

**Identity Construction and its Influence on Wine Tourism  
Diversification Decisions: Case Study of Family Wineries in  
Langhe, Italy**

Thesis submitted in accordance with the requirements of the University of  
Chester for the degree of Doctor of Philosophy

by

Magali Canovi

July 2017

## **Declaration**

*The material being presented for examination is my own work and has not been submitted for an award of this or another HEI except in minor particulars, which are explicitly noted in the body of the thesis. Where research pertaining to the thesis was undertaken collaboratively, the nature and extent of my individual contribution has been made explicit.*

Magali Canovi

July 2017

# **Identity construction and its influence on wine tourism diversification decisions: Case Study of family wineries in Langhe, Italy**

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## **Abstract**

The aim of this thesis is to examine family wineries' wine tourism diversification decisions in terms of wine producers' self-constructions. The focus lies on understanding which motives drive family businesses' decisions to engage in diversification. A case study approach is adopted, using the Italian wine region of *Langhe* in Piedmont.

The dominant debates within the current literature have primarily concentrated on the economic-social dichotomy in relation to diversification decisions. It has been argued that diversification decisions are predominantly economically driven, highlighting the importance of profit maximisation and risk reduction. This thesis highlights the limitations of the economic-social dichotomy approach and argues for the need to take the social context into account when examining the decision-making process.

An interpretivist approach to research is adopted in order to extend current understandings of family businesses and their motives underlying diversification decisions. In line with the interpretivist perspective, this thesis uses discourse analysis (DA) as a methodological approach for analysing and interpreting wine producers' accounts. The findings reveal that by engaging in discourse about wine tourism diversification, wine producers construct a distinctive, coherent and desired sense of self, which in turn influences family wineries' decisions to diversification. In this instance, the concept of identity formation plays a central role in explaining family wineries' motives for diversification.

Linking wine producers' motives for diversification to their self-constructions provides a new insight into how family businesses engage in decision-making. Wine producers' discourses reveal that their decision-making processes are inextricably linked to sustaining a positive sense of self. Decisions are not only taken to achieve economic goals, but are likely to be influenced by deeper motives, notably wine producers' identity constructions. The main contribution of this thesis is that it advances understanding of family businesses' decision-making processes by developing a multi-layered conceptual framework to go beyond the economic-social dichotomy in order to reveal wine producers' semi-conscious and unconscious motives for diversification.

## Table of Contents

<b>ACKNOWLEDGEMENT</b>	<b>8</b>
<b>1. CHAPTER I – INTRODUCTION CHAPTER</b>	<b>9</b>
1.1. INTRODUCTION	9
1.2. RESEARCH PROBLEM	9
1.3. BACKGROUND TO RESEARCH	11
1.4. AIM AND OBJECTIVES	15
1.5. CONTRIBUTIONS	15
1.6. THESIS OVERVIEW	18
1.7. CHAPTER SUMMARY	21
<b>2. CHAPTER II - LITERATURE REVIEW CHAPTER</b>	<b>22</b>
2.1. INTRODUCTION	22
2.2. DIVERSIFICATION	23
2.2.1. AGRICULTURAL DIVERSIFICATION	24
2.2.2. TOURISM DIVERSIFICATION	26
2.2.3. MOTIVATIONS FOR DIVERSIFICATION	28
2.3. FAMILY BUSINESSES	32
2.3.1. SOCIOEMOTIONAL WEALTH	39
2.4. IDENTITY FORMATION	44
2.4.1. DIFFERENT PARADIGMATIC PERSPECTIVES	45
2.4.2. SOCIAL CONSTRUCTIONIST PERSPECTIVE	46
2.4.3. AGENCY AND STRUCTURE	49
2.4.4. IDENTITY WORK	52
2.4.4.1. Differentiating Identity Work	55
2.4.4.2. Aspirational Identity Work	58
2.4.4.3. Narrative Identity Work	58
2.4.5. IDENTITY REGULATION	61
2.4.5.1. Identity Regulation – Corporate Context	61
2.4.5.2. Identity Regulation – Agricultural Context	65
2.4.6. PLACE IDENTITY	68
2.5. CHAPTER CONTRIBUTION	72
<b>3. CHAPTER III – CASE STUDY CHAPTER</b>	<b>75</b>
3.1. INTRODUCTION	75
3.2. INTERNATIONAL WINE INDUSTRY	76
3.2.1. OLD WORLD VS. NEW WORLD WINE COUNTRIES	79
3.3. ITALIAN WINE INDUSTRY	83
3.3.1. HISTORY OF THE ITALIAN WINE INDUSTRY	84
3.3.2. DESIGNATION OF ORIGIN	86
3.4. LANGHE	88
3.5. WINE TOURISM	95
3.6. CHAPTER SUMMARY	98

<b>4. CHAPTER IV – METHODOLOGY CHAPTER</b>	<b>99</b>
<b>4.1. INTRODUCTION</b>	<b>99</b>
<b>4.2. NATURE OF SOCIAL SCIENCE</b>	<b>101</b>
4.2.1. ONTOLOGY – NOMINALISM	102
4.2.2. EPISTEMOLOGY – ANTI-POSITIVISM	103
4.2.3. HUMAN NATURE – VOLUNTARISM	104
4.2.4. METHODOLOGY – IDEOGRAPHIC ASSUMPTIONS	104
<b>4.3. NATURE OF SOCIETY</b>	<b>105</b>
<b>4.4. MULTIPARADIGMATIC APPROACH</b>	<b>106</b>
<b>4.5. METHODOLOGICAL CONSIDERATIONS</b>	<b>109</b>
4.5.1. CREDIBILITY AND DEPENDABILITY	109
4.5.2. REFLEXIVITY	110
4.5.3. GENERALISABILITY	111
<b>4.6. RESEARCH PROCESS</b>	<b>113</b>
4.6.1. PHASE 1 – LITERATURE REVIEW	114
4.6.2. PHASE 2 – CONTEXTUAL VISIT	115
4.6.3. PHASE 3 – DATA GENERATION	118
4.6.3.1. Translation	122
4.6.4. PHASE 4 – DATA ANALYSIS	124
4.6.4.1. Discourse Analysis	126
4.6.5. PHASE 5 – DATA GENERATION	130
4.6.6. PHASE 6 – DATA ANALYSIS	131
<b>4.7. ETHICAL CONCERNS</b>	<b>133</b>
<b>4.8. METHODOLOGICAL LIMITATIONS</b>	<b>134</b>
<b>4.9. CHAPTER SUMMARY</b>	<b>135</b>
<b>5. CHAPTER V – FINDINGS CHAPTER</b>	<b>137</b>
<b>5.1. INTRODUCTION</b>	<b>137</b>
<b>5.2. WINE TOURISM DIVERSIFICATION ACTIVITIES</b>	<b>138</b>
<b>5.3. WINE TOURISM DIVERSIFICATION DECISIONS</b>	<b>139</b>
5.3.1. ECONOMIC MOTIVES	141
5.3.2. SOCIAL MOTIVES	142
5.3.3. COMBINATION OF ECONOMIC AND SOCIAL MOTIVES	146
<b>5.4. WINE PRODUCERS' IDENTITY FORMATION</b>	<b>151</b>
5.4.1. IDENTITY WORK	151
5.4.1.1. Traditional Wine Producer	152
5.4.1.2. Entrepreneurial Wine Producer	157
5.4.1.3. Discursive Resources for Identity Work	161
5.4.1.4. Types of Identity Work	165
5.4.2. IDENTITY REGULATION	181
5.4.2.1. Identity Regulating Forces	182
<b>5.5. CHAPTER SUMMARY</b>	<b>195</b>
<b>6. CHAPTER VI – DISCUSSION CHAPTER</b>	<b>197</b>
<b>6.1. INTRODUCTION</b>	<b>197</b>
<b>6.2. MULTI-LAYERED CONCEPTUAL FRAMEWORK</b>	<b>197</b>
<b>6.3. SOCIOECONOMIC LAYER</b>	<b>199</b>

<b>6.4. FAMILY LAYER</b>	<b>204</b>
<b>6.5. IDENTITY LAYER</b>	<b>208</b>
6.5.1. TRADITIONAL WINE PRODUCER IDENTITIES	210
6.5.1.1. Identity Conflicts	211
6.5.1.2. Identity Work	213
6.5.2. ENTREPRENEURIAL WINE PRODUCER IDENTITIES	217
<b>6.6. POWER LAYER</b>	<b>222</b>
6.6.1. LOCAL WINE-PRODUCING COMMUNITY	223
6.6.2. TALK ABOUT FAMILY	224
6.6.3. PERCEPTION OF THE WINEMAKING PROFESSION	226
<b>6.7. CHAPTER SUMMARY</b>	<b>228</b>
<b>7. CHAPTER VII – CONCLUSION CHAPTER</b>	<b>230</b>
<hr/>	
<b>7.1. INTRODUCTION</b>	<b>230</b>
<b>7.2. EMPIRICAL CONTRIBUTIONS</b>	<b>231</b>
7.2.1. MOTIVATIONS FOR DIVERSIFICATION	231
7.2.2. SOCIOEMOTIONAL WEALTH	233
7.2.3. IDENTITY FORMATION	235
7.2.4. IDENTITY WORK	235
7.2.5. IDENTITY REGULATION	236
<b>7.3. THEORETICAL CONTRIBUTIONS</b>	<b>238</b>
<b>7.4. METHODOLOGICAL CONTRIBUTIONS</b>	<b>241</b>
<b>7.5. PRACTICAL CONTRIBUTIONS</b>	<b>242</b>
<b>7.6. LIMITATIONS</b>	<b>244</b>
<b>7.7. DIRECTIONS FOR FURTHER RESEARCH</b>	<b>245</b>
<b>7.8. CHAPTER SUMMARY</b>	<b>247</b>
<b>7.9. OVERALL CONCLUSIONS</b>	<b>247</b>
<b>APPENDIX 1</b>	<b>249</b>
<hr/>	
<b>VINEYARD LANDSCAPE OF LANGHE</b>	<b>249</b>
<b>PARTICIPATING FAMILY WINERIES</b>	<b>250</b>
<b>APPENDIX 2</b>	<b>253</b>
<hr/>	
<b>PARTICIPANT PROFILES</b>	<b>253</b>
<b>REFERENCE LIST</b>	<b>259</b>
<hr/>	

## **LIST OF FIGURES**

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Figure 1 –	Map of Langhe	16
Figure 2 –	Socioemotional Wealth Benefits	40
Figure 3 –	Consequences of Diversification	42
Figure 4 –	Conceptual Framework	74
Figure 5 –	Changes in the International Wine Industry	78
Figure 6 –	Global Wine Production – 2015	84
Figure 7 –	Map of Langhe	89
Figure 8 –	White Truffle Fair – 2016	90
Figure 9 –	Barolo Wine Production Area	92
Figure 10 –	Four Paradigms for the Analysis of Social Theory	100
Figure 11 –	NVivo Themes	125
Figure 12 –	Family Business Theme	126
Figure 13 –	Wine Tourists	143
Figure 14 –	Social Motives for Wine Tourism Diversification	150
Figure 15 –	Multi-layered Conceptual Framework	199
Figure 16 –	Wine Producer Identities – Continuum	209

## **LIST OF TABLES**

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Table 1 –	Disciplinary Rules – DOC/DOCG	87
Table 2 –	Research Phases	113
Table 3 –	Interview Questions – 1 <sup>st</sup> data collection Phase	120
Table 4 –	DA Tools and Techniques	128
Table 5 –	Interview Questions – 2 <sup>nd</sup> data collection Phase	131
Table 6 –	Wine Tourism Diversification Activities	138
Table 7 –	Motives for Wine Tourism Diversification	140
Table 8 –	Contrasting social and economic discourses	146
Table 9 –	Contrasting Table – Identity work	163
Table 10 –	Means of identity construction	166
Table 11 –	Identity regulating forces	184
Table 12 –	Talk about Family	186
Table 13 –	Wine Tourism Diversification and Identity Formation	195
Table 14 –	Types of Identity work	221

## **LIST OF VIGNETTES**

---

Vignette 1 –	Economic and Social Motives for Diversification	147
Vignette 2 –	Traditional Wine Producer Identity	152
Vignette 3 –	Entrepreneurial Wine Producer Identity	157
Vignette 4 –	Differentiating Identity work	175
Vignette 5 –	Identity work and Identity regulation	182

## **LIST OF PHOTOGRAPHS**

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Photograph 1 –	Winery Case 1 (Barolo)	91
Photograph 2 –	Commune of La Morra	94
Photograph 3 –	Commune of Serralunga d'Alba	94

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# 1. Chapter I – Introduction Chapter

## 1.1. Introduction

This thesis extends current understandings of family businesses diversification decisions through examining wine producers' self-constructions and the influence of these on family wineries' wine tourism diversification decisions. The main focus of this thesis lies on family businesses' motivations for diversification in order to understand which motives drive family businesses' decisions to engage in diversification. The Italian wine region of *Langhe* in Piedmont is used as case study to examine family wineries' decisions to diversify into wine tourism.

In order to examine family businesses' diversification decisions a number of core research themes run throughout this thesis, notably diversification, motivations for diversification, family businesses, socioemotional wealth, and identity formation. Furthermore, context plays a major role in this thesis and it is argued that the social, historical and family context is likely to influence diversification decisions. Consequently, the introduction chapter will first of all outline the research problem as well as the background to this research, before stating the aim and objectives of this thesis. Furthermore, the contributions of this thesis will be highlighted and an overview of the different chapters provided.

## 1.2. Research Problem

The essential problem being discussed in this thesis relates to diversification and why family businesses decide to diversify. Particularly, this thesis is concerned with family wineries' engagement in wine tourism diversification. Why and for what reasons do family wineries decide to engage or resist wine tourism diversification? The purpose of this thesis derives from the principal

debates within the agricultural and family business literatures regarding farmers' and family members' motivations for diversification. This thesis contributes to these debates within the literature through providing new insights into family businesses' diversification decisions, so that more will be known about the motives underlying these decisions to engage in diversification. Accordingly, wine producers' motives for engaging or resisting diversification constitute a central theme of this thesis.

As will be highlighted in the literature review chapter (see chapter II), diversification, notably tourism diversification is depicted as an efficient catalyst for the development and regeneration of rural areas at the national and regional level. Similarly, at the local level, diversification is recognised as a beneficial strategy for increasing individual farmers' revenues. However no consensus has been reached regarding the motives underlying diversification decisions. The current debates within the agricultural and family business literature are predominantly focusing on the economic-social dichotomy in understanding and explaining diversification decisions. The literature predominantly adopts a profit-maximisation approach and reveals that farmers' motives for and motivations towards diversification are economically driven, in order to generate additional income. However, having met the wine producers and engaged in face-to-face interaction, it became evident that family wineries' diversification decisions constitute a complex interplay between both economic and social motives.

Consequently, this thesis challenges this profit-maximisation perspective, highlights the limitations of the economic-social dichotomy and argues for the need to provide a more encompassing view on farmers' motives for diversification. While the agricultural literature assumes that the majority of farmers diversify for economic reasons, the question as to why other farmers choose to resist diversification has not yet been addressed within the literature. Consequently, this case study will address this gap through advancing understandings of wine producers who resist and oppose, as well as embrace and pursue wine tourism diversification. This allows for an

increased understanding of the complexity of motives underlying family businesses' diversification decisions.

Furthermore, the case study of Langhe provides the context for examining producers' wine tourism diversification decisions. This case study is of particular importance due to the fact that Langhe is still situated at the development stage of the tourist area cycle of evolution (Butler 1980). Over the past decade Langhe has developed as a wine tourism destination and has become increasingly popular on an international basis. The area has witnessed a continuous increase in tourism numbers (see chapter III). Increasingly, wine producers recognise the potential benefits from wine tourism development at the regional and local level and started to diversify into wine tourism. This is achieved through investing in and developing a number of tourism activities at their winery.

Consequently, this thesis is predominantly concerned with examining the reasons for and motivations for wine tourism diversification in order to reveal if wine producers motives are merely economic in nature or if other, deeper/unconscious motives drive family wineries' decisions to engage in wine tourism diversification. The following section will briefly outline the core themes of this thesis, while the literature review chapter provides an in depth examination and extended discussion of these research themes.

### **1.3. Background to Research**

A number of key research themes will run throughout this thesis notably diversification, motivations for diversification, family businesses' preservation of socioemotional wealth, identity formation, identity work and identity regulation. These key research themes will be examined in depth in the literature review chapter (chapter II) and discussed in relation to wine producers' discourses in the findings chapter (chapter V) as well as in the discussion chapter (chapter VI). This section provides a brief overview of the core themes of this thesis. First of all 'diversification' and 'motivations for

diversification' are recognised as central themes of this thesis. Diversification refers to the expansion and development of a company's activities through adding new products, services or markets (Eukeria and Favourate 2014). The following review of the literature (chapter II) will establish that no consensus has been reached regarding a definition of the concept of diversification (Hansson et al. 2013). Besides the notion of diversification, numerous concepts have emerged within the agricultural literature, all having similar, if not identical meanings including 'part-time farming', 'multiple job holding farm', 'other gainful activities' and 'pluriactivity' (Lopez-i-Gelats et al. 2011, p.784).

Researchers generally agree that diversification is a successful survival strategy, leading to a number of benefits for farmers and farm businesses (Alsos and Carter 2006; Barbieri et al. 2008; Lopez-i-Gelats et al. 2011). It is argued that these benefits are predominantly economic in nature, due to the fact that diversification is able to avoid uncertainty and reduce the risk of the overall return. Similarly from a tourism perspective, tourism diversification has increasingly been recognised as an efficient catalyst for the development and renaissance of rural areas on a regional level (Sharpley and Vass 2006). On a local/societal level it has been argued that tourism diversification is likely to lead to employment creation and retention, generation of additional income as well as farm support (OECD 1994; Sharpley 2002a, 2002b). However, as the review of the literature will demonstrate, a number of researchers dispute/contest these arguments and note the marginal benefits for farmers and their families when engaging in diversification (e.g. Hjalager 1996; Opperman 1996).

Besides highlighting the positive and negative effects of tourism diversification at a regional and local level, one of the main debates within the agricultural and family business literature relates to farmers' and family members' motivations for diversification. In this instance, 'motivations for diversification' is identified as a major research theme running throughout this thesis. When discussing motivations for diversification, this thesis is interested in understanding why wine producers and their families engage in wine tourism diversification. Motivations for diversification have largely been addressed in

the agricultural literature, with the majority of researchers agreeing that farmers are primarily driven by economic motivations for diversification. Only a limited number of researchers highlight the importance of social motivations for diversification. This financial/profit-maximisation approach to researching motivations for diversification is criticised, as it does not consider the context-dependence of individuals' motivations for diversification.

However, from a family business perspective, motivations for diversification have been linked to the family context, highlighting the importance of the family in the management of the business. In this instance, it has been argued that when diversifying, family businesses are not primarily concerned about and motivated to attain financial goals, but value nonfinancial/social goals. Consequently, it is argued that while the agricultural economics and family business perspectives have not been able to reach a consensus on farmers' and family members' motivations for diversification, a more refined approach is needed to contribute to the dominant debates within the literature and extend current understandings. This thesis provides such an alternative through adopting a layered approach in order to go beyond the economic-social dichotomy in examining the complexity of motivations for diversification decisions.

Through adopting a layered approach this thesis is able to reveal deeper, subconscious motives for diversification, besides outlining wine producers' economic and social motives. In this instance, the concept of identity formation was found to play a central role in explaining subconscious motives for diversification. It is argued that identity influences wine producers' behaviour and decision-making process. Family businesses' decision-making processes are inextricably linked to sustaining a positive sense of self. Decisions are not only taken to achieve economic goals, but are likely to be influenced by deeper motives, notably wine producers' identity construction. Consequently, 'identity formation' constitutes another core theme of this thesis, and is able to provide a new insight into how family businesses engage in decision-making.

The notion of identity has received considerable attention within the management and organisation literature and is conceptualised as “the meanings that people attach reflexively to themselves in response to questions such as ‘who am I?’ and ‘who do I want to be in the future?’” (Brown and Coupland 2015, p.1316). Linking the concept of identity to the rural, farming context, the agricultural literature has mainly explored whether farmers’ engagement in diversification leads to changes, tensions and conflicts in their occupational identities, or whether farmers’ occupational identities are resistant to such changes (Brandth and Haugen 2011; Groth et al. 2015; Siti-Hajar et al. 2015). This thesis extends this discussion on identity and diversification decisions through drawing on the dominant discussion of agency and structure within the organisation and management literature. The process of identity construction is depicted as a complex interplay between agency and structure, underlining individuals’ agential role in constructing their self-identities (identity work) as well as the importance of social structures and discourses shaping their identities (identity regulation) (Kuhn 2006; McInnes and Corlett 2012; Stenholm and Hytti 2014). Consequently, while the majority of researchers appear to assume that farmers are powerful agents when constructing their identities and engage in agential identity work, this thesis argues that social structures play a major role in regulating individuals’ identities and thus influencing their behaviour and decision-making process.

These current debates relating to the core research themes of this thesis are examined and discussed in greater depth in the following chapter. After having outlined the research problem and background to this research, the following section will delineate the aim and objectives of this thesis.

## **1.4. Aim and Objectives**

The first part of the introduction chapter has outlined the research problem as well as the current debates within the literature. In order to contribute to these debates and extend current understandings, this thesis aims:

To examine family wineries' wine tourism diversification decisions in terms of wine producers' self-constructions

In order to achieve this research aim, three objectives have been set:

To analyse the prevailing debates within the diversification and family business literatures in order to reveal the different factors influencing diversification decisions

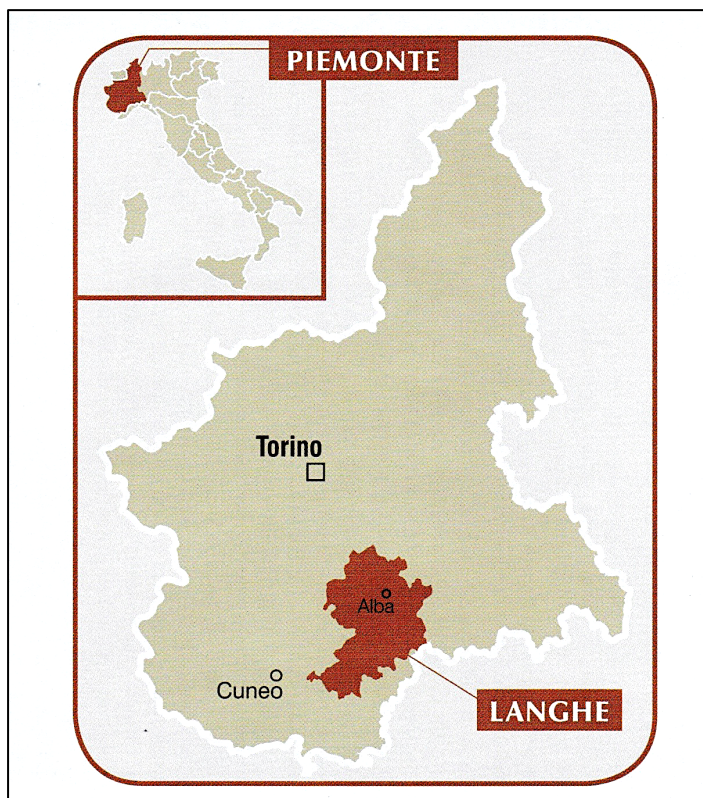
To examine the concept of identity formation in understanding wine producers' diversification decisions

To explore the motives underlying family wineries' decisions to diversify into wine tourism

## **1.5. Contributions**

As stated in the previous section on the research problem, this thesis is concerned with analysing diversification decisions and more importantly examining why family businesses engage in wine tourism diversification. Through exploring the motives underlying family wineries' decisions to diversify into wine tourism, this thesis contributes to the body of knowledge in various ways. The first part of this section outlines the empirical and practical contributions, before examining the more widely applicable theoretical contributions.

It is argued that this thesis contributes to the body of knowledge of the case study area due to the fact that only limited attention has been paid to the Italian region of Piedmont and more precisely to the wine-producing area of Langhe. Langhe is situated in the southern part of the Piedmont region (see figure 1) and is of particular interest for this thesis, as it is one of the highest quality wine producing areas in Italy. The region has only recently undergone a number of changes, most importantly, the recent development of the wine tourism industry. Over the past decade, Langhe has continuously developed its tourism industry and has become a popular tourism destination, gradually attracting tourists from around the world. The region has become increasingly famous for the local food and wine culture. The high point for tourism development was in 2014, when a number of vineyards in Langhe were inscribed on the UNESCO World Heritage List (see chapter III).



**Figure 1 - Map of the Langhe area**

(Albeisa – La Carta dei Vini di Langa e Roero)



Although the wine-producing region has received international recognition for the quality of its wines and attracts an increasing number of tourists, research in this region remains limited. Research topics relating to the development of the wine tourism industry in Langhe, local residents' attitudes and perceptions of wine tourism, as well as the implications and impacts of wine tourism development, remain largely unexplored.

Furthermore, this research has potential practical implications, notably for investment appraisals at the micro level, as well as for the regeneration of rural areas through tourism at the macro level. Understanding the motives underlying family wineries' decisions to diversify into wine tourism can have wider impacts on the local economy, society and future tourism development initiatives.

After having outlined the empirical and practical contributions of this thesis, this section examines the more widely applicable theoretical contributions. This thesis contributes to the current debates within the agricultural and family business literatures, relating to farmers' and family members' diversification decisions and extends current understandings of how these decisions are influenced by individuals' self-constructions. This thesis goes beyond the economic-social dichotomy approach for explaining motivations for diversification – largely adopted in the agricultural and family business literatures – in order to gain a deeper understanding of the reasons/motives for diversification. The findings of this study provide a new insight and an encompassing explanation for wine tourism diversification decisions, through adopting a layered approach and developing a multi-layered conceptual framework and thus contributing to the tourism, agricultural and family business literatures. A layered approach has not yet been adopted for examining diversification decisions. The multi-layered framework will be outlined in chapter VI and is able to reveal wine producers' semi-conscious and unconscious motives for diversification. While research within the areas of agriculture and family business have predominantly examined farmers' and family members' conscious motives for diversification, this thesis goes a step

further and reveals wine producers' semi-conscious and unconscious motives for diversification.

Finally, from a methodological point of view, this thesis is able to contribute to the literature on family business diversification, currently dominated by functionalist assumptions about social science. An interpretivist approach to research is adopted in order to extend current understandings of family businesses and their motives underlying diversification decisions. In line with the interpretivist perspective, this thesis uses discourse analysis (DA) as methodological approach for analysing and interpreting wine producers' accounts. Within the family business and agriculture literatures, DA remains a largely under-utilised methodological approach. While the dominant functionalist approaches have been predominantly employed to present principal dimensions of the motivations for diversification (see Barberi and Mahoney 2009; McGehee and Kim 2004), the DA approach used in this thesis allows for a deeper understanding of the phenomenon under study. DA takes wine producers' social, historical, and family context into account, and thus enables the emergence of semi-conscious and unconscious motives for diversification.

Consequently, this thesis is able to move forward the discussion on motivations for diversification through adopting an interpretivist perspective and obtaining in-depth knowledge from interacting with wine producers. After having discussed the various contributions of this thesis to the body of knowledge of diversification decisions, the final section will provide an overview of the different chapters of this thesis.

## **1.6. Thesis Overview**

This thesis is divided into 7 chapters – including the introduction chapter –, which will be outlined below:

## Chapter II – Literature Review Chapter

In order to determine the motives underlying family wineries' diversification decisions, the literature review chapter focuses on a number of core research themes, notably diversification, motivations for diversification, family businesses, socioemotional wealth, identity work, and identity regulation. The chapter analyses and critically evaluates the current debates within the literature relating to these core research themes. Furthermore, potential gaps within the literature are revealed and discussed, as well as how this thesis tries to address these gaps and contributes to the current debates within the literature.

## Chapter III – Case Study Chapter

This chapter examines the case study area of Langhe. Current trends and changes within the international wine industry are discussed, distinguishing between new world and old world wine countries, with a particular focus on the Italian wine industry. Furthermore, the chapter explores the continuous tourism development in Langhe, outlining one of the most famous villages and wines in Langhe, notably Barolo. The recent trends in relation to Langhe's wine tourism industry are discussed as well as the importance of wine tourism for the local wineries.

## Chapter IV – Methodology Chapter

This chapter reveals the methodological approach adopted to conduct this research, including the philosophical assumptions underpinning this thesis to achieve its aim and objectives. The six phases of the research process are outlined, notably (1) review of the current literature, (2) contextual visit, (3) data generation, (4) data analysis, (5) followed by a second data generation and (6) analysis phase. Furthermore, ethical concerns and methodological limitations are addressed.

## Chapter V – Findings Chapter

Through engaging in thematic and discourse analysis, the findings present and interpret wine producers' accounts in relation to wine tourism diversification. The core themes of this thesis are addressed in the findings chapter, using vignettes and contrast tables/matrices to display and thereby enable understanding of the data. The findings reveal that diversification decisions constitute a complex interplay between social and economic motives for diversification and are inextricably linked to and influenced by the construction of wine producers' identities.

## Chapter VI – Discussion Chapter

The discussion chapter adopts a layered approach in order to gain a deeper understanding of the motives underlying family wineries' decisions to diversify into wine tourism. The chapter outlines the multi-layered conceptual framework of wine tourism diversification motives, discussing wine producers' conscious, semi-conscious and unconscious motives for wine tourism diversification. Each layer of the conceptual framework is examined and discussed in turn, which allows for a holistic and integrated understanding of diversification decisions to be established.

## Chapter VII – Conclusion Chapter

The final chapter brings this thesis to a conclusion through reemphasising the main empirical findings in relation to the aim and objectives of this thesis. The chapter reveals the theoretical and methodological implications and contributions of the findings in deepening current understandings of family businesses' motives for diversification. Finally, the chapter outlines potential limitations and offers various directions for further research.

## 1.7. Chapter Summary

This chapter introduced the main purpose of this thesis and set the scene for the chapters to follow. Having outlined the research problem and background to this research, this thesis is concerned with examining family businesses' diversification decisions. The aim and objectives of this thesis have been delineated, as well as the main contributions to the body of knowledge of family business diversification. Adopting a case study approach, the Italian wine region of *Langhe* in Piedmont is used to examine family wineries' decisions to diversify into wine tourism. The following chapter (literature review chapter) will address the first objective of this thesis through presenting the dominant debates within the current literature regarding family business diversification and examining and discussing the core research themes of this thesis.

## **2. Chapter II - Literature Review Chapter**

### **2.1. Introduction**

This thesis is concerned with examining the motives underlying family businesses' decisions to diversify their business. The literature review chapter addresses the first objective of this thesis and examines the dominant debates within the current literature regarding family business diversification. In order to understand and be able to determine the motives underlying family businesses' decisions to engage in diversification, the literature review chapter will focus on a number of core themes, notably family businesses, the understandings of diversification itself, motivations for diversification, socioemotional wealth, identity formation, identity work, and identity regulation.

The first part of this chapter will focus on the concept of diversification, highlighting the different levels of explanation and interpretation of the concept within the different literatures. It is argued that within the agricultural and family business literatures, diversification is interpreted at the individual level, focusing on the perspective of individual farms and family businesses, whereas the tourism literature predominantly examines diversification from the perspective of the local economy and society. Furthermore, with regards to the second core theme of 'motivations for diversification', the review of the literature reveals the predominant profit-maximisation approach adopted within the agricultural economics literature. The second part of this chapter examines motivations for diversification from a family business perspective. In this instance, the family business literature challenges the profit-maximisation approach and emphasises the need for taking family businesses' socio-cultural context into account, revealing the predominance of social motivations for diversification. Consequently it is argued that these literatures have not been able to reach a consensus regarding businesses' motivations for diversification.

As this thesis aims to extend current understandings of family wineries' diversification decisions and motivations, the third part of this chapter will take the discussion on family businesses' motivations for diversification a step further and introduce the concept of identity. Only a limited number of researchers within the family business and agricultural literatures have linked individuals' self-identities to the process of diversification. In this instance, it is argued that family businesses' diversification decisions are inextricably linked to family members' self-constructions, in other words, to their sense of selves or their identities. Therefore, the notions of identity work and identity regulation are analysed and their complex interplay in the process of identity formation is revealed.

## **2.2. Diversification**

The first part of the literature chapter focuses on two of the core research themes, notably 'diversification' and 'motivations for diversification' and examines these themes within an agricultural context. The lack of a unanimous and accurate definition of the concept of diversification within the agricultural literature is revealed, before examining and discussing the concept from the conventional lens of economic effectiveness, linking diversification directly to firm performance. Furthermore, attention is paid to one particular type of diversification, relevant for this thesis, notably tourism diversification. It is argued that the tourism literature predominantly examines rural tourism diversification from the perspective of the local economy and society (see for example Gössling and Mattsson 2002; Sharpley 2002a; Sharpley 2002b). Therefore tourism diversification is perceived as an efficient catalyst for the development of rural areas. Finally, motivations for diversification are examined from an agricultural perspective, highlighting the predominance of farmers' financial/economic motives for diversification.

### **2.2.1. Agricultural Diversification**

Diversification refers to the expansion and development of a company's activities through adding new products, services or markets (Eukeria and Favourate 2014). It is referred to as an investment strategy or corporate strategy to respond to changes in the external environment and/or manage uncertainties caused by these changes (Culas and Mahendrarajah 2005; Eukeria and Favourate 2014). No generally agreed upon conceptualisation has been provided to date (Eukeria and Favourate 2014; Hansson et al. 2013). The profit-maximisation approach refers to diversification as "a strategic option used by managers to improve their firm's performance" (Eukeria and Favourate 2014, p.182).

While no consensus has been reached regarding a definition of the concept, throughout the years, different concepts have emerged within the agricultural literature, all having similar, if not identical meanings, including 'part-time farming', 'multiple job holding farm', 'other gainful activities' and 'pluriactivity' (Lopez-i-Gelats et al. 2011). Other researchers used the concept of 'alternative farm enterprises', meaning diversified farms (Bowler et al. 1996; Damianos and Skuras 1996; Daskalopoulou and Petrou 2002). For McNally (2001) the umbrella term is pluriactivity, where diversification is only one part of pluriactivity. Some researchers include in their definition the development and creation of new agricultural and non-agricultural products (Shucksmith and Winter 1990), whereas other researchers believe that diversification is predominantly concerned with the production and development of non-agricultural activities (Bradshaw 2004), thus including both products and services into the definition.

Additionally, some researchers refer to diversification as 'on-farm use of resources' (Shucksmith and Winter 1990), whereas other researchers include on-farm as well as off-farm activities into their definition of the concept (Lopez-i-Gelats et al. 2011). Clark for example defined diversification as "the creative use by farmers of diverse local assets and attributes rather than 'imported' technologies as the basis of alternative activities, leading to financial gain"



(Clark 2009, p.217-218). This definition highlights the direct link between diversification and financial effectiveness. Diversification is also referred to as a farm adaptation strategy, a risk reduction strategy (Anosike and Coughenour 1990) or a risk management strategy (Meraner et al. 2015). McNally (2001) highlighted the necessity of farm businesses to diversify in order to reduce their reliance on agricultural production and thus generate extra income. Consequently, with regards to this study, wine tourism diversification is not only conceptualised as a profit-maximisation and risk reduction strategy, but also as the development and investment in non-agricultural products and services, using on-farm resources. After having examined the different conceptualisations of diversification within the agricultural literature, the following section will highlight the potential benefits of diversification within an agricultural context, focusing on the individual farm level, before examining diversification from a tourism perspective, focusing on the local/societal level.

There is a widely held belief within the agricultural literature that diversification is a successful survival strategy for farmers and farm businesses (Alsos and Carter 2006; Barbieri et al. 2008; Lopez-i-Gelats et al. 2011). Some authors argue that diversification is able to avoid uncertainty and reduce the risk of the overall return through developing and adopting additional, mostly unrelated farm business activities (Culas and Mahendrarajah 2005). Agricultural risks, which are assumed to be reduced or limited due to diversification include “production risks (i.e. changing production conditions associated with changing weather conditions resulting in fluctuating yields), market risks (i.e. changing market conditions associated with changing prices or business cycles), and regulatory or institutional risks (i.e. changes in agricultural policies)” (Meraner et al. 2015, p.768).

Furthermore, researchers have tried to establish a link between farm/farmers’ characteristics and the level and likelihood of diversification. Socio-demographic, farm and geographical characteristics have an impact on the level of diversification. A number of researchers for example have identified a positive link between the numbers of active family members (e.g. size of

household) and the probability and level of diversification (Damianos and Skuras 1996; McNally 2001; Weiss and Briglauer 2000). Similarly, the age of the main farm operator is positively correlated to agricultural diversification (Meraner et al. 2015). It is thought that the level and probability of diversification decreases with the age of the farmer. Younger farmers tend to diversify more, whereas older farmers are generally more reluctant to diversify (Mishra et al. 2004). With regards to the farm size and the level of diversification, researchers have conducted various case studies and determined a positive link between farm size and agricultural diversification (Culas and Mahendrarajah 2005; Ilbery 1991; Meraner et al 2015; Weiss and Briglauer 2000). For example Ilbery (1991) found a positive correlation between farm size/farm type and diversification. His results show the tendency of larger farms to favour diversification. However, it could be argued that modelling the relationship between farm/farmer characteristics and diversification is too simplistic and that the conventional approach to diversification tends to ignore the social and cultural context. This thesis emphasises the importance of context in relation to family businesses' diversification decisions. Consequently, with regards to this research, the tourism context plays a major role in relation to diversification and will be examined in the following section.

### **2.2.2. Tourism Diversification**

The tourism literature predominantly examines diversification from a local/societal perspective and recognises tourism diversification to be an efficient catalyst for the development and renaissance of rural areas (Sharpley and Vass 2006). It has been argued that the principal justification for diversifying into tourism is its contribution to the rural economy, notably, employment creation and retention, generation of additional income as well as farm support (OECD 1994; Sharpley 2002a, 2002b). Additional benefits are socio-cultural development, environmental and resource conservation and improvement.

Sharpley and Vass (2006) identified in their study on farm tourism diversification in north-eastern England a number of factors leading to tourism diversification, notably economic need for diversification, demographic and lifestyle factors, support of the public sector, geographical characteristics of the farm as well as farmers' perceptions of tourism as a viable diversification option. Similarly, Comen and Foster (2006) established in their research a direct link between the success of diversification and a number of factors, including the farm's location, strong connection with the local community, strong social skills, and a passion for learning. Ilbery et al. (1998) noted that tourism ventures are considered the most popular diversification strategies in the northern Pennines.

While tourism diversification is increasingly adopted as a strategy to improve the economic, social, political and environmental situation of rural areas and is seen as a development panacea (Ilbery et al. 1998; Sharpley 2002a; 2002b), a number of authors identified challenges and problems relating to tourism diversification (e.g. Hjalager 1996; Opperman 1996). These challenges will be outlined below.

Opperman (1996) conducted his research on rural tourism in southern Germany and identified that farmers and tourism operators only benefitted marginally from tourism diversification. The respondents stated that they earn only a small additional income from tourism accommodation compared to the time and money they have invested. Furthermore, Opperman identified that high seasonality as well as financial and legal constraints hinder the successful diversification into tourism. Similarly, Hjalager (1996) demonstrated in her study of farm tourism diversification in Denmark, that farmers', as well as politicians' expectations are far too high and have not been met so far. Farmers were disappointed with the development of tourism as they encountered far more problems than expected. Respondents identified lack of training and counselling as well as marketing problems as major issues when setting-up their new venture. Furthermore, they do not believe that tourism will create new employment, but only reallocate family work, hence women will take care of the tourism business, whereas men

continue work on the farm. In this case it could be argued that the author intended to demonstrate that tourism diversification does not lead to the regeneration of rural areas, but was adopted by farm families to create employment for family members, primarily for the women in the family. Gender relations in family businesses and more particularly in family wineries will be further examined in chapter VI (discussion chapter) in relation to wine tourism diversification.

Besides highlighting the positive and negative effects of tourism diversification for farm businesses and rural areas, numerous agricultural research studies have focused on farmers' motivations/motives to/for diversification. The following section will examine the current debates within the agricultural literature regarding farmers' motivations for diversification.

### **2.2.3. Motivations for Diversification**

The majority of studies on farmers' motivations for diversification have led to the conclusion that these motivations are predominantly economically driven and directly related to economic benefits, performance and profits. The main economic reasons for diversification are believed to be generation of additional income (Barbieri and Mahoney 2012; McGehee and Kim 2004), long-term security in farming (Sharpley and Vass 2006) and employment for family members (Nickerson et al. 2001). Weaver and Fennell (1997) conducted a study on the vacation farm sector in Saskatchewan, Canada, where financial motivations dominated. Similar findings were presented in Sharpley and Vass's (2006) English case study on farm diversification into tourism. Barbieri and Mahoney (2009) revealed in their research on farm diversification in Texas, that additional income was the most important goal for farmers when diversifying. Correspondingly, Bowler et al. (1996) note that farmers' inspirations for the development of an alternative farm enterprise (AFE) were predominantly economic in nature. Maintaining or increasing their income was the principal motivation for farmers. Similarly, within a wine tourism context, researchers generally agree that wine producers' motivations

for diversification are predominantly economic in nature. It is assumed that wine tourism diversification is a short-term, beneficial strategy to increase cellar-door sales (Charters and Menival 2011; Tomljenovic 2012). While wine tourism diversification might be considered an additional sales opportunity for wine producers, it has also been recognised as an increased distraction in relation to wine producers' core business (Beames 2003).

Nevertheless, a number of researchers within the agricultural literature have revealed various social motivations, such as closer contact with customers, (Hansson et al. 2013), pursuing a rural lifestyle, and/or socialising and educating visitors (Barbieri 2010). Getz and Carlsen (2000) conducted a study on the motivations of family tourism and hospitality businesses in rural Western Australia and revealed that 'living in the right environment' and 'enjoying a good lifestyle' were by far the most important motivating factors.

Due to the complexity and the interrelated nature of personal, social and economic motivations, even those studies where economic motivations for diversification prevail, researchers note that one should not disregard the importance of the social/personal motivating factors. They concur that farmers possess a mixture of motivations ranging from 'enhancement of quality of life', 'continuance of farming' to 'challenge/stimulus' and 'living in the right environment' (Barbieri and Mahoney 2009; Getz and Carlson 2000), while still emphasising the predominance of the economic motivations for diversification.

When examining motivations for diversification within an agricultural context, it has been argued that research concentrated largely on the farms that have diversified and overlooked the ones that resisted and opposed diversification (Northcote and Alonso 2011). Traditionally, researchers argue that the motivations not to engage in farm diversification are predominantly linked to attributes such as lack of capital, location (Northcote and Alonso 2011), farmers' lack of skills (Burton 2004), tenancy restrictions and land-use planning controls (Ilbery 1991). However, there is little knowledge about how the motives differ between diversified and non-diversified farmers in situations where few, if any, of the above constraints apply. This thesis will address this

gap in the literature, through including family wineries, which resist and oppose wine tourism diversification.

If, as the literature has demonstrated, the majority of farmers diversify for economic reasons (e.g. establishing a positive link between diversification motivations and financial performance), why do other farmers choose to resist diversification? It could be argued that adopting a financial approach to researching motivations for diversification does not consider the social and cultural context of farmers and their families. Accordingly, as the introductory chapter established, context plays a major role throughout this thesis and it is argued that the social, historical and family context is likely to influence diversification decisions. Similarly, Hansson et al. (2013) referred to motivations as being context-dependent, meaning that farmers' motivations are dependent on the context of the farm and the farm family, which have to be taken into consideration. The authors further emphasised the lack of attention within the current agricultural literature on the context-dependent motivations underlying farmers' decisions to diversify. Consequently, this thesis argues that in order to determine the motives underlying family wineries' decisions to diversify into wine tourism, the context has to be taken into consideration.

After having examined the dominant debates within the agricultural literature regarding farmers' economic and social motivations for diversification, some researchers go a step further and explore the extent to which farmers' initial social and/or economic motivations have been achieved after the diversification process. Barbieri (2010) for example, undertook a study to investigate which motivations/goals of diversification have actually been achieved. The author argued that the extent to which farmers have reached this complex set of social and economic goals has only received limited attention within the literature and has not yet been established. Her study revealed that personal and social goals are highly accomplished after the diversification process, whereas economic drivers (e.g. additional income) showed much lower levels of accomplishment, even though they were ranked as most important.

It can be reasoned that the extent to which the initial motivations (e.g. economic or social) have been achieved is inextricably linked to farmers' attitudes after diversifying into tourism. However, only limited attention has been paid to farmers' attitudes and reactions after having diversified into tourism (Sharpley and Vass 2006). One exception is Sharpley and Vass (2006), who studied farmers' attitudes after diversification in the Northumbria and Yorkshire region. Their research revealed that around 60% of participants "were unsure or agreed that they would have preferred not to have diversified into tourism" (p.1046). They further stress the importance of farming remaining their main activity, as "their role is to provide food for the nation" (p.1047). In this instance, it could be argued that tourism diversification is interfering with farmers' main activities and their professional identity. The concept of identity and farmers' multiple and sometimes conflicting identities after the diversification process will be discussed in more depth in the third part of this chapter, notably in the sections on identity work and identity regulation.

This section has examined the concept of diversification and outlined the current debates within the literature on agricultural, tourism and wine tourism diversification. The mainstream approach has been revealed, highlighting the prevalence of economic/financial motives for diversification. However some researchers have criticised this profit-maximisation approach, emphasising the need to consider the social context and highlighting the context-dependency of farmers' motivations for diversification (e.g. Hansson et al. 2013). It has been argued that in order to get a better understanding of farmers' motivations to diversify and/or reasons not to diversify a more in-depth approach focusing on individual families' experiences and meanings is needed to reveal the underlying assumptions influencing diversification decisions.

While this section has discussed diversification motives from an agricultural economics perspective, the following section will examine diversification decisions and motives from a family business perspective. The mainstream view on family businesses is challenged and its limiting and taken-for granted assumptions are revealed.

### **2.3. Family Businesses**

Family businesses have received increased attention from researchers and are acknowledged to be of major importance for the world economy. They dominate the current business environment and employ over 80% of the workforce (DeTienne and Chirico 2013). Within the Italian context, family businesses represent more than 85% of the total number of businesses, creating about 70% of employment in the country (AIDAF – Associazioni Italiana delle Aziende Familiari n.d.). Similarly, it has been argued that within Europe, 60% of all companies are family-owned. What differentiates Italy from other countries in Europe is the fact that about 66% of Italian family businesses are fully managed by members of the family compared to 26% in France and 10% in the UK (AIDAF, n.d.). However, these figures are to be considered with care, as it is important to note that “there is still a lack of robust data”, which is likely to lead to “inaccurate assumptions” (European Commission 2009, p.12). Nevertheless, Italian family businesses are a key component and source of economic development, employment and contribution to the country’s GDP (AIDAF n.d.; Zahra et al. 2004).

Therefore, it is not surprising that family businesses and their particular management structures and processes have received increased attention from researchers around the world (Sharma et al. 2012). Fundamentally, family business research developed during the 1980s and 1990s (Nordqvist and Melin 2010; Wilson et al. 2014), and initially focused on examining and analysing family businesses’ processes of managing their legacy and continuity and how to ensure survival through family succession (Nordqvist and Melin 2010). Family business research has been integrated into various



disciplines including accounting, economics, organisational behaviour, entrepreneurship, sociology, psychology and strategic management (Habbershon and Williams 1999). It could be argued that this multidisciplinary effort is the reason why to date no consensus amongst researchers has been reached in defining what constitutes a family business. No single definition of a family business has been accepted within the literature (Gonzalez et al. 2012).

However certain researchers seem to agree that a business has to meet various criteria in order to be considered and classified as a family business. Family businesses need to be managed and/or governed by family. Once family members are appointed to executives and largely constitute the board of directors, it is argued that the firm is governed by a dominant family coalition. The concept of dominant coalition plays a central role throughout this thesis and highlights the importance of the family in the management of the winery. In this instance, it is argued that the family as dominant coalition needs to have a clear vision for the future of the business, and they need to be potentially sustainable over multiple generations (Chua et al. 1999; Kellermanns et al. 2008). Some researchers adopt a slightly different perspective and believe the degree of family ownership of the business to be of major importance. Thus these authors argue that the business not only needs to be managed but also owned by the family (Olson et al. 2003). They believe that one or the other is not enough to be considered a family business.

With regards to this thesis it is important to note that family wineries in this case study are both owned and managed by members of the same family. This situation seems to be relatively typical for family business in Italy in general and family wineries in the Langhe area in particular. The Italian wine sector is dominated by family businesses (Broccardo et al. 2015). Ownership, management and control are united in small, medium and large-sized Italian family businesses (Colli and Rose 1999). Leading Italian family businesses in various sectors, including the car manufacturing, textile, chemicals, electricity, banking and insurance, and food and wine sectors are predominantly family owned and controlled (Colli and Rose 1999). In contrast, Brundin and Wigren-

Kristoferson (2013) revealed in their research on family wineries in South Africa that in some family wineries ownership and management was separate. The family owned the winery, however it was governed by outside managers. Even though the reasons for this choice were not specified in their study, it could be argued that this is due to personal choices of family members who might not be interested in taking over the winery or want to follow different career paths. These family wineries where ownership and management are separate are predominantly seen as an asset of the family (Brundin and Wigren-Kristoferson).

The dominant research approach involves researchers attempting to compare and establish links between family businesses and non-family businesses. There is a general consensus amongst researchers that family businesses are unique due to a number of family features included in the business (Daugherty 2013). These family features are referred to in the literature as the 'family system'. It is believed that the family system interacts with/influences the business system and either leads to increased or reduced firm performance and profits. Thus, a direct relationship is assumed between family features and firm performance. No agreement exists within the literature whether the family system positively or negatively influences the business system. Some researchers argue that the two systems are inextricably linked and establish a positive relationship between family features and firm performance (e.g. Laforet 2016; Schuman et al. 2010; Zahra et al. 2004), whereas others believe both systems to be incompatible and conflicting (e.g. Aldrich and Cliff 2003; Fleming 2000; Jennings and McDougald 2007).

Family features make the family business a distinct area of research (Yu et al. 2012). Debates regarding family business strengths and weaknesses are abundant within the family business literature. It is assumed that positive family features will lead to increased performance and profits, whereas negative family features will lead to reduced levels of performance, sometimes even business failure. Positive family features comprise for example long-term orientation (Laforet 2016; Zahra et al. 2004), commitment,

flexibility (Kets de Vries 1993), strong corporate culture (Laforet 2016), family tradition (De Massis et al. 2016; Schuman et al. 2010), loyalty, focus and speed (Allio 2004). It is thought that a combination of these factors will lead to business success and competitive advantage. Negative family features include nepotism (Carney 2005), family conflicts (Colarossi et al. 2008), resistance to change, tradition (Laforet 2016), risk-averseness (Jones et al. 2008), succession conflicts and emotionality (Kets de Vries 1993).

Allio (2004) for example analysed the family features of loyalty, focus and speed and highlights the direct link to competitive advantage and firm performance. The author presumes that family loyalty drives members to avoid self-serving behaviour and instead focus on the common good of the family, leading to increased performance. Similarly, family firms' quick decision-making processes are positively related to firm performance. Competitive advantage is believed to be achieved through family businesses' predominant focus on their core business (Allio 2004). Likewise, a long-term orientation has been depicted in the literature as a positive family feature leading to increased performance and competitive advantage (Lumpkin et al. 2010; Lumpkin and Brigham 2011). A long-term orientation has also been positively related to levels of innovation and entrepreneurship (Zahra et al. 2004).

By contrast, some researchers argue that the family and business systems are incompatible and conflicting (Aldrich and Cliff 2003; Fleming 2000; Jennings and McDougald 2007). They highlight the negative family features and establish a negative link to firm performance. Stafford et al. (1999) for example argued that the involvement of the family within the business hinders the efficient and professional management of the business. Correspondingly, Johansson and Huse (2000) depicted the family system as an arena of emotions and irrationalities. Families are often described as being emotionally attached to their business, due to their long histories and personal pride of family members (Gomez-Mejia et al. 2011). The mainstream view assumes that these family features negatively influence the business system, thus leading to reduced performance and profits.

Tradition has been identified in the literature as both a positive and a negative family feature. On the one hand, researchers refer to a family tradition as a unique and peculiar feature and establish a positive relationship between family tradition and firm performance (De Massis et al. 2016). Schuman et al. (2010) depicted the example of the Italian firearms manufacturing family business Beretta and highlight the positive relationship between tradition and innovation, thus leading to increased financial efficiency and competitive advantage. The authors appear to assume that the Beretta family tradition drives the business forward and is directly related to financial effectiveness and increased profits. On the other hand, some researchers refer to tradition as a negative family feature and equate tradition with resistance and inertia (De Massis et al. 2016), thus highlighting a negative relationship between tradition and firm performance.

Furthermore, nepotism has been identified in the family business literature as a negative family feature, negatively impacting firm performance. Various researchers believe that employing family members regardless of their competencies and abilities can damage the efficiency, leading to decreasing levels of performance and eventually threatening the survival of the business (Carney 2005; Kets de Vries 1993). Colli and Rose (1999) stated the example of the Italian family business Ferrero, where top managers have been fired in order to be replaced by the founder's nephews. Some authors argue that nepotism hinders the business to grow, leads to conflicts between family members and lower-down employees (Bertrand and Schoar 2006) and can result in suboptimal investments and lower profits for the business (James 1999). Analysing this argument from a different angle, it could be argued that nepotism is only considered a 'weakness' or a negative family feature if it is linked to firm performance and profit maximisation. However it has been argued that family businesses predominantly value nonfinancial goals and objectives (Gomez-Mejia et al. 2007).

There is a widely held assumption that resistance to change is negatively linked to firm performance (Laforet 2016). Family businesses are often depicted in the literature as being resistant to change, and risk-averse, which is seen as a major weakness of family businesses, making them inflexible and unable to adapt to the changes in the external environment. However it could be argued that firstly some environments are rather stable and are changing relatively slowly and might not require flexibility and adaptability (Örtenblad 2006). Secondly family businesses are not primarily concerned about performance and profits, as will be discussed at length in the following section on family businesses' importance of socioemotional wealth.

Similarly, within the business history literature, researchers have outlined the strengths and weaknesses of family involvement in management in relation to firm performance. Since the beginning of business history research during the 1970s, a number of business historians have pointed to an intergenerational decline in performance in family businesses (Amatori 2016; Lorandini 2015). The conventional perspective notes that family businesses are unable to survive past the third generation due to family involvement. It has been argued that the first generation, guided by the entrepreneurial founder, creates a successful business; the second generation strengthens the business and the third generation lacks commitment and prioritises leisure activities (Lorandini 2015; Allende 2009). Business historians refer to this phenomenon as the 'Buddenbrook syndrome' (Mackie 2001; Lorandini 2015), where the name for this phenomenon stems from the novel 'Buddenbrooks', published in 1901 by the German novelist, Thomas Mann. "The novel follows the circumstances of a German family firm through several generations, as well as the human, economic, social, and political context in which the family evolves" (Allende 2009, p.1).

Researchers generally assume that only a minority of succeeding generations are able to maintain the founder's entrepreneurial mind-set and continue to successfully develop the company (Lorandini 2015). Amatori (2016) presented the example of the Italian tyre manufacturing company Pirelli, which has experienced a decline in performance during the leadership and

governance of the third generation. The founder of the company Giovanni Battista Pirelli represents the entrepreneur and the driving force behind the successful development of the company (Pirelli 2016). The second generation strengthened the business and started to expand the business internationally, whereas the third generation failed to follow these trends. However it is important to note that in contrast to the Buddenbrook syndrome, the third generation in the Pirelli family business did not lack commitment nor prioritised leisure activities, but simply failed as an entrepreneur and witnessed a decline in performance (Amatori 2016).

This section has examined the dominant debates within the family business and business history literatures regarding family features and the direct link to firm performance. In relation to family businesses' motivations for diversification, the mainstream perspective recognises the negative family features as an impediment to diversification. Negative family features, such as family tradition, risk-averseness, emotionality and nepotism are negatively related to family business diversification. However it has been argued that when diversifying family businesses are not primarily concerned about financial gains and goals, but value nonfinancial goals, which will be examined in greater depth in the following section. Therefore, it could be argued that the mainstream literature adopts a restricted perspective when studying family businesses and their decisions to engage in diversification. Their predominant focus on financial performance and profit maximisation is unable to reveal the underlying assumptions as well as the social/cultural context guiding families and their businesses to diversify. The following section will examine the concept of socioemotional wealth, highlighting the importance of family businesses nonfinancial goals.

### **2.3.1. Socioemotional Wealth**

There is a general consensus within the literature that family businesses value nonfinancial goals, linked to their historical, social and cultural context. The literature portrays a number of nonfinancial goals such as family wealth protection, transgenerational sustainability, long-term orientation and preservation of family control (Hall and Nordqvist 2008; Schmid et al. 2015). These nonfinancial goals or affective endowments are grouped together under the concept of 'socioemotional wealth' (SEW). "SEW is a broad construct encompassing a variety of nonfinancial aspects of the business that meet the family's emotional needs" (Gomez-Mejia et al. 2010, p.225). Similarly, Debicki et al. (2016, p.48) define SEW as "an array of nonfinancial benefits specifically associated with the well-being and affective needs of family members that are derived from operating a business enterprise".

The SEW model implies that family businesses are predominantly motivated to sustain their socioemotional wealth. Various SEW benefits from owning and managing a family business are illustrated in figure 2, notably the ability to exercise family influence, maintaining family control, the continuity of the family dynasty, perpetuation of family values and enhancing family image and reputation (Gomez-Mejia et al. 2007; Gomez-Mejia et al. 2010; Jones et al. 2008; Debicki et al. 2016). Through owning and managing a family business, family members derive not only economic benefits, but also socioemotional wealth benefits. It has been argued that family involvement in the management of the business allows family members to exercise family influence and keep family control as well as sustain family values and the family dynasty (figure 2).

Another SEW benefit outlined in figure 2 is the fact that a family business provides family members with a sense of self and identity. In this instance it could be argued that through managing the family business, family members construct a positive and desired sense of self. The concept of identity formation will be further explored in the following section and particular

attention will be paid to this concept in chapter V (findings chapter) in relation to wine tourism diversification.

Socioemotional Wealth Benefits								
Avoidance of family conflict	Perpetuation of family dynasty	Sense of self and identity	Ability to exercise family influence	Being altruistic to family members	Family members' unlimited exercise of authority	Perpetuation of family values	Sense of belonging	Enhancing family reputation

**Figure 2 - Socioemotional Wealth Benefits**

In this regard, family businesses are fundamentally different from nonfamily businesses, as they tend to be more concerned about nonfinancial gains and rewards (Berrone et al. 2012). Berrone et al. (2012) developed five dimensions of SEW notably, family control and influence, family members' identification with the firm, binding social ties, emotional attachment, and renewal of family bonds to the firm through dynastic succession. The first dimension is concerned with family members' control and influence of the business. The family needs to be in control of the business in order to preserve SEW. The second dimension relates to the family's identification with the business. A family's identity is closely linked to the family business that commonly carries the family's name. The third dimension is concerned with family businesses' social relationships, whereas the fourth dimension expresses the importance of emotions linked to the family business. The final dimension of SEW relates to the family's intention to transfer the business to the next generation, thus guaranteeing transgenerational sustainability. The importance of these five dimensions varies for each family (Cennamo et al. 2012). Some families may put increased emphasis on the continuity of the family business thus transferring business control to the next generation, whereas other families might stress the emotional attachment to the business (Cennamo et al. 2012). Berrone et al. (2012, p.259) further stated that when the family encounters a reduction in SEW, "the family is willing to make decisions that are not driven by an economic logic, and in fact the family would be willing to put the firm at risk if this is what it would take to preserve that endowment". An alternative position could be that most family businesses intend to transfer the business to the next generation (Miller and Le Breton-

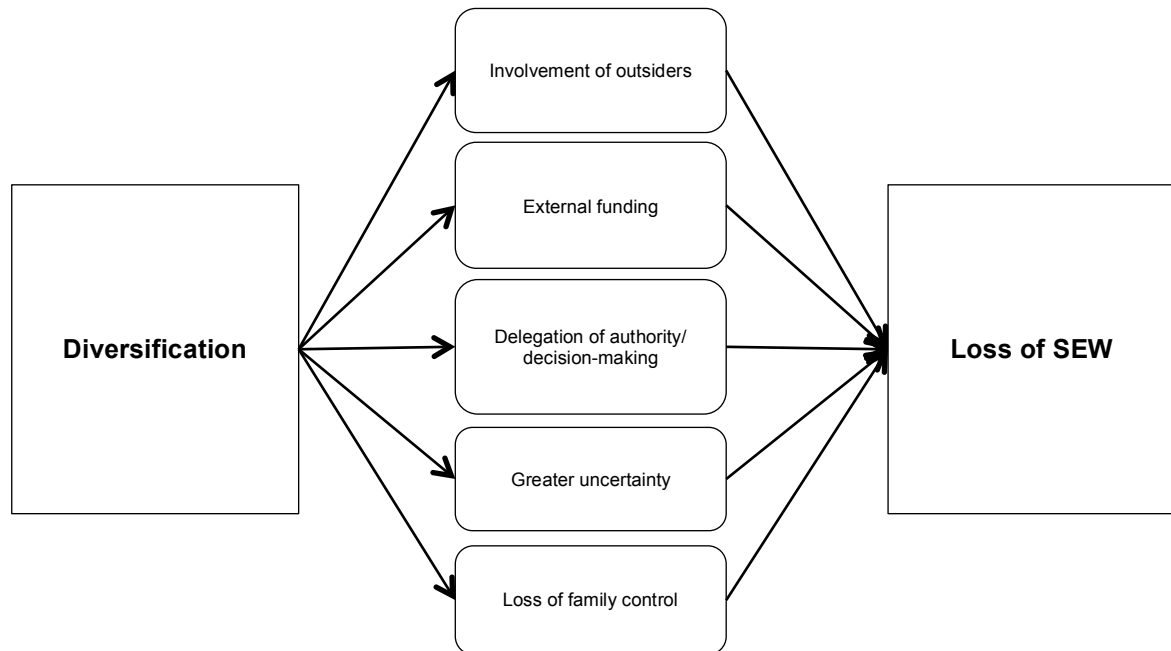


Miller 2014), so that the family is not willing to put the business at risk. The business needs to continue to be competitive and profitable not only for the business but also for the family.

Gomez-Mejia et al. (2007) analysed the concept of SEW in their research on family owned Spanish olive oil mills. These family businesses have the possibility of joining a cooperative as a voluntary act. The cooperative brings a number of advantages to the family business such as important tax benefits; greater economies of scale; technical, managerial and marketing support as well as a guaranteed price per ton of olives (Gomez-Mejia et al. 2007). Once family businesses decide to join the cooperative they cannot go back to being a family business anymore and will lose family control of the olive oil mill. Family businesses will however reduce or even eliminate their risk of economic uncertainty by joining the cooperative. The results of their study showed that when family businesses have to choose between either (i) improved financial benefits, and a better probability of business survival but loss of family control or, (ii) greater risk of decreasing performance and even business failure but perpetuation of family control, the majority of family businesses will choose the latter option. The family still wants to be independent and in control of the business and therefore accepts greater financial and performance risk. Thus, preservation of SEW is considered a priority for these family businesses (Gomez-Mejia et al. 2007).

In spite of researchers' increased effort to further the understanding of the SEW model, no consensus has been reached in relation to the implications and challenges of SEW for family businesses (Romero and Ramizer 2016). Most researchers following the standard research model appear to assume that families' desire to preserve their socioemotional wealth is directly related to decreasing profits and financial benefits. Similarly, it has been argued that the pursuit of financial benefits is likely to reduce families' SEW (Martin and Gomez-Mejia 2016). Accordingly, pursuing financial wealth through diversification has been directly related to the loss of SEW (Gomez-Mejia et al. 2010).

On the one hand it has been argued that less diversification will enable families to preserve SEW, whereas on the other hand, increased diversification will reduce family SEW (Gomez-Mejia et al. 2010). Gomez-Mejia et al.'s (2010) study revealed that diversification is likely to put the family's SEW at risk and thus explains why family firms diversify less than nonfamily firms. There seems to be a general consensus amongst researchers that family businesses diversify less compared to nonfamily business (Schmid et al. 2015; Gomez-Mejia et al. 2010; Hernandez-Trasorbares and Galve Gorriz 2016), although certain researchers argue the opposite (Ducassy and Prevot 2010). It has been argued that diversification requires external funding, it can engender uncertainty and there is probable loss of family control (Gomez-Mejia et al. 2010). Consequently, family businesses opt for less diversification in order to preserve their SEW. Figure 3 highlights a number of consequences of diversification leading to the loss of SEW for family businesses.



**Figure 3 - Consequences of Diversification**

(derived from Gomez-Mejia et al. 2010)

Recently, however, some researchers have criticised this relatively simplistic and restricted view of the relationship between “socioemotional and financial outcomes and the family firm decision-making process” (Martin and Gomez-Mejia 2016). There is still a paucity of knowledge within the family business literature about the interrelationship of financial and socioemotional goals. While the mainstream view suggests that pursuing financial goals reduces socioemotional wealth, Martin and Gomez-Mejia (2016) developed a framework implying that pursuing financial goals increases family SEW. Chrisman and Holt (2016) go a step further and argue that Martin and Gomez-Mejia’s (2016) perspective of family businesses’ decision-making is limited, as they seem to assume that family businesses are primarily concerned about creating and preserving socioemotional wealth, and do not consider how family firms achieve their financial and socioemotional goals.

Their theory argues that families’ ability, willingness and capability determine the achievement of families’ goals. Taking the heterogeneity of family firms into account, it has been argued that families differ in their ability, willingness and capabilities to pursue these goals, leading to distinct behaviours and outcomes amongst family businesses (Chrisman and Holt 2016). The authors noted that “the ability, willingness and capability of each family firm is manifested in the governance systems enacted, the nature of the goals followed and the resources available through family involvement” (Chrisman and Holt 2016, p.281). While previous research only paid limited attention to the heterogeneity of family businesses, this thesis recognises the importance of considering individual family wineries’ motivations and goals, as their motivations are likely to be diverse and differ. These differences in motivations for diversification are explored in greater depth in chapter V (findings chapter).

Consequently, in order to advance the field of family business studies, Chrisman and Holt (2016) emphasised the importance of extending “the socioemotional wealth-based explanation of family firm decision-making” (p.284). This thesis does that and adopts a multi-layered approach in order to gain a deeper understanding of family businesses’ motives for diversification.

This section reveals that no consensus has been reached within both the agricultural and family business literature regarding diversification decisions and motivations. While both literatures predominantly focus on the economic-social dichotomy in explaining family businesses' motives for diversification, little attention has been paid to the deeper, subconscious motives underlying family businesses' decisions to engage in diversification.

Consequently, this thesis claims that family businesses' diversification decisions are inextricably linked to family members' self-constructions. It is argued that the focus on identity advances and deepens the understanding of family businesses' motivations and decisions to diversification. Identity work and identity regulation are taken as focal points for examining family businesses' diversification decisions. In the following section, the concept of identity formation, and the complex interplay between identity work and identity regulation will be addressed, in order to explain family businesses' willingness or unwillingness to diversify.

## **2.4. Identity Formation**

While the previous section delineated the various social and economic motives underlying family businesses' diversification decisions, this section will examine the concept of identity and its influence on individuals' behaviour and decision-making process. It is argued that diversification decisions are inextricably linked to individuals' identity formation.

The first part outlines the different paradigmatic approaches adopted in researching identities. As this thesis adopts a social constructionist perspective, the importance of language, social interactions and narratives in constructing individuals' identities is emphasised. The second part discusses the agency-structure dichotomy, whereas the third part examines the complex interplay between identity work and identity regulation, both within a corporate and agricultural context.

### **2.4.1. Different Paradigmatic Perspectives**

The notion of identity has received considerable attention within the management and organisation literature. Researchers have adopted different paradigmatic perspectives to study identity within the corporate environment, notably a functionalist, interpretivist or critical perspective (Alvesson et al. 2008). Functionalist researchers assume that there is a true, essential, and stable core self (Brown 2015). The individual is depicted as an isolated, independent being with an essential, distinctive identity (De Fina 2011; Eisenberg 2001), aiming for a sense of stability (Alvesson and Robertson 2015; Brown 2015). While the functionalist approach dominates identity studies within the management and organisation literature (Alvesson et al. 2008; Sveningsson and Alvesson 2003), various researchers have criticised this mainstream approach.

After two decades of consideration and debate about identity, a shift in perspective has been witnessed, notably a shift towards an anti-essentialist and social constructionist perspective (De Fina 2011). Within an organisational context, social constructionist researchers refer to identity as a key concept in examining and understanding the intricate and dynamic relationships between an individual's self-concept, his/her work and the organisation (Alvesson et al. 2008). They argue that identities are constructed discursively and that the social, historical, political and cultural context has to be taken into consideration (Alvesson et al. 2008). Bucholtz and Hall (2005, p.588) referred to identity as "a social and cultural phenomenon".

While the traditional/functionalist perspective relates to identity as robust, coherent and unified, the social constructionist approach delineates individuals' identities as much more fluid, uncertain, changeable and fractured (Alvesson 2010; Clarke et al. 2009), due to an unpredictable and unstable social world (Alvesson and Robertson 2015). Brown's (2015) example adopted an anti-essentialist position of the self and argued that due to changing contexts, identities can easily be developed, altered, changed or lost. In this instance, identities are depicted as 'doing' rather than 'being' (De Fina

2011) and are conceptualised as “the meanings that people attach reflexively to themselves in response to questions such as ‘who am I?’ and ‘who do I want to be in the future?’” (Brown and Coupland 2015, p.1316). Individuals’ identities are perceived to be dynamic, ‘in-progress’, and positional, “the appearance of stability being but a momentary fiction” (Brown and Lewis 2011, p.873; Brown 2015; Kuhn 2006).

This thesis adopts a social constructionist perspective and views identities as individually constructed through discourse (Huber and Brown 2016). As will be highlighted in the methodology chapter, the social constructionist perspective is in accordance with the discourse analytical approach adopted to analyse participants’ accounts. Correspondingly the following section will examine the concept of identity from a social constructionist perspective, highlighting the importance of language, discourse and interaction in constructing self-identities.

#### **2.4.2. Social Constructionist Perspective**

The social constructionist perspective highlights the centrality of language, narrative, interpersonal communication and soliloquy for the production of individuals’ identities (Alvesson 2000; Brown and Coupland 2015; De Fina 2011). Social constructionist researchers refer to identity as a temporary, relational, dialogical and context-sensitive phenomenon (Alvesson et al. 2008; Bucholtz and Hall 2005; De Fina 2011). For example, Brown (2015, p.23) noted that “identities are enacted in the ‘now’ through language and action”. Identities are constituted and negotiated as individuals share their knowledge with others in interactions (Alvesson 2000; De Fina 2011). In this instance, individuals are able to communicate and exchange information, manifest their feelings and emotions as well as reveal to themselves and to others, “what kind of people” they are (De Fina 2011, p.263). While individuals engage in interaction and soliloquy to reveal images of themselves, they also use language to identify, classify, distinguish and pass judgment on others (De

Fina 2011). This discursive comparison between self and other will be discussed at length in the subsequent section on differentiating identity work.

Furthermore, in line with the centrality of interpersonal communication for identity formation, it has been argued that identities are constructed through individuals' engagement with narratives (Alvesson and Robertson 2015; Thornborrow and Brown 2009). Narratives have been conceptualised as "a biased depiction of our lives, articulated from an angle that only we can see" (Horrocks and Callahan 2006, p.70). When narrating stories about the past, present and future (Alvesson and Robertson 2015), individuals draw on a variety of discursive resources (Clarke et al. 2009; Watson 2009), notably ethnicity, religion, occupation, family status, age, gender, and/or nationality (Collinson 2003) in order to achieve a sense of self (Warhurst and Black 2016). Discursive resources are defined as

"concepts, expressions, or other linguistic devices that, when employed in talk, present explanations for past and/or future activity that guide interactants' interpretation of experience while moulding individual and collective action" (Kuhn 2006, p.1341).

When narrating life stories and/or engaging in discourse, individuals draw on different resources to construct their preferred self-identity. Within a corporate environment, Clarke et al.'s (2009) research identified a number of antagonistic discursive resources managers drew on in constructing their self-identities, notably, emotion/un-emotion, business/people, and 'professionalism/un-professionalism. Similarly, Watson's (2009) study on rapidly changing family businesses revealed that family- as well as ethnicity-related discursive resources are central in constructing family members' personal identities.

However, due to the variety of discursive resources available to individuals, researchers also emphasise the fact that individuals' identities emerge through multiple, distinct and at times conflicting narratives (Musson and Duberley 2007), resulting in tensions and ambiguities (Watson 2008). It has

been argued that through drawing on various discursive resources and engaging with multiple and conflicting narratives, individuals construct a 'multiplicity of selves' (Eisenberg 2001, p.537). Within an organisational context, researchers have studied managers' multiple self-identities and revealed that managers' occupational identities are likely to differ from and sometimes even clash with identities adopted outside of their working environment, as their job is only considered one part of their lives (Watson 2008). It has been argued that the use of these discursive resources differs between individuals. For certain people, profession/occupation-related discursive resources are central, whereas for others they might only be of minor importance when constructing their self-identities. Similarly, with regards to this study, participants engage in multiple and conflicting narratives when discussing wine tourism diversification. Participants' discourses display socio-economic tensions regarding their motivations for diversification. In this instance, participants construct multiple and sometimes conflicting self-identities. The complex interplay between social and economic motivations for diversification as well as participants' conflicting self-identities will receive particular attention in chapters V and VI (findings and discussion chapters).

Additionally, when engaging with narratives, individuals not only recount their stories and experiences, but also communicate and express emotions and feelings to others (McKenna 2010). It has been argued that individuals' narrated life stories are "full of emotion" and "serve as a window to identity" (Horrocks and Callahan 2006, p.70). In this instance, emotions and emotional life stories reflect an individual's sense of self (Horrocks and Callahan 2006) and are seen as another source of identity. Horrocks and Callahan (2006) highlighted the ubiquitous nature of emotions in people's daily lives and stated that

"through a unique interplay of managing emotional experiences and constructing a way of communicating those experiences to others, and ourselves, we begin to construct who we think we are" (p.69).



It could be argued that through communicating emotions, individuals initiate the process of identity formation. Consequently, this section has examined the social constructionist perspective of identity, adopted in this thesis. While the social constructionist perspective highlights individuals' active engagement in identity formation, it is important to note that individuals' identities develop in a continuous tension between 'agency' and 'structure' (Brown 2015). This thesis highlights the complex interplay between agency and structure when participants construct their self-identities. Particular attention will be paid to the agency-structure dichotomy in chapter V (findings chapter) when discussing participants' identities in relation to wine tourism diversification decisions. The following section will address the dominant debate within the literature regarding the complex and dynamic interplay between agency and structure for identity formation.

#### **2.4.3. Agency and Structure**

One of the central debates within the current literature on identity relates to the extent to which individuals are free and autonomous to choose their identities or whether identities are ascribed to individuals by "historical forces and institutional structures" (Brown 2015, p.26; Alvesson 2010; Clarke et al. 2009). In other words, researchers try to establish the extent to which identities are negotiated between individuals or determined by dominant and societal discourses (McInnes and Corlett 2012).

Social constructionist researchers highlight the importance of individuals' active role in constructing their identities (Bardon et al. 2016; Brown 2015; Thornborrow and Brown 2009; Watson 2008). Individuals have a degree of agency and actively work on constructing their desired sense of self (Warhurst and Black 2016) when confronted with discursive pressures (Watson 2008). Individuals are referred to as 'self-creating subjects' (Thornborrow and Brown 2009), or 'reflexively self-regarding agents' (Brown and Lewis 2011). They actively choose, oppose and construct a variety of self-identities, which guide their behaviour (Thornborrow and Brown 2009).

Similarly, the widely discussed and contested concept of individualisation emphasises individuals' agential role and highlights individuals' freedom to choose and design their own biographies (Vandenberghe 2014), that is, to make decisions about how to conduct their lives, while simultaneously downplaying and neglecting the context and social structures (Brannen and Nilsen 2005). Accordingly, Brannen and Nilsen (2005) noted that "if you think you can choose, then you also believe it is up to you to decide; and you are seemingly not at the mercy of forces beyond your control" (Brannen and Nilsen 2005, p.423). Social structures are believed to constrain individuals from constructing their self-identities and developing their own biography (Atkinson 2007). The literature distinguishes between cultural constrains (e.g. religion, virtues, morals and tradition) and structural constrains (e.g. class, gender, nationality, and family) (Vandenberghe 2014).

The individualisation theory highlights the shift from modernity to post-modernity, also known as reflexive modernity (Brannen and Nilsen 2005) and implies and presumes that "individuals are set free from social structures to such an extent that they are able to distance themselves reflexively from the traditions and conventional modes of thought and judgement in which they have been socialised" (Vandenberghe 2014, p.148-149). While in modernity individuals' identities and biographies/lives were shaped by social structures (family, tradition, class-based society), reflexive modernity underlines individuals' active role in shaping "their own destinies" (Brannen and Nilsen 2005, p.415) and constructing their own identities (Atkinson 2007). Consequently, it is argued that individualisation leads to the "disappearance of tradition, including the traditional family and traditional communities" (Charles et al. 2008, p.4).

However, numerous researchers have criticised the individualisation theory and highlight the importance of paying attention not just to the individual side but also to the structural side of the agency-structure dichotomy. When ignoring structure, researchers also ignore social disparities, inequalities (Brannen and Nilsen 2007) and power relationships. Thornborrow and Brown (2009, p.356) for example noted that individuals' "choices" are made within

frameworks of disciplinary power which both enable and restrict their scope for discursive manoeuvre". Disciplinary power is thus "concerned with the creation of obedient bodies are fixed through the discursive practices which constitute them" (p.359). Similarly, Brown and Lewis (2011) emphasised in their research that identity construction is not only a reflection of agency but also of power – adopting a Foucauldian perspective on power, arguing that "power is everywhere not because it embraces everything but because it comes from everywhere" (Foucault 1980, p. 93). The authors examined lawyers' subjection to disciplinary processes, displaying lawyers as "part-colonised subjects who provide accounts of their selves in vocabularies made available by disciplinary practices" (p.874).

However, compared to the lawyers examined in Brown and Lewis's (2011) study, one could depict participants in this case study as autonomous self-employed wine producers, managing and controlling their family business. However, as the findings in chapter V will reveal, 'structure' refers to the social discourses and practices shaping wine producers' identities. The agrarian mentality, the involvement of the family, as well as the social norms set by the local wine-producing community are recognised as social structures guiding/regulating wine producers' behaviour.

Furthermore, certain researchers argue that identities are neither simply selected nor assigned, but are constructed through individuals' identity work "that occurs in the interstices between domination and resistance" (Brown 2015, p.26). Individuals are "constrained as well as enabled by material conditions, cultural traditions and relations of power" (Musson and Duberley 2007, p.147). Identity formation is thus portrayed as a constant self-society dynamic, the continuous interplay between "internal striving and external prescriptions" (Ybema et al. 2009, p.301).

Correspondingly, it has been argued that the process of identity construction constitutes a complex interplay between agency and structure, highlighting individuals' agential role in constructing their self-identities (identity work) as well as the social structures and discourses shaping their identities (identity

regulation) (Kuhn 2006). The following section will examine the concept of identity work and consider individuals' engagement with different types of identity work, before turning attention to the identity regulating forces.

#### **2.4.4. Identity Work**

In former times, societies and the social context were relatively stable and unlikely to continuously change. Individuals' identities were not considered an issue and predominantly ascribed and assigned to individuals (Howard 2000). Nowadays, economic, social and technological changes are much more continuous and as a result have increased individuals' freedom and choice in expressing who they are and want to be (Collinson 2003).

However, Collinson (2003) emphasised the increased threats, insecurities and uncertainties resulting from these social and societal changes. Identities are likely to be threatened by the turbulent and inconsistent environment and become fractured and destabilised (De Fina 2011; Sveningsson and Alvesson 2003). In these situations individuals experience some sort of self-doubt, confusion and ambiguity. It has been argued that in order to deal with situations of insecurity, uncertainty and doubt, individuals are likely to engage in reflection, are increasingly preoccupied with identity and consequently are more likely to thoroughly engage in identity work (Alvesson and Robertson 2015; Brown 2015). Identity work has been conceptualised as the on-going engagement of individuals "in forming, repairing, maintaining, strengthening or revising the constructions that are productive of a sense of coherence and distinctiveness" (Svensingsson and Alvesson 2003, p.1165).

Individuals engage in identity work to respond to the aforementioned questions of '*who am I?*' and '*who do I want to be in the future?*' (Brown and Coupland 2015) and construct a preferred, desired and strong sense of self (Alvesson 2000; Kuhn 2006; Sveningsson and Alvesson 2003). While in stable and secure situations identity work is relatively unselfconscious

(Alvesson and Willmott 2002), it has been argued that in situations of uncertainty and during times of significant change,

“[c]onscious identity work is thus grounded in both self-doubt and self-awareness, typically contingent upon a mix of psychological-existential angst and complex social situations, involving some disruption of a taken-for-granted or ‘settled’ sense of being” (Alvesson and Robertson 2015, p.12).

Within an agricultural context, the literature has paid attention predominantly to farmers’ identities during and after the diversification process, underlining farmers’ agential role in negotiating, producing and reproducing their preferred sense of self. Researchers have mainly been interested in exploring whether farmers’ engagement in diversification leads to changes, tensions and conflicts in farmers’ identities, or whether farmers’ agricultural identities are resistant to such changes (Brandth and Haugen 2011). Contradictory results have been presented in the literature with regards to changes and conflicts in farmers’ identities after the diversification process. Some studies conclude that farmers’ agricultural/production identity is still dominant and prevailing after the diversification process (Burton and Wilson 2006; Brandth and Haugen 2011), while others highlight farmers’ weak agricultural identity after diversification (Burton 2004; Bryant 1999; Gonzalez and Benito 2001; Vesala and Vesala 2010).

Burton and Wilson (2006) conducted their research on farmers’ identities in the Marston Vale area of Bedfordshire and revealed that 78% of farmers maintained a strong agricultural/farm identity albeit having diversified into tourism. Similarly, Brandth and Haugen’s (2011) study on farm diversification into tourism illustrated that diversification and farmers’ engagement in tourism activities strengthened as well as threatened farmers’ agricultural/conventional identities. Thus, farmers engaged in different types of identity work, notably narrative and differentiating identity work, to construct a strong and coherent agricultural identity. The authors argued that diversification reinforces farmers’ traditional, agricultural identities when differentiating

themselves from tourists and recounting stories about the past and tradition of the farm.

However, irrespective of constructing and displaying strong agricultural identities, researchers also note that diversification and the fact of engaging in various activities outside of farming (e.g. tourism), farmers are likely to adopt multiple and/or diverse identities (Brandth and Haugen 2011). While identity transitions and/or the construction of multiple identities are likely to result in tensions and conflicts, researchers note that it is possible to simultaneously and harmoniously enact multiple identities (Brandth and Haugen 2011).

Furthermore, it has been argued that diversification requires new/post-productivist roles, skills, behaviour and attitudes and as farmers are transitioning from their agricultural profession to becoming a provider of services, farmers are likely to reconstruct alternative/unconventional identities (Brandth and Haugen 2011; Burton 2004; Ibarra and Barbulescu 2010). In Brandth and Haugen's (2011) study tourism has become an important source for farmers' identities, constructing and displaying a strong host identity. Similarly, Vesala and Vesala's (2010) study concluded that diversified Finnish farmers adopted predominantly entrepreneurial identities and displayed much weaker agricultural identities compared to conventional farmers.

Researchers emphasise that these unconventional and entrepreneurial identities are not only adopted by farmers after the diversification process, but farmers are actively engaging in identity work to construct their preferred sense of self (Bryant 1999). Bryant (1999) put farming identities on a continuum from 'traditional' to 'detraditional'/'entrepreneurial' (Bryant 1999). While referring to the traditional farmer as a 'living representation of ... [the] agrarian ideology', entrepreneurial farmers are depicted as proud, market driven farmers, aiming for improvement and growth through diversification' (Bryant 1999, p.244). The author used the terms of 'contemporary', 'progressive', 'technologically advanced' and 'market-oriented' to refer to farmers' newly constructed entrepreneurial identities. Entrepreneurial farmers have changed their perceptions from seeing "farming as a physical labour and

a way of life”, to considering “farming as a business and profit making opportunity” (Bryant 1999, p.252-253). They want to be recognised as entrepreneurial and progressive farmers, adapting to the changes in the external environment and investing in new opportunities.

Finally, Gonzalez and Benito (2001) provided a different reasoning and argued that different identities may be constructed depending on the generation involved in the diversification process. The authors argued that older generations tend to be reluctant to change identities and predominantly maintain an agricultural/farming identity. Younger generations by contrast are more inclined to construct entrepreneurial and/or business identities. In this instance, age has been identified as a conclusive feature and has been used as a discursive resource in constructing farmers’ positive sense of self (Gonzalez and Benito 2001).

In order to construct a strong and positive sense of self, it has been argued that individuals engage in various forms/types of identity work. While the literature outlines a number of different types of identity work, notably homogenising, differentiating, personalising (Huber and Brown 2016), performative, controlling, reconciling, negotiating, confirmatory (McInnes and Corlett 2012), aspirational (Thornborrow and Brown 2009), and narrative identity work (Ibarra and Barbulescu 2010), the following section will discuss the three dominant types of identity work relevant for this thesis, notably differentiating, aspirational and narrative identity work.

#### **2.4.4.1. Differentiating Identity Work**

Differentiating identity work enables individuals to define *who they are* by engaging in ‘self-other talk’, that is, discourses of similarities and differences (Ybema et al. 2009). Individuals engage in differentiating identity work to align themselves with a preferred social group and distance themselves from other groups (Warhurst 2016). In this instance, identity has been defined as “the social positioning of self and other” (Bucholtz and Hall 2005, p.586) as well as

“the continuous confrontation of the self with others” (De Fina 2011, p.271). Identities are constructed through the comparison between self and others.

A fundamental part of the process of identity formation consists of understanding ‘*who we are not*’ and by consequence distancing and differentiating ourselves from the ‘other’. Ybema et al. (2009, p.306) referred to differentiating identity work as “the discursive separation of ‘self’ from the ‘other’”, also known as the process of ‘othering’ (Ybema et al. 2012, p.49). This process involves for example the differentiation of and comparison between male and female roles, managers and subordinates, as well as younger and older generations (Ybema et al. 2009). Furthermore, it has been argued that individuals engage in ‘defensive othering’ when constructing their preferred self-identities (McInnes and Corlett 2012), and strengthen their own identities “by constructing the other as unreasonable and consistently incompetent” (McInnes and Corlett 2012, p.35). In this instance, individuals engage in differentiating identity work to develop a positive self-presentation and a negative other-presentation (Oktar 2001).

In Huber and Brown’s (2016) study, differentiation is recognised as a dominant form of identity work. Organisational members engage in differentiating identity work to highlight their distinctiveness and difference from others. Similarly, Thomas and Linstead (2002) revealed in their study that managers construct their identities through engaging in self-other talk. They align themselves with others by noting their similarities and distance themselves from others by emphasising their differences (De Fina 2011).

While differentiating identity work highlights individuals’ agential attempts to distance themselves from the ‘other’, it has also been depicted as individuals’ attempts to determine, legitimate or oppose dominant power relationships (Ybema et al. 2009). It is argued that power manifests itself in every aspect of social life and “is an inseparable part of the social interaction” (Sadan 1997, p.69). This thesis argues that differentiating identity work is triggered by the need to establish and determine power relationships between wine producers and tourists. In this instance, power relationships involve the identification of



the 'targets' and 'agents', constituting the two essential features of the power relationship. In a tourism context, tourists are perceived as 'targets', being subordinate actors, whereas hosts (e.g. government officials, local residents, tour guides, and hotel/restaurant employees) are referred to as 'agents' (Cheong and Miller 2000), exercising power over tourists. Agents are portrayed as having power over tourists in a number of ways, notably, they are able to influence tourists' purchasing decisions and most importantly decide on what can and cannot be seen and experienced by tourists (Cheong and Miller 2000). It can be argued that agents engage in differentiating identity work to distance themselves from targets and position themselves as superior. Similarly, Thornborrow and Brown (2009) use the term of 'elitism' to refer to participants' presumptions of superiority. The authors argued that participants construct their identities as superior, which "often entails claims to special powers, prestige and privileges" (p.364).

In their recent study, Ybema et al. (2012) revealed opposing results and highlighted individuals' attempt to downplay any power relationships between the self and the other. The authors argued that participants engage in collective rather than differentiating identity work, ignoring and removing any differences between the self and the other. Particularly, cultural and hierarchical differences between the two social groups were ignored and participants preferred to play down distinctiveness. Thus, in this instance, rather than engaging in differentiating discourse, participants "invested heavily in an egalitarian discourse which denied or downplayed their own privileged position and any power discrepancies" between the two social groups (Ybema et al. 2012, p.56). However, it could be argued that the majority of researchers note the importance and prevalence of differentiating identity work in constructing individuals' identities. Ybema et al.'s (2012) conclusions are therefore seen as an exception. After having discussed differentiating identity work and individuals' engagement in 'self-other' talk, the following section examines aspirational identity work.

#### **2.4.4.2. Aspirational Identity Work**

The literature argues that individuals engage in identity work to construct an aspirational identity, which has been conceptualised as “a story-type or template in which an individual construes him- or herself as one who is earnestly desirous of being a particular kind of person and self-consciously and consistently in pursuit of this objective” (Thornborrow and Brown 2009, p.355). Thornborrow and Brown (2009) conducted a study on the British Parachute Regiment and revealed how paratroopers engaged in aspirational identity work to construct their desired and preferred sense of self. Paratroopers were characterised as ‘aspirants’ and recognised to continuously pursue a “highly desirable yet elusive” identity (Thornborrow and Brown 2009, p.355)

However, the authors also investigated how individuals’ preferred self-conceptions “were disciplined by the organisationally based discursive resources on which they drew” (Thornborrow and Brown 2009, p.355), meaning that preferred and ideal versions of the self disciplined individuals’ identity work. The Regiment has been identified as producing these idealised identities to which individuals (e.g. paratroopers) aspire. The importance of disciplinary power and organisational and social discourses in regulating individuals’ identities will be further discussed in the section on identity regulating forces (see section 2.4.5.).

#### **2.4.4.3. Narrative Identity Work**

Especially in times of change and transitions, individuals engage in narrative identity work to construct and/or reconstruct their self-identities (Ibarra and Barbulescu 2010). When encountering transitions, such as occupational changes, narrative identity work enables individuals to sustain their sense of self (Brandth and Haugen 2011; Ibarra and Barbulescu 2010). Telling stories about their lives, individuals are able to construct a coherent, authentic and

continuous sense of self, linking the past and the future (Brandth and Haugen 2011; Ibarra and Barbulescu 2010).

It could be argued that when engaging in diversification activities, individuals are likely to encounter occupational changes. They occupy new roles, which require a change in behaviour, attitude and skills. This situation is likely to lead to changes in individuals' self-constructions (Ibarra and Barbulescu 2010). Individuals engage in narrative identity work to maintain feelings of authenticity (Ibarra and Barbulescu 2010). Brandth and Haugen (2011) noted in their study on farm diversification into tourism that farmers engaged in narrative identity work to reconstruct an authentic sense of self. Stories about their lives, the farm and the past generations living and working on the farm helped farmers in the construction of their coherent and harmonious self-identities (Brandth and Haugen 2011). It could be argued that stories about the past, the family and the tradition of the farm are a response to identity threats, as they create feelings of authenticity and legitimacy.

However, it is important to note that within the areas of agriculture and family business, only limited attention has been paid to the concept of identity in relation to family businesses' diversification decisions. Similarly, family members' engagement in different types of identity work remains largely unaddressed within these fields of study. Accordingly this thesis addresses this gap in the literature through linking the concept of identity to family wineries' diversification decisions and exploring how wine producers' engage in different types of identity work to construct a positive sense of self (see chapter V).

This section has argued that individuals actively engage in identity work to construct their preferred, desired and coherent sense of self. Three types of identity work relevant for this thesis were examined, notably differentiating, aspirational and narrative identity work. Despite the different types of identity work presented in the literature, researchers have argued that for some individuals identity work is not considered a priority, as they are not concerned about constructing a preferred and positive sense of self. Within a

management and organisational context Alvesson and Robertson's (2015) study presented an alternative perspective and revealed that participants adopted an 'identity minimalism orientation', meaning that they dis-engaged with the process of identity formation (p.8). Participants avoided constructing their identities in relation to their organisation and did not engage in any form of identity work to identify with their work/organisation. However, it could be argued that Alvesson and Robertson's (2015) study represents an exception, as most of the literature emphasises individuals' active engagement and desire to construct a positive sense of self.

With regards to this research it is important to note that wine producers, as active family members involved in the management of the family winery, can be seen to engage in negotiating, constructing and reconstructing a positive sense of self when discussing wine tourism diversification (see chapter V). Similarly, the majority of researchers consider identity work to be an active process of reflecting on who we are and who we are not, as well as on who we want to be in the future (Brown and Coupland 2015; Musson and Duberley 2007).

Consequently, this section has examined the concept of identity work and highlighted individuals' active role in constructing a desired and positive sense of self. It has been argued that, particularly in times of uncertainty, insecurities and transitions, individuals engage in various types of identity work. While identity work highlights individuals' agential role in constructing a positive sense of self, it has been argued that identities are concurrently being shaped by social and organisational discourses and practices (Kuhn 2006), referred to as identity regulating forces. The following section will discuss the importance of discursive forces in influencing and regulating individuals' self-constructions.

### **2.4.5. Identity Regulation**

Kuhn (2006, p.1340) noted that “identity *regulation* frames discourses as providing the scripts, roles, and subject positions that suture people to social structures”. Similarly, McInnes and Corlett (2012, p.29) emphasised the fact that “individuals might perceive themselves to be under varying degrees of obligation to speak from a particular identity position by the social obligations implicit to the prevailing interactional context”. In this instance, it has been argued that identity construction is not only a reflection of agency but also of power (Brown and Lewis 2011). Societal and organisational discourses constrain individuals from constructing their preferred self-identities and produce ‘disciplined selves’ (Collinson 2003).

While this section will examine the concept of identity regulation within an organisational context, the following section on farmers’ identities will address the concept of identity regulation within a non-corporate context, notably the agricultural context, highlighting the predominance of the agrarian ideology in regulating farmers’ identities.

#### **2.4.5.1. Identity Regulation – Corporate Context**

Within the corporate context, identity regulation has been described as a ‘new’ form or means for exercising management and organisational control (Alvesson and Willmott 2002; Nair 2010). There is a general agreement within the literature on control regarding the gradual shift from bureaucratic, post-bureaucratic to socio-ideological means of control (e.g. identity regulation) (Alvesson and Kärreman 2004; Nair 2010). Management and organisational control is a broadly defined term and has been depicted in the literature as including both formal and informal systems and mechanisms, whose goal it is to manage members’ behaviour in order to achieve the company’s objectives (Hewege 2012). Formal control systems include strategic planning systems, organisational structure, employee reward systems, and standard operating procedures, whereas informal control mechanisms refer to an organisation’s

culture, values, and leadership style (Hewege 2012; Macintosh and Quattrone 2010).

While organisations seem to have undergone a shift from bureaucratic to post-bureaucratic types of organisations, it has been argued that the systems of control still follow the bureaucratic approach, highlighting the importance of more insidious forms of control, identity and culture (Styhre 2008). Identity regulation is recognised as a “pervasive and increasingly intentional” form of management control (Alvesson and Willmott 2002, p.622), also referred to as ‘cultural control’ or ‘socio-ideological control’ (Alvesson and Kärreman 2004; Nair 2010). Identity regulation as a form of socio-ideological control is perceived as “more effective, more totalizing, and less obvious”, influencing organizational members in developing a strong organizational identity (Nair 2010, p.17).

Along this line of thought, Gabriel (1999) argued that “current controls are not merely an intensification of earlier controls, but in some respects novel, in the extent to which they seek to control the subject from the inside as well as from the outside” (p.197). He referred to the inside and outside control of subjects as ‘totalising control’, where internal control relates to employees’ minds and emotions and external control relates to employees’ physical space and appearance. Similarly, Alvesson and Willmott (2002) highlighted management’s increased attention and interest in controlling employees ‘insides’, notably their feelings, self-image and identifications.

These postmodernist controls, including identity regulation “seem to have a far more pervasive impact on the employees’ psychic and social life than the earlier formal controls” (Gabriel 1999, p.184). Examples of identity regulation within a corporate environment include, induction, corporate training as well as in-house communication, such as the use of magazines and posters, so that employees are increasingly adopting the notion of ‘we’ rather than ‘them’ or ‘the company’ (Alvesson and Willmott 2002). These managerial discourses and organisational practices, as a form of identity regulation, influence employees’ identity construction (Gotsi et al. 2010) and are likely to produce

'disciplined' selves (Collinson 2003). Similarly, it has been argued that human resource practices are increasingly used to regulate, control and adjust individuals' behaviour in order to adhere to organisational norms and standards (Huber and Brown 2016).

Consequently, organisational control is achieved through producing managerial and organisation discourses, shaping individuals' self-constructions (Alvesson and Willmott 2002). McKenna (2010) referred to these organisational discourses as 'dominant discourses' and noted that "the power of dominant discourses lies in its ability to produce particular kinds of subjects and normalise a specific type of identity, and to marginalise alternatives" (p.23). In his study, McKenna (2010) used the discourse of constant change as an example of a dominant, organisational discourse. This discourse requires employees to be innovative, flexible and change-oriented. Identities are thus regulated and shaped by dominant discourses about how a manager should behave, think, act and 'be' (McKenna 2010).

However, it has been argued that identity regulation, as a form of organisational control, fails to achieve increased employee commitment, loyalty and participation (Alvesson and Willmott 2002). Individuals' self-constructions have to be understood in relation to the organisational identity and individuals' identification with the company (Nair 2010). Due to the fact that organisational members respond to identity regulation in different ways, a strong organisational identification is likely to lead to lower levels of resistance compared to a weak identification. Displaying/adopting a weak organisational identity, members are inclined to distance themselves from the organisation (Alvesson and Willmott 2002) and draw on different discursive resources when constructing their identities, notably their family.

Furthermore, from a Lacanian psychoanalytical perspective the construction of the self is seen as an imaginary construction, a fantasy and/or illusion (Driver 2009a; 2009b; 2010). It is an imaginary self, due to the fact that identities constructed in the imaginary order are constrained by the symbolic order, notably language (Driver 2010). "In their use of language, humans are

not so much active agents who express themselves by means of language, but rather pawns that are determined by symbolic systems that surround them” (Arnaud and Vanheule 2007, p.361). In other words, “discourse of the self” is “trapped in an imaginary order” (Driver 2005, p.1092). This means that individuals predominantly engage in empty speech, through expressing “what the ego makes believe to be [*their*] authentic self and the imaginary order that the ego constructs” (Driver 2005, p.1097).

Individuals construct their imaginary self around an image of how they want others to see them. In this instance, discourse of true subjectivity – also referred to as full speech – is unable to emerge, due to the fact that the ego “always identifies with the self as an external image” (Driver 2005, p.1097). Due to this constraint, individuals experience fundamental lack, which is referred to as “an articulation of our unconscious that speaks through us even though we cannot understand it” (Driver 2009a, p.495). This lack is caused by the “impossibility of knowing and fulfilling what is unconsciously desired” (Driver 2017, p.15). As will be further discussed in chapter VI, participants’ constructed sense of self is only an imaginary construction and the illusion that the self can be rendered complete (Driver 2010; 2017). These imaginary constructions fail as they are continuously undermined by unconscious desires. In this instance, Driver (2009b, p.355) argued that “who we are and what we want seem to be permanently missing, elusive and lacking”.

After having examined the concept of identity regulation within an organisational/corporate context and emphasised the importance of dominant (business) discourses in controlling and regulating organisational members’ identities, the following section will delineate the identity regulating forces shaping individuals’ identities within an agricultural environment.



#### **2.4.5.2. Identity Regulation – Agricultural Context**

While the previous section on identity work revealed farmers' active engagement in identity work, this section discusses the various social forces influencing and regulating farmers' identities. It could be argued that within the agricultural literature, the majority of researchers appear to assume that farmers are powerful agents when constructing their identities and engage in agential identity work (e.g. Brandth and Haugen 2011; Bryant 1999; Burton 2004; Burton and Wilson 2006). Only limited attention has been paid to the discursive forces shaping farmers' identities (Stenholm and Hytti 2014). One exception is Stenholm and Hytti's (2014) study, examining how Finnish farmers' identities are constituted and shaped by institutional forces.

The authors argued that formal as well as informal institutions influence and regulate the construction of farmers' identities, where the former refers to governments, the European Union and lobbyists, and the latter relates to customers/consumers and the local community (Stenholm and Hytti 2014). Within the European Union, the different reforms of the 'Common Agricultural Policy' (CAP) have led to a reorganisation of farmers' roles and positions (Vesala and Vesala 2010). Besides engaging in their main production activities, farmers are increasingly encouraged to perform a variety of tasks, such as preserving the rural landscape and safeguarding natural resources (Vesala and Vesala 2010), but also contributing to the balanced territorial development through agricultural or non-agricultural diversification (European Commission 2013). In this instance farmers' engagement in entrepreneurship is encouraged both at the European and national level. Additionally, due to the fact that farming operations are tied to a certain place, informal institutions, especially the local community, have been identified as influencing and regulating the construction of farmers' identities (Stenholm and Hytti 2014). Farmers' attachment to their rural areas and its impact on identity will be discussed in the subsequent section on place identity.

Agricultural/farming communities are generally perceived to display a strong reluctance and resistance to change. "The social pressures (not to be

better/different than others), prevalent, especially to rural areas, makes it difficult for farmers to succeed as entrepreneurs” (Lordkipanidze et al. 2005, p.792) and construct entrepreneurial identities. In this instance, farmers might be reluctant to change and adopt entrepreneurial/non-agricultural identities, as they fear to lose their status of ‘good’ farmer. Researchers have argued that especially after the diversification process, farmers may struggle with their identity of being a “real farmer” (Brandth and Haugen 2011, p.35). Burton (2004) used the term of ‘social loss’ farmers may experience when diversifying, meaning that farmers may lose their status as ‘good farmer’. In some cases families have built up this status over a number of generations. Similarly Brandth and Haugen (2011, p.37) noted that

“to share identity with a collective means that there is a common understanding of what occurrences and objects mean. Individuals accept the symbolic meaning of behaviours of the group to which they belong, and a failure to display the symbols of group belonging may result in social disapproval and a corresponding decrease in self-esteem”.

Accordingly, farmers have to deal with the unwritten prejudice that a diversified farmer implies a failed farmer (Burton 2004) or it is seen as “a betrayal of the agricultural profession” (Brandth and Haugen 2011, p.35). Being a ‘real farmer’ means that they adhere to the social/cultural norms and follow the tradition in order to preserve their social status within the local community. In this instance, farmers aim for recognition and acceptance (Burton 2004).

These informal institutional forces (e.g. local farming community) have been discerned in Stenholm and Hytti’s (2014) study as shaping farmers’ identities. The study revealed two contrasting identities, namely that of a producer-farmer and an entrepreneur-farmer. On the one hand, the producer-farmer constructs his self-identity through complying with social norms and traditions set by the local community. Change and innovation are not considered an option and growth is merely identified as a survival strategy. In this instance,

the producer-farmer strives to “secure legitimacy for his farm and his identity as a farmer” (Stenholm and Hytti 2014, p.139). Similarly Bryant (1999, p.242) stated that producer/agricultural identities “are identities which are mostly constructed from industrial norms about gender, family and farming practice”. The producer-farmer aims to gain social acceptance and credibility, thus taking business decisions in the light of social norms and local traditions. Accordingly, the community, local traditions and social norms influence the producer-farmer’s identity. These informal institutions can be perceived as social forces for identity regulation. The tradition and social norms constrain who farmers are, thus limiting their subjectivity.

On the other hand, the authors indicated that the entrepreneur-farmer challenges informal institutions through opposing social norms and traditions. His decisions are taken to increase the efficiency and profitability of the farm, without considering the social norms, the local community or the institutional environment (Stenholm and Hytti 2014). In this instance, the entrepreneur-farmer actively engages in identity work to challenge the social norms in order to construct an entrepreneurial identity. The authors noted that the entrepreneur-farmer aspires to be different and stand out through opposing social norms. It could be argued that farmers’ entrepreneurial motivations, such as their need for achievement, risk-taking, desire for independence, drive, and passion (Shane et al. 2003), influence their identity formation. Thus, negotiating and constructing an entrepreneurial identity could be seen as an attempt by farmers to constitute a preferred, aspirational and distinct sense of self.

Consequently, this section has examined the concept of identity regulation and illustrated the various identity regulating forces within a corporate as well as agricultural setting. While the management and organisational literature depicts identity regulation as a new means for managerial control, the agricultural literature reveals the importance of various formal and informal institutions, particularly the farming community, in shaping and regulating individuals’ identities. Besides these social structures and institutional forces shaping individuals’ self-identities, it is important to consider the central role of

places when examining individuals' sense of self. The following section will address the notion of place and place attachment and its influence on identity formation.

#### **2.4.6. Place Identity**

Place identity has received increased attention from human geography scholars since the 1970s and more recently from scholars within the environmental and social psychology fields of study (Devine-Wright 2013; Hidalgo and Hernandez 2001). Place identity relates to the study of people-place relations and the “feelings that people develop toward the places where they were born and brought up” (Hidalgo and Hernandez 2001, p.273). It is believed that places play an important role and become fundamental elements in the construction of self-identities (Dixon and Durrheim 2000; Hallak et al. 2012). In this instance, the aforementioned questions of ‘*who am I?*’ and ‘*who do I want to be in the future?*’ (Brown and Coupland 2015) individuals respond to when engaging in identity work, are inextricably related to the questions of ‘*where am I?*’ and ‘*where do I belong?*’ (Cuba and Hummon 1993).

Over the years, multiple concepts have emerged when studying people-place relations, all having similar if not identical meanings, notably place identity, place attachment, place dependence, sense of place, and place belonging (Downey et al. 2017; Jorgensen and Stedman 2001; Rollero and De Piccoli 2010). For some scholars, the umbrella term is place attachment, where place identity and place dependence are positioned as two subsets of place attachment (Anton and Lawrence 2014; Vaske and Korbin 2001). Other scholars differentiate between place attachment and place identity, relating to the former one as having an affective dimension, while the latter one possesses a cognitive dimension. (Rollero and De Piccoli 2010). Scannell and Gifford (2017) for example define place attachment as “the cognitive-emotional bond that forms between individuals and their important settings” (p.256), highlighting individuals' emotional, cognitive and affective

connections to places (Jorgensen and Stedman 2001). Similar to place attachment, place identity is viewed as an individual/personal construction (Devine-Wright and Lyons 1997) and has been defined as “that part of people’s personal identity which is based on or built upon the physical and symbolic features of the places in which people live” (Bonaiuto et al. 2002, p.636).

The literature points to a convergence that place identity/place attachment positively relates to age, length of residence and community relationships (Lewicka 2005, 2011; Rollero and De Piccoli 2010), while negatively relating to individuals’ level of education and community size (Lewicka 2005, 2011). Furthermore, previous research has revealed that the development of place attachment is influenced by gender, arguing that females tend to construct stronger place identities compared to males (Anton and Lawrence 2014; Hidalgo and Hernandez 2001; Rollero and De Piccoli 2010).

When examining individuals’ attachment to various spatial ranges, researchers revealed that people tend to develop stronger attachments to their homes compared to their neighbourhood or local city (e.g. Anton and Lawrence 2014; Chow and Healey 2008; Hidalgo and Hernandez 2001). Similarly, different forms of mobility have been recognised to influence place attachment/place identity differently. Daily commuting was negatively related to local and regional belonging, as was domestic travel, while domestic travel and international travel were both positively related to European belonging (Gustafson 2009).

Furthermore, it has been argued that places become part of people’s identities if they are able to provide individuals with feelings of distinctiveness, continuity, self-efficacy and self-esteem (Twigger-Ross and Uzzell 1996; Anton and Lawrence 2014). These four principles of identity are believed to influence individuals’ actions and behaviour (Twigger-Ross and Uzzell 1996). First, distinctiveness relates to people’s “desire to maintain personal distinctiveness or uniqueness” (Twigger-Ross and Uzzell 1996, p.207). In other words, individuals’ connection with a specific place enables them to

differentiate and distinguish themselves from people from other places. Second, places are believed to be “inextricably linked with the development and maintenance of continuity of self” (Twigger-Ross and Uzzell 1996, p.208). While the third principle of self-esteem is concerned with individuals’ feelings of worth and sense of pride, the fourth principle of self-efficacy relates to individuals being able to manage and function effectively and efficiently in their environment (Twigger-Ross and Uzzell 1996). Accordingly, if individuals are able to sustain feelings of distinctiveness, continuity, self-esteem and self-efficacy, places are likely to be assimilated into their identities (Anton and Lawrence 2016).

In this instance, it has been argued that incorporating places into individuals’ self-identities leads to a number of benefits for the individual. Scannell and Gifford (2017) investigated the psychological benefits of place attachment amongst Canadian residents and outlined various benefits notably memories, belonging, comfort-security, relaxation, connection to nature, positive emotions, entertainment, activity support, personal growth, freedom, practical benefits, privacy, and aesthetics. The most frequently experienced psychological benefits resulting from place attachment revealed by participants included memories, belonging and relaxation. The authors argued that participants’ place of attachment supports memories through developing links with their past; it also provides them with a sense of belonging and was positively related to stress-relief and relaxation (Scannell and Gifford 2017). However, it is important to note that when these places undergo substantial changes and development, this situation is likely to impact individuals’ place identities, their sense of belonging and their affective ties to places (von Wirth et al. 2016). Von Wirth et al. (2016) examined the impacts of observed changes in the urban environment on people’s place attachment in Zurich and detected a positive influence on place attachment if the changes are recognized as being beneficial for residents. In this instance, perceived changes are strengthening individuals’ place attachment and place identities. Similarly, this thesis highlights that participants who perceive place changes – which have occurred through wine tourism development – to be positive, construct stronger place identities and attachment (see chapter V and VI).

Within a rural context, previous research has revealed that people living in a rural environment tend to have stronger place bonds than people living in urban environments (Anton and Lawrence 2014). It is believed that individuals' self-identities are intimately related to their specific rural area (Downey et al. 2017). Cassidy and McGarth (2015, p.21) noted that particularly in rural areas, attachment to places is intimately related to "individual's social position and status within a location". The authors argued that

"by marking oneself out as attached to and from a particular place, actors essentially make a statement about themselves and the kind of attributes they can be presumed by others and themselves to have. Through identifying oneself as belonging to a particular culture, community or family an individual is distinguished as being somehow different to others" (p.27).

Similarly with regards to this thesis participants' attachment to a specific rural area influences the construction of their self-identities and guide their actions, decisions and behaviour. By incorporating places into their self-identities, participants not only highlight their distinctiveness and uniqueness, but also show the researcher what they value and how they want to be perceived by others (see chapter V).

Furthermore, the regeneration of rural areas through tourism development has been identified as impacting on residents' place identities (Kneafsey 2000). In their study on tourism entrepreneurship, Hallak et al. (2012) highlighted that tourism entrepreneurs are constructing a strong place identity, which has a direct bearing on entrepreneurial self-efficacy and support for the local community. Their findings revealed that a strong place identity positively affects tourism entrepreneurs' level of confidence and ability and thus leads to increased entrepreneurial activities. As will be discussed in chapter V, Hallak et al.'s (2012) assumptions are only partially true in relation to this thesis, due to the fact that some participants – although having adopted a strong place identity – are unwilling to pursue entrepreneurial activities. In this instance,

participants' place attachment bonds are negatively related to the level of entrepreneurship and diversification.

## **2.5. Chapter Contribution**

This chapter has synthesised the agricultural, organisational and family business literatures to examine the dominant debates regarding family business diversification decisions. This chapter has focused on a number of core themes, notably diversification, motivations for diversification, family businesses, socioemotional wealth, identity formation, identity work, and identity regulation, in order to understand and be able to determine the motives underlying family businesses' decisions to engage in diversification (figure 4).

While the agricultural literature demonstrated that farmers' motivations for diversification are predominantly economically driven, researchers within the family business literature challenged this profit-maximisation approach and revealed that family businesses' diversification decisions are predominantly driven by social motives, notably the need to preserve their socioemotional wealth (SEW). On the one hand, generation of additional income as well as profit maximisation have been identified as prevailing financial/economic motives for engaging and investing in diversification activities. On the other hand, a number of SEW dimensions, including family control, family members' identification with the firm, binding social ties, emotional attachment, and renewal of family bonds to the firm through dynastic succession, have been discerned as influencing and impacting family businesses' diversification decisions. Accordingly, no consensus has been reached within either the agricultural or family business literatures regarding diversification decisions and motivations. While both literatures predominantly focus on the economic-social dichotomy in explaining family businesses' motivations for diversification, this thesis claims that family businesses' diversification decisions are inextricably linked to family members' self-constructions.



It is argued that the focus on the concept of identity advances and deepens the understanding of family businesses' motivations and decisions to diversification. Individuals' self-identities influence their behaviour and decision-making, notably their decisions/motives to engage in diversification. Only limited attention has been paid to the deeper, subconscious motives underlying family businesses' decisions to engage in diversification. Identity work and identity regulation are taken as focal points for examining family businesses' diversification decisions and explaining their un/willingness to diversify. Furthermore, when examining diversification decisions and motivations within an agricultural context, it has been argued that research concentrated largely on the farms that have diversified and overlooked the ones that resisted and opposed diversification (Northcote and Alonso 2011). This thesis will address this gap in the literature, through including family wineries, which resist and oppose wine tourism diversification.

Accordingly, the research themes addressed in this chapter have iteratively informed the analysis of the data and the findings presented in chapter V and have been used to interpret the data in chapter VI. As illustrated in figure 4, combining these research themes allows for a deeper understanding of the motives underlying family wineries' decisions to engage in wine tourism diversification. The following chapter (chapter III) will turn attention to the case study area of *Langhe* and explore the local context. The geographical context (e.g. place) plays a major role in this thesis, as it is argued that participants' attachment to place will deepen the understanding of family wineries' diversification decisions.

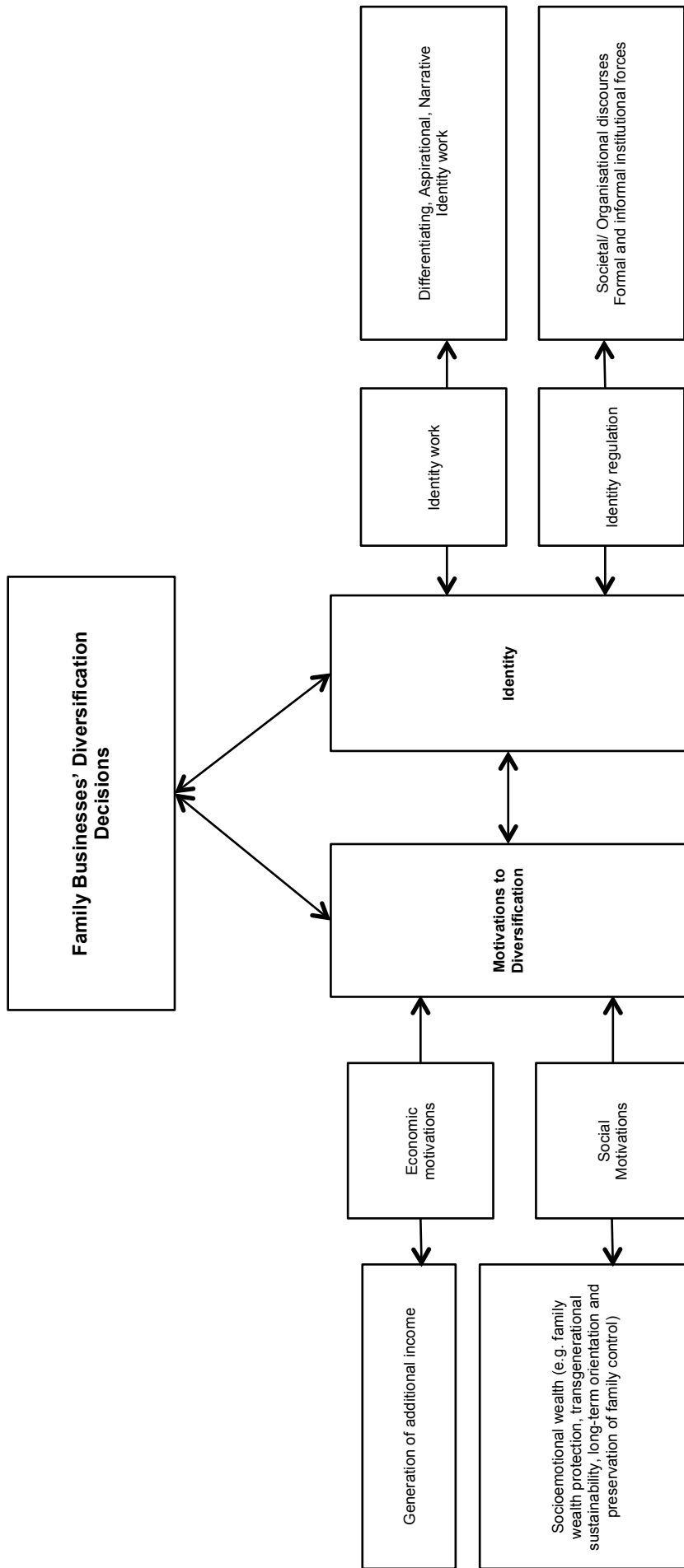


Figure 4 - Conceptual Framework

### **3. Chapter III – Case Study Chapter**

#### **3.1. Introduction**

This thesis adopts a case study approach to examine agricultural family businesses' decisions to diversify into tourism. The Italian wine region of *Langhe* in Piedmont is used as case study to examine family wineries' decisions to diversify into wine tourism. As this chapter will delineate, *Langhe* is an exemplifying region to study due to the fact that it is very traditional, characterised by long lasting winemaking practices and a strong attachment to the place of production. Accordingly, selecting this region to study wine tourism diversification decisions, one might expect at least some resistance to diversification, attributable to its traditional character.

The first part of this chapter examines the macro context relating to this thesis, notably the international wine industry, by identifying recent trends and changes. It is argued that wine tourism diversification can be seen as a beneficial strategy to respond to these changes and trends. Furthermore, the old world and new world wine countries are distinguished, outlining the general agreement in the literature regarding the traditional nature of old world wine producers and the innovative nature of new world wine producers, before focusing on the Italian wine industry. The second part explores the micro context relating to this thesis, notably the wine region of *Langhe* and highlights the importance of its famous food and wine culture. The final section of this chapter examines the importance of wine tourism at the national, regional and local level.

### **3.2. International Wine Industry**

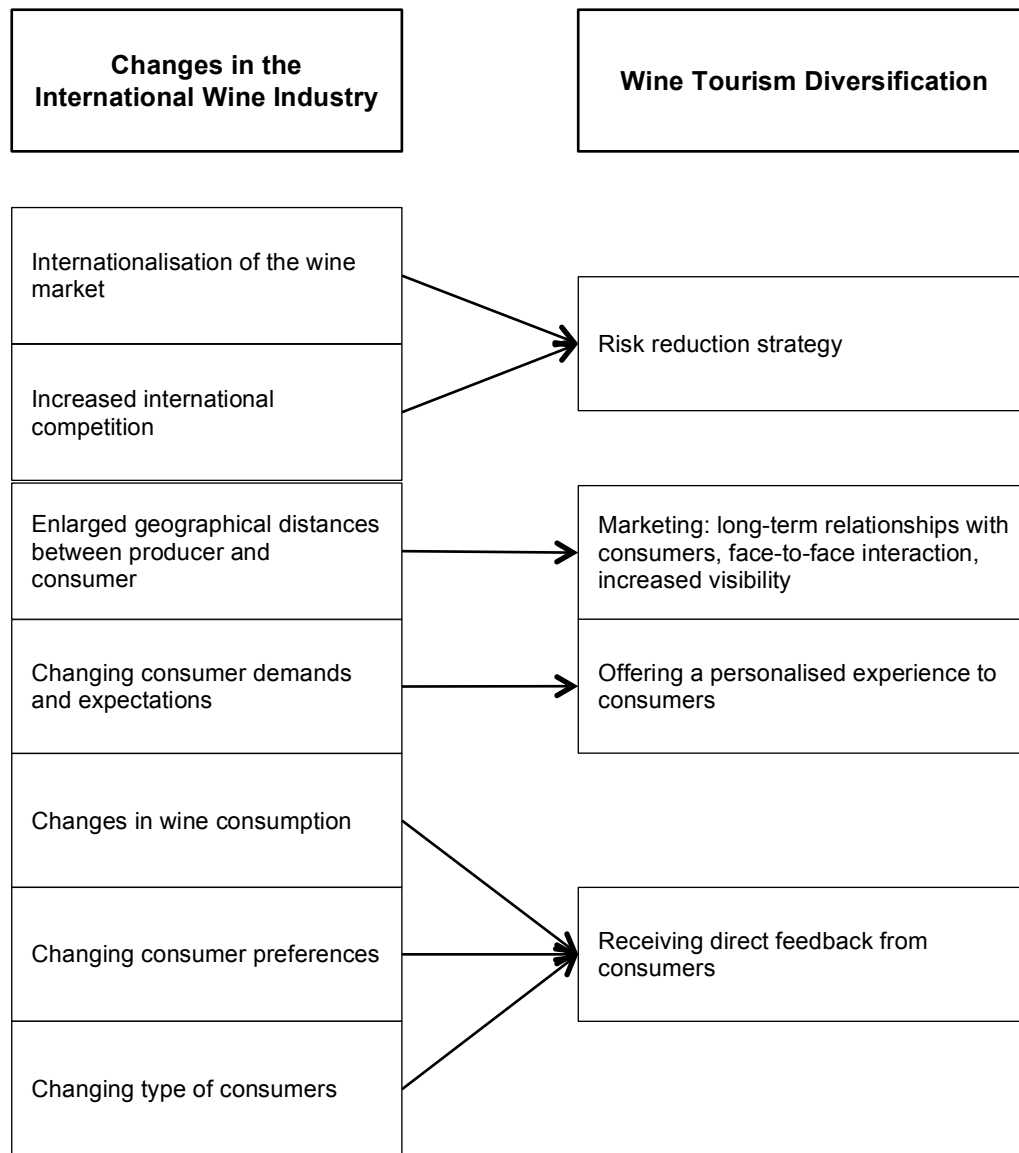
This section discusses the recent changes within the international wine industry, likely to impact wine tourism development, before distinguishing between old world and new world wine countries, highlighting their major differences. During the last decade the global wine industry has witnessed a number of changes and trends, such as changing patterns of consumption, changing consumer preferences, increased global competition and changing market trends (figure 5).

The demand for wine is changing and is becoming increasingly international (Corrado and Odorici 2009). Consumers are generally more interested in quality wines, thus a shift from lower to higher quality wines has been witnessed. Some major changes have been witnessed especially during the 1990s, where social awareness campaigns against drink driving and alcoholism have drastically increased and consumers have become aware of the health features of wine, closely linked to its quality (Bernetti et al. 2006). These rather damaging campaigns for the wine industry have been counterbalanced by the scientific confirmation of the health effects of wine. Moderate amounts of wine on a daily basis are likely to reduce the risk of getting various diseases (Bisson et al. 2002), such as coronary heart disease (Duthie et al. 1998) and Alzheimer's disease. It has been argued that the regular consumption of wine is able to reduce these risks by 50% (Lindsay et al. 2002). In this instance, the quality of wines has come to the fore and consumers' expectations are oriented towards healthier and environmentally friendly wines (Bisson et al. 2002). Terms such as 'natural', 'organic', and 'biodynamic' have been increasingly used in the wine industry. During the last decade, organic products have gained prominence and an increasing number of consumers are concerned about their health, the product quality and safety and the environmentally sustainable production practices (Bisson et al. 2002; Castellini et al. 2014; Molla-Bauza et al. 2005). "In 2012 the European Commission approved Regulation (EU) no. 203 which allows the use of the

term “organic wine” for those products complying with specific requirements and standards and with Organic Certification” (Castellini et al. 2014, p.71).

However, some researchers criticise this perspective and argue that consumers’ concern for the environment does not make them change their behaviour and consumption habits (e.g. Crescimanno et al. 2002; Mann et al. 2012). Mann et al. (2012, p.280) for example concluded in their study that people who observe the positive environmental effects of organic wine production “are not significantly more likely to consume organic wine”. It has been argued that what guides consumers’ purchasing decisions are first and foremost the price (Bernabéu et al. 2008) and the country of origin (Mann et al. 2012), before considering production practices.

These changes and trends are likely to have an impact on how wineries manage their production and promote their wines. The changes might influence wine tourism development at the national level and wine tourism diversification at the local level. Wine tourism diversification can be perceived as a beneficial strategy to respond to these changes (figure 5). Wine producers are able to respond to these changes and trends through interacting on a regular basis with consumers, building long-term relationships and receiving direct feedback on the quality of their wines (figure 5). The following section reveals the debates within the literature regarding old world and new world wine countries, predominantly depicting old world wine producers as traditional and new world wine producers as innovative.



**Figure 5 - Changes in the International Wine Industry**

(derived from Bernabéu et al. (2008); Bernetti et al. (2006); Bisson et al. (2002); Campbell and Guibert (2006); Castellini et al. (2014); Corrado and Odorici (2009); Crescimanno et al. (2002); Hussain et al. (2008); Mann et al. (2012); Mariani et al. (2012); Molla-Bauza et al. (2005); Sellers and Alampì-Sottini (2016))

### **3.2.1. Old World vs. New World Wine Countries**

Within the wine industry, a general distinction can be made between new world and old world wine countries. New world wine countries include the United States, Canada, Australia, New Zealand and more recently, South Africa, Chile, and Argentina. Old world wine countries cover all of Europe, most importantly France, Italy, Spain, Portugal and Germany (Hall and Mitchell 2000). Throughout the 20<sup>th</sup> century, wine production and consumption was dominated by the old world (Orth et al. 2007), where wine has always been a part of people's everyday life.

The emergence of new countries worldwide (new world) as wine producing and wine consuming countries had a major impact on traditional wine producing countries (old world). The negative perception about the quality of new world wines slowly disappeared. Consumers worldwide started to recognise the value for money and the increased quality of new world wines (Aylward 2003). Thus, the intense competition from new world countries and the internationalisation of the wine market represent major challenges for old world countries (Campbell and Guibert 2006). Aylward (2003, p.33) even referred to this shift as "the end of Europe's monopoly on wine culture".

Consumption levels have significantly decreased throughout traditional winemaking countries in Europe and have increased in countries such as the United States, Japan, China, the United Kingdom and Australia (Bernetti et al. 2006; Hall and Mitchell 2000). It becomes evident that for Italy, France, and Spain - representing the leading wine producing countries in the world - consumption levels have dropped nearly by 50% between 1995 and 2012 (International Organisation of Vine and Wine (OIV) 2016).

By contrast, in new world wine countries, wine consumption levels have increased considerably during the same period. This trend of increased wine consumption levels in new world wine regions is undoubtedly linked to the quality improvement of their own wines, which have replaced cheaper old world wines in their domestic market (Hall and Mitchell 2000). However, even

if wine consumption levels in old world wine countries have considerably decreased, they are still significantly higher than in new world wine countries (OIV 2016). In this instance, it could be argued that the old world is still dominating both the demand and supply of the wine market.

Furthermore, within the literature, there is a tendency to depict the old world wine countries as traditional, unchanged, conservative and rooted in their *terroir*, whereas the new world wine countries are considered innovative, more modern and rapidly expanding and changing (Aylward 2003; Banks and Overton 2010). The word *terroir* has been increasingly used within the literature to highlight the distinctiveness of the wines, reflecting the unique features of the land. Researchers agree that there is no accurate English translation for this French term and thus definitions have been rather ambiguous (Vaudour 2002). What is important to note is that the *terroir* constitutes the land's "uniqueness, origin, persistence, specificity and personality" (Vaudour 2002, p.119). Banks and Overton (2006) even include the cultural and historical attributes of winemaking traditions as part of the *terroir*. Thus, these features are all reflected in the wines of a particular place. Old world countries are characterised by a long lasting tradition of wine making. Their winemaking techniques as well as their cultivation of grapes have been refined and perfected over numerous generations of predominantly small-sized family wineries and artisanal producers (Banks and Overton 2010). Therefore, old world producers are characterised as being attached to their place of production and the *terroir* (Banks and Overton 2006).

Even though the idea and importance of *terroir* has developed in France, Bernetti et al. (2006) argue that in Italy the connection between the wine and the *terroir* is particularly strong. During the 1970s, especially in the Piedmont region (bordering France), innovative producers have imported the notion of *terroir* and started to change their winegrowing and winemaking techniques (Barbera and Audifredi 2012). Wine producers highly respect the *terroir* and throughout the winemaking process make sure not to interfere with this uniqueness of the place, so that at the end their wines display a perfect combination between the wine producer's personality and the *terroir* (Barham



2003). Consequently, Langhe is seen as an exemplifying region to study wine tourism diversification decisions in an 'old world' context, due to its traditional character, its strong attachment to the *terroir* and the long-lasting winemaking traditions. As will be discussed in chapter V, the concept of *terroir*, is inextricably linked to participants' place attachment and place identity. Their strong place attachment impacts both positively and negatively wine tourism diversification.

Wine producers' strong attachment to place and *terroir* resulted in the creation of a regulatory framework, notably the Italian DOC/DOCG system (Denominazione di Origine Controllata/ Denominazione di Origine Controllata e Garantita) to control and protect the wine sector. This particular quality control system for Italian wines will be further discussed in the following section of this chapter. Whereas advocates of old world wines emphasise the deeply rooted tradition, strong attachment to the land and *terroir* and the unchanged winemaking techniques as a definite strength, some critics see the old world as "a place of conservatism and trade protectionism" (Banks and Overton 2010, p.59). They highlight wine producers' reluctance to change and adopt innovative technologies as considerable impediments in improving the quality of their wines.

On the contrary, new world wine countries, such as New Zealand, Australia, Chile, North America, Argentina and South Africa are depicted in the literature as being more innovative and taking advantage of the modern winemaking techniques. Whereas old world countries seem to get stuck in tradition and the past, new world countries are more inclined to take advantage of the new technologies. Aylward (2003, p.32) argued that new world wine producers "have embraced a range of R&D practices, including improved viticultural and oenological techniques and management, high-level training, knowledge transmission and technology transfer". Additionally the increased investments in innovative marketing and communication systems enable new world wine countries to gain market share (Campbell and Giubert 2006). This readiness to innovate led to a rapidly expanding wine industry, an increase in quality, and ultimately a restructuring of the international wine industry. However

some critics refer to new world wine countries as having a large-scale industrial production, whereas old world wine countries benefit from an artisanal and authentic wine production (Banks and Overton 2006). They further argue that new world wine production ignores the importance of *terroir*, land and tradition.

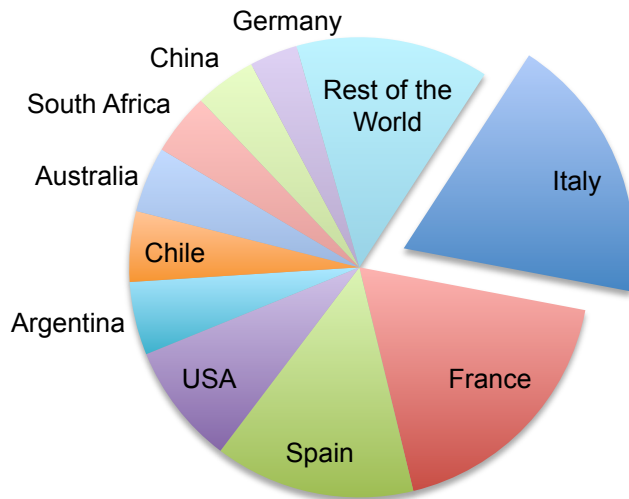
However, a number of authors challenge this view and highlight their disagreement with regards to the dichotomy of the New World being innovative and the Old World being traditional. Due to the restructuring of the industry, old world wine producers recognise the need for innovation in order to respond to the external challenges. Product differentiation, expansion, quality improvements as well as the use of new technology have been outlined as innovative activities in French, Italian, Spanish and Portuguese wine regions (Banks and Overton 2006; Wongprawmas and Spadoni 2017). Along this line of thinking, the findings chapter (chapter V) will extend this discussion of the traditional – innovative/entrepreneurial dichotomy in relation to wine tourism diversification and reveal that old world wine producers display an entrepreneurial/innovative mind-set.

Consequently, it can be argued that the wine industry is still divided into old world and new world wine countries. The new world wine production and consumption has been rapidly expanding over the last decade and the literature agrees that the situation has first of all led to a restructuring of the global wine industry and secondly to increased challenges for old world wine producers. However, as Aylward (2003) argued, wine is still a predominantly old world product, due to its dominant levels of production and consumption. Italy, France and Spain still continue to dominate the international wine market, even if competition is growing. The following section will examine the Italian wine industry, highlighting the strengths and weaknesses of the industry throughout the history.

### 3.3. Italian Wine Industry

The previous review of the literature established that the Italian wine sector is dominated by family businesses (Broccardo et al. 2015). It has been argued that the Italian agricultural system, particularly in the North, is characterised by small-scale family farms with over 90% of these farms using mainly family labour (Defrancesco et al. 2008). Correspondingly, the Italian wine industry is highly fragmented into small-scale wineries and is dominated by family-run businesses (Broccardo et al. 2015; Corrado and Odorici 2009), which display a strong attachment to the local tradition, culture, land and *terroir*. Italy benefits from one of the longest wine traditions in the world (Bernetti et al. 2006). Winemaking is considered a crucial economic activity for Italy (Bresciani et al. 2016) and this holds true also in relation to the export market. Wine (including wine must and vinegar) represents the leading export product of the Italian food and drink industry. The main Italian wine export markets within Europe are Germany and the United Kingdom and outside Europe, the United States, China and Japan (Federvini 2013).

Italy is currently the country with the largest wine production in the world, offering 357 quality wines (Cavicchi et al. 2012, OIV 2016). In 2015, Italy managed to overtake France as the world's biggest wine producer (figure 6). Together with France and Spain, the three countries represent 50% of the global wine production. However with regards to the total number of Italian wine producers or Italian wine producing firms, data has been rather confusing, ranging from 240'000 producers (Malorgio et al. 2011), to 383'000 wine-producing estates (Colombini 2015), 390'000 farms (Gori and Sottini 2014), to 700'000 wine firms (Barbera and Audifredi 2012). Thus it could be argued that it is nearly impossible to determine the exact number of wine producers or wine producing firms in Italy or even in any one Italian region.



**Figure 6 - Global Wine Production - 2015**

(derived from International Organisation of Vine and Wine (OIV) 2016)

### 3.3.1. History of the Italian Wine Industry

The Italian wine industry has undergone a number of changes and had to overcome various difficulties and challenges throughout its history, the most important one being the 1986 methanol incident, which changed the Italian wine industry. In 1986, methanol-contaminated wine killed 25 people in Italy, which led to a worldwide scandal, international media coverage and costly repercussions for the Italian wine industry. Giuliani et al. (2015) considered the methanol crisis to have led to a 'renaissance' of the Italian wine industry.

Before the crisis, the Italian wine industry was characterised by a relatively low quality wine production, using simple wine making techniques. Wine was seen as a commodity – an everyday product, rather than a quality product. The grapes were sold to the local cooperative or if wineries decided to produce the wine, it was sold in big tanks, rather than bottled (Giuliani et al. 2015). Innovative and quality wine producers were rare and quantity prevailed over quality. During that time, only a few exceptional, innovative wine producers adopted French winemaking techniques to improve the quality of their wines. In their opinion, wine was not a commodity but a value-added

product. Giuliani et al. (2015) state the example of Elio Altare, a famous wine producer in Langhe, who changed his production process after having visited the Burgundy region during the 1970s. His focus shifted to producing less quantity and more quality wine, which led to major internal conflicts with his father who was still influenced by the old, traditional mentality. His father saw the new production process as outrageous and offensive and decided to disown his son. After the death of his father, Elio bought back the company and continued to follow his innovative mind-set and is currently one of the most famous wine producers in Langhe. Thus, this can be considered a typical example of the old and traditional way of thinking or as Giuliani et al. (2015) referred to it as the 'cognitive resistance' to change. This traditional, agrarian mentality has been identified as a fundamental element in relation to wine producers' decisions to diversify into wine tourism and will be further discussed in chapter V and VI (findings chapter and discussion chapter). These chapters will highlight the importance of tradition and the agrarian mentality amongst the local wine-producing community. It will be argued that the recent development of the wine tourism industry and the engagement in wine tourism diversification conflict with the traditional agrarian mentality. Conventional wine producers display an old/traditional way of thinking and are reluctant to change their practices and diversify into wine tourism. However, similar to Giuliani et al.'s (2015) example of Elio Altare, this thesis depicts the example of a number of entrepreneurial wine producers in Langhe, who actively challenge this traditional agrarian mentality by engaging in wine tourism diversification.

Furthermore, following the methanol incident in 1986, a challenging time period began for the Italian wine industry. Decreasing domestic consumption levels and a significant decrease of Italian wine exports led to numerous wine producers going out of business (Giuliani et al. 2015). Other wine producers had to drastically change their wine production, innovate and explore a new business model in order to survive. However as only a few wine producers possessed the capabilities to produce quality wine, oenologists played a crucial role in driving the industry forward. Oenologists were hired and helped winemakers change their winemaking process. Every aspect of the process

was inspected – from working in the field up to bottling the wines. But not just the winemaking processes had to drastically change to survive during these difficult times, also wine producers' mentality had to change, which up until then was deeply embedded in the old and traditional farming methods (Giuliani et al. 2015). Changing the old business model and adopting a new business model focusing on quality and reducing quantity was not easy for winemakers to accept. Thus oenologists did also assist wine producers in overcoming “psychological and cognitive barriers in order to break into the new business model domain” (Giuliani et al. 2015, p.741). Gradually, an increasing number of producers decided to adopt the new business model. Consequently, after the 1986 incident, the Italian wine industry managed to reposition itself on the international market through the emergence of quality wines and a strong identity (Giuliani et al. 2015). Nowadays, the Italian wine industry has re-conquered a dominant position within the international wine market and is one of the top three wine producing and exporting countries in the world. It could be argued that having re-conquered this dominant/high-quality position on the wine market, wine producers display a certain sense of pride and satisfaction. They are predominantly concentrating on the quality of their wines and are reluctant to engage in any activities (e.g. wine tourism diversification) that are likely to interfere with their high-quality wine production.

### **3.3.2. Designation of Origin**

After these incidents and challenges, Italy has developed a designation of origin law in order to guarantee the quality of the wines and officially recognise quality wines (Corrado and Odorici 2009). If the level of quality is achieved, Italian wines are recognised by quality labels (Asero and Patti 2009). The two most important quality labels for Italian wines are DOC (controlled denomination of origin) and DOCG (controlled denomination of origin guaranteed). In order for Italian wines to be awarded these quality assurance labels, disciplinary rules have to be followed (table 1). These quality labels are of major importance to wine producers, as they provide and maintain recognition for quality wines at an international level, attract a high

premium market and at the same time help with the tourism promotion of the wine regions (Presenza et al. 2010).

#### **Disciplinary Rules for DOC/DOCG**

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- (1) Use of specific grape varieties
- (2) Exact area of cultivation
- (3) Maximum yield permitted per hectare
- (4) Limited quantity of wine
- (5) Minimum period of ageing
- (6) Minimum percentage of alcohol allowed

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#### **Table 1 - Disciplinary Rules - DOC/DOCG**

(Consorzio di Tutela Barolo Barbaresco Alba Langhe e Dogliani 2016)

Italy has 72 DOCG and 332 DOC wines (Italian Wine Central 2014). Northern Italy accounts for 42% of the total of denominations (ISMEA 2011). Number one region is Piedmont with 58 denominations, followed by Tuscany (52) and Veneto (42). According to Delmastro (2005) Piedmont is the most important wine region in Italy. At the local level, 90% of vineyards of the Langhe area and its neighbouring district of Roero form part of the DOC and DOCG qualifications, compared to an average of 40% of vineyards in most other Italian wine regions (Consorzio di Tutela Barolo Barbaresco Alba Langhe e Dogliani 2016). This means that Langhe benefits from a high quality and strictly regulated wine industry. The '*Consortium for the Protection of Barolo Barbaresco Alba Langhe and Dogliani*' is inter alia in charge of the management of the DOC and DOCG wines and has to ensure that the disciplinary rules are respected. It could be argued that these highly respected disciplinary rules reflect the general conservatism and conventional mentality of wine producers, prioritising winemaking activities. In this instance, some

wine producers might perceive wine tourism diversification as interfering with their priority of upholding the highest level of quality of their wines.

Consequently, this section has examined the Italian wine industry and highlighted the shift in both wine production processes and wine producers' mentality. The methanol crisis in 1986 triggered this shift and led to a renaissance of the Italian wine industry (Giuliani et al. 2015). The designation of origin DOC and DOCG assist in guaranteeing the quality of Italian wines. Furthermore, it has been argued that Piedmont is one of the most important and high-quality wine regions in Italy. Piedmont is situated in the northwest of the country, bordering France and Switzerland. In Italian, the name '*Piemonte*' means 'at the foot of the mountain', most likely due to the mountainous and hilly landscapes of the region. This research uses as case study one of the most famous wine areas in the Piedmont region, namely *Langhe*. The following section will examine the Langhe area, its tourism industry, its recent inscription on the UNESCO World Heritage List as well as one of the most famous wines and villages in Langhe, notably *Barolo*.

### **3.4. Langhe**

Langhe is an exemplifying region to study family wineries' wine tourism diversification decisions in an 'old world' context, due to its traditional character, its long lasting winemaking practices and its strong attachment to the place of production. The landscape of the Langhe area is marked by hills covered in vineyards, spreading out at elevations of between four hundred and eight hundred meters (see Appendix 1) (Consorzio Turistico Monferrato, Langhe, Roero 2012). Typical for the Italian countryside, the small villages in Langhe lie on top of the hills and are surrounded by vineyards and dominated by castles and churches. Langhe is also referred to as the 'land of castles' (Piemonte Italia 2013). Figure 7 shows a map of the Langhe area, presenting the different locations of the family wineries participating in this research.



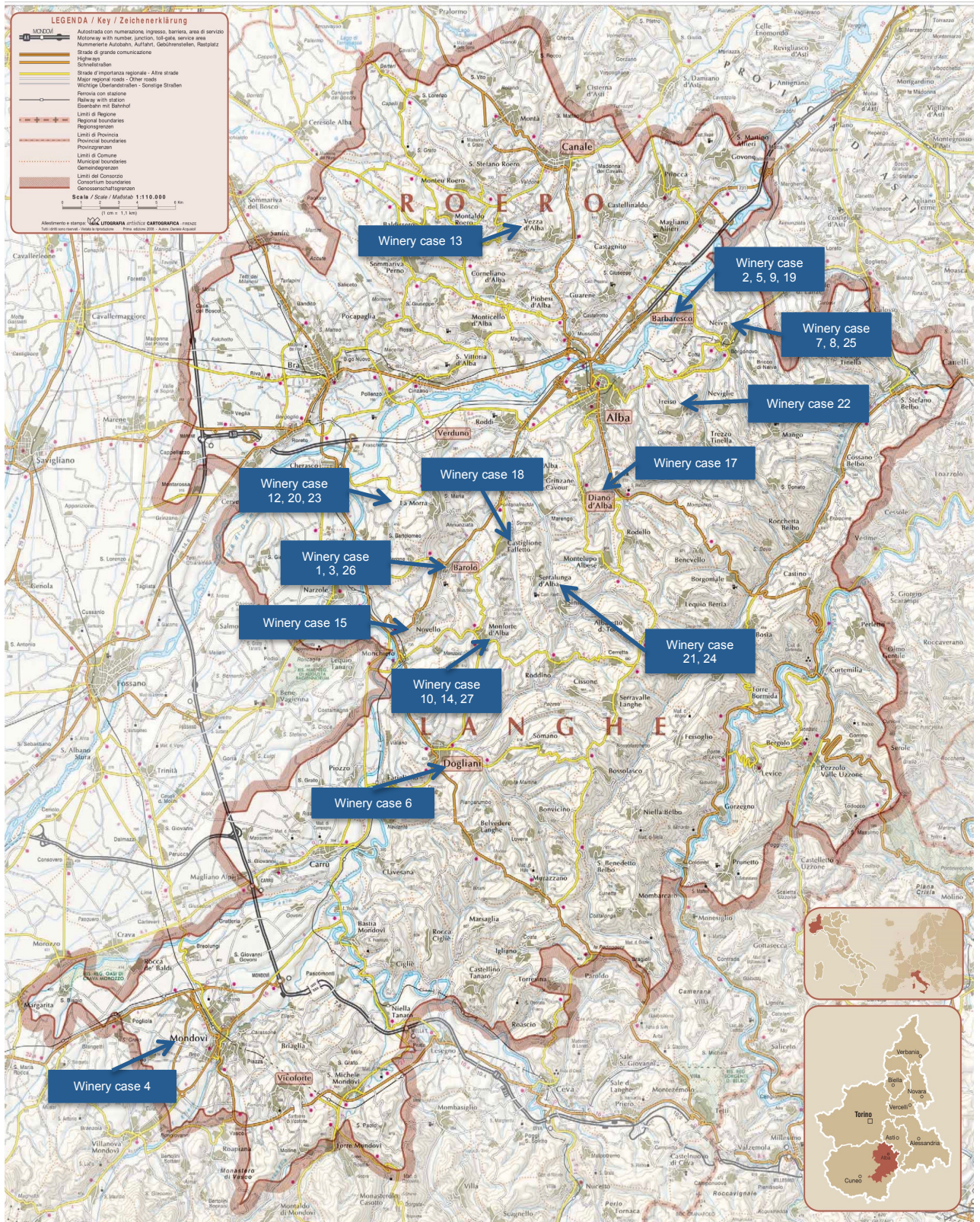


Figure 7 - Langhe area and case study family wineries

(Albeisa – La Carta dei Vini di Langa e Roero)

'Enogastronomic' and cultural tourists are coming from around the world to visit the Langhe area to enjoy the wines, the food and the landscapes. Local restaurants offer traditional Piedmontese food and a large selection of local wines. Appreciated by tourists as well as local residents is the fact that restaurants throughout the Langhe area offer high quality food at affordable prices. They are not considered 'tourist traps', which might be the case for other tourist destinations throughout Italy. Local food and wine play a major economic and social role for the region and shape the local culture in Langhe and its neighbouring district of Roero. Langhe is particularly famous for its white truffle (Piemonte Italia 2013). Langhe's capital city of Alba organises the annual white truffle fair '*Fiera Internazionale del Tartufo Bianco d'Alba*', during the months of October and November, attracting numerous tourists (Consorzio Turistico Monferrato, Langhe, Roero 2012). The fair developed during the late 1920s and has been organised for 86 consecutive years.



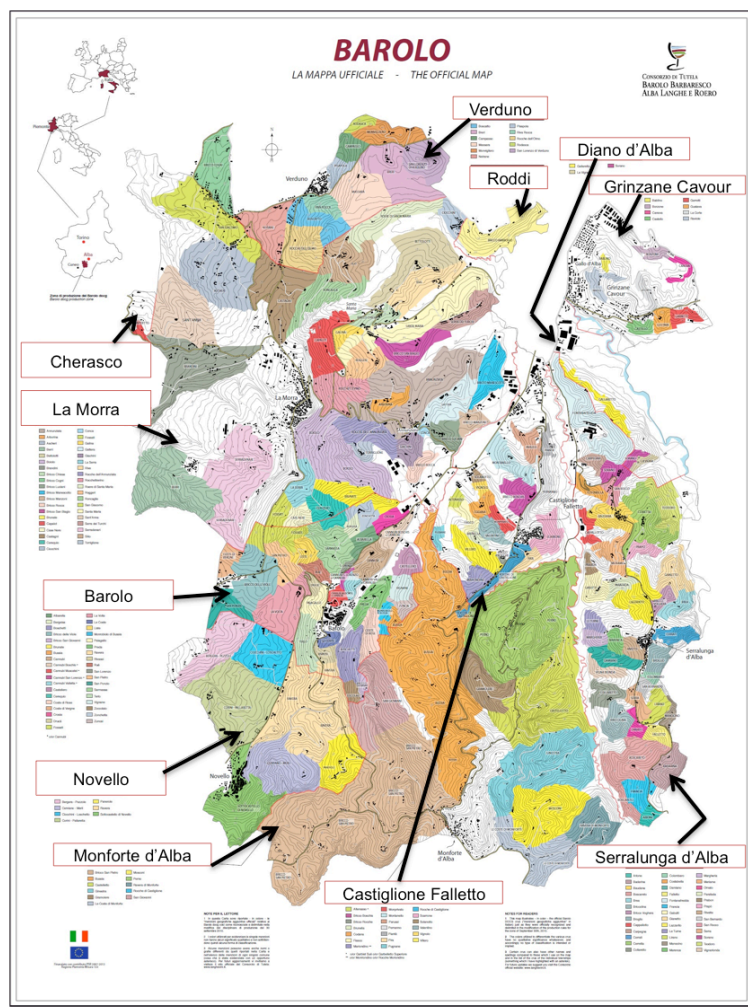
**Figure 8 - White Truffle Fair - 2016**

(derived from Fiera del Tartufo 2016)

Undoubtedly the most famous wine of the Langhe area is the *Barolo* wine, recognised as a premium Italian wine (Benfratello 2009). Interestingly, the name *Barolo* is simultaneously the name of one of the villages in Langhe, the name of the wine production area and the name of the wine. *Barolo* wine is made from the Nebbiolo grape and only a few communes in Langhe are allowed to produce *Barolo*, notably the communes of Barolo, Castiglione Falletto, La Morra, Monforte d'Alba, Serralunga d'Alba, Diano d'Alba, Grinzane Cavour, Novello, Roddi, Verduno and parts of Cherasco (Rosso 2014) (see figure 7; photograph 2, 3). The Barolo wine production area spreads over 1000 hectares and counts between 750 and 1000 wine producers (Benfratello 2009; Rosso 2014). The Barolo area has an annual production of about 8 million bottles, compared to 800 million bottles in Bordeaux. Shortage of land and legal restrictions are considered the main reasons why the annual production of Barolo is unlikely to increase (Rosso 2014).



Photograph 1 - Winery Case 1 (Barolo)



**Figure 9 - Barolo Wine Production Area**

(Consorzio Di Tutela Barolo, Barbaresco, Alba, Langhe e Dogliani 2016)

During the early 1990s Barolo and Langhe started to receive increased international attention when Barolo was recognised as ‘one of the world’s great wines’ (Rosso 2014). Especially through organising food and wine related events throughout the year, Langhe has become a popular tourism destination and is increasingly attracting tourists from around the world. Additionally, the recent inscription on the UNESCO World Heritage List in 2014 of the vineyards of Langhe-Roero and Monferrato generated an international visibility and increased marketability of the Langhe area, which contributed to the development of the local tourism industry. The World Heritage Committee states that the two criteria, which were decisive for the inclusion of the vineyards into the UNESCO World Heritage List are (1) the

local regions' history and traditions; and (2) the harmonious interaction with the natural environment.

(1) “The cultural landscapes of the Piedmont vineyards provide outstanding living testimony to winegrowing and winemaking traditions that stem from a long history, and that have been continuously improved and adapted up to the present day. They bear witness to an extremely comprehensive social, rural and urban realm, and to sustainable economic structures. They include a multitude of harmonious built elements that bear witness to its history and its professional practices”

(2) The vineyards of Langhe-Roero and Monferrato constitute an outstanding example of man's interaction with his natural environment. Following a long and slow evolution of winegrowing expertise, the best possible adaptation of grape varieties to land with specific soil and climatic components has been carried out, which in itself is related to winemaking expertise, thereby becoming an international benchmark. The winegrowing landscape also expresses great aesthetic qualities, making it into an archetype of European vineyards” (UESCO 2015).



**Photograph 2 - Commune of *La Morra***



**Photograph 3 - Commune of *Serralunga d'Alba***

Langhe has been recognised for its long-standing tradition in winemaking, its interaction with the environment and the aesthetic qualities of the area. Local wine producers recognise the UNESCO label as an important feature for the promotion of the area. Especially in relation to the tourism industry, the inscription on the UNESCO world heritage list is seen as an encouragement for the local area to develop its wine tourism sector (Colombini 2015). The following section will thus examine the importance of wine tourism at the national, regional and local level.

### 3.5. Wine Tourism

Wine tourism is defined as “visitation to vineyards, wineries, wine festivals and wine shows for which grape wine tasting and/or experiencing the attributes of the grape wine region are the prime motivating factors for visitors” (Hall and Mitchell 2000, p.447). In this instance, wine tourism, as any other form of alternative tourism, (e.g. food tourism, game-angling tourism, hunting tourism) is about “individual connection with place” and “deeper interaction with the natural environment” (Mordue 2016, p.275; Hall et al. 2003).

Wine tourism in Italy started to develop during the 1990s, when national and regional associations were formed to promote wine tourism and attract international tourists. At a national level, wine tourism has developed since the early 1990s. The absence of a Ministry of Tourism in Italy, since its abolition in 1993 led to a lack of coordination of the tourism industry at the national level (Romano and Natilli 2009). Furthermore, Colombini (2015) highlighted the fact that wine tourism falls between the agricultural and tourism sectors, resulting in the inefficient development and management of the wine tourism industry. Two national associations have been formed to assist in the development and management of wine tourism, namely the ‘*Movimento Turismo del Vino*’ association and the ‘*Associazione Nazionale Città del Vino*’.

The national wine tourism association ‘*Movimento Turismo del Vino*’ (MTV) was formed in 1993 and is dedicated to actively promoting wine tourism in Italy (Hall and Mitchell 2000). MTV is a not-for-profit organisation, which counts approximately 1000 winery members and tries to develop the country’s wine tourism industry. However it could be argued that with a total number of Italian wine producers ranging between 240’000 and 380’000 (Colombini 2015; Malorgio et al. 2011), the level of participation from wine producers in the national wine tourism association is considerably low. The association aims to promote wine culture, enhance the image of wine regions, increase the economic impacts for the regions and develop initiatives to attract wine

tourists (MTV 2013). However most importantly, Colombini (2015) argued that MTV plays a crucial role in teaching wine producers the essentials of wine tourism. Some further initiatives are for example the development and promotion of wine routes and the organisation of annual wine-related events, such as *Cantine Aperte* (Open Cellars) in May, the feast of San Lorenzo in August and other events during the harvest and Christmas time (Colombini 2015). *Cantine Aperte* is an annual event, which takes place the last Sunday in May and all MTV winery members open their cellar doors to visitors. This event was particularly efficient during the initial period of MTV and the beginning of the wine tourism development in Italy. However some participants in this research study have argued that now, nearly fourteen years after the foundation of MTV, the majority of wineries are open for tourist visits on a daily basis and consider such events as out-dated and useless.

Furthermore, with regards to MTV's initiative of promoting wine routes (in Italian: *strada del vino*), Mitchell and Hall (2000) stated that much has to be done to render the wine routes more efficient as they are still at the introductory stage of development. Similarly, Asero and Patti (2009) argued that some wine routes are still not developed efficiently and that much improvement is needed. Even though wine routes have been introduced in all Italian wine regions, some are not operating effectively. Tomljenovic (2012) sees wine routes as a thick line on the map with some signage but too general to be helpful for tourists.

Another initiative for the development of wine tourism at the national level is the association *Città del Vino* (cities of wine), which coordinates various tourism-related activities, including wine festivals, magazines and research activities. Even in the absence of a Ministry of Tourism, Hall and Mitchell (2000) argued that Italy has a relatively well-coordinated structure for the successful promotion and development of wine tourism. The authors further indicated that according to MTV, between 2 and 2.5 million tourists have visited wine regions. In 2012, Cavicchi substantially increased these figures to 50 million. These numbers have to be considered with care, as researchers



point to the lack of data and information about wine tourism in Italy (Cavicchi et al. 2012; Colombini 2015; Romano and Natilli 2009).

Furthermore, wine tourism has not just been developed and managed at the national and regional level, but also at the local and individual level. At the local level, the consorzi turistico (tourist associations) are promoting wine and farm tourism (Hall and Mitchell 2000). In Langhe, the association '*Piemonte on Wine*' (POW) is in charge of the promotion of wine tourism. The association was formed in 2008 and is a local contact center, situated in Langhe's capital city of Alba, focusing on the promotion of wine tourism and assisting tourists with the booking of wine tours, winery visits and/or wine tastings in Langhe and Roero (Piemonte on Wine 2016). The Langhe area is continuously developing its wine tourism industry and has witnessed a continuous increase in tourist numbers for the last decade (Piemonte in Chifre 2014).

Finally at the individual level, wine tourism is predominantly based on small-sized family wineries, which see tourism as an additional income activity and at the same time offer tourists a unique and authentic experience (Colombini 2015). Wineries have recently recognised the importance and potential benefits of wine tourism. An increasing number of wineries throughout Italy decided to exploit this opportunity and started to diversify into wine tourism. Wineries predominantly offer winery tours, wine tastings and cellar door sales for tourists on a daily basis. Numerous wineries have also decided to expand their business and invest in the development of an agritourism business and/or restaurant. These wine tourism activities will be further discussed in relation to the family wineries' participating in this research (see chapter V).

### 3.6. Chapter Summary

This chapter has examined the Italian wine region of Langhe, used as case study to conduct this research and examine family wineries' decisions to diversify into wine tourism. Langhe has been identified as an exemplifying region to study due to its traditional character, its long lasting winemaking tradition and its strong attachment to the place of production. The chapter outlined the trends and changes within the global wine industry, such as changing patterns of consumption, changing consumer preferences, increased global competition and changing market trends. Wine tourism diversification was identified as a beneficial strategy to respond to these changes.

Furthermore, the old world and new world wine countries were distinguished, outlining the general assumptions within the literature regarding the traditional nature of old world wine producers and the innovative nature of new world wine producers. Italian wine producers' strong attachment to place and *terroir* has been revealed as well as the importance of the predominant agrarian way of thinking and their 'cognitive resistance' to change. Accordingly, selecting this traditional/old world wine region to study wine tourism diversification decisions, one might expect at least some resistance to diversification. Finally the notion of wine tourism was examined at the national, regional and local level.

The following chapter will outline the methods and philosophical assumptions underpinning this thesis in order to achieve its aim and objectives. The methodology chapter will discuss the different phases of the research process, including how participants have been selected for this research, the different visits undertaken to the Langhe area, the generation of the data through semi-structured interviews conducted with wine producers as well as the transcription, translation and analysis of the data.

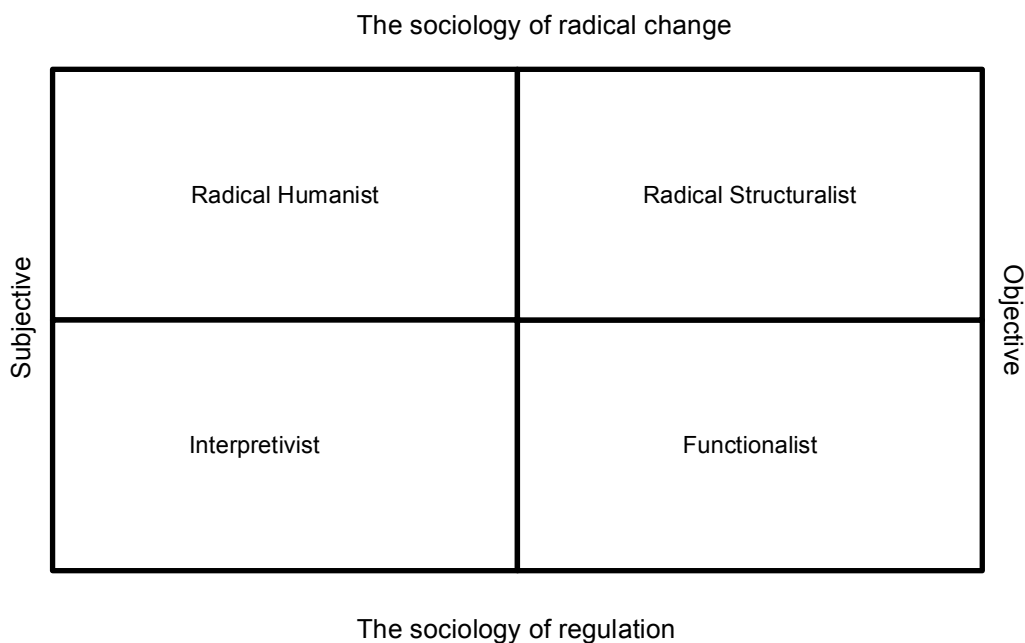
## **4. Chapter IV – Methodology Chapter**

### **4.1. Introduction**

This thesis is concerned with examining family wineries' diversification decisions and understanding the motives underlying these decisions. While the previous review of the literature addressed the core themes of this thesis, notably diversification, motivations for diversification, family business, preservation of SEW, and identity formation, this chapter examines the philosophical assumptions underpinning this thesis, in order to achieve its aim and objectives. The first part of this chapter will examine the methodological approach adopted to conduct this research and achieve its aim and objectives, before turning attention to the methodological considerations for conducting this qualitative research, focusing on credibility, dependability, generalisability and reflexivity. The second part outlines the process for conducting this research while the final part of this chapter will discuss the ethical concerns and potential methodological limitations in relation to this research.

As stated in the introduction chapter, the aim of this thesis is to examine family wineries' wine tourism diversification decisions in terms of wine producers' self-constructions. In order to achieve this aim, three objectives have been set, which are addressed throughout this thesis, notably (i) to analyse the prevailing debates within the diversification and family business literatures in order to reveal the different factors influencing diversification; (ii) to examine the concept of identity formation in understanding wine producers' diversification decisions; and (iii) to explore the motives underlying family wineries' decisions to diversify into wine tourism.

The methodological approach adopted to conduct this research and address the research aim and objectives is informed by the seminal Burrell and Morgan (1979) framework. The framework relates to the assumptions about the nature of science and the nature of society and outlines four paradigms for the analysis of social theory, that is functionalism, interpretivism, radical humanism and radical structuralism (figure 10). While the assumptions about the nature of science can be thought of in terms of the subjectivist-objectivist dimension, the assumptions about the nature of society relate to the regulation-radical change dimension (Burrell and Morgan 1979, p.21). The following section will first of all examine the assumptions regarding the nature of science and the nature of society before turning attention to the multiparadigmatic approach adopted to conduct this research.



**Figure 10 - Four Paradigms for the Analysis of Social Theory**

(source: Burrell and Morgan 1979, p.22)

## 4.2. Nature of Social Science

The nature of social science can be thought of in terms of the subjectivist-objectivist dimension and is based on four sets of philosophical assumptions, notably ontology, epistemology, human nature and methodology (Burrell and Morgan 1979). While the objectivist dimension assumes that the social world is identical or similar to the natural world, and is concerned with context-free observation and measurement of social phenomena, the subjectivist dimension assumes that the social world is fundamentally different from the natural world and is “continuously constructed, reproduced and transformed through intersubjective processes of communication” (Alvesson and Willmott 2012, p.57).

Objectivism adopts a realist ontology, a positivist epistemology, a deterministic view of human nature and a nomothetic methodology, treating the social world like the natural world, that is, external to the individual (Burrell and Morgan 1979; King and Horrocks 2010). By contrast, the subjectivist approach to social science adopts a nominalist approach to social reality, an anti-positivist epistemology, a voluntarist view with regards to human nature and an ideographic methodology, criticising the existence of a single external reality ‘out there’ and adopting the idea of multiple realities (Denzin and Lincoln 2011; Ritchie et al. 2013). This thesis adopts a subjectivist approach to researching and understanding family wineries’ wine tourism diversification decisions, which will be explained below. The following section will address the philosophical assumptions about ontology, epistemology, human nature and methodology from a subjectivist perspective.

#### **4.2.1. Ontology – Nominalism**

Ontology is concerned with the nature of knowledge, the nature of reality or how Ritchie et al. (2013, p.4) referred to it as “the nature of the social world and what is there to know about it”. A fundamental ontological question that needs to be addressed within any research project is whether there is an external reality that exists independent of individuals’ beliefs, perceptions and understandings or whether there are multiple socially-constructed realities, which can only be understood through the human mind and within their particular contexts (Lincoln and Guba 1985; Ritchie et al. 2013).

Burrell and Morgan (1979) distinguished between a realist and a nominalist ontology. As this research aims to investigate wine producers’ motivations, attitudes and perceptions, the ontological assumptions underpinning this research are based on the nominalist perspective. While a realist ontology asserts that there is a single external reality ‘out there’ that exists independently from us (King and Horrocks 2010), a nominalist approach holds that “reality lies in the lived experience of people within their situations and contexts” (Humberstone 2004, p.123).

Similarly, Lincoln and Guba (1985, p.189) noted that when adopting a subjectivist approach, “reality constructions cannot be separated from the world in which they are experienced and ... any observations that might be made are inevitably time- and context-dependent”. In this instance, family wineries’ motivations and decisions to diversify into wine tourism have to be understood in relation to their social context. Participants’ discourses are social constructions, which are continuously negotiated, constructed and reconstructed through social interaction. Wine producers construct multiple realities through their lived experiences as well as through the interaction with the researcher.

#### 4.2.2. Epistemology – Anti-positivism

Linked to the ontological assumptions are epistemological assumptions that guide the research process. This section discusses the two opposing epistemological positions proposed by Burrell and Morgan (1979) of how knowledge is created, notably the positivist and anti-positivist positions. “Matters of epistemology are defined as those insights and questions, which help understand the relationships between knower (the inquirer) and the known (the knowable)” (Hollinshead 2004, p.75). Similarly, Ritchie et al. (2013) outlined that

“Epistemology is concerned with ways of knowing and learning about the world and focuses on issues such as how we can learn about reality and what forms the basis of our knowledge” (p.6).

Therefore, how was I able to gain knowledge about wine producers’ diversification decisions? When adopting a positivist epistemology it is assumed that objective knowledge can be produced, through emphasising on “objective measurement of social issues” (Hennink et al. 2011, p.14). In this instance, meaning exists separately and independently from the operation of any consciousness (Crotty 2015; Healy and Perry 2000). By contrast, an anti-positivist epistemology rejects the positivist approach and believes the social world to be relativistic, meaning that the social world “can only be understood from the point of view of the individuals who are directly involved in the activities which are to be studied” (Burrell and Morgan 1979, p.5). Consequently, in order to gain knowledge about wine producers’ diversification decisions, this research adopts an anti-positivist epistemology.

In this instance knowledge is personally experienced. Knowledge is created through wine producers’ lived experiences and through interacting with the researcher (Denzin and Lincoln 2011). It is argued that the researcher needs to be directly involved and engage in the process of knowledge construction (Burrell and Morgan 1979; Denzin and Lincoln 2011). Only through interacting with participants, sharing their stories and lived experiences, is the researcher

able to learn about and understand their constructed realities. Adopting a subjectivist position, it is argued that the researcher plays an important role throughout this research process, as the social world cannot be understood in isolation and is not external to the individual (Burrell and Morgan 1979), in this case the individual as the researcher. The role of the researcher will be addressed in more depth in the section on reflexivity (section 4.5.2.) of this chapter.

#### **4.2.3. Human nature – Voluntarism**

Burrell and Morgan (1979) distinguished between two opposing approaches to assumptions about human nature, notably voluntarism and determinism. In this research, assumptions about humans are made from the subjectivist perspective. Adopting a subjectivist perspective, the voluntarist view of human nature believes that individuals are autonomous and free-willed, “capable of creating their own environment” (Hopper and Powell 1985, p.431) or as Burrell and Morgan (1979, p.2) referred to it, that “man is regarded as the creator of his environment”.

Furthermore, the nominalist ontology, anti-positivist epistemology and voluntarist view of human nature underpinning this research, have direct methodological implications (Burrell and Morgan 1979; Hopper and Powell 1985), which will be addressed in the following section.

#### **4.2.4. Methodology – Ideographic assumptions**

This thesis adopts an ideographic approach to social science and aims to understand “the way in which the individual creates, modifies and interprets the world in which he or she finds himself or herself”, in order to gain a deeper understanding of the uniqueness and distinctiveness of a particular social phenomenon (Burrell and Morgan 1979, p.3). By contrast, the nomothetic assumptions, based on the objectivist methodological perspective, are



concerned with testing hypotheses and developing general and universal statements.

Adopting an ideographic approach, in-depth and first-hand knowledge of wine producers is obtained through focusing on and investigating their background, lived experiences and family stories during social interaction. The importance lies in 'getting inside' situations through the researcher's direct involvement and contact with wine producers (Burrell and Morgan 1979).

Consequently, relating to the assumptions about ontology, epistemology and human nature discussed above, this thesis recognises the important role of the researcher in social interaction in order to learn about and understand wine producers' multiple constructed realities. As will be discussed in the section on the research process (section 4.6.), the researcher was able to communicate and conduct the interviews with participants in their native language (Italian), allowing the researcher to adopt an 'insider' position rather than an 'outsider' position. In this instance, it is argued that adopting such a subjectivist approach allows the researcher to gain a deeper understanding of the motives underlying family wineries' wine tourism diversification decisions.

After delineating the assumptions about the nature of social science in terms of the subjectivist dimension adopted to conduct this research, the following section outlines the regulation-radical change dimension based on assumptions about the nature of society.

### **4.3. Nature of Society**

Two approaches to society can be discerned, notably the sociology of regulation and the sociology of radical change. The sociology of regulation is based on the 'order' view and is concerned with stability, integration and consensus, interpreting society in relation to its unity and cohesion (Alvesson and Willmott 2012; Burrell and Morgan 1979). The sociology of radical change questions the unity and cohesion of society and emphasises the existence of

conflict, power relationships and divisions of interest in society (Burrell and Morgan 1979; Hopper and Powell 1985).

While the literature refers to the two approaches as a dichotomy of order vs. conflict, it could be argued that – rather than a dichotomy – these two approaches are in effect the extreme points of a continuum. This thesis then adopts a relative central/midway position on the continuum between order and conflict, arguing that society can not only be characterised by order, stability and unity, but takes account of the social inequalities, structural conflicts and systems of power within society (Burrell and Morgan 1979; Hopper and Powell 1985). Consequently, adopting a subjectivist orientation to social science and a mid-way position between order and radical change in relation to the nature of society, this thesis embraces a multiparadigmatic approach. It is argued that this thesis is underpinned by both the radical humanist and interpretivist paradigms (figure 10), which will be discussed in the following section.

#### **4.4. Multiparadigmatic Approach**

With regards to this research, a multiparadigmatic approach is seen as most appropriate in order to achieve the aim and objectives of this research. Although Burrell and Morgan (1979) claimed that their framework illustrates four mutually exclusive research paradigms and emphasised their incommensurability, this claim has been challenged by a number of researchers (e.g. Ahrens 2008; Goles and Hirscheim 2000; Lewis and Kelemen 2002; Willmott 1993a), arguing that meaningful communication and dialogue between paradigms is possible. Willmott (1993a, p.682) for example noted that Burrell and Morgan's (1979) approach "constrains the process of theory development within polarised sets of assumptions about science and society".

While adopting a single paradigm – also known as *isolationist* strategy (Scherer and Steinmann 1999) – has been perceived as rather limiting (Lewis

and Kelemen 2002), a multiparadigmatic approach allows for a better understanding of the complexity, diversity and ambiguity of a particular research phenomenon (Lewis and Kelemen 2002). From an organisational perspective, it has been argued that adopting a multiparadigmatic approach, the researcher is able to investigate and explore contradictions, conflicts and tensions of organisational life as well as reveal conflicting demands and opposing interests (Lewis and Kelemen 2002).

Similarly, with regards to this research, combining both paradigms of radical humanism and interpretivism, the multiparadigmatic approach adopted in this thesis appreciates the subjective dimension in relation to the nature of social science, while simultaneously recognising the potential changes, conflicts and power relationships within society. Embracing a nominalist, anti-positivist, voluntarist and ideographic approach to social science, this thesis is concerned with understanding participants' multiple life-worlds, experiences and their perceptions of 'reality' (Burrell and Morgan 1979; Hopper and Powell 1985; Leppäaho et al. 2016). It is believed that wine producers engage in the construction and negotiation of their social realities by interacting with the researcher and sharing their stories and lived experiences with the researcher.

In order to analyse wine producers' social realities and understand how they are socially constructed (Silverman 2013), qualitative methods, notably qualitative interviews are recognised as most appropriate to obtain in-depth knowledge about social phenomena and to gain "insight into an individual's inner world" (Hopper and Powell 1985, p.431). The importance of qualitative, semi-structured interviews in relation to this research will be discussed in the following section (see section 4.6.).

Furthermore, combining the interpretivist and radical humanist paradigms, this thesis also "understands social order to be a product of coercion, rather than consent" (Alvesson and Willmott 2012, p.60). Society can only be characterised by conflict, domination and power relationships. It has been argued that oppression and power are continuously exercised within society

and everyday life (Alvesson and Willmott 2012). Similarly, adopting a Foucauldian perspective, power is seen as relational and circular:

“power... is not that which makes the difference between those who exclusively possess and retain it, and those who do not have it and submit to it. Power must be analysed as something which circulates... It is never localised here and there, never in anybody’s hands, never appropriated as a commodity or piece of wealth. Power is employed and exercised through a net-like organisation” (Foucault 1980, p.98).

With regards to this research, it will be argued that these systems and relationships of power within society have become apparent when wine producers engage in constructing their social realities (see chapter V). Chapter V depicts inter alia the social norms set by the local community as systems of power, regulating and controlling wine producers’ identity constructions.

Adopting a multiparadigmatic approach allows the researcher to get close to wine producers and capture/appreciate the complexity and uniqueness related to wine tourism diversification (Leppäaho et al. 2016; Nordqvist and Zellweger 2010). The subjectivist approach not only recognises the heterogeneity of family businesses (Nordqvist and Zellweger 2010), but also gives greater valuation to individual voices (Leppäaho et al. 2016). Through combining the interpretivist and radical humanist paradigms, this research aims to contribute to the literature on family business diversification, currently dominated by functionalist assumptions about social science (Leppäaho et al. 2016); predominantly attempting to compare and establish links between family businesses and non-family businesses (e.g. Allio 2004; Laforet 2013; Kellermanns et al. 2008; Zahra et al. 2004).

Consequently, this thesis aims to extend current understandings of family businesses and their motives underlying diversification decisions, through obtaining in-depth knowledge from interacting with wine producers. After

having discussed the multiparadigmatic approach adopted to conduct this research, the following section turns attention to the methodological considerations for conducting this qualitative research, focusing on credibility, dependability, generalisability and reflexivity.

## **4.5. Methodological Considerations**

As highlighted in the previous section, subjectivist inquiry is concerned with understanding and interpreting participants' multiple realities and recognising researchers' essential role in the knowledge construction process. However, functionalist researchers have criticised subjectivist inquiries for being too open to researcher bias, lacking generalisability and having difficulties with replication (Bryman 2004; Mays and Pope 1995). Accordingly, the following section will discuss the notions of credibility, dependability, generalisability and reflexivity with regard to this research.

### **4.5.1. Credibility and Dependability**

Credibility and dependability paradigmatically reflect the functionalist notions of validity and reliability (Lincoln and Guba 1985). Since there is no validity without reliability, it is argued that there is no credibility without dependability (Lincoln and Guba 1985), meaning that "a demonstration of the former is sufficient to establish the latter" (Lincoln and Guba 1985, p.316).

In this instance, credibility is achieved through a continuous engagement at the site in order to generate valuable and credible data (Krefting 1991). Having visited the research site for three consecutive years prior to conducting the research allowed for a thorough understanding of the social context. During that time I was able to build relationships of trust with various individuals, who thereafter acted as gatekeepers during the research process and provided access to the majority of wine producers interviewed for this research. During the research process three additional visits were organised, notably a contextual visit and two visits for data generation (see section 4.6.).

Furthermore, it has been argued that credibility and dependability can also be achieved through reflexivity.

#### **4.5.2. Reflexivity**

Reflexivity refers to the “self-appraisal in research” (Berger 2015, p.220) and is an important process in qualitative inquiry. It is defined as “the awareness that the researcher’s values, backgrounds, and previous experience with the phenomenon can affect the research process” (Cope 2014, p.90).

Subjectivist inquiry recognises the crucial role of the researcher in influencing the various phases of the research process. Often however, researchers “do not acknowledge how, among other things, their own background, gender, social class, ethnicity, values, and beliefs affect the emergent construction of reality” (Sword 1999, p.270). The researcher’s actions, decisions, methods, and questions during the various research phases will inevitably influence the construction of knowledge (Horsburgh 2003; Langdrige 2007). This perspective undoubtedly stands in stark contrast to the traditional, functionalist approach to research, where the researcher sees him/herself as a detached investigator trying to discover some objective truth (Langdrige 2007).

Reflexivity can be shown in research by informing the reader of the social position of the researcher. Having adopted a subjectivist perspective, the researcher is aware of the fact that her values and preconceptions have to be accounted for as they influenced the research process. The researcher is shaped by her lived experiences and her accounts of the social world, which will have an impact on how knowledge is generated (Bryman and Bell 2007; Denzin and Lincoln 2011). The researcher recognises her role of co-constructing knowledge (Langdrige 2007).

Besides acknowledging her values and preconceptions, the researcher needs to evaluate her social position adopted/occupied during the research process

and how this might have affected the research process. Primarily it is important to note that my position and background affected what I chose to investigate (Malterud 2001). I am a female researcher from Luxembourg, educated in tourism and hospitality management with a strong interest in and fondness for Italy. Having travelled to the research site prior to the start of the research influenced my decision to investigate the wine tourism phenomenon in Langhe.

Furthermore, due to the fact that research was conducted outside of the researcher's environment, it is important to note that during the research process I also took the position of 'outsider'/'foreigner', when interacting with and interviewing participants. To compensate for my status as 'foreigner', I conducted the interviews in Italian, which undoubtedly led to a more open and trusting interaction with participants (see section 4.6.). Similarly, it could be argued that through the prolonged engagement at the research site and the continuous interaction with participants reduced my status as 'foreigner'. In the course of the research process, participants showed continuously more interest in the progress of the research and were increasingly prepared and eager to contribute to the research.

Consequently, my background, lived experiences and values shape my view of the social world and how I understand it. The research process, including the methods of inquiry, interview questions and decisions has been influenced by my social position.

#### **4.5.3. Generalisability**

This thesis fundamentally aims to understand and interpret participants' distinct and multiple realities and is not concerned with statistical generalisations (Kvale and Brinkmann 2009). It is argued that while a functionalist inquiry adopts a nomothetic approach to knowledge production, which allows for the development of generalisations, a subjectivist inquiry adopts an ideographic approach to knowledge construction and can therefore

only generate 'working hypotheses', being time- and context-bound (Lincoln and Guba 1985).

Cronbach (1975 p.125) noted that "when we give proper weight to local conditions, any generalization is a working hypothesis, not a conclusion". Similarly, in relation to this research project, the geographical context (e.g place), including place attachment, history and tradition, local community and family business environment, has to be taken into account in order to gain an in-depth understanding of the social phenomenon.

Similarly, participants were not selected to be representative of a population and to facilitate statistical generalisations, but were purposefully selected in order to get a deeper understanding of the phenomenon under study (Lincoln and Guba 1985; Patton 1999). Purposive sampling of participants was adopted initially to collect, code and analyse data (Mays and Pope 1995). Each following sampling unit was selected to "extend information already obtained, to obtain other information that contrasts with it" and "to fill in gaps in the information obtained so far" (Lincoln and Guba 1985, p.201).

While statistical generalisations cannot be claimed for this research, Kvale and Brinkmann (2009) argued that analytical generalisation can be achieved through providing thick and detailed contextual descriptions in order for the reader to judge whether the findings may be applicable and relevant to new, analogous situations. Similarly, theoretical generalisability can be attained "by comparing how well different cases 'fit' within an established theory and how far it is able to explain behaviour in individual cases" (Lewis and Ritchie 2003, p.267), to ultimately advance and refine these theories.

Consequently, this section has examined the notions of credibility, dependability, reflexivity and generalisability in relation to this research. The following section will outline the research process and discuss the individual phases of the process.



## 4.6. Research Process

Phase	Focus	Research methods	Analysis
<b>Phase 1</b>	Literature Review – Wine Tourism, Diversification, Motivations for diversification  September 2014 – July 2015	Secondary Research: initial review of the literature	Thematic Analysis
<b>Phase 2</b>	Contextual Visit – July 2015	Primary Research: meeting potential gatekeepers, conducting observation (local residents, business owners, wine producers), organising main data collection phase	Thematic Analysis
<b>Phase 3</b>	Data Generation – on wine tourism and motivations for wine tourism diversification  August 2015 – September 2015	Primary Research: semi-structured interviews with wine producers (n=25)	Transcription and Translation of interview data, initial coding, Discourse Analysis
<b>Phase 4</b>	Data Analysis – NVivo  Literature Review – Family Business  September 2015 – June 2016	Primary Research: semi-structured interviews  Secondary Research: continuous review of the literature	Discourse Analysis  Thematic Analysis
<b>Phase 5</b>	Data Generation – on family businesses, importance of family, generational change  July 2016 – August 2016	Primary Research: semi-structured interviews with family winery owners/ wine producers (n=15)	Transcription and translation of interview data, initial coding, Discourse Analysis
<b>Phase 6</b>	Data Analysis – NVivo  Literature Review – Family Business, Critical Management Studies, Control, Power, Identity theory  September 2016 – March 2017	Primary Research: semi-structured interviews  Secondary Research: continuous review of the literature	Discourse Analysis  Thematic Analysis

**Table 2 - Research Phases**

#### 4.6.1. Phase 1 – Literature Review

The introductory phase of the research process consisted of examining the current debates within the wine tourism and diversification literature. As Jesson et al. (2011, p.3) noted, the first stage in research consists of assessing “what is already known”. However, it is important to note that considering the existing knowledge did not prevent the emergence of new meaning from the data, rather, the meaning emerging from the data inductively led to the assessment of alternative sources of literature (e.g. family business literature).

The sources used for collecting secondary data include academic sources, such as core textbooks on wine tourism and diversification, journal articles and brochures. Examples of academic journals relating to rural diversification include ‘*Journal of Rural Studies*’ and ‘*Land Use Policy*’, whereas ‘*Tourism Management*’, ‘*Annals of Tourism Research*’ and ‘*International Journal of Wine Business Research*’ have been reviewed in relation to tourism diversification and wine tourism. Annual reports, published by the regional government (Regione Piemonte) regarding the tourism industry in Piedmont and the local tourism industry in Langhe have been reviewed. On the European level, the European Commission established various rural development programmes, relating to the reform of the Common Agricultural Policy (CAP). The EU rural development programmes for the periods 2000-2006, 2007-2013 and 2014-2020 have been examined with regards to the Italian and Piemontese agricultural sector. Similarly, national, regional and local government official websites revealed the macro and micro context, including *Italia.it (n.d.)*, the official website for the Italian tourism industry; *Piemonte in Cifre (2014)*, offering statistics in relation to the regional population, agriculture and tourism industry; *Piemonte Italia (2010)*, and *Piemonte Turismo (2015)*, dealing with the regional tourism development; *Consorzio di tutela Barolo Barbaresco Alba Langhe e Dogliani (2016)*, representing the local wine consortium; as well as *Consorzio Turistico Langhe, Monferrato, Roero (2012)*, representing the local tourism consortium.

Initially wine tourism was believed to be the core theme of this thesis. Within the literature, wine tourism was often referred to as rural tourism in its broadest sense – tourism located in rural areas. Concurrently, the concepts of ‘rural diversification’ and ‘tourism diversification’ emerged within the literature. Connecting both literatures of wine tourism and rural diversification, the focus was placed on reviewing researchers’ arguments and debates in relation to farmers’ motivations towards diversification in general and tourism diversification in particular. The main themes identified in the literature, notably wine tourism development, diversification and motivations for diversification form the basis for the generation of interview questions (see section 4.6.3. below).

#### **4.6.2. Phase 2 – Contextual Visit**

The contextual visit constitutes the second phase of the research process and was undertaken in July 2015. A number of targets were set for the contextual visit, notably conducting meetings with potential gatekeepers to inform them about the research process; undertaking direct observation and interacting with various stakeholders; reflecting on these experiences by keeping a research journal; and finally planning and organising interviews with wine producers for the third phase of the research process, notably the main primary data collection phase.

One of the principal targets of the contextual visit was to conduct a meeting with two potential gatekeepers, notably a local wine tourism manager and a private tour guide. Reeves (2010) argued that gatekeepers are the central component of access and depending on their backgrounds as well as their thoughts and beliefs they can help or hinder the researcher in obtaining relevant and accurate data. With regards to this research project, the local wine tourism manager was chosen as gatekeeper due to the fact that she is continuously interacting with tourists as well as local wine producers, having diversified into wine tourism. Being part of the tourism association ‘*Piemonte on Wine*’ she is in charge of promoting and booking winery visits and wine

tastings for tourists. Her office is located within the tourist information centre in Alba. Thus she is in contact with local wineries and is aware of tourists' needs and wants. She advised me on which wineries to contact and shared her experiences regarding wineries' motivations to open their doors to the public and accept tourists. She was also able to provide me with regional and local statistics regarding wine tourism development.

The second gatekeeper is an American private tour guide, living in the area for a considerable amount of time. In the past, she worked at various local wineries and recently, due to the increasing number of tourists visiting the area, she opened her own private tour guide company. She takes enogastronomic tourists, mostly American tourists on a privately guided tour around the area of Langhe. She visits various wineries and local restaurants corresponding to tourists' individual needs and wants. Thus, being in regular contact with local wine producers and having a substantial knowledge about the area, she advised me on and contacted various wine producers. I was given the permission to use her name when contacting wine producers. However, the fact that the two gatekeepers selected the majority of participating wineries could be seen as a potential bias and limitation of this research (see section 4.8.). Nevertheless, gaining access to wine producers on an individual basis proved to be relatively difficult, as will be discussed in section 4.8. on methodological limitations.

A further target of the contextual visit consisted of undertaking direct observation and interacting with local residents and business owners. Observation was regarded as particularly useful during the contextual visit phase of the research process, in order to provide the researcher with rich and vast amount of data (Guest et al. 2012). Langdridge (2007) highlighted the usefulness of observation as a valuable data collection method, having the potential to provide insights into participants' lives and reveal the construction of particular social settings (Mulhall 2003). Data gathered through conducting unstructured observation are open to researchers' own interpretations, having the freedom to choose what to observe and how to analyse what has been observed (Mulhall 2003).

Accordingly, unstructured observation and interaction with local residents allowed for an increased understanding of the macro and micro context in relation to the phenomenon under study. Especially, the interaction with local business owners and residents working in the wine and tourism sectors revealed the importance of place, including the agrarian mentality and the independent minded nature of the local population as important factors illustrating the local culture. One local resident highlights the agrarian and stubborn mentality in the region, especially amongst the older generation:

*“We come from Piedmont. We from Piedmont are very stubborn and we don’t like, or we didn’t like to show you what we were doing... this is the local mentality”* (local resident 2015).

Similarly, the second gatekeeper revealed the ‘closed’ mentality and sense of secrecy of the local wine producing community, as the following utterance demonstrates:

*“The Italian mentality is still quite closed. Winegrowers sometimes don’t see the long-term benefits of receiving tourists. Some wineries refuse to receive tourists if they don’t buy wine, whereas other wineries will accept every single person knocking on the door”* (second gatekeeper 2015).

The local community’s place attachment, including their predominant agrarian mentality turned out to be of major importance for the subsequent phases of the research process, particularly during the data analysis phase.

Furthermore, field notes gathered through observation and during the interaction with local residents were subsequently recorded and written into a research journal. “Recording events as they happen or shortly afterwards ensures that details, and indeed the entire event, are not lost to memory” (Mulhall 2003, p.311). Thus, this enabled me to create an account of my own experiences and reflections in relation to the particular research situation

(Nadin and Cassell 2006) and adds validity to the data (Engin 2011). Through keeping a research journal, the researcher was able to get a better understanding of the social, cultural, historical and geographical context, and thus, during the analysis stage, place participants' discourses within their particular context.

The final target of the contextual visit was concerned with organising interviews for the next phase of the research process, namely the primary data generation phase. This target however was difficult to achieve at that time due to the fact that the primary data generation phase was set out to start mid-August 2015 and wine producers were unable to confirm appointments a month in advance. Thus, only a small number of appointments were arranged (a couple of weeks) prior to the data generation phase, whereas the majority of interviews were organised on the ground, during the actual data generation phase.

Consequently, the contextual visit was a crucial first step in understanding the macro and micro context in relation to wine tourism diversification in Langhe. The interaction with a variety of stakeholders (wine producers, local residents, business owners, tourism sector employees etc.) was important in understanding the economic, social and cultural context in relation to this research.

#### **4.6.3. Phase 3 – Data Generation**

The main primary data generation phase was undertaken during the months of August and September 2015 and lasted for six weeks. Twenty-five qualitative interviews were conducted with wine producers in Langhe, which allowed for data saturation to be reached. It is worth mentioning that the harvest period in 2015 started earlier than expected (1<sup>st</sup> week of September) due to favourable spring and summer weather conditions. This meant that interviews with wine producers were conducted either shortly before or during the harvest period, which is undoubtedly regarded as wine producers' busiest

time of the year. However the majority of participants were willing to dedicate a couple of hours to welcoming me at their winery. Wine producers or family members working at the winery offered to conduct a winery tour and wine tasting prior to the interview. Being aware of the generally agrarian mentality of the local population, I decided to enquire about the different wine producers prior to conducting the interviews. This allowed me to show my interest in their winery, which made it easier to get a conversation started, as wine producers enjoyed sharing their passion and history, before initiating the interview. Interviews lasted for an average of 40 minutes, with the shortest one taking 23 minutes and the longest one for about 1 hour 15 minutes. Having identified a number of themes from the literature review, the interviews focused around these core themes, notably wine tourism development, diversification and motivations towards diversification, as highlighted in table 3.

Semi-structured interviews are considered most appropriate when focusing on these core themes and gaining deeper understandings of wine producers' experiences in relation to wine tourism diversification (Lester 1999). Alvesson's (2003, p.16) localist perspective in relation to semi-structured interviews is adopted in this research. He noted that an interview is "an empirical situation" that needs to be examined in its social context and should not be regarded as a tool for collecting data in isolation (Alvesson 2003; Qu and Dumay 2011). From a localist perspective, semi-structured interviews are used to highlight the importance of approaching the world from participants' perspectives (Qu and Dumay 2011).

With regards to this research, semi-structured interviews are used, focusing on particular themes rather than adopting highly structured questionnaires (Kvale 1983). While survey questionnaires have largely been used within the agricultural literature to reveal farmers' motivations and attitudes to diversification (e.g. Barbieri and Mahoney 2009; McGee and Kim 2004; Nickerson et al. 2001), gaining a deeper understanding of participants' lived experiences and what factors influence their motivations and attitudes to wine tourism diversification requires the use of a more flexible and face-to-face approach, notably qualitative semi-structured interviews.

<b>Core Research Themes</b>	<b>Interview questions</b>
<b>Wine Tourism Development</b>	<p><i>What trends (tendencies) have you witnessed in visits to your winery?</i></p> <ul style="list-style-type: none"> <li>- <i>What changes have you noticed?</i></li> <li>- <i>What are the reasons for these changes?</i></li> </ul> <p><i>What are the impacts of tourists on your winery?</i></p> <ul style="list-style-type: none"> <li>- <i>Can you provide some examples?</i></li> </ul> <p><i>How do you manage these impacts?</i></p>
<b>Diversification</b>	<p><i>Tell me about how you opened your winery to tourists</i></p> <ul style="list-style-type: none"> <li>- <i>Can you tell me how it happened?</i></li> <li>- <i>What did you do?</i></li> <li>- <i>How did your family feel about this decision?</i></li> <li>- <i>What kind of financial help did you receive?</i></li> </ul>
<b>Motivations for diversification</b>	<p><i>Tell me about what happened when you first received tourists at the winery.</i></p> <p><i>How do you perceive that tourists experience visits to your winery?</i></p> <p><i>What has been the best thing about opening your winery to the public?</i></p> <ul style="list-style-type: none"> <li>- <i>Can you give me some examples?</i></li> </ul> <p><i>How do you feel now about the decision you have made?</i></p> <p><i>Can you tell me about any challenges that you are (have been) facing as a winery and as a tourism venture?</i></p> <p><i>What reasons did you have not to open your winery?</i></p> <p><i>How do you see the future for your winery?</i></p> <p><i>How do you feel about further developing your tourism activities?</i></p>

**Table 3 - Interview Questions - 1st phase of data generation**

Interviews have been a prominent method in tourism research within the areas of destination planning, development and management as well as residents' attitudes and host-guest relationships. McGehee (2012) argued that



due to the complex relationship between stakeholders and the tourism industry, qualitative interviews are an appropriate technique to record diverse experiences and perceptions of tourism. Qualitative interviewers are interested in *how* participants describe their lived experiences rather than seeking to understand *why* participants have these experiences (Brinkmann 2013). Particularly, interview questions relating to the theme of 'motivations for diversification' were focusing on wine producers' lived experiences (see table 3). Participants were asked to describe their experiences in relation to wine tourism diversification. The majority of participants revealed their motivations for diversification by narrating stories of personal experiences with tourists during winery visits and wine tastings.

Depending on participants' reactions, comments and utterances, following questions might have been changed or dismissed, while additional/new questions might have emerged during interviews, guiding participants towards elaborating on various topics. This flexibility is important in "responding to the direction in which interviewees take the interview and perhaps adjusting the emphasis in the research as a result of significant issues that emerge in the course of interviews" (Bryman 2004, p.320). Open questions allow participants to choose experiences and narratives most important to them in relation to the research topic. In this instance, the researcher was able to learn about wine producers' daily challenges, family history and tradition as well as their perceptions regarding wine tourism development.

But why would someone share meaningful and personal narratives with a stranger? It has been argued that participants might have multiple reasons for contributing to a particular research project. Josselson (2013) claimed that some participants just want to be helpful, or are curious whilst others have the desire to tell their life stories. A number of authors increasingly highlight the importance and the crucial role of the researcher during the interview process. Their actions have a direct influence on how the interview process unfolds and to what extent participants engage in the discussion (Knapik 2006) (see section 4.5.2. on reflexivity above). When participants feel the interest and acceptance of the researcher during the interaction, they tend to be more

comfortable and likely to share deep feelings and emotions. Josselson (2013) referred to this as the 'stranger in the train' phenomenon, when one speaks and shares intimate and meaningful experiences with a stranger. In this regard, the interview is recognised as a collaborative process between the researcher and participant, where the narratives and stories are created through their interaction (Rubin and Rubin 2012; Tanggaard 2009). Similarly, from a localist stance it has been argued that both researcher and participant engage in the interview, "producing questions and answers through a discourse of complex interpersonal talk" (Qu and Dumay 2011, p.247).

Furthermore, twenty-three out of twenty-five interviews were digitally recorded and subsequently transcribed. Two participants declined to have their interview recorded and preferred the note-taking option. Participants were given the possibility to conduct the interview in Italian, French or English, as I am fluent in all three languages. The majority of interviews (22 out of 25) were conducted in Italian. Participants claimed to feel more comfortable speaking and expressing themselves in Italian rather than French or English. The interviews were subsequently transcribed and translated. The translation process is described in the following section.

#### **4.6.3.1. Translation**

Qualitative interviews with wine producers were conducted in Italian and subsequently transcribed and translated. Translation is defined as "the transfer of meaning from a source language to a target language" (Esposito 2010, p.570); in this case transfer of meaning from Italian to English. Fersch (2013) noted that at a time of permanent globalisation, cross-language qualitative research is becoming increasingly popular and more and more researchers have to engage in the process of translating qualitative interview data.

Contrasting perspectives can be discerned in the literature with regards to translation. On the one hand, it has been argued that researchers conducting a cross-language qualitative research may encounter translation dilemmas and difficulties (Temple and Young 2004; van Nes et al. 2010). Ideas, beliefs and perceptions expressed by participants in Italian could be understood and interpreted differently in the English language. On the other hand, Fersch (2013) reasoned that the process of understanding and interpreting data in a foreign language poses the same challenges and difficulties than in the mother tongue. In relation to this research project, neither Italian nor the English language is the researcher's mother tongue. Additionally, cross-language research might prevent the researcher from jumping too quickly to interpretations, as he/she might be less familiar with connotations compared to native speakers.

On a related note, it has been argued that the researcher forms an essential part of the interpretation and translation process (Pernecky and Jamal 2010). Meaning is constructed through the interaction of researcher and participants. In the translation process, this meaning must be maintained (Gadamer 2013). This implies that participants' utterances in the source language (Italian) are understood and interpreted by the researcher and transferred into the target language (English). Through the translation process, meaning is preserved in such a way that it is understandable for the reader (van Nas et al. 2010). In this regard, translation is referred to as interpretation (Gadamer 2013).

Understanding can only happen when researcher and participant communicate in the same language. "Conversation is a process of coming to an understanding" (Gadamer 2013, p.403). This indicates however that in a situation where participant and researcher do not speak the same language and have to make use of a translator (an external person to the research), understanding is unlikely to be achieved. With regards to this research, the researcher takes on a dual researcher/translator role. Researchers who are able to conduct the interviews in a foreign language and subsequently translate the data "are automatically best situated to do cross-language data analysis" (Temple and Young 2004, p.167).

Consequently, this section outlined the third phase of the research process, which was concerned with the generation of empirical data. Twenty-five qualitative semi-structured interviews were conducted with wine producers during a six-week period. The majority of interviews were conducted in the Italian language and subsequently transcribed and translated. The consecutive phase of the research process focuses on the analysis approach adopted in this research and will be discussed below.

#### **4.6.4. Phase 4 – Data Analysis**

This phase of the research process consisted of analysing the empirical data. Gibbs (2002) noted that the first thing distinguishing qualitative analysis from quantitative analysis is the form of data that is being analysed, namely language and text. From a subjectivist stance, language is essential in constructing human knowledge about the world, as reality is brought into existence through language (Cruickshank 2012). In this case, participants use language to share their experiences with the researcher, who is able to discover their realities and subsequently analyse and interpret them.

The translated data was transferred into the NVivo qualitative data analysis software (figure 11). NVivo was perceived to be more efficient in coding, organising and recalling data compared to manual methods (Hoover and Koerber 2010). It helps researchers to identify links, connections and relationships between different themes and sub-themes (Gibbs 2002).

Initially, participants' discourses were organised and grouped together into various related coded categories using headings such as 'Diversification - positive perspective', 'Diversification - negative perspective', 'Attitudes after diversification', 'Wine tourism', 'Financial help', 'Economic motivations', 'Wine tourists' and 'Community' (Clarke et al. 2009). The theme codes of 'Diversification – positive perspective' and 'Diversification – negative perspective' refer to wine producers' stories about positive and/or negative experiences with wine tourists at their winery. The code 'Attitudes after

diversification' relates to the benefits and disadvantages of receiving tourists at the winery. Additionally, the theme code of 'Wine tourism' indicates the general development of the wine tourism industry in Langhe whereas the code of 'Wine tourists' refers to how wine producers describe and depict different types of wine tourists.

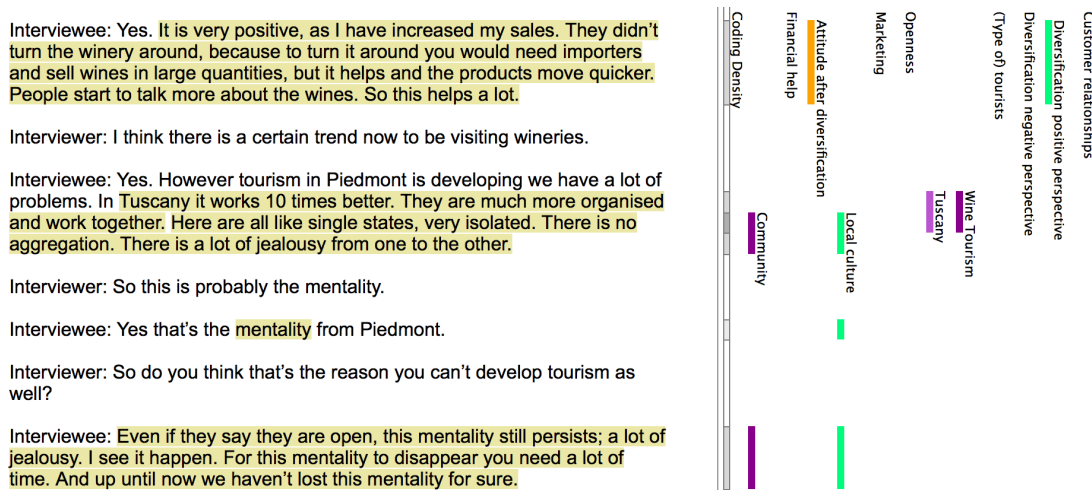
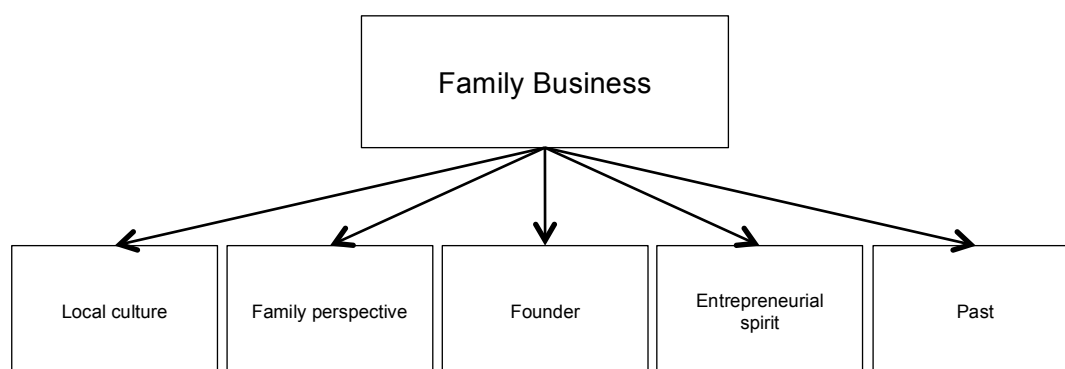


Figure 11 - NVivo themes

The initial thematic analysis of the empirical data was able to provide a better understanding of the core themes of 'wine tourism', 'diversification' and 'motivations for diversification'. The process of constant comparison was used "to see if the data support and continue to support emerging categories" (Holton 2010, p.27). It is important to note that new codes emerged, notably, 'founder', 'entrepreneurial spirit', 'family business', 'family perspective', 'past', and 'local culture', which did not relate to the core themes identified in the literature. These codes have been grouped together under the new main theme of 'family business' (figure 12). Wine producers' discourses revealed that the majority of wineries in Langhe are owned and managed by the nuclear family. The family occupies a central role in the winery, constituting the dominant coalition and holding the decision-making power. The emergence of the 'Family business' theme and correlating sub-themes was essential for the continuation of the research process and led to a re-examination of the literature, with a particular focus on the family business

literature. In this instance, data saturation was reached, due to the fact that nothing new emerged from the data and most of the data was coded by the existing codes.



**Figure 12 - Family Business Theme**

Consequently, while the thematic analysis revealed the emergence of new themes and sub-themes, the succeeding discourse analysis (DA) was used to analyse and interpret wine producers' discourses, particularly focusing on the analysis of language (Paltridge 2012).

#### **4.6.4.1. Discourse Analysis**

Discourse analysis (DA) underlines the essential role of language in qualitative research and analysis and can be defined as “the study of language in use” (Gee 2014, p.17). Fairclough (2003) highlighted the importance of language within social research and advocated the application of a discourse analysis approach. Crotty (2015) argued that “it is language, the way we speak, that is considered to shape what things we see and how we see them and it is these things shaped for us by language that constitute reality for us” (p.88). Language is fundamental in understanding and establishing multiple realities (Crotty 2015). This research aims at understanding participants' constructions of reality (Inheteven 2012) – their decisions to diversify into wine tourism. Accordingly, DA was used as it

allowed for an in-depth analysis of wine producers' accounts, with a particular focus on how and why they are producing these discourses in context.

Various DA tools and techniques have been identified in the literature, notably framing, omission, topicalisation, hedging, metaphors and pronouns in the construction of identity (Bloor and Bloor 2007; Huckin 1997) (see table 4). Framing plays an important role in the production and interpretation of data and analyses the kind of perspectives, viewpoints and angles taken by participants (Huckin 1997). Topicalisation is concerned with the meaning/topic of a discourse (Huckin 1997, p.83). The topic is frequently spread over a number of sentences, emphasising its significance. Hedging refers to “a linguistic avoidance of full commitment or precision” (Bloor and Bloor 2007, p.103). Hedging incorporates various tools such as approximators (e.g. *roughly, approximately sort of, more or less, about*), projecting verbs (e.g. *think, believe, suppose*) and modality (e.g. *may, might, could, should, possibly, probably*). Bloor and Bloor (2007, p.104) further argued that utilising the modal verb *would (be)* makes a particular statement less assertive and confident. Thus the use of the modal verb *would* is seen as a presumable ‘indicator of uncertainty’. Metaphors are defined as “making a comparison by transferring a name from one thing to another, ‘a shift, a carrying over of a word from its normal use to a new one’” (Bloor and Bloor 2007, p.69). They are used in our everyday conversations and interactions and are seen as an additional device for constructing meanings through language.

DA Technique	Description	Illustrative Example
<b>Topicalisation</b>	Topic of discourse: importance of the family	<i>“Surely the family has a <b>very important role</b>, because family companies are based on the <b>family relationship</b>, meaning that difficulties, and achievements are all reached <b>together</b>. Difficulties are overcome all <b>together</b>. If there are difficulties, you are <b>in a family</b> and you speak with <b>members of the family</b>” (Case 13)</i>
	Topic of discourse: Family-work conflict	<i>“But it is <b>hard work</b>. It is <b>very demanding</b>, very demanding and <b>challenging</b>. If I have 3 or 4 visits a day, I repeat every time the same story ... From <b>Monday to Saturday</b>; Sundays we are closed; even if many ask to do visits on Sundays. I don't have employees working on Sundays. Otherwise we <b>wouldn't have a life</b> anymore...” (Case 15)</i>
<b>Hedging (use of modality)</b>	Modality: modal verb 'would' to highlight uncertainty about generational change and transgenerational sustainability	<i>“For sure I <b>would</b> like my son, and also my brother's son to continue this activity, because exactly there is the history of the family, so it is the continuation of the family history. I don't know, my son is still small, he has 5 years, and my brother's son is 6, so now it is very difficult to say what they will be doing. Surely I <b>would</b> like them to continue” (Case 13)</i>
<b>Pronouns in the construction of identity</b>	Use of the pronouns 'we', 'us' refers to a strong family identity.	<i>“<b>we</b> want to work a certain way, and <b>we</b> also don't want to become too big that <b>we</b> need to have employees so... Exactly as <b>we've</b> done until now” (Case 9)</i>
		<i>“<b>We</b> like to stay a family business and <b>we</b> would like to manage the visits ourselves, without having to employ a person, who will do the visits for <b>us</b>. <b>We</b> believe it to be important” (Case 12)</i>
<b>Framing</b>	Framing of 'the other'	<i>“Not just for the wines but also something more, because so many wineries concentrate on the wines. So <b>we</b> try to offer something different that distinguishes <b>ourselves from the others</b>” (Case 2).</i>
	Framing of 'control'	<i>“The family's role is always of <b>leadership</b>. We don't</i>



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*intend to... we're managing **100% the directives**. We don't have a sales manager or outside people who direct and manage, and have **decision-making power**. We always want it to be us to bring the company forward. But then we have employees" (Case 28).*

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**Table 4 - DA Tools and Techniques**

Besides the close examination of language in socially constructing reality, DA is also concerned with examining text in context. Texts are embedded in their social, political and historical context and cannot be understood in isolation (Cheek 2004; Jorgensen and Phillips 2002). The wider context of participants' interpretations is crucial in qualitative data analysis (Gibbs 2002). With regards to this research, wine producers' discourses are embedded in their specific social context.

DA underlines the importance of reflexivity and takes into account the fact that the interaction between researcher and participants plays an important part in the construction of discourses (Phillips and Hardy 2002). This means that the role of the researcher is crucial in generating knowledge. The researcher forms part of the social context and influences participants' utterances through her questioning and interaction during the interview process. Her actions and questions have a direct influence on how the interview process unfolds and to what extent participants engage in the discussion (Knapik 2006).

DA is interested in "explaining how certain things came to be said or done, and what has enabled and/or constrained what can be spoken or written in a particular context" (Cheek 2004, p.1147). Adopting a subjectivist perspective, this means that the researcher is not only interested in the content of participants' discourses, but also how and why they are producing these discourses within a particular context. Considering the socio-cultural and historical context of wine producers allows the researcher to interpret the discourses differently and analyse why certain things have been said. Wine producers' discourses are strongly embedded in their particular historical and

family context. Place attachment, the local wine-producing community, the history of the winery and the family play a major role in how producers manage their winery and how they make decisions in relation to wine tourism diversification. Continuing the family winemaking tradition and having developed a strong place attachment and place identity are central characteristics influencing wine producers' discourses. Consequently, the social context plays an important part in understanding wine producers' behaviour and diversification decisions.

Thus, the 4<sup>th</sup> phase of this research process outlined the analysis approach undertaken, using thematic and discourse analysis. While thematic analysis revealed the content of wine producers' discourses and was considered the first step of the analysis process, discourse analysis allowed for a deeper understanding of the phenomenon under study, through revealing how and why wine producers engage in these particular discourses. Furthermore, new themes and sub-themes emerged during the analysis process, notably 'family business', 'the family perspective' as well as the importance of the 'past' and the 'founder' of the family winery, leading to a re-examination of the literature. While participants highlighted the importance of the family in the management of the winery, important gaps have been identified in the empirical data in relation to the generational change, the founder, the long-term orientation of family businesses, and the role of the family. Consequently, a second data generation phase was undertaken to fill these gaps.

#### **4.6.5. Phase 5 – Data Generation**

The second data generation phase was undertaken during the months of July and August 2016 and lasted four weeks. Fifteen interviews were conducted during that period. Second interviews were conducted with twelve participants in addition to the selection of three new participants. Qualitative interviews focused on the themes identified in the family business literature, notably, 'generational change', 'role of the family', 'founder' and 'long-term orientation' (table 5).

<b>Core Research Themes</b>	<b>Interview questions</b>
<b>Generation</b>	<p><i>What are you doing differently from the previous generation? (from your father's/your parents' generation)</i></p> <ul style="list-style-type: none"> <li>- <i>Can you provide some examples?</i></li> </ul> <p><i>What does it mean to you to be the owner of a family winery?</i></p> <p><i>Are you intending to pass the business on to the next generation?</i></p>
<b>Long-term orientation</b>	<p><i>What are your plans for the future?</i></p> <p><i>Where do you see the winery in 10 (or even 20) years?</i></p>
<b>Founder</b>	<p><i>Who was the founder? Can you tell me about the founder (1<sup>st</sup> generation) of the winery?</i></p>
<b>Family</b>	<p><i>What role does your family play in the winery's future?</i></p>

**Table 5 - Interview Questions - 2nd phase of data generation**

#### **4.6.6. Phase 6 – Data Analysis**

The final phase of the research was concerned with transcribing, translating and analysing the second set of empirical data. Similar to the first data analysis phase, thematic and discourse analysis were used to analyse the empirical data. While the thematic analysis allowed for the emergence of new themes, notably 'control', 'power' and 'culture', the discourse analysis approach, with its focus on language, revealed wine producers' continuous engagement in constructing a positive and coherent sense of self when discussing wine tourism diversification.

From a social constructionist perspective, it has been argued that identities are constructed discursively and that the social, historical, political and cultural context has to be taken into consideration (Alvesson et al. 2008). Individuals' identities are fluid, uncertain, changeable and fractured (Alvesson 2010; Clarke et al. 2009), due to an unpredictable and unstable social world (Alvesson and Robertson 2016). The use of language is essential in constructing and reconstructing wine producers' diverse and sometimes conflicting identities.

Accordingly, wine producers' self-constructions during the interview process play a central role in this research. While the initial aim of the research was to examine wine producers' prevailing motivations for and experiences of wine tourism diversification, wine producers' self-constructions emanated from the final analysis of the data as a central theme and provided a deeper understanding of wine producers' decisions to diversify into wine tourism. In this instance, it can be argued that the data steered the researcher's attention to the concept of identity.

During the interview process, and through engaging in narratives using particular discursive resources and tactics, wine producers can be seen to have constructed particular identities in order to 'show' the researcher who they are, what they value and how they want to be seen by others (Paltridge 2012). It is important to note that wine producers' identity constructions are influenced by the interaction with the researcher during the interview process. Depending on the different topics addressed and treated during the interview process, the construction of multiple identities has been witnessed in wine producers' discourses. Wine producers have constructed and adopted multiple, complex and sometimes conflicting identities during the interview process; meaning that these identities are not pre-given and are only constructed in a particular context or situation during the interview process (Paltridge 2012). Van Dijk (1998) distinguished between personal and social/group identities. As will be highlighted in chapter V (findings chapter), wine producers actively participate in constructing a positive sense of self when engaging in talk about wine tourism diversification. They draw on various discursive resources and engage in different types of identity work to construct their self-identities.

Consequently, this part of the methodology chapter outlined the different phases of the research process. As can be seen from the previous discussion, this study adopted an iterative approach, going back and forth between "transcripts, coded data files and relevant literatures" (Brown and Lewis 2011, p.877-878; Wodak 2004), in order to achieve the aim of this thesis. The

following section of the methodology chapter will discuss the ethical concerns and potential limitations in relation to this research.

#### **4.7. Ethical Concerns**

As in any other area of human activity, ethics and ethical behaviour form an important part during the research process (Veal 1997). While it is recognised that ethical concerns may arise throughout the research process, ethical issues are most likely to be encountered during the empirical data collection phase. However, before engaging in empirical data collection, institutional ethical approval was sought and granted.

A number of categories of ethical concerns/principles can be discerned when conducting social research, notably harm, lack of informed consent, deception, invasion of privacy and confidentiality (Bryman and Bell 2007; Kelman 1982). It is argued that these categories of ethical principles are inextricably connected, meaning that issues of deception and privacy for example are inextricably linked to causing harm to participants.

Harm refers to “temporary experiences of stress or discomfort”, which may be encountered by participants during the interview process (Kelman 1982, p.47). In order to prevent discomfort and stress for participants, the interviews started off with simple, straightforward questions in relation to participants’ role at the winery, the winemaking process and the different types of wine they produce. This made it easier to get a conversation started, as wine producers enjoyed sharing their passion and history, before initiating the interview. Additionally, the issues of privacy and confidentiality have to be addressed when conducting social research. Invasion of privacy was avoided through contacting participants by email and arranging the date and time for the interview at their convenience, without putting them under any pressure to participate in this research. In relation to the issue of confidentiality, participants were made aware of the fact that all information collected during interviews were kept strictly confidential and only the researcher carrying out

the research would be able to access this information. In this instance, pseudonyms have been used to preserve anonymity and confidentiality.

Furthermore, deception refers to “any deliberate misrepresentation of the purposes of the research, of the identity or qualifications of the investigator” (Kelman 1982, p.49), and was avoided through providing a *Participant Information Document* to participants prior to conducting interviews. The document contained information about the purpose of the research, any risks or benefits for participants in contributing to the research, as well as the contact information of the researcher. Participants had the possibility to withdraw from the research at any time, even during or after the interviews. After full explanation of the aim and purpose of this research, participants were asked to sign an informed consent form, stating that they understood the purpose of this research and agreeing to participate.

#### **4.8. Methodological Limitations**

While the methodological approach adopted allowed for the emergence of new insights and deeper understandings of wine producers’ decisions to diversify, potential methodological limitations of this study are addressed in this section, notably the discourse analytical approach, the role of the researcher, the sampling strategy as well as the role of the two gatekeepers. It could be argued that these limitations are inextricably linked, due to the subjectivist approach adopted to conduct this research.

First of all, discourse analysis is seen as a social process involving the researcher. In this instance it has been argued that the researcher forms part of the social context and is likely to not only influence the research process, but also participants’ utterances/responses during the interview process. The researcher’s social position is likely to influence the interpretation of these discourses. This could be perceived as a limitation due to the fact that the researcher is unable to adopt an objective, detached position.

Secondly, participants for this research were predominantly chosen by the two gatekeepers, which can be perceived as a limitation. However it is important to note that the researcher attempted to gain access to additional wine producers on an individual basis, which proved relatively difficult. It could be argued that family wineries' unwillingness/reluctance to participate in this research study is likely to have been influenced by the prevailing agrarian mentality and the sense of secrecy amongst the local wine-producing community. While the role of gatekeepers could be seen as a limitation, they proved highly valuable for this research study.

Furthermore, all the participants selected for this research have engaged in wine tourism diversification and offer at least one tourism-related activity at their winery. Non-diversified wineries were contacted but were unwilling to participate in this research study. This could be seen as a further limitation, as the study focused on diversified family wineries and omitted the wineries, which have not engaged in wine tourism diversification. However, further research in this area could respond to certain of these potential methodological limitations and will be discussed in chapter VII (conclusion chapter).

#### **4.9. Chapter Summary**

This chapter outlined the philosophical assumptions underpinning this research as well as the research process adopted, in order to achieve its aim and objectives. It has been argued that in order to gain a deeper understanding of the motives underlying family wineries' wine tourism diversification decisions, this research embraces a multiparadigmatic approach, by adopting a subjectivist dimension to social science and a mid-way position between order and conflict in relation to the nature of society. Through adopting a multiparadigmatic approach and moving away from the predominant functionalist perspective adopted within the family business literature, this research is able to contribute to recent debates and extend current understandings of diversification decisions and motivations. It has

been argued that motivations for diversification have up until now predominantly been researched from the conventional lens of economic effectiveness, underpinned by a functionalist perspective.

In line with a subjectivist perspective, qualitative semi-structured interviews have been used as a way to obtain in-depth knowledge from actively engaging in conversation/talk with wine producers. Only through interacting with participants is the researcher able to learn about and understand wine producers' multiple realities, constructed through their lived experiences.

Consistent with the data-driven approach adopted to conduct this research, a thematic and discourse analysis approach allowed for the emergence of new/additional themes and helped to gain a deeper understanding of wine producers' decisions to diversify into wine tourism. Consequently, these research methods outlined in this chapter allowed for the generation of an extensive and rich data set, which is rigorously analysed in the following chapter (Chapter V – Findings Chapter).



## **5. Chapter V – Findings Chapter**

### **5.1. Introduction**

This chapter aims to examine the motives underlying family wineries' decisions to diversify into wine tourism. A discourse analytical approach has been adopted to analyse the data. As was shown in the methodology chapter, various discourse analysis tools and techniques have been used for the thematic analysis of wine producers' discourses, notably framing, topicalisation, and pronouns in the construction of identity (Bloor and Bloor 2007; Huckin 1997).

The first part of the findings chapter outlines the various diversification activities adopted by family wineries in this case study, and examines the economic and social motives influencing family wineries' decisions to diversify into wine tourism. This section argues that when diversifying, family wineries are not primarily concerned about financial gains and goals, but also value nonfinancial goals, thus emphasising the complex interplay between social and economic/financial motives.

Besides the fact that family wineries engage in diversification to pursue financial and/or social goals, the inductive analysis of the data reveals that when engaging in talk about wine tourism diversification, wine producers participate in forming a positive and preferred sense of self. The second part of the findings chapter thus examines how wine producers' identities are constructed through discourses about wine tourism diversification. The analysis reveals that diversification decisions are inextricably linked to and influenced by the construction of wine producers' identities. It is argued that wine producers actively position themselves on a continuum of wine producer identities, ranging from 'traditional' to 'entrepreneurial'. Furthermore the complex interplay between identity work and identity regulation in constructing wine producers' identities is examined.

## 5.2. Wine Tourism Diversification Activities

As established earlier, the wine tourism industry in Langhe has continuously developed over the past 10 to 15 years, and has attracted an increased number of tourists to the region. Numerous wineries have recognised the continuous development of the local tourism industry as a potential opportunity, and decided to diversify into tourism. Table 6 outlines the various diversification activities adopted by wine producers.

Case	Wine tastings	Winery Visits	Cellar Door Sales	B&B	Other
1	✓	✓	X	X	
2	✓	X	✓	✓	
5, 7, 8, 10, 14, 15, 17, 18, 21, 23, 25, 27, 28	✓	✓	✓	X	
6	✓	✓	✓	X	Camping
4	✓	✓	✓	X	Local sightseeing tours
12, 13	✓	✓	✓	X	Group lunch
9, 19, 20, 24, 26	✓	✓	✓	✓	
3	✓	✓	✓	✓	Restaurant

**Table 6 - Wine Tourism Diversification Activities**

The most prevalent wine tourism diversification activities adopted by wine producers in Langhe include winery visits, wine tastings, cellar door sales and agritourism businesses (B&B). As highlighted in the methodology chapter, only participants having engaged in wine tourism diversification have been selected for this case study (n=28) to examine family wineries' decisions to wine tourism diversification. Thus, all participants have developed at least one tourism activity to attract tourists to their winery. As highlighted in table (6), all participants have developed the diversification activity of wine tasting at their winery. Similarly, all participants, with the exception of case 1 and 2, offer in combination with wine tastings also winery tours and cellar door sales. In

order to receive tourists at the winery for wine tastings and visits, wine producers had to restructure parts of their wineries or invested in the construction of new winery buildings. In addition to offering these diversification activities, 7 participants have gone a step further and invested in the development of an agritourism business (B&B) as part of their diversification activities. Most B&Bs have been built adjacent to the wineries. Furthermore, a number of wineries developed distinct diversification activities over the years besides wine tastings, winery visits and cellar door sales. These diversification activities include local sightseeing tours (case 4), camping possibilities (case 6), restaurants (case 3), hosting of events and group lunches (case 12, case 13).

After delineating the various diversification activities adopted by wine producers in this case study, the following section examines wine producers' accounts to reveal their economic and social motives influencing wine tourism diversification decisions.

### **5.3. Wine Tourism Diversification Decisions**

The analysis of the data reveals that wine producers' diversification decisions are guided and influenced by different motives. Wine producers' accounts reveal various, sometimes conflicting motives for engaging in wine tourism diversification. While certain wine producers predominantly highlight their financial/economic motives for wine tourism diversification, others reveal the importance of social/nonfinancial motives, as well as combining social and economic motives (table 7). The following section will examine wine producers' economic as well as social motives for wine tourism diversification before discussing the complex interplay between these two types of motives, illustrated by a case vignette.

Motives	Illustrative Evidence
<b>Social motives</b>	<p>"We <b>don't need them</b>. But ... even if we don't sell any wine, they can still be an <b>ambassador</b>" (Case 1)</p> <p>"It is more important to <b>keep relationships</b> with consumers... much more than the 2 bottles I would sell at the winery, they are not making me rich" (Case 14)</p> <p>"So for me it is that people can have an <b>experience</b>" (Case 19)</p> <p>"To <b>create a bond</b> with people. Show the people our way of working, try to explain them our philosophy and our tradition and <b>create this relationship</b> with the consumers" (Case 23)</p>
<b>Economic motives</b>	<p>"The <b>economic effects</b> that we see here at the winery; this is the <b>maximum price</b> that you can achieve, because it is the end consumer; <b>direct payment</b>". "It is an important part of the business also in relation to the sales to our <b>direct sales</b>" (25% of winery revenue) (Case 3)</p> <p>"It is <b>another sales channel</b> compared to importers, restaurants or wine shops. And one of the best as you <b>sell directly</b>, without intermediaries" (Case 4)</p> <p>"Because we understood that the people that come here, even if they just buy 2 bottles, they take them and <b>pay</b> for them <b>directly</b>" (Case 6)</p> <p>"This is the idea of this new winery building is that the <b>private client</b> is very important" (case 13)</p> <p>"It is also important to note that tourists come here, buy the wine at <b>full price</b>, pay cash and take it home; so no problems for me" (case 25)</p>
<b>Combination of social and economic motives</b>	<p>"I believe that it is important for the end consumer to get the <b>experience</b> of seeing and visiting the winery" (social). "A very positive response, especially in relation to <b>margins</b> and <b>publicity</b>" (economic) (Case 5)</p> <p>"People come here.. it's a nice thing. Maybe they don't buy anything, they pay for the wine tasting, but I've explained and I've showed you, and that's important. It's a <b>culture</b>, it's a nice thing" (social). "Very important for the winery ... they come here, they buy and do the <b>marketing</b> for you ... To tell you the truth, we're almost selling 50% of our wines at the winery" (economic) (Case 7)</p> <p>"To have a <b>direct contact</b> with the consumers and to even have <b>personal relationships</b> over the years; the people that return they became our friends" (social). "So the <b>sales at the winery</b> are between 25 and 30% of our production. So it is very important for us" (economic) (Case 8)</p>

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*"I'm very inclined to receive tourists here; show them around and let them try my wine". "(They) came to visit the winery, and we also became **friends**" (social). "It is very positive, as I have **increased my sales**". "It helps and the products move quicker. People start to talk more about the wines. So this helps a lot" (economic) (Case 17)*

*"For us it is very important that the people come here ... So there is a story behind a glass of wine. And when they go back home, they are our **ambassadors**. So this is the general philosophy" (social). **Direct sales** are "quite important. We also offer wine shipments, for people that maybe can't travel with wine bottles" (economic) (Case 24)*

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**Table 7 - Motives for Wine Tourism Diversification**

### **5.3.1. Economic Motives**

Examining firstly the economic motivations for diversification, participants' accounts reveal that combining the diversification activities of wine tasting and cellar door sales is likely to lead to increased financial performance of the winery. From an economic perspective, wine tourism diversification activities are recognised as important additional sales opportunities. This is due to the fact that wine producers are able to sell their wines at higher prices at the winery than they would to distributors, importers and/or restaurants. Similarly, the wine producer in case 4 considers wine tourism activities (e.g. wine tastings, cellar door sales) to be "*one of the best*" sales channels as "*you sell directly, without intermediaries*".

Thus, cellar door sales result in direct payments. Whereas payments from distributors, importers and restaurants might take a couple of months, private clients pay directly at the winery at the time of purchase. The wine producer in case 6 notes that "*even if they just buy 2 bottles, they take them and pay for them directly*". In this instance, the private client is recognised as an additional source of income. The only way to take advantage of this additional source of income is through wine tourism diversification. From this perspective, attracting tourists to the winery is giving wine producers the possibility to increase their profits and performance. Thus, their motives are predominantly economic/financial in nature.

Furthermore, the importance of the revenue from direct sales varies amongst family wineries and is likely to influence wine producers' motives for diversifying into wine tourism. The wine producer in case 3 for example indicates that 25% of the winery's revenue derives from cellar door sales. For the winery in case 7, cellar door sales represent nearly half (50%) of the revenue. Consequently, it could be argued that for these wine producers wine tourism diversification is predominantly guided and influenced by economic/financial motives. By comparison, cellar door sales represent only 5% of the winery's revenue for case 10 and 3% for case 19. Their discourses display predominantly social motives for diversification.

### **5.3.2. Social Motives**

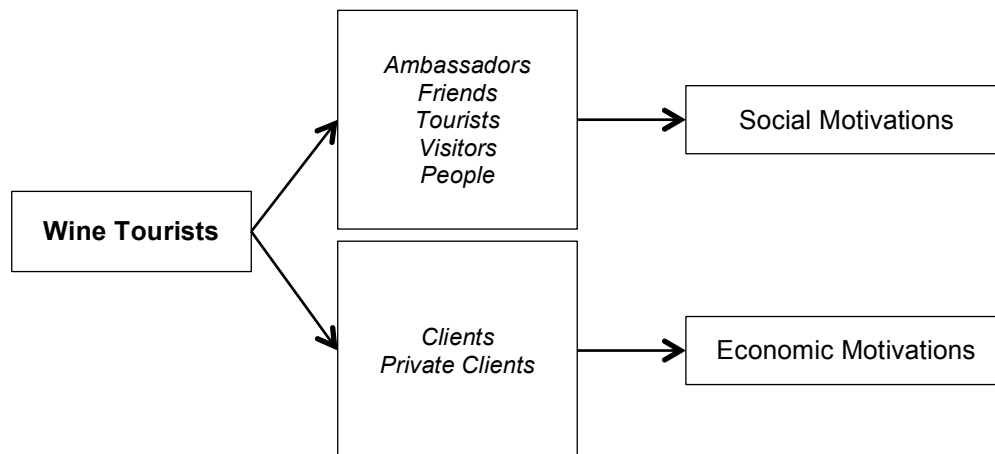
The previous section revealed that the importance of the revenue from direct sales influences wine producers' motives for diversifying into wine tourism. While the discourses indicate that economic motivations for diversification are likely to gain in importance the higher the revenues from direct sales, evidence shows that due to wineries' high export level, which can reach up to 85% for some wineries (case 18, 20), wine producers are economically stable and diversification into tourism is not recognised as a necessity, and therefore not primarily linked to financial motives. In this instance, wine producers choose to diversify into tourism and offer certain activities such as winery tours and wine tastings in order to share their passion with visitors, offer them an experience and educate them. Their motives for diversifying into wine tourism are predominantly socially driven.

The winery in case 19 for example is exporting 80% of their wines, selling 17% in Italy, whereas only 3% of the winery's revenue derives from cellar door sales. Thus, diversification into tourism is not considered a priority/necessity for this winery. The wine producer delineates social motives for diversification and argues that people from around the world are coming to visit his winery to get a 'cultural experience', as the following discourse reveals:

If they (tourists) don't buy that's not a problem... So for me it is important that people can have an **experience**. So that people can really know the wines, meet the people, have a look at the vineyard and look at the winery. You see the cask and the bottles, no more, so that people can understand our style of winemaking. And where you can have a **cultural experience**. That is important for me; you know...We have high respect for tourists. So sometimes we have to open new bottles, so really because it is a **kind of passion**. But we don't want to use tourism to make more sales here (Case 19)

Looking at this excerpt of a social discourse it becomes evident that it differs from a financial/economic discourse, illustrated in table 7. Most importantly, the wine producer refers to tourists as '*people*'. Social discourses tend to denote wine tourists as '*ambassadors*', '*people*', '*friends*' and/or '*visitors*' whereas economic discourses refer to wine tourists as '*clients*' or '*private clients*' (see figure 13). The emergent discourse is that the wine producer (case 19) is passionate about his work and motivated to share his passion with wine tourists.

Figure 13 - Wine Tourists



Additionally, from a family business perspective, the analysis of the data reveals a number of social motives, influencing family wineries' decisions to diversify into wine tourism, notably the need for family control and the employment of family members. Firstly, family control has emerged as an essential social motive influencing family wineries' decisions for wine tourism diversification, as the following discourse demonstrates:

*“**We** would like to manage the visits ourselves, without having to employ a person, who will do the visits for us. **We** believe it to be important” (Case 12)*

The use of the pronoun 'we' in the discourse displays the decision-making power of the family. The notion of control plays a major role in the construction of this discourse. The family wants to stay in control of the various tasks in the winery, notably the winery visits. The discourse manifests the wine producer's reluctance to hire nonfamily employees and delegate authority. The level of wine tourism diversification is thus influenced by the need to keep family control.

Similarly, the wine producer's discourse in case 15 reveals the importance of family control when referring to wine tourism diversification. She expresses her reluctance to pursue wine tourism in order to keep family control:

*“I **wouldn't be** able to also run an agritourism business, because that would be **too much**. Then I would need to get employees and I live here as well. No. That would be **too much**” (Case 15)*

The discourse uses words with negative connotations, notably '*wouldn't be able*' and '*too much*', to highlight the wine producer's reluctance to pursue wine tourism diversification. In this instance, the family has limited their diversification activities to keep family control, as pursuing wine tourism diversification would result in a loss of control over the additional tourism activities.



Secondly, the employment of family members has emerged as an important social motive in relation to wine tourism diversification. The analysis of the data reveals that the family situation, particularly the employment of family members at the winery influences wine producers' diversification decisions.

*"I have 2 sisters so we are 3 from the new generation. So for them (parents) it was important whoever decided to join the company that we would have our specific role ... So the business aims to grow, we're currently investing, for example in the construction of the restaurant"* (Case 20)

The discourse reveals the family's willingness to diversify into wine tourism. The family decided to pursue diversification activities in order to include the new generation in the family winery. Thus, the family is still able to retain complete control over the various business units.

Consequently, when comparing and contrasting wine producers' discourses in relation to their economic and social motives for diversification (table 8), it becomes evident that social discourses use words with positive connotations to describe tourist visits at the winery, notably, '*satisfying*', '*rewarding*', and '*nice*' (highlighted in bold). Pietro (wine producer in case 17) underlines the importance of '*building a relationship*' with tourists and offering them an '*experience*'. Some tourists coming to visit his winery have even become his '*friends*'. By comparison the wine producers in case 12 (Chiara) and case 15 (Elena) provide a different discourse when referring to wine tourism diversification activities. They recognise the importance and benefits of winery visits as a way of '*making them (tourists) loyal*' and '*promoting their wines*'. Consumer loyalty and increased promotion are their main motives for diversification. Thus, both discourses (case 12 and 15) are primarily underpinned by economic motives.

Motives	Discourse
<b>Social discourse</b>	<i>"If someone comes to the winery to have a tour and try the wines, it is more <b>satisfying</b> than someone calling to receive 2 boxes of wine ... there is a <b>relationship</b>, it is <b>nice</b> and more <b>rewarding</b>; also for the self-esteem"</i> (Case 17)
<b>Economic discourse</b>	<p><i>"We ask our importers to bring clients to the winery, because we believe it to be very important. It is a real strength. Firstly to <b>make them loyal</b> and let <b>clients</b> know the story behind the wine"</i> (Case 12)</p> <p><i>"Visiting the winery will give an experience to tourists that they can <b>talk about</b> and <b>promote our wines</b> and maybe even drink our wines back home. So that's important"</i> (Case 15)</p>

**Table 8 - Contrasting economic and social discourses**

However, even though wine producers' discourses reveal either social or financial motives for diversifying into tourism, it could be argued that certain wine producers display a complex set of economic, personal and social motives, as outlined in table 7. The following section highlights this complex interrelationship between wine producers' economic and social motives for diversification.

### **5.3.3. Combination of Economic and Social Motives**

After having revealed wine producers' economic and social motives for diversification, a number of wine producers display a complex set of both social and economic motives for diversification. The following vignette illustrates this complex interplay between the two types of motives.

## Vignette – Case 17

Case 17 is a small family winery, currently owned and managed by Pietro, representing the third generation of the family business. The family winery is situated in the small village of Diano d'Alba, about 10km away from the more touristic village of Barolo. Their annual wine production reaches up to 30000 bottles, which is considered a small-sized winery for the Langhe area.

The family decided to diversify into tourism in 2010. They restructured the winery to offer winery visits, wine tastings and cellar door sales.

Pietro argues that tourism development in the area is a relatively recent phenomenon and local people still need to alter their mentality and culture to adapt to the increase of tourists to the area. He criticises local wine producers for displaying a relatively 'closed mentality' and believes that some local wine producers are still reluctant to open their winery to tourists. *"Even if they say they are open, this mentality still persists; a lot of jealousy ... for this mentality to disappear you need a lot of time. And up until now we haven't lost this mentality for sure"*. However Pietro argues that he developed an open mentality, due to the fact that he had a different job before taking over the winery from his father and uncle. *"So my mentality opened completely. If you stay only here, the problem is that your mentality stays closed. If you start to move a bit, go abroad, discover new things your mind will open"*. Whereas other local wine producers are reluctant to open their winery to tourists, he states: *"I'm very inclined to receive tourists here; show them around and let them try my wines. After, if they like them, they can buy the wines"*.

Pietro considers diversification into tourism, especially cellar door sales, to be beneficial due to the fact that they have increased the winery's revenue. *"It is very positive, as I have increased my sales"*. He further argues that *"it helps and the products move quicker. People start to talk more about the wines. So this helps a lot"*.

Moreover, wine tourism diversification has increased the winery's visibility. Pietro indicates that this is due to the fact that *"more people know our winery ... people come here, take pictures ... (and) make the winery more known. It has a much higher impact towards the consumer"*. *"You go to a winery, you try the wines, you like them, and you speak to people about your experience ... A lot of times people arrive because someone else has recommended the winery to them. The possibility of this happening is very high"*. He believes that wine tourism diversification is only beneficial and viable if wine producers know how to communicate with consumers and how to promote and sell their wines. *"If you don't know how to build and keep relationships you are finished"*.

While the wine producer recognises the economic benefits from diversifying into wine tourism, his motivations for diversification have also been socially driven. He notes that diversification into tourism *"is definitely more satisfying. If someone comes to the*

*winery to have a tour and try the wines, it is more satisfying than someone calling to receive 2 boxes of wine ... there is a relationship, it is nice and more rewarding; also for the self-esteem. If someone comes to the winery it is always much nicer”.*

Furthermore, he does not charge for winery visits and wine tastings and receives tourists even without prior appointments. *“The moment we are here we are open; if needed I will also open at night. I’m always open. If you come Saturday lunch time, or Sunday evening at 8pm we are always open”.*

**Vignette 1 - Economic and Social Motives for Diversification**

The vignette presented above, illustrates the complex interplay between social and economic motives for wine tourism diversification. Pietro’s situation is quite unique due to the fact that his initial career path took him away from home and away from the winery, starting to work in the IT sector. It was only when his father encountered health problems, and the family considered selling the winery if there was no generational change that Pietro decided to take over the family winery and follow into the footsteps of his father.

As outlined in the vignette above, the discourse displays both social and economic motives for diversification. From an economic perspective, wine tourism diversification, especially cellar door sales are recognised as an important strategy to increase the winery’s revenue, especially for small production wineries. The discourse uses words with positive connotations when referring to his economic motives for wine tourism diversification. He argues that diversification is *‘very positive’*, *‘it helps a lot’*, it has *‘increased his sales’* and *‘the products move quicker’*. Even though he states that from an economic perspective wine tourism diversification has not turned around his business, he recognises the small but essential financial benefits linked to the various diversification activities.

Linked to the economic motives for wine tourism diversification is the increased visibility of the winery and the fact that *‘you speak to people about your experience’*. Word-of-mouth is identified as a powerful marketing tool to attract a growing number of tourists to the winery. Furthermore, diversification activities such as winery visits and wine tastings allow for the creation of a relationship due to the face-to-face contact with consumers. Sharing their

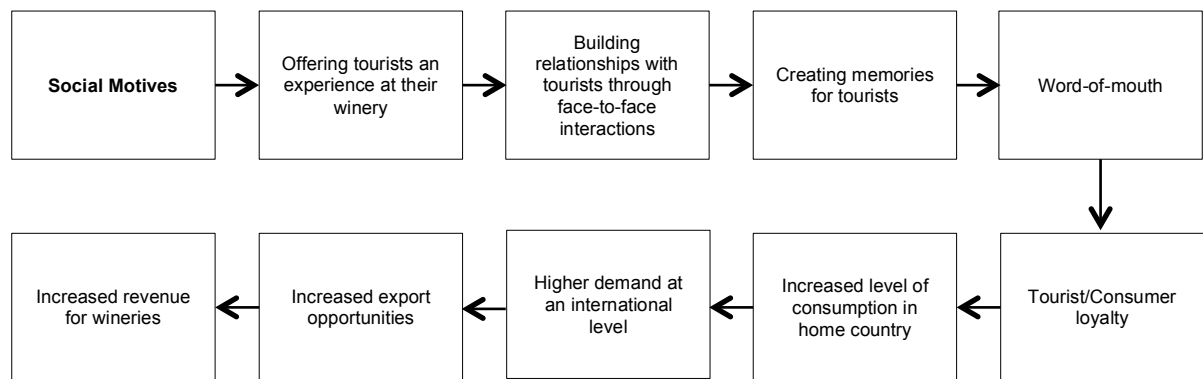
passion with consumers, the wine producer is able to create a long-term memory for tourists. In this instance, wine tourism diversification is recognised as an important marketing strategy allowing the wine producer to achieve consumer loyalty, improve the winery's visibility and ultimately increase the sales and revenue.

From a social perspective, Pietro highlights his satisfaction in relation to wine tourism diversification. His discourse indicates a high level of flexibility in relation to the winery's opening hours, notably: "*the moment we are here we are open*". The discourse implies Pietro's willingness and readiness at any time during the day to receive tourists at his winery. He displays a favourable attitude to wine tourism diversification and perceives it to be '*rewarding*' as he is able to build relationships and make friends.

However, it could be argued that even though wine producers' discourses reveal social motives for diversification, the underlying assumptions of diversifying into tourism and offering tourists an experience are ultimately linked to increased revenue for wineries (figure 14). It could be argued that social motives for diversification, such as offering an experience to tourists, sharing their passion with tourists and creating long-term relationships, are inextricably linked to economic benefits for the family wineries. Wine producers are aware of the fact that diversifying into tourism and opening the winery to the public is likely to lead to higher demands at the international level, even though their initial motivations are socially driven. Receiving tourists from all over the world is considered an efficient marketing strategy to promote their wines at the international level, without having to leave the winery.

Additionally, wine tourism diversification is recognised as a catalyst for increased brand awareness, growing levels of wine consumption and increased wine export opportunities. As presented in figure 14, wine tourism diversification is inextricably linked to increased export opportunities for wineries. In this instance it could be argued that wine producers adopt a long-term orientation with regards to wine tourism diversification. Even though wine

producers' motivations for diversification might initially be socially driven, as cellar door sales are not considered a necessity or priority, they are aware of the fact that in the long run, they are likely to benefit economically from wine tourism diversification due to their increased visibility.



**Figure 14 – Initial Social Motives leading to Economic Motives**

The first part of the findings chapter has examined the social and economic motives influencing wine producers' decisions to diversify into wine tourism. This section has argued that wine producers' decisions for diversification constitute a complex interplay between both economic and social goals. Even though wine producers might initially engage in wine tourism diversification for social reasons, it has been argued that they will recognise the economic benefits of wine tourism diversification. Consequently, it becomes increasingly challenging to clearly separate economic motives from social motives for diversification.

It has been argued that the economic-social dichotomy is unable to reveal potential deeper, subconscious motives underlying family businesses' decisions to engage in diversification. The inductive analysis of the data reveals that wine producers' diversification decisions are inextricably linked to their identity formation. Discourses about wine tourism diversification can be seen to have been drawn upon to construct a distinctive, coherent and desired sense of self, which in turn influences their decisions to wine tourism diversification. Consequently, the following part of this chapter examines how

wine producers' identity formation is inextricably linked to their decisions to diversify into wine tourism.

#### **5.4. Wine Producers' Identity Formation**

This part of the findings chapter will analyse wine producers' identity formation and its influence on their decisions to diversify into wine tourism. The notion of identity work is examined, highlighting wine producers' agential role in constructing their preferred self-identities when relating to wine tourism diversification. Furthermore, this part of the findings chapter will also outline how, besides engaging in identity work, social/cultural norms and traditions set by the families and the local community influence and shape wine producers' identities.

##### **5.4.1. Identity Work**

This section illustrates how wine producers can be seen to have been acting agentially when engaging in identity work to reveal their feelings and attitudes towards wine tourism diversification. As the earlier review of the literature established, identity work is the on-going engagement of individuals "in forming, repairing, maintaining, strengthening or revising the constructions that are productive of a sense of coherence and distinctiveness" (Svensingsson and Alvesson 2003, p.1165). It has been argued that individuals engage in identity work to respond to the question '*who am I?*' and to construct a preferred, desired and strong sense of self (Alvesson 2000; Brown and Coupland 2015; Sveningsson and Alvesson 2003).

The analysis of wine producers' discourses reveals that they say something that can be interpreted as a process of actively engaging in constructing a positive sense of self and position themselves on a continuum of wine producers identities, ranging from 'traditional' to 'entrepreneurial'. When constructing traditional wine producer identities, participants highlight their unfavourable attitude and unwillingness to diversify into wine tourism.

However, when participants construct their self-identities as entrepreneurial wine producers, they emphasise their favourable attitude and willingness to pursue wine tourism diversification.

The following section presents two contrasting vignettes, highlighting the differences between an illustrative traditional wine producer identity and a typical entrepreneurial identity. While the first vignette (case 15) illustrates how the participant engages in identity work to construct a traditional wine producer identity and show her negative attitude and reluctance to pursue wine tourism diversification, the second vignette (case 20) displays how the participant adopts an entrepreneurial identity when revealing his willingness to pursue diversification activities.

#### 5.4.1.1. Traditional Wine Producer

##### Vignette – Case 15

The winery in case 15 is a small family winery, currently owned and managed by Elena and her husband Luca, representing the fourth generation. Both are in their late forties and have been working in and managing the winery for over twenty years. Recently, Elena and Luca's daughter joined the company and is in charge of the marketing aspects of the winery. Their annual wine production reaches up to 85000 bottles, which is considered a small-sized winery for the Langhe area.

When they relocated the winery at the beginning of the 1990s, the couple decided to diversify into tourism and developed the activities of winery visits, wine tastings and cellar door sales. During the initial years of wine tourism development in the area, Elena revealed that *"the wineries were very limited/restricted"*, meaning that many wineries did not possess the necessary resources to diversify into tourism. Tourists were still scarce, *"but there was a bit of private tourism, obviously not like today, it was much more limited"*. Elena describes the current situation with regards to wine tourism development as follows: *"I think there is mass tourism on its way, especially in September"*.

The winery is located just outside the famous village of Barolo on top of a hill, overlooking the vineyards, and it could be argued that due to its favourable location and visibility, attracts numerous tourists. *'Private tourists'* were always accepted at the winery, however with the increased number of tourists, the family started to introduce some *'rules'* to be able to manage the various wine tourism diversification activities. Elena states: *"we started to introduce some rules, which everyone does"*



around here. We introduced some rules, as we are only a few people working in the winery". One of the rules consisted of limiting/reducing the winery's opening hours. The family decided to open the winery for visits and wine tastings "from Monday to Saturday. Sundays we are closed; even if many ask to do visits on Sundays ... Otherwise we wouldn't have a life anymore". Elena's irritation in relation to wine tourists becomes evident when she highlights that "people don't seem to realise that. People that are asking for visits on a Sunday, think we are here to entertain. I don't know. But I also have a private life".

Another rule introduced by the family in relation to wine tourism diversification relates to their unwillingness to accept tourist busses and large tourist groups. "We are not equipped; our facilities are not equipped to receive large groups. And I don't want to receive them. I don't want people who eat, get drunk and chat". She further argues: "when you come here we are offering a professional service, you are listening to what I'm explaining and saying and I expect during a wine tasting that when I'm explaining the people are quiet. With tourist busses this is not possible".

Consequently, the family decided to put a limit to the number of people per group: "10 people are already challenging and demanding. So they need to be very discrete and attentive and follow me. If I have 10 people the visit can last up to 3 hours ... So they have to respect the time that we dedicate to them. Otherwise I am unable to offer them a professional service".

Finally, a fairly recent rule, which Elena and Luca introduced, but also the majority of wineries in the area due to the increased number of tourists is "to pay for wine tastings". Elena recognised that "free of charge doesn't work. So for me the wine tasting and visit last for about one and a half or two hours. So those who don't buy have to pay for the wine tasting. I have offered a service on a request. For me it doesn't make sense not to pay for a wine tasting".

However this situation has led to a number of negative experiences. Elena told the story about her most recent negative experience when introducing the wine tasting fee at the winery:

*"Well the latest one unfortunately was an American tourist, last year, who really wanted to come to visit the winery. It was during the month of October, so I didn't have any free time, so I told him to come and join another couple. So that was fine. He arrived and we did the visit and wine tasting with the other couple. I think we opened 5 or 6 bottles of wines for the wine tasting. Afterwards he got up, thanked me and wanted to leave. So I told him that if he doesn't buy any wine he would need to pay for the wine tasting. So he started screaming: 'No this is not possible. I am not paying anything'. So I told him that if he doesn't buy he has to pay. So he took 20€ and threw it in my face. So that was too much. I didn't expect this from an American tourist. I felt really bad about this experience".*

These and other negative experiences have led to the fact that she does not want to conduct winery visits and wine tastings anymore and the family decided to hire a nonfamily employee to be in charge of the wine tourism diversification activities: *“I have done this work for a number of years now and I feel that I need to be replaced. Maybe someone younger, who is passionate about it. For me it’s becoming too demanding. We have a young employee who is very enthusiastic”*.

**Vignette 2 - Traditional Wine Producer Identity**

The vignette presented above, highlights the family’s negative attitude towards wine tourism diversification as well as their reluctance to pursue tourism diversification activities. Elena’s discourse reveals her engagement in identity work to construct her identity as traditional wine producer and outline her unfavourable attitude towards diversification. She draws on a variety of discursive resources to construct her preferred self-identity, notably profession, family and age/generational differences (table 9).

First of all, in order to outline her negative attitude towards diversification, Elena draws on the profession/occupation-related discursive resource to construct her self-identity as traditional wine producer. It could be argued that she presents herself as a dedicated professional, who *‘made the choice’* to prioritise the winemaking activities at the winery and thus limit wine tourism diversification activities. Her statements *“this is a winery not an agritourism business”* and *“it (tourism) would disturb the other work”* clearly indicates her professional identity and the fact that the family wants to be recognised and acknowledged for being a traditional winery, producing high-quality wine and not for providing accommodation facilities to tourists.

Secondly, besides highlighting the fact that additional tourism activities (e.g. B&B) would interfere with the winery’s main activities, Elena notes that wine tourism diversification has a negative impact on her family/private life. In this instance, identity formation occurs through drawing on the family-related discursive resource. Due to the increased number of tourists to the area, which Elena derided as *‘mass tourism’*, the family decided to introduce a number of rules to be able to manage the wine tourism diversification activities as well as the numerous tourist encounters. One of these rules

consisted of closing the winery on Sundays. It could be argued that Sundays is generally a very touristic day and wineries are likely to benefit economically from receiving tourists on a Sunday. However Elena's discourse reveals a certain work-family conflict. She expressed strong frustration by criticising tourists for not respecting the family's private life when asking for winery visits on Sundays. Family time is prioritised, as she is unwilling to commit her entire self to being a host and receive tourists at the winery 7 days a week. In this instance it could be argued that wine tourism activities interfere with the family's private life and thus, tourism diversification has been reduced/limited to avoid work-family conflicts.

In addition, the family took the decision not to accept tourist busses and large tourist groups at the winery, which typifies a traditional wine producer identity.

*"We are **not equipped**; our facilities are **not equipped** to receive large groups. And I **don't want** to receive them. I **don't want** people who eat, get drunk and chat".*

The discourse uses words with negative connotations (in bold), notably '*not equipped*' and '*don't want*', highlighting the family's negative attitude towards large tourist groups. Elena positions herself apart from what she considers to be 'drunk tourists'. The potential economic benefits resulting from receiving large groups at the winery are not considered. It could be argued that Elena prioritises family life over economic gains from wine tourism diversification. Consequently, the family decided to receive maximum 10 people at a time to conduct winery visits and wine tastings in order to offer tourists a better experience but also to facilitate the task for the family.

Furthermore, age and generational differences as discursive resources are important in constructing Elena's self-identity. Her statement "*I have done this work for a number of years*" indicates her unwillingness to continue wine tourism diversification. Accordingly, the family decided to hire an outside employee to be in charge of these tourism diversification activities. Elena argues that this task has become '*too demanding*' and '*challenging*' for her.

She argues that she wants to be replaced by “*someone younger, who is passionate about it*”. Over the years, she has developed a certain reluctance to communicate, educate and share her passion with tourists. She prefers to concentrate on the administrative tasks and commercial aspects of the winery, rather than dealing with tourists on a day-to-day basis. It could be argued that the implied meaning of her statement “*I have done this work for a number of years now and I feel that I need to be replaced. Maybe someone younger, who is passionate about it*”, indicates the generational difference in attitudes with regards to wine tourism diversification. Elena considers herself to be part of the ‘older generation’ and believes the ‘new generation’ is more motivated and committed to engage with tourists. The importance of the generational differences when constructing self-identities will be further discussed in the subsequent section (see section 5.4.1.4. Types of Identity work).

Consequently, the family’s decisions with regards to wine tourism diversification, notably reducing the opening hours of the winery, introducing a wine tasting fee, refusing to receive large tourist groups, and employing outside personnel to receive tourists, indicate the family’s unfavourable attitude towards diversification. It could be argued that Elena draws on these different discursive resources, notably, profession, family and age/generational differences, to construct her self-identity as traditional wine producer. She is unable to personalise the social role of host and indicates a negative identity (Sveningsson and Alvesson 2003). The above vignette illustrates Elena’s continuous struggle between social identities. Her predominant professional and family identities are conflicting with the host and/or entrepreneurial identities and thus lead to an unfavourable attitude towards diversification.

In contrast to the first vignette, the second vignette illustrates how the participant engages in identity work to construct his identity as entrepreneurial wine producer and emphasise his willingness to pursue wine tourism diversification.

### 5.4.1.2. Entrepreneurial Wine Producer

#### Vignette – Case 20

Case 20 is a family winery currently owned and managed by the fifth and sixth generation, notably Maurizio and his three children, Paolo, Maria and Elia. The winery is located in the centre of *La Morra*, a small, renowned village, on top of a hill surrounded by vineyards, just outside of Barolo. Their annual wine production reaches up to 120000 bottles, which is considered a medium-sized winery for the Langhe area.

Paolo, the sixth generation of the family business, has recently graduated from university with a degree in economics and has the ambition to drive the family winery forward. He joined the family business in 2013 and his *“principal roles are the sales, marketing, and the management side of the winery”*. He notes: *“what I always wanted to do is manage a business, and the fact that we have a business at home was a big advantage”*. *“I was very fortunate to freely choose if I wanted to join the company or choose something else”*. Correspondingly, he *“chose straight away to join the company”*. For him, the choice *“was easy ... the choice was automatic”*. Working at the family business gives him a lot of satisfaction, as he is *“able to drive the company forward”*.

Furthermore, in response to the recent development of the wine tourism industry Paolo took the decision to open a wine shop, adjacent to the winery. *“The shop was the first thing I’ve introduced when I entered the company. I’ve informed myself how to open it and I’ve decided to open it”*. He states: *“I’m bringing new ideas because I really believe that nowadays we don’t just have to sell our wine, but we also have to provide a service to clients”*. He believes that this is what tourists *“are expecting now, as much from a wine tasting as from a winery visit”*. *“Offering an experience”* to tourists has become an important part of the family’s philosophy in order to attract an increasing number of tourists to the winery.

However Paolo also considers his approach to be a major change for the winery, due to the fact that *“this hasn’t been done by the previous generation”*. He believes that nowadays in order to succeed, *“tradition and innovation have to work hand in hand”*. With regards to the family tradition he notes: *“I’m proud to follow in the footsteps of my ancestors”*. Representing the sixth generation of the family business, he reveals the importance of the family tradition and history, and highlights the fact that every generation has contributed to the success of the family business. However, he also recognises that working at the family business means that *“there is also the pressure not to disappoint”*. While he respects the family tradition, he is convinced that in order to succeed *“you must follow technology”*.

Moreover, Paolo recognises that due to the recent generational change, the structure of the business has expanded, leading to various changes at the winery: *“The family was always made up of a couple that managed the business, so husband and wife,*

*up until my parents. They had 3 children, and now it's not only going to be one family, but 3 families ... 4 because my parents are still in the business".*

He further argues *"I have 2 sisters, so we are 3 from the new generation. So for them [the parents] it was important whoever decided to join the company that we would have our specific role in order to avoid any fights between me and my 2 sisters".*

There are however a number of incidents where family conflicts occurred in the wine sector in Langhe, leading to the closure or division of some well-known family wineries. He notes: *"in this area we have many examples of wineries where brothers and sisters had a fight and divided the company. And when a company is divided it loses more than half of its potential, much more".* Consequently, siblings are dividing the parent company due to internal conflicts. Especially disputes over land and property have been witnessed in this area. In order to avoid conflicts at the family winery, he highlights that *"everyone has his or her own space to be able to express him-/herself".*

Paolo manages the wine shop, Maria, the oldest sister is in charge of the agritourism business and *"manages the business for 1 year now"*, whereas the youngest sibling, Elia *"is still studying at the university and will join soon. She studies to become oenologist"*. Her future role will be to manage the oenological part of the winery. He further highlights: *"we are opening a small restaurant for the people staying at the agritourism business ... so this is an activity on the side, because my sister is a chef, and it is her passion"*.

Consequently, he argues that *"the business aims to grow"*. The family decided on a number of investment initiatives: *"we're currently investing, for example in the construction of the restaurant; we're looking for new vineyards, and we're looking for new countries to sell our wines. We're always looking to grow"*.

Although the family decided to invest in new activities, Paolo highlights the central role of the family in the management of the winery: *"The family continues to be the driving engine of the company. So continues to both embody the property, because the family is the property and also the key roles, like oenologist, sales director. The key roles will remain in the hands of the family"*.

### **Vignette 3 - Entrepreneurial Wine Producer Identity**

The vignette presented above reveals the family's entrepreneurial mind-set, their willingness to continue to diversify into wine tourism and expand the business. Expansion in this instance is achieved through wine tourism diversification and new market entry. Wine tourism diversification activities comprise the opening of a wine shop next to the winery, the development of an agritourism business on the outskirts as well as the opening of a restaurant adjacent to the agritourism business. Each family member thus occupies a

distinct position within the business. From both a family and business perspective, this situation seems rather advantageous. Through expanding/diversifying the business, the family is able to employ all of the family members at the winery, avoid internal conflicts and preserve the family tradition.

Paolo, representing the sixth generation of the family business engages in identity work when highlighting his future ambitions for the family winery. He draws on a number of discursive resources to construct his preferred self-identity, notably entrepreneur/manager, family and generational differences (table 9).

First of all, Paolo draws on the entrepreneurial/managerial discursive resource to construct his identity as an entrepreneurial wine producer and underline his willingness to pursue wine tourism diversification. He presents himself as a young, recently graduated manager/entrepreneur who is willing to innovate and drive the family winery forward. His statement: *“I’m bringing new ideas because I really believe that nowadays we don’t just have to sell our wine, but we also have to provide a service to clients”* indicates his entrepreneurial identity. He recognises the need to adapt to the changes and trends in the external environment. As entrepreneur, Paolo is inclined to pursue these opportunities. Once he joined the family business he created/developed his area of responsibility by opening a wine shop adjacent to the winery. He notes that the wine shop was:

*“the first thing I’ve introduced when I entered the company. I’ve informed myself how to open it and I’ve decided to open it”.*

Paolo actively positions himself as an entrepreneur in his discourse. What is interesting to note with regards to his discourse, is the use of the pronoun ‘I’ instead of ‘we’, notably, *‘I’ve introduced’*, *‘I entered’*, *‘I’ve informed’*, and *‘I’ve decided’*. Even though he joined the family business, it seems that straight away Paolo intended to develop his own ideas and have his distinct area of responsibility. However, when discussing the future projects of the family

business, he seems to draw on multiple discursive resources and adopts a combination of social identities, notably the entrepreneurial and family identities. He notes:

*“we’re currently investing, for example in the construction of the restaurant; we’re looking for new vineyards, and we’re looking for new countries to sell our wines. We’re always looking to grow”.*

The use of the pronoun ‘we’ in Paolo’s discourse indicates his attachment to the family business. While the previous discourse reveals Paolo’s personal/individual activities, this discourse highlights the family’s future investment plans. He positions himself as an active family member and depicts not only himself, but also his family as entrepreneurs.

Moreover, the discursive resources of age and generational differences are important in constructing Paolo’s self-identity. His statement: *“this hasn’t been done by the previous generation”*, indicates his innovative and entrepreneurial approach. Paolo positions himself as being a part of the new/younger generation, differentiating himself from the older generation (see section 5.4.1.4.). While it is recognised that the new generation respects the tradition, practices and processes employed by older generations, the new wine producing generation is likely to include innovative/entrepreneurial features in the management of the winery and thus, predominantly adopts an entrepreneurial/managerial identity.

Additionally, it could be argued that Paolo does not draw on the traditional agricultural/farmer-related discursive resource when constructing his preferred sense of self. First of all, Paolo is not really involved in the winemaking part of the business and thus the traditional agricultural identity might only be considered of minor importance. Secondly, amongst the new generation, the traditional farmer/agricultural identities are likely to decrease in importance. It could be argued that younger generations are increasingly reluctant to adopt the old, traditional, farmer identities, but prefer to position themselves as entrepreneurial business owners. Opposing and challenging the traditional



and cultural norms when constructing self-identities will be further discussed in the section on identity regulation (see section 5.4.2.).

Consequently, Paolo draws on these different discursive resources, notably, entrepreneur/manager, family and generational differences, to construct his preferred self-identity and emphasise his willingness to pursue diversification. He sees himself as an entrepreneur and a part of the new/younger generation, willing to change, innovate and follow market trends. The following section will compare and contrast the two vignettes in relation to the discursive resources deployed by both participants in constructing their preferred self-identities.

#### **5.4.1.3. Discursive Resources for Identity Work**

Table 9 outlines the various discursive resources deployed by the participants (Elena and Paolo) to construct a positive sense of self, exemplifying traditional and entrepreneurial wine producer identities. *Professionalism*, *family*, *entrepreneurship*, and *generational differences* were the most frequently occurring discursive resources wine producers drew on for their identity work.

Both participants use *family* and *generational difference* as a resource for identity work. First of all, the traditional wine producer in case 15 (Elena), as well as the entrepreneurial wine producer in case 20 (Paolo) draw on the family-related discursive resource when constructing a positive sense of self. While Elena deploys family as discursive identity resource to construct her desired self as traditional wine producer, Paolo draws on the family resource to constitute his entrepreneurial identity. Elena and Paolo both present themselves as dedicated family members, contributing to the success of the family winery. On the one hand, Elena draws on the family-related discursive resource to emphasise her commitment to the family, but also to highlight the continuous work-family conflicts encountered due to offering wine tourism activities. She actively positions herself as a family member, prioritising family life over wine tourism diversification. Paolo on the other hand, draws on family

as a resource for identity work to reveal his respect for the family tradition but also to point out the entrepreneurial mind-set of his family.

Secondly, both participants deploy generational difference as a discursive resource for identity work. Elena positions herself as part of the older, traditional generation whereas Paolo sees himself belonging to the younger, entrepreneurial generation. In this instance, the older generation implies a focus on tradition and agricultural profession, whereas the younger generation stands for innovation and entrepreneurship. In his discourse, Paolo is reluctant to adopt a traditional agricultural identity, whereas Elena refuses to position herself as an innovative and entrepreneurial wine producer. She believes wine tourism diversification to be a strategy adopted by the younger generation, not fitting with the values and norms of the older generation.

	Traditional wine producer Identities		Entrepreneurial wine producer Identities	
Discursive resources	Discourse	Identity work	Discourse	Identity work
<b>Family</b>	<p><i>"From Monday to Saturday. Sundays we are closed; even if many ask to do visits on Sundays. I don't have employees working on Sundays. Otherwise we <b>wouldn't have a life anymore</b> ... but people don't seem to realise that. People that are asking for visits on a Sunday, think we are here to entertain. I don't know. But I also <b>have a private life</b>"</i></p>	<p>-Self as dedicated family member -Unwilling to commit her entire self to being a host -Conflicting social identities: host and family identities</p>	<p><i>"On one side I'm <b>proud</b> to be able to drive the company forward and <b>follow in the footsteps of my ancestors</b>. So I'm feeling <b>proud</b>. On the other side there is also the pressure not to disappoint"</i></p> <p><i>"The business <b>aims to grow</b>, we're currently investing, for example the construction of the restaurant, we're looking for new vineyards, we're looking for new countries to sell our wines. We're <b>always looking to grow</b>"</i></p>	<p>-Self as dedicated family members, following and respecting the family tradition</p> <p>-Self as dedicated family member, highlighting the family's entrepreneurial mind-set</p>

<b>Profession</b>	<i>"When you come here we are offering a <b>professional service</b>, you are listening to what I'm explaining and saying and I expect during a wine tasting that when I'm explaining the people are quiet"</i>	-Self as dedicated professional/ traditional wine producer -Conflicting social identities: host and wine producer identities	No data
<b>Entrepreneur</b>	No data		<p><i>"I'm bringing <b>new ideas</b>, because I really believe that nowadays we don't just have to sell our wine, but we also have to <b>provide a service</b> to clients. So we have to provide and <b>offer something more</b> than what they pay for"</i></p> <p><i>"The shop was the first thing I've introduced when I entered the company. I've informed myself how to open it and I've decided to open it"</i></p>
<b>Generational differences</b>	<i>"I have done this work for a number of years now and I feel that I need to be replaced. Maybe someone younger, who is <b>passionate</b> about it. For me it's becoming <b>too demanding</b>. We have a young employee who is very enthusiastic"</i>	-Self as part of the older generation -Conflicting social identities: host and traditional / professional identity	<p><i>"And doing this, offering an experience, publishing and letting the world know, this <b>hasn't been done by the previous generation</b>. The internet didn't exist; there was no YouTube. Because in any way you must follow technology"</i></p>

**Table 9 - Contrasting Table - Identity Work**

Moreover, in line with her traditional winemaking identity, Elena predominantly draws on the professional/agricultural resource, whereas Paolo deploys entrepreneurship as discursive identity resource to constitute their desired selves. Elena positions herself as a dedicated professional/wine producer, who wants to be recognised as such. Through strongly identifying with her profession she refuses to adopt a host identity. It could be argued that adopting a host identity is perceived as inferior to adopting a professional/agricultural identity. In her discourse she fails to recognise wine tourism as a profession in itself. Paolo in contrast draws on entrepreneurship as resource for identity work and actively positions himself as an entrepreneur by engaging in wine tourism diversification. In his discourse, the traditional agricultural identity is of minor importance, as he believes in driving the company forward through innovation and entrepreneurship. While he recognises the importance of following the tradition, particularly respecting the winemaking traditions, he does not identify with the traditional winemaking profession, but thinks of himself as a business manager.

Consequently, this section of the findings chapter demonstrates that both participants actively engaged in identity work to construct a positive sense of self and highlight their feelings and attitudes towards wine tourism diversification. Through the use of contrasting vignettes, two identities emerged, notably that of the traditional wine producer and that of the entrepreneurial wine producer.

After having discussed the contrasting identities, the following section will outline how participants engage in various forms of identity work to position themselves on the identity continuum, ranging from traditional/conventional to entrepreneurial wine producer identities. As the review of the literature established, individuals engage in various forms/types of identity work to construct a positive and preferred sense of self. The analysis of wine producers' accounts reveals the use of various such types of identity work. It is argued that participants engage in discourses of coherence, commitment, differentiation/distinctiveness, and of their desired/aspired selves to constitute their self-identities.

#### 5.4.1.4. Types of Identity Work

Different types of identity work have become apparent in the data, notably differentiating, aspirational, narrative and personalising identity work. This section of the findings chapter examines how wine producers engage in these different types of identity work through talk about coherence, commitment, differentiation/distinctiveness, and wine producers' desired self. It is argued that when engaging in these discourses, participants position themselves on the identity continuum and actively construct traditional or entrepreneurial wine producer identities (table 10).

Indicators of Identity work	Traditional wine producer	Entrepreneurial wine producer
<b>Coherence</b>	<p><i>"Our work is to do wine not hospitality"</i> (Case 10)</p> <p><i>"Our primary activity, and it is important never to forget that is winemaking"</i> (Case 24)</p> <p><i>"This is not a public institution but it is a <b>business</b>"</i> (Case 18)</p> <p><i>"But nowadays here, people want to have everything, a winery, a restaurant, rent some rooms, <b>you shouldn't exaggerate</b>. I'm doing <b>my work</b>; you need some common sense. Better doing a bit less and <b>being satisfied</b>"</i> (Case 7)</p>	<p><i>"For me it is <b>always a pleasure</b> to receive new clients. It is <b>always nice</b>. Selling wines all over the world, we are a small winery and then seeing the clients at the winery is <b>always a big pleasure</b>"</i> (Case 13)</p> <p><i>"I'm <b>very inclined</b> to receive tourists here; show them around and let them try my wines. After, if they like them, they can buy the wines. I'm always trying to attract people to the winery... There is definitely <b>more satisfaction</b>. If someone comes to the winery to have a tour and try the wines that is <b>more satisfying</b> that someone calling to receive 2 boxes of wine. It is <b>more satisfying</b>, there is a relationship: it is nice: it is <b>more rewarding</b>; also for the self-esteem. If someone comes to the winery it is always <b>much nicer</b>"</i> (case 17)</p>
<b>Commitment</b>	<p><i>"Having a family business means <b>you are what you do</b>, you are what you produce and it's a lot of work"</i> (Case 7)</p> <p><i>"We've grown up in these surroundings and <b>we are in love</b> with what we are doing, it's not even work; <b>it's a passion</b> that grows every day"</i> (Case 9)</p> <p><i>"We don't sleep at night because we're concerned about the harvest, is it going to be compromised by the rain, the season,</i></p>	<p><i>"The moment we are here we are open. If needed I will also open at night. <b>I'm always open</b>. If you come Saturday lunch time, or Sunday evening at 8pm we are always open"</i> (Case 17)</p> <p><i>"But we try to <b>always be available</b> ... as a joke we thought of an idea to open the winery at night ... It is essential to be available at any time"</i> (Case 6)</p>

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*hail storm. You are doing everything possible so that you have the highest quality wine, because it is your **ambition**, your **passion**" (Case 27)*

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## Differentiation

Wine producer vs. Tourists

*"I **don't want** to. I'm **not interested** in these kinds of tourists, who walk or drive passed my door. They must be interested and must have chosen me... because of our wines; maybe they tried the wines before. I **don't do** generic tourism, I do wine tourism" (Case 18)*

*"And I **don't want** to receive them. I **don't want** people who eat, get drunk and chat" (Case 15)*

*"I am here waiting for them. I **don't understand** why these things happen. I tell them, if they aren't able to make it, just give me a quick phone call or write me an email. At least I don't wait here" (Case 15)*

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Wine producer vs. Locals

No data

*"We were the **first** to open an agritourism business in 1993. My mother was the **first** to open this in Barbaresco ... The people around here thought she was crazy, because no one would come here to visit this area. But she said they were crazy. Of course people would come to this area" (Case 9)*

*"We were **pioneers** in relation to wine tourism and winery visits ... at that time it wasn't seen as a good position for your winery, if you were open and sold your wines to the public and you received tourists. Everyone wanted to sell their wines only to importers and only to professionals not for tourists. We however were **always open** and therefore our colleagues/ other wineries would think of us as having a lower position, because we received tourists" (Case 8)*

*"Because so many wineries concentrate on the wines. So we try to **offer something different** that distinguishes ourselves from the others. (Case 2)*

*"People are coming from all the different corners of the world, travel hundreds or*

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thousands of kilometres, by plane or car, and then decide, amongst all these producers to come and visit **us** ... So the fact that amongst all the producers in the area they come and want to try **our wines** ... this is the way to make **our products** known; so that people choose of this area, [name of the winery] rather than another producer (Case 14).

<p>Older generation vs. Younger generation</p>	<p>"I have done this work for a number of years now and I feel that I need to be replaced. Maybe <b>someone younger</b>, who is passionate about it. For me it's becoming too demanding" (Case 15)</p>	<p>"So it was very difficult going to a winery, let's say for <b>my parent's generation</b> ... they didn't like it. They were even annoyed. But now ... the arrival of tourists to the winery, in my opinion, works best, and that you need the most" (Case 17)</p> <p>"We work to live and it's not that we live to work" (Case 20)</p> <p>"And doing this, offering an experience, publishing and letting the world know, this hasn't be done by the <b>previous generation</b>" (Case 20)</p>
<p>Desired Self</p>	<p>"You are <b>doing everything possible</b> so that you have the <b>highest quality wine</b>, because it is your ambition, your passion" (Case 27)</p> <p>"Having a <b>constant challenge</b> every day, which is to exploit ... the possibilities of transmitting one's own character and one's own way of being through the products, through the wine; so to be able to produce a wine that is the expression of the person, of the family, <b>something that is unique</b>" (Case 8)</p>	<p>"I'm <b>always trying</b> to bring people to the winery. I'm a very social person. I use Instagram a lot and I've seen that it helps me ... I see that there is a certain interest. I have a small winery, so if I don't use these methods of communication no one will know my winery. I also do everything by myself" (Case 17)</p> <p>"We get up at 6am to go to work in the vineyards. At noon we are coming in for our lunch and the doorbell is ringing, tourists asking for a wine tasting. Yes we accept them. Let's go. So yes we are <b>always trying</b> to do the visits" (Case 9)</p> <p>"The mission is to push in new countries and probably to position us into new markets and we have the ideas to upgrade our brand" (Case 19)</p>

Table 10 - Means for Identity Construction

## Coherence

When discussing wine tourism diversification, wine producers engage in identity work in order to construct a coherent sense of self. In this instance, coherence is delineated as “a sense of continuity and recognisability” (Alvesson and Willmott 2002, p.625). When positioning themselves on the continuum as more traditional/conventional wine producers, they highlight their priority for the winemaking profession. Entrepreneurial wine producers by contrast emphasise their willingness to invest in wine tourism diversification activities.

When constructing traditional agricultural identities, participants note in their discourses that wine tourism diversification interferes with their principal work activities. They refuse to adopt a host identity or to position themselves as hosts, even though they have developed various wine tourism activities in the past. Traditional wine producers construct a coherent self-identity, when producing the following discourses:

*“Our work is to do wine not hospitality” (Case 10)*

*“Our primary activity, and it is important never to forget that is winemaking”  
(Case 24)*

*“This is not a public institution but it is a business” (Case 18)*

The discourses topicalise words associated with being a traditional wine producer, notably ‘*work*’, ‘*primary activity*’ and ‘*business*’, to create a sense of continuity and coherence. As established earlier, topicalisation is concerned with the meaning/topic of a discourse (Huckin 1997, p.83). Through engaging in talk about their profession, participants actively position themselves as traditional wine producers and want to be recognised as such. In this instance, it can be argued that traditional wine producers strive to secure a sense of continuity and refuse “to comply with a vocabulary indicating another orientation and attitude to work” (Alvesson and Willmott 2002, p.633). They strongly identify with their principal winemaking activity, whereas wine tourism diversification activities are not regarded as a ‘profession’ and are likely to threaten wine producers’ sense of continuity.



The wine producer in case 18 for example actively positions his winery apart from what he considers to be a *'public institution'*. Although he has diversified into tourism, this does not result in another orientation and attitude to work. The wine producer's discourse reveals his reluctance to change and/or adopt a different/non-agricultural identity. He is unwilling to commit his entire self to being a host. Similarly, Gabriele, the wine producer in case 7, engages in identity work to construct a coherent self-identity when referring to wine tourism diversification:

*"But nowadays here, people want to have everything, a winery, a restaurant, rent some rooms; you shouldn't exaggerate. I'm doing my work; you need some common sense. Better doing a bit less and being satisfied"* (Case 7)

With his statement *'I'm doing my work'* Gabriele positions himself as a traditional wine producer and emphasises his unwillingness to pursue wine tourism diversification. It could be argued that the continuous development of the tourism industry threatens his desired sense of continuity. Entrepreneurial wine producers, who are investing in and constructing agritourism businesses and restaurants are depicted in his discourse as *'exaggerating'*, while he believes to have *'common sense'*. Gabriele is under the impression that predominantly focusing on the winemaking activity will ultimately result in greater fulfillment and gratification.

In contrast, the two wine producers in case 13 and 17 (Fabio and Pietro) are engaging in identity work in order to construct a coherent entrepreneurial identity. They highlight their favourable attitude and willingness to pursue wine tourism diversification and want to be recognised as entrepreneurs, rather than traditional wine producers. As illustrated in table 10, the discourses topicalise words associated with satisfaction, notably *'pleasure'*, *'nice'*, *'inclined'*, *'satisfying'*, and *'rewarding'*, to create a sense of coherence.

Pietro's (case 17) statement *"I'm always trying to attract people to the winery... there is definitely more satisfaction"*, stands in stark contrast to Gabriele's assertion *"better doing a bit less and being satisfied"*. While Pietro

believes satisfaction is related to wine tourism diversification, Gabriele emphasises that focusing on and prioritising winemaking activities will lead to increased satisfaction. He further notes: “*I only believe in the producers who work in the vineyard*”. In this statement, he strongly dis-identifies with entrepreneurial wine producers. It could be argued that for Gabriele, wine producers who have decided to diversify into wine tourism are not perceived as ‘traditional or ‘real’ wine producers. This traditional, agrarian mentality and its influence on wine tourism diversification decisions will be further discussed in the following section on identity regulation (see section 5.4.2.).

While traditional wine producers engage in identity work to construct their coherent agricultural/professional identities, entrepreneurial wine producers construct their preferred self-identities as entrepreneurs/innovators, having developed and invested in wine tourism activities. Besides wine producers’ engagement in identity work to construct a coherent sense of self, participants also deploy commitment as a resource for identity work in order to position themselves either as traditional or entrepreneurial wine producers. The following section examines how agricultural and entrepreneurial identities are constructed through discourses about commitment.

## **Commitment**

Participants’ discourses about wine tourism diversification display their commitment to being a traditional wine producer. They focus on their agricultural role (e.g. ‘*you are what you produce*’), the place attachment (e.g. ‘*we’ve grown up in these surroundings*’), as well as their passion for the job (e.g. ‘*we are in love with what we are doing*’). The analysis reveals that certain wine producers narrate stories about the family, the place, and their passion for the winemaking profession to actively position themselves as traditional wine producers. In this instance it could be argued that traditional wine producers engage in narrative identity work to highlight their commitment to the winemaking profession and construct a positive sense of self.

Wine producers have generally grown up in this rural environment and have been exposed to winemaking from a young age. The commitment to the winemaking profession is also revealed in participants' discourses, when referring to their work not as a job but as a passion. Wine producers adopt a certain lifestyle, where work and passion for wine play a central role. Parents transfer their passion and lifestyle to their children already at a young age. Children accompany and help their parents in the vineyards and wine cellars.

Correspondingly, Valeria (case 27) emphasises her commitment to the winemaking profession and actively positions herself as a traditional wine producer, as the following discourse demonstrates:

*"We don't sleep at night because we're concerned about the harvest, is it going to be compromised by the rain, the season, hail storm. You are doing everything possible so that you have the highest quality wine, because it is your ambition, your passion" (Case 27)*

It is participants' strong identification with the winemaking profession that informs their 'emotionally charged' discourses (Alvesson and Willmott 2002, p.634). However, participants do not only construct traditional, agricultural identities, but also entrepreneurial identities when engaging in discourses about commitment. The following discourse about commitment positions the wine producer as dedicated entrepreneurial business owner.

*"The moment we are here we are open. If needed I will also open at night. I'm always open. If you come Saturday lunch time, or Sunday evening at 8pm we are always open" (Case 17)*

Pietro's discourse (case 17) reveals his positive attitude and commitment to wine tourism diversification. Due to the fact that his home is adjacent to the family winery, he argues that 99% of the time he is available to accommodate tourists at his winery. The wine producer in case 6 engages in a similar discourse when joking about the fact of opening the winery at night, to show her commitment to wine tourism diversification (see table 10).

Consequently, it could be argued that participants use commitment as a means for constructing traditional agricultural identities as well as innovative/entrepreneurial identities. Traditional wine producers highlight their commitment to their profession, whereas entrepreneurial wine producers emphasise their commitment to wine tourism diversification activities. The following section will examine distinctiveness/differentiation, as a means for constructing wine producers' self-identities.

### **Differentiation/ Distinctiveness**

As the earlier review of the literature established, differentiating identity work enables individuals to define *who they are* by engaging in discourses of similarities and differences. Through differentiating identity work, participants emphasise the social comparison of self and other and construct traditional or entrepreneurial wine producer identities. Various forms of differentiating identity work have emerged from the data. While certain wine producers differentiate themselves from wine tourists and local residents, others distance themselves from the younger, respectively older generation. These three forms of differentiating identity work will be discussed in the following section.

#### Wine producers vs. tourists

As established earlier, differentiating identity work has been depicted as individuals' attempts to determine, legitimate or oppose dominant power relationships (Ybema et al. 2009). First of all, participants construct their preferred identities when differentiating themselves and their families from tourists. Traditional wine producers position themselves apart from tourists, as the following discourse demonstrates:

*“for **us** it's not possible. 10 people are already challenging and demanding. So **they** need to be very discrete and attentive and follow **me** ... For sure, one needs to go to the toilet, the other one is wondering around, the other one goes off to take a picture, so **I** can't always tell **them** 'no'. So when there*

*are larger groups you need more time. So two and a half hours you need for sure. So **they** have to respect the time that **we** dedicate to **them**. Otherwise I am unable to offer **them** a professional service” (Case 15)*

The discourse outlines the social comparison of self and other. The traditional wine producer engages in identity work when differentiating herself and her family from tourists. There is a clear distinction between ‘we’ and ‘they’. Participants use the pronouns ‘we’ to present themselves and their social groups as *good* and *superior*, whereas the pronoun ‘they’ is used to refer to ‘the other’ as *bad* or *inferior* (Oktar 2001; Van Dijk 1998). In this discourse, the use of the pronouns ‘we’, ‘us’ and ‘me’ refers to the wine producer and her family, whereas the pronoun ‘they’ and ‘them’ relates to tourists. The discourse indicates a certain level of superiority over tourists, where tourists are perceived as ‘them’, rather than ‘us’. Oktar (2001) referred to this discourse as positive self-presentation and negative other-presentation.

Further statements expressed by participants (table 10), such as “*I’m not interested in these kinds of tourists*”, “*I don’t want to receive them*”, and “*I am here waiting for them*”, indicates a certain level of superiority over tourists as well as wine producers’ reluctance to engage in wine tourism activities. Similarly, the statement “*we are offering a professional service*” (case 15) relates to the family as committed professionals, differentiating themselves from tourists, who are referred to as inferior in the discourse: “*I don’t want people who eat, get drunk and chat*”; emphasising wine producers’ engagement in self-other talk.

Furthermore, Thornborrow and Brown (2009) use the term of ‘elitism’ to refer to participants’ presumptions of superiority. The authors argue that participants construct their identities as superior, which “often entails claims to special powers, prestige and privileges” (p.364). Through engaging in differentiating identity work, discourses reveal the power relationship between wine producing families and the tourists. Tourists are perceived as ‘targets’ whereas the families are depicted as ‘agents’. As highlighted in the previous discourse of case 15, the wine producer expects that tourists are ‘discrete’,

*'attentive'*, and *'follow'* the wine producer during winery visits. Similarly, the statement: *'I can't always tell them 'no''*, indicates the power relationship between the family and tourists and implies that the family has the power to *'tell them no'*.

From the moment tourists arrive at the winery they are being closely watched and are required to *'respect'* the time the family dedicates to them and the rules introduced by the family. It could be argued that family wineries are increasingly introducing a variety of rules (e.g. wine tasting fee, limiting the number of people per visit, reducing opening hours) to better manage the guest-host relationship and ensure the appropriate control and surveillance of tourists. Wine-producing families are depicted as powerful agents, guiding tourists through the winery and visiting only specific parts of the winery. Thus, families decide on what can and cannot be seen and experienced by tourists. Similarly, during wine tastings, a specific selection of wines are offered, depending on the country of origin of tourists. Over the years, due to the close observation and examination of tourists, wine-producing families are able to understand and increase their knowledge on different wine consumers' tastes and preferences, depending on their country of origin. Besides differentiating themselves from tourists, wine producers have also engaged in identity work to distance themselves from local residents and other wine producers, as will be discussed in the following section.

#### Wine producers vs. local (wine-producing) community

While certain participants construct their traditional, agricultural identities when differentiating themselves and their families from tourists, others construct entrepreneurial identities and differentiate themselves from the local community. The following vignette illustrates the wine producer's engagement in identity work to differentiate himself from the local community.

## Vignette – Case 8

The winery in case 8 is a medium-sized family winery, currently owned and managed by Franco and his brother Bruno, representing the 5<sup>th</sup> generation of the family business. The winery is located just outside the famous village of Neive with an annual wine production reaching 120000 bottles.

While the family has been selling grapes and making wine for five generations, it was Franco and Bruno's grandfather who built the current winery in 1964. Bruno states that his grandfather *"decided straight away to create a space for hospitality, for receiving clients/tourists"*. This space *"was inaugurated in 1967"*. At that time, *"it was more local tourism from Liguria, Piedmont and Lombardy"* and people used to *"come and buy the wines directly at the winery"*. Bruno and Franco grew up in these surroundings and note that *"for us it was normal to receive tourists"*. The family was always eager and ready to accommodate and receive tourists at their winery. Having engaged early on in wine tourism diversification Bruno describes his family as *"pioneers in relation to wine tourism and winery visits"*.

Furthermore he states: *"in the past we didn't really have a fixed time schedule"*, meaning that the family was open seven days a week and willing to accept tourists at any time during the day. *"Usually people visited on the weekends, so Saturday or Sunday morning"*. Recently however, the increasing number of tourists, as well as the increased amount of work, has resulted in work-family conflicts, due to the fact that family members were unable to dedicate enough time to their private life. Consequently, the family *"decided to close on Sundays for personal reasons"*. *"Now we are open from Monday to Saturday and on Sundays only on appointments and only for 3 months of the year"*, notably September, October and November, which is considered the region's peak season.

So in this instance Bruno notes that *"our path is the other way round"*, meaning that while his winery was open in the past and now reduced/limited the winery's opening hours, other local wineries were closed in the past and recently decided to open the winery to tourists. Bruno is stating that *"until a few years ago, all the wineries were closed"*. *"At that time it wasn't perceived as a good idea to open the winery"*. He further argues that in the past, *"the famous wineries were always closed, so all the other wineries wanted to do the same"*. *"Everyone wanted to sell their wines only to importers and only to professionals not to tourists"*, due to the fact that *"it wasn't seen as a good positioning for your winery, if you were open and sold your wines to the public and you received tourists"*. *"We however were always open and therefore our colleagues/ other wineries would think of us as having a lower position, because we received tourists"*.

While other wine producers kept their wineries closed to the public to keep their status of 'high-quality wine producer', Bruno reveals that his family actively engaged in wine tourism diversification and developed a number of activities. *"Here in the winery we created a space to sell our wines. So we have a wine tasting room for*

*groups, and a more intimate tasting room that we use for groups up to 10 people and that space we also use as shop”.*

However, in relation to wine tourism diversification, he witnessed that nowadays *“wineries are continuously developing; they offer winery visits and lunches, or visits with a show, or events ... so in only a short period of time, the wineries started to move forward”*. While local wineries started to engage in wine tourism diversification, Bruno and Franco’s current priority and focus is *“on the agricultural part, so on the vineyards”*, as the two brothers aim *“to increase even more the quality of the wine”*, arguing that they *“don’t want to open a restaurant at the winery”*.

**Vignette 4 - Differentiating Identity Work**

The vignette presented above highlights Bruno’s active engagement in identity work to differentiate himself and his family from the local wine-producing community. Bruno describes himself and his family as *‘pioneers’* in relation to wine tourism diversification, as they were one of the first wineries in Langhe to diversify and open their winery to tourists. He engages in identity work to differentiate himself from the local wine producers but also to position himself and his family as *‘entrepreneurs’*, recognising opportunities and investing in these opportunities. In this instance, it could be argued that Bruno not only engages in differentiating identity work but also in personalising identity work to construct a distinct and unique sense of self. These two types of identity work are recognised as important means for constructing entrepreneurial identities, as will be further discussed in the subsequent chapter (chapter VI – discussion chapter).

Bruno depicts the wine producing community in Langhe as traditional and narrow-minded, not recognising the benefits of diversifying into wine tourism. Conventionally, wine producers sold their wines to importers, restaurants and wine professionals. Wine tourists were never considered a principal target market. Diversifying into tourism means that wine producers have to open their winery to visitors and *“there are those who don’t want to open and don’t want to do wine tastings as they think it is their secret”* (Case 9). Similarly Bruno notes that in the past, wine tourism diversification activities, such as offering wine tastings and cellar-door sales were perceived as inferior and local wine producers preferred to keep their winemaking process secret.



Furthermore, it can be argued that Bruno engages in differentiating identity work to oppose and challenge the traditional, agrarian mentality (see section 5.4.2. on identity regulation). As a consequence of their decision to engage in wine tourism diversification, the family was perceived amongst the local wine-producing community as producing low-quality wines. It could be argued that wine producers engaging in wine tourism diversification activities (e.g. wine tastings, winery tours, cellar-door sales, B&B) lose their 'good/respectable' wine producer status amongst the wine-producing community. In this instance, winemaking is perceived as superior, whereas tourism activities are seen as inferior, diminishing the hospitality and entrepreneurial skills required to engage in wine tourism diversification. The importance of place and the local wine-producing community as an identity regulating force will be examined in depth in the following section on identity regulation (see section 5.4.2.).

However it could be argued that Bruno engages in differentiating identity work to construct conflicting/opposing identities. On the one hand, he engages in differentiating identity work to construct an entrepreneurial identity, meaning that he differentiates himself from local wine producers, highlighting the family's active engagement in wine tourism diversification. On the other hand, when discussing the current situation of wine tourism development and diversification Bruno seems to distance himself from local wine-producers who have recently engaged in wine tourism diversification, highlighting his priority for the winemaking profession. Therefore, differentiating identity work is used as a means to construct a more traditional, agricultural identity.

Moreover, similar to the vignette illustrated above, the wine producer in case 2 notes: "*we try to offer something different that distinguishes ourselves from the others*". In her discourse, she differentiates herself and her family from other local wine producers. There is a clear framing of 'the other'. It could be argued that the wine producer's discourse displays a certain degree of superiority over other local wineries, due to the fact that the family developed distinct activities and services to offer to visitors. Besides winery visits and wine tastings, the family decided to offer local sightseeing tours, visiting local

churches and monuments. The wine producer recognised this approach to be essential in order to distinguish themselves from other wineries. Correspondingly, Fabio (case 13) argues that “*some people are not made to receive tourists. You do require the right attitude to receive tourists*”. With this statement, he adopts an entrepreneurial identity and distances himself from other local wine producers, who he depicts as having the ‘wrong’ attitude to engage into wine tourism diversification.

#### Older generation vs. younger generation

Another differentiating type of identity work evident in the data relates to the distinction between the older generation and the younger generation. Wine producers engage in differentiating identity work to highlight the generational differences. Wine producers construct their entrepreneurial identities through differentiating themselves from older generations, as the following discourse demonstrates:

*“So it was very difficult going to a winery, let’s say for my parent’s generation ... they didn’t like it. They were even annoyed. But now ... the arrival of tourists to the winery, in my opinion, works best, and that you need the most” (Case 17)*

In his discourse, Pietro (case 17) differentiates himself from his parent’s generation and challenges the traditional, cultural norms set by the older generation. The discourse uses words with negative connotations, notably, ‘*didn’t like*’ and ‘*annoyed*’ to refer to the older generation’s attitudes towards wine tourism in general and wine tourism diversification in particular. Once Pietro took over the family winery from his father, he invested in the reconstruction of the winery, built a wine tasting room and started to receive tourists at the winery.

He further argues: “*Even if they say they are open, this mentality still persists; a lot of jealousy. I see it happen. For this mentality to disappear you need a lot of time*”. The traditional, agrarian mentality still prevails today amongst the older generation and is unlikely to disappear. Wine tourism in Langhe is a

relatively recent phenomenon, which has developed over the past 10 to 15 years and especially the older generation of wine producers displays a strong place attachment and place identity, and tends to not recognise the benefits of diversifying into wine tourism. He depicts the older generation as conservative, jealous and inward looking, unwilling to accept wine tourists at their winery.

Similarly, Paolo's statement (Case 20; see table 10): "*We work to live and it's not that we live to work*", indicates a dis-identification with the older generation. In this instance, Paolo actively engages in identity work, to differentiate himself and his family from the older generation. He positions himself apart from what he perceives as the traditional agrarian mentality; that is "*you live to work*". In this instance, younger generations are more likely to identify themselves as entrepreneurs, whereas older generations embody the tradition. It could be argued that younger generations are increasingly reluctant to adopt the old, traditional, agricultural identities. They engage in identity work to oppose and challenge the cultural norms and agricultural traditions and position themselves as entrepreneurial business owners.

### **Desired Self**

When discussing wine tourism diversification, wine producers engage in aspirational identity work. Wine producers can be characterised as 'aspirants'. They engage in aspirational identity work to position themselves along the wine producer identity continuum. They construct "idealised identities to which they aspire" (Thornborrow and Brown 2009, p.355). On the one hand, wine producers constitute their desired entrepreneurial identity and aspire to be a successful entrepreneur. On the other hand, wine producers aspire to be a recognisable, high-quality wine producer, through engaging in aspirational identity work.

*"I'm always trying to bring people to the winery. I'm a very social person. I use Instagram a lot and I've seen that it helps me ... I see that there is a certain interest. I have a small winery, so if I don't use these methods of*

*communication no one will know my winery. I also do everything by myself"*  
(Case 17)

Pietro (case 17) engages in aspirational identity work to construct his desired entrepreneurial identity. The discourse reveals his willingness to diversify into tourism, as he aims to attract an increased number of tourists. He recognised that in order to attract tourists to the winery he needs to step away from the tradition and start using technology (e.g. social media). Similarly, Marco, the wine producer in case 9, aspires to be a successful entrepreneur, while simultaneously concentrating on being a wine producer.

*"We get up at 6am to go to work in the vineyards. At noon we are coming in for our lunch and the doorbell is ringing, tourists asking for a wine tasting. Yes we accept them. Let's go. So yes we are always trying to do the visits"* (Case 9)

The discourse highlights Marco's continuous struggle to exercise his work as a wine producer and simultaneously engage in entrepreneurial activities, by accepting wine tourists at his winery. In this instance, he engages in aspirational identity work to construct his entrepreneurial identity.

Besides striving to construct desired entrepreneurial identities, wine producers also engage in aspirational identity work to construct their desired traditional, agricultural identities, thus prioritising their core winemaking activity over wine tourism diversification.

*"You are doing everything possible so that you have the highest quality wine, because it is your ambition, your passion"* (Case 27)

Valeria (case 27) aspires to be a traditional, high-quality wine producer. She aims to produce "*the highest quality wine*" and continuously strives to live up to her expectations. She does not consider wine tourism diversification as a

viable option and concentrates on her core winemaking activity while pursuing her preferred identity. She desires to be recognised as a 'real' wine producer.

Wine producers are continuously pursuing a "highly desirable yet elusive" identity (Thornborrow and Brown 2009, p.355), such as producing the highest quality wine. Aspiring to be a traditional, 'real' wine producer or an innovative/entrepreneurial wine producer, influences their decision-making process in relation to wine tourism diversification. It could be argued that engaging in aspirational identity work to construct their desired/aspired sense of self is inextricably linked to the process of differentiation. In this instance, wine producers aspire to 'achieve' a desirable identity, while simultaneously distancing themselves from 'the other', emphasising their superiority over 'the other'.

Consequently, this section of the findings chapter has examined how participants can be seen to have engaged in various types of identity work to construct a positive sense of self and position themselves on the identity continuum, ranging from 'traditional' to 'entrepreneurial' wine producer identities. These different types of identity work will be discussed in greater depth in chapter VI (discussion chapter). However, what has emerged from the analysis of the data is that wine producers are not only engaging in agential identity work when constructing a positive and preferred sense of self, but various social/cultural forces are likely to influence and regulate wine producers' identities. The following section of the findings chapter will examine the social/cultural forces shaping wine producers' identities.

#### **5.4.2. Identity Regulation**

While the previous section revealed wine producers' active engagement in identity work to construct their preferred self-identities, this section examines how social and cultural forces and practices regulate wine producers' identities and influence wine tourism diversification decisions. Wine producers' identity formation is depicted as a complex interplay between identity work

and identity regulation, explaining wine producers' un/willingness to diversify into wine tourism.

#### 5.4.2.1. Identity Regulating Forces

While wine producers' actively engage in identity work, by drawing on various discursive resources to construct a positive sense of self, they are simultaneously regulated and influenced by social and cultural norms. Different identity regulating forces emerged from the data, notably place attachment, talk about the family, social norms set by the local wine-producing community as well as the perception of the winemaking profession (table 11). Certain wine producers adhere to these social norms and tend to predominantly construct traditional wine producer identities, whereas other wine producers oppose these norms and traditions and primarily construct entrepreneurial identities.

The following vignette highlights the complex interplay between agential identity work and social/cultural forces regulating wine producers' identity construction.

##### Vignette – Case 9

Case 9 is a small family winery, currently owned and managed by two brothers, Marco and Alessandro, representing the fourth generation of the family business. The parents are still active in the winery and assist the two brothers in the day-to-day operations of the winery.

The winery is located just outside the famous village of Barbaresco and the family produces yearly about 20000 bottles. Due to this small wine production, the family does not employ outside personnel to work at the winery. The four family members, currently employed at the winery are able to manage the various activities.

The parents took the decision to diversify into tourism and invested in the development of an agritourism business in 1993. Marco notes that they were the first winery in the area to take advantage of the tourism development and diversified into tourism. *“In relation to the wine tourism in this area we were the first to open an agritourism business in 1993. My mother was the first to open this in Barbaresco. At that time there were no other hotels or B&B. The people around here thought she was crazy, because no one would come here to visit this area. But she said they were crazy. Of course people would come to this area. There is everything here,*

*good wine, good food, and beautiful landscapes. Why should we not open something for tourists?"*

Recognising the benefits of wine tourism diversification, 7 years later the family decided to continue to diversify into wine tourism. *"From 2000 up until now we restructured another part of the farmhouse to build apartments. So now we have 3 rooms and 4 apartments. It is still very small and always a family business"*. Initially the parents were in charge of the diversification activities. *"My mother did the wine tastings, as I was still studying. She did that whereas my father is more involved in the agricultural part, but he also helped a lot with the wine tastings"*. Presently, Marco is in charge of the winery visits and wine tastings, whereas Alessandro concentrates on the oenological part of the winery.

Marco however argues that not every wine producer in the area adopts this attitude towards wine tourism and states: *"There are also those who don't want to open and don't want to do wine tastings as they think it is their secret. But there are no secrets about the wine making process. Maybe that's the mentality that is a bit closed". "I speak with colleagues and friends who are producers and they say they don't have time for wine tastings because they need to work in the vineyards or at the winery. They don't dedicate a lot of time or don't think of this"*.

Although the family decided to diversify into wine tourism in the past, Marco notes that for the future *"we don't have the intention to grow bigger. I think as we are now with the agritourism business, the winery the wine tastings and visits, that is the maximum we can do for it to stay a family business"*.

He continuously emphasises the fact that they *"are a family business"*; meaning that it is a big commitment due to the fact that only the nuclear family manages the winery business. *"It's not an easy type of work. You really have to love it otherwise ... there are periods where you work 9 days a week and 36h a day, but you do it. Especially my brother who takes care of the agricultural, the viticulture side; the nature doesn't wait for you"*. Marco continues: *"when there is work to do we do it, even if it's Sunday, or Monday you do it"*.

Even though he emphasises the difficult nature of his work, he notes: *"I want to do this, and most of the people share this view"*. He does not refer to his work as a job but as a passion, which has developed from a young age. As a child, going into the vineyards and helping the parents in the winery was considered *"a game"*. This game *"then was transformed into a passion"*. He notes: *"we've grown up in these surroundings and we are in love with what we are doing, it's not even work; it's a passion that grows every day"*.

#### **Vignette 5 - Identity Work and Identity Regulation**

The vignette presented above reveals the family winery's past diversification activities as well as their reluctance to pursue future wine tourism activities.

Identity work and identity regulating forces are evident within Marco’s discourse. When discussing wine tourism diversification, Marco engages in identity work in order to construct his preferred self-identity. He draws on a number of discursive resources to construct his identity, notably, family, profession and entrepreneurship. However, his discourse also outlines how identity-regulating forces, notably, talk about family, local wine-producing community and agricultural profession, influence his identity construction (table 11).

The following section will discuss these identity-regulating forces in relation to the above vignette. Marco’s discourses are compared and contrasted with other wine producers’ discourses to illustrate how wine producers either adhere to or oppose the social/cultural norms and how this impacts on wine tourism diversification decisions.

**Regulating Forces**

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Talk about Family	-Family tradition, values and norms -Dominant coalition in the decision-making process
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Local wine-producing community	-Agricultural mentality -The need to adopt an agricultural lifestyle
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Winemaking/agricultural profession	-Perception of being a ‘real’ wine producer
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**Table 11 - Identity Regulating Forces**

**Talk about Family**

First of all, it is important to note that wine producers engage in discourse about the family to reveal the importance of the family in the management of the winery. As illustrated in the vignette above, Marco’s narrative reveals the central role of the family, constituting the dominant coalition in the winery:



*“**My parents** have started [the winery], especially **my mother** in that sense... we are a **family business** so it could also be **my brother**. Initially **my mother** did the wine tastings, as I was still studying. She did that whereas **my father** is more involved in the agricultural part, but he also helped a lot with the wine tastings... We want to stay small and a **family business** not becoming commercial and move towards promoting the winery to receive mass tourists”.*

The framing of the family (in bold) through his discourse emphasises the importance of the nuclear family in managing the winery. Even though each family member has been allocated a specific role/task in the winery, Marco's discourse reveals a certain degree of flexibility amongst family members. The family is recognised as the dominant coalition that establishes management control mechanisms to ensure the family's interests and organisational goals are achieved. They wish to be in control of the winery as well as the various diversification activities. Similarly, other wine producers interviewed for this case study, highlight the importance and central role of the family in the management and decision-making processes of wineries, as the following discourse demonstrates:

*Surely the family has a **very important role**, because family companies are based on the **family relationship**, meaning that difficulties, and achievements are all **reached together**. Difficulties are overcome all **together**. If there are difficulties, you are **in a family** and you speak with members of the family. It's not like in a company where the owner doesn't have a member of the family involved, so it's also a **group action** for better or for worse. So there is a sharing of all the problems and nice things that can happen. So for me the **role of the family is really important** (Case 13).*

The discourse topicalises words associated with the importance of the family in the winery. It highlights the harmony and close connection of the family when taking business decisions. The winery in case 13 is owned and managed by two brothers, Fabio and Matteo, representing the 3<sup>rd</sup> generation of the family winery. Matteo is in charge of the agricultural and production part of the winery, whereas Fabio concentrates on the administrative and

commercial part. The discourse also denotes the emotional attachment to the family but also to the business. The achievements of the winery have been reached together and the challenges the winery might face are shared and discussed amongst family members, thus highlighting the importance of the family.

Secondly and conversely, it could be argued that discourses about the family both discipline and are a key resource for identity work (Brown and Lewis 2011). Table 12 indicates that when constructing traditional agricultural identities, wine producers actively engage in identity work, predominantly narrative identity work, to position themselves as dedicated family members. They draw on the family as a discursive resource to narrate stories about the family, the past and the family tradition. Wine producers construct traditional, agricultural identities, highlighting their willingness to “*stay a family business*” and follow the family tradition.

Similarly, as illustrated in the vignette above, Marco engages in identity work by stating on multiple occasions throughout the interview that: “*we are a family business*”. This relatively broad statement can be interpreted in various ways. It could be argued that the implicit meaning of this statement not only relates to the central role of the family in the winery, but also to the family history, tradition and his strong sense of pride. Marco is proud to be a part of the family winery. In this instance, family is seen as a resource for identity work to construct traditional wine producer identities.

### **Traditional Wine Producer Identities**

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*“That is the maximum **we** can do for it to **stay a family business**” (Case 9)*

*“**We** want to work a certain way, and we also don't want to become too big that **we** need to have employees so... Exactly as **we've** done until now. From taking care of the vineyards to checking-in clients, bottling, so everything is done by **us**” (Case 9)*

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*“It is important to continue to keep it (tradition)” (Case 12)*

*“**We** like to stay like this. **We** like to **stay a family business** and **we** would like to manage the visits ourselves, without having to employ a person, who will do the visits for **us** (Case 12)*

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*“So originally the brand [name] as viticulture in this area ... is from 1670, with vineyards and a winery in this area. They’ve already made wine and also agricultural products. Then **my grandfather** [name], in fact the company is named after him, and since the 70s concentrated only on the viticulture ... It’s really just work that focuses on quality and **tradition** ... This is today’s **philosophy**, so more **traditional** and more quality” (Case 28)*

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*“It was a **family** decision and it is part of our **philosophy**”. “It is not the **family’s** intention to change this” (Case 23)*

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*“**My grandfather** was born in 1885, and has always worked in the vineyards. **His father** already owned vineyards and let’s say from 1900, the tradition started. But at the beginning he only sold the grapes and then he started to produce, but he also had to go to war. Then **my father** was born and then from 1955 we started to sell wine, he started to commercialise the wine. **My father** started to bottle the wine and sell to private clients” (Case 7)*

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**Table 12 - Talk about Family**

However, it could be argued that talk about the family (e.g. family stories) exercises disciplinary power over wine producers, thus limiting their subjectivities. While wine producers actively engage in narrating stories about the family, tradition and past, these narrated life-stories are likely to restrain wine producers from constructing entrepreneurial, un-conventional identities. In this instance wine producers adhere to the family norms, tradition and values.

Marco’s statement (case 9) *“that is the maximum we can do for it to stay a family business”* indicates his unwillingness to pursue diversification activities. In this instance, talk about the family is recognised as an identity regulating force. Business decisions (e.g. wine tourism diversification decisions) are taken to adhere to the family norms and values. Correspondingly, Christina (case 23) expresses in relation to wine tourism diversification that *“it was a family decision and it is part of our philosophy”. “It is not the family’s intention to change this”* (table 12). It could be argued that her discourse about the family influences her identity construction. Christina represents the 7<sup>th</sup> generation of the family winery and has only been working at the winery for a couple of years. Her discourse about the family acts as a regulating force on her identity construction due to the fact that she adheres to the family decisions, norms and values.

It could be argued that although both, Marco (case 9) and Christina (case 23) form part of the younger generation of wine producers, they do not engage in identity work to construct entrepreneurial identities, but strongly identify with the family and adhere to the family tradition. In this instance, both participants can be identified as traditional wine producers, aiming to sustain a strong family identity through highlighting their unwillingness to pursue wine tourism diversification.

However, it is important to note that for some wine producers – constructing predominantly entrepreneurial identities – the family and the family tradition are not identified as an identity-regulating force, but as a driver for wine tourism diversification. In this instance, entrepreneurial wine producers display their willingness to engage in wine tourism diversification in order to sustain and/or strengthen the family identity and the continuity of the family line, as the following discourse demonstrates:

*“**Tradition and innovation** have to work hand in hand ... [Consequently] the business **aims to grow**, we’re currently investing, for example in the construction of the restaurant, we’re looking for new vineyards, we’re looking for new countries to sell our wines ... The family continues to be the **driving engine** of the company” (Case 20)*

Paolo (case 20) adopts an entrepreneurial perspective and displays his willingness to pursue wine tourism diversification. He highlights the importance of the family tradition and the dominant family coalition when pursuing diversification. For Paolo’s family, wine tourism diversification is recognised as a beneficial strategy to maintain the family tradition, guarantee transgenerational sustainability and keep family control. Similarly, the following accounts reveal the importance of the family in pursuing wine tourism diversification:

*“So in 10 years I would like to finish the extension, finish the rooms, finish the kitchen and that would be already a **big commitment**, and frankly this would be what I set for myself to do in the future ... And then leave it for my son what I will be constructing in the next 10 years. Already this project is **very ambitious**. It’s not a small project for us” (Case 13).*

*“We also have a little shop in the centre of town, that we open once in a while. Well we’re waiting until one of the children is a bit older and physically goes there to open the shop. We are only 2. So this would be the idea that in the future one of the kids is going to open the shop” (Case 26).*

In this instance, both wine producers construct entrepreneurial identities and reveal their willingness to pursue wine tourism diversification. Wine tourism diversification is influenced by the need to keep family control and transfer the family business to the subsequent generation, thus safeguarding the family tradition. Similar to the previous excerpt, wine tourism diversification is identified as an approach adopted by wine producers to strengthen the family identity.

Consequently, this section reveals that talk about the family both disciplines and is a resource for identity work. While wine producers draw on family as a discursive resource to construct traditional identities, these same discourses have also been depicted as disciplining their self-constructions. In this instance, stories about the family, tradition and family history exercise a disciplinary function and as a result are likely to limit wine tourism diversification. By contrast, entrepreneurial wine producers break free from the identity regulating constraints by actively engaging in identity work. Their desire to sustain and/or strengthen the family identity drives wine tourism diversification. The following section will examine how the social norms set by the local wine-producing community regulate wine producers’ identity constructions.

## Local wine-producing Community

There is a general assumption amongst the wine-producing community that wine producers have to spend the majority of their time in the vineyards, to be recognised as a 'real' wine producer. Wine producers' priority should be their vineyards.

*“There are people who do this job that don't even know where the vineyards are ... That's not a passion. I've always said wine producers who have luggage in their hand 24h for me are not wine producers. Because you **have to be in the vineyard**, that's **important**, and you're **more believable** ... I **only believe** in the producers who work in the vineyard” (Case 7)*

This discourse reveals the traditional, agrarian mentality adopted by the local community as well as the wine producer's strong attachment to place. In this instance, when discussing wine tourism diversification, the wine producer's self-construction is regulated by the social norms set by the local community. He emphasises his reluctance to pursue wine tourism diversification and prioritises his work in the vineyards, as he wants to be identified as “*more believable*” amongst the local community. Furthermore, he depicts entrepreneurial wine producers as having “*luggage in their hand 24h*”. He does not “*believe*” in these producers. It could be argued that the local wine-producing community ‘expects’ wine producers to adopt an agrarian approach and mind-set, if they want to be considered as high-quality wine producers. The local community does not perceive entrepreneurial wine producers as ‘real’ wine producers as they tend to challenge and oppose agricultural traditions through engaging in wine tourism diversification. In this instance, it could be argued that traditional wine producers highlight their strong attachment to place, while depicting entrepreneurial wine producers as having a weaker place attachment. Engaging in wine tourism diversification is believed to threaten traditional wine producers' sense of place.

However, relating to the vignette presented above (vignette 5), Marco engages in identity work to position himself and his family as entrepreneurs when discussing wine tourism diversification and thus challenges the social/cultural norms set by the local community.

*“We were the first to open an agritourism business in Barbaresco... the people around here thought she was crazy, because no one would come here to visit this area. But she said they were crazy”.*

The discourse indicates both the family’s innovative and entrepreneurial approach as well as the separation of ‘the self’ from ‘the other’, notably the local community. During the 1990s, when the family took the decision to diversify, tourism was at the initial stage of development and most wineries did not consider pursuing this opportunity of developing tourism activities. Marco engages in identity work when differentiating himself and his family from the local community (e.g. *“the people around here”*). The local (wine-producing) community is depicted as traditional, narrow-minded and reluctant to change. Marco actively challenges the social/cultural norms and traditions set by the local community, and adopts an entrepreneurial identity. It could be argued that wine tourism diversification is criticised and is not accepted by the local wine-producing community. The family is referred to as ‘crazy’. Furthermore, Marco challenges the social norms set by the community and engages in identity work when producing the following discourse:

*“There are also those who don’t want to open and don’t want to do wine tastings as they think it is their secret ... I speak with colleagues and friends who are producers and they say they don’t have time for wine tastings because they need to work in the vineyards or at the winery”.*

In his discourse, he constructs an entrepreneurial identity and differentiates himself from his winemaking colleagues and friends, who he depicts as ‘traditional’ and ‘narrow-minded’. Both statements *“they think it is their secret”* and *“they need to work in the vineyards”* indicate wine producers’ traditional and agricultural mind-set. While Marco actively opposes the cultural norms,

traditional wine producers adhere to the social/cultural norms and do not recognise the potential benefits linked to wine tourism diversification. It could be argued that there is a general assumption amongst the wine-producing/agricultural community that 'real' wine producers have to adopt a certain lifestyle where the winemaking profession directs/regulates their daily lives.

Consequently, this section has outlined the regulating force of the local wine-producing community when constructing a positive sense of self. Wine producers adhere to the social norms to gain acceptance and build credibility. They want to be respected and recognised amongst the local wine-producing community as 'traditional', 'real' wine producers, producing high-quality wines. The following section will examine wine producers' own perception of the winemaking profession as an identity regulating force.

### **Perception of the Winemaking Profession**

While Marco actively positions himself and his family as entrepreneurs in relation to wine tourism diversification, his discourse seems contradictory when discussing his work/profession, as he refrains from adopting an entrepreneurial identity. He argues: "*I want to do this, and most of the people share this view*". It is interesting to note that through his discourse he adheres to the social norms and tries to secure legitimacy for his professional identity by stating that "*most of the people share this view*". It could be argued that when relating to his work as a wine producer, he is not looking to oppose the social norms and displays a professional and agricultural identity. In this instance, Marco's own perception of the winemaking profession disciplines his identity work and shapes his self-identities.

On the one hand, Marco highlights his family's entrepreneurial mind-set in relation to past wine tourism diversification activities, such as winery visits, wine tastings and the development of a B&B. He engages in identity work and adopts an entrepreneurial identity. He challenges the social norms set by the local wine-producing community and depicts his winemaking colleagues as



traditional and narrow-minded. On the other hand, when discussing the importance of his work/profession, Marco tries to secure legitimacy for his identity as a wine producer. While the family has been entrepreneurial in the past, it could be argued that future wine tourism diversification is likely to threaten Marco's as well as his family's identity of being 'real' wine producers. Similarly, Elena's identity (case 15) of a traditional wine producer is regulated by her perception of the winemaking profession:

*"I wouldn't be able to also run an agritourism business, because that would be too much. I believe that you **have to make choices**, if you want your **work to be done correctly**" (Case 15)*

The discourse indicates her reluctance to pursue wine tourism diversification and invest in the construction of an agritourism business. Her statement "*you have to make choices, if you want your work to be done correctly*" implies her priority for the winemaking profession. She assumes that engaging in wine tourism diversification requires a considerable amount of time and would interfere with being a professional wine producer. She would be unable to practice her profession '*correctly*'. In this instance, business decisions are taken in the light of the winemaking profession.

Correspondingly, in case 14, the family winery's decision-making is influenced by the wine producer's perception of the winemaking profession, as the following discourse demonstrates:

*"It might work as we have the facilities, but ... opening a restaurant, not at all. So that's **not our profession**, so we are **not interested** in doing that" (Case 14)*

The wine producer displays her unwillingness to diversify into tourism. In her discourse, she admits to have the adequate facilities to either invest in the construction of an agritourism business or the development of a restaurant, however, her statement "*this is not our profession*" implies her priority for the winemaking profession and her unwillingness to engage with the tourism

profession. Her perception of the winemaking profession regulates her identity of a traditional wine producer, indicating that they are “*not interested*” in wine tourism diversification. Furthermore, the wine producer in case 22 produces a similar discourse regarding wine tourism diversification:

*“I mean for a small winery like ours, you **have to choose** what you want to do with your resources. So it (wine tourism diversification) **would change our work** and it’s not really the work we would like to do” (Case 22)*

The discourse clearly shows that the wine producer’s decision not to engage in wine tourism diversification is guided by his assumption about the winemaking profession. He assumes that wine tourism diversification would “*change*” his work. This statement can be interpreted in the way that wine tourism diversification would not only change his work/profession but would also change his identity of being a ‘real’ wine producer. In this instance, it could be argued that the majority of wine producers adopt a conservative perspective, where their own perception of the winemaking profession disciplines their identity work and influences their decision-making process, thus limiting wine tourism diversification.

This section of the findings chapter has examined various identity regulating forces, notably talk about the family, social norms set by the local wine-producing community as well as wine producers’ own perception of the winemaking profession, influencing the perception of their self-identities. It has been argued that identity formation constitutes a complex interplay between identity work and identity regulation. When highlighting their willingness to pursue wine tourism diversification, wine producers actively engage in differentiating, aspirational and personalising identity work to construct a positive sense of self. They actively challenge the agrarian mentality and the social norms set by the local wine-producing community and position themselves at the entrepreneurial end of the identity continuum (table 13).

	<b>Willingness to pursue Wine Tourism Diversification</b>	<b>Unwillingness to pursue Wine Tourism Diversification</b>
<b>Position on the Wine Producer Identity Continuum</b>	Entrepreneurial	Traditional
<b>Identity work</b>	-Differentiating identity work -Aspirational identity work -Personalising identity work	-Differentiating identity work -Aspirational identity work -Narrative identity work
<b>Identity regulation</b>	Challenge/oppose norms and values set by the local wine-producing community	-Talk about Family -Local wine producing community (agrarian mentality) -Own perception of winemaking profession

**Table 13 - Wine Tourism Diversification and Identity Formation**

By contrast, when highlighting their unwillingness/reluctance to diversify into wine tourism, wine producers engage in differentiating, aspirational and narrative identity work to construct predominant agricultural identities and position themselves at the traditional end of the identity continuum. It has been argued that talk about the family, the agrarian mentality and their own perception of the winemaking profession discipline their identity work and constrain them from constructing unconventional, entrepreneurial identities. Consequently, the complex interplay between identity work and identity regulation explains wine producers' decision-making process and thus their willingness or unwillingness to diversify into wine tourism (table 13).

## **5.5. Chapter Summary**

This chapter examined the various motives underlying family wineries' decisions to diversify into wine tourism. The analysis of the data revealed that wine producers' motives for wine tourism diversification constitute a complex interplay between economic and social motives. However the economic-social dichotomy is only part of the explanation and it has been argued that deeper, subconscious motives related to identity, provide a fuller, more robust explanation of family wineries' decisions to engage in wine tourism diversification. The analysis of the data revealed that wine producers' diversification decisions are inextricably linked to their identity constructions.

In this instance, it has been argued that focusing on identity deepens the understanding of family wineries' motivations and decisions to diversification. Wine producers actively draw upon wine tourism diversification discourses to construct a distinctive, coherent and desired sense of self, which in turn influences their decisions to wine tourism diversification.

Furthermore, it has been argued that identity formation constitutes a complex interplay between identity work and identity regulation. Wine producers engage in identity work to position themselves on a continuum of wine producers identities, ranging from 'traditional' to 'entrepreneurial'. On the one hand, when constructing traditional agricultural identities, wine producers engage in differentiating, aspirational and narrative identity work, which is simultaneously being disciplined by social practices and discourses, notably discourse about family, winemaking profession and agrarian mentality. Constructing traditional identities, wine producers display a strong place attachment and highlight their reluctance to pursue wine tourism diversification. On the other hand, wine producers actively engage in differentiating, aspirational and personalising identity work and challenge/oppose social forces and practices to position themselves on the entrepreneurial end of the identity continuum. Entrepreneurial wine producers highlight their willingness to pursue wine tourism diversification.

While this chapter depicted the findings from the inductive analysis of the data in relation to the motives underlying family wineries' decisions to diversify into wine tourism, the following chapter will extend this discussion through linking the findings emerging from the analysis of the data with the current debates in the literature. A multi-layered conceptual framework is adopted to discuss the conscious, semi-conscious and unconscious motives underlying family wineries' wine tourism diversification decisions.

## **6. Chapter VI – Discussion Chapter**

### **6.1. Introduction**

This thesis set out to examine the motives underlying family wineries' decisions to diversify into wine tourism. The earlier review of the literature established that diversification motives have predominantly been researched from a profit-maximisation perspective, highlighting the prevalence of economic motives for diversification. This thesis argues that while the conscious reasons/motives for diversification (e.g. economic and social motives) have been largely addressed/researched within the literature, the semi-conscious and unconscious motives have only received limited attention. Wine producers' identity formation was revealed as an underlying motive for wine tourism diversification.

This chapter adopts a layered approach in order to gain a deeper understanding of the motives for wine tourism diversification. The chapter will first of all outline the multi-layered conceptual framework of wine tourism diversification motives, before turning attention to each layer separately to determine the conscious, semi-conscious and unconscious motives underlying family wineries' diversification decisions.

### **6.2. Multi-layered Conceptual Framework**

Figure 15 outlines the multi-layered approach that can be developed from the established theorising to discuss family wineries' decisions to diversify into wine tourism. It is important to note that a layered approach has not yet been adopted for examining diversification decisions. Accordingly, this thesis provides a new insight into understanding subconscious motives for diversification. The first layer refers to the socioeconomic layer and denotes the conscious motives for wine tourism diversification, notably wine producers' economic and/or social motives for diversification. It is argued that wine

producers diversification decisions reveal a complex interplay between both economic and social motivations. The second layer, that is, the family layer, refers to another set of conscious social motivations for diversification notably, the preservation of family businesses' socioemotional wealth. As highlighted earlier, the importance attached to preserving their socioemotional wealth (SEW) is likely to influence family wineries' decisions to diversify into wine tourism (Gomez-Mejia et al. 2010).

It is argued that while the first two layers (e.g. socioeconomic layer and family layer) have been addressed within the agricultural and family business literature and refer to the conscious motives for diversification, the third and fourth layers of the conceptual framework (identity layer and power layer) refer to the semi-conscious and unconscious motives for diversification and have only received limited attention within the literature. The third layer indicates wine producers' active engagement with diversification as a resource for identity work. It is argued that wine tourism diversification triggers identity work. Wine producers' diversification decisions are driven by the desire to construct a preferred and positive sense of self.

Finally, the deepest layer refers to wine producers' manifestation/expression of their unconscious motives for diversification, notably through identity regulating forces. The findings revealed that social discourses and practices influence wine producers' behaviour as well as their conscious decision-making process. In the following, the four layers of motives driving family wineries' diversification decisions will be discussed in turn in order to get an in-depth understanding of the conscious, semi-conscious and unconscious motives for diversification.

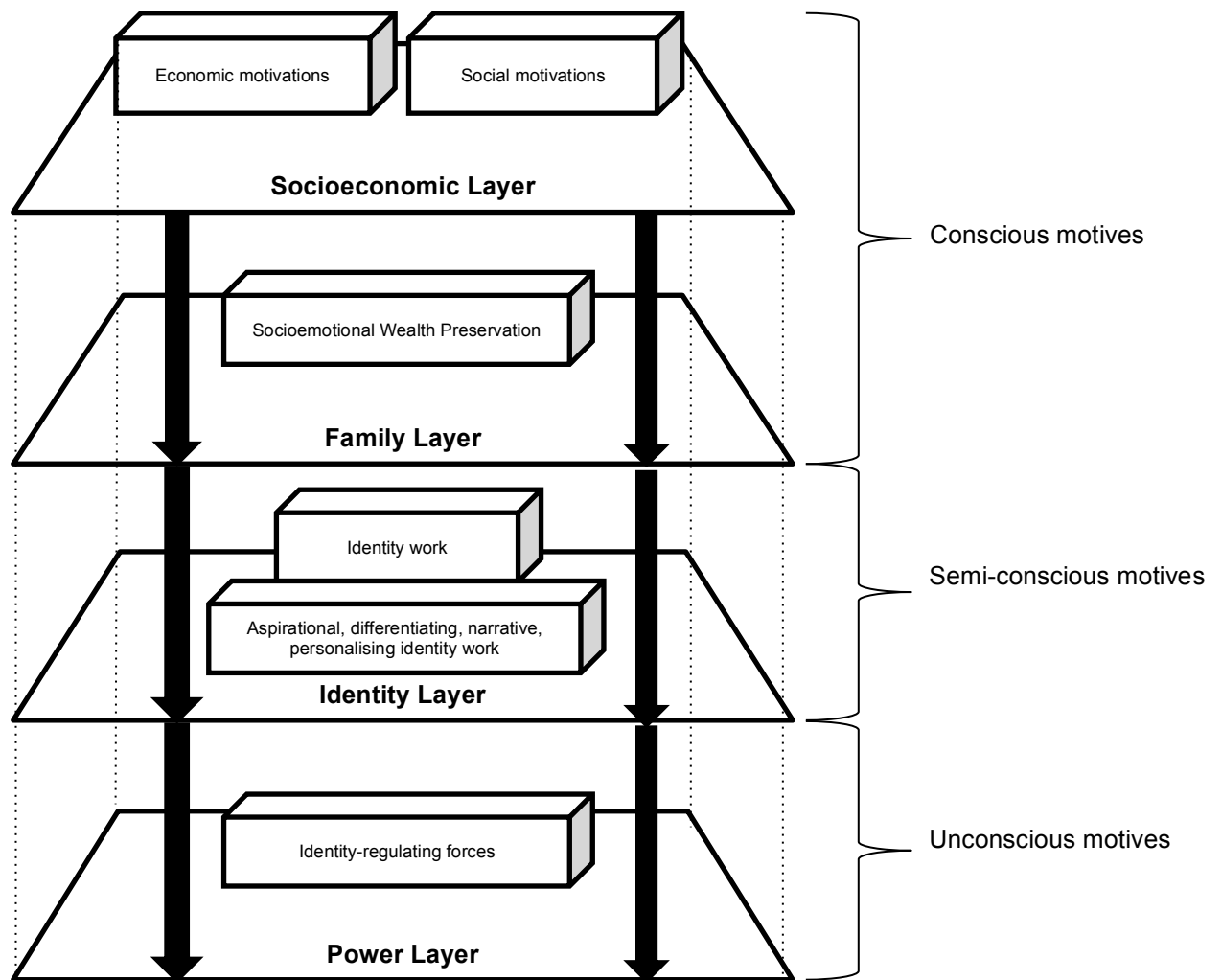


Figure 15 - Multi-layered conceptual framework of wine tourism diversification motives

### 6.3. Socioeconomic Layer

The socioeconomic layer, presented in figure 15, refers to the economic and social motivations for diversification. As established earlier, diversification is depicted in the agricultural literature as a successful survival strategy for farmers and farm businesses (Alsos and Carter 2006; Barbieri et al. 2008; Lopez-i-Gelats et al. 2011). It is believed that farmers diversify in order to avoid uncertainties and reduce agricultural risks (Meraner et al. 2015). The majority of studies on farmers' motivations for diversification have led to the conclusion that these motivations are predominantly economically driven and directly related to economic benefits, performance and profits (e.g. Barbieri and Mahoney 2012; Bowler et al. 1996; McGehee and Kim 2004; Sharpley

and Vass 2006). By contrast, the findings revealed that family wineries' motives for diversification are driven by a complex interplay between economic and social motivations. While certain wine producers predominantly highlight their financial/economic motives for wine tourism diversification, others reveal the importance of social/nonfinancial motives.

First, wine producers accounts reveal their economic motives for wine tourism diversification, notably the generation of additional income and the importance of direct sales at the winery. Maintaining or increasing the winery's income is considered a principal economic motive for wine tourism diversification (Barbieri and Mahoney 2012; McGehee and Kim 2004). Particularly, small family wineries recognise wine tourism diversification as a beneficial strategy for increasing their revenue and moving their products quicker. Many small-scale family wineries do not have the necessary finances to promote their wines on an international basis, and their production levels are too small to attract major wine distributors. In this instance, engaging in wine tourism diversification activities, such as winery visits, wine tastings and cellar door sales, allow small family wineries to increase their income.

While previous studies on tourism diversification displayed farmers' disappointments and the limited economic benefits from diversifying into tourism (Hjalager 1996; Opperman 1996; Sharpley and Vass 2006), the findings of this study revealed wine producers' general contentment with wine tourism diversification, particularly highlighting the economic benefits. Although the findings revealed some negative experiences with regards to wine tourism diversification, the majority of participants refer to diversification as an efficient, informal and convenient strategy to generate additional income. They denote that cellar door sales enable them to increase their margins, due to the fact that they sell their wines at higher prices to tourists at the winery, compared to importers and restaurants. Wine producers further highlight the importance of cellar door sales in relation to direct payments; noting that while payments from importers and restaurants tend to take a couple of months, wine tourists pay at the winery at the time of purchase.



Furthermore, the findings revealed that wine producers diversify into tourism through predominantly offering a combination of activities. As highlighted within the findings chapter, all the participants – with the exception of two – have developed the activity of cellar door sales in combination with winery tours and wine tastings (see section 5.2. Wine Tourism Diversification Activities). It could be argued that offering a combination of tourism activities is likely to lead to higher levels of income/revenue. Generally, wine producers in this case study conduct a winery visit, before offering visitors a wine tasting session of their different wines and finally giving them the possibility to acquire some bottles of wine. An efficient strategy developed by the majority of wineries in order to guarantee at least a small income from each visit, is the introduction of the wine tasting fee. If at the end of the wine tasting session, tourists do not purchase a certain amount of bottles, they are required to pay a wine tasting fee. In this instance, wine producers are able to benefit financially from receiving tourists at their winery. Consequently, wine tourism diversification activities, especially cellar door sales are perceived as an important additional sales channel for small wine-producing families (Beames 2003). In this instance, wine tourism diversification is referred to as a short-term, beneficial strategy to increase cellar-door sales (Charters and Menival 2011; Tomljenovic 2012).

While these diversification activities mainly reveal wine producers' economic motivations for diversification and were developed to increase family wineries' margins and revenues, the findings revealed that especially medium and large-sized family wineries are financially stable, due to their high export level, and their decisions to diversification are not primarily financially driven. As highlighted in section 5.3.2 on social motives for diversification, some family wineries' export levels can reach up to 85%, meaning that wine tourism diversification is not identified as a necessity to generate additional income. In this instance, wine producers are not only driven by financial motives, but their motivations for wine tourism diversification are also socially driven (Barbieri 2010; Hansson et al. 2013).

The earlier review of the literature revealed a number of social motivations for diversification, notably closer contact with customers, (Hansson et al. 2013), pursuing a rural lifestyle, and/or socialising and educating visitors (Barbieri 2010). Similarly, the findings of this case study discerned various social/nonfinancial motives for wine tourism diversification, notably wine producers' desire to share their passion with tourists, building long-term relationships, offering a cultural experience, educating tourists, as well as increasing wineries' visibility. Wine-producing families perceive wine tourism diversification to be a beneficial strategy to share their passion with people from all over the world, and build long-term relationships. Wine tourism activities give them greater satisfaction, as they are able to share their family history, ancestors' success stories and winemaking tradition. Wine producers' accounts further reveal the importance of face-to-face contact and interaction with wine tourists as a way of receiving direct feedback on the quality of their wines.

However, wine producers' accounts display a complex and sometimes conflicting combination of social and economic motivations, as the vignette in section 5.3.3 of the findings chapter illustrated. Being a small-sized family winery, Pietro noted that from an economic perspective his winery has benefitted from wine tourism diversification, as it has increased the winery's revenue, due to the fact that the products move quicker. From a social perspective, Pietro highlighted his general satisfaction in relation to wine tourism diversification. Building relationships and making friends are considered important social motivations for diversification.

Furthermore, the findings chapter revealed that even though wine producers' discourses display social motives for wine tourism diversification, they are aware of the fact that in the long run, they are likely to benefit economically from wine tourism diversification due to their increased visibility. In this instance it has been argued that wine tourism diversification ultimately results in increased export opportunities for wineries, thus increased revenue and generation of additional income.

As established earlier, the agricultural literature has only paid limited attention to understanding the complex interplay between economic and social motivations. Instead, it is assumed that farmers' decisions to diversification are primarily profit-driven to reduce agricultural risks and financial insecurities. Adopting a financial approach to researching motivations for diversification, or as in this instance, focusing only on the socioeconomic layer, will only reveal wine producers' conscious (e.g. social and economic) motives for diversification. While it could be argued that for some family wineries, social and/or economic reasons/motivations might be the only motives for engaging into wine tourism diversification, the analysis and interpretation of the empirical data revealed multiple reasons/motives for diversification, notably semi-conscious and unconscious motives. In these instances, this thesis argues that the socioeconomic layer is unable to account wholly for wine tourism diversification. The first layer of the conceptual framework does not consider the context-dependency of the motives underlying wine producers' decisions to diversify into wine tourism (Hansson et al. 2013).

Consequently, taking the social context into consideration, including individual families' experiences and meanings, allows for a deeper understanding of the motives for wine tourism diversification. In this instance, it is argued that the family layer offers a deeper understanding of family wineries' motives for diversification. The following section turns to examining the second layer of the conceptual framework.

## 6.4. Family Layer

After having discussed family wineries' economic and social motives for diversifying into wine tourism, attention is turned to the deeper family layer of the conceptual framework, taking the socio-cultural context into account. It is argued that family wineries' motives for wine tourism diversification are driven by the importance of preserving their socioemotional wealth.

As developed earlier, family wineries in this case study are both owned and managed by members of the nuclear or extended family. Family members' accounts reveal the importance of the family when managing the winery. The family is recognised as the dominant coalition that establishes management control mechanism to ensure the family's interests and organisational goals are achieved. Vignette 5 (in section 5.4.2.1.) illustrated the central role of the family, constituting the dominant coalition in the winery. Marco's talk about the family revealed not only his attachment and commitment to the family winery but also the importance of keeping family control. In this case, the winery is only managed and controlled by the nuclear family. They wish to be in control of the winery as well as the various diversification activities. The findings displayed family members' desire to exercise and maintain control of the family winery, manage the day-to-day activities and hold the decision-making power. The inclusion of family members in the winery, rather than nonfamily employees, is emphasised on multiple occasions as a way of safeguarding the tradition and keeping family control.

As the earlier review of the literature established, family businesses are unique due to a number of family features included in the businesses (Daugherty 2013), notably families' long-term orientation, family tradition, values and norms, and transgenerational sustainability. These family features constitute the *family system* and in turn impact the *business system*. While the business system is recognised as a profit-driven and success-oriented institution, the family system is described as an arena for emotions and irrationalities (Johannisson and Huse 2000). The two systems are depicted as

conflicting, with each system having different goals and objectives, leading to reduced profits and ultimately business failure (Aldrich and Cliff 2003; Kets de Vries 1993). Consequently, the economic maximisation view regards the *family system* to be incompatible and/or interfering with the *business system*, leading to inertia, lack of entrepreneurship, inflexibility, conservatism, and resistance/reluctance to change (Kets de Vries 1993; Nordqvist and Melin 2010). Accordingly, it is argued that family businesses are unable to respond to changes in the external environment, causing decreasing firm performance levels.

However, the findings of this study revealed that family wineries actively engage in entrepreneurship, notably wine tourism diversification. It is interesting to note that while the family business literature depicts family tradition/culture, transgenerational sustainability and employment of family members as negative family features, impeding decision-making and company growth (Laforet 2016), the findings of this case study indicated that these family features are fundamental motives for wine tourism diversification, hence company growth and expansion. These family features will be elaborated theoretically below in relation to the empirical findings.

First, as established earlier, the employment of family members, referred to as nepotism within the literature, is recognised as a major weakness of family businesses. Employing family members regardless of their competencies has been regarded as damaging the efficiency and threatening the survival of family businesses (Carney 2005). The findings revealed that in order to include the new generation into the family business, family wineries engage in a number of growth and expansion strategies, such as market expansion, product expansion and most importantly wine tourism diversification. Current family winery owners express their desire to engage in entrepreneurship and develop and expand the family business in order to employ family members. Family wineries diversify into tourism through investing in the construction of wine tasting facilities, B&Bs and restaurants in order to offer the subsequent generation distinct areas of responsibilities within the business. Thus, it is argued that the subsequent generation plays an important role in family

wineries' development plans. Current investments in diversification activities serve as future opportunities for subsequent generations (see vignette 3 in section 5.4.1.2).

Similarly, linked to the employment of family members and transgenerational sustainability, wine producers' accounts reveal that their engagement in wine tourism diversification is motivated by the importance of keeping the family tradition. While the literature perceives family tradition to be a negative family feature leading to inflexibility, inertia and lower levels of entrepreneurship (Kets de Vries 1993), wine producers' engagement in wine tourism diversification is driven by their desire to continue the family tradition. In this instance, the family is identified as a driver for wine tourism diversification. Wine producers' discourses (e.g. case 13, 20 and 26) highlight their willingness to pursue wine tourism diversification in order to guarantee the continuation of the family tradition. It is believed that including the subsequent generation into the family business will safeguard the family tradition, as they will follow in the footsteps of their ancestors. Thus, wine tourism diversification is recognised as a beneficial strategy to maintain the family tradition, guarantee transgenerational sustainability and keep family control. In other words, family wineries actively engage in wine tourism diversification to employ family members (e.g. younger/new generation) in the business, maintaining the dominant family coalition, exercising family control and continuing the family tradition, thus preserving families' socioemotional wealth.

However, as the previous review of the literature denotes, it is believed that family businesses diversify less and are less entrepreneurial compared to nonfamily businesses (Gomez-Mejia et al. 2010; Jaskiewicz et al. 2015), the main reason being that families' decision-making process is driven by their desire to preserve their socioemotional wealth. As established earlier, the family's socioemotional wealth (SEW) refers to a set of nonfinancial goals and objectives that meet families' emotional needs (Gomez-Mejia et al. 2010). Family wealth protection, transgenerational sustainability, long-term orientation and preservation of family control (Hall and Nordqvist 2008; Schmid et al. 2015) are depicted in the family business literature as

nonfinancial/social motives, influencing family businesses' decision-making process. In this instance, family businesses are perceived to be fundamentally different from nonfamily businesses, as they tend to be more concerned about nonfinancial gains and rewards (Berrone et al. 2012).

A direct link is established between the level of diversification and the level of SEW. When making diversification decisions it is assumed that family businesses can either opt for higher levels of diversification in order to reduce business risk but at the expense of the family's SEW, or decide to engage in lower levels of diversification and thus preserve and sustain SEW (Gomez-Mejia et al. 2010). In this instance, diversification is directly related to the loss of SEW (Gomez-Mejia et al. 2010). Previous research demonstrated that family businesses limit the level of diversification, as they are predominantly motivated to sustain/preserve their socioemotional wealth (e.g. Gomez-Mejia et al. 2010). It is argued that in order to preserve SEW dimensions, such as family control, emotional attachment, transgenerational sustainability and members' identification with the business (Berrone et al. 2012), family businesses tend to engage in lower levels of diversification.

By contrast, the findings of this case study demonstrated that family wineries actively engage in higher levels of diversification in order to preserve and increase their socioemotional wealth. While the literature revealed that family businesses diversify less in order to preserve family control, the findings of this case study demonstrated that family wineries are still able to keep family control even after having diversified into tourism. This is typically achieved through family members controlling and managing a distinct area of the family winery. The family still comprises the dominant coalition, is able to exercise control and hold the decision-making power. In this instance, wine tourism diversification is not only perceived as a beneficial strategy to generate additional income and increase the wineries' revenue, but also to preserve and increase families' socioemotional wealth.

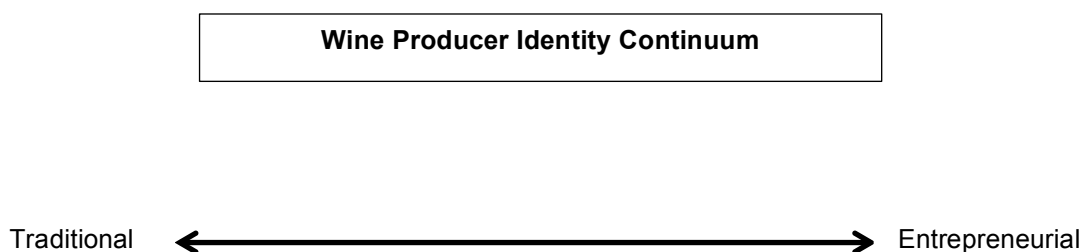
Consequently, the family layer of the conceptual framework has taken the social/family context into consideration and argued that family businesses' diversification motives are dependent on the context of the winery and the wine-producing family (Hansson et al. 2013). As established earlier, the agricultural and family business literatures have not yet reached a consensus about the prevailing social and economic motives for diversification. While for some family wineries, social and/or economic motivations might be the only motives for engaging into wine tourism diversification, this thesis provides a more encompassing explanation with regards to diversification decisions and motivations and reveals multiple reasons/motives (e.g. semi-conscious and unconscious motives) for diversifying into wine tourism. It is argued that wine tourism diversification triggers wine producers' identity work. Wine producers' diversification decisions are driven by the desire to construct a positive sense of self. Identity formation is regarded as influencing wine producers' behaviour and decision-making process. Accordingly, the following section will discuss the third layer of the conceptual framework, notably the identity layer.

## **6.5. Identity Layer**

After having discussed wine producers' conscious motives for diversification, notably their economic and social motivations for diversification, the following section turns attention to the third and deeper layer of the conceptual framework, notably the identity layer. The identity layer refers to the semi-conscious motives for wine tourism diversification and notes that wine producers, having a degree of agency, actively engage in identity work to negotiate, construct, and reconstruct a preferred and positive sense of self. Adopting a social constructionist perspective, individuals' agential role in constructing a positive and preferred sense of self has been highlighted (Bardon et al. 2016; Brown 2015; Thornborrow and Brown 2009). It is argued that wine producers actively choose, oppose and construct a variety of self-identities, which guide their behaviour (Thornborrow and Brown 2009) and influence their decisions to diversify into wine tourism.



In this instance, the findings revealed that wine producers actively position themselves along a continuum of wine producer identities, ranging from 'traditional' to 'entrepreneurial' (figure 16). At one end of the continuum, participants actively engage in identity work to construct their traditional, conventional, agricultural identities, while at the other end of the continuum, participants construct their preferred entrepreneurial identities and position themselves as entrepreneurial business owners. Wine producers draw on diversification discourses to construct their self-identities at the entrepreneurial end of the continuum. The findings chapter illustrated two contrasting vignettes, highlighting the differences between a typical traditional wine producer identity and a typical entrepreneurial identity (see section 5.4.1.). The first vignette (case 15) revealed how Elena engaged in identity work to actively position herself at the traditional end of the continuum. Her discourses showed her negative attitude and reluctance to pursue wine tourism diversification. By contrast, the second vignette (case 20) displayed how Paolo actively constructed an entrepreneurial identity and thus positioned himself, and his family, at the opposite end of the continuum. He revealed the family's intention and willingness to pursue wine tourism diversification activities. The following section will first discuss wine producers' identities situated at the 'traditional' end of the continuum before examining the more entrepreneurial/managerial identities, situated at the opposite end of the continuum.



**Figure 16 - Wine Producer Identities – Continuum**

### **6.5.1. Traditional Wine Producer Identities**

When constructing traditional, agricultural identities, wine producers want to be recognised as ‘real’ wine producers, focusing on their core winemaking activities, adopting an agricultural way of life and following the agrarian ideology very closely (Bryant 1999). Traditional wine producers’ discourses reveal a certain level of pride and pleasure in their work and in following in the footsteps of their ancestors. Wine producers are proud to be a part of the family business and to safeguard the winemaking tradition. They highly respect and follow family tradition and winemaking activities are at the core of self-image (Bryant 1999).

As the earlier review of the literature established, wine producers’ self-constructions are likely to be threatened by the turbulent and inconsistent environment and become destabilised (De Fina 2011; Sveningsson and Alvesson 2003). Adopting a social constructionist perspective it has been argued that individuals’ identities are uncertain, fluid, changeable and fractured (Alvesson 2010; Clarke et al. 2009) and thus are likely to result in tensions, conflicts and ambiguities (Watson 2008). The findings revealed changes and conflicts in wine producers’ identities after the diversification process. The vignette of Elena (case 15) presented in the findings chapter (section 5.4.1.) clearly demonstrated the continuous tensions and conflicts between social identities. Her predominant professional and family identities were conflicting with the host and/or entrepreneurial identities. She indicated that wine tourism diversification has a negative impact on her family/private life and her discourses revealed a certain work-family conflict, thus leading to an unfavourable attitude towards diversification. She expressed strong frustration with regards to wine tourism diversification and was unwilling to commit her entire self to being a host. Wine tourism activities were interfering with the family’s private life and thus, tourism diversification activities have been limited in order to avoid work-family conflicts. These identity conflicts will be further discussed in the following section.

### **6.5.1.1. Identity Conflicts**

Wine producers' engagement in wine tourism diversification activities does not only lead to changes in their self-constructions, but results in conflicting social identities. First of all, wine producers' discourses about wine tourism diversification display conflicts and tensions between their traditional, agricultural identities and the tourist host identities. Service work is depicted as fundamentally different from agricultural work, highlighting the likelihood of identity conflicts and tensions (Brandth and Haugen 2011). As the review of the literature established, tourism diversification activities have been predominantly adopted by farm families to create employment for family members, primarily for the women in the family. It could be argued that within an agricultural context, farmers are likely to perceive tourism diversification activities as service work, conflicting with their traditional, agricultural, masculine identities. It is generally assumed that women will take care of the tourism business, whereas men continue work on the farm (Hjalager 1996). With regards to this research, this assumption is only partially true. While in some family wineries, women are responsible for the tourism activities at the winery (e.g. case 2, 5, 6, 12, 23, 27), in other wineries, wine producers are willing to accommodate wine tourists and undertake winery tours and wine tastings (e.g. 7, 8, 17, 18, 22). In this instance, it could be argued that the gendering of work only partially accounts for the persistence of traditional identities on the part of wine producers.

Furthermore, constructing conventional, agricultural identities, some wine producers are unable to personalise the social role of tourist host, indicate a negative identity (Sveningsson and Alvesson 2003) and dis-identify with being a host. Participants actively position themselves as traditional wine producers and oppose the role of service provider. It has been argued that when encountering conflicts between wine producers' predominant agricultural identities and the tourist host identities, wine producers tend to display an unfavourable attitude towards wine tourism diversification.

Secondly, the findings revealed conflicts and tensions between wine producers' family identities and the tourist host identities. When constructing traditional agricultural identities, wine producers emphasise the importance and central role of the family in the winery. Traditional wine producers continuously experience work-family conflicts, that is, conflicts between their private life and wine tourism diversification activities.

Different types of work-family conflicts have been identified, notably time-based conflicts and strain-based conflicts (Greenhaus and Beutell 1985). Time-based conflicts occur due to the fact that wine tourism diversification entails increased workload for wine producers. The findings displayed that when diversifying into tourism, wine producers offer various wine-related activities to tourists (e.g. winery visits, wine tastings, cellar-door sales, B&B) and need to dedicate an increased amount of time to these activities. These various diversification activities are likely to interfere with and impact negatively on family life. Traditional wine producers display their willingness to dedicate more time to their families, hence prioritising family life through limiting or reducing the level of diversification (e.g. reducing winery's opening hours for tourists).

Strain-based conflicts are inextricably linked to time-based conflicts and indicate that the stress created by engaging in wine tourism diversification activities spills over into the family domain (Greenhaus and Beutell 1985; Jennings and McDougald 2007). Due to the increased workload and the continuous interaction with tourists, wine producers are likely to develop strain symptoms such as stress, tension, anxiety, pressure, fatigue, apathy, and irritability (Greenhaus and Beutell 1985), which impacts negatively on their private/family life.

Accordingly, it has been argued that wine producers' engagement in wine tourism diversification activities leads to various conflicts and tensions and is likely to threaten their conventional identities (Brandth and Haugen 2011). As a response to these changes, conflicts and tensions from wine tourism diversification, wine producers increasingly engage in identity work. The

findings revealed that wine producers engage in different types of identity work, notably aspirational, narrative and differentiating identity work, to negotiate, construct and reconstruct a strong and coherent sense of self, influencing their decisions to wine tourism diversification. In the following, these different types of identity work will be discussed in constructing traditional wine producer identities.

#### **6.5.1.2. Identity Work**

In order to construct conventional agricultural identities, wine producers actively engage with diversification as a resource for identity work. The findings revealed different types of identity work, notably aspirational, differentiating and narrative identity work.

##### **Aspirational Identity Work**

When discussing wine tourism diversification, wine producers engage in aspirational identity work to construct a strong traditional sense of self and position themselves as conventional wine producers. Through engaging in aspirational identity work traditional wine producers aspire to be recognisable, high-quality wine producers. They desire to be recognised as ‘real’, ‘authentic’ wine producers.

Traditional wine producers do not consider wine tourism diversification to be a viable option and prefer to concentrate on and prioritise their core winemaking activities. The findings revealed that certain wine producers continuously pursue a desirable identity, notably that of the highest quality wine producer and recognise wine tourism diversification to be interfering with their preferred and desired self-constructions. As was illustrated in the findings chapter (see table 10) the wine producers in case 8 and 27 engaged in aspirational identity work to construct traditional, agricultural identities. The discourses revealed their constant challenge and determination to produce ‘*the highest quality wine*’ as well as ‘*something that is unique*’. In this instance, it could be argued

that participants engage in aspirational identity work to actively position themselves as traditional wine producers, constructing conventional agricultural identities.

Furthermore, achieving a desired/aspired sense of self is inextricably linked to the process of differentiation. It has been argued that when constructing their traditional identities, wine producers simultaneously distance themselves from 'the other', emphasising their superiority over 'the other'.

### **Differentiating Identity Work**

Wine producers engage in discourses of similarities and differences (Ybema et al. 2009) to construct and reconstruct coherent traditional identities. In this instance, wine producers try to answer the question '*who am I?*' through engaging in 'self-other talk' and getting an understanding of '*who I am not*' (Ybema et al. 2009). When positioning themselves as traditional wine producers, participants distance themselves both from tourists and local entrepreneurial wine producers. Their discourses depict tourists and entrepreneurial wine producers as 'the other'.

First of all, traditional wine producers engage in the process of 'othering' (Ybema et al. 2012) and/or 'defensive othering' (McInnes and Corlett 2012) to position themselves apart from local entrepreneurial wine producers. They reinforce their own self-constructions through referring to entrepreneurial wine producers as unreasonable and incompetent (McInnes and Corlett 2012). Entrepreneurial wine producers, engaging and pursuing wine tourism diversification are perceived as inferior and producing lower-quality wine, due to the fact that diversification interferes with and distracts them from the core winemaking activities.

Secondly, traditional wine producers engage in differentiating identity work to distance and position themselves apart from tourists, highlighting their superiority and elitism (Thornborrow and Brown 2009). Following this line of

thinking, it has been argued that the engagement in wine tourism diversification and the continuous interaction with tourists is likely to threaten wine producers' conventional, agricultural identities. They actively engage in the discursive separation of the self from the other to determine and legitimate dominant power relationships (Ybema et al. 2009), as will be elaborated below.

Wine producers' discourses reveal the agent-target power relationship, where tourists are referred to as targets and wine producers see themselves as agents (Cheong and Miller 2000). Wine producers engage in differentiating identity work to distance themselves from targets and position themselves as superior. They position tourists as subordinate actors in their discourses and are able to exercise power over tourists by continuously gazing at them and deciding on what can and cannot be seen and experienced by tourists. During winery visits and wine tastings for example, wine producers use control mechanisms, such as direct surveillance and observation primarily to gain knowledge over tourists (Foucault 1977), such as wine producers' increased knowledge of different wine consumers' tastes and preferences. Acquiring increased knowledge over tourists is believed to predict, manage and control their behaviours (Townley 1993). Accordingly, when engaging in talk about wine tourism diversification, wine producers construct a strong traditional sense of self, differentiating themselves from tourists and legitimating the dominant power relationships.

### **Narrative Identity Work**

As the earlier review of the literature established, self-identities are constructed through individuals' engagement with narratives (Thornborrow and Brown 2009; Alvesson and Robertson 2015). It has been argued that particularly in times of changes, notably occupational changes, narrative identity work enables individuals to maintain a strong and coherent sense of self (Brandth and Haugen 2011; Ibarra and Barbulescu 2010). Wine tourism diversification requires wine producers to occupy new roles and as a result

demand a change in behaviour, attitude and skills (Ibarra and Barbulescu 2010). These changes are likely to threaten wine producers' conventional identities, place identities and their desired sense of continuity.

The findings revealed that in order to limit identity threats, wine producers actively engage in narrative identity work. Wine producers continuously narrate stories about their lives, their families, their place attachment, the past and the winemaking traditions to highlight their commitment to and respect for the winemaking profession and simultaneously construct strong traditional identities. Stories about ancestors' continuous struggle towards producing high-quality wines and their achievements and accomplishments are particularly evident in wine producers' discourses. It has been argued that wine producers recount these stories to sustain feelings of legitimacy and authenticity (Brandth and Haugen 2011). In this instance, participants engage in narrative identity work to position themselves as traditional, conventional wine producers and construct coherent and harmonious self-identities (Brandth and Haugen 2011).

This section notes that wine tourism diversification is likely to threaten wine producers' conventional self-constructions. They are increasingly preoccupied with identity and consequently are more likely to thoroughly engage in identity work (Brown 2015; Alvesson and Robertson 2015). This situation was particularly evident in vignette 2, illustrating a typical traditional wine producer identity (section 5.4.1.1.). Elena's (case 15) discourses revealed a number of tensions and conflicts between her professional agricultural identities and the host identities. Pursuing wine tourism diversification threatened her conventional wine producer identity, due to the fact that tourism activities require a considerable amount of time and are likely to interfere with being a professional wine producer. The vignette revealed that she thoroughly engaged in identity work to highlight her priority for the winemaking profession and be recognised as a high-quality wine producer, rather than an accommodation provider. Consequently, the findings chapter revealed that wine producers engage in aspirational, narrative and differentiating identity work to actively position themselves as conventional/traditional wine



producers, while simultaneously highlighting their reluctance to pursue wine tourism diversification.

However, irrespective of negotiating, constructing and reconstructing traditional identities, the previous review of the literature demonstrated that individuals' engagement in diversification activities is likely to result in identity changes and the adoption/creation of diverse identities (Brandth and Haugen 2011). It is assumed that unconventional and/or 'detraditional' (Bryant 1999) identities are increasingly constructed, whereas conventional agricultural identities have weakened after the diversification process (Vesala and Vesala 2010; Burton 2004). With regards to this research, this assumption is only partially true. On the one hand, it could be argued that wine tourism diversification strengthens wine producers' traditional identities. They are proud to show tourists their work and share family stories and the family's winemaking tradition with tourists. In this instance wine producers engage in wine tourism diversification to confirm their status of traditional, high-quality wine producer. On the other hand, the previous assumption within the literature holds true in relation to this thesis, as certain wine producers actively engage in constructing entrepreneurial identities. In this instance, traditional agricultural identities might only be considered of minor importance. Accordingly, the following section will examine wine producers' unconventional entrepreneurial identities, situated at the opposite end of the continuum.

### **6.5.2. Entrepreneurial Wine Producer Identities**

This section discusses wine producers' active engagement in identity work in negotiating and constructing unconventional entrepreneurial identities. When constructing entrepreneurial identities, wine producers want to be recognised as managers and business owners, rather than conventional wine producers. In this instance, traditional agricultural identities are only considered of minor importance. Wine producers adapt to the changes and trends in the external environment and pursue entrepreneurial opportunities, thus, highlighting their

willingness to engage in wine tourism diversification. While they respect and acknowledge the family tradition, they recognise the need to innovate and drive the family winery forward.

Furthermore, wine producers not only position themselves as entrepreneurial, but their discourses also highlight the family's entrepreneurial mind-set. The findings revealed that wine producers depict family members as 'pioneers', 'entrepreneurs' and 'innovators', scanning the external environment and pursuing entrepreneurial opportunities, such as wine tourism diversification. Families that have engaged in wine tourism diversification have done so to actively position themselves as 'entrepreneurs', constructing unconventional identities and thereby achieving a strong and positive sense of self.

While the previous section has established that wine tourism diversification threatens traditional wine producers' self-constructions, this section emphasises that diversification strengthens and reinforces wine producers' unconventional entrepreneurial identities. Wine producers actively engage in identity work to construct their entrepreneurial identities. Different types of identity work have been revealed, notably differentiating, aspirational, and personalising identity work.

### **Aspirational Identity Work**

When discussing wine tourism diversification, wine producers engage in aspirational identity work to construct a positive sense of self and position themselves as unconventional wine producers. While traditional wine producers aspire to be recognised as high-quality wine producers, entrepreneurial wine producers aspire to be successful entrepreneurs and business owners. The discourses revealed their willingness to diversify into tourism, aiming to develop and invest in additional activities and attract an increasing number of tourists.

However when engaging in aspirational identity work, wine producers also highlight their continuous struggle to dedicate enough time to both activities, notably winemaking and wine tourism diversification. While continuously pursuing a desirable identity, entrepreneurial wine producers perceive wine tourism diversification to be an effective and powerful means towards 'achieving' their desired sense of self.

### **Differentiating Identity Work**

While section 6.5.1.2 delineated the fact that traditional wine producers engage in differentiating identity work to distance themselves from entrepreneurial wine producers, highlighting their superiority through focusing on and prioritising winemaking activities, this section reveals that entrepreneurial wine producers engage in differentiating identity work to distance themselves from traditional wine producers, highlighting their superiority through investing in and offering a variety of tourism activities. In this instance, wine producers engage in differentiating identity work to position themselves as entrepreneurs. They construct their unconventional entrepreneurial identities through distancing themselves from the local winemaking community, which is depicted as traditional and narrow-minded, not recognising the benefits of wine tourism diversification.

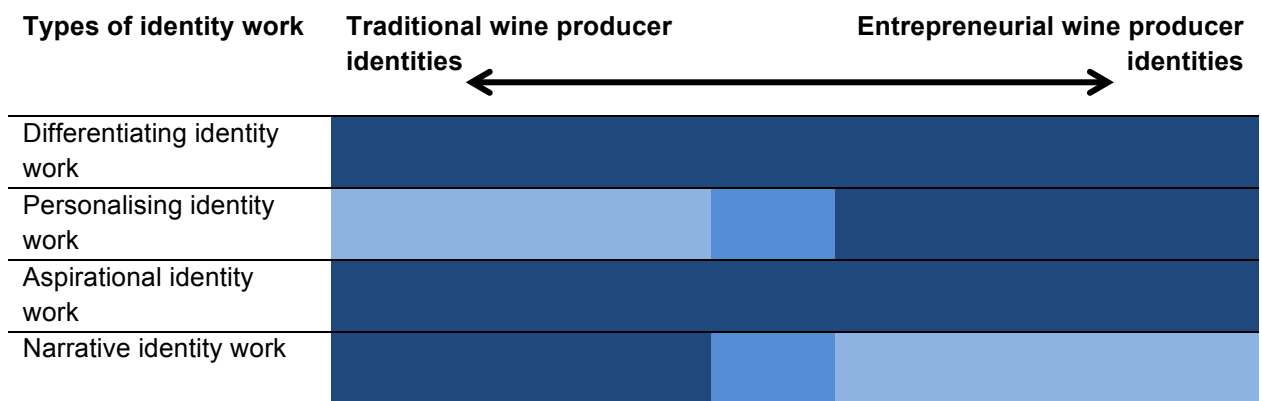
The findings revealed entrepreneurial wine producers' engagement in differentiating identity work, describing other local wine producers as having the 'wrong' attitude to diversify into wine tourism, wanting to keep their winemaking process secret. Differentiating themselves from the local wine-producing community enables them to construct a positive and preferred sense of self, highlighting their willingness to pursue wine tourism diversification. Closely linked to differentiating identity work, entrepreneurial wine producers engage in personalising identity work to highlight their distinctiveness.

## **Personalising Identity Work**

Wine producers engage in personalising identity work to construct an identity independent from the local wine-producing community in order to achieve a sense of individuality. It could be argued that while traditional wine producers aim to 'fit in' with the local wine-producing community, entrepreneurial wine producers strive for independence and distinctiveness. In this instance, entrepreneurial wine producers engage in personalising identity work to challenge and oppose the social norms set by the local wine producing community (Stenholm and Hytti 2014).

Wine tourism diversification is perceived as a means of standing out and constructing an autonomous and independent sense of self (Huber and Brown 2016). Investing in the construction/development of an agritourism business and/or a restaurant is considered one way of standing out and positioning oneself as an entrepreneurial wine producer. Consequently, personalising and differentiating identity work are inextricably connected, as wine producers can only achieve an individuated sense of self through distancing and differentiating themselves from others, notably the local wine-producing community.

This section has examined the identity layer of the conceptual framework and revealed wine producers' active engagement in identity work to construct a strong coherent sense of self and position themselves along the continuum of wine producer identities. Diversification is identified as a key resource for identity work to construct a positive sense of self. While some wine producers position themselves on the 'traditional' end of the continuum, others construct unconventional, entrepreneurial identities and position themselves at the opposite end of the continuum. The analysis and interpretation of wine producers' discourses revealed that they engage in four types of identity work to construct a positive sense of self, notably differentiating, personalising, aspirational and narrative identity work (table 14).



**Table 14 - Types of Identity work**

The colours used in the table indicate the intensity of identity work evident when positioning themselves on the wine producer identity continuum (colours ranging from light blue = limited engagement in identity work to dark blue = predominant engagement in identity work). The findings revealed that participants engage in differentiating and aspirational identity work to both construct traditional agricultural identities as well as entrepreneurial identities. In this instance, wine producers participate in aspirational and differentiating identity work to highlight both their willingness and reluctance to pursue wine tourism diversification. However table 14 also indicates that participants predominantly engage in personalising identity work to construct entrepreneurial wine producer identities, while traditional identities are constructed through wine producers' active engagement in narrative identity work. On the one hand wine producers particularly engage in narrative identity work to construct coherent, authentic, and conventional self-identities. When constructing these traditional identities, wine producers underline their reluctance to engage in and pursue wine tourism diversification. On the other hand, wine producers engage in personalising identity work to construct distinctive, unique, and autonomous self-identities. These entrepreneurial identities are constructed to highlight wine producers' willingness to engage in wine tourism diversification. Consequently, it could be argued that wine producers' self-constructions are likely to influence their behaviour and decision-making process, thus impacting wine tourism diversification decisions.

As the earlier review of the literature established, identity formation is a complex interplay between individual's identity work and identity regulation. While identity work constitutes the third layer of the conceptual framework, referring to the semi-conscious motives for wine tourism diversification, this thesis argues that identity regulation represents the deepest layer of the conceptual framework, revealing the unconscious motives underlying family wineries' wine tourism diversification decisions

## **6.6. Power Layer**

After having discussed the socioeconomic, family and identity layers of the conceptual framework explaining family wineries' motives for wine tourism diversification, this section turns attention to the deepest layer of the conceptual framework, that is, the power layer, to reveal the unconscious motives underlying wine tourism diversification decisions. Previous research predominantly focused on the identity layer by highlighting individuals' agential role in constructing their identities. The power layer, referring to the discursive forces shaping individuals' identities, has only received limited attention with regards to diversification motives and decisions (Stenholm and Hytti 2014). The power layer emphasises that social/cultural forces and practices shape and regulate wine producers' identities and thus influence their behaviour and decision-making process.

As the earlier review of the literature revealed, individuals' self-constructions are shaped and influenced by dominant social and business discourses and practices (Kuhn 2006; Gotsi et al. 2010) about how individuals should behave, speak, act and think (McKenna 2010). As a result, these societal and organisational discourses constrain individuals from constructing their preferred self-identities and produce 'disciplined selves' (Collinson 2003). This section will discuss the discursive forces shaping wine producers' self-constructions, notably the local wine-producing community, talk about family and wine producers' own perception of the winemaking profession.

### **6.6.1. Local wine-producing Community**

Within an agricultural/rural setting, the local community has been identified as an informal institutional force influencing and regulating individuals' identity constructions (Stenholm and Hytti 2014). Social pressures prevail within rural areas, exercising disciplinary power over individuals not to be better or different than others or stand out (Lordkipanidze et al. 2005). In this instance, it could be argued that these social pressures "press upon what should be said" (McInnes and Corlett 2012, p.33).

The social norms and values set by the local wine-producing community can be seen as informal control systems or symbolic means "through which a society expresses its collective world view" (Ansari and Bell 1991, p.8-9). It has been argued that rural communities generally develop a strong place attachment, display their reluctance to change and therefore tend to perceive diversification as a distraction and interference with the main farming activities. There is a common belief within European wine-producing countries, that wine producers should primarily focus on the winemaking process, rather than concentrating on other, non-agricultural activities (Charters 2012). Italy and the Langhe area are no exception. The local wine-producing community appears to assume that wine producers have to adopt a certain lifestyle where the winemaking profession directs/regulates their daily lives.

Wine tourism diversification is perceived to interfere with wine producers' core activity and distract them from focusing on the wine production and on producing high-quality wines. Particularly the construction/development of an agritourism business (B&B) as a wine tourism diversification activity has been identified as distracting wine producers from their core winemaking activities. Diversified wine producers are thus considered to be 'low-quality' wine producers. The underlying assumption is that high-quality wine producers focus on the core winemaking activities, keep their wineries closed to the public/tourists, keep their winemaking process secret and sell their wines predominantly to professionals, such as importers and restaurants. In this

instance, the social norms set by the wine-producing community are likely to constrain who wine producers are, thus limiting their subjectivity.

Wine producers display predominantly traditional, conventional identities in order to preserve their social status within the local wine-producing community. Conventional wine producers are depicted as 'real', 'more believable', and 'high-quality' wine producers. They aim for recognition and acceptance within society (Burton 2004). In order to secure legitimacy for the family winery and their conventional agricultural identities (Stenholm and Hytti 2014), wine producers' discourses reveal their reluctance to pursue wine tourism diversification.

However, while the social norms set by the wine-producing community act as institutional forces for identity regulation, the findings also revealed that certain wine producers actively engage in identity work to challenge these institutional forces through opposing social norms and values (Stenholm and Hytti 2014). In this instance, wine producers construct unconventional identities and position themselves as entrepreneurs, highlighting their willingness to engage in wine tourism diversification. After having examined the influence of the local wine-producing community on shaping and regulating wine producers' self-constructions, the discussion turns to examining wine producers' talk about their families as a discursive force shaping their identities.

### **6.6.2. Talk about Family**

The findings revealed that discourses about the family both discipline and are a key resource for identity work (Brown and Lewis 2011). The identity layer of the conceptual framework revealed that wine producers actively engage in narrative identity work to construct a positive sense of self. It has been argued that wine producers narrate stories about their family, tradition and the family history in order to construct traditional, coherent and authentic self-identities (Brandth and Haugen 2011).



However, it is important to note that talk about the family, tradition and family history also acts as a regulating force for identity formation. As the previous review of the literature established, when constructing their identities, individuals' "choices" are made within frameworks of disciplinary power", constraining "their scope for discursive manoeuvre" (Thornborrow and Brown 2009, p.356). In this instance, it could be argued that families establish these frameworks for disciplinary power, where wine producers' choices have to be made within these frameworks, thus restricting their subjectivities.

Talk about the family (e.g. family stories) exercises disciplinary power over wine producers. "[D]isciplinary powers are concerned with the creation of obedient bodies and are fixed through the discursive practices which constitute them" (Thornborrow and Brown 2009, p.358). In this instance, disciplinary powers reside in talk about the family, tradition and history. Stories about their lives, family and history discipline wine producers' identity work. Wine producers accounts reveal various stories about the family tradition and history. These stories illustrate for example ancestors' success stories and the sacrifices they made to drive the family business forward; stories about how the business has been passed down over numerous generations; the contribution of each generation to the success of the family business; as well as the family's secret winemaking traditions and processes.

From a young age, children accompany their parents to the vineyards, listening to these stories about the family, tradition and past generations. It could be argued that these stories have as a result to exercise disciplinary powers, shape wine producers' self-constructions, influence them to follow in the footsteps of their ancestors and continue the family tradition. Wine producers might perceive it as their responsibility and obligation to adhere to the family tradition. In this instance, the family can be described "as an intricate storytelling network in which were traded accounts" of what it means to be a 'dedicated' family member in a traditional family-owned and managed winery (Thornborrow and Brown 2009, p.368). Talk about the family exercises power over wine producers "in order to maintain him (e.g. *the wine producer*) in his individual features, in his particular evolution, in his own aptitudes or

abilities, under the gaze of a permanent corpus of knowledge” (Foucault 1977, p.190), thus controlling and regulating his/her behaviour (Hewege 2012).

Consequently, it has been argued that on the one hand, wine producers narrate stories about the family to actively construct a positive sense of self, while on the other hand, these same stories have the power to discipline and regulate their self-identities. The following section will examine wine producers’ own perception of the winemaking profession as a discursive force regulating their self-constructions.

### **6.6.3. Perception of the Winemaking Profession**

The findings revealed that wine producers’ own perception of the winemaking profession disciplines their identity work and shapes their self-identities. Wine producers’ discourses reveal their perceptions of what it means to be a ‘real’ wine producer, adopting an agrarian ideology and outlining the importance of embracing an ‘appropriate’ agricultural lifestyle. They highlight their emotional attachment to place, the passion for the work in the vineyards and the importance of following the winemaking tradition. In this instance, it is believed that wine tourism diversification interferes with being a professional wine producer and business decisions are taken in the light of the winemaking profession.

It could be argued that engaging in identity work, wine producers are being self-disciplining in that their own perception about the winemaking profession disciplines their identity work. In this instance, identity work becomes identity regulation. Accordingly, wine producers’ own perception of the winemaking profession constrains them to speak from a particular position (McInnes and Corlett 2012). They engage in performative identity work, which regulates and shapes their self-identities. It could be argued that wine producers “felt under an obligation to enact a particular identity” (e.g. traditional, conventional agricultural identity) due to individual pressures, that is, their perception of the winemaking profession (McInnes and Corlett 2012, p.32).

Similarly, as previously discussed in the literature review chapter, from a Lacanian psychoanalytical perspective it is believed that individuals “are fundamentally divided between who they consciously think they are and who they are as subjects of the unconscious” (Driver 2017, p.4). Through engaging in discourse, wine producers consciously construct who they think they are, although their construction of the self is seen as an imaginary construction (Driver 2009a; 2009b; 2010). In this instance, it could be argued that wine tourism diversification “furnishes discursive resources for the narrative construction of an imaginary self” (Driver 2017, p.15). It is an imaginary self, due to the fact that identities constructed in the imaginary order are constrained by the symbolic order (Driver 2010). Due to this constraint, individuals experience fundamental lack, which is caused by the “impossibility of knowing and fulfilling what is unconsciously desired” (Driver 2017, p.15). When wine producers engage in the construction of traditional or entrepreneurial identities, it is only an imaginary construction and the illusion that the self can be rendered complete. These imaginary constructions fail as they are continuously undermined by unconscious desires.

Consequently, this section has examined the deepest layer of the conceptual framework, notably the power layer, referring to the unconscious motives underlying wine producers’ decisions to diversify into wine tourism. It is argued that while the identity layer denotes wine producers’ active engagement in identity work to construct a positive and desired sense of self, the power layer indicates various regulating forces shaping wine producers’ identities. These institutional/discursive forces (e.g. local wine-producing community, talk about the family and wine producers’ perception of the winemaking profession) shape wine producers’ self-constructions and as a result influence their behaviour and decision-making and thus impact wine tourism diversification decisions.

## 6.7. Chapter Summary

As this thesis set out to examine the motives underlying family wineries' decisions to diversify into wine tourism, a multi-layered approach was adopted and a conceptual framework was developed in order to gain a deeper understanding of the motives/motivations for wine tourism diversification. It has been argued that the socioeconomic and family layers refer to family wineries' conscious motives for diversification. Both social and economic motives have been identified in wine producers' discourses. While it has been argued that for some family wineries, social and/or economic reasons/motivations might be the only motives for engaging in wine tourism diversification, the findings of this case study revealed multiple reasons/motives for diversification, notably semi-conscious and unconscious motives. The conscious motives for diversification have received considerable attention within the agricultural and family business literatures, whereas semi-conscious and unconscious motives, constituting the deeper layers of the conceptual framework, have only received limited attention.

This thesis argues that the identity layer and the power layer are able to provide a deeper understanding of the motives underlying family wineries' diversification decisions. Talk about diversification triggers identity work and engages wine producers to construct a positive and coherent sense of self. Wine producers actively engage in different types of identity work to position themselves along a continuum of wine producer identities, ranging from traditional to entrepreneurial identities. While the identity layer reveals wine producers' agential role in identity formation, the deepest layer of the conceptual framework highlights the powerful discursive/institutional forces shaping and regulating wine producers' self-constructions. It is argued that wine producers' self-constructions influence their behaviour and decision-making and thus impact wine tourism diversification decisions.

Consequently, when constructing traditional, conventional wine producer identities, participants highlight their reluctance to pursue wine tourism diversification. They display a strong emotional attachment to the winemaking profession as well as to the family tradition and history. Wine tourism diversification is perceived to threaten conventional wine producer identities. Entrepreneurial wine producers by contrast highlight their willingness to engage in wine tourism diversification. They actively position themselves towards the entrepreneurial end of the continuum, want to be recognised as business owners and consider wine tourism diversification to be a powerful means of constructing and strengthening their independent and autonomous self-constructions. However it is important to note that the majority of participating wine producers can be located somewhere along the continuum, rather than at the extremes.

The following chapter will bring this thesis to a conclusion through emphasising the main empirical contributions, as well as the theoretical and methodological implications and contributions of this thesis. Finally, this conclusion chapter will also offer various directions for further research.

## **7. Chapter VII – Conclusion Chapter**

### **7.1. Introduction**

This thesis has examined the motives underlying family wineries' decisions to diversify into wine tourism. A number of themes have been addressed and discussed in order to achieve the aim and objectives of this thesis, notably diversification, motivations for diversification, family businesses' preservation of socioemotional wealth, identity formation, identity work and identity regulation. The aim of this thesis derived from the principal debates within the agricultural and family business literatures regarding farmers' and family members' motivations for diversification. Both literatures have predominantly focused on the economic-social dichotomy in explaining family businesses' motives for diversification. This thesis extends current understandings and debates by providing new insights into family businesses' diversification decisions and motivations through adopting a multi-layered approach and developing a conceptual framework. The layered approach provides a more encompassing explanation of family wineries' wine tourism diversification decisions.

First of all, this chapter will highlight the main empirical contributions in relation to the research aim and objectives of this thesis, followed by a discussion of the theoretical, methodological and practical implications and contributions of the findings in deepening current understandings of family businesses' motives for diversification. The final section of this chapter outlines potential limitations of this thesis and offers various directions for further research.

## **7.2. Empirical Contributions**

In order to achieve the aim and objectives of this thesis, a number of research themes have emerged and have been addressed throughout the thesis, notably diversification, motivations for diversification, family businesses' socioemotional wealth, and identity formation. The literature review chapter examined these core themes drawing on the current debates prevalent within the literature. The main empirical findings were presented and analysed in chapter V (findings chapter), while chapter VI (discussion chapter) synthesised the discussions presented in previous chapters to address the research aim of this thesis. The following section will discuss the main empirical contributions of this thesis in relation to family wineries' motivations/decisions to wine tourism diversification.

### **7.2.1. Motivations for Diversification**

Whereas the prevailing view of business diversification is that the process is driven by economic motives, this thesis has established that the picture is considerably more complex, arguing that family wineries' diversification decisions are driven by both economic, social and psychological motivations. While certain wine producers predominantly highlight their financial/economic motives for wine tourism diversification, others reveal the importance of social/nonfinancial motives. Economic motives for wine tourism diversification have emerged from wine producers' accounts and include the generation of additional income and the importance of direct sales and direct payments at the winery. When offering cellar door sales, wine producers are able to sell their wines at higher prices at the winery than they would to distributors, importers and/or restaurants. Cellar door sales result in direct payments, as private clients/tourists pay directly at the winery at the time of purchase.

However differences have been revealed between small and medium-sized family wineries in relation to their diversification motives. On the one hand it has been argued that particularly small family wineries recognise wine tourism diversification as a beneficial strategy for increasing their revenue and direct sales. Many small-scale family wineries do not have the necessary finances to promote their wines on an international basis, and their production levels are too small to attract major wine distributors. In this instance, wine tourism diversification activities (e.g. winery visits, wine tastings, cellar door sales, B&B) allow small family wineries to increase their income. On the other hand, the findings revealed that especially medium and large-sized family wineries are financially stable, due to their high export level, and their decisions to diversification are not primarily financially driven. As the findings chapter revealed, some family wineries' export levels can reach up to 85%, meaning that wine tourism diversification is not identified as a necessity to generate additional income. Consequently these family wineries display predominantly social motivations for diversification. In this instance, wine tourism diversification is seen as a means for building relationships and interacting with consumers, receiving direct feedback on the quality of their wines, and sharing the family history, ancestors' success stories as well as the family's winemaking tradition with tourists. However, the findings and discussion chapters revealed that these social motivations could be interpreted as indirect economic motives for diversification; hence the need for a deeper and more nuanced understanding of wine producers' motivations for diversification. It has been argued that some wine producers' accounts display a combination of social and economic motives for diversification, highlighting the complex interplay and inseparability of these motives. Although wine producers initially display social motives for engaging in wine tourism diversification, these motives are inextricably linked to economic benefits for family wineries. While wine producers' initial motivations might have been socially driven, they are aware of the fact that diversifying into tourism is likely to result in an increased visibility for the winery, increased brand awareness, growing levels of wine consumption, higher demands at the international level and ultimately increased wine export opportunities.



Consequently the empirical findings on motivations for diversification have revealed that wine producers are driven by a complex combination of both social and economic motives. Furthermore, in line with the discussion on social motivations for diversification, another major theme has emerged from the inductive analysis of the data and links to the context of family businesses, notably the socioemotional wealth (SEW) concept. Family businesses' preservation of SEW constitutes the second research theme of this thesis and will be discussed in the following section.

### **7.2.2. Socioemotional Wealth**

Linked to the social motivations for diversification, the family business literature highlights the fact that family businesses' decisions (e.g. wine tourism diversification decisions) are predominantly driven by the importance of preserving their socioemotional wealth. The findings chapter established that the SEW dimensions of family control, family tradition, employment of family members and transgenerational sustainability emerged from wine producers' accounts as important social motivations for diversification.

It has been argued that wine producers' decisions to diversify into wine tourism are driven by the need to keep family control. Wine producers' accounts revealed their reluctance to hire nonfamily employees and delegate authority. Furthermore, current owners express their desire to engage in wine tourism diversification through investing in the construction of wine tasting facilities, B&Bs and restaurants in order to employ family members. In this instance, diversification is seen as a beneficial strategy to offer the subsequent generation distinct areas of responsibilities within the business, thus guaranteeing transgenerational sustainability. Similarly, wine producers' accounts reveal that their engagement in wine tourism diversification is motivated by the importance of keeping the family tradition. Including the subsequent generation into the family business will safeguard the family tradition.

Consequently, in relation to the second research theme of this thesis, the analysis and interpretation of the data revealed that family wineries' motivations/decisions to diversify are context-dependent. Whereas the prevailing view of business diversification adopts a rational, decontextualized profit-maximisation approach and does not consider the context of family businesses, context played a major role throughout this thesis and it has been argued that the social, historical, geographical, and family context is likely to influence family businesses' diversification decisions.

While this thesis sets out to examine the motives underlying family wineries' decisions to diversify into wine tourism, the economic-social dichotomy seemed unable to render a totally convincing explanation of the data. This is not to say that economic motivations were unimportant, but the interpretation of the empirical findings revealed multiple and sometimes contradictory reasons/motives (e.g. semi-conscious and unconscious motives) for diversifying into wine tourism. The application of DA techniques in interpreting the data revealed the frequent incidence of talk about coherence, commitment, differentiation/distinctiveness, and wine producers' desired self, therefore suggesting the interpretive utility of identity theorising in fully understanding wine tourism diversification decisions and motivations. Discourses about wine tourism diversification were drawn upon to construct a distinctive, coherent and desired sense of self, which in turn influences their decisions to wine tourism diversification. The following section will thus turn attention to another core theme of this thesis, notably identity formation, highlighting the complex interplay between identity work and identity regulation in constructing wine producers' self-identities.

### **7.2.3. Identity Formation**

Identities have been conceptualised as “the meanings that people attach reflexively to themselves in response to questions such as ‘who am I?’ and ‘who do I want to be in the future?’” (Brown and Coupland 2015, p.1316). It has been argued that the focus on identity advances and deepens the understanding of family businesses’ motivations and decisions to diversification. Chapter II (Literature Review Chapter) examined one of the central debates within the literature on identity, relating to the extent to which individuals are free and autonomous to choose their identities (identity work) or whether individuals’ identities are constrained by dominant and societal discourses (identity regulation) (McInnes and Corlett 2012).

On the one hand, wine producers, having a degree of agency, actively engage in identity work to negotiate, construct, and reconstruct a preferred and positive sense of self. On the other hand, identity regulation relates to the social/cultural forces and practices shaping and regulating wine producers’ identities and thus influencing their behaviour and decision-making process. The following section will first of all discuss the notion of identity work in relation to the empirical findings, before turning attention to the social forces regulating wine producers’ identities.

### **7.2.4. Identity Work**

The analysis and interpretation of the empirical findings revealed that wine tourism diversification triggers wine producers’ identity work. In the discussion chapter it was illustrated that their decisions to diversify into wine tourism are driven by their desire to construct a positive sense of self. It is argued that wine producers actively choose, oppose and construct a variety of self-identities, which guide their behaviour (Thornborrow and Brown 2009) and influence their decisions to diversify into wine tourism. The interpretation of the empirical findings revealed that when constructing their self-identities, wine producers position themselves on the identity continuum, ranging from

'traditional' to 'entrepreneurial' wine producer identities. They draw upon discursive resources (e.g. family, entrepreneurship, occupation, generational differences) and engage in various types of identity work, notably differentiating, aspirational, narrative, personalising identity work, to construct a positive sense of self and position themselves along the continuum.

Traditional wine producers actively engage in differentiating, aspirational and narrative identity work to construct traditional/conventional identities in order to be recognised as 'real' wine producers, focusing on their core winemaking activities, adopting an agricultural way of life and following the agrarian ideology very closely (Bryant 1999). In this instance, wine producers reveal their reluctance to pursue wine tourism diversification. By contrast, when constructing entrepreneurial identities, wine producers want to be recognised as managers and business owners, rather than conventional wine producers. In this instance, traditional agricultural identities are only considered of minor importance. Wine producers are more likely to adapt to the changes and trends in the external environment and pursue entrepreneurial opportunities, thus, highlighting their willingness to engage in wine tourism diversification.

#### **7.2.5. Identity Regulation**

While wine producers actively engage in identity work to construct a positive sense of self, their identity work is simultaneously disciplined by regulating discursive forces. These discursive forces constrain individuals from constructing their preferred self-identities and produce 'disciplined selves' (Collinson 2003). The interpretation and analysis of the empirical findings revealed that talk about the family, the social norms set by the local wine-producing community, as well as wine producers' own perception of the winemaking profession shape their self-constructions.

First, stories about their lives, the family, tradition and history exercise disciplinary power over wine producers and discipline their identity work. These narrated life-stories are likely to restrain wine producers from constructing entrepreneurial, un-conventional identities, as they adhere to the family norms, tradition and values. Wine producers might perceive it as their responsibility and obligation to follow the family tradition.

Second, the social norms and values set by the local wine-producing community are recognised as informal control systems (Ansari and Bell 1991) and/or institutional forces influencing and regulating individuals' identity constructions (Stenholm and Hytti 2014). The local wine-producing community appears to assume that wine producers have to adopt a certain lifestyle where the winemaking profession directs and regulates their daily lives. The underlying assumption is that high-quality wine producers focus on the core winemaking activities rather than engage in wine tourism diversification. While certain wine producers display predominantly traditional, conventional identities in order to preserve their social status within the local wine-producing community, others actively engage in identity work to construct unconventional/entrepreneurial identities and challenge the agrarian mentality adopted by the local wine producers. These entrepreneurial wine producers highlight their engagement in wine tourism diversification.

Furthermore, the analysis and interpretation of the empirical findings revealed that wine producers' own perception of the winemaking profession disciplines their identity work and shapes their self-identities. Wine producers' discourses revealed their perceptions of what it means to be a 'real' wine producer. They highlight their emotional attachment to place, the passion for the work in the vineyards and the importance of following the winemaking tradition. In this instance, wine tourism diversification interferes with being a professional wine producer and business decisions are taken in the light of the winemaking profession. Consequently, the findings chapter highlighted that wine producers' identity formation constitutes a complex interplay between agency and structure, guiding their behaviour and influencing their decisions. When constructing entrepreneurial identities, wine producers actively challenge the

agrarian mentality and the social norms set by the local wine-producing community. In this instance, wine producers have a high degree of agency and actively work on constructing their desired sense of self. They highlight their willingness to pursue wine tourism diversification. By contrast, when constructing traditional identities, wine producers have a lower degree of agency and cultural/historical structures guide their behaviour and decision-making process. The findings chapter revealed that talk about the family, the agrarian mentality and wine producers' own perception of the winemaking profession discipline their identity work and constrain them from constructing unconventional, entrepreneurial identities. They highlight their unwillingness/reluctance to pursue wine tourism diversification.

This section has examined the core research themes of this thesis in relation to the empirical findings, notably motivations for diversification, family businesses' preservation of their socioemotional wealth, identity formation, identity work, and identity regulation. The following section will discuss the theoretical, methodological and practical implications of these findings.

### **7.3. Theoretical Contributions**

This study has theoretical implications for the understanding of how diversification decisions are influenced by individuals' self-constructions. The findings provide new insights into the motives underlying family businesses' diversification decisions through adopting a layered approach and contribute to the tourism, agricultural and family business literatures in a number of ways, which will be outlined below.

Within the agricultural literature, the discussions on motivations for diversification have been based primarily on the economic-social dichotomy in explaining farmers' motivations for diversification. It is assumed that farmers' motivations to diversify their farm business are mainly economic in nature. Only a limited number of researchers revealed farmers' social motivations for diversification (e.g. Hansson et al. 2013; Getz and Carlsen 2000). As the

following discussion demonstrates, this thesis goes beyond the economic-social dichotomy approach to gain a deeper understanding of the reasons/motives for diversification.

It has been argued that the agricultural literature has largely concentrated on the farms that have diversified and overlooked the ones that resisted and opposed diversification (Northcote and Alonso 2011). This study has addressed this gap in the literature by including family wineries, which are unwilling to pursue diversification. While these family wineries might recognise the economic benefits from wine tourism diversification, the findings revealed that their motivations are neither simply economic nor social in nature. Their behaviour and decision-making processes are influenced by semi-conscious and unconscious motives. This thesis supports a conclusion that the economic-social dichotomy approach is unable to reveal these semi-conscious and unconscious motives underlying wine producers' decisions to diversify their family winery.

One of the first studies to criticise the economic-social dichotomy approach adopted within the agricultural literature was Hansson et al. (2013)'s research on farmers' motives for diversifying their farm business in Sweden. The authors highlighted the context-dependency of farmers' motivations for diversification and emphasised the need to consider the social context, notably the context of the farm and the farm family. Similarly, the family business literature criticised the economic-social dichotomy and argued that family businesses' diversification decisions have to be understood within the context of the family.

Family business motivations for diversification have been linked to the concept of SEW. There is a general consensus within the family business literature that family businesses diversify less in order to preserve their socioemotional wealth (Gomez-Mejia et al. 2010). A direct link is established between the level of diversification and the level of SEW. Previous research demonstrated that family businesses limit the level of diversification, as they are predominantly motivated to sustain/preserve their socioemotional wealth

(e.g. Gomez-Mejia et al. 2010). This thesis presents a different view, contributes to this dominant debate within the family business literature and extends current understandings of the socioemotional wealth concept. The findings of this study demonstrated that family wineries actively engage in higher levels of diversification in order to preserve and increase their socioemotional wealth. That implies that research can move forward by re-evaluating the concept of SEW in relation to family businesses' levels of diversification, taking the heterogeneity of family businesses into account.

However, no consensus has been reached within the literature regarding diversification decisions and motivations. Little attention has been paid to the deeper/subconscious motives underlying family businesses' decisions to engage in diversification. Consequently this thesis has done that through adopting a multi-layered approach in order to gain a deeper, truer and more authentic understanding that is closer to the lived experiences of family winery owners. A layered approach has not yet been adopted for examining diversification decisions. This thesis argues that the multi-layered framework presented in the discussion chapter is able to reveal wine producers' semi-conscious and unconscious motives for diversification. In this instance, motivations for diversification have been linked to the concept of identity. This thesis claims that family businesses' diversification decisions are inextricably linked to family members' self-constructions. The multi-layered approach and the focus on identity are able to advance and deepen the understanding of family businesses' motivations and decisions to diversification. The identity layer (identity work) and power layer (identity regulation) were taken as focal points for examining family businesses' diversification decisions.

Within the agricultural literature, attention has been paid predominantly to farmers' identities during and after the diversification process, assuming farmers' agential role in negotiating, producing and reproducing a positive and preferred sense of self. Only limited attention has been paid to the deepest layer of the conceptual framework, notably the power layer, highlighting the importance of structural forces shaping individuals' self-identities. One exception is Stenholm and Hytti's (2014) recent study, examining how Finnish



farmers' identities are constituted and shaped by institutional forces. While they instigated the discussion on identity regulation within an agricultural context, the authors only considered formal and informal institutional pressures when discussing farmers' identities. The findings of this thesis contribute to the emergent discussion on identity regulation within an agricultural context and more generally in revealing that besides institutional pressures (e.g. the local wine-producing community), family stories and wine producers' own perception of the winemaking profession shape their identities.

Consequently, the findings of this thesis provide a new insight into the motives underlying family businesses' diversification decisions through adopting a layered approach. Research within the areas of family business and agriculture has largely focused on the first two layers of the conceptual framework, notably the socio-economic and family layers, and has not yet reached a consensus regarding motivations for diversification. The findings of this thesis contribute to both areas of research, revealing semi-conscious and unconscious motives for diversification through addressing the deeper layers of the conceptual framework, notably the identity and power layers. After having discussed the theoretical implications and contributions of the findings, the following section will outline the methodological implications.

#### **7.4. Methodological Contributions**

As this thesis aimed to extend current understandings of family businesses and their motives underlying diversification decisions, an interpretivist approach to research was adopted. Through adopting an interpretivist perspective, this research is able to contribute to the literature on family business diversification, currently dominated by functionalist assumptions about social science. Focusing predominantly on the economic-social dichotomy, the functionalist approach to research does not consider the social context and thus is unable to reveal deeper, subconscious motives for diversification. The interpretivist perspective is concerned with understanding participants' multiple life-worlds, experiences and their perceptions of 'reality'.

This thesis is able to move forward the discussions on motivations for diversification through adopting an interpretivist perspective and obtaining in-depth knowledge from interacting with wine producers on their own terms.

Furthermore, this thesis used discourse analysis (DA) as methodological approach for analysing and interpreting wine producers' accounts, focusing on the analysis of language. Within the family business and agriculture literatures, DA remains a largely under-utilised methodological approach. DA is concerned with examining text in context and recognises that texts are embedded in their social, political and historical context and cannot be understood in isolation (Cheek 2004; Jorgensen and Phillips 2002). In contrast to the predominant functionalist perspective adopted to examining diversification decisions and motivations, this thesis recognises the fact that wine producers' discourses are strongly embedded in their particular social, historical and family context. The local wine-producing community, their place attachment, the history of the winery and the family play a major role in how producers manage their winery and how they make decisions in relation to wine tourism diversification. Consequently, DA allowed for an in-depth analysis of wine producers' accounts, with a particular focus on how and why they are producing these discourses in context. The discourse analytical approach further enabled the emergence of semi-conscious and unconscious motives for wine tourism diversification. However, it could be argued that the methodological approach adopted might lead to a number of limitations for this study, which will be addressed in section 7.6 of this chapter.

## **7.5. Practical Contributions**

The understanding developed in this thesis regarding the motives underlying family wineries' decisions to diversify into wine tourism has wider impacts on the local economy, society and future tourism development initiatives. This research has potential implications for investment appraisals at the micro level, as well as for the regeneration of rural areas through tourism at the macro level.

First, at the micro level, it could be argued that a deeper understanding of family businesses' motivations for diversification impact on investment appraisals. The results of this research are likely to contribute to banks' appraisals of the risk-return calculation on family businesses' investments in wine tourism diversification activities. This research has shown that family businesses' wine tourism diversification decisions are driven not only by economic motives, but also by social and psychological motives. Wine producers' desire to preserve their socioemotional wealth and construct a distinct and coherent sense of self has influenced their decisions to pursue and invest in wine tourism activities. Based on the results of this research, funders need to appraise whether wine producers position themselves towards the traditional end of the identity continuum or the entrepreneurial end. In other words, funders need to be able to identify local entrepreneurs, with whom arrangements can be made. Constructing entrepreneurial wine producer identities, the investment in wine tourism activities is likely to result in increased performance, success and repayment. In this instance, wine producers want to be recognised within the community as entrepreneurial managers and business owners. By contrast, when wine producers construct a traditional, conventional sense of self, levels of success are likely to be much lower. Thus, wine tourism diversification activities can be perceived as low risk investments with high returns, when wine producers display unconventional, entrepreneurial self-identities. The results of this study have shown that wine producers' entrepreneurial identities are recognised when they actively engage in identity work and oppose and challenge social norms and traditions.

Second, at the macro level, the results of this research are likely to have implications for regional governments and destination management organisations (DMOs) when promoting and presenting diversification initiatives for rural regeneration. When pursuing economic regeneration, regional governments primarily aim for social cohesion, sustainability and economic growth. The results of this study have shown that the development of the tourism industry in Langhe has led to conflicting views and perceptions developed by wine producers regarding their involvement in wine tourism.

Regional government officials need to take into consideration the complexity of family wineries' motivations for diversification as well as wine producers' opposing identities (e.g. traditional vs. entrepreneurial identities) when relating to wine tourism diversification and position their message accordingly to ensure receptivity.

While government officials might highlight the economic benefits of diversification at the individual, societal and regional level, including increased profits, generation of additional income, as well as employment creation and retention, the results of this study indicate that a more refined approach is needed, emphasising the social and psychological benefits of wine tourism diversification. This refined approach is likely to strengthen their place attachment, the social cohesion amongst the local wine producers, build flourishing communities, improve individuals' wellbeing and ultimately lead to higher levels of wine tourism diversification.

## **7.6. Limitations**

The potential limitations of this study could be attributed to the methodological approach adopted when examining wine producers' motives for wine tourism diversification. It is believed that the researcher's social position inevitably influences the research process, including participants' responses during the interview process as well as the interpretation of these discourses. From a positivist perspective, this is perceived as an undoubted limitation of research such as this, due to the fact that the researcher is unable to adopt an objective, detached position.

Furthermore, the two gatekeepers played a major role in conducting this research. They predominantly selected the participants for this research, which could be seen as a limitation of this study. It is important to note that the researcher attempted to gain access to additional wine producers on an individual basis, however, due to the prevailing agrarian mentality and the sense of secrecy amongst the local wine-producing community, wine

producers were unwilling to participate in this research. Although the role of gatekeepers could be seen as a limitation, they proved highly valuable for this study.

Finally, while the wineries selected for this research have all engaged in various levels of wine tourism diversification (see findings chapter), non-diversified wineries were not included in this research. Even though the researcher attempted to contact non-diversified wine producers, these were unwilling to participate in this research, which could be seen as a further limitation of this study. Consequently, further research in this area could respond to certain of these potential limitations, which will be discussed in the following section.

## **7.7. Directions for Further Research**

While this thesis has contributed to a deeper understanding of the motives underlying family businesses' diversification decisions, further research could verify and develop these findings. First of all, further research could include family wineries, which have resisted diversification. There is more to learn about non-diversified family wineries and their reasons and motivations for resisting diversification (Hansson et al. 2013). Are their non-diversification decisions driven by similar, semi-conscious and unconscious motives or do their discourses reveal other motives? Diversified and non-diversified family businesses could thus be compared and contrasted to discover potential similarities or differences.

Secondly, further research could extend this study by examining wine producers' diversification decisions focusing on other wine regions in Italy, notably Tuscany. Participants in this case study noted that Tuscany is "*10 years ahead*" of Piedmont in relation to wine tourism development. In this instance, future inquiry could reveal the extent to which Tuscan wine producers have diversified into wine tourism and whether they primarily display traditional/conventional or entrepreneurial/unconventional identities.

Do social/institutional forces, such as the local wine-producing community, predominantly regulate Tuscan wine producers' identities or do they challenge and oppose these institutional pressures and traditions?

Furthermore, research could also be extended to other countries to provide a country comparison. In this instance, Piedmont could be compared to other wine regions within old world wine countries (e.g. France, Spain) or new world wine countries (e.g. Australia, New Zealand, Canada). As was established in chapter III (case study chapter), it might be the case that in old world wine countries, due to the long history and winemaking traditions, wine producers predominantly display traditional wine producer identities, whereas wine producers in new world wine countries primarily construct unconventional/entrepreneurial identities. Are institutional pressures and traditions more prevalent in old world wine countries compared to new world wine countries and do wine producers in new world wine countries predominantly construct entrepreneurial identities due to the fact that their wineries tend to be much younger and not necessarily guided and influenced by family norms, traditions and values?

From a place-based identity perspective, further research could investigate whether wine tourism development strengthens or is likely to threaten wine producers' place identity. Having developed a strong place attachment, traditional/conservative wine producers might perceive wine tourism as a threat to their place identity, whereas entrepreneurial wine producers might be more likely to embrace tourism and recognise the development of the wine tourism industry to strengthen their place identity.

Finally, from a methodological point of view, further research could combine a number of qualitative methods, such as semi-structured interviews, participant observation, focus groups and/or adopt a photo-elicitation approach to interviewing for examining how participants construct their self-identities in 'real-life' situations.

## **7.8. Chapter Summary**

This chapter has brought this thesis to a conclusion by discussing the empirical contributions of this case study as well as the core research themes running throughout the thesis. Furthermore, theoretical and methodological implications and contributions of the findings were revealed, highlighting the importance of an interpretivist approach to research in gaining deeper understandings of the motives underlying family wineries' decisions to diversify into wine tourism. Finally, potential limitations have been discussed in relation to the methodological approach adopted, as well as directions for future research, as a way of responding to some of these limitations.

## **7.9. Overall Conclusions**

This case study of family wineries in Langhe revealed that wine tourism diversification is generally perceived as a suitable and viable option to develop and extend the family winery. The empirical findings demonstrated that reasons and motivations for diversification are complex, numerous and vary between participants. Similar to previous research in this area, the findings revealed that wine producers display a combination of economic and social motives for diversification.

However, this case study can be differentiated from previous research and makes its main contribution from providing a more encompassing and convincing explanation of wine producers' motivations for diversification through adopting a multi-layered approach. In this instance, this thesis not only revealed wine producers' conscious motives (e.g. economic and social motivations) but also their potential semi-conscious and unconscious motives for engaging in or resisting wine tourism diversification. This thesis linked the concept of identity to wine producers' motivations for diversification to examine the extent to which wine producers' diversification decisions were influenced by deeper layers, notably their self-constructions. Consequently, the findings revealed that through constructing traditional/conventional

identities, wine producers highlighted their reluctance to engage in wine tourism diversification, whereas entrepreneurial wine producers displayed their willingness to pursue wine tourism diversification.



## Appendix 1

### Vineyard Landscape of Langhe



Commune of *La Morra* (summer 2016)



Commune of *La Morra* (autumn 2016)



Commune of *Barbaresco* (summer 2016)

### **Participating Family Wineries**



Family Winery (Case 7)



Family winery (Case 10)



Family Winery (Case 13)



Family Winery (Case 14)



Family Winery (Case 19)

## Appendix 2

### Participant Profiles

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#### Case 1

Participant Name: Elia  
Winery: Foundation 1919, 3<sup>rd</sup> generation, annual production: 30000 bottles  
Responsibility: Owner, wine-production, administration  
Demographics: Female, age: 45-55  
Location: Barolo

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#### Case 2

Participant Name: Carlotta  
Winery: Foundation 1958, 2<sup>nd</sup> generation, annual production: 30000 bottles  
Responsibility: Wife of winery owner, B&B, wine tastings, administration  
Demographics: Female, age: 45-55  
Location: Barbaresco

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#### Case 3

Participant Name: Davide  
Winery: Foundation 1885, 4<sup>th</sup> generation, annual production: 80000 bottles  
Responsibility: Owner, wine-production, wine tastings  
Demographics: Male, age 45-55  
Location: Barolo

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#### Case 4

Participant Name: Luisa  
Winery: Foundation 1990, 2<sup>nd</sup> generation, annual production 50000 bottles  
Responsibility: Daughter of owner, wine tastings  
Demographics: Female, age 25-35  
Location: Mondovi

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**Case 5**

Participant Name: Maria  
Winery: Foundation 1978, 2<sup>nd</sup> generation, annual production 70000 bottles  
Responsibility: Daughter of owner, administration, wine tasting  
Demographics: Female, age 25-35  
Location: Barbaresco

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**Case 6**

Participant Name: Isabella  
Winery: Foundation 1924, 3<sup>rd</sup> generation, annual production: 65000 bottles  
Responsibility: Wife of owner, administration, wine tastings  
Demographics: Female, age 45-55  
Location: Dogliani

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**Case 7**

Participant Name: Gabriele  
Winery: Foundation 1950, 2<sup>nd</sup> generation, annual production: 21000 bottles  
Responsibility: Owner, wine-production, wine tastings  
Demographics: Male, age 55-65  
Location: Neive

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**Case 8**

Participant Name: Bruno  
Winery: Foundation 1964, 3<sup>rd</sup> generation, annual production: 120000 bottles  
Responsibility: Part-owner, administration, wine tasting  
Demographics: Male, age 35-45  
Location: Neive

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**Case 9**

Participant Name: Marco  
Winery: Foundation 1948, 4<sup>th</sup> generation, annual production: 20000 bottles  
Responsibility: Son of owner, administration, wine tastings, B&B  
Demographics: Male, age 25-35  
Location: Barbaresco

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**Case 10**

Participant Name: Anna  
Winery: Foundation 1982, 2<sup>nd</sup> generation, annual production: 150000 bottles  
Responsibility: Wife of owner, administration, wine tasting  
Demographics: Female, age: 55-65  
Location: Monforte d'Alba

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**Case 11**

Participant Name: Alice  
Winery: Foundation 1965, 3<sup>rd</sup> generation, annual production: 65000 bottles  
Responsibility: Daughter of owner, administration, wine tastings  
Demographics: Female, age 25-35  
Location: Neive

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**Case 12**

Participant Name: Chiara  
Winery: Foundation 1941, 3<sup>rd</sup> generation, annual production: 45000 bottles  
Responsibility: Owner, administration, wine tastings  
Demographics: Female, age 45-55  
Location: La Morra

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**Case 13**

Participant Name: Fabio  
Winery: Foundation 1957, 3<sup>rd</sup> generation, annual production: 110000 bottles  
Responsibility: Part-owner, administration, wine tastings  
Demographics: Male, age 35-45  
Location: Vezza d'Alba

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**Case 14**

Participant Name: Tiziana  
Winery: Foundation 1978, 2<sup>nd</sup> generation, annual production: 90000 bottles  
Responsibility: Wife of owner, administration, wine tastings  
Demographics: Female, age 35-45  
Location: Monforte d'Alba

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**Case 15**

Participant Name: Elena  
Winery: Foundation 1990, 4<sup>th</sup> generation, annual production: 85000 bottles  
Responsibility: Owner, administration  
Demographics: Female, age 45-55  
Location: Novello

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**Case 16**

Participant Name: Silvia  
Winery: Foundation 1953, 3<sup>rd</sup> generation, annual production: 85000 bottles  
Responsibility: Daughter of owner, administration, wine tastings  
Demographics: Female, age 25-35  
Location: Serralunga d'Alba

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**Case 17**

Participant Name: Pietro  
Winery: Foundation 1948, 3<sup>rd</sup> generation, annual production: 30000 bottles  
Responsibility: Owner, wine production, administration, wine tastings  
Demographics: Male, age 35-45  
Location: Diano d'Alba

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**Case 18**

Participant Name: Alessandro  
Winery: Foundation 1979, 2<sup>nd</sup> generation, annual production: 180000 bottles  
Responsibility: Owner, administration, wine tastings  
Demographics: Male, age 55-65  
Location: Castiglione Falletto

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**Case 19**

Participant Name: Marcello  
Winery: Foundation 1971, 3<sup>rd</sup> generation, annual production: 50000 bottles  
Responsibility: Family-member, administration, wine tastings  
Demographics: Male, age 35-45  
Location: Barbaresco

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**Case 20**

Participant Name: Paolo  
Winery: Foundation 1959, 6<sup>th</sup> generation, annual production 120000 bottles  
Responsibility: Part-owner, administration, wine tastings, shop owner  
Demographics: Male, age 25-35  
Location: La Morra

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**Case 21**

Participant Name: Gian-Luca  
Winery: Foundation 1896, 4<sup>th</sup> generation, annual production: 110000 bottles  
Responsibility: Administration, wine tastings  
Demographics: Male, age 25-35  
Location: Serralunga d'Alba

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**Case 22**

Participant Name: Elio  
Winery: Foundation 1982, 3<sup>rd</sup> generation, annual production: 45000 bottles  
Responsibility: Son of owner, wine production, wine tastings  
Demographics: Male, age 25-35  
Location: Treiso

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**Case 23**

Participant Name: Christina  
Winery: Foundation 1878, 7<sup>th</sup> generation, annual production: 110000 bottles  
Responsibility: Part-owner, administration, wine tastings  
Demographics: Female, age 25-35  
Location: La Morra

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**Case 24**

Participant Name: Beatrice  
Winery: Foundation 1902, 4<sup>th</sup> generation, annual production 75000 bottles  
Responsibility: Administration, wine tastings  
Demographics: Female, age 35-45  
Location: Serralunga d'Alba

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**Case 25**

Participant Name: Elio  
Winery: Foundation 1997, 1<sup>st</sup> generation, annual production: 5000 bottles  
Responsibility: Owner, wine production, administration, wine tastings  
Demographics: Male, age 35-45  
Location: Neive

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**Case 26**

Participant Name: Nadia  
Winery: Foundation 1945, 3<sup>rd</sup> generation, annual production: 65000 bottles  
Responsibility: Part-owner, administration, wine tastings  
Demographics: Female, age 45-55  
Location: Barolo

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**Case 27**

Participant Name: Valeria  
Winery: Foundation 1975, 5<sup>th</sup> generation, annual production: 40000 bottles  
Responsibility: Owner, wine production, administration, wine tastings  
Demographics: Female, age 35-45  
Location: Monforte d'Alba

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**Case 28**

Participant Name: Giulia  
Winery: Foundation 1970, 3<sup>rd</sup> generation, annual production: 350000 bottles  
Responsibility: Part-owner, administration, wine tastings  
Demographics: Female, age 35-45  
Location: Monforte Roero

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