

A framework for the evaluation of winery servicescapes: A New Zealand case

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Abstract: In an increasingly competitive market to attract visitors, wineries are often seeking new means to enhance the visitor experience. However, despite recognition of the importance in the wine tourism literature of the setting in which wine experiences occur there has been little adoption of the servicescape concept from the marketing literature and its adoption as a potential diagnostic tool. The paper utilizes the concept to develop a potential diagnostic tool that may be used by wineries and cellar door venues to evaluate their servicescape attributes. Preliminary results are provided which demonstrate the utility of the servicescape framework but further research is required to test the framework in different culture and design settings.

Keywords: Servicescape; New Zealand; Wine tourism; Cellar door

Abstract: En mercados cada vez más competitivos, donde se intentan captar mayores cuotas de demanda, las bodegas buscan a menudo nuevas formas de realzar las experiencias de los visitantes. Sin embargo, a pesar del reconocimiento de la importancia en la literatura del constructo "turismo del vino" y "experiencias del visitante", el ajuste entre éstas últimas y el nuevo concepto de interacción social (servicescape) como herramienta potencial de diagnóstico ha tenido poca atención en la literatura del marketing. El papel que utiliza el concepto comentado para desarrollar un instrumento de diagnóstico potencial, debería ser usado por las bodegas y distribuidoras para evaluar los atributos de ésta llamada "interacción social". Los resultados preliminares proporcionan y demuestran la utilidad del marco conceptual de la "interacción social", pero se requiere de investigaciones adicionales en diferentes culturas y entornos, así como ajustes de diseño del mismo.

Keywords: Relación comida versus bebida; Picante; Pizza; Diferencias de género

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Introduction

Wine is an increasingly important part of the New Zealand rural economy. The number of wineries in New Zealand has increased from 262 in 1997 to 543 in 2007 with the number of tonnes crushed growing from 60,000 tonnes to 205,000 tonnes over the same period and further growth expected to continue in the foreseeable future. This has meant that total production has also grown from 45.8 million litres in 1997 to 147.6 million in 2007 (New Zealand Winegrowers 2007). However, the per capita consumption of wine in New Zealand has only marginally increased over the same period, meaning that wineries are constantly seeking to expand their export base and/or increase the amount of domestic consumption.

This is being done via a variety of marketing techniques and promotional channels, including, for larger companies, television, magazine and other forms of media advertising as well as event sponsorship. However, the vast majority of New Zealand wineries are small producers by international standards (Hall and Mitchell 2008). For example, of the 543 wineries that existed in the country in 2007, 483 of them produced less than 200,000 litres each and only nine produced more than two million litres (New Zealand Winegrowers 2007). This has meant, therefore, that the wine market is extremely competitive and that wineries are often looking for new avenues of sale such as direct sales from the wineries, what is widely referred to as cellar door sales or wine tourism. However, while there is a growing literature on wine tourism as well as business and industry interest in the subject, the way in which the physical aspects of the wineries themselves contribute to the overall marketing of their product has been little studied, even though 'atmosphere' for example, is recognized as a significant factor in the cellar door experience (Hall et al. 2000; Carlsen and Charters 2006; Mitchell and Hall 2006). Therefore, this article aims to develop a potential framework for the evaluation of what is defined in the marketing literature as the 'servicescape', the physical evi-

dence of service in wineries and its potential value as a diagnostic tool.

The paper is divided into several sections. First, it provides a background to wine tourism in New Zealand. Second, it discusses the servicescape context in light of research on wine tourism. Third, it presents the methodology for the development of the servicescape framework and then goes on to discuss its application. Finally, the paper draws some preliminary findings as to its application.

Wine Tourism in New Zealand

The New Zealand Ministry of Tourism (2007) defines wine tourists as international and domestic visitors, aged 15 years and over, who visit a winery at least once while travelling in New Zealand. Tourists who visit multiple wineries in a single area or visit a single winery on more than one occasion are counted only once. However, the Ministry approach does not count residents of an area who visit a winery within their 'local area' as a wine tourist. Unfortunately, what exactly constituted a local area was not defined in the report. Therefore, Ministry figures understate the actual frequency of winery visitation among New Zealand residents and, to a lesser extent, international tourists when in comparison to other New Zealand research on the subject (Mitchell and Hall 2006; Hall and Mitchell 2008).

Using data derived from the international and domestic tourism surveys the Ministry of Tourism (2007) estimated that in 2006 507,500 tourists visited New Zealand wineries, made up of 44% international tourists and 56% domestic tourists (including those on overnight and day trips).

They estimated that the number of international tourists visiting wineries increased from 108,500 visitors in 2001 to 224,700 visitors in 2006, an annual average growth rate of 16%. In contrast, the number of domestic wine tourists was estimated to have declined from 532,400 visitors in 2001 to 282,800 in 2006. The Regional Tourism Organisation (RTO) areas which attracted the greatest number of international wine tourists over the 2005/2006

period were Marlborough (an average of 45,300 wine visitors per year, or 22% of all international wine visitors), Hawke's Bay (40,100, 19%), and Auckland (34,600, 16%). These market shares were relatively consistent over the period 2001-2006 and the numbers were estimated to have grown in line with the total (Ministry of Tourism 2007).

In contrast to the use of secondary survey data by the Ministry of Tourism, a national survey of wineries with respect to their utilization of wine tourism as part of their business practices was conducted in 1997/98 (Hall and Johnson 1998) and repeated, with minor modifications, in 2003/4 (Christensen et al. 2004). The survey was the first national level survey of the supply of the wine tourism product conducted in the world and produces some distinctly different results when compared to those obtained by other surveys as the focus is on visits rather than individual visitor activity. The sample population for each survey was the total number of wineries in the country.

Wineries reported that wine tourism is important in terms of:

- enhancing product/brand awareness
- helping to differentiate one wineries wine from another
- helping to develop mail order sales
- and, in the 2003 survey only, helping to educate customers.

Wineries share a strong belief that wine tourism enhances product/brand awareness, with those either agreeing or strongly agreeing with this statement totalling 72.4% in 1997 and 73.2% in 2003 while almost half favour wine tourism's role in differentiating their wine from another wineries. In 2003, 54.2% supported a statement that wine tourism was important for mail order sales growth. In general wineries believed that tourism provided them with significant marketing opportunities.

Other research also supports the value of tourism to New Zealand wineries (e.g. Hall, Longo et al. 2000; Mitchell and Hall 2001a, 2001b, 2004, 2006; Simpson et al. 2004). However, while the potential significance of winery or cellar door design and atmosphere on wine tourists' satisfaction

and potential long-term relationship with wineries is noted, no analysis of the physical environment of the cellar door experience has been undertaken.

Servicescapes and the Cellar Door

Studies in New Zealand have found that cellar door sales account for, on average, around 15% to 20% of wine sales but there is substantial variability in this figure with the overall size of wine production being a significant influence on the overall importance of wine tourism with cellar door sales being more important for small producers (Johnson and Hall 1998; Hall, Longo et al. 2000; Christensen et al. 2004). Usually cellar door sales comprise a larger amount of sales early in the development of a winery and are particularly important for the smaller wineries, where there are examples where more than 75% of revenue is gained through the cellar door (Christensen et al. 2004; Mitchell and Hall 2006). Hall and Mitchell (2008) state that one winery in New Zealand reported that just one bottle of their Reserve Pinot sold at the cellar door gave them the same return as seven bottles of their normal Pinot Noir sold via their New Zealand distributor, even though the retail price for the reserve is only around 2.5 times that of the normal Pinot. Such direct sales can improve margins considerably for wineries as payments to intermediaries and retailers take their share for retail sales.

Drawing on lessons from the environmental design, retail and marketing literature this paper takes the perspective that the winery and cellar door space are part of the overall packaging of wine as experienced by wine tourists. Product attributes, packaging, display, retail atmospherics, and the physical environment are nested inside each other to help generate sales, encourage the development of relationships with customers and develop positive experiences and customer satisfaction. Literature on servicescapes (Bitner, 1986, 1990, 1992; Sherry 1998; Newman 2007) and retail atmospherics (Baker et al., 1994, 1998, 2002) clearly associates the environment with service quality.

"The servicescape is the physical setting

within which service occurs and which influences customers' perceptions of the servicescape (perceived quality) and the subsequent internal (i.e. degree of satisfaction) and external (i.e. behaviour with respect to patronage and purchase) response" (Hall and Mitchell 2008: 179). The servicescape is important for consumer experiences because this environment gives customers and employees tangible and intangible signs and signals about potential service delivery. Hall and Mitchell (2008) stress the importance of servicescapes for wine sales but in the context of the retail setting as opposed to the winery setting and cellar door sales.

Bitner (1992) argues that the environment in which the service encounter and experience are jointly produced between customer and producer, i.e. the servicescape, affects customer outcomes and experiences. She distinguishes the interior servicescape which includes interior design, equipment, signage and layout, from the exterior servicescape which includes exterior design, parking, the landscape, and the surrounding environment. Although, as Wels-Lips et al. (1997) note, it may be worthwhile to restrict the servicescape from a production standpoint to the marketing-controlled environment, and to distinguish it from environmental influences which are not marketing-controlled, such as the weather.

Zeithaml, Bitner and Gremler (2006) suggest that the physical evidence of a service, or *servicescape* offers tangible communication about the service provided. Wineries can use the tangible cues of their physical design and the interior and exterior attributes of a winery and its environs for visitors and customers to assess levels of satisfaction, before, during and after consumption. An example of how the servicescape may affect satisfaction *before* consumption is through cues such as visual and virtual images of winery layout, external design and car parks.

Although the potential significance of the environment in which the wine tourism experience occurs is seen as significant for the nature of that experience the role of the servicescape has received only passing acknowledgement (e.g. Dodd 1995; Dodd and

Bigotle 1997; Mitchell and Hall 2001a; O'Neil et al. 2002) and little in-depth investigation (Hall and Mitchell 2008), with the focus tending to be on the personal attributes of the service encounter rather than the tangible attributes of the winery. This is despite recognition of the importance of the tangible evidence of service for wineries. As O'Neil et al. (2002: 345) state, "The cellar door is often the first contact consumers have with a winery and its wines. Therefore every aspect of the cellar door (including layout, appearance and staff) is of extreme importance. The cellar door is unique in that it provides the visitor with a complete profile of the winery and its wines, and it is here that perceptions of the winery are established". Therefore, gaining a better understanding of the servicescape may potentially assist wineries in improving customer experiences as well as providing opportunities for brand development and customer relationship building.

Methodology

Given that no winery specific servicescape framework had been developed, the study utilized elements identified from relevant wine tourism, wine marketing and servicescape literature (e.g. Bitner 1992; Wakefield and Blodgett 1996). A draft framework was developed and pre-tested in the field on several wineries so as to determine the applicability of servicescape dimensions.

The final study was undertaken over a three month period between August and October 2007 and was used to assess the servicescapes of 27 South Island wineries in New Zealand. In several cases multiple site visits were conducted so as to try and ensure that non-controllable environmental conditions such as the weather were consistent over all the wineries that were evaluated. The wineries in this study included eleven in the Canterbury region (including Waipara and Kaikoura sub-regions) and seventeen in the Marlborough region. Wineries were selected so as to represent different volumes of annual wine production as well as architectural designs.

Research was undertaken via a form of visual content analysis (CA). CA is an ob-

servational research method that is used to systematically evaluate the actual and symbolic content of all forms of communication. In addition to its application to recorded communication CA is an increasingly important element of hermeneutics and semiotic analysis in critical social science and in consumer studies (Aghuvia 2001; Hall and Valentin 2005).

The framework used for the study of the wineries initially had five dimensional sections that were categories derived from the servicescape literature: physical external and internal presentation; staff presentation and; ambience and merchandise, in order to provide an overall picture of the on site experience of each of the 27 wineries visited. However, following field testing it was decided to add a sixth element 'Direct and Indirect External Influences' which, although not necessarily including elements directly controlled by the winery, did include material that was co-produced with other organizations. In addition, identification of this material may have broader implications for the presentation of wine regions or winery clusters to consumers.

Each section evaluated the physical presentation of a range of servicescape dimensions of the winery and included sections on the following dimensions:

Section A: Physical Environment – External Presentation. Aspects of the servicescape that are often perceived on first impression. The architecture of the building, exterior signs, car parks paths and access-ways can often provide a perception of what the likely experience outcome may be at each winery. The condition of the paintwork, outdoor seating arrangements and landscape were also evaluated.

Section B: Physical Environment – Internal Presentation. Including interior design, flow and colour. Condition of the functional equipment was also evaluated along with the condition of the paintwork, and housekeeping standards. In this section, evidence of merchandising and design skill is examined on a variable scale.

Section C: Staff Presentation. Includes uniforms and personal grooming as an important element of the servicescape and one that can often be overlooked in the overall impression of a servicescape

Section D: Interior and Exterior Ambient Conditions. Includes evidence of shelter and impact on the natural environmental setting of the servicescape. Also some of the more intangible aspects such as air temperature, noise, odour are evaluated.

Section E: Product/Merchandise/Brochures/Menus/Web Pages A broader section that deals with many of the items customers take with them from the experience including the wine bottle and label, wine carriers, bags, souvenirs and brochures. This section also includes an evaluative score for the winery web page.

Section F: Direct and Indirect External Influences on Servicescape. Includes external impact of other tangible and intangible variables including information provided by people external to the winery and tangible evidence such as maps, magazines, events or brochures the winery may be included in. Some of these variables may be controllable if information flows are managed and controlled by the winery. Other variables such as weather conditions may not be within control of the winery.

Scoring for the dimensions was ranked: Very good –Excellent 7 – 10; Satisfactory – Good; 4 – 6; and Poor 1 – 3. Spreadsheets were also developed to provide results from the servicescape framework score sheets for each winery (Tables 1-6). An informal 'wine log' was also used also to assess each winery and provide a brief commentary summarising certain criteria identified in the servicescape framework evaluation and general perceptions and observations. This was also done to achieve consistency in approach to each winery. Similarly, observations and recording were typically done by pairs of observers in order to reduce impacts of personal bias.

Table 1 Section A-Physical Environment: External Presentation

	Very Good - Excellent 7-10	Satisfactory-Good 4-6	Poor – Not applicable 1-3	Total Score
Architecture/Exterior building design	Consistent style reflecting wine brand or image	Inconsistent with wine brand or image or mixed architectural design	No architectural design/inconsistent with wine brand or image	
Car Parking	Ample spaces/ close to entrance/well paved or sealed	Moderate amount available/moderate walk to entrance. Average paving or sealing surface	Minimal spaces available/long walk to entrance/poor paving or sealing surface.	
Signage on building exterior/Fascia/billboards	Excellent condition. Clean. Advertises business name and/or products accurately	Fair condition. Advertises business name and/or products	Poor condition. Appears rarely cleaned. Fails to promote business name and/or products	
Opening hours/other notices	Opening hours sign displayed and in good condition. Reflects current trading hours. Other relevant notices displayed/ good condition.	Current trading Hours displayed. Most other relevant notices on display and in reasonable condition	No opening hours displayed. Notices in poor condition or not current	
Paint-work/Walls/window frames	Clean. Excellent condition.	Reasonable condition.	Needs cleaning. In poor repair.	
Pavement area/Doorways	No rubbish. Appears regularly swept. Door paintwork good condition. Door mats good condition. Safety.	Appears swept as required. Door paint work fair condition. Door mats fair condition.	Not swept. Door paintwork in Poor condition. Door mats in poor condition/ Rubbish	
Access (for buggies and wheelchairs where appropriate)	Entrance designed for safety for buggies, wheelchairs and other mobility devices.	Reasonably safe access for buggies, wheelchairs and other mobility devices.	Entrance unsuitable for buggies. Wheelchairs and other mobility devices.	
Windows/exterior window treatments.	Clean windows. Blinds umbrellas/ awnings in good condition - bright and attractive.	Clean windows. Blinds umbrellas/ awnings reasonably clean and in good condition	Dirty windows. Blinds umbrellas /awnings in poor condition	
Outdoor seating furnishing and equipment arrangement	Modern/style suits overall architecture of winery/well maintained.	No specific style to match winery design or architecture /average condition.	Plastic or ugly furniture/shabby poor condition.	
Window displays/promotions	Attractive display. Eye catching from outside. Promotes products/prices/ service inside. Material current.	Attempted eye catching display. Tries to promote products/prices/ service inside. Material current.	Poor attempt at window display. Conflicting messages/out of date material.	
External Lighting	All lights either are or appear in working order. Lighting does or may enhance exterior	Lighting either in or appears to be in working order but may not enhance outdoor area	Poor external lighting/apparent dark areas	
Overall impression of exterior/layout/design/landscape	External presentation creates highly favourable impression. Attracts interest and looks inviting	Reasonable external presentation likely to attract and encourage customers to enter	External presentation of premises unlikely to attract interest or encourage customers to enter	
Total Score				

Table 2 Section B - Physical Environment: Internal Presentation

	Very good- Excellent 7-10	Satisfactory -Good 4-6	Poor – Not applicable 1-3	Total Score
Interior design/colour/ style/Furnishings	Professionally designed. Conforming to high quality distinctive design/consistency in style and colour	Good quality/ consistency in design/style/colour	No design/poor quality/confused style/theme/colours	
Interior lighting/fixtures and fittings	Good lighting for displays areas/in working order/ Lighting creates bright attractive image. High quality fixtures and fittings in good condition/conforming to high standard of overall design	Reasonable lighting for displays/ fittings in working order. Fixtures and fittings of reasonable quality, in good condition/ in keeping with and suitable for overall style	Dim or unsuitable Lighting for displays. Fittings not in working order. Fixtures and fittings of poor quality, in poor condition or unsuitable for purpose. Too many conflicting styles.	
Functional Equipment/cash registers/fridge	Excellent condition	Average condition	Poor condition/dirty	
Clean functioning Restrooms	Spotlessly clean with ample toiletry supplies of soap/toilet paper. Has hand cloth/air drying facility.	Reasonably clean. Minimal spare toiletries.	Dirty/no soap/no toilet paper.	
Housekeeping	Winery retail area very clean, tidy and well maintained. Presents a professional image.	Retail area reasonably clean and tidy. Good maintenance. Flooring reasonably clean condition.	Retail area poorly cleaned or untidy. Poor maintenance. Dirty floors	
Merchandising and Product Display	Evidence of good merchandising skills. Retail interior used well with balance and good displays. Attractive product presentation	Evidence of reasonable merchandising skills. Retail interior used reasonably well. Most shelves 'faced-up'. Limited gaps	Little or no evidence of merchandising skills. Poor use of space. Unattractive product display. Scrambled merchandising	
Table décor/coverings	Fresh flowers/stylish/cutlery and crockery style in keeping with interior décor design. Clean fresh table cloths/matching serviettes	Minimal table decoration/dried flowers/mismatched crockery/cutlery/no table cloths/moderately clean/paper serviettes	No table decoration/dirty tables/cluttered/chipped or dirty crockery/no serviettes	
Point of Purchase/cellar door area	Well designed, attractive and functional. Has aesthetic appeal. uncluttered	Practical design, uncluttered.	Poor design. Cluttered. Detracts or is mismatched with overall appearance of rest of the servicescape	

Table 2 (cont.) Section B - Physical Environment: Internal Presentation

	Very good- Excellent 7-10	Satisfactory -Good 4-6	Poor – Not applicable 1-3	Total Score
Layout and arrangement of internal floor space	Attractive. Has immediate impact/ distinctive qualities that differentiate it from other wineries / excellent spatial layout	Welcoming/ layout planned to suit only access or to maximise occupancy	Austere or cluttered/ unattractive/no spatial planning	
Indoor/Outdoor flow	Direct/excellent flow/outside and inside appear unified	Indirect/un-natural flow/some unification	No flow/segregated	
Artefacts/ Collectibles/ Artwork/ photos/Awards	Artistic /distinctive/ Integrates well with overall theme/ excellent condition	Mixed theme/good condition	None or cluttered or austere/no relationship with winery or theme of winery/dirty	
Total Score				

Table 3 Section C-Staff Presentation

	Very good- Excellent 7-10	Satisfactory-Good 4-6	Poor 1-3	Total Score
Uniforms	Clean/tidy/colour coordinated/branding	Clean/Tidy/colour coordinated	No uniform/uncoordinated	
Personal Grooming	Impeccable/well groomed/hair off face	Tidy	Untidy	
Total Score				

Table 4 Section D - Interior and Exterior Ambient Conditions

	Very good- Excellent 7-10	Satisfactory-Good 4-6	Poor 1-3	Total Score
Exterior Shelter	Excellent shelter from wind and sun. Integrates with overall architectural design of winery	Moderate shelter from wind and sun	No or little shelter	
Interior Temperature / air quality	Comfortable	Mostly comfortable	Uncomfortable /unpleasant/stuffy	
Noise	Comfortable	Mostly comfortable	Uncomfortable /unpleasant	
Music	Suitable for atmosphere	Mostly suitable	Unsuitable	
Odour	Fresh/Pleasant	Mostly pleasant	Smoke/stuffy/musty/dusty	
Natural Environment / Impact of winery on setting	Surrounding environment has been considered in winery design	In keeping with surroundings	Not in keeping with natural environment or impacted in parts, ie erosion, rubbish on ground	
Total Score				

Table 5 Section E - Product/Merchandise/Brochures/Menus/Web Page

	Very good- Excellent 7-10	Satisfactory-Good 4-6	Poor 1-3	Total Score
Wine Bottle/ Label	Headline defines brand / unique or distinctive / easy to read / uncluttered layout, copy and visuals / artistic	Fairly distinctive bottle or label / easy to read / ordinary looking layout, copy and visuals	Non-distinctive branding / cluttered / bland layout, copy and visuals	
Wine Bottle Carrier	Artistic / strong winery branding/ packaging used as an advertising medium	Modest winery branding / easy to carry	Plain, no artwork/cheap looking	
Merchandise including Souvenirs/Gifts/ T-shirts/Aprons /Wine Glasses	Wide selection / tastefully designed in keeping with wine brand and image	Moderate selection / generic branding with no artistic flair	None or minimal merchandise available / unbranded	
Brochures/ business cards/price list stationery	Informative / distinctive winery branding and logos/ artistic/paper /easy to read / good layout	Informative/ indistinct winery branding and logos/ordinary paper	Cluttered layout/no clear branding/ unprofessional looking	
Menu	Clean and crisp presentation. Excellent structure, easy to read / distinctive winery branding and logo / integrated marketing communication(IMC)	Clean, tidy / good structure, easy to read / has winery logo or branding / not integrated with other marketing communication literature	Tatty looking menus / not integrated with other marketing communication literature / out of date / hand written price amendments	
Web Page Design	Easy to navigate website / well designed / colourful / (IMC)/distinctive branding / informative / artistic headline, copy layout, visuals / links provided	Easy to navigate / good design / plain / some branding / no links	Difficult to navigate / Indistinct branding / amateur looking	
Total Score				

Table 6 Section F - Direct/Indirect External Servicescape Influences

	Very good- Excellent 7-10	Satisfactory-Good 4-6	Poor 1-3	Total Score
Tangible Directions to Winery via Tourism company / Information Centres / Maps	Clear and concise/ multi-national signs and symbols or diagrams. Distinctive and defines brand. Uncluttered layout, copy and visuals/artistic	Fairly clear instructions that are reasonably easy to read. A few symbols and diagrams but ordinary looking layout, copy and visuals	Non-distinctive branding / cluttered / bland layout, copy and visuals. No multi-national symbols or signs.	
Regional or area promotional activities / trade fairs	Positively promote and accurately represent or inform desired market image positioning of winery	Promotes winery but does not represent actual market position or image of	No activities planned in area or taken advantage of by winery	
Tourist or Travel Agents/Bus or Tour Operators own servicescape	Professional appealing image and brand association positioned to complement or enhance winery image and branding	Average image brand and image association. No flair. May not match winery visitor demographic	Poor image and brand association. Unprofessional and unattractive staff and premises. No effort put into effectively promoting winery	
Environmental conditions affecting access – weather / road signage	Easily accessible roads-wide / smooth tarseal surface / pleasant or interesting scenery in-keeping with winery design and reflecting market positioning	Average conditions – road / signage / indistinctive or uninteresting scenery / average or uncomfortable road journey / reasonable road signs	Adverse conditions, poor road- potholes / shingle surface / narrow no road signs / scenery not in keeping with image of winery / Exposed and wind gusts / steep grade road	
Wine Retail outlets	Professional looking servicescape. Staff trained in product knowledge of winery and wines in general. Distinctive brand displays and profiles.	Premises not outstanding in presentation as a wine outlet. Wine not attractively displayed or profiled. Staff have only generalised knowledge of wine.	Untidy or cluttered outlet. Wine boxes used to display wine with no brand profiling. Staff have minimal or no wine knowledge.	

Results

Results are shown to illustrate the potential of the approach with respect to winery servicescape evaluation. The intention is to identify perceptual and empirical dimensions of servicescapes rather than for the evaluation to be used as ranking system. Scores are provided for individual wineries as well as observations with respect to regional characteristics.

The wineries with the highest scores for their physical external presentation included Wither Hills, Nautilus and Allan

Scott with the lowest being Daniel Schuster, Hintons, Bouldevines and Torlesse (Tables 7 and 8).

Most wineries scored reasonably well in areas of paintwork of exterior walls, window frames and door ways. Exterior signage and billboards were in general of a high standard with the average signage scoring 7.1. Many car parks were found to be of a lower than expected standard in the study in terms of aesthetic appeal and sealing surfaces. The average score for car parks was only 6.5.

Table 7 Physical Environment – Highest Scores

Physical Environment: External Presentation	Allan Scott	Wither Hills	Nautilus
Architecture/ext building design	10	10	7
Car parking	10	10	10
Signage on building ext/fascia/billboard	10	10	9
Opening hours/other notices	9	8	10
Paintwork-walls/window frames	10	10	10
Pavement/doorways	10	10	10
Access for buggies/disabled	10	8	9
Windows/ext window treatments	10	10	9
Outdoor seating/equipment	10	10	10
Window displays/promotion	0	0	0
Ext lighting	10	10	7
Overall impression ext/layout/design/landscape	10	10	9
Total	109	106	100

Table 8 Physical environment – lowest scores

Physical Environment: External Presentation	Hintons	Daniel Schuster	Torlesse	Bouldvines
Architecture/ext building design	1	7	7	6
Car parking	2	1	7	2
Signage on building ext/fascia/billboard	6	1	1	6
Opening hours/other notices	6	10	2	5
Paintwork-walls/window frames	7	5	5	8
Pavement/doorways	8	5	4	8
Access for buggies/disabled	5	1	8	2
Windows/ext window treatments	1	4	6	4
Outdoor seating/equipment	4	2	5	0
Window displays/promotion	0	1	1	4
Ext lighting	5	4	4	4
Overall impression ext/layout/design/landscape	5	2	6	3
Total	50	43	56	52

The study also found that outdoor seating was an area of neglect for many wineries. The average score was 6.9. This was surprising given that, at the time of the survey with the southern hemisphere summer approaching, this was an area that many wineries which depend on outdoors elements to attract visitors could have been expected to have invested in. Given its potential significance in peak visitor periods aesthetic appeal including seating should be prioritised and addressed in winery business plans.

Exterior lighting was also neglected by some wineries and brought the average score down to 6.3, but as many are not open in the evenings that was an aspect given minimal attention by many wineries.

The most dramatic observation made was that less than a quarter of the wineries surveyed paid attention to any form of exterior window display or promotion. This may be in part due to the design of the actual buildings, but also through lack of understanding or skill in this area. Opportunities for promotional product or infor-

mation displays in exterior servicescapes are numerous and could be integrated in business promotional planning. Opportunities noted in this study included outdoor seating areas where promotional information could have been displayed on tables or exterior billboards or windows. Incorporating aesthetically pleasing and subtle promotional displays were apparently ignored due to a general lack of planned display space at most wineries.

With respect to internal presentation of the physical environment, highest scores were assigned to Wither Hills and Pegasus Bay. Lowest scores went to Hinton, Waipara, Torlesse and Huia.

Allan Scott did not rate as highly for

minimalist austere look was prevalent. The average score was only 3.4.

Display of artifacts and awards was also inconsistent across the wineries. Renowned wineries like Pegasus Bay, Wither Hills and St Clair scored 10 marks and prided themselves with almost ostentatious displays of their awards, while others like Cloudy Bay, who are positioned as similar in quality of wine and renown, were not as ambitious to impress and had no awards on display at all. Huia, also another similarly positioned winery only scored 1. However, it is possible that this may also reflect elements of a winery's positioning with respect to awards as well as branding.

Uniform scores varied amongst the

Table 9 Physical Environment: Internal Presentation

Physical Environment: Internal Presentation	Hinton	Waipara	Pegasus Bay	Torlesse	Cloudy Bay	Huia	Wither Hills
Interior design / colour/ style/ furnishings	1	3	10	3	10	4	10
Interior lighting / fixtures and fittings	3	5	10	3	10	7	10
Functional Equipment / cash registers / fridge	5	4	10	6	10	7	10
Clean functioning restrooms	6	3	10	0	10	0	10
Housekeeping standards	4	6	10	6	10	9	10
Merchandising and Product Display	1	1	10	3	10	4	10
Table décor / coverings	2	5	5	3	0	0	10
Point-of-purchase / cellar door area	1	2	10	4	10	5	10
Layout and arrangement of internal floor plan	0	1	10	4	10	6	10
Indoor / outdoor flow	2	7	5	9	10	1	10
Artifacts / collectibles / artwork / photos / awards	1	3	10	3	0	1	10
Total	26	40	100	44	90	44	110

physical internal presentations as they did in their external.

The majority of wineries scored very well on housekeeping standards with an average of 8.2.

One particular forgotten area for most wineries was that of table decoration. Even wineries that had no restaurant or dining facilities still had tables that could have been decorated in some way with branded table talkers, flowers or art pieces. The

wineries from 0 at The Wineshed, Bouldvines, Highcrest and Huia, to impeccable representation at others scoring 10 at Wither Hills, Cloudy Bay, Melton Estate, Kaikoura Winery, Wairau River, Clifford Bay, Framingham, Nautilus, Mahi and Domaine. Matua Valley and Villa Maria scored only 7 and 3. Interestingly, these are large mass production wineries and may be influenced more by their focus on the production concept of marketing rather

than a customer focused marketing concept.

Personal grooming at most of the wineries was of a high standard however it was noted that the presentation of staff at the wine cellar sales counter and restaurant at Highfield had soiled polo shirts and hand wipe marks on their aprons. This particular winery prides itself on its export quality wines and strong branding. Therefore, it was surprising that uniforms and staff presentation should not reflect the desired branding image.

Most wineries scored fairly well with respect to interior and exterior ambient positions. The highest score went to Wither Hills with full marks of 60. The lowest was Hintons with 26.

Most wineries scored well with respect to their labels and wine bottle carriers as well as web pages. There were varied results for branded merchandise and souvenirs. Some wineries such as Matua Valley and St Clair had vast amounts of branded merchandise for sale while others like Hintons had nothing obvious. Results for brochures were very disappointing at the Christchurch wineries. The Wineshed had none and scored 0, Larcomb Wines scored 1, Hintons had none and scored 0. The only Marlborough result for brochures that was disappointing was Matua Valley, scoring 1.

Discussion

As noted in the introduction wine tourism has become an important component of the marketing and business strategies of many wineries in New Zealand (Hall and Mitchell 2008). If visitors are significant target markets for wineries as in the case of the wineries studied for this paper, then the servicescape must be an important consideration of wineries that seek to increase their sales at the cellar door and develop a positive post-visit consumer relationship (Mitchell and Hall 2004, 2006).

First sightings and impression of the winery for tourists should instill the feeling of a positive visitor experience. If the first impression of the winery is one of unkempt car parks, tourists may not perceive the brand as intended by the winery. For example, Pegasus Bay

(www.pegasusbay.com/) presents visitors with artistic creativity, evident in the garden design, the art work on display and the wine itself. The Pegasus Bay Winery web page reinforces its positioning as a professional business which takes food and wine seriously, but the car parks and access are less than desirable. Their overall physical external environment score was only 71, and yet they position themselves professionally. They promote their positioning through various tourism intermediaries on the World Wide Web and are nominated as one of the best wineries in the Canterbury region.

First impressions of the stunning architecture of Wither Hills (www.witherhills.co.nz/) alongside environmental extrinsic cues enhance the perceived image of sophistication and artistic flair. These perceptual cues make a statement about the quality expectation from the moment you set eyes on the building from the road and play a vital role in predicting service quality.

The authors found that being able to predict product quality through extrinsic cues prior to consumption of wine at the wineries was especially important for wine products when quality was difficult to evaluate by customers with little viticultural knowledge (see also Hall and Mitchell 2008). Professional looking wineries that used their servicescape as an opportunity to communicate the quality of the wine produced were perceived as memorable and provided? customer focussed experiences. The servicescapes of these wineries also communicated and invoked invitation through these intrinsic cues which influenced longevity of a visit. For example, Wither Hills invited visitors to view its cellar and immerse themselves in the ambience of the surrounds. Therefore, other visual indicators become part of the evaluation and, in the longer term, relationship process. This supports Wakefield and Blodgett's (1996) hypothesis that "facility aesthetics" are a function of architectural design and that as customers approach or drive by they are likely to evaluate the attractiveness of the exterior. In the case of wineries this is very relevant as customers may not have visited before and if they are

international tourists, may not visit again, yet they will often have opportunities to purchase in the longer term either via mail order or retail outlets and restaurants as well as provide positive word-of-mouth.

The servicescape also needs to consider more than extrinsic cues of the external physical presentation. The internal physical presentation, staff presentation, ambience and merchandise are also important contributors to the overall impression and enduring satisfaction of the winery experience. Internal layout and presentation and the dimensions used to evaluate each winery in this paper provide cues which make statements about the winery business. Newman (2007) argues that spatial factors such as internal layouts can often be more powerful as they can make clear and distinguishing visual statement about expectations of quality and standard.

Newman (2007) draws on the theory of Mehrabian and Russell's (1974) variables of approach and avoidance behaviours. These behaviours may be a consequence of contributing spatial factors such as where customers may feel cramped or exposed, especially where social interaction is important. The personal space allocated for wine tasting at Rossendale (www.rossendale.co.nz/), for example, was non-existent. The sole counter serviced all restaurant, bar and cellar customers. A tasting room separated from the main restaurant dining area would have been advantageous to enable wine enthusiasts to experience a more relaxed servicescape. Having to stand in an entrance-way/point of sale area for the restaurant even though visitors are seeking a tasting does not provide legibility for customers in terms of the servicescape and as Newman (2007) observes, customers may feel coerced into a *stressed* and uncomfortable emotional state. Similarly at Kaikoura Winery (www.kaikourawinery.co.nz/), the layout of the interior did not entice customers to stay; Newman (2007) describes this as having no legibility of space. The seating area was in the way of the main access route to the outdoor viewing area which as Wakefield and Blodgett (1996) hypothesise impacts on accessibility. Also the seating lacked ambient appeal and, perhaps even more importantly, was uncomfortable, with

a consequence of not encouraging customers to return.

Forrest Estate Winery (www.forrest.co.nz/) also had poor legibility where it was difficult to actually open the door and there was no directional extrinsic cues leading or inviting you to the closed door. The internal schematic had no structure or environmental signposts for the eye to follow. Conversely, the spatial design of Nautilus Wines (www.nautilusestate.com/) influenced behaviour on the occasion one of the authors visited. Due to the close spatial environment customers were forced to gather in close proximity to hear about tasting notes from the staff member and to have their tasting glasses filled. The area was cramped and not conducive to comfort or relaxation. This is a significant aspect of servicescape design as Newman (2007) suggests that people's reactions to each other may be determined by spatial factors.

Newman (2007) refers to mood as having an influence on how people evaluate places and situations and that mood states and behaviour may involve associations in memory which tie specific moods to certain types of behaviour. The experience encountered by one of the authors at St Clair Winery (www.saintclair.co.nz/) support this theory and may be influenced by the casual relaxed ambience of the winery which scored a high (59) for interior and exterior ambient conditions. However, Langdales (www.langdalerestaurant.com/home.htm) also scored a high 57 and Highfield Estate (www.highfield.co.nz/) scored 46 but the personnel at the wine cellar counters at both wineries were unfriendly and unwelcoming. As Newman (2007) suggests, the behaviour of contact personnel is likely to contribute significantly to customers' mood states and thereby deciding the outcome of future behaviours toward that winery. Similarly, the service encounter at Forrest Estate and Villa Maria (www.villamaria.co.nz/) were also less than desirable with arrogant and preoccupied staff which encouraged avoidance behaviour

At the other end of the scale, Framingham (www.framingham.co.nz/) ensures their customer service delivery is presented in as polished a manner as is their winery.

In fact they were the friendliest, most professional and engaging of all the wineries, with Wither Hills, Mahi (www.mahi.co.nz/) and St Clair running second equal. Although this paper is not focussing on customer service and the socialscape, it does have an impact on the memory of the servicescape. One of the authors requested some information on the Framingham brand. The staff were delighted to be able to assist and said they would email a newsletter and information on history of the brand. A service promise which was later met. Interestingly, Hall and Mitchell (2005, 2008) found in their research on the impact of the servicescape on the service experience that although bad service experiences may produce negative feelings at the time, these may decline in significance over time while aspects such as the winery vineyard setting, the cellar door and atmosphere will take on a much greater significance over time. They argue that the vineyard, the cellar door facilities and the winery itself may take on more significance in terms of negative recollection. Therefore, wineries should endeavor to plan and manage the servicescape in the long term.

Furthermore, Hall and Mitchell (2005) in their case study on winery visitation and post-visit behaviour discuss the wider temporal context of wineries and in particular that wine itself is a tangible, transportable and durable product that can be experienced in a number of locations before, during and after the on-site winery experience. This supports the inclusion of section E in the servicescape dimensions scores of this paper, which includes the souvenirs, the wine bottle carriers, the newsletters and the wine bottles themselves as they serve to act as reinforcement to the on-site winery servicescape experience. Many tourists can relive the experience of their holiday at home when they take a bottle of wine purchased on their holiday or at the retail store from their fridge or receive their Framingham Newsletter or Cloudy Bay Mentelle Notes in the mail. The servicescape, relationship marketing and reinforcement of brand image may have a more enduring, or at least as enduring, impact on customer post purchase behaviour than the initial consump-

tion of wine at the winery itself (Hall and Mitchell 2008).

Conclusions

This study has identified the significance of the servicescape as a component of wine tourism and wine marketing. A servicescape evaluation framework was developed and utilized in the evaluation of 27 wineries in the Canterbury and Marlborough wine regions of New Zealand. The results support the identification of a continuum of servicescape design with varying degrees of quality. Some wineries had very impressive servicescapes that matched the positioning of the wine quality and price, while others were more enigmatic in their design and market positioning variables. Most of the wineries were largely consistent in their integrated marketing communication (IMC) of branded print material, signage and web page design, while some wineries were outstanding in integrating their brand and image in all elements of their servicescape. Wairau River (www.wairauriverwines.com/) and Wither Hills were good examples of this.

However, in some wineries there were surprising irregularities and inconsistencies identified upon the more detailed assessment using the servicescape framework. These inconsistencies were most notable on variables of physical environment dimensions and perceived market positioning based on price and product quality. Wineries that used a premium based pricing strategy in some cases exhibited servicescape elements which were inconsistent with the higher quality product which was being promoted and their physical environments did not fit well with their claimed market positioning.

The value of the development of such an evaluation framework is not necessarily with respect to the scores themselves. Rather the framework has potential value as a diagnostic tool by which wineries can consider the various factors in the servicescape and make decisions as to how they should be developed in line with their branding and markets. Clearly, different markets – and different cultures – will have differing opinions about what is ap-

appropriate in the winery and cellar door servicescape. Comparative studies are therefore to be encouraged so as to allow further refinement of the evaluation framework particularly with respect to the relative weightings of both empirical and perceptual factors. Nevertheless, it is essential that wineries engaged in cellar door sales and wine tourism seek to pay as much attention to the elements of their servicescape as they do their markets, their brand, and the quality of their wine.

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