard, to add another dimension to the wine tasting experience – and to contribute to the overall appreciation and immersion of the wine tasting experience.

*The other thing that we are presently developing is a walking track which [name of partner] has created through the valley, to be able to offer them a walking experience through the terroir, which will I think increase their appreciation of the wine experience. (Sam)*

It was evident that the winery operators believe Waiheke Island offers visitors a distinctive experience in terms of the natural attractiveness that the area has to offer, and in some cases winery operators utilise this natural offering to enhance their winery experience.

## 2) The facilities and amenities that were provided

Although winery operators believed their wineries had a point of difference, there was also recognition that some of the facilities could be further improved. Many of the operators believed that first impressions their visitors had of their buildings, upon arrival, and the entrance to the wineries, contributed to the notable impression that would be left with their guests following their departure. Some operators also

recognised the limited provision that they presently offered at their establishments, which may lead visitors to make comparisons, and recollect experiences at other wineries that they had visited. These factors included primitive access, and limited facilities.

*When you arrive with your partner at the top of our stairs, you have to appreciate that they have made a conscious effort to be here, they may have seen photographs of our great doors on the net, and they have probably read about us as well. So if you've lost them at the top of our stairs, chances are you have also lost a sale. (Stephen)*

The heritage of the vineyard, and the buildings contained within it, provided not only beauty and attractiveness, but also a feeling of hospitality and genuineness to visitors that they were welcome to view the winery facilities at leisure.

*Being one of the oldest vineyards on the island we have a beautiful property that you're welcome to wander around, we've got a massive dining room and yeah we hold private functions, weddings and special events. (Sarah)*

Others recognised that their premises were wonderful buildings which may suggest opulence to visitors on first impression. Further encouragement to explore the areas, and recognition of the quality of service provision, further made visitors feel welcome by allowing them the freedom to view the facilities.

*It's a very exquisite looking building, as you can see, probably a little intimidating to newcomers on first arrival?, but there's nowhere out of bounds except the kitchen of course – and our chef is award winning, which of course makes the dining room experience quite unique. (Gerald)*

The lack of amenities and service provision was also recognised by some operators as once again providing a dissimilar experience to what visitors may have experienced previously, and yet limited access and indoor tasting areas still provided a different experience for visitors. These differences included less ornate facilities, and perhaps more rustic or natural environments for visitors to experience.

*Yeah – one of the things we need to do is expand and create a greater indoor area, because it is quite limited here on a cold day, it can be challenging. We do tastings inside but, yeah we do definitely need to consider expanding, yeah facilities a little bit so they're a bit more comfortable. (Dianne)*

In some instances, the lack of facilities, such as primitive access to the winery, suggested that the operator almost had a desire for it to remain in such a condition, so as to contribute to that memorable journey to the winery. The location of the vineyard, and the journey to the vineyard, can contribute to the overall experience.

*I know the road's unsealed, but hey isn't that part of the whole experience of visiting [name of vineyard]. They'll remember their journey here eh? (Jeanette)*

Winery operators thereby recognised the services that their individual establishments have to offer their visitors, and in some cases were aware that although these may be primitive in some instances, they felt they still had reason to believe that their offerings added to the overall winery experience.

### 3) Feeling comfortable in the environment

A feeling of welcome was what operators hoped that their visitors would sense once they had arrived at their wineries, providing a relaxing environment in which they could spend unlimited periods of time for their own recreation and pleasure. Operators also recognised that the primary reason for being at their winery was not necessarily to taste wine, and perhaps that they may be in their grounds for other leisure activities. Welcoming families to the vineyard was also encouraged with designated areas for children to play.

*Some of our visitors spend the day here, they'll bring a picnic, or even buy a picnic hamper from us, as you can see there's lots of space for them to relax, hang around, and children can play over there. (Sarah)*

Other recreational activities, such as walking in the surrounding areas, and use of the surrounding beach areas, portrayed a 'no obligation to try' feeling by visitors, as well as a sense of no pressure to make a purchase whilst at the vineyards. The vineyard thereby provided a setting for recreational activities other than tasting wine.

*They're here to enjoy the occasion, use the beach, walk in the bush, and hopefully buy some wine!! (laughs) (Jeanette)*

*Many of our guests, have heard about our wines, and so we create a non-threatening environment for them, no pressure to buy, walk around and see what our guys do. (Stephen)*

Wine tasting is not always the primary reason for visiting a vineyard on the island of Waiheke, and winery operators accepted that in some cases the wine tasting experience may be secondary to visitors' initial intention for being in a particular area.

#### **4.4 Emotional Engagement**

The engagement with the staff at the winery is crucial, and staff must have the ability to enable visitors to connect with the winery (Charters, Fountain, et al., 2008). Three initial codes contributed to this emergent theme.

##### 1) Friendliness of staff

Operators felt that it was important for their staff to behave in a way that was not hostile in any way, and therefore inclined to befriend a feeling of friendship to their visitors, empathy and helpful in their actions. They aimed to 'put smiles on faces', and enjoy their experience at the winery. A smile suggests that visitors are engaged with staff, and therefore comfortable with the care that they are being provided.

*We want to put a smile on their faces, and make sure of course that they leave us with a smile. All our staff have training in customer care. (Sam)*

Staff are encouraged to make friends, which many of them appear to do in a genuine way, which may then encourage repeated visits to the winery. Feelings of friendship imply that connections are being made between visitors and winery staff.

*I tell all our staff that it's about making friends that you hope to see again. (Dianne)*

Locality and familiarity with the area appeared to be of significance and may suggest that this adds to the engagement visitors emotionally experience about their visit. Recognising inhibitions of some visitors who may feel inexperienced or unfamiliar with such experiences are strategies that staff use to overcome and help facilitate a sense of comfort during their winery visit. Winery operators therefore recognised that wineries can be intimidating territories to less experienced visitors, and therefore aimed to put them at ease, with a sense of comfort and engagement.

*Staff recognise inhibitions of our visitors, it's all about engaging with them, you know, empathy, putting them into a space they are comfortable with. Our staff are all local and talk about the island – and their visits, tasting wine is almost an afterthought. (Stephen)*

Winery staff are given training at some wineries in how to make their visitors feel welcome at the winery. Winery operators believed, therefore, that a welcoming attitude and friendly manner were key to making visitors comfortable in the winery surroundings.

## 2) Feelings of being made welcome

The essence of ‘hospitableness’ and making visitors feel welcome and providing some initial offering of food or wine was apparent amongst all operators. Once again ‘making friends’ was commented on and some storytelling, referred to as ‘infotainment’, implied that visitors are quickly put at ease, and begin to regard themselves amongst friends.

This implied a sense of connection again between the host and the guest.

*It's that old chestnut about being hospitable isn't it? – hospitality eh, what does that mean, well as I said they're all old friends, a little 'infotainment' is what I am going to give them. Some wine to drink, some information about the wine, and a few stories about my fifteen or so years in the wine industry. I treat them all as long lost friends! (Gerald)*

An assumption here is that they are expecting to taste some wine and food with the compliments of the host. The host thereby offered unexpected treats upon arrival, endeavouring to welcome them to their establishment.

*First we offer them a taste of our [name of house aperitif] with our compliments, and then we find out whether they are here to eat, or just to taste some wine, well it's going to be one or the other (or both) isn't it? (Sam)*

Once more the companionable, neighbourly, and kindly manner is endeavoured to overcome feelings of intimidating and condescending manners. Assumptions on visitors’ prior knowledge and experience of wine is not considered to be of relevance, and operators therefore do not make preconceived assumptions of their guests.

*Again it's about that non condescending approach – try to read them, we have no idea who they are, never assume they know nothing, but also don't forget they may know a great deal more than you! (Stephen)*

There is also a feeling that relates to Hemmington’s (2007) behaviour–experience model in which the dimension of ‘lots of little surprises’ creates a unique experience for visitors and also something that they will remember.

*The least that we can do is make them feel comfortable, they are here to enjoy themselves, and hopefully try some delicious wine, if we can provide them with some unexpected surprises like [name of member of staff] rich chocolate cake with our merlot then it is something they will remember – don't you think?*  
(Dianne)

Elements of surprise and unexpected treats were believed by winery operators to ease visitors into the surroundings, which thereby strengthened the feeling of hospitableness extended by the winery staff.

### 3) Level of interaction/engagement

Staff recognised that they have allocated positions and service duties in terms of the roles that they play at the cellar door, which thereby facilitated the 'staging' and engagement of the experience that Gibbs and Ritchie (2010) suggest. Staff were all trained in the products offered at the winery and therefore had a great deal of knowledge about the winery and its offerings. Levels of engagement between operators and visitors were pitched in a manner that attempted to create an encounter which does not intimidate visitors. This was done by using key lines of subtle enquiry to find out a little more about the visitors, including a tactic that was referred to as 'working the floor'.

*Our staff are taught to 'work the floor' – by that I mean that they can quickly read the visitor in terms of their level of interest and expertise in wine knowledge. This is then where they pitch that level of engagement with them, don't intimidate them, and certainly never assume that they know more about wine than them!* (Stephen)

The paradigm of theatre and performance is also recognised by operators in terms of the part visitors play, as human actors in the part of service delivery (Morgan, Lugosi, & Ritchie, 2010). Visitors were encouraged to participate in the 'performance' of the wine tasting, as they converse with winery staff and other visitors, with personal thoughts and reflections on their own experiences.

*You can tell the wine buffs (laughs) you can also tell the wannabe winebuffs – but it's not about that, as I mentioned it's that 'infotainment' – there's always going to be something they don't know about our wines. If you see a smile on their face, or a nodding head you know they've tuned in to what you are telling them* (Gerald)

Winery operators also concurred with the findings of Fountain, Fish and Charters (2008) in the need to establish an emotional connection between the winery, its product

and staff. Staff were once again proficient, allowing them to find out a little more about their visitors and build a relationship with them and put them in a comfortable disposition.

*Some of our visitors clearly want to know more about us, and our wines, and therefore it is important to recognise levels of interest and be in a position to put them at ease, in a non-threatening or intimidating manner. (Jeanette)*

Winery staff acknowledged that they all have a part to play in the wine tasting experience, and in some instances have the ability to behave in a manner that appears non-threatening, non-patronising or not in any way intimidating to their visitors. They also aimed to be able to provide appropriate levels of information to suit the interests of individual visitors.

#### **4.5 Generosity and Reciprocity**

Gilmore and Pine (2002) recognise that “no company truly sells an experience unless it charges its guests an admission fee” (p. 89). In the case of wineries, there are some differing opinions from a winery operator’s perspective as to whether one should charge a fee for tasting. An assumption is made that any visitation to a winery is beneficial to a winery, but unsurprisingly with this service come additional financial costs (Charters, Fountain, et al., 2008). Only one of the wineries included in this study actually charged a tasting fee at their winery, and yet all winery operators concurred with Kolyesnikova, Dodd and Laverie’s (2007) findings that they believed an indication visitors felt appreciative, and involved with the wine and other educational assistance given to them on their visit, would result in the purchase of some wine.

*No we don’t enforce a tasting charge, and we let them taste everything that you can see listed there on the blackboard. Of course some visitors will taste two or three wines – seldom will anybody try and work their way through the whole list. Most people will leave us having made a purchase of something they have tried that day. (Jeanette)*

A nominal charge was made by one of the wineries, which some operators believe is acceptable behaviour, and would be reimbursed should visitors make a subsequent purchase at their winery. A belief that this charge will not influence purchase intentions was also perceived.

*Yes there is a nominal fee to taste four of our wines, (which is actually the equivalent of a glass of wine!) however that charge is refunded should they*

*make a purchase – that's quite normal isn't it? I don't think this really has any effect on whether they buy anything though? and if they have enjoyed their time with us, they will buy a bottle to take home, wherever that may be. (Dianne)*

In contrast, some operators believed that if levels of engagement, service provision and facilities meet visitor expectations, then they have reason to believe this will determine a subsequent purchase from their winery.

*Absolutely not! – As I've said earlier chances are it's already cost them \$100 to get here, and there's certainly no pressure for them to purchase anything from us. I think that's because my staff, pitch their level of engagement at the guest having gauged that initial level of interest. If they've had a great time with us here at [name of vineyard] they're gonna buy something anyway, take it home and share with others! (Stephen)*

*We thought about incurring a tasting charge, and a branded glass to take away with them, but then we thought, well we are also a restaurant and if they see the food whilst tasting wine, they may stay with us anyway and eat something, or they may even come back on another occasion. (Sam)*

Although there were some mixed opinions from winery operators as to whether a tasting fee should be charged at their winery, most believed that it was more important that their visitors have a memorable, enjoyable experience with them, which will ultimately bring its rewards to the winery, which could have consequent longer term benefits in terms of brand loyalty and awareness.

#### **4.6 Brand Loyalty/Awareness**

One of the overarching questions all winery operators were asked about in the interviews was the reason they believed guests visited their particular vineyard. Three initial core themes were identified, namely (i) to learn something, (ii) on recommendation by others, and (iii) their familiarity with the product.

##### **1) To learn something**

Aside from the predominant driver motivations of wine tourists being to purchase and consume wine (Hall, Johnson, et al., 2000), the majority of operators recognised that visitors are seeking an educational informative experience, as also identified by Carmichael (2005). The reference to 'infotainment' by one winery operator suggests that this educational experience can be done in a relaxed more light-hearted manner and therefore creates lasting memories for visitors.

*That terrible word sums it up, infotainment – Most people they want some sort of information, and they want to be entertained. (Gerald)*

*We want them to remember that informative experience! (Sarah)*

Emotional engagement was once again referred to, and may complement that learning experience. This may suggest interaction not only between the operators, but also the natural surroundings and climatic conditions, often referred to by winemakers as the ‘terroir’, that magical enhancement of vine, soil, climate, and landscape.

*A quintessential wine tasting experience, to taste terroir, and understand a little bit about our philosophy, as well as the opportunity to engage emotionally. (Sam)*

Meeting the staff involved in the winemaking process was also considered by some of the winery operators to be important and the willingness to share their experiences with their visitors was also recognised as strengthening the educational experience gained.

*There’s also that bench (points) especially with my husband [name] whose phenomenal knowledge, wine knowledge is fabulous. He could spend two hours with a customer quite happy. (Dianne)*

Ultimately, many visitors to the wineries are hoping to learn something about the winemaking processes at a particular winery. Winery operators have the ability to provide differing levels of information, depending upon their visitors’ level of enquiry.

## 2) Recommended to visit by others

The operators believed that their marketing and promotional campaigns contributed to the success of their winery visits, and many of them proactively establish how their visitors were made aware of the winery.

*We actually ask our visitors how they found out about [name of winery] – this is really good for us because we can see how effective our marketing work is in terms of publicity material, word of mouth, internet... (Sarah)*

*A lot of the individual winery tour guides, are asked by their clients to bring them to us, because they have read about us through social media, information provided at the i-SITE in Oneroa you know. (Gerald)*

One operator suggested that the location of their winery on the island may be a reason for the success of their winery cellar door.

*Because of our location, we simply ask them how they heard about us [name of vineyard]. They have made some effort to come down here and visit us. (Dianne)*

Winery operators were conscious about their brand image and presence on the island and therefore continued to consider ways in which their marketing and promotional activity continued to be effective for them.

### 3) Familiarity with the winery/product

One of the advantages cellar door operators considered vital to their success was that it allowed opportunities for wineries to establish a link between brand association and themselves (Lockshin & Spawton, 2001).

*We do exports – our flagship vine [name] is predominantly sold overseas, naturally goes without saying visitors will want to come and see where our premier wine is made eh. (Stephen)*

It was not only the cellar door experience that contributed to the brand loyalty, but also the additional facilities that some wineries also provided that gave assurance of reinforcing the image and quality of the brand.

*We're a venue for some quite prestigious events, as well as an award winning restaurant, the wine completes that package and overall experience. (Gerald)*

The uniqueness and individuality of the product was also felt to be advantageous to the wineries.

*Our wines have won some prestigious awards, in recent years. Nobody else on the island has a [name of grape variety] yet at this stage – we're the only ones. (Dianne)*

Customer satisfaction can have an impact on post-purchase beliefs, and future purchase intentions, and customer loyalty was concurrent with Mitchell's (2006) findings.

*I mean we're in some very flash restaurants overseas, and known by a lot of people, our wines are pretty up there and if they're coming to New Zealand they always want to come here. (Jeanette)*

It is not necessarily solely the wine product that contributed to the success of the wineries. Brand association, and reputation of the winery services, were also important factors for continued success of the wineries on the island of Waiheke.

#### **4.7 The Product**

All of the winery operators believed that the wine product was integral to the winery visit. Two leading themes emerged from the discussions, which concerned: i) the quality of the product and ii) the price of the product.

##### **1) The quality of the product**

Naturally, all winery operators believed that they produced high quality premium wines, that displayed innovation, exquisite quality, and stunning characteristics, that perhaps were characteristics of Waiheke Island wines, consequently making them unique. Some of the comments made have been summarised below;

*'stunningly great wines' 'exquisite tasting experience' our wines are quite innovative 'we produce this amazing wine!' 'they're looking for delicious wine' 'don't just remember the beautiful wine, remember the time you spent with us!'*

Winery operators truly believed that wine from the island of Waiheke is exceptional, and also recognised that it is not just about offering visitors a glass of wine upon arrival at their establishments. They believed that the overall experience of arriving at the vineyard, becoming immersed in their surroundings, meeting the winery staff, and tasting the wine provided them with a unique experience offered to them.

##### **2) Price of the product**

Some justification was given to the cost of wine from Waiheke Island, which includes the location of the island in terms of distribution and consumable costs.

*Waiheke wine is not cheap – but think about our location, it's quite unique, we have our own micro-climate and terroir. This is what we tell our visitors, and I think they come to realise the uniqueness and individuality of Waiheke wines.*  
(Gerald)

Operators believed that the price of the product is not an issue, and that in fact visitors to the island are actually buying into a total experiential package. This will include a number of elements, namely their initial arrival at the winery, their connection with the staff, and their overall expectation of their involvements at the winery.

*It's not about the price I don't think, they are buying that whole experiential package – you know that we have talked about. (Dianne)*

To summarise, therefore, winery operators recognised that their wines are not generally regarded as relatively inexpensive wines, and can justify reasons for this in terms of their location. They recognised the individuality of their wines, and appreciate the patronage that visitors demonstrate upon visiting their wineries.

#### **4.8 Conclusion**

Recapitulating the findings from the winery operators reinforces the comment made above with regard to a 'whole experiential package' that they believe visitors are seeking. This includes their initial travel to the island, and how it contributes to the uniqueness and positioning of the island of Waiheke as a winemaking region. The facilities and individuality that each winery may have to offer its visitors can also reinforce the hospitableness of this encounter. Furthermore, the level of staff engagement and the degree of confidence that they can instil in their visitors, may contribute to reinforcement of brand loyalty and subsequent purchase of products from them.

This chapter has endeavoured to extract the five focused themes from the semi-structured interviews held with the six winery operators on the island of Waiheke. These five themes will now be applied to the findings of winery visitor statements, and analysed in the following chapter. A discussion of these findings will then be presented in Chapter 6.

Chapter 5

**Analysis of Findings (Winery Visitors)**



Pinot Gris grapes growing on Waiheke Island

## **Analysis of Findings – (Winery Visitors)**

### **5.1 Introduction**

This chapter will present the responses of the winery visitors from the questions that were addressed to them at the respective wineries that they visited during the time at which the field study was carried out. The chapter will present an overarching profile of the visitors, and will suggest some themes to support those themes identified in Chapter 4.

In the same manner that initial coding was used to identify the five emergent themes from the winery operators, that were (i) unique settings, (ii) emotional engagement, (iii) generosity, (iv) brand loyalty/awareness, and (v) product, the responses of these visitors will further support the proposal that these themes contribute to the co-creation of hospitality experiences between winery operators and their visitors.

### **5.2 Respondent Profiles and Opinions**

Sixteen visitor interviews were carried out between the six wineries included in this research project. Fifteen of the interviews were conducted on a one to one basis, with one additional interview comprising a married couple. The findings from the visitor interviews which focus on their winery visit experiences are presented below.

#### **5.2.1 Winery Visitor Profiles**

In Chapter 3, Table 3 (p. 44) presented a demographic profile of the visitors that were interviewed during the month of January 2013. As in the case of the winery operators and to ensure confidentiality of information disclosed by individuals, pseudonyms for winery visitors have been used throughout the research wherever individual comments have been recorded.

### **5.3 Unique Settings**

As in the previous chapter and through the methodological process adopted, the same three core themes have been identified as pertinent to this study.

1) The attractiveness of the vineyard and natural surroundings

Some visitors mentioned the ‘uniqueness’ of being on Waiheke Island which is likely attributed to the fact that it is an island and therefore requires a boat crossing of some form from the mainland (although one vineyard does have its own helipad). Evidently access to the island by whatever means contributed to this uniqueness, as well as the point that the wine region of Waiheke is contained upon an island.

*The ferry crossing is rather fun, and almost unique, as most vineyards in Australia tend to be in rural areas on the mainland. (Daphne)*

*I don't remember ever travelling to a vineyard by boat (laughs) I guess that's what makes Waiheke unique eh? (Douglas)*

Other visitors mentioned the intrigue of the boat journey, and attractiveness of the natural surroundings upon arrival. A first visit to the island, and the conditions that visitors are exposed to when making the crossing, also suggest that a feeling of ‘uncertainty’ may also contribute to the experiences they recollect. This uncertainty leads to a notion that coming from an urban environment, visitors are entering into unfamiliar, unknown territory, which adds to the intrigue and mystery of their visit.

*Having visited Waiheke for the first time – it's a little intriguing, because you can't actually see the island when leaving Auckland. (David)*

*It's also a beautiful crossing on a day like today, everything is so green on the landscape that you pass by. (Daphne)*

*The natural beauty and the Pohutukawa in full bloom as you approach the quay at the bay. (Belinda)*

Visitors also compared their visit to Waiheke Island as a wine region to other wine regions they had visited in terms of typicality of topography and unexpectedness.

*Not typical of wine regions I have visited in Europe – the layout of the land for example. (Maureen)*

*The vineyards are tucked away around the next corner, almost like secret gardens – you never know when you will come across one. (Julie/Rob)*

It is apparent from visitors to the island of Waiheke that there was a feeling of excitement, interest, and mystery when making the journey to the island, which in some instances began with the initial expedition from leaving mainland Auckland and the feel of urban life.

2) The facilities and amenities that were provided

When asked to comment on the winery facilities and amenities, many visitors commented on their first impression upon arriving or entering the vineyard grounds. These impressions were based upon their arrival at the winery grounds, prior to having encountered any personnel from the winery itself, and included their thoughts around feelings of luxury, unpretentiousness, and high quality.

*A feeling of grandeur!* (Rosie)

*Ornate – just like the photographs you see in the brochure.* (Steve)

*Although a little rustic, homely, warm and welcoming.* (Belinda)

*It's gonna be an expensive experience (laughs)!* (Scott).

Some visitors also commented on a feeling of anxiety and unease upon arriving at the vineyard. This could be as a result of a first time experience, a genuine feeling of unease due to their lack of knowledge as to what happens as part of a wine tasting at a winery, and even because there was an expectation that you should have already visited a winery in your lifetime.

*It can be a little daunting when you haven't visited a vineyard before, and the vineyard looks very classical set back up there (points).* (Cassandra)

*Just go with the flow, not knowing what to expect, what it might cost, what's involved – well taste some decent wine one hopes (laughs).* (Scott)

*You step outside your comfort zone and do what all Kiwis are expected to do, that's right eh?* (David)

Initially some visitors showed clear anxiety and uncertainty upon arriving at a winery. It was when they experienced the hospitable nature, and got more familiar with the environment and the personnel, that they became more comfortable in the surroundings.

### 3) Feeling comfortable in the environment

Once visitors had had interaction with winery staff, they described their feelings in the environment in terms of the way in which staff welcomed them. They commented on staff persona and demeanour, reflecting a hospitable welcome each time visits are made to the wineries.

*The young lady was lovely, very welcoming, seemed really pleased that we had taken some interest in the winery, put us at ease very quickly. (Grant)*

*Every time we come here, the staff are different, but they treat us like friends – they're well trained for this though. (Belinda)*

Some staff were even likened to their own family members, who would be adored and admired for their personalities.

*He's gorgeous, just like my grandfather, very knowledgeable and yet not in any way patronising. (Susannah)*

Again comparisons were made of the personnel to other vineyards that may have been visited in other regions and countries. Language and communication do not appear to be barriers, which presents a more natural sharing of knowledge amongst winery staff and their visitors.

*Well there's no language barrier for a start as in France, and Italy. (Douglas)*

*They just know their wines – it's not rehearsed like you often find in other countries. (Gerrard)*

The nature, and manner in which staff are trained to behave, clearly have an effect on how quickly and comfortable visitors became in the winery. Encouraging hospitable, 'family style' relationships with a 'homely welcome' suggests that this may further encourage emotional engagement between winery staff and their visitors.

## 5.4 Emotional Engagement

The experience of meeting staff at the winery is critical, as Charters, Fountain and Fish (2008) identified in their earlier research. They added that visitors need to feel a sense of ‘connection’ not only to the winery but also the role that the staff play in this encounter. In the case of this research project, visitors commented on the authenticity and sincerity and friendliness of staff, which thereby led to a feeling of trust and assurance in their experiences.

### 1) Friendliness of staff

Many of the visitors’ first impressions of staff upon arriving at the wineries focused upon the way in which they have been welcomed and received. They not only commented on their behaviour, but also recognised the individual characters and personalities that some of the staff portray. Some comments include:

*‘He’s gorgeous’, ‘charming people’ ‘lovely nature’ ‘very funny at times’, ‘just like my dad’, ‘make you feel like friends’.*

In addition to the personalities displayed by winery operators, it became evident that this behaviour naturally contributes to the convivial feeling imparted by the winery staff. Staff are likened to their family members, suggesting commonality and instant connection between visitors and winery staff.

### 2) Feelings of being made welcome

Familiarity and general knowledge of the local area, as well as life experiences, and the level of awareness of winemaking processes could contribute to the authenticity of the experience that visitors described:

*He’s been there years and has lived on the island all his life I think? – he sure knows his stuff! (Annabel)*

*His knowledge was phenomenal and we could have spent all day listening to his experiences in the wine industry. (Julie/Robert)*

*It’s fascinating to learn of the history of [name of vineyard] staff are so knowledgeable – they clearly are so loyal to this place. (Daphne)*

*We were the only ones there, and she appeared to just love spending time telling us about the wines. You can tell she owns this place. (Arno)*

*Each time I come here, I learn something new about [name of winery] – I love them! (Rosie)*

Concurring with much of the wine tourism literature it is apparent that one of the motives for visiting a winery is to socialise and learn about wine (Alant & Bruwer, 2004). Evidently the knowledge that is shared by winery staff, regarding their familiarity not only with the product, but also their knowledge and experience of the local area, interjects with the engagement of visitors.

### 3) Levels of interaction and engagement

Visitors also observed the levels of engagement and interaction that they had, not only with the winery staff, but how this then manifested itself amongst other visitors. These levels of interaction not only involved dialogue between both staff and visitors, but also encouraged visitors to become more aware of their sense of taste and smell, which in some cases provoked discussions amongst visitors throughout the groups.

*She was clever – she got the group into a discussion around the idea that this red wine could also be served chilled? (David)*

*I loved the way he asked all the group what they could smell, before we had even tasted the wine. (Scott)*

*Well despite being told we were drinking a gold medal wine, I had a very interesting discussion with a lady in the party, who found the wine quite offensive on the nose apparently! (Annabel)*

*I don't have a sense of smell – so we all laughed about the fact it could have smelt of dog dirt, but I'd drink it anyway (laughs)! (Alfred)*

Interaction between visitors and staff appeared to have some significant effect on the experience that visitors recalled about their visit to the winery. Visitors mentioned how they 'loved' the ways groups were encouraged to interact, and how 'clever' staff encouraged thought provoking discussions. There were also comments about 'interesting' discussions with other visitors and differences in opinion on wine styles. As visitors appear to become more comfortable in the surroundings and amongst their peers, this sociological behaviour may support Kolyesnikova, Dodd, and Laveries (2007) reciprocity theory, in that visitors feel appreciation and therefore have a need to

reciprocate for positive behaviour displayed. This may result in a wine purchase, as recognition and appreciation of the experience that they have encountered.

## 5.5 Generosity and Reciprocity

### 1) No pressure /obligation to purchase

Research has previously suggested that the provision a winery visitor encounters during the visit will not only have an effect on their satisfaction but also may influence their decision to make a purchase whilst at the winery (Mitchell, 2006; O'Neill & Charters, 2006). In this respect, visitors commented on the generosity that was received from some of the wineries.

*Well it's quite common at some wineries to have to pay a tasting fee – but not here which is nice really. (Daphne)*

*I was surprised not to have to pay for a tasting glass. (Rosie)*

*The chocolate cake to match the red wine was simply divine – pure heaven. (Susannah)*

However, it was not just the generosity around the wine tasting experience that visitors commented upon. Visitors expressed their surprise and delight at other facilities provided, such as baby changing facilities, and pet provisions, that might otherwise not generally be expected at a winery.

*They are so child friendly, the cricket set, there's an area for baby changing facilities, dog drinking bowls, and absolutely no obligation to spend anything! (Steve)*

Visitors were also comfortable to spend large proportions of their recreation time at the wineries, insinuating that the main purpose for their visit may not necessarily be to taste wine.

*We brought our own picnic – and have been here all day. (Grant)*

There is no doubt that consumer behaviour is a multifaceted issue and in many instances purchasing behaviour can be explained by objective characteristics such as the price of the product (Kolyesnikova et al., 2007). It is difficult to identify the genuine reason for

purchasing wine products—although feelings of gratitude may instigate a feeling to buy wine in some visitors.

*We had a great time – we will of course buy some wine for dinner this evening.*  
(Julie/Rob)

*We tasted what – four or five wines today? And could have probably tasted more? The least we can do is take a bottle home.* (David)

Some visitors had reasons for not purchasing wine on this particular visit to a vineyard which included the price, transportation concerns, and comparison of quality.

*It's a considerable amount to spend on a bottle of wine – and I'm not certain it is worth risking carrying it back to the UK?* (Douglas)

*We've had a great time here at [name of winery] but the wines are incredibly expensive, and I think we have just as good quality wine back home for half the price.* (Arno)

*Too expensive – wine is wine for goodness sake!* (Cassandra)

Contrary to the belief that winery operators offered considerable generosity whilst conducting wine tastings, there was also a feeling of meanness at some wineries, when they compared winery tastings at New Zealand wineries, to those in other countries that they had experienced.

*You don't seem to get offered as much wine here as you do in say the French vineyards.* (Grant)

*Tastings are much smaller here than back home in Australia (hand gesture to indicate portion sizes).* (Daphne)

*Quite frugal tasting really.* (Maureen)

These comments challenge the notion that winery operators are generous in their offerings particularly from visitors who have visited wineries in other countries and now make comparisons against their experiences overseas.

## 5.6 Brand Awareness/Loyalty

When visitors were asked about their reasons for choosing the particular winery they had visited on this particular occasion, the primary reason for their reason to visit the winery was to taste some wine. This supports the research findings of Hall et al. (2000, p. 86), who pointed out the primary motivations of wine tourists were sampling and buying wine. Three core themes were identified which contributed to this overarching focused theme of 'Brand Awareness/Loyalty'.

### 1) To learn something

A prominent factor that contributed to visitors' reasons for visiting the winery was to increase their awareness of the product by hoping to learn something new, taste something different, and experience the surrounding environment.

*It was very informative, which is what I was hoping for really. (Gerrard)*

*Well I have certainly learnt something today – very enjoyable. (Grant)*

It appears as though some visitors through the knowledge received at the vineyards were then in a position to make comparisons about the quality and difference in characteristics between wines from their own country, and those from Waiheke Island. One gentleman from Australia began to discuss the climate differences, the soil types and geography of the land, thereby explaining the difference in the wine styles.

*There's no doubt their wines are different to those of Australia, and I now know why. (Arno)*

Others recognised the difference that wines from Waiheke have, but could not explain or identify exactly what makes them different. One lady suggested that this could be due to that feeling of being on an island, referring to it as 'island wine'.

*There is something quite different about their wines. (Belinda)*

*I love everything about this island's wine, and just being here in this setting makes it so genuine. (Maureen)*

Levels of knowledge between visitors is varied, and many are able to make comparisons against previous experiences that they have had at previous wineries.

## 2) Recommended to visit by others

Some visitors had heard about the quality of the wine, and had been recommended by others to visit the winery, describing their curiosity and intrigue into becoming more aware of the products.

*Some people we met at our hotel told us about [name of winery] and the exceptional quality of their wines. We came to find out a little bit more. (Alfred)*

*We were informed that the [name of wine] is unique to this vineyard, and I was intrigued as to how and where it came from. (Julie/Robert)*

Visitors also commented on their aspiration to have met the winemaker, after being made aware of the wineries' quality wines.

*Being my first visit to a winery, which was recommended to us by friends, we were hoping to meet the winemaker, but I think she's his wife?(points over). (Scott)*

*Yes I was hoping to have met [name of winemaker]. (Steve)*

*I assumed we would meet the winemaker. (Alfred)*

It appears that the motivation to visit a particular winery could be prompted by a previous recommendation from others, and yet the quality and uniqueness of the wines is supplementary to the aspirations of meeting the winemaker on their visit.

## 3) Familiarity with the winery/product

Nowak and Newton's (2006) research derived from their evidence that positive wine experiences provide an opportunity for wineries to promote relationships with customers and encourage commitment and loyalty, ultimately leading to long term profitability and continued patronage. Respondents mentioned previous involvement they may have had with regard to tasting wines, as well as literature and promotional material that they had come across:

*I've seen this wine in various wine shops, but never actually tried it. (Rosie)*

*I had read a recent review about their wines in one of the cooking magazines – I can't remember? And knowing that we had a forthcoming trip to Waiheke, thought it might be a place we would like to visit. (Belinda)*

*We were actually given a bottle of [name of winery] by our friends when they visited us in the UK a couple of years ago. (Douglas)*

Accolades and recognition of the quality of the wines were also a factor that contributed to visitor encounters to the winery.

*Well isn't [name of winery] renowned for its award winning wines? (Grant)*

*I heard that they produced some gold medal wines here? (Cassandra)*

*Supposedly sweeps up at the New Zealand wine awards every year doesn't it? – I wanted to see for myself. (Annabel)*

Awareness of and familiarity with the reputation of the wine could therefore suggest that a connection with the winemaker may further enhance the experiences of visitors to the cellar door.

## **5.7 Product**

Having recognised several themes that have emerged from this research, which include an appreciation of the settings, the engagement between staff and the levels of service received, it has become apparent that several of the visitors that were interviewed during this project, concur with the finding of Charters and Ali-Knight (2002). Some respondents stated that the product they tasted was not only important to their overall wine tasting experience, but also the level of information that they had received on those wines. Many also considered the taste of the wine in determining whether or not they would ultimately make a purchase, as a result of their experience. Two core themes contributed to this final focused coding theme.

### **1) Quality of the wine products tasted**

*I think I could certainly tell the difference now between a New Zealand Chardonnay and a Sauvignon Blanc. (Julie/Robert)*

*There's no doubt it's a very complex wine, for special times. (Gerrard)*

*The delicious butteriness of their chardonnay – divine! (Belinda)*

Therefore visitors will assess the quality of the wine as a determining factor, however unfamiliarity with the wine type, and tasting something for the first time, was also a reason for making a purchase.

*I'd never even heard of this wine before. Which is why I have purchased this bottle. (Cassandra)*

Value added in terms of the product knowledge, and a more in depth understanding of the wine making processes that visitors were made aware of, were also reasons for purchasing wine as part of their visit.

*Yes I would definitely buy wine from [names vineyard] based on what I have learnt today. (Susannah)*

*A tremendous wine, and wonderful story to accompany it – exceptional value also. (Douglas)*

In contrast to the quality of the wines tasted by visitors, there were clear reasons as to why visitors did not consider making a purchase during their visit to the wineries, namely the price of the product.

## 2) The price of the product

*Lovely wine to drink, but quite expensive. (Maureen)*

*Overpriced! (Douglas)*

*Premium priced wines – not for everyday drinking. (Steve)*

Other comments from visitors when asked about their reasons for not purchasing wine at the winery commented: *'cost', 'too expensive', 'did not think it was worth it', 'did not like for the price', 'incredibly overpriced'*.

It appears, therefore, that no matter how hospitable an experience has been at the winery, with regard to all the factors that have been identified in this research, the price of the wine remains a fundamental factor on determining making a purchase at the cellar door.

## **5.8 Conclusion**

This chapter has striven to make a connection between the five focused themes identified in the previous chapter on the responses of the winery operators to the semi-structured interviews conducted with winery visitors. The themes have been simultaneously presented in this chapter to reflect the statements made by visitors to the wineries, following our conversations. These themes demonstrate that beyond the immediately obvious attractions of tasting wine, they also include a combination of intertwined elements such as the settings, staff, and other various tangible elements, which could include recreational activities, and other facilities provided at the winery.

Chapter 6 will now present a discussion on the findings of both winery visitors and operators and in consequence offer a theoretical model that may propose three dimensions for winery operators to consider when endeavouring to co-create hospitable experiences between their winery staff and visitors.

Chapter 6

## Discussion of Findings



Great oak amongst a vineyard – Waiheke Island

## Chapter 6

# Discussion of Findings

### 6.1 Approach

The primary aim of this explorative research was to understand, identify and describe how wineries on the island of Waiheke, New Zealand, facilitate the co-creation of cellar door experiences between winery operators and their visitors. Implementing a qualitative methodology, the research specifically aimed to establish how winery operators recognise the heterogeneous demands of their visitors to co-create hospitality experiences in an attempt to gain a competitive advantage.

This chapter commences with a discussion around the five focused coding themes that emerged from the interviews held with both the winery operators and the winery visitors. The five focused coding themes that developed from the research findings were i) unique settings, ii) emotional engagement, iii) generosity and reciprocity, iv) brand loyalty/awareness, and v) product. The discussion is situated against the literature on hospitality, co-creation of experiences, and wine tourism, reviewed in Chapter 2.

Adopting a grounded theory approach, this chapter discusses and combines the findings of both winery operators and winery visitors, and ultimately presents a theoretical framework to propose conditions which contribute to the way in which hospitality experiences are co-created at the winery. This framework emerged once a final stage of data analysis had enabled a grounded theoretical model to be conceptualised. This model is presented later in this chapter in Figure 6 (p. 96), and suggests three core themes contribute to the overall co-creation of experiences at the winery. These are i) Environment, ii) Engagement, and iii) Experience. These three themes are illustrated to support the theoretical model presented at the end of this chapter.

### 6.2 Relevance of Participant Contribution

Each of the winery operators were enthusiastic about the intentions of the research and were agreeable to provide regular access to the research sites to allow interviews to be held with visitors to the wineries. The winery visitors that were interviewed for the study also demonstrated a willingness to devote some of their time to the research, enabling data to be gathered.

The use of semi-structured interviews, and field notes, followed by scrutiny of these transcribed discussions, provided an effective means of gathering relevant data for analysis. Alant and Bruwer's (2004), and Charter and O'Neill's (2001) conceptual motivational framework provided a clear structure for organising the data, and 12 initial coding themes emerged from the data provided by the winery operators and the winery visitors. Coherent with the nature of a constructivist grounded theory methodology (Charmaz, 2006), deeper comparisons of these 12 initial themes allowed for five more specific focused themes to emerge. These codes are more concentrated, discerning and theoretical, as Glaser (1978) suggests. Finally, three core themes will now be discussed to support the theoretical underpinning of the initial research questions.

### **6.3 Environment**

In terms of the environment, there was one single focused theme that emerged from the discussions held with both winery operators and winery visitors, namely unique settings.

All of the winery operators commented in more than one way on how they believed the natural surroundings and landscape of the island of Waiheke contributed some individuality and originality to their establishments. Many of the winery operators remarked upon the natural beauty and appeal of the area, which included outstanding views of the area, the authentic landscapes surrounding the winery in terms of becoming immersed in fields of vines, and luscious vegetation. Several of the visitors that were interviewed concurred with these feelings of the attractiveness of the island.

Furthermore, visitors interviewed also commented on their journey and mode of transport to Waiheke Island. They described feelings of intrigue and mystery as to the whereabouts of their final destination upon their initial crossing from the mainland. In some ways, these feelings that visitors described, resonate with the notion of serendipity in that they are hoping to find unexpected and surprising discoveries of pleasure.

Brotherton and Wood (2014) have likened these feelings to a dimension of hospitality as a form of social control. In this sense, they suggest that persons who are unfamiliar with their surroundings and social environment naturally become controlled by the host, and thereby permit hospitality to act as an effective and dominant social control mechanism. This concept is expanded upon later, once visitors are received into the tasting rooms.

Literature has recognised that an important factor in the consumption of wine tourism is now commonly referred to as the ‘winescape’ (Bruwer & Alant, 2009) which Peters (1997) defines as “the attributes of a grape wine region” (p. 4). Moreover, the term winescape has been further explained as a series of factors which not only include wine consumers looking for pleasure, but also encompass the rural countryside where wine agriculture, vineyard landscapes and cellar door facilities are evident (Hall et al., 2000). In a more explicit explanation, Telfer (2000) exemplified ‘winescapes’ by three key features, namely the presence of vineyards, winemaking activity, and the wineries where the wine is produced and stored. On the island of Waiheke, there is no doubt that the rural scenery and natural landscapes support this definition of what determines the ‘winescape’. This may now encompass all of these characteristics outlined in previous literature, but could also include the voyage to and from the wine region of Waiheke Island itself. A culmination of all these tenets may propose that Waiheke Island becomes an ‘isandscape’ with its in future wine tourism literature.

Winery operators believed that each of their wineries had something individual to offer their visitors in terms of the facilities and amenities that were provided at their establishments. For example, one operator commented on the age of the winery and the heritage that the buildings provided within the winery grounds. Another winery operator observed the exquisite facilities and surrounding areas, whilst two of the operators recognised that their facilities and provision may not have quite been at the same standard and level of offering as other vineyards on Waiheke Island. Issues such as unsealed road access, and limited space for indoor seating and dining, are facets still considered to be factors which contribute to experiences their visitors will long remember. Ultimately, though, winemakers on the island of Waiheke believe that their remoteness and detachment from mainland Auckland, along with the natural surrounding beauty the island presents, enables them to position themselves distinct from other wineries and wine regions.

Visitors recognised the facilities and amenities from their first impressions as being ‘*ornate*’ and ‘*grandiose*’, whilst other visitors described feelings of ‘*welcoming and homely*’, which suggests that the wineries endeavour to impart some form of hospitableness upon their visitors’ arrival. This may allude to the work of Lynch et al. (2011), who suggest that visitors who are often strangers and unfamiliar with a particular environment, become ‘socially controlled’ by their hosts. Visser (1991) further suggests that this means of social control becomes more apparent once the social

engagement of hospitality is facilitated with other provisions that encourage further relationships between the host and the guest. This may include a complimentary taste of their products upon being welcomed and unexpected food items such as rich chocolate cake to complement specific wine products. These gestures support Hemmington's (2007) notion that 'lots of little surprises' allow the winery operators to provide hospitality experiences over a period of time in order to maintain interest and enjoyment throughout a visit.

In this scenario, where expectations have been exceeded from a visitor's perspective, hospitality reflected in the wineries sometimes included examples of hospitality that Telfer (2000) described as a reciprocal hospitality motive. This motive intimates that hosts not only give pleasure to get pleasure, but that they entertain in the hope that hospitality will be reciprocated. This was observed on several occasions, with visitors making comments such as '*nice to be offered crackers*' and '*surprising to see*'.

A significant number of visitors, upon entering the wineries, described how welcome they were made to feel by the staff within the establishments. Soon thereafter the feeling of comfort was imparted to them, in the way that they were made to feel quickly acquainted with the surroundings, and the staff who they met. The surroundings and physical space that visitors find themselves in at the wineries may then provide a social means which facilitates the reaffirmation of host and guest relationships. In this manner, hospitality thereby becomes a form of 'social practice' in which "exchange of goods and services, both material and symbolic are used to establish new relationships or build existing ones" (Selwyn, 2000, p. 19).

It is noteworthy at this stage to mention that all of the visitors who described their speedy acquaintance with, and comfort in, their surroundings, did make a purchase from the winery subsequent to their winery experience, which validates Mitchell and Hall's (2004) findings that the physical dimensions of the winery referred to as the 'servicescape' are likely to have a positive effect on sales at the cellar door. This connection also suggests a co-creation of experiences between visitors and locals (Binkhorst & Den Dekker, 2009), whereby winery operators offer their expertise on the wines produced locally.

Bitner (1992) illustrated how the physical environment of a particular business has the ability to influence consumer behaviour. These man-made, physical surroundings Bitner refers to as the 'servicescape' are, in this instance, the winery buildings on Waiheke

Island. The physical surroundings often provide hints or clues about a firm's capabilities and qualities (Rapoport, 1982), which in the case of wineries on Waiheke Island were apparent in the design and layout of the winery, the products that are displayed, and the way in which staff present themselves.

Both visitors and winery operators commented on the irregularities in respect to the physical surroundings. In some instances, these were recognised as being sparser, and lacking in certain provision. This included lack of indoor space or dining facilities, compared to other wineries on the island. Nevertheless, an assumption was made that different markets will have differing opinions about the appropriateness of winery 'servicescapes'. An observation can be made that wineries involved in cellar door sales concentrate more on the level of care and attention they provide for their visitors, than the physical environment.

## **6.4 Engagement**

In terms of engagement, two focused themes materialised from the semi-structured interviews, which ultimately provided the second grounded theoretical concept. These were i) Emotional Engagement and ii) Brand Identity/Awareness.

### **6.4.1 Emotional Engagement**

The connection between the winery visitor and winery staff is generally acknowledged to be of benefit to wineries, who particularly wish to affirm a connection with their brand and their customers (Dodd, 2000; Hall, Sharples, et al., 2000). This relationship will be further assured if it is founded not only on the obvious connection of repeat visits to wineries and regular communication between wineries and their customers, but can extend itself to the emotional dimension connected to this link (Fountain et al., 2008).

With this in mind, O'Mahony et al. (2006) claim that when a visit is made to a winery "there is a powerful opportunity to create not only awareness, but also familiarity and affection" (p.125). In this regard, many of the winery operators spoke about endeavouring to put '*smiles on the faces of their visitors*', and attempting to '*make friends that they hope will return*'. Visitors likewise commented on the manners that staff displayed to them, with particular affections such as '*being gorgeous*' and '*wanting to spend time*' with them. The friendliness of tasting room staff and their ability to interact and engage with visitors support Nowak and Newton's (2006)

suggestion that this emotional connection involves making winery visitors believe that the winery cares about them as a person rather than as just another customer.

Furthermore, this connection between the involvement of guests, the product, and the tasting experience may support the claims of Pine and Gilmore (1998) and Shaw and colleagues (2011) that in a tourism context, co-creation in this form creates unique experiences.

Evidently, visitors to wineries notice the intangible elements of their winery experience such as good service and hospitable staff, which suggests that winery operators consider the service as well as the product experienced at the cellar door. O'Neill et al. (2002) believe that the quality of service received at the cellar door is critical, in that all components of the winery, including both tangible and intangible elements such as friendliness, courteousness and knowledge of staff, are of extreme importance to winery visitors. Service-dominant (S-D) logic (Lusch, Vargo, & O'Brien, 2007) expands this perspective and proposes that the communication between companies and customers has altered in more recent times (Payne, Storbacka, & Frow, 2008). In a more traditional service-dominant communication, service has traditionally been regarded as one-way, and may have included advertisements, and direct mailing. Whereas S-D logic now encourages a two-way dialogue between the customer and service provider, ultimately strengthening a mutual service. By providing relevant information and resources to customers, service providers will feel more inspired to support customers in their co-creation activities (Payne et al., 2008). On the island of Waiheke, winery operators should continue to embrace visitor engagement and foster relationships that create feelings of being welcomed and comfortable in their surroundings.

#### **6.4.2 Brand Identity/Awareness**

Cellar door visits provide winery operators with an occasion to create a connection between brand association and the winery itself (Lockshin & Spawton, 2001; Mitchell & Hall, 2004). Likewise these cellar door visits provide an opportunity for wineries to develop long-term relationships with their visitors, which can ultimately lead to post-visit sales, repeated visits, or referrals upon returning home (Charters & O'Neill, 2001; O'Neill et al., 2002). It is evident from the responses of the winery operators at the Waiheke wineries that there is some proactive encouragement for staff to establish from their visitors how they found out about a particular winery, and their reasons for visiting their winery. Some visitors commented that they had heard about the wineries either

from other people that they had met or from acclamations that they had read about in food and wine related articles, and others had been recommended to visit wineries from literature they had received whilst on Waiheke Island.

Even though it is widely acknowledged that one of the benefits of wine tourism is for wineries to establish brand loyalty with their visitors (Hall et al., 2000), it has also been recognised that brand loyalty with winery visitors involves extending this relationship to become an ongoing connection with the winery after visitors have left. Fountain, Fish, and Charters (2008) concede that brand loyalty will be further reinforced if visitors to wineries have such a memorable time at the winery, they will leave with an emotional attachment to the wine. Winery operators on the island of Waiheke have made it clear in their statements that they are hoping that visitors remember their experiences at the wineries, and engage emotionally in the '*terroir*' around them. '*Informative and quintessential experiences*' were factors that operators were hoping that they would be remembered for by their visitors. This can be further elaborated on, in that each of the winery operators recognised the number of wineries on the island that visitors have the option of visiting. They believe that by providing a distinctive experience at the winery, allowing visitors to '*build their own experience*', they will share their experience with others, as well as showing appreciation and gratitude to the wineries. This concurs with Prahalad and Ramaswamy's (2004c) argument that co-creation is a process through which customers engage with the companies and generate their own experiences.

Visitors also recognised these experiences as being '*unique*' and '*fascinating*' in terms of the levels of engagement between themselves and the staff. They commented on attributes staff displayed such as being '*clever, [with] phenomenal knowledge, fascinating*', they also spoke about the products being '*stunning, exceptional quality*', and made comparisons of the wines as being '*quite different*' to wines from other countries.

Although it was evident that wineries on the island of Waiheke were making conscious efforts to establish stronger brand loyalty through a more personalised and distinctive experience, which may include stronger emotional connections between themselves and their visitors, it still remains to be seen whether these efforts have had a longer term effect on instilling brand loyalty with their visitors post-visit.

## **6.5 Experience**

In relation to experience, three focused themes emerged from the semi-structured interviews, of both the winery operators and the winery visitors. These are i) Generosity and Reciprocity, ii) Brand Identity and Awareness, and iii) Product. Brand Identity and Awareness has been discussed in the previous section of this chapter, and will be further discussed in this chapter pertaining to the overall experience visitors encountered.

### **6.5.1 Generosity and Reciprocity**

Many of the wineries on the island of Waiheke are relatively small, independent, and often family run organisations, which therefore involve a small team of staff with a ‘hands-on’ approach undertaking many of the day to day functions. One of the challenges of any small producing winery is the inability to distribute through wholesale or retail channels, therefore becoming dependent on winery sales at their premises (Kolyesnikova et al., 2007). These challenges apply to many of the wineries included in this research project, and as findings in the previous chapters have illustrated, there were some differing feelings as to thinking around the notions of gratitude and obligation displayed at the winery. Emergent from the findings of the respondents of this case study, was whether or not winery visitors felt obliged to make a purchase following their winery experience. Likewise, the opinion of winery operators on their attitudes to visitor purchasing behaviour will now be identified.

From the winery operators’ perspective, the majority of them did not feel as though it was necessary for visitors to incur any charge to partake in wine-tasting activities at their particular winery. This was in the belief that if visitors became involved in the experience, and felt appreciative of the time that staff had spent with them, they would in turn reciprocate this respect through making a purchase. This supports the findings of a study by Kolyesnikova, Dodd, and Laveries (2007), in that a feeling of gratitude, and a sense of appreciation from their visitors would result in an obligatory purchase on their behalf. This idea of generosity and reciprocity can be compared to Lashley’s (2000a) metaphor of hospitality being “likened to a set of behaviours in the form of mutuality and reciprocity, thereby creating unselfishness and kindness”(p.34).

An appreciation that many visitors had made specific journeys to the island of Waiheke, at considerable cost, to become involved in a wine-tasting experience was observed by some winery operators. This may suggest that some operators felt it more important to

provide visitors with an enjoyable and memorable occasion, which would further complement their wider experience of visiting Waiheke Island.

In contrast, observations from winery respondents involved in the research project commented that it is acceptable and '*quite normal*' to charge visitors a tasting fee, in the belief that it would have no effect on a visitor's purchasing behaviour. Ultimately this factor would be determined by how well visitors had enjoyed their time at a particular winery. This observation questions the effect of the reciprocity norm that Kolyesnikova et al. (2007) propose, and may then provide some discussion for future research as to whether or not the exchange of experiences at wineries on the island of Waiheke has any effect on the purchasing behaviour of visitors.

From a visitor's perspective, the generosity that was displayed at the wineries was once again more about the overall experience that they received, and many of the international visitors that were interviewed, expressed their '*surprise*' and '*delight*' that they were not required to pay to taste wine. Some visitors also commented on the wider provision and services that were extended to them, as well as the feeling that there was no expectation nor pressure for them to taste wine at all, during their visit to the winery. An example here was a participant who made it apparent that their primary reason for visiting a particular winery was simply because of its location, and their intention was to have a family picnic there.

This gesture that there is no obligation for winery visitors to engage in any form of activity that provides commercial gain for an organisation, underpins the work of Lashley and Morrison (2000b), who ascertained the notion of hospitality as being a relationship between hosts and guests. To be effective, guests need to feel a genuine nature of kindness and generosity in their hosts, and there should be an apparent desire to please. Conversely, where guests sense an ulterior motive in the behaviour of their hosts, that is to gain commercial advantage, then this can hinder the overall intention of the host. This relationship then supports another motive of hospitality that Telfer (2000) regards as vanity. In this context, the host-guest relationship has now become one in which the ultimate intention of the host is a desire to benefit from the guest. Although this was not apparent in this research project, winery operators may need to consider how their hospitality motives are perceived by their visitors.

### 6.5.2 Brand Identity and Awareness

A number of the visitors to the wineries on Waiheke had previous knowledge or awareness of the wineries that they had chosen to visit. Some claimed that they *'had read or tasted about their award winning wines'* whilst others had visited the winery on a previous occasion, and were returning to *'learn more about new wines'*. The process of co-creation has been recognised as a way in which customers can increase their social status, through the valuable knowledge that they bring and share with others (Grisseemann & Stokburger-Sauer, 2012). This may also involve participation with other like-minded communities sharing similar interests which may then enhance communications, and create a more enjoyable atmosphere (Etgar, 2008). In one instance, a visitor commented on their enjoyment in having a conversation with the winemaker about the *'differences between New Zealand Sauvignon Blanc and French Sauvignon Blanc'*. These subjective attributions between the visitor and the winemaker are defined by Franke, Schreier, and Kaiser (2010, p. 210) as the "I designed it myself" effect, referring to the "value increment a subject ascribes to a self-designed object arising purely from the fact that he/she feels like the originator of that object" (Franke et al., 2010). Another example of this relates to an encounter a participant had *'wandering amongst the vines and seeing where that wine had been created'*. Franke et al. therefore conclude by proposing that co-creation outcomes depend upon customers' evaluations of their own contribution.

### 6.5.3 Product

It is widely acknowledged that one of the most apparent motivations of any wine tourist is primarily to taste and purchase wine (Hall, Sharples, et al., 2000). Bruwer (2002) subsequently distinguished some 'secondary or peripheral' motivations, such as socialising and learning about wine. These viewpoints therefore accept the needs concerning the wine product and also allow for the desires regarding more tourist oriented factors to be recognised (Alant & Bruwer, 2004).

The findings of this study support these observations, in that many of the winery operators make the assumption that visitors are making specific trips to their wineries with an intention to taste wine. They also clearly believed that their products demonstrated innovative winemaking techniques resulting in high quality wines of exceptional value. These tangible components of the wine tasting experience therefore possibly contribute to the overall staging of the wine tourist experience, and

complement the wider aesthetic components. This may include the settings, and service interactions, which Pikkemaat, Peters, Boksberger and Secco (2009) advocate are fundamental factors in the staging of a wine tourism experience, and thereby underline the existing potential for winery operators on the island of Waiheke to create memorable experiences at their wineries.

From a winery visitor's perspective, the wine product was not the primary reason for visiting the winery, and visitors regularly commented that when visiting a winery it was not just to taste good wine. In some instances, visitors were actually unfamiliar with the products on offer. They commented on the overall experience, which included what they had learnt from their visit, and whom they had interacted with during their visit. These observations concur with earlier suggestions by O'Neill, Palmer and Charters (2002) that the quality of the product is less of an issue than the overall experience and service received at the winery. Moreover, from the information received at the wineries, many visitors expressed how much more their wine awareness had increased. Some of the respondents spoke of the confidence acquired in being able to recognise wine varieties, as a result of the tasting experience.

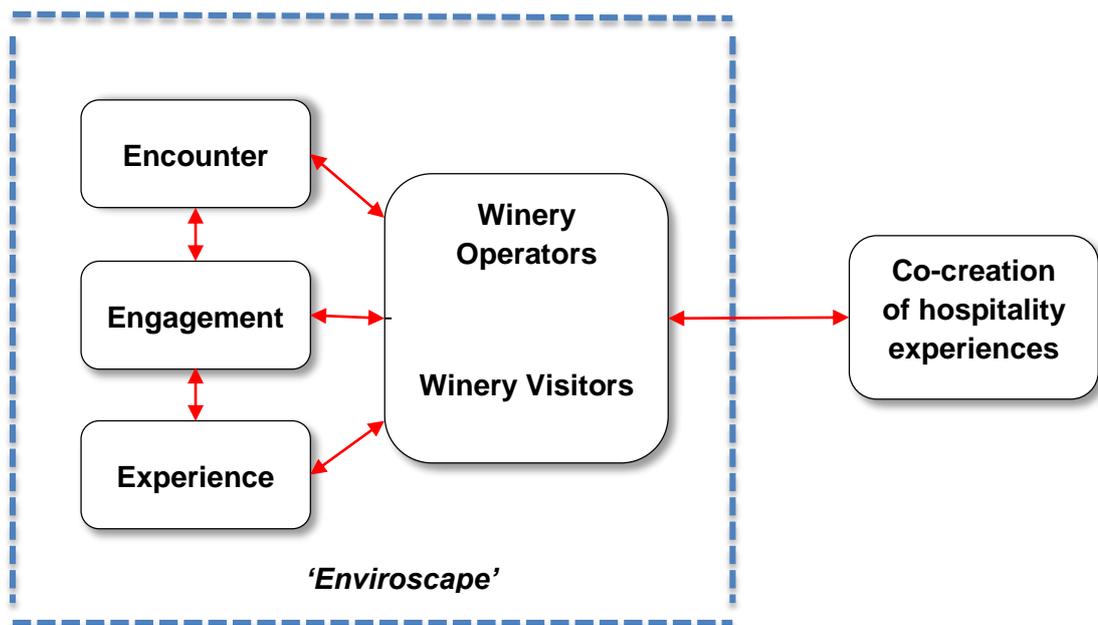
It also became apparent from the comments of many of the visitors that one of the reasons for making a purchase at the winery may not necessarily have been because they desired the taste of a particular wine, but in some instances reasons for purchasing were because of unfamiliarity with the wine, and more apparently from the 'connection' that had emerged between themselves and staff. This 'connection' may alternately be described as the 'rapport' between the host and visitors which describes and authenticates the interaction between winery staff and visitors, and endorses Charters, Fountain and Fish's (2008) study. A sense of loyalty from what had been '*learnt*', the '*great times*' that had been had, and the '*hospitality*' that had been displayed, were all factors that led to wine purchases being made by visitors. The staff's ability to engage with visitors, and therefore delight visitors, is recognised by Charters, Fountain, and Fish (2008) as being important to achieving an equilibrium between a commercial operation and a hospitable encounter.

The findings of this research have cause to explain what a 'hospitable encounter' may constitute at a winery on the island of Waiheke. Based on the comments of participants, and observations from the research, the findings suggest that this could contain an element of the unexpected, uniqueness and serendipity in terms of the overall

environment and surroundings within which visitors are placed. In the case of Waiheke Island, it lends itself to the location as a wine area surrounded by water, soaked in natural beauty, with spectacular vistas and original architecture. Additionally, it is vital that the welcome that visitors receive, and the ease at which they are placed in the winery surroundings, will allow for opportunities to become quickly comfortable in their surroundings and engage with others. Furthermore, the enthusiasm, passion, and authenticity that is exposed to visitors will contribute to an overall hospitable experience.

### 6.6 Emergent Theoretical Model (The Three ‘E’s)

As a result of this discussion, and the three emergent themes that arose from the methodological approach adopted for this research, a theoretical framework to underpin the overarching question that this project has endeavoured to answer is now presented in Figure 6.



**Figure 6.** Co-creating hospitality experiences at the cellar door: The Three ‘E’s

Through a broader comprehension of the provision of hospitality and the recognition that customers’ perceptions are changing, there is inevitably a requirement for winery operators to distinguish themselves, in order that they remain competitive. Indications of the co-creation experience are observed in a variety of realms as a basis for value and innovation (Binkhorst & Den Dekker, 2009). However, to date, literature pertaining

specifically to wine tourism, and the co-creation of hospitality experiences at wineries, remains sparse.

This theoretical model suggests that in order for a hospitable experience to be encountered at the winery, there are initially three denominating factors that winery operators should consider in the co-creation of hospitable experiences at the cellar door. These are firstly the initial encounter which encompasses the winery and the unique settings within which wineries on the island of Waiheke are situated. This will encompass the initial voyage to the island of Waiheke, the island location and detachment from mainland Auckland, and the natural beauty and surroundings that the island boasts. Secondly, there is the engagement between winery staff and visitors to the island. This may take into account the hospitality, generosity, and welcome to all parties, the notion of reciprocity and generosity for experiences perceived, and the awareness of the wine product and brand. Finally, the experience of the overall visit contributes to the co-creation of this hospitable encounter and includes the level of service and information that visitors are provided with, as well as the quality of service and products, and will encompass the aesthetic factors of the winery visit, as well as the tangible elements which include the wine product itself.

With this in mind, the research has encapsulated the three themes (referred to as the ‘Three E Model’) and I would argue that, when embedded within a cellar door environment, a winery ‘enviroscape’ is created. The term *Enviroscape*® is a registered company that is a series of portable three dimensional environmental classroom aids that are designed for all age levels to view the causes and effects of pollution and the ways to prevent it. The term *enviroscape*® has only been cited in previous academic literature with particular reference to the pollution, and conservation of the global environment, and thereby provides a new perspective for researchers to consider in the field of wine tourism. Winery operators should now acknowledge that hospitable encounters are created when three intangible elements—namely, the encounter, the engagement, and the experience—coalesce within a cellar door environment.

This theoretical model therefore proposes that hospitality experiences are co-created when an *Enviroscape* within the cellar door is formed.

## **6.7 Conclusion**

Based on the objectives of this study, it is evident that the visit to a tasting room comprises a number of factors recognised by winery operators as important aspects to consider when attempting to provide an experience for successful engagement and memorable experiences of their visitors. Likewise, there is correlation between these factors that visitors also seek out, and recognise when visiting a winery. Winery operators should recognise, however, that not all visitors to their wineries are homogenous and that most visitors are looking for some ‘emotional connection’ between the winery, the relationships established, and the overall tasting experience encountered. Winery operators should therefore give thought to achieving a balance between their commercial operations, how they co-create a visitor experience, whilst providing true hospitable experience at their wineries.

Chapter 7

## Conclusions



Little Oneroa Library – Waiheke Island

## Conclusions

### 7.1 Introduction

This chapter reviews the specific aim of the study which was to investigate how winery operators deal with the heterogeneous demands of their visitors endeavouring to co-create hospitality experiences at their wineries. As indicated in the literature review, although it acknowledges the increasing research in the wine tourism domain, there still remains a knowledge gap in relation to recognising the interactions between winery visitors and their operators in the co-creation of experiences at the cellar door. The purpose of this chapter is to draw conclusions from the findings and discuss the implications of this research. Finally, recommendations for future research are suggested.

The study was guided by three principal objectives which were to:

- Critically analyse the environmental and social influences required to meet visitor expectations, enhance the hospitality experience and ensure brand loyalty.
- Evaluate the co creation of roles by visitors and operators, to meet expectations and provide hospitable experiences.
- Provide recommendations for winery operators to consider when staging cellar door experiences to enhance the visitor experience.

### 7.2 Implications of the Research

From a theoretical perspective, there are three findings to emerge from this research that have been proposed in the theoretical model presented in the previous chapter. This thesis is the only research study focusing on Waiheke Island in New Zealand wine tourism to have examined the behaviour, experience and attitudes of winery visitors and winery operators, with specific relevance to the co-creation of hospitality experiences at the cellar door. Whilst a single case study cannot prove a solid basis for the co-creation of experiences at all wineries, this study highlights several findings relevant to the wine tourism industry. Each of the findings and their implications are presented and discussed below.

### **7.2.1 The Serendipity of the Whole Encounter**

There was significant evidence to suggest that the initial experience of travelling to an island by ferry crossing held senses of intrigue and mystery about visiting the island of Waiheke. Natural beauty approaching the island, and the topography of the landscape upon arrival at the island, also resonated with some visitors that it was not typical of previous wine areas in other parts of the world. Visitors were noticeably impressed with the facilities and amenities that were provided at the various vineyards they had visited, which allowed them to make comparisons and comment on the variance in surroundings they encountered. Anxiety for less experienced winery visitors was also made apparent, in the respect that some visitors expressed unease and uncertainty. Winery operators therefore need to be mindful that the initial encounter is often an emotional experience for many visitors, some of whom will bring with them pre-determined ideas and expectations, based on previous experiences of visiting wineries, whilst others will have some optimism in extending their current knowledge and experience of wine tourism. Winery operators should also receive visitors with the recognition that they all arrive looking for what Gilmore and Pine (1999) refer to as an “event” which will ultimately enhance the wine tasting experience.

### **7.2.2 Mechanics for Engagement of Visitors**

The research suggests that concepts of hospitality experiences are experienced both socially and commercially not only in terms of food and drink provision, but also in aspects of entertainment (Brotherton, 1999; King, 1995).

With this in mind, many of the winery operators recognised that their visitors have made considerable allowances to visit their winery, often at considerable cost. For many of the operators, therefore, it is important that the practices and procedures of frontline staff should be engagement and development of relationships that shape being hospitable. This may be in the form of little unexpected complimentary offerings, snippets of information to supplement the knowledge they have acquired, personal engagement with winemakers, and other prominent personnel involved in the winery operation. There is evidence to suggest from the visitors that a feeling of ‘emotional connectedness’ between themselves, the environment and the staff, will assist in creating experiences that they will remember and take home with them later.

### **7.2.3 The Experience of Creating Memories**

The findings demonstrate that the interactive and technical nature of wine tasting will require some form of control on the winery staff performance both in a formal and informal way. It is therefore important that winery staff attain the right level of conduct and attitude in ‘tuning’ into their visitors needs and expectations. This should be achieved in such a way that the whole encounter is a balance between a genuine hospitable encounter and a commercial operation (Charters, Fountain, et al., 2008). Winery operators recognise that visitors come with differing experience, expectations, and ideas about their winery visit, and it is therefore important that visitors are treated as individual guests, and not as a homogenised group. Winery staff comment that their intention is to leave lasting memories of visits to their wineries. The research also suggests that winery visitors expect genuine encounters and lasting memories of their visit to the island of Waiheke.

Thus, in order for successful hospitality experiences to be co-created at the cellar door, winery operators need to be aware, that it is more than the human interaction between themselves and their visitors that creates such experiences. A combination of three intangible elements (The Three E’s) Encounter, Engagement and Experience should be recognised by winery operators as contributing to a successful winery encounter between themselves and their visitors. These three elements combine and form an ‘enviroscape’, which now positions itself within a cellar door to encourage the co-creation of hospitable encounters.

### **7.3 Recommendations for Future Research**

This study was qualitative in nature and explored a number of concepts regarding wine tourism, hospitality, and the theory of co-creation. One question that may require further exploration from this study is how larger wineries may consider measuring their service offering in terms of the value of a truly hospitable experience against a more commercialised service experience.

Secondly, wine tourism characteristics can inevitably contribute to the winery visitors’ overall experience, and can take many forms. An understanding of these characteristics, from a winery visitor’s perspective, may provide winery operators with the opportunity to validate that they are providing the encounter, engagement, and experience that this research has proposed is important to the co-creation of experiences.

Finally, it could be suggested that further studies measure the impact of a winery co-created encounter on the post-visit purchase, and repeat visits to wineries. A more longitudinal research approach may explore how the hospitality experience of visitors to wineries, has increased brand loyalty, and improved product knowledge as well as increased purchasing behaviour.

In conclusion, as the researcher expressing a final thought on this research project, it has become apparent to me that the quality of a winery visit can no longer be assessed solely on the interaction between myself and the cellar door staff. Other intangible factors need to be considered and compared, prior to a judgement of the overall experience encountered.

#### **7.4 Final thoughts**

In conclusion, as the researcher expressing a final thought upon revisiting the title of this research “Co-creating Hospitality Experiences at the Cellar Door”, an assumption is made that the process of co-creation is one that manifests from a process of engagement between people. On the contrary the findings from this research project suggest that hospitality experiences are enhanced at the winery in a ‘winery enviroscape’. This project highlights in particular the three elements that establish the enviroscape, and therefore provide some thoughts for winery operators to consider when offering a cellar door experience to their visitors.

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Little Oneroa Beach

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# Appendices

# Interview Guide Outline

## (Operators)



*The following questions will form the basis of the structure to the interview to be conducted. Responses to questions may require further questioning to establish further depth and meaning.*

### Preliminary Questions

- Can you tell me a little more about the winery in terms of its size, evolution, production levels, age, approx visitor numbers etc?
- What provision do you currently offer visitors to the winery?

### Intermediate Questions

- What do you believe visitors to your winery are looking for when they visit (name of winery)?
- Do you believe you meet these expectations, or even exceed them – (How?)
- What do you think are the reasons for visitors coming to the winery?
- How do you measure visitor satisfaction to the winery?

### Ending Questions

- What do you feel are the most important ways of attracting visitors to your winery?
- Is there anything you think you could be doing to improve the experience of visitors to the winery?
- Is there anything else that you think I should know / understand better to inform this research?

# Interview Guide Outline

## (Visitors)



*The following questions will form the basis of the structure to the interview to be conducted. Responses to questions may require further questioning to establish further depth and meaning.*

### Preliminary Questions

- Tell me your reasons for visiting (name of vineyard) winery today?
- Are you visiting the winery alone or with others?
- Is this your first visit to a winery on Waiheke / NZ / anywhere else?

### Intermediate Questions

- What if anything did you know about (name of vineyard) prior to your visit ?
- Can you tell me a little more about your experience today in terms of what happened during your time here?
- How does this experience compare with other visits to wineries you have visited (only if they have revealed prior visits) in terms of facilities, surroundings, service, product, merchandising, anything else?
- Was there anything you were hoping to gain from your experience that perhaps didn't happen?
- As you look back on your experience – is there anything that stands out for you?

### Ending Questions

- Tell me about your thoughts on any future visits you may have to future wineries?
- After having visited (name of vineyard) what feedback would you give to the operator(s) of this winery?
- What advice would you give to someone visiting a winery for the first time?
- Tell me about how your view on visiting wineries may have changed since visiting (name of winery) today?
- Is there anything else that you think I should know /understand based on our discussion today?

## Appendix B: Initial Letter to Wineries



XXX October 2012

(Winery Operator)

Dear XXXXX

### **Invitation to Participate in Research in Wine Tourism Study**

My name is John Kelly and I am the Head of Department – Culinary Arts, in the School of Hospitality and Tourism at Auckland University of Technology. I am currently in the process of completing my Masters in International Hospitality Management within the school. I am conducting research on the experiences of visitors to wineries on the island of Waiheke, exploring how the interaction of visitors and winery operators 'co-create' experiences that provide hospitable experiences. My thesis is entitled '***Co-creating Hospitality Experiences at the Cellar Door- The Case of Waiheke***'.

I am writing to you to establish whether you would be interested in becoming involved in my research project as an operator currently of a vineyard on Waiheke Island. I have attached to this letter a copy of the Participant Information sheet for both winery operators and visitors to the wineries, which provides more information about the intentions of this research proposal.

My proposed field research is intended to be carried out from mid November through until mid December, however if you feel that this would be an inconvenient time upon which to conduct this research, I would be happy to discuss this further with you.

If you would like to be involved in this research – I would appreciate if you send me a brief email expressing your interest at [john.kelly@aut.ac.nz](mailto:john.kelly@aut.ac.nz) I will then arrange to discuss in more detail my research intentions.

I look forward to hearing from you.

Yours sincerely

**JOHN KELLY**  
Head of Department – Culinary Arts

# Participant Information Sheet

(Winery Operators)



## Date Information Sheet Produced:

7<sup>th</sup> October 2012

## Project Title

'Co-creating Hospitality Experiences at the Cellar Door'. – The Case of Waiheke

## An Invitation

My name is John Kelly and I am a Senior Lecturer in the School of Hospitality and Tourism at Auckland University of Technology. I am currently in the process of completing my Masters in International Hospitality Management within the school. I am conducting research on the experiences of visitors to wineries on the island of Waiheke, exploring how the interaction of visitors and winery operators 'co-create' experiences that provide hospitable experiences. Participation is voluntary and you may withdraw at any time during the data collection process.

## What is the purpose of this research?

This proposed research will investigate and evaluate the factors that affect people's experiences at wineries based on the island of Waiheke. I am interested in finding out about what experiences you provide at the winery that contribute to providing a hospitable experience for your visitors. By having a better understanding of visitor's experiences through interviewing them also I am hoping to provide winery operators with recommendations for improving visitor experiences at their wineries.

## How was I identified and why am I being invited to participate in this research?

All wineries on the island of Waiheke were invited to participate in this research following an initial letter explaining the purpose of the research, and an invitation to be part of this research. Those that have volunteered are considered participants. The main criteria for participants are that they are willing to be interviewed. You were consulted in the invitation letter, and further to your agreement have now been approached to be interviewed.

## What will happen in this research?

You will be interviewed for approximately 20minutes (may take a little longer – depending upon your responses) during which time you will be asked a few questions about your experiences at the winery. These interviews will be digitally recorded and possible notes taken, and the data collected will only be used for my academic research, enabling me to write my thesis towards my Master's qualification.

## What are the discomforts and risks?

There will be no discomfort or risk to you as a participant. All attempts will be made to ensure that any responses to questions cannot be overheard by other visitors to the winery.

## **How will these discomforts and risks be alleviated?**

If you feel any discomfort or risk to yourself as the participant during the interview, you are welcome to stop the interview and leave.

## **What are the benefits?**

The primary benefit of this research is for me to complete my thesis and therefore graduate with my Masters in International Hospitality Management. However the findings of this research will also enable me to produce other academic outputs such as a journal article or conference presentation, which will advance the knowledge in the field of wine tourism.

## **How will my privacy be protected?**

Once the data has been collected, the confidentiality and privacy of all participants will be assured through careful storage of the data and separation of the consent forms from the data gathered. You will be given an alias to hide your identity in the final report findings.

## **What are the costs of participating in this research?**

Interviews will take approximately 20 minutes, and can be conducted at your convenience.

## **What opportunity do I have to consider this invitation?**

I will allow sufficient time for you to read the Participant Information Sheet and ask any questions you may have. If you do not wish to participate then I thank you for your time. If you have time to assist in this research, I will arrange a convenient time to both parties in which the interview can be conducted. This should take approximately 20minutes, however depending upon your responses, this may take a little longer. If you would like to participate, but now is not convenient, then I will give you my email address and you can contact me at a more convenient time.

## **How do I agree to participate in this research?**

You will need to complete the consent form that is attached to this Participant Information Sheet, and hand it to me before I can commence with the interview.

## **Will I receive feedback on the results of this research?**

If you would like feedback on the results of this research you will need to complete the section 'contact details' on the consent form, and feedback on the results of this research will be sent to you.

## **What do I do if I have concerns about this research?**

Any concerns regarding the nature of this project should be notified in the first instance to the Project Supervisor, *Dr Heike Schanzel*. School of Hospitality & Tourism. AUT University. [Heike.schanzel@aut.ac.nz](mailto:Heike.schanzel@aut.ac.nz). T:09 921 9999 ext6923

Concerns regarding the conduct of the research should be notified to the Executive Secretary, AUTECH, Dr Rosemary Godbold, [rosemary.godbold@aut.ac.nz](mailto:rosemary.godbold@aut.ac.nz), 921 9999 ext 6902.

## **Whom do I contact for further information about this research?**

### ***Researcher Contact Details:***

John Kelly, Senior Lecturer, School of Hospitality & Tourism, Faculty of Culture & Society, [john.kelly@aut.ac.nz](mailto:john.kelly@aut.ac.nz) t:09 921 9999 ext8457

***Project Supervisor Contact Details:***

Dr Heike Schanzel, School of Hospitality & Tourism, Faculty of Culture & Society,  
[heike.schanzel@aut.ac.nz](mailto:heike.schanzel@aut.ac.nz) t: 09 921 9999 ext 6923

**Approved by the Auckland University of Technology Ethics Committee on *type the date final ethics approval was granted*, ATEC Reference number *type the reference number*.**

# Participant Information Sheet

(Winery Visitors)



## Date Information Sheet Produced:

7<sup>th</sup> October 2012

## Project Title

'Co-creating Hospitality Experiences at the Cellar Door'. – The Case of Waiheke

## An Invitation

My name is John Kelly and I am a Senior Lecturer in the School of Hospitality and Tourism at Auckland University of Technology. I am currently in the process of completing my Masters in International Hospitality Management within the school. I am conducting research on the experiences of visitors to wineries on the island of Waiheke, exploring how the interaction of visitors and winery operators 'co-create' experiences that provide hospitable experiences. Participation is voluntary and you may withdraw at any time during the data collection process.

## What is the purpose of this research?

This proposed research will investigate and evaluate the factors that affect people's experiences at wineries based on the island of Waiheke. I am interested in finding out about your experience at the winery in terms of your reasons for visiting the winery, your expectations during your visit to the winery, and any encounters during your visit that may have had any influence on your behaviour. By having a better understanding of visitor's experiences I am hoping to provide winery operators with recommendations for improved visitor experiences.

## How was I identified and why am I being invited to participate in this research?

All visitors to the wineries are considered participants. The main criteria for participants are that they are willing to be interviewed. The winery operators have been consulted to determine the most appropriate method for recruiting participants, and it was felt that to approach visitors during their visit to the winery would be an appropriate way to find participants.

## What will happen in this research?

You will be interviewed for approximately 20minutes (may take a little longer – depending upon your responses) during which time you will be asked a few questions about your experiences at the winery. These interviews will be digitally recorded and possible notes taken, and the data collected will only be used for my academic research, enabling me to write my thesis towards my Master's qualification.

## What are the discomforts and risks?

There will be no discomfort or risk to you as a participant. All attempts will be made to ensure that any responses to questions cannot be overheard by other visitors to the winery.

## How will these discomforts and risks be alleviated?

If you feel any discomfort or risk to yourself as the participant during the interview, you are welcome to stop the interview and leave.

### **What are the benefits?**

The primary benefit of this research is for me to complete my thesis and therefore graduate with my Masters in International Hospitality Management. However the findings of this research will also enable me to produce other academic outputs such as a journal article or conference presentation, which will advance the knowledge in the field of wine tourism.

### **How will my privacy be protected?**

Once the data has been collected, the confidentiality and privacy of all participants will be assured through careful storage of the data and separation of the consent forms from the data gathered. You will be given an alias to hide your identity in the final report findings.

### **What are the costs of participating in this research?**

Interviews will take approximately 20 minutes, and can be conducted at your convenience.

### **What opportunity do I have to consider this invitation?**

I will allow sufficient time for you to read the Participant Information Sheet and ask any questions you may have. If you do not wish to participate then I thank you for your time. If you have time to assist in this research, I will arrange a convenient time to both parties in which the interview can be conducted. This should take approximately 20minutes, however depending upon your responses, this may take a little longer. If you would like to participate, but now is not convenient, then I will give you my email address and you can contact me at a more convenient time.

### **How do I agree to participate in this research?**

You will need to complete the consent form that is attached to this Participant Information Sheet, and hand it to me before I can commence with the interview.

### **Will I receive feedback on the results of this research?**

If you would like feedback on the results of this research you will need to complete the section 'contact details' on the consent form, and feedback on the results of this research will be sent to you.

### **What do I do if I have concerns about this research?**

Any concerns regarding the nature of this project should be notified in the first instance to the Project Supervisor, *Dr Heike Schanzel*. School of Hospitality & Tourism. AUT University. [Heike.schanzel@aut.ac.nz](mailto:Heike.schanzel@aut.ac.nz). T:09 921 9999 ext6923

Concerns regarding the conduct of the research should be notified to the Executive Secretary, AUTEK, Dr Rosemary Godbold, [rosemary.godbold@aut.ac.nz](mailto:rosemary.godbold@aut.ac.nz), 921 9999 ext 6902.

### **Whom do I contact for further information about this research?**

#### ***Researcher Contact Details:***

John Kelly, Senior Lecturer, School of Hospitality & Tourism, Faculty of Culture & Society, [john.kelly@aut.ac.nz](mailto:john.kelly@aut.ac.nz) t:09 921 9999 ext8457

***Project Supervisor Contact Details:***

Dr Heike Schanzel, School of Hospitality & Tourism, Faculty of Culture & Society,  
[heike.schanzel@aut.ac.nz](mailto:heike.schanzel@aut.ac.nz) t: 09 921 9999 ext 6923

**Approved by the Auckland University of Technology Ethics Committee on *type the date final ethics approval was granted*, ATEC Reference number *type the reference number*.**

Appendix D: Confidentiality Agreements

# Confidentiality Agreement



*For someone transcribing data, e.g. audio-tapes of interviews.*

*Project title: 'Co-creating Hospitality Experiences at the Cellar Door'*

*Project Supervisor: Dr Heike Schanzel*

*Researcher: John Kelly*

---

- I understand that all the material I will be asked to transcribe is confidential.
- I understand that the contents of the tapes or recordings can only be discussed with the researchers.
- I will not keep any copies of the transcripts nor allow third parties access to them.

Transcriber's signature:.....

Transcriber's name:.....

Transcriber's Contact Details (if appropriate):

.....  
.....  
.....  
.....

Date:

Project Supervisor's Contact Details (if appropriate):

.....  
.....  
.....

***Approved by the Auckland University of Technology Ethics Committee on type the date on which the final approval was granted AUTEK Reference number type the AUTEK reference number***

*Note: The Transcriber should retain a copy of this form.*

# Confidentiality Agreement



*For someone typing data, e.g. notes of interviews.*

**Project title:** 'Co-creating Hospitality Experiences at the Cellar Door

**Project Supervisor:** *Dr Heike Schanzel*

**Researcher:** *John Kelly*

---

- I understand that all the material I will be asked to type is confidential.
- I understand that the contents of the notes or recordings can only be discussed with the researchers.
- I will not keep any copies of the transcripts nor allow third parties access to them.

Typist's signature:.....

Typist's name:.....

Typist's Contact Details (if appropriate):

.....  
.....  
.....  
.....

Date:

Project Supervisor's Contact Details (if appropriate):

.....  
.....  
.....  
.....

***Approved by the Auckland University of Technology Ethics Committee on type the date on which the final approval was granted AUTEK Reference number type the AUTEK reference number***

*Note: The Typist should retain a copy of this form.*

Appendix E: Consent Forms

# Consent Form

For use when interviews are involved.



**Project title: ‘Co-creating Hospitality Experiences at the Cellar Door’**

**Project Supervisor: Dr Heike Schanzel**

**Researcher: John Kelly**

- I have read and understood the information provided about this research project in the Information Sheet dated (dd mmmm yyyy).
- I have had an opportunity to ask questions and to have them answered.
- I understand that notes will be taken during the interviews and that they will also be audio-taped and transcribed.
- I understand that I may withdraw myself or any information that I have provided for this project at any time prior to completion of data collection, without being disadvantaged in any way.
- If I withdraw, I understand that all relevant information including tapes and transcripts, or parts thereof, will be destroyed.
- I agree to take part in this research.
- I wish to receive a copy of the report from the research (please tick one): Yes  No

Participant’s signature:.....

Participant’s name:.....

Participant’s Contact Details (if appropriate):

.....  
.....  
.....  
.....

Date:

**Approved by the Auckland University of Technology Ethics Committee on type the date on which the final approval was granted AUTEK Reference number type the AUTEK reference number**

*Note: The Participant should retain a copy of this form.*