Walden University

College of Management and Technology

This is to certify that the doctoral study by

Marie G. Kulesza

has been found to be complete and satisfactory in all respects,
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Abstract

Revenue Management Strategies for Long-Term

Survival of Small-Farm Wineries

by

Marie G. Kulesza

MS, University of Hartford, 1999

BS, Central Connecticut State University, 1982

Doctoral Study Submitted in Partial Fulfillment

of the Requirements for the Degree of

Doctor of Business Administration

Walden University

August 2019

Abstract

Some owners of small-farm wineries have moved to direct and alternative revenue management strategies to generate revenue and create brand awareness because of increased competition and regulatory changes. Research has revealed that owners of small-farm wineries remain financially reliant on direct-to-consumer sales through tasting rooms that represent an estimated 70% of their total revenue generated. This qualitative multiple case study was an exploration of how revenue management decisions of small-farm winery owners may contribute to long-term survival in a regulated industry. Dynamic capabilities concept was the conceptual framework for this study. The study population consisted of 3 small-farm winery owners in Connecticut who have operated a winery with *Connecticut Grown* designation for at least 10 years. Data were collected through semistructured interviews, organizational documents, observation notes, and review of each winery's website. Three themes emerged from data analysis: focus on brand and customer base, constraints consideration, and competitors' impact. The findings and recommendations from this study may further small-farm winery owners' understanding of revenue management strategies they can use to overcome constraint challenges and mitigate competitors' impact. As small-farm winery owners improve profitability and sustain long-term survival, subsequent positive social change, such as small business development and increased employment opportunities, may lead to economic prosperity for the local community and financial stability of community residents.

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Dedication

I dedicate this study to my parents, Sal and Mary Ann Gugliotti, who instilled the value of higher education and the passion for lifelong learning upon me. I also dedicate this study to my daughters, Megan and Heather, for whom I strive daily to be a positive role model. Finally, to my husband John, whose support and great understanding throughout this process was immeasurable. I could not have finished without your steadfast belief in my ability to complete this journey. Thank you!

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First and foremost, I would like to thank Dr. Warren Lesser, my committee chair, for his full support and encouragement. I am greatly appreciative of his constructive critique and his instructional guidance that made this journey a positive experience. I would like to thank my committee members, Dr. Jaime Klein and Dr. Jill Murray, for their invaluable feedback and insightful comments throughout this process. I would like to thank all my academic colleagues who frequently shared their ideas, encouragement, and guidance throughout my doctoral process. I also would like to thank my long-time friends who graciously accepted my extended absence from socializing and enthusiastically celebrated every milestone I reached. The network of academic colleagues and personal friends provided mentorship and support throughout the duration of my doctoral journey.

Finally, I would like to thank the owners of small-farm wineries who participated in the study for giving their valuable time and providing insightful conversations. Because of their open-mindednesses, willingness to share experiences, and passion for winemaking I was able to gather rich data and in-depth insights on successfully operating a small-farm winery despite the challenges from every level. After conducting the research, I developed a deep respect for the hard work and long hours these small-farm winery owners engaged to cultivate and produce quality products, provide an exceptional wine experience for visitors, and contribute positively to local communities.

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Section 1: Foundation of the Study

Small-farm wineries are an emerging segment of the winery population in the United States. Owners of small-farm wineries make valuable contributions to the U.S. agricultural sector and rural economies. In Connecticut, there has been an upsurge of small-farm winery operations. As a result, owners are now operating in an increasingly competitive business environment. Therefore, it is necessary for small-farm winery owners to continually make strategic decisions to gain competitive advantages and promote long-term survival in a regulated industry. In this study, I explored the strategies of successful small-farm winery operations to better understand their perspectives and revenue management strategies.

Background of the Problem

In the United States, over 13,000 bonded wineries existed as of 2018, with winery operations spread across all 50 states (TTB, 2019). Of the total number of U.S. wineries, 92.5% are small wineries with production levels of less than 50,000 cases of wine annually (United States Department of Agriculture National Agricultural Statistics Service [USDA NASS], 2019). Many of the small wineries are located in rural communities and rely on innovative approaches to distribute, market, and sell their wine products to improve economic performance. The wine industry is unpredictable; increased competition, escalating operating costs, unstable prices, and regulatory changes all affect an owner's ability to achieve positive financial performance and long-term survival of their small-farm winery through (Gilinsky, Newton, & Vega, 2016; Golicic, Flint, & Signori, 2016). In the current environment, owners of small-farm wineries face critical decisions for developing revenue management strategies to respond positively to changes in market conditions and regulatory policies (Zatta & Kolisch, 2014).

Revenue management is a sophisticated approach by which managers employ effective capacity, pricing and inventory controls, various distribution channels, and other tactics to optimize revenue (Westermann, 2015; Zatta & Kolisch, 2014). Researchers have studied revenue management strategies used by managers in services industries such as airlines and hospitality (Cetin, Demirciftci, & Bilgihan, 2016; Vinod, 2015). However, few researchers have focused on revenue management strategies in the wine industry, indicating a gap in the literature. Thus, many owners of small-farm wineries lack the insight into which revenue management strategies are successful and which may negatively impact their ability to sustain long-term survival. As a result, I explored the revenue management strategies small-farm winery owners incorporated into their existing business strategies to sustain long-term survival.

Problem Statement

Some owners of small-farm wineries have moved to direct and alternative revenue management strategies to generate revenue and create brand awareness because of increased competition and state-level regulatory changes (Newton, Gilinsky, & Jordan, 2015; Tuck, Gartner, & Appiah, 2016). Research has shown that owners of small-farm wineries remain financially reliant on direct-to-consumer sales through tasting rooms that represent an estimated 70% of their total revenue generated (Byrd, Canziani, Hsieh, Debbage, & Sonmez, 2016; Villanueva & Moscovici, 2016). The general business problem is some owners of small-farm wineries are not expanding revenue management strategies in a regulated industry and are experiencing a decline in revenue. The specific business problem is some owners of small-farm winery operations lack revenue management strategies to promote long-term survival.

Purpose Statement

The purpose of this qualitative multiple case study was to explore the revenue management strategies some owners of small-farm wineries use to promote long-term survival. The targeted population consisted of owners from three small farm wineries designated as *Connecticut Grown* farm wineries by the Connecticut Department of Agriculture. These business owners have continuously farmed and operated profitable small-farm wineries for at least 10 years. Improved insight into successful revenue management strategies may promote positive social change via long-term survival and contribute to the economic prosperity of wineries' employees and the local communities.

Nature of the Study

I used the qualitative research approach to explore the revenue management strategies some owners of small-farm wineries used to promote long-term survival. A qualitative research approach allows investigators to focus on the broad context of an organization and business problem. In addition, qualitative research is typically more flexible, allowing greater adaptation in the interaction between the researcher and the study participant (Antwi & Hamza, 2015). The quantitative research method is appropriate when examining the relationship between variables by measuring and analyzing numerical data through statistical techniques (Cronin, 2014). The mixed-method research approach is the combination of quantitative and qualitative research techniques that researchers apply to address more complicated research questions and develop a deeper theoretical understanding (Landrum & Garza, 2015). In this study, I did not intend to identify the relationship among variables, but rather to gather new insights on the small-farm winery sector, through face-to-face interviews, observations, and archival documents. Therefore, the qualitative approach was a more appropriate research methodology for this study than quantitative and mixed-methods research approaches.

I considered three research designs suitable for a qualitative study on revenue management strategies: (a) phenomenology, (b) narrative, and (c) case study. When using phenomenological design, researchers explore human experiences of a particular group (Marshall & Rossman, 2016). In a narrative design, the researcher preserves chronological connections and the sequencing of events to construct an account of one or two individuals' experiences (Merriam & Tisdell, 2015). I did not select phenomenological or narrative design because I did not seek to understand the lived experiences of participants, but rather I intended to explore strategies that could solve a business problem. Using a multiple case study design, a researcher may more effectively consider the how and why, and obtain details and perspectives concerning a specific situation replicated across more than a single case (Yin, 2018). Therefore, I determined the multiple case study design was appropriate to explore revenue management strategies to promote long-term survival of small-farm wineries in Connecticut.

Research Question

I developed the following research question for this study: What revenue management strategies do successful owners of small-farm winery operations implement to promote long-term survival?

Interview Questions

1. What are the key revenue management strategies that you implemented to promote long-term survival?
2. What factors or information do you take into consideration before making revenue management strategic decisions?
3. How significant is the competitive environment with respect to the revenue management strategic decision-making process?
4. What barriers have you encountered when trying to implement revenue management strategies?
5. How did your implementation of revenue management strategies affect the profitability and long-term survival of your small-farm winery business?
6. What additional information would you like to share regarding revenue management strategies successful owners of small-farm winery operations implement to promote long-term survival?

Conceptual Framework

The dynamic capabilities (DC) framework served as the conceptual framework for this research study. Proponents of DC focus on how the stewards of organizations continually adapt and reconfigure valuable resources to achieve and maintain competitive advantage (Alford & Duan, 2018). Teece and Pisano's (1994) built on resource-based view theory to develop the theory of DC, an approach scholars apply to understanding organizational strategic changes. Teece, Pisano, and Shuen (1997) continued to develop DC to explain *how* and *why* certain business leaders proactively engage in sustainable development opportunities. In accordance with the DC, Teece et al. (1997) characterized capabilities as discrete internal processes and routines within an organization rather than engagement in extemporaneous activities to address external changes. Hence, theorists established that by means of DC, decision-makers could improve responsiveness to environmental changes through persistent and repeatable adjustments of an organization's resource base.

Teece (2007) extended the DC framework by disaggregating capabilities into three broad categories: (a) sensing capabilities, (c) seizing capabilities, and (c) transforming capabilities. Moreover, a managers ability to sense, seize, and transform is an important DC (Teece, 2007). Researchers determined that to engage in sustainable development strategies, business leaders must develop DC that allow the simultaneous and continuous creation, absorption and integration of knowledge (Nieves & Haller, 2014; Ou, Hsu, & Ou, 2015; Savino, Petruzzelli, & Albino, 2017). The DC framework was appropriate for this study to demonstrate how owners of small-farm wineries recognized opportunities, developed revenue management strategies, and deployed and reconfigured resources to promote long-term survival.

Operational Definitions

Agritourism: Agricultural-based activities for recreational, entertainment, or educational purposed that provide consumers with opportunities to further expand their farming experience (Govindasamy & Kelley, 2014).

Direct-to-consumer: Product distribution and sales channel by which business operators can sell products directly to consumers at retail prices, bypassing normal distribution channels (Elias, 2015).

On-farm diversification: The process involving the development of new resource-based ventures outside the core agricultural activities of an enterprise (Ferguson & Hansson, 2015).

Revenue management: Management strategy aimed to maximize revenue through pricing techniques and effectual allocation of inventory to influence consumer demand for a product or service (Huefner, 2015).

Small-farm winery: In Connecticut , a place or premise, located on a farm in the state that does not produce and sell more than 100,000 gallons of wine per year (Conn. Gen. Stat. §08-187, 2008).

Three-tier regulatory system: Mandatory distribution systems in which producers of alcoholic beverages sell their product to state-licensed wholesalers who distribute to licensed retailers for resale to consumers (Santiago & Sykuta, 2016).

Wine club: An agreement between a winery and consumer in which the consumer commits to purchase a specific quantity of wine on a regular basis as well as receive other member benefits such as access to new release, discount purchases, and free tastings (Newton, Nowak, & Kelkar, 2018).

Wine tourism: Consumers' visitations to vineyards and wineries when wine tasting or to participate in wine-related activities are the prime motivating factors for visitors (Byrd et al., 2016).

Assumptions, Limitations, and Delimitations

Assumptions

Assumptions are underlying perspectives considered true by the researcher but that are not verifiable facts (Kirkwood & Price, 2015; Lips-Wiersma & Mills, 2014). Researchers identify key assumptions to explain and frame their research study and preclude potential misrepresentation of the study's outcome. I have pinpointed three assumptions central to this study. The first assumption was that the participants comprehended the definitions and terms while providing thoughtful and genuine responses. Second, I assumed the qualitative method was the appropriate method to explore revenue management strategies to promote long-term survival of small-farm wineries in Connecticut. The third assumption was the participants were a representative sample of small-farm wineries in the geographical area.

Limitations

Limitations are potential weaknesses or shortcomings of a study that may adversely affect the researcher's ability to establish the validity of the conclusions (Brutus, Aguinis, & Wassmer, 2013). Study participants, location, and time are the foremost limitations of this multiple case study. The participants in this study were three owners managing small-farm wineries located in Connecticut who may not have been an exhaustive representation of every small-farm winery in the geographical area. I limited the scope of the study due to time constraints and limited ability to reach geographically dispersed respondents. Finally, respondents may have feared lack of confidentiality and therefore did not share the full extent of business decisions or shared experiences about failure or success of their business.

Delimitations

Delimitations are restrictions or boundaries researchers impose to narrow the scope of the study, such as use of purposeful sampling (Lips-Wiersma & Mills, 2014). The restrictions or boundaries may also limit other researchers' abilities to generalize the study results to different respondents, settings, or populations (Lips-Wiersma & Mills, 2014). The current study involved interviews with selected owners of small-farm wineries located in Connecticut that may not have proved generalizable to small-farm wineries in other states.

Significance of the Study

The small-farm winery sector is flourishing in Connecticut. A significant contribution to the growth of small-farm wineries in Connecticut was the establishment of the Connecticut Farm Wine Development Council with the purpose to promote state wines through marketing, promotional, educational, and research activities (DOAG, 2019). Currently, small-farm wineries in Connecticut confront business constraints from increased competition, high operational costs, and federal and regulatory issues. Owners of small-farm wineries are under pressure to adopt strategies to mitigate the negative impacts of business constraints and enhance long-term survival.

Contribution to Business Practice

Growing vines and operating a winery requires large capital investment and is a labor-intensive process. Winemaking is a complicated and arduous process requiring diverse skills and technical knowledge acquired over time (Duarte Alonso & Bressan, 2016). Owners of small-farm wineries need to be flexible and adapt harvesting and internal processes, as well as marketing approaches to maximize wine production and sales. Many factors have potential influences on the efficient and innovative efforts by owners of small-farm wineries.

Recent literature on small-farm wineries has focused on developing new methods of reaching and retaining customer, such as agritourism (Govindasamy & Kelley, 2014). Because of economic, social, and regulatory influences, adoption of strategic management practices is crucial to sustain profitable operations. The purpose of this qualitative multiple case study was to explore the revenue management strategies some owners of small-farm wineries operations used to increase profits and promote sustainability. The potential insight obtained from this study may provide owners of small-farm wineries in Connecticut with an understanding of how significant successful revenue management strategies are to business sustainability. The findings could also lead to additional knowledge for winery owners to make more informed strategic decisions to sustain long-term survival.

Implications for Social Change

This study may lead to positive social change by equipping owners with information on revenue management strategies needed to sustain a wine enterprise and create opportunities to improve the local economy. Owners of small-farm wineries grow, produce, and sell products in one location, generating economic contributions to local communities. Successful owners of small-farm winery operations can provide jobs for rural communities, which can help stabilize a local community as well as other proximal businesses. The economic development of rural communities could lead to financial stability for community residents that can improve residents' economic, emotional, and psychological well-being.

A Review of the Professional and Academic Literature

In this qualitative study, I explored revenue management strategies some owners of small-farm wineries use to sustain long-term survival. The literature review was foundational to my understanding of this business problem. It included a detailed review of information related to the historical and regulatory aspects of the wine industry, business strategies, wine products and services, and consumer behavior. Through critical analysis and synthesis of the literature, researchers develop a body of knowledge to explain and justify the research topic and provide the context and theoretical framework for their research relating to business strategies and the application by small businesses (Hart, 2001). Therefore, my intent with the literature review was to study and synthesize current literature related to the research topic to identify knowledge gaps and illustrate the justification to the research aim.

The literature review consisted of peer-reviewed articles, authoritative books, and dissertations relating to the topics of winery operations in the United States, DC framework, and revenue management practices. The research designs of selected literature included both quantitative and qualitative research methods. The primary databases I utilized in this literature review included ProQuest, ABI/INFORMS Global, Google Scholar, and Walden University online library resources. I searched for key terms that included *small-farms*, *winery operations, distribution channels, regulation, customer behavior, dynamic capabilities,* and *revenue management strategies.* In Table 1, I present a summary of the sources of data for the references in the literature review.

Table 1

Source of Data for Literature Review

Publications	Published within 5 years of expected graduation date	Older than 5 years	Total	% of sources
Peer-reviewed journals	85	18	103	89.6%
Government reports/websites	6	2	8	6.9%
Others	3	1	4	3.5%
Total sources	94	21	115	100.0%
% of sources	81.7%	18.3%	100.0%	

The three major sections within this literature review are (a) the research framework, (b) overview of winery operations, and (c) revenue management. The research framework section includes an exploration of the DC framework as well as alternative conceptual frameworks. The overview of winery operations section encompasses the economic performance of small-farms, winery operations, and regulatory issues affecting small-farm winery operations. Finally, in the revenue management section, I provide a critical analysis and synthesis of the literature related to revenue management strategies.

Research Framework

The conceptual framework for this study was the DC-based view. Teece et al. (1997) outlined the DC framework based on the premise that capabilities not only vary across business enterprises, but the differences are the result of management choices. The theorists defined DC as a firm's ability to transform resources, processes, and capabilities at its disposal to address rapidly changing environments (Teece et al., 1997). *Dynamic* alone refers to the capacity to reconfigure the firm's resources and processes to adapt to changing business environments, while *capabilities* refer to the strategic management of a firm's assets to seize opportunities and sustain a competitive advantage (Teece, 2018b). The DC framework emphasizes the critical role of managerial capabilities rather than firm resources.

Teece and Pisano (1994) and Teece et al. (1997) conjectured that firm level differences in capabilities were framed by pre-existing asset positions, processes for reconfiguration, and paths for capability creation. Researchers indicated that possession of assets alone could not lead to sustained competitive advantage when the business environment is constantly changing (Kim, Song, & Triche, 2015; Koryak et al., 2015; Shuen, Feiler, & Teece, 2014). Business leaders who have the managerial capabilities and operational processes to dynamically leverage firm assets could successfully adapt and respond to new business conditions. Figure 1 below depicts the relationship between asset positions, processes, and paths and how they influence competitive outcomes.

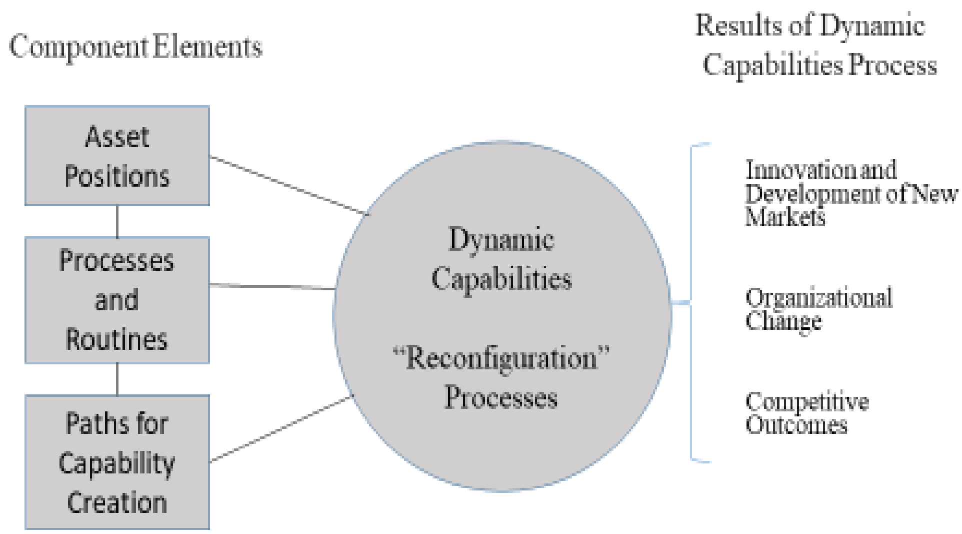

Figure 1. The dynamic capabilities framework. Adapted from "Dynamic Capabilities: What Are They and How to Identify Them?" by D. S. Meirelles & A. A. B Camargo, 2014, *Revista de Administracão Contemporânea*, *18*, p. 58. Reprinted with permission.

Teece (2007) furthered the research, postulating that DC are strategic processes centered on sensing, seizing, and transforming. Ordinary capabilities are routines that firm operators employ to produce and sell existing products or services (Teece, 2018b). However, over time ordinary capabilities become easily imitable and no longer critical to competitive advantage (Teece, 2018a). DC are higher level capabilities that are difficult to replicate and critical for a sustained competitive advantage. Building DC, firm leaders could enhance their competitive strategies in different situations.

Managers who dynamically leverage capabilities could improve functional competence under trying conditions. In practice, Nair, Rustambekov, McShane, and

Fainshmidt (2014) found firms with DC in emergency risk management (ERM) were able to mitigate downswings in stock price with no significant impact on firm profitability. During the upturn following a crisis, firms with superior ERM experienced an increase in risk by investors and profitability (Nair, Rustambekov, McShane, & Fainshmidt, 2014). The results indicated that DC such as ERM impact different firm metrics (i.e., stock price and profitability) in both downturn and upswing of environmental change.

For companies to sustain a competitive advantage in an ever-changing business environment, they must have the ability to change or develop new capabilities. Hansen and Moller (2016) addressed the need for developing DC at the operational level in a longitudinal in-depth case study of a medical device manufacturer's lean production practices. The study findings showed that the company developed DC over time with initial improvements happening as a reaction to an event, then further through the coherence between operational level activities and improvement system with DC (Hansen & Moller, 2016). Hence, business leaders can create and strengthen DC by combining strategic resources and reformulate processes.

The recent trend in human resource processes within the technology sector led to a study in aqui-hiring practices by technology companies. Chatterji and Patro (2014) applied the DC framework to explore how acqui-hiring related to broad strategic management of human capital to sustain competitive advantage. Chatterji and Patro discovered that when sensing an opportunity, Google and Facebook reconfigured their human resource processes to acquire diverse technology, talent, and intellectual property to seize the opportunity to improve existing products and create new products.

By utilizing DCs, managers can foster process agility to maintain competitive advantage and strengthen firm performance.

Researchers have shown the relationship of DC, process agility, and firm performance. Raman and Bharadwaj (2017) developed a scale to measure agile service using DC and discovered that achievement of agile services was possible by a firm leveraging the eight dimensions of DC. Gligor, Esmark, and Holcomb (2015) discovered supply chain agility as a DC that had a significant impact on cost efficiency and customer effectiveness across various operating environments. The results of these studies indicated that it is beneficial for organizational managers to develop agile capabilities to cope with changes in customer demand and shift in business environments for competitive advantage. Similar to other organizations, managers of family-owned firms need to leverage the development of DC.

Family-owned enterprises possess distinct assets and resources that contribute to the long-term survival of the business. In a single case study, Jones, Ghobadian, O'Regan, and Antcliff (2013) drew on the theory of DC to examine a long-standing family business to establish the links between multi-generational ownership, entrepreneurial cognition, and DC. The researchers identified vital DC associated with success as (a) leveraging existing resources, (b) creating new resources, (c) accessing external resources, and (d) release of underperforming assets (Jones, Ghobadian, O'Regan, & Antcliff, 2013). The breadth and depth of knowledge that operators of family-owned firms gain over the years is a unique resource.

Alternative Conceptual Frameworks

Alternative conceptual frameworks include the resource-based view (RBV) and knowledge-based view (KBV) of a firm. Researchers such as Rua and Franca (2015) and Jeon, Dant, and Baker (2016) have used these conceptual frameworks to explore how resources and knowledge of an organization supports sustainable competitive advantage. The following is a discussion of the two alternative conceptual frameworks and my rationale for selecting the DC framework for this study.

Resource-based view. The RBV, originating as a new strategic management theory from Wernerfelt (1984), Prahalad and Hamel (1990), and Barney (1991), offered new insight into the use of a firm's resources to gain competitive advantage. Barney posited that business leaders could achieve competitive advantage from firm-specific resources and capabilities to the extent that they are valuable, rare, imperfectly imitable, and non-substitutable. Further, theorists expounded that RBV has an internal focus with an emphasis on strategic choices in leveraging firm-specific resources and capabilities to influence competitiveness and firm performance (Barney, 1991; Wernerfelt, 1984). Thus, scholars of RBV regard a firm's unique resources and capabilities as the primary drivers of competitive advantage and better organizational performance.

According to Barney (1991), the underlying assumption of RBV is businesses within the same industry that are exposed to the same external forces, achieve different economic performance because of the firm's unique resources and capabilities acquired over time. Consequently, practitioners of RBV should focus on identifying, controlling, and leveraging resources that capture associated rents, impede external threats, and develop competitive advantage (Kazlauskaitė, Autio, Gelbūda, & Šarapovas, 2015). Miao, Coombs, Qian, and Sirmon (2017) employed meta-analysis and found a significant relationship between organization resources and manager's mobilization of resources, and firm performance. Samad, Aziz, Jaidi, and Masoud (2016) acknowledged the relevance of the RBV in their study of small and medium enterprises in the processed food industry. The study findings revealed that high financial capacity and strong quality relationships with stakeholders had a positive influence on a firm's competitive advantage (Samad, Aziz, Jaidi, & Masoud, 2016).

Some researchers criticized RBV because of the static and redundant nature of the core tenets and failure to account for the potential influence of organizational actions on resources over time (Bromiley & Rau, 2016; Hitt, Xu, & Carnes, 2016; Kaufman, 2015). Other critics suggested that a firm's resources diminish in value or relevance over time thus business leaders are constrained by the current resources specific to their business environment (Kazlauskaitė et al., 2015). While managers could exploit resources to generate value, the isolating mechanisms of RBV may limit a firm's flexibility for future resource configuration in response to environmental conditions. Owners of small-farm wineries may experience resource constraints hampering their ability for strategic reconfiguration to sustain long-term survival.

Competitive advantage does not stem solely from unique resources but also business leaders' distinct capabilities in analyzing and managing such resources. An essential challenge for owners of small-farm wineries is balancing resource allocation to explore new strategies with the exploitation of existing resources and capabilities to maintain a competitive advantage over time (Mejri, MacVaugh, & Tsagdis, 2018). Owners of small-farm wineries operate in a dynamic environment interacting with external forces such as regulatory policies, shifting consumer behaviors, and sources of competition. Under RBV, theorists emphasize the prominence of the internal resources of an enterprise while disregarding the impact of external factors on firm performance (Yang, Xun, & He, 2015). The RBV did not align with this study because of the static nature of the theory. Therefore, DC was a more appropriate conceptual framework for me to explore revenue management strategies small-farm winery owners use when responding to changes in regulatory policies, customer behavior, and market competitors.

Knowledge-based view. Another useful theory I considered was KBV of a firm, an extension of RBV. Scholars deemed the central premise of KBV of a firm to be the interdependence between existing specialized knowledge and strategic application of such knowledge to achieve competitive advantage (Dayan, Heisig, & Matos, 2017; DeCarolis & Deeds, 1999; Grant, 1996). Grant (1996) posited knowledge creation takes place at the individual level and the primary role of management is to integrate strategically new and existing knowledge to products and services. Thus, knowledge and capacity to create knowledge are strategically significant resources of an organization.

Proponents of KBV emphasized intellectual assets, expertise, and internal processes, or tacit knowledge, as primary sources of competitive advantage because they are difficult to imitate and socially complex (Barkat & Beh, 2018). Researchers purposed a connection of knowledge with actions, created and leveraged within the context of on-going organizational activities (Dayan et al., 2017; Zahra, 2015). Hence, knowledge is embedded in continuous social interactions at different levels of an organization. Business leaders need to have the capacity to use knowledge organization members acquire and subsequently interpret and share knowledge as a strategic resource.

The concepts of KBV imply that business leaders could sustain their competitiveness and sustain long-term business survival through enlarging organizational knowledge. Nieves, Quintana, and Osorio (2016) found in-depth knowledge about an organization's process and activities fostered coordination of tasks, resources, and activities that improved the effectiveness and productivity in hotel firms. Conversely, Schoenherr and Swink (2015) posited knowledge itself is inadequate until business leaders apply the knowledge to allocate resources astutely to yield competitive advantage. The knowledge process continually evolves in response to the changing external environment but only creates value therefore strategic management of acquired knowledge.

However, researchers hold contradictory assertions about the influence of organizational knowledge on managers' ability to detect, interpret, and seize opportunities in a changing environment. While proponents of KBV focus narrowly on knowledge-related resources, opponents posited that without sufficient synthesis and utilization efforts managers could fail to advance a firm's competitiveness (Forés & Camisón, 2016; Ozkaya, Droge, Hult, Calantone, & Ozkaya, 2015). Accordingly, managements' use and reconfiguration of critical resources such as organizational knowledge to make sense and seize opportunities to develop, new strategies and businesses are essential to improve firm performance. Consequently, I selected DC as the conceptual framework for this study to help me explain and document the capabilities and resources that enable some owners of small-farm wineries to sustain long-term survival from successful revenue management strategies.

Small-Farm Winery Operations

Grape farming and wine production are an integral part of the U.S. agricultural sector and economy. Grape production is the 10th largest agricultural commodity (USDA, NASS, 2017) in the U.S. and the U.S. wine industry is the 4th largest producer of wine in the world (Wine Institute, 2017). According to the U.S. Department of Agriculture [USDA] National Agriculture Statistical Service [NASS] statistical report (2017), in 2016 the U.S. farmers produced over 7.6 million tons of wine grapes. Small-farm winery operations contribute significantly to the U.S. agricultural sector, and the impact continues to grow.

Although large, well-established wineries in California dominate the U.S. wine industry, small-farm wineries are steadily emerging with at least one winery in every state. Researchers discovered that over the last two decades there has been over a triple-digit percentage growth in small-farm wineries in some U.S. states including Washington, Oregon, and New York (Lee & Gartner, 2015; Lim, 2017; Tuck et al., 2016). Likewise, Connecticut’s wine industry has gained momentum with 41 licensed wineries operating in the state (DOAG, 2019). Since many of these wineries are small in size, the competitive forces affect how owners produce, market, and sell wine product to be profitable and sustain long-term survival.

While the impact of grape farming and wine production on the agricultural sector is noteworthy, grape producers contend with many of the same challenges as other agricultural producers that affect the economic success and sustainability of their respective enterprises. Agricultural enterprises are very capital-intensive operations with rising cost of land and heavy financial investment in equipment and warehousing and storage space (Glover & Reay, 2015; Visser, 2017). Further, researchers have found some winery owners make a substantial capital investment in tasting rooms and retail space to attract visitors and promote direct-to-consumer sales (West & Taplin, 2016). Despite the extensive capital investments, agricultural producers, as well as small-farm winery owners face a level of economic uncertainty because of internal and external factors.

Farm size has a significant impact on the production level. Under the USDA, NASS (2017), a small-farm comprises less than 179 acres or generates $50,000 or less in gross revenue per year. Moreover, small-farm winery owners are concerned with federal and state regulations on the minimum in-state fruit requirements (Lee & Gartner, 2015; Reynolds & Knowles, 2014). To meet minimum in-state fruit requirements, owners may need to purchase grapes from external growers or reduce production level. Lee and Gartner (2015) discovered that a higher minimum in-state fruit content requirement negatively correlated with winery revenue levels. Owners of small-farm wineries could expand acreage to meet the requirements, but it takes additional capital and time to produce a vintage.

Agricultural crop production takes place over an extended period that delays the revenue stream. Jablonski, McFadden, Sullins, and Curtis (2017) contended that owners generated most farm revenue around harvest, with assets and other resources underutilized for the remaining portion of the year. Further, West, and Taplin (2016) noted that the timeframe from initial grape planting to producing wine could delay revenue stream by 3 to 5 years. Hence, small-farm winery owners could support long-term sustainability through farm diversification.

On-farm diversification and agritourism. Farm owners diversify farm activities to mitigate the negative impacts of seasonal demand and generate income. Researchers found that some farm managers pursued two forms of diversification: farm diversification and agriculture enterprises diversification (Ferguson & Hansson, 2015; Poláková, Moulis, Koláckova, & Tichá, 2016). Farm diversification includes non-agricultural on-farm activities such as retail outlets, facilities rental, or tours and educational events while diversification of agriculture enterprises encompasses new product and by-product development (Morris, Henley, & Dowell, 2017; Poláková et al., 2016). Through reallocation and recombination of existing farm resources, farm owners can establish new or complementary activities to improve profitability. On-farm diversification can prove beneficial particularly to niche markets such as small-farm wineries.

Similarly, small-farm winery owners approach the challenge of high start-up costs, delayed wine production, and initial low rates of return through diversification. Many owners operate tasting rooms and retail outlets to promote direct-to-consumer sales (Byrd et al., 2016; Tuck et al., 2016; Villanueva & Moscovici, 2016). To further build resilience, researchers discovered that some small-farm wineries owners engaged in peripheral non-agricultural hospitality-related services such as weddings and corporate meetings (Tuck et al., 2016; Veeck, Hallett, Che, & Veeck, 2016). Due to the presence of consumers on farm and wineries, owners benefit financially; consequently, owners continue to search for new opportunities to bring in additional income. Hence, farmers continually sought out valuable opportunities and began considering agritourism.

Agritourism development is a recent phenomenon in the U.S. that farm operators have capitalized on with the purpose of attracting visitors and supporting additional revenue streams. The USDA 2017 Census of Agriculture (2019) indicated that over 38,000 US farms were participating in some form of agritourism with $949,323 in total revenue from non-product related activities, an increase of 35% from 2012. According to researchers, the motivation behind farm owners' decision to adopt agritourism activities centered on financial strains because of rising production costs, weak commodity prices, increased competition, and regulatory constraints (Lucha, Ferreira, Walker, & Groover, 2016; Veeck et al., 2016; Yeboah, Owens, Bynum, & Okafor, 2017). Farm owners are under pressure to expand revenue-generating activities to diversify revenue streams, supplement income, and provide complete utilization of resources. Small-farm winery owners see the potential opportunity to attract visitors and generate additional income.

Wine tourism complements the primary wine producing and selling activity. Researchers noted that many owners of small-farm wineries operate in rural geographical areas and tourists do not travel to a winery solely based on the presence of a winery or wine products (Byrd et al., 2016; Liang & Dunn, 2016; Van Sandt & McFadden, 2016; Villanueva & Moscovici, 2016). Therefore, winery owners integrate activities and attractions that link the wine and winery production to wine tourists' experience to build customer loyalty and stimulate wine purchases. Exploring first-time and repeat visitors' primary motivation to visit North Carolina wineries, Stoddard and Clopton (2015) discovered that purchasing wine was the motivation for the majority of repeat visitors; conversely, a large proportion of first-time visitors' primarily motivation was to participate in wine tourism activities solely. Accordingly, small-farm winery owners need to maximize the visitation experience for winery visitors to introduce their wine products to first-time visitors and to reinforce the relationship with repeat visitors to promote long-term survival. While diversification of services and added-value activities could enhance the operations of farms and small-farm wineries, potential risks and barriers exist for owners.

Agritourism is an achievable business venture, but farm owners must manage associated risks to gain economic benefits. As researchers pointed out, owners adding new dimensions to their enterprises must commit time, capital, and other resources thus diverting these resources away from their core agricultural business that could negatively impact farm operations (Liang & Dunn, 2016; Ullah, Shivakoti, Zulfiqar, & Kamran, 2016; Veeck et al., 2016). If the agritourism operations fail to provide a positive rate of return on resource investments, farm owners risk becoming less economically viable as an agricultural business. Further, owners of small-farms that implement agritourism activities increase their exposure to liability because of the nature of the added operations and upturn in visitors on farm property (Liang & Dunn, 2016). Although these business risks could offset potential revenue gains, particular barriers could further diminish the potential positive financial impact of agritourism activities.

Farmers and small-farm winery owners must develop strategies for overcoming unavoidable barriers to sustain agritourism development. According to Liang and Dunn (2016), farm operators identified access to capital and access to labor as the major barriers to expansion in agritourism activities. Farm owners may pursue less profitable ventures or show reluctance to develop non-agricultural activities because of their inability to obtain and afford initial capital costs and skilled labor. For small-farm winery owners, regulatory policies related to wine tourism are an additional barrier.

The small-farmer winery operator must comply with all state permit requirements as well as municipal zoning codes in regard to agritourism activities. Schilling and Sullivan (2014) reported that as agritoursim enterprises evolved and grew in scale, in addition to holding a state permit to operate a winery, owners needed to obtain special permits to conduct non-agricultural activities under state statutes that became more restrictive and financially burdensome. Consequently, small-farm winery owners often must redirect their focus from actual production of wine to regulatory compliance related to agritourism activities. Boncinelli, Bartolini, Casini, and Brunori (2016) discovered an adverse effect on farm owners' diversification decisions because of zoning regulations limiting the number of on-farm non-agricultural activities each year and capacity caps. Owners of small-farm wineries should maintain a balanced perspective in the selling of the wine they produce and involvement in wine tourism activities.

Winery managers must review tourism strategies to ensure activities are not only financially viable but effective tactics to increase sales. To gain competitive advantage, researched discovered that owners of small-farm wineries had the capacity for resilience through the integration of wine tourism practices into management strategies (Conz, Denicolai, & Zucchella, 2015; Duarte Alonso & Bressan, 2016; Golicic et al., 2016; Veeck et al, 2016). For small-farm wineries, wine tourism provides opportunities to strengthen customer loyalty that can lead to repeat visits, wine club memberships, and post-visit wine purchases. To reach potential consumers and increase wine purchases, small-farm winery owners need to adopt a variety of distribution channels.

Distribution for winery enterprises. As an outcome of the Prohibition Era, a three-tier regulatory system became the major structure for distribution and sale of alcoholic beverages in the U.S. Under the three-tier regulatory system, producers were required to sell their alcoholic products to state-licensed wholesale distributors who then distributed the products to licensed retailers for resale to consumers (Santiago & Sykuta, 2016). While the three-tier system allowed wholesalers to be an important conduit on marketing trends and product information, many owners of small-farm wineries were unable to use wholesalers because of low product volume (Elias, 2015). Further, the surge of wineries in the U.S. had increased dramatically while the number of distributors decreased by nearly 90% limiting the ability for owners of small-farm wineries to obtain wholesale representation (Santiago & Sykuta, 2016). Such constraints had a negative impact on profit margins of wine sales. As a result, owners of small-farm wineries turned to direct-to-consumer sales approach.

The direct-to-consumer sales are more profitable and becoming the predominant approach small-farm winery owners utilize to market and sell wine products. Researchers concluded that direct-to-consumer sales represented 60% of overall winery sales for U.S.

wineries (McMillan, 2017). In a study by Tuck, Gartner, and Appiah (2016), the researchers reported similar results for small-scale producers in the northern U.S. where 57% of all winery sales were through direct-to-consumer efforts. Owners of small-farm wineries drive direct-to-consumer sales through tasting room operations, wine club members, and online sales.

Owners and operators of small-farm wineries increasingly rely on tasting room activities to introduce and market their wine products to consumers and promote the sale of their wine products. As noted by Sun, Gómez, Chaddad, and Ross (2014), tasting rooms are a high-margin, low-volume distribution channel and contribute to brand recognition. Since consumers can taste the wine before purchase, the tasting room experience has a significant influence on consumer purchasing behavior (Byrd et al., 2016; Duarte Alonso, Bressan, O'Shea, & Krajsic, 2015; Marlowe, Brown, & Zheng, 2016). Tasting rooms operations not only serve as retail sales settings but also paths for other direct-to-consumer sales opportunities.

Wine clubs are an alternative low-cost distribution channel operators of small-farm wineries utilize to expand their customer bases and simulate sales growth. Bruwer, Lockshin, Saliba, and Hirche (2015) found from their survey of winery visitors that wine club members' purchases exceeded that of non-club members. Through the purchase commitment of wine club members, small-farm winery owners could predict sales level and allocate inventory accordingly to enhance financial performance (Taplin, 2015; Williamson & Bhadury, 2014). Wine club members represent a small segment of wine consumers and there is a high attrition rate. To generate sales and increase club membership, small-farm wineries owners need to continually attract winery visitors to increase product exposure and stimulate wine sales. However, Newton, Nowak, and Kelkar (2018) postulated that a winery location and travel distance could be a deterrent for visitors, therefore winery managers need to take a different approach to convert one-time visitors into repeat customers.

With the advent of *e*-commerce and Internet marketing, small-scale producers began to explore online sales to overcome geographical location obstacles. Thach, Olsen, and Lease (2014) researched *e*-commerce practices of U.S. wineries and concluded that 82% of wineries sold wine online which represented 12% of total revenue for the winery. The online platform has considerable potential for winery owners to broaden the customer base of a winery and promote reoccurring purchases after winery visits thus increasing sales. Nevertheless, some small-farm winery owners do not incorporate *e*-commerce as a distribution channel due to complex industry regulations.

As *e*-commerce continued to grow, regulations by federal and state evolved. State legislators imposed strict regulatory policies regarding shipment of alcoholic beverages direct-to-consumers within its borders (Elias, 2015). In the 2005 landmark case of *Granholm v. Heald* (544 U.S. 460, 2005), the Supreme Court ruled in-state wineries and out-of-state wineries must be treated equally in regard to shipping directly to consumers without the use of wholesalers (Newton et al., 2015). While aspects of federal regulations appear to reduce the role of intermediaries and ease geographical boundaries for small-farm winery operations, operators must consider federal and state regulatory policies when deciding on sales and distribution strategies.

Sale and distribution regulations. Since wine is an alcoholic beverage, owners of small-farm wineries must abide by a unique system of federal and state laws related to the sale and distribution of wine products. Under the *Federal Alcohol Administration Act*, winery owners are required to obtain the necessary permit to engage in the business of production, sales, and distribution of alcoholic beverages including wine (U.S.C. §203, 2016). Furthermore, consumers are allowed to ship wine interstate when they purchase wine products during a winery visit and the purchases are in compliance with state-specific regulations (27 U.S.C.§203, 2016). State legislators have enacted numerous limitations that impact small-farm winery owners' abilities to sell and distribute their wine products. Such state limitations include requiring specific annual license requirements, limit on days and hours of operations, and restrictions on the serving and selling wine for consumption on premises (Reynolds & Knowles, 2014; Santiago & Sykuta, 2016). Winery owners face comparable regulatory obstacles related to online sales and efforts to gain access to additional markets.

Although there is a growing consumer preference for online purchasing, small-farm winery owners find state shipping regulations, presence of more sellers, and additional transaction costs are deterrents from the online sales channel. Currently, legislators in more than 40 states have enacted laws that allow shipment of online sales from out-of-state wineries directly to consumers (Maisch & Roach, 2019). Wine producers and transporters must be in compliance with state-specific licensing systems of each state, to which they sell and ship wine. Owners could find compliance with each state's annual shipping permits, and compliance with level and frequency of shipments to be a time consuming, tedious, and costly process. Furthermore, legislation in some states, such as Rhode Island, require consumers to place shipping orders on premise at the winery (Richard, Gergaud, Ho, & Livat, 2017). Given the complexity of multiple state-specific shipping laws and the costs of compliance, winery owners may choose to forego out-of-state shipping thus eliminating a primary source of sales.

Similar to other states, owners of wineries located in Connecticut operate under a complex licensing system. Small-farm winery operators are required to hold a manufacturer permit as well as an in-state transporter permit to distribute and sell wine products at the retail level directly to consumers (Conn. Gen. Stat. §30-16, 2017 as amended; Conn. Gen. Stat. §30-19(f), 2015). Further, owners holding such permits are allowed to offer to winery visitors wine tastings and sell wine for on- or off-premises consumption within certain operating timeframes (Conn. Gen. Stat. §30-16(a), 2014). Hence, winery owners can circumvent the three-tier distribution system and increase profits. However, licensed permittees cannot ship more than five gallons of wine in any 2-month period to any one consumer within the state borders (Conn. Gen. Stat. §30-19(f), 2015). For small-farm winery owners, pursing *e*-commerce could be costly and distract focus away from more financially viable distribution channels.

The number of interstate wine sale competitors has increased due to *e*-commerce markets. Golicic, Flint, and Signori (2016) pointed out by obtaining resources and developing capabilities, small-farm winery owners could not only counteract the complexity of regulatory policies but also contend with increased competition. Wine is a luxury product; thus, the number of competitors and regional accessibility could influence consumers' willingness to pay. Hence, wine producers should develop various pricing strategies considering the effects of the alternative distribution channels.

The literature provides a detailed perspective on the many opportunities small-farm winery operators could pursue to attract potential customers and exploit distribution channels. An owners' inability to determine the appropriate product allocation to the multiple distribution channels and development of effective pricing strategies that maximize profits may impede long-term survival (Noone, 2016; Santiago & Sykuta, 2016). Revenue management strategy is a business strategy mangers utilize for better management of price and inventory. With laudable results in the airline and hotel industries, managers in other industries have recognized the potential of revenue management and adopted revenue management practices to optimize financial performance (Cetin et al., 2016; Li & Pang, 2017; Rieger, 2015). Thus, owners of small-farm wineries who implement RM strategies successfully could facilitate effective responses to changes in consumer behavior, market conditions, and regulatory policies.

Revenue Management

Revenue management is a sophisticated approach by which managers may optimize both revenues and profits. Researchers claimed that by employing effective capacity, pricing, and inventory controls, various distribution channels, and other tactics, managers could mitigate the impact of competitions and yield higher revenue growth (Westermann, 2015; Zatta & Kolisch, 2014). For example, airline managers began utilizing RM strategies in the early 1980s to compete with new low-cost airline entrants

(Vinod, 2015). Managers implemented several pricing techniques to sell airline seats that otherwise were expected to be empty at no additional cost to the airline thus increasing profits. Bujisic, Hutchinson, and Bilgihan (2014) claimed that the success in the airline industry led to the expansion of revenue management practices into the hotel, entertainment, leisure, and tourism industries.

Organizational leaders that have adopted revenue management techniques operate enterprises that share fundamental characteristics. Revenue management techniques are mostly applicable to businesses characterized by fixed and perishable inventory, fluctuating demand, low sales costs with high production costs, the existence of market segmentation, and ability to sell inventory in advance (Kimes & Wirtz, 2013). Researchers have pointed out the benefits of applying revenue management techniques for processing enterprises, (Zatta & Kolisch, 2014), restaurants (Rowson, van Poppel, & Gehrels, 2015), golf courses (Enz & Canina, 2016), self-storage units rental (Lieberman, 2016), and ski resorts (Malasevska & Haugom, 2018). For managers, setting the optimal price that aligns available capacity to anticipated customer demand through ideal distribution channels is fundamental to the success of RM strategies (Abrate & Viglia, 2016; Malasevska & Haugom, 2018). Particularly in the wine industry, which is characterized by high fixed costs, perishable products, and varying demand, business owners may benefit from the adoption of revenue management strategies.

Dynamic pricing. An important tenet of revenue management is price differentiation, in which business managers offer different products or services at different prices across the different market (Cetin et al., 2016; Raza, 2015). Several researchers have pointed out that pricing strategies may vary depending upon customer demand, product, quality, availability of alternative products, seasonality, and market conditions (Abrate & Viglia, 2016; Enz & Canina, 2016; Malasevska & Haugom, 2018). The comprehension of the relationship between pricing and those critical factors makes it possible for business leaders to improve profitability by adjusting pricing from a strategic perspective (Mohamed, 2016). RM is a long-term strategy; therefore, price differentiation involves continuous price revision as customer preferences change.

As observed by Kim, Lee, and Roehl (2018), hotel and lodging managers pricing decisions require detailed strategic thinking that integrates customers' responses and competitors' responses. The researchers examined how competitors reacted to a pricing change decision at other hotels using a fixed effect spatial panel that included parameters such as hotel size, hotel age, and hotel affiliation (Kim, Lee, & Roehl, 2018). The findings of the study indicated that competitors were not homogenous in their strategic responses, hence hotel revenue managers should consider their hotel's relative position in the market when developing a pricing strategy (Kim et al., 2018). Similarly, Abrate and Viglia (2016) approached the issue of tactical pricing decisions and the influence of the hotel's physical attributes, reputation, and contextual variables that included location and competition. Abrate and Viglia found that the contextual variables, specifically the number of competitors in real-time had the most influences on the managers' tactical pricing decision.

Zheng and Forgacs (2016) further postulated that while competition and cyclical or seasonal changes are motivating factors for hotel managers to implement room pricing strategies to optimize revenue potential, room price adjustments may not be sufficient to enhance overall financial performance. Zheng and Forgacs determined that hotel managers achieved financial goals by integrating other revenue streams such as restaurants, spa, function space, and other ancillary products and services into their revenue management practices. To explore the complexities of revenue management practices, Maier and Intrevado (2018) investigated revenue management strategies to maximize functional space utilization and rates. Maier and Intrevado found that hotel operators who deployed value-based pricing and product/service bundling based on function space utilization patterns could positively impact demand and revenue growth. More broadly speaking, the manager's combination of function space provides the opportunities to generate revenue from rooms, restaurants, and other ancillary services.

Dre and Nahlik (2017) extended the dynamic pricing strategies from the airline industry to major league baseball (MLB) industry. While both industries are similar concerning fixed and perishable inventory (capacity), definitive time duration, and ability to sell inventory in advance, there is a divergence in the areas of competition and consumer behavior (Dre & Nahlik, 2017). The researchers determined that in MLB industry direct competitors have limited influence on pricing strategies and consumers or "fans" perception of price unfairness could negatively impact consumer behavior toward future purchases (Dre & Nahlik, 2017). Likewise, Willie (2017) examined the successes and challenges of revenue management practices for professional sports organizations. The researcher found that revenue management an appropriate strategy for sports organizations whenever there was fixed capacity, perishable inventory, highly variable demand and price, advance purchase commitment, and relatively high fixed costs (Willie, 2017). Thus, by setting dynamically priced tickets in accordance with market demands, managers could effectively gain more value from transactions.

Customer segments. Customers' preferences vary greatly for selected products or services attributes. Vinod (2015) pointed out that by effectively segmenting a market, business managers could maximize profits by setting prices and limiting capacity offered through various distribution channels to specific customer segments. In the airline industry, carriers offer substantially different prices for the same type of seat on the same flight for different customer segments (Alderighi, Nicolini, & Piga, 2016). Consumers within each customer segment share similar characteristics concerning trip purpose, price sensitivity, and time sensitivity that influence an individual's willingness to pay.

In service industries, the central service pricing differential is a common management strategy which is driven by customer needs and therefore, service demand. In the airline sector, business travelers make reservations closer to their travel date and have a higher willingness to pay (Lieberman, 2016; Vinod, 2015). Conversely, leisure travelers book well in advance of their travel dates and have a lower willingness to pay (Lieberman, 2016; Vinod, 2015). Because of the varying customer demands, over time airline leaders have implemented price differential strategies by changing prices based on customer needs and willingness to pay.

Other service industries have fluctuating customer demands across time or market segments that could influence pricing approaches. The managers of golf courses and ski resorts tend to rely on a traditional pricing approach based on demand variations such as weekdays versus weekends (Enz & Canina, 2016; Malasevska & Haugom, 2018). In a study by Malasevska and Haugom (2018), the researchers applied a contingent valuation method to measure consumers' willingness to pay. The findings indicated that ski resorts had high variable demand and more price sensitivity during midweek days among young skiers with low skiing interest and couples without children (Malasevska & Haugom, 2018). To better exploit customers' willingness to pay to maximize profits, operators could shift customers into lower demand time periods at reduced prices while maintaining the full price at high demand time periods.

In contrast, Enz and Canina (2016) discovered that customers' buying habits remained relatively unchanged due to price increases or decreases in the golf industry. The researchers asserted that the lack of price elasticity by time or market segment suggest that golf is a discretionary purchase that causes last-minute excess or insufficient supply making it difficult for managers of golf courses to adjust prices in real-time (Enz & Canina, 2016). Hence, even small changes in price could substantially increase or decrease an enterprise's profitability. Finally, dynamic pricing allows managers to control capacity and enhance business planning efficiency.

In the winery context, winery operators could use customer segmentation and demand analysis to customize services and product availability based on customer preference and willingness to pay. Researchers discovered that knowledgeable wine enthusiasts are willing to pay more than uninformed customers. However, astute wine enthusiasts may not be as brand loyal (Pomarici, Lerro, Chrysochou, Vecchio, & Krystallis, 2017). Casual wine consumers may exhibit long-term loyalty and purchase more, though they are often motivated by winery promotional and discount incentives (Kim & Bonn, 2016; Olsen, Atkin, Thach, & Cuellar, 2015; Pomarici et al., 2017). Each customer segment is influenced by different factors when making wine purchase decisions. By understanding the behavior of wine consumers, winery operators could develop more targeted pricing strategies as well as design quality tourism activities to promote consumer loyalty and frequency of purchases.

With the growth in wine tourism, winery operators need to recognize the difference between wine consumers and wine tourists. Bruwer and Rueger-Muck (2018) posited that wine tourists are motivated to purchase wine by satisfaction with winery visit experience more than a desire for the wine product. McCole, Holecek, Miller-Eustice, & Lee (2018) also noted that wine tourists visited wineries in the Great Lakes regions for recreational experiences rather than wine purchases; however, the wine tourists spent a significant amount of money during their visits to the tasting room. To promote wine sales during winery visits, small-farm winery owners have increased innovative offerings beyond wine products that resonate with wine tourists to motivate purchasing of wine (Back, Bufquin, & Park, 2018). By focusing on customer segmentation and customer purchase behavior, small-farm winery operators can more accurately determine requisite levels of inventory pricing.

Inventory capacity and control. In the airline and hotel industries, one could characterize inventory capacity as perishable inventory, specifically unrented rooms or unsold seats. Managers in the airline and hotel industries and other service industries experienced successful revenue management application because they could manage capacities to meet specific customer segmentation demands (Choi, Jeong, & Mattila, 2014; Vinod, 2015). By studying the revenue management systems of six airlines, Doreswamy, Kothari, and Tirumalachetty (2015) discovered that airline leaders who utilized point of sale (POS) to adjust pricing to local market conditions could optimize forecasting capabilities and improve revenue levels. The airline leaders' comprehension of the relationship among pricing, capacity, and customer demand made it possible for fare class alignment and efficient inventory control.

In other industries, managers face more significant challenges in implementing RM techniques due to unpredictable customer demand. In a study of the car rental industry, Li and Pang (2017) evaluated the importance of demand forecasting and found managers who were able to devise various capacity rationing policies based on different booking patterns and fleet management decisions generated higher revenue as well as higher capacity utilization. Moreover, researchers found that restaurant managers needed to integrate decisions related to seating policies, table mix, and service delivery process to allow the staff to handle customer demand without impacting optimal revenue results (Noone & Maier, 2015). Hence, managers could improve inventory capacity in response to customer demands.

Often managers are unable to alter capacity in response to increased customer demand; therefore, managers implement revenue management strategies in an attempt to maximize customer spending. A related study by Bujisic et al. (2014), the researchers found that operators of beverage establishments strived to maximize customer spending to improve profitability because they were unable to expand capacity in the short-term in response to increased demand. Consequently, customers reduced consumption levels or switched to less expensive brands in response to price increases (Bujisic, Hutchinson, & Bilgihan, 2014). In restaurant operations, Noone and Maier (2015) noted that the corporate customer segment yields the highest average spend per visit than local customers; however, this segment also had larger party sizes and occupied tables longer during high demand periods thus reducing their overall contribution to total revenue. Managers should consider the different consumer segments competing for capacity at different time periods and their related purchasing behaviors to determine appropriate reference prices to optimize profits.

With multiple customer segments characterized by different preferences, it may be optimal for business owners to limit inventory choices to some sets of customers. Researchers posited that by allocating inventory capacity to each customer segment, business leaders could implement differential pricing to extract maximum value out of a specific customer segment, thus enhancing revenue (Lieberman, 2016; Noone, 2016; Vinod, 2015). It may be optimal not to offer products with low inventories to some customer segments and reserve them for customers who may have a stronger preference for the product and the willingness to pay a higher price. In situations with constrained inventory capacity, capacity rationing policies could lead to inventory perishability.

In many industries, capacity perishability is obvious, as in the case of seats on an airplane or rooms in a hotel. Similarly, for winery owners who operate tasting rooms lose revenue-generating opportunities each day the tasting room does not fill (Marlowe et al., 2016). Winery operators could develop pricing strategies to attract winery visitors on lower demand days. Likewise, one could view wine products as perishable due to the prevalence of high competition and changing customer demand (Golicic et al., 2016). Therefore, small-farm winery owners' ability to effectively manage and control inventory capacity could increase sales revenue opportunities and profits. Furthermore, winery operators could enhance revenues by successfully utilizing various distribution methods to meet customer demands and exploit inventory capacity.

Prior literature indicates that the practical application of revenue management techniques is a core strategy in airlines, hospitality, and some service industries to maximize profits. However, researchers have conducted far fewer studies examining the application of revenue management to nontraditional industries such as the wine industry. Each industry has specific characteristics that affect the practical application of revenue management in its individual companies. As a result, the focus of the present study was on the application of revenue management strategies by owners of small-farm wineries in Connecticut.

Transition

Section 1 included the research method for this study and included the research method and design appropriateness as well as the problem statement. Also, in this section, I provided a presentation and analysis of the scholarly literature related to small-farm wineries, farm income diversification, and economic performance. The historical overview included a discussion of the evolution of the wine industry in the U.S. and an exploration of the regulatory environment, small-winery operations, and revenue management strategies. I presented an analysis and critique of the conceptual framework to document the theories and previous findings related to the concept of DC .

Section 2 included a discussion of the population, sampling, and responsibilities the researcher as well as the data collection and organization process, data analysis techniques, and reliability and validity measurements I chose for this study. The results of the study appear in Section 3 with a description of the findings and recommendations for application to professional practices.

Section 2: The Project

In this section, I provide a comprehensive review of the qualitative case study design I used for this study. I begin by offering the purpose statement, followed with a discussion of the role of the researcher, study participants, and research method and design. I continue with a discussion on the collection process, including population and sampling, ethical research, data collection, and data analysis techniques. Lastly, I conclude the section with a discussion of the reliability and validity of the study.

Purpose Statement

The purpose of this qualitative multiple case study was to explore the revenue management strategies some owners of small-farm wineries use to promote long-term survival. The targeted population consisted of owners from three small farm wineries designated as *Connecticut Grown* farm wineries by Connecticut Department of Agriculture. These business owners have continuously farmed and operated profitable small-farm wineries for at least 10 years. The results of the study may highlight effective revenue management strategies small-farm winery owners could implement to enhance long-term survival and contribute to the economic prosperity of its employees and the local community.

Role of the Researcher

The role of a qualitative researcher is to apply appropriate strategies to data collection and analysis, and to present findings that synthesize the perspectives of the researcher and participants (Marshall & Rossman, 2016; Schoenherr, Ellram, & Tate, 2015). As the primary research instrument, my role in the data collection process included the following: (a) selecting appropriate participants, (b) interviewing participants following an interview protocol for consistency, (c) verifying accuracy of data through interpreted data review, (d) triangulating data for cross-validation, and (e) ensuring data saturation. Throughout the qualitative study process, I protected participants' rights, safety, and information within the *Belmont Report* guidelines (National Commission for the Protection of Human Subjects in Biomedical and Behavioral Research, 1978). I reviewed the *Belmont Report* protocol and completed the Protecting Human Research Participants training course (Appendix B), thus indicating my understanding of the importance of adherence to principles and guidelines within the *Belmont Report*.

In this qualitative study, I sought to explore the revenue management strategies some owners of small-farm wineries use to sustain long-term survival. I did not have a preexisting relationship with the owners of small-farm wineries in Connecticut who served as research subjects. However, I do reside in the state where I conducted the research, and I have patronized participants' wineries in the past. Yin (2018) stressed that to minimize potential bias, researchers should avoid preconceptions about the topic and remain open to findings contrary to their initial assumptions. I sought to avoid inclusion of my viewpoints by utilizing countermeasures such as adopting an appropriate sampling strategy, practicing interview techniques, and exercising reflexive introspection to facilitate impartial attitude and bias (Takhar-Lail & Chitakunye, 2015).

A qualitative researcher should maintain rigorous adherence to ethical standards and adopt procedures to overcome ethical challenges to strengthen research integrity

(Mahnaz, Bahramnezhad, Fomani, Mahnaz, & Cheraghi, 2014; O'Sullivan, 2015). I fully disclosed to all study participants the intent of my research, the use of the data collected, and the procedures I planned to implement to protect and secured data collected to maintain anonymity for all participants. Also, I communicated that participation in the study was voluntary, and I obtained participants' informed consent before commencing any interviews.

I collected data using semistructured interviews as part of a qualitative multiple case study. I asked the same open-end questions to all participants and followed the interview protocol (Appendix C) to ensure quality control over data collection (Yin, 2018). Dempsey, Dowling, Larkin, and Murphy (2016) urged researchers to have precise and well-planned field procedures encompassing guidelines for addressing reluctant interviewees and steps to build rapport. Given my professional career as an external auditor of small- and medium-sized enterprises, I drew on my extensive interviewing skills to facilitate the flow of communication and create an environment of trust.

Participants

The participants included all owners of small-farm wineries where both the business and business leaders met the study definitions. Due to practical considerations, the current study involved only a select portion of the populations, known as the target population or the accessible population (Boddy, 2016). Boddy (2016) and Fusch and Ness (2015) emphasized that the number of cases the qualitative researcher selects from the population should be grounded in the principles of data saturation. The target population included owners of small-farm wineries that met the following inclusion criteria: (a) ownership of small-farm winery operations in Connecticut, for at least 10 years; (b) *Connecticut Grown* designation from Connecticut Department of Agriculture; and (c) successful implementation of revenue management strategies to promote long-term survival. The inclusion criteria indicate the specific attributes that potential participants must possess to qualify for the study thus reinforcing sample homogeneity (Robinson, 2014). By establishing these clear and explicit inclusion criteria, I enhanced the validity and generalizability of this study.

Initially, I searched the Connecticut Department of Agriculture online directory to identify the small-farm wineries and gather contact information including wineries' website addresses. Also, I was able to isolate the wineries with *Connecticut Grown* designation. Next, I reviewed the websites of the identified wineries to determine if ownership of the operations and the years of continuous operations met the eligibility criteria. After review of each website, I formed a list of potentially suitable participants for this study.

In the final step, I contacted potential participants by an e-mail (Appendix D) that contained an informal introduction, an overview of the study, and informed consent form. Also, I explained the criteria for eligibility, invited them to be contributors to the study, and included instructions for interested owners to respond to the invitation. Etikan, Musa, and Alkassim (2016) reported that the identification and selection of specific participants who are proficient and well-informed could add valuable insight into the phenomenon of interest. From the positive responses I received, I telephone each of the respondents to request a face-to-face interview as a means to develop a working relationship and begin to build trust between the researcher and the participant (Robinson, 2014; Yanchar, 2015). I encouraged participants to ask questions regarding the intent of the study and the research process, and ensured understanding of their roles in the study.

As recommended by Marshall and Rossman (2016) and Yin (2018), I had participants sign the study informed consent form before beginning interviews to confirm the willingness of each participant to be part of this study. The informed consent form included an explanation of the focus of the study, the interview process, the role and responsibility of the researcher, the research process, the rights of the participants, and the risks and benefits of the research project. Further, to provide participants with a sense of trust within the project and with the researcher as Kaewkungwal et al. (2017) noted, I included a statement of my assurance to guarantee anonymity, limit access to data collected, secure storage of data, and preserve privacy when conducting the interview.

Research Method and Design

In business research, scholars select a research method and design that align with the nature of the research problem and aim of the study (Grossoehme, 2014). The purpose of this qualitative multiple case study was to explore the strategies some owners of small-farm wineries develop and implement to sustain long-term survival. For small-farm winery operations, reliable revenue streams directly influence the financial stability of the enterprise (Newton et al., 2015). Since the business problem I explored involved in-depth interviews to answer questions related to the linkage between revenue management strategies, financial stability, and business sustainability, a qualitative multiple case study was appropriate for this study. In the following section, I provided the rationale for the selection of the research method and design.

Research Method

Researchers follow a proven method to guide the collection, interpretation, and analysis of data (Powers & Gendron, 2015). I considered the three methods of research: (a) qualitative, (b) quantitative, and (c) mixed methods, and chose the method that would allow me to fulfill the research objectives. I selected a qualitative research approach to explore the business problem by capturing data from participants through face-to-face interviews and applying thematic analyses. Thematic analysis is a qualitative research method that researchers use to identify themes or patterns, produce a thematic description, and draw and verify conclusions across an interview or set of interviews (Braun & Clarke, 2006; Vohra, 2014).

The quantitative research method is appropriate when examining the relationship between variables by measuring and analyzing numerical data through standard measures and statistical techniques (Cronin, 2014). The use of standardized measures and statistical techniques supports a positivist or deductive philosophy by which researchers discover or confirm objective facts based on empirical testing (Creswell & Creswell, 2018; McEvoy & Richards, 2006; Yilmaz, 2013). While the qualitative approach is typically more flexible, allowing greater adaptation of the interaction between the researcher and the study participants, the quantitative approach involves use of numeric data to quantity responses or results of the research (Antwi & Hamza, 2015; Yilmaz, 2013). I did not select the quantitative approach because I did not intend to identify the relationship among variables but rather to answer the research questions and gain a better understanding of a business problem through face-to-face interviews, observations, and archival documents.

The mixed-methods research approach is the combination of quantitative and qualitative research techniques. Researchers apply mixed-methods to address more complicated research questions and develop a deeper theoretical understanding (Creswell & Clark, 2017; Saunders, Kitzinger, & Kitzinger, 2015). Goldman et al. (2015) mixed survey instruments, patient outcomes, quality measures, qualitative interviews, and participant observation to provide a comprehensive understanding of a patient-centered medical home transformation. Researchers applying mixed-methods needs to allocate more time and resources to conduct both a qualitative and quantitative study (Gough, 2015). I did not select the mixed-methods approach because I did not employ quantitative analysis. I chose to use a qualitative research method because this approach was the suitable method to explore the lived experiences of owners of small-farm wineries to understand the *how* and *why* of the topic of the study and be able to formulate conclusions to solve the business problem.

Research Design

The research design entails a plan that shows a clear process of data collection and analysis that connects with the research question and produce a solution that may solve a business problem (Gaus, 2017). I considered three research designs suitable for a qualitative study on RM strategies: (a) phenomenology, (b) narrative, and (c) case study. When using phenomenology design, researchers explore human experiences of a particular group to understand individual perceptions and shared-experiences (Marshall & Rossman, 2016; Padilla-Diaz, 2015). Since I did not intend to gather descriptive lived-experiences of individuals in a particular group (Grossoehme, 2014), a phenomenology design was not applicable.

In a narrative design, the researcher preserves historical connections and the sequencing of events to construct an account of one or two individuals' experiences to apply to a broader social context (Ison, Cusick, & Bye, 2014; Vyver & Marais, 2015). Ingham-Broomfield (2015) stated that a significant part of a narrative design is for researchers to analyze a defined event to understand the impact on the present environment. Due to the pointed nature of the narrative design, I excluded this design option for this study.

Using a multiple case study design, a researcher may more effectively consider the *how* and *why*, and to obtain details and perspectives concerning a specific situation replicated across more than a single case (Robinson, 2014; Yin, 2018). A single case study design is appropriate when the single case represents an extreme or unique case in which researchers can infer theoretical constructs or theories (Dasgupta, 2015). Business management researchers often use multiple case studies to understand *how* and *why* business leaders across different firms deploy specific strategies and the impact of the specific strategic decisions on the organization (De Massis & Kotlar, 2014; Kurnia, Karnali, & Rahim, 2015). Eventually, I determined the multiple case study design the appropriate research design to explore revenue management strategies to promote long-term survival of small-farm wineries in Connecticut.

Qualitative researchers achieve data saturation when data collection does not produce new themes or patterns and data becomes repetitive (Fusch & Ness, 2015; Yin, 2018). Marshall, Cardon, Poddar, and Fontenot (2013) noted the point of data saturation in qualitative research is subjective based in part on the purpose of the study, quality of the interviews, number of interviews per participant, sampling procedures, and the researcher's experience. Huerta, Petrides, and O'Shaughnessy (2017) and Chalus-Sauvannet, Deschamps, and Cisneros (2016) achieved data saturation after exploring six cases of family-owned businesses. Whereas Andringa, Poulston, and Pernecky (2015) showed saturation after 16 cases in their study on hospitality entrepreneurs. I collected data from three different owners of a small-farm winery using semistructured interviews until I reached data saturation. To ensure data saturation, I used purposeful sampling to select appropriate participants and extended participant until no new information emerges. Further, I applied methodological triangulation by collaborating findings from primary data (interviews) with secondary data from multiple sources such as observation notes, organizational documents, and each small-farm winery's website to support the validity of this study.

Population and Sampling

The population included all owners of small-farm wineries in Connecticut where both the owner and business met the study definitions. The current study involved only a select portion of the population that scholars refer to as a target population (Robinson, 2014; Yin, 2018). I conducted a multiple case study comprising a sample of owners of small-farm wineries, who have successfully implemented revenue management strategies. The sample size was reliable because I reached data saturation. The population and geographical location selection were suitable for the proposed study to gain insight into the long-term survival of small-farm wineries in a state with comparable challenges and opportunities as other surrounding states.

The selection of the participant was through purposive or criterion-based sampling to ensure the participants possess the knowledge or expertise to contribute to the study (Etikan et al., 2016). In qualitative research, scholars focus the quality of the information rather than a specific number of participants to gain an in-depth understanding of the research topic (Grossoehme, 2014; Marshall & Rossman, 2016; O'Halloran, Littlewood, Richardson, Tod, & Nesti, 2018). The participants were owners of small-farm wineries that met the following inclusion criteria: (a) ownership of small-farm winery operations in Connecticut, for at least 10 years; (b) *Connecticut Grown* designation from Department of Agriculture; and (c) implemented successful revenue management strategies to promote long-term survival.

I interviewed three small-farm winery owners and reviewed secondary data from organizational documents and winery's website to achieve data saturation. Scholars recommended that qualitative researchers should continually add case studies into the study as necessary to achieve research objectives and data saturation (Boddy, 2016; Fusch & Ness, 2015; Marshall et al., 2013). I determined that the collection of data from the three small-farm winery owners was sufficient to achieve research objectives and support claims of data saturation. I involved all participants in follow-up interviews and interpreted data review for accuracy and to add omitted or new information. In addition to the relevant data from the interviews, I reviewed and analyzed direct observations, organizational documents, and each winery's website to contribute to methodological triangulation and increase the validity of this study (Henry, 2015; Yin, 2018).

Rimando, Brace, Namageyo-Funa, Parr, and Sealy (2015) noted interview location choice could influence data collection process. Therefore, researchers may need to adjust the interview protocol to ensure quality data collection. For this study, face-to-face interviews using open-ended questions took place at participants' places of business. By conducting interviews in a location that was convenient and safe for participants, the participants were able to express themselves freely and provide quality rich data. Furthermore, selection of a suitable interview setting could be especially beneficial for researchers to gather additional insights through direct observation (Antwi & Hamza, 2015; De Massis & Kotlar, 2014). In this study, I conducted the interviews at each winery and was able to confirm participants' descriptions of the business environment and enrich my understanding of participants' experiences in a natural setting.

Ethical Research

A qualitative researcher must uphold ethical principles and standards throughout the research process (Christensen, 2015; Harriss & Atkinson, 2015). Concerning study participants, a qualitative researcher should honor the guiding principles of respect, beneficence, and justice (NCPHSBBR, 1978). My completion of the National Institutes of Health (NIH) web-based training on the protecting human research participants (Appendix B) developed my capacity to uphold the ethical principles and standards during this research study. I followed Walden University Institutional Review Board (IRB) guidelines and took the necessary actions to obtain approval before taking initial steps in data collection. Walden University's IRB approval number for this study is 03-08-19-0659000.

Upon receipt of IRB approval, I personally introduced myself to each prospective participant and provided the informed consent form, allowing the participants time to ask questions for understanding. Foe and Larson (2016) found that quality interaction between researcher and prospective participants during the consent process resulted in an improvement of comprehension of the informed consent. Therefore, I spent time with each prospective participant to review the informed consent to ensure that participants understood their commitment to the study.

Foe and Larson (2016) suggested that the informed consent contain vocabulary and natural language most appropriate for the study context to adequately inform prospective participants. I included wording to inform prospective participants of the purpose of the study, any anticipated risks or benefits, and reassurance to maintain confidentiality and protect their privacy. Also, I included a statement to explain that participation in the study was voluntary and participants could withdraw from the study at any time without penalty. After participants indicated their understanding of their role in this study and agreed to the terms contained in the consent form, I asked each participant to sign a consent form. Each participant received a copy of the consent form for their records.

I assigned each participant with a unique code to maintain respondent confidentiality and protect the identity of each participant. I matched each unique code assigned to a participant to the related data collected and documents retrieved to facilitate the administrative process and linked information for each participant. Saunders, Kitzinger, and Kitzinger (2015) noted that researchers should take care not to reveal participants' names or places of business during the recorded interviews process to safeguard the identity of each participant. I refrained from using any identifying names of participants and requested that participants refrain from using their names or the names of the winery during their respective recorded interviews.

Participants did not receive any form of compensation or incentive for their participation in the study. However, the participants may obtain an electronic copy of the final report upon request. I secured all hard copies of all research data and materials in a locked filing cabinet upon completion of the study. I saved the audio recording of the interviews and other electronic data on a thumb drive data storage device, which I will store along with the other research documents for a 5-year retention period. Following the retention period, I will permanently destroy all printed research documents and electronically saved data in a manner consistent with destroying confidential information.

Data Collection Instruments

For this qualitative multiple case study, I served as the primary data collection instrument. The evidence researchers collect must have a clear purpose and relate to the aim of the study (Houghton, Casey, & Smyth, 2017). Therefore, researchers need to judiciously consider the various data collection methods to ensure adoption of the appropriate techniques to provide support of the research topic (Houghton et al., 2017; Yin, 2018). Some of the primary methods for collecting data in a qualitative study are individual interviews, focus groups, observation, and documentation (Yin, 2018). For this study, I used multiple sources for data collection that included face-to-face semistructured interviews, organizational documents, and each winery's website.

By conducting face-to-face interviews, researchers afford participants a comfortable forum to converse openly and freely that will provide rich, in-depth information (Merriam & Tisdell, 2015). Dasgupta (2015) indicated that researchers employing semistructured interviews with open-ended interview questions could facilitate participants' engagement and willingness to share their lived-experiences. Nel, de Goede, and Nieman (2018) expressed that the researchers' selection of semistructured interviews as a data collection instrument afforded them the flexibility and adaptability to accomplish a comprehensive study. I conducted my research using a semistructured, face-to-face interviews approach, along with organizational documents, and winery website to explore revenue management strategies some owners of small-farm wineries use to promote long-term survival.

Scholars posited that researchers use an interview protocol as a guide to maintain consistency in the data collection process and to uphold the ethical standards of a research study (Castillo-Montoya, 2016; Lugg-Widger et al., 2018). Hulthén, Naslund, and Norrman (2016) shared that by following an interview protocol, the researchers were able to maintain a line of inquiry that helped to mitigate any potential biases. I followed the interview protocol (see Appendix C) that enabled me to focus on the interview questions to extract adequate information from the participants with stability and consistency throughout the data collection process. The interview questions were clear and aligned with the research question (see Appendix C).

An additional data collection instrument qualitative researchers often employ is company or archival documents (Marshall & Rossman, 2016; Smith, 2016). Yin (2018) stated researchers utilize documents as a data collection instrument to corroborate and support evidence retrieved from other sources. For this study, I used relevant business documents obtained from the participants and other materials available on the organization's website.

To enhance the reliability and validity of the data collection instrument and data collection process, I used member checking and methodological triangulation. Lincoln and Guba (1985) described member checking as a range of activities researchers use to ensure that they present the participants' meaning and perceptions accurately in the transcribed or synthesized data. According to Harvey (2015), a researcher's use of member checking for verification purposes is appropriate and strengthens the creditability of the research. Member checking activities could include transcript review, follow-up interviews, focus group member checks, or follow-up interviews and interpreted data review (Birt, Scott, Cavers, Campbell, & Walter, 2016). Similar to Warren and Szostek (2017), I used follow-up interviews and interpreted data review to obtain participants' feedback on the accuracy of the interpretation before incorporating the data into the final analysis. I conducted an informal follow-up interview with each study participant which took no more than 5 minutes of their time. The informal follow-up interviews consisted of open discussions of interpreted data and emerging themes with each study participant and to ascertain that the conclusions reflected the information the study participants shared during the interview process.

Yin (2018) explained that methodological triangulation offers qualitative researchers a process to confirm or to collaborate evidence gathered from different data collection sources. Caldarelli, Fiondella, Maffei, and Zagaria (2016) triangulated data from in-depth semistructured interviews, relevant internal and external documents, and working notes that allowed a deeper understanding of the phenomena and enhance credibility. Internal and external documents I obtained from the participants and available in the public domain were useful in the collaboration of data from the semistructured interviews, thus enhancing validity and reliability.

Data Collection Technique

The data collection techniques I used to explore the revenue management strategies some successful owners of small-farm winery operations implement to promote long-term survival was face-to-face semistructured interviews and document analysis. Proponents of face-to-face interviews cited rapport building, in-depth responses, and visual cues observation and assessment as significant advantages of this data collection technique (Farooq & de Villiers, 2017; Opdenakker, 2006; Qu & Dumay, 2011; Vogl, 2015). Conversely, McIntosh and Morse (2015) contended that the presence of the interviewer could affect the respondents and the willingness to response to sensitive questions face-to-face. El Haddad (2015) found that by using semistructured interviews in the study of revenue management practices in a hotel chain, the researcher was able to collect reliable, comparable qualitative data, and participants were allowed the freedom to express their views in their terms. For this study, I conducted the face-to-face semistructured interviews asking open-ended questions to elicit in-depth responses from participants on the topic.

The second data collection technique I used for this study was document analysis. Document analysis is a process whereby a researcher locates, selects, and appraises a variety of documents and through thematic analysis, synthesizes the data into overarching themes (Bowen, 2009). Potential sources of materials for this study included different forms of company documents such as brochures, pricing charts, tasting sheets, and events/programs calendar obtained from the owners or retrieved from winery website. Although the review and analysis of documents obtained from participants could be more cost effective and provide a useful source of secondary data, some researchers may find it challenging to identify applicable, relevant documents, and the document analysis process could be time-consuming (Yin, 2018). My decision to use document analysis was because the benefits of this data collection technique surpassed the shortcomings concerning this study. Marshall and Rossman (2016) posited that researchers could consider information from companies' websites as a source of documentary data. Accordingly, I reviewed each website of the winery I included as part of this study for contextual information and other corroborative evidence.

Upon receiving approval from the Institutional Review Board, I solicited for participants through email communication (see Appendix D) sent to addresses listed on the website of each of the small-farm wineries in Connecticut that met the specific criteria of the study. Next, I made telephoned each responder who agreed to participate in the study, to clarify any question about the study and arranged an interview date and time convenient to participant's schedule. I interviewed the owners at their place of business to minimize disruption to their schedules and provide a comfortable atmosphere. Before commencing with the interviews, I secured a signed informed consent form indicating the participants' voluntary agreement to participant in the study. I conducted the in-depth interviews and obtained relevant organization documents, closely following a well-constructed interview protocol (see Appendix C). Castillo-Montoya (2016), and Wang, Xiang and Fesenmaier (2014) pointed out that an interview protocol enables a researcher to maintain consistency from one interview to another hence reinforcing reliability and validity of the study.

I conducted the interviews at the participants' places of business to promote a comfortable interviewing environment resembling studies by Scheibe, Reichelt, Bellmann, and Kirch (2015) and Woodfield, Shepherd, and Woods (2016). With the participants' permission, I recorded the interviews with an audio voice recorder. During the interview, I made notes of nonverbal cues such as body language and vocal inflections. After each interview, I transcribed verbatim the recorded interview data into Microsoft Word and imported data into NVivo software. Before commencing on the data analysis process, I executed a member checking process.

Lincoln and Guba (1985) recommended member checking as a process to verify the accuracy of the description or interpretations. I sent an interview summary of each interview to the respective participant for confirmation on the interpreted data and discussion through a follow-up interview. Moreover, Harvey (2015) indicated that by researchers sharing initial themes and allowing participants to share thoughts and comments rather than asking specific follow-up questions would better reflect participants' experiences. Therefore, my member checking process was an open-ended discussion that included inquiries on the accuracy of the summary, objections, or comments to the interpretation, and any additional data to contribute to the study. Each participant confirmed the accuracy of my interpretations reflected their respective views.

Data Organization Technique

Comprehensive data organization techniques encompass the collection, organization, storage, and retrieval process of original data during and following the research period (Marshall & Rossman, 2016; Yin, 2018). I used (a) an audit trail, (b) a literature review matrix, and (c) an audio recording. An audit trail is the compilation of all study materials and notes researcher used to document data collection, recording, and analysis during the inquiry process (Henry 2015). Original research data included interview transcripts, interview interpretations and member checking summary, other research documents, data analysis and process notes, and draft of the final report.

I cataloged and maintained each reference used to support claims and decision in the literature review matrix utilizing Microsoft Excel. Following Clark and Buckely's (2017) suggestion, I displayed as much significant information as possible including key words, article type (i.e., peer-reviewed), main ideas of the article, research methodology, keywords, and synthesize of themes. I saved references in electronic format to designated folders by relevant topics.

Similar to Gibson, Webb, and Lehn (2014), I used an audio recording device during the face-to-face interviews with participants and uploaded to NVivo software for coding and data analysis. To protect the identity participants, Morse and Coulehan (2015) advocated the use of unique codes and removal of identifying information from documents. Therefore, I assigned each participant a unique code starting with WIN1to protect the identity of the participants. Also, I redacted organization documents collected to protect the confidentiality and privacy of each participant. I maintained a list of participants' names and unique codes.

I will retain all data collected for 5 years and then properly dispose of all saved data. I will secure hard copies of transcribed data and archived data in a locked file cabinet and dispose of by shredding. With regards to electronic and audio records, I will save the data on my password-protected computer until which time I will permanently delete all electronic data and destroy digital voice recordings.

Data Analysis

Central to the qualitative research methodology is the use of an appropriate data analysis process to interpret the data (Gaus, 2017). A researcher's choice of data analysis techniques depends upon the research design and the type of data (Gale, Heath, Cameron, Rashid, & Redwood, 2013; McCusker & Gunaydin, 2015). For this qualitative study, I conducted data analysis through methodological triangulation and thematic analysis. Similar to other qualitative researchers, I employed computer-assisted qualitative data analysis software to sort, code, and identify themes (Chowdhury, 2015; Davidson, Thompson, & Harris, 2017; Woods, Paulus, Atkins, & Macklin, 2016).

Triangulation is a method that researchers use to validate the data acquired from various sources of evidence and support completeness of the research (Sechelski & Onwuegbuzie, 2019; Yin, 2018). Trotman and Wright (2012) noted that each data source possesses unique strengths and weaknesses; hence the gathering evidence from all sources is essential to formulating and assessing findings. During each interview session, I gathered contextual information from organizational documents that could broaden the evidence base. I utilized the additional documents as a form of methodological triangulation to cross-examine the coded interview data with document analysis on the additional material of each case study. Scholars argued that researchers that use methodological triangulation could gain a more comprehensive assessment of a business problem through the confirmation of a finding using multiple data that enhance transferability (Gibbs, Shafer, & Dufur, 2015; Mertens & Hesse-Biber, 2015). Accordingly, I used multiple data sources to develop key themes that reflect participants' perception and experiences thus; methodological triangulation was suitable for this study.

Thematic analysis is a qualitative data analysis method that researchers use to identify themes or patterns across a data set (Braun & Clarke, 2006). Through thematic analysis, a qualitative researcher organizes texts, converts to codes, and finally identifies and correlates themes to the conceptual framework, the literature, and the research questions (Henderson & Baffour, 2015; Patterson, Emslie, Mason, Fergie, & Hilton, 2016; Tricco et al., 2016). Researchers posited that a successful data analysis process includes the use of computer-assisted data analysis software (Davidson et al., 2017; Zamawe, 2015). In utilizing a computer-assisted data analysis software such as NVivo, the researcher can code, sort, and organize data effectively and efficiently that could streamline the retrieval process (Zamawe, 2015). On completion of interview transcription and member checking, I used the NVivo software to analyze all participants' responses and synchronize themes with the other data sources so that the findings included elements representing themes for all sources.

Reliability and Validity

Reliability and validity are key aspects of a qualitative research study. Since qualitative researchers use less quantitative research methods and rely more upon subjective judgment, researchers need to be particularly sensitive to the issue of reliability and validity of their research projects (Yin, 2018). Researchers should design their research study and utilize appropriate research techniques that promote the quality of their study and usability in addressing real-world business problems.

Reliability

Researchers describe reliability as the consistency of research procedures and interview protocol that yield dependable results and replication of the study by other researchers (Fusch & Ness, 2015; Morse, 2015; Yin, 2018). During the research process, I strengthened the reliability of the study by developing a clear and concise audit trail detailing data collection and analysis, selection of themes, and outlining reasons for decisions made throughout the research process (Henry, 2015). Further, I used an interview protocol for each interview to promote a level of consistency in questions asked. I tape recorded and took notes during the interviews to capture interview participants' responses to limit errors and enrich the dependability of the research study.

Marshall and Rossman (2016) suggested that researchers use the member checking process, so participants can confirm the accuracy of the data and enrich the dependability of the research study. Also, Yin (2018) advocated that member checking helps researchers to identify convergence of findings by offering study participants the opportunity to verify their information and contribute additional new information. Finally, I reached data saturation when gathering, analyzing, and interpreting information from participants failed to produce new information. Through the application of these research methods, I reinforced the dependability, consistency, and generalizability of this study.

Validity

According to Cronin (2014), researchers uphold the validity of a study by ensuring credibility, transferability, and confirmability of the findings. To extend the validity of a study, researchers could use different data collection methods, data analysis techniques, and systematic recording of all methodological decisions (El Hussein, Jakubec, & Osuji, 2015). I used the following strategies to support the constructs of validity: (a) data saturation, (b) methodological triangulation, (c) member checking, and (d) an audit trail.

Credibility. Qualitative researchers strive for credibility to ensure the research findings represent plausible evidence drawn from research data (Anney, 2014) and accurate interpretation of the data (Noble & Smith, 2015). Member checking involves the researchers establishing structural corroboration of the analysis and interpretation of the research data (Lincoln & Guba, 1985; Marshall & Rossman, 2016). I used member checking to address the credibility of the analysis and interpretation of the data. Researchers discussed using different data collection methods to triangulate for credibility (Anney, 2014; Fusch & Ness, 2015). In this study, I applied methodological triangulation using two sources of data: interviews and document review.

Transferability. Transferability pertains to the degree that findings in a qualitative research study could apply to other contexts or situations with different populations (El Hussein et al., 2015; Leung, 2015). Moreover, to enhance transferability, Marshall and Rossman (2016) suggested that research carefully document the research processes from data collection, data analysis and interpretations to final report to allow other researchers to determine the transferability of the study findings. To facilitate transferability of this study, I documented a detailed description of the participants and the research process to enable other researchers that have an interest in small-farm winery topics to make a transferability assessment.

Confirmability. Guba and Lincoln (1982) stated the establishment of confirmability relates to the neutrality and accuracy of the data. Qualitative researchers must take efforts to reduce researcher biases and uphold that participants' narrative and interpretation are the basis of the findings (Anney, 2014; Moon, Brewer, Januchowshi-Hartley, Adams, & Blackman, 2016). To ensure confirmability, I carefully crafted a detailed audit trail, as recommended by Hoover and Morrow (2015) to link together the data collected, analytic process, and the study findings. Further, I reinforced confirmability by following the qualitative measures and procedures such as the interview protocol, member checking, and methodological triangulation.

Data Saturation. Qualitative researchers achieve data saturation at the point when researchers have gathered sufficient quality information to support replicability, and no new themes emerge from data (Kornbluh, 2015; Morse & Coulehan, 2015; Yin, 2018). Researchers emphasized that scholars should provide a persuasive presentation of evidence with sufficient details to support their claim of data saturation (Boddy, 2016; Fusch & Ness, 2015). I reached data saturation after conducting three interviews and applying member checking and methodological triangulation and no new information or new themes emerged. The failure to achieve data saturation could weaken the reliability and validity of this study.

Transition and Summary

In Section 2, I discussed my role as the researcher and the data collection process, strategies to recruit participants, and more detailed justification for a qualitative case study approach. Further, I described the population and sampling approach, strategies to ensure ethical research, data collections and organization techniques, and data analysis techniques. Finally, I included a discussion of the strategies I utilized to ensure reliability and validity of this study as well as dependability, credibility, transferability, confirmability, and data saturation.

In the Section 3, I present the study findings, which include identification of themes, discussion of the findings in relation to the themes and the conceptual framework. Also, I propose applicability of the results to professional business practice, implications for social change, and provide recommendations for further research.

Section 3: Application to Professional Practice and Implications for Change

Introduction

The purpose of this qualitative multiple case study was to explore the revenue management strategies some owners of small-farm wineries use to promote long-term survival. The specific business problem I addressed was that some owners of small-farm winery operations lack revenue management strategies to promote long-term survival. The overarching research question that guided this study was: What revenue strategies do successful owners of small-farm winery operations implement to promote long-term survival? All participants owned and operated a small-farm winery with *Connecticut Grown* designation for at least 10 years and successfully implemented revenue management strategies.

I collected primary data through semistructured face-to-face interviews with three small-farm winery owners in Connecticut. I presented a transcript summary of interpreted themes to participants for member checking, as suggested by Harvey (2015), to strengthen the creditability of the study. I obtained secondary data from organizational documents and review of the winery websites. I analyzed the primary and secondary data to perform methodological triangulation and categorized emergent themes that reflected participants' perceptions and experiences (see Figure 2).

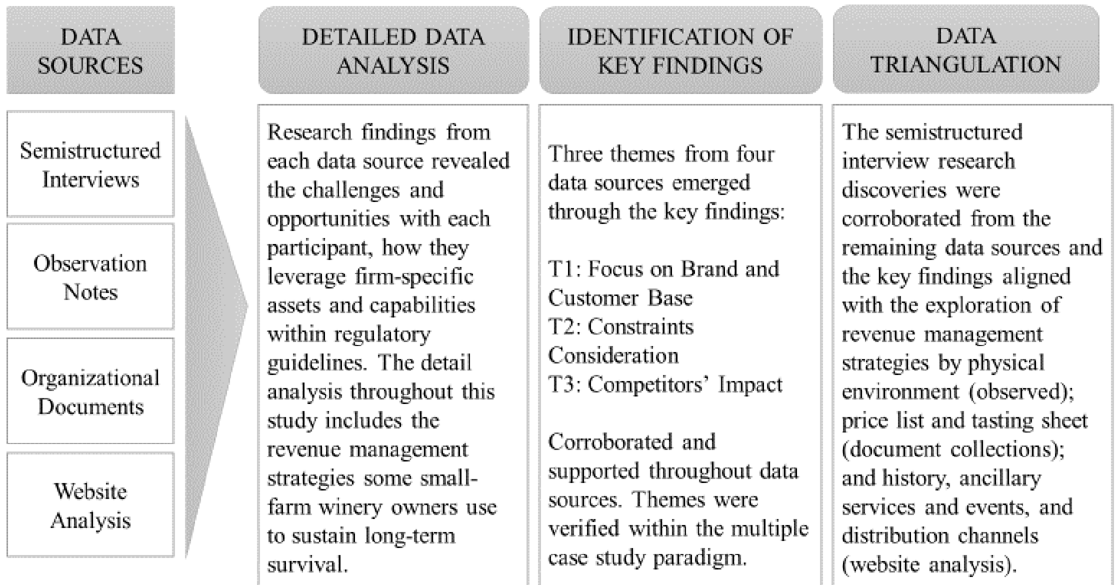

Figure 2. Overview of data triangulation.

The findings showed that all participants reported brand experience as paramount to successful revenue management strategies. Moreover, participants noted that owners who developed stable networks, a quality customer base, and business model innovation enhanced long-term survival of their enterprise. With frequency, owners stated regulatory policies and resource constraints influenced revenue management strategy decisions. The findings from this study reflected the presence of sensing, seizing, and resource configuration concepts from the DC framework used as the foundational lens of this study.

Presentation of the Findings

The research question for this multiple case study was: What revenue management strategies do some owners of small-farm wineries use to promote long-term survival? In this study, I applied DC as the conceptual framework to base the research and develop semistructured interview questions for data gathering. I conducted face-to-face interviews and recorded each participant's responses to the six interview questions (see Appendix A). To protect the confidentiality of participants and respect their privacy, I assigned a unique code to each participant as WIN1, WIN2, and WIN3. I followed an interview protocol to mitigate my biases. During the interviews, I took observation notes and gathered organizational documents. I applied methodological triangulation using the observation notes, organizational documents, and information retrieved from each winery's website to supplement the data collected through the semistructured interviews.

After interviewing each participant, I transcribed the interview and used NVivo software to analyze, manage, and organize themes. I presented the transcript summary to the participants for confirmation of interpreted data and performed member checking. Within the NVivo software, I was able to code textual data from transcripts, observation notes, organizational documents, and analysis of each winery website that related to each theme. The data analysis process concluded when data saturation occurred. I identified three emergent themes small-farm winery owners used in revenue management strategic decisions to promote long-term survival: (a) focus on brand and customer, (b) constraints consideration, and (c) competitors' impact.

All three participants of this study own and operate family-controlled enterprises. Each enterprise is deemed a small winery based on USDA production levels (USDA, NASS, 2017) and exceeded the 25% minimum in-state fruit requirement (Conn. Gen.

Stat. §30-16, 2017 as amended). Table 2 displays the specific demographics of each participant.

Table 2

Participant Demographics

	WIN1	WIN2	WIN3
Ownership	Family	Family	Family
Generation	2	1	3
Estate grown	93%	55-70%	75%
Production level (in gallons)	5,000	9,000	6,500

Note: Demographic information retrieved from interview data and document review.

In the subsections that follow, I present further analysis of each theme and the alignment to the DC conceptual framework and the contribution to existing literature. Each theme identified is dependent on the other to assist small-farm winery owners in developing and implementing revenue management strategies. Furthermore, owners of small-farm wineries must consider the internal and external factors of each theme and its influence on the long-term survival of their enterprise.

Theme 1: Focus on Brand and Customer Base

The first theme to emerge from the data was that product brand and resilient customer base notably influenced the small-farm winery owners' revenue management strategy decisions. Moreover, each small-farm winery owner fostered a business philosophy that drove different revenue management strategies that often promoted long-term survival rather than maximizing profits. Table 3 displays the subthemes or components related to product brand and resilient customer base that influenced winery owners' revenue management strategy decisions, and the frequencies of occurrence.

Table 3

Subthemes for Theme 1: Focus on Brand and Customer Base

Subthemes	*N*	*% frequency of occurrence*
Pricing	15	28.1%
Product and services	18	31.6%
Customer segment	11	19.3%
Wine experience	12	21.1%

Note: *N* = number of participant responses linked to the subtheme.

Pricing. A major element of any revenue management decision is the pricing structure. Several researchers deduced that pricing strategies might vary depending upon certain factors such as customer demand, product, quantity, alternative products options, seasonality, and market conditions (Abrate & Viglia, 2016; Enz & Canina, 2016; Malasevska & Haugom, 2018). WIN1 provided the following example:

> In deciding on the price of bottles, there is aging that is required; there is different equipment required for different bottles. Ice wine is hand-picked when it is zero out. There is a lot of labor hours and hand bottling. You are harvesting once every 5 or 6 years. So that price is going to be much higher exponentially compared to some that we rely on yearly.

Also, all three study participants stated that mark-up layers of distribution through wholesalers to the retail market influenced their pricing decisions.

The price point of a wine product is the price consumers will tolerate or deem appropriate to pay (Beckert, Rössel, & Schenk, 2016). For the participants in this study, the primary concern was setting a price point for wine products available for on-premises sale that was in the range with the retail market and competitors, and visitors were willing to pay for the product. For sustainability and profitability, owners of small-farm wineries' understanding of consumer willingness to pay are critical in determining appropriate pricing. Moreover, WIN1 and WIN3 underscored that as small wine producers with slim profit margins, it was more about educating customers on the value of their wine products and why the price points might be more or less expensive than their competitors.

Contrary to findings of other researchers (Back et al., 2018; McCole et al., 2018), small-farm winery owners in this study seldom changed prices based on customer purchase behavior and willingness to pay. The study participants mentioned that in addition to the grapes, changes in the other production materials (i.e., bottle, cork capsule, labels) affected the change in pricing. WIN3 explained:

> Over the years we became more sophisticated in our ability to track costs. Now we regularly increase the price per bottle to the equivalent of $.50 wholesale and $1.00 retail to keep pace with inflation. But when you raise your prices, sales stagnant for a time until consumers absorb the new pricing.

Finally, to increase transaction size, the three study participants used "case discounts" on purchases only through the tasting room. Because the winery owners in this study derived majority of their revenue by direct-to-consumers sales through their tasting rooms, they agreed that it was important that pricing strategies target tasting room visitors.

Products and services. Participants in this study also suggested that wine quality was an essential attribute in setting the price of their wine products. WIN3 indicated that they had higher-priced premium products with a good margin in the mix of wine products available for sale. Upon review of each winery wine list, I noted reserve and specialty wines priced 25% to 60% higher. Also, all winery owners emphasized the importance of being designated Connecticut *Grown,* producing wines blended from grapes grown in Connecticut . WIN1stated that the main goal and focus when they established their winery was to be a true Connecticut grown. Furthermore, WIN1, WIN2, and WIN3 all exceeded the imposed 25% in-state fruit requirement (Conn. Gen. Stat. §30-16, 2017 as amended). All three study participants expressed that the impetus to have the *Connecticut Grown* designation was to control the types of grapes grown and how they are grown to ensure product quality and integrity.

Though the three small-farm winery owners in this study focused mainly on selling a quality product to promote long-term survival, the owners had different approaches to increase revenues. WIN3 developed new products to meet customers changing preferences. Specifically, the owner began producing sulfite-free wines in response to government warning on sulfites and fruit wines in response to consumers' interest in healthy food and beverages containing anti-oxidants. WIN3 commented that its blueberry wine was their most popular seller. WIN2 introduced a Portuguese-style wine as an homage to the owner's heritage. Finally, WIN1 collaborated with a local distillery to produce a dark rum infused wine which was sold at a premium price. These findings supported the existing body of knowledge that managers must reconfigure resources and capabilities to align with the changing environment to attain innovative performance (Nieves & Haller, 2014; Ou et al., 2015).

Researchers have noted that winery owners operate tasting rooms to introduce and market their wine products to consumers (Duarte Alonso et al., 2015; Marlowe et al., 2016; Sun et al., 2014). All the study participants offered wine tastings, wine by the glass, and bottles of wine through their tasting rooms. The price of the wine tastings ranged from \$10 to \$12 per tasting, while a glass of wine was between \$8 and \$12 depending on the varietal. The study participants acknowledged these activities contributed to their revenue stream, but it was repeat customers and subsequent sales of full bottles that supported long-term survival. WIN1 explained, “We are not trying to draw as many people as possible to the tasting room, but rather trying to get a better-quality customer.” Also, WIN3 expressed, “We want people to fall in love with our wines and then come back, buy them, and use them the rest of their lives.” The findings indicated that the winery owners had a RM strategy focused on building a relationship with customers and viewing customers as strategic assets that determine a firm’s competitive advantage within the DC framework (Teece et al., 1997).

Only WIN2 indicated that the tasting room activities were the most important source of revenue for its winery. When WIN2 established its winery, owners did not operate formal tasting rooms and instead only sold bottles to customer for off-premise consumption, similar to retail stores. WIN2 described how they adopted a new business model that replaced the traditional distribution strategy with developing a tasting room and process whereby customers could bring food, purchase wine, and socialize in an inviting environment. Teece (2007) described adaptive capabilities as the ability of business owners to adapt, configure, and reconfigure tangible and intangible assets to achieve competitive advantage in a dynamic business environment. The findings indicated that the winery owner carried out adaptations in process and operational methods to bring an innovative approach to the direct-to-consumer distribution channel, which is now the norm in the wine sector.

The participants offered ancillary services and products as alternative revenue sources while promoting their brands and wine products. Integrating other revenue streams into revenue management practices contributes to the achievement of financial goals (Zheng & Forgacs, 2016) and positively impacts customer demand and promote long-term survival of entities (Maier & Intrevado, 2018). All the winery owners in this study offered a range of wine-related accessories such as wine glasses, wine holders, or wine décor products and perishable items including cheese and fruit plates. Furthermore, WIN1 and WIN3 offered for rent tasting room or tent space in the vineyard for private parties.

Customer segment. Findings from the literature indicated that business leaders in many industries managed inventory capacities to meet specific customer segmentation demands (Choi et al., 2014; Vinod, 2015). The participants of this study admitted that they did not have a formalized approach to managing inventory capacities instead exploited the different distribution channel when opportunities arose to increase brand awareness. WIN1 provided an example:

> Depending on how much wine we have of each varietal, we are going to push the higher quantity wines at different outside events, or we are going to try to use those wines to market toward the masses (i.e., wholesale to retail). When you come to the tasting room, you can get your more intricate, more delicate style of wines or aged wines.

Study participant WIN3 acknowledged that they participated in different outside events to generate income and market their wines. However, state regulations limit participation to seven off-site farm winery sales and tastings with special permitting per year (Conn. Gen. Stat. §30-16, 2017 as amended). All participants stressed that they made available all their wines for sale and tasting through their tasting rooms.

For WIN3, meeting the demands of their wholesale network was critical. Because the wholesale network represented 50% of total sales, WIN3 fulfilled wholesale orders first then remaining inventory was available through the tasting room. While this is not a particularly effective inventory management system, WIN3 expressed the following:

> Over the years we developed that network, and it takes a lot of work to keep that going and keep the stores happy so you cannot hold back product. We make the wines available for whatever store orders first.

By effectively and efficiently offering inventory through various distribution channels to specific customers, business owners could maximize profits as Vinod (2015) postulated.

The study participants recognized that customers' attitudes and behaviors toward wines have shifted. WIN2 and WIN3 noted customers have become more knowledgeable and could differentiate among the grape varietals in making purchase decisions. Pomarici, Lerro, Chrysochou, Vecchio, and Krystallis (2017) noted that knowledgeable wine enthusiasts were willing to pay more than uninformed customers. All participants highlighted efforts to attract these knowledgeable customers through offering quality products and services, thus building their customer base.

Wine experience. All participants of this study often mentioned location, atmosphere, and family-owned winery as contributors to their success. The study participants recognized the importance of the geographical location to building its brand and promoting long-term survival. WIN2 noted that its winery location is conveniently located near the interstate thereby easily accessible for winery tourists. WIN2 added further, "You can replace the buildings, you can replace the wines very easily, but the location is static." Also, WIN1 and WIN2 acknowledged the benefit of being situated near towns that support other desirable amenities. Accordingly, this view supports research findings of McCole et al. (2018) which indicated that wine tourists who visited wineries regions for recreational experiences rather than wine purchases spent a significant amount of money during their visits to the tasting room.

Based on my observations, each winery owner provided a welcoming and relaxing environment. While WIN2 has a much larger tasting room, all study participants made available tables and chairs for indoor seating as well as seating areas outside so visitors could see the vineyards. Back et al. (2018) postulated that small-farm winery owners have increased offerings beyond wine products that resonated with wine tourists to promote wine sales. In addition to offering wine tasting to attract visitors, all participants provided free tours of their wine cellars and production facilities. Participants WIN1 and WIN2 hosted regular activities throughout the year. For example, WIN1 hosted weekly chocolate and wine pairing tastings that guests paid $20, as well as holiday-themed events with special pricing depending on the wine, food, and entertainment provided (Retrieved from the event calendar for WIN1). WIN2 offered weekly Friday Night Music with live entertainment between 5 and 8 p.m., the traditional happy hour time (Retrieved from the event calendar for WIN2). WIN2 added:

> For us to survive, we have to give consumers the experience. People work in an office or a factory and spend most of their time inside of a building. So, it is nice for them to come out to the vineyard especially in the summertime.

Researchers have noted that owners must commit time, capital, and other resources when adding new dimensions to their agricultural business diverting resources away from their core business, negatively impacting farm operations negatively impacting agricultural operations (Liang & Dunn, 2016; Ullah et al., 2016; Veeck et al., 2016). WIN1 supported this view and expressed:

> We do not do a lot of events here because there is a huge amount of energy that you have to put into running an event well. That takes away from growing the grapes. When you have to get up at 7 a.m. to be out in the vineyard, you do not want to be up to 2 a.m. running an event.

Study participant WIN3 refrained from offering special events or non-agricultural activities because it does not fit their business model. WIN3 stated, “This is really a showplace, not a catering business.” All participants indicated that providing a positive wine visitor experience was an important factor to both building their brand and sustaining long-term survival. Also, participants acknowledged that the owners’ presence in the tasting room augmented the customer experience.

All three participants of this study are family-owned and operated enterprises. Evidence indicated that the breadth and depth of knowledge that operators of family-owned firms gain over the years is a unique resource that determines an enterprise’s competitive advantage within the DC framework (Jones et al., 2013; Teece, 1997). The results of this study corroborated the importance of leveraging knowledge and experience to promote exceptional wine experience as a way to build a relationship with the customer, thereby support long-term survival. WIN3 described:

> As a family-owned small winery, we present the whole package. My father, my brother, my daughter, and I work the tasting bar. We work the vineyard, and we make the wine. Visitors are talking to the people who make the wine. We tell stories during the tasting. This is why people like us so much.

WIN2 expressed the reason for their success is the family-oriented environment they created instead of just another place to come and drink.

Although small-farm winery operations have certain characteristics that make them a suitable candidate for traditional revenue management, winery owners tend to limit the revenue management principles they put into practice (Choi et al., 2014). In this study, all the participants initially set the price points of wines based on grape varietals, expenses associated with the aging processes, and labor, production, and distribution costs, adjusting to the relative price point that consumers were willing to pay. The present study revealed that the small-farm winery owners in this study maintained static pricing and instead focused on optimizing revenue through purposeful inventory allocation through multiple distribution channels.

The significant indicators of revenue management strategy effectiveness among the participants were the number of winery visitors and sales volume. For example, WIN1 tracked the number of tastings daily and compared to the daily average sales to evaluate how often a winery visit culminated into a sales transaction. WIN3 utilized a POS system to track the numbers of visitors to the winery, tastings, and eventually sales per day. WIN2 described comparing current year production and sales levels to previous year's levels as a means to measure success. Researchers indicated that the willingness-to-pay, wine quality, and wine experience are subjective factors influencing the direct impact of revenue management strategy decisions (Duarte Alonso & Bressan, 2016; Ullah et al., 2016; Veeck et al., 2016). Despite these findings, all the participants noted that they experienced a recent decline in revenues due to new entrants into the alcohol beverage industry.

The three participants of this study maintained that leveraging product quality, geographical location, and owners' presence in the tasting room increased customer engagement and encouraged wine purchases. This finding supports the assertion of Cuellar, Eyler, and Fanti (2015) that winery owners' abilities to create brand awareness and pleasurable tasting room experience was likely to build long-term customer loyalty and generate an increase in off-premise retail sales. Each of the study participants serve similar but not identical wine products, have a unique winery story, and use distinct approaches to serve their customers. However, all participants experienced similar constraints and were impacted by the same type of competitors.

Theme 2: Constraints Consideration

Small business owners contend with varying constraints that influence the adoption of revenue management strategies. The more common business constraints are scarce recourses, high operating costs, and increased competition. Researchers noted that small-farm winery owners face additional constraints imposed by federal, state, and local regulatory policies when approaching revenue management strategic decisions (Newton et al., 2015; Tuck et al., 2016; Zatta & Kolisch, 2014). Constraint considerations emerged as a key theme that directed the revenue management strategies implementation. As indicated in Table 4, four specific constraints and the frequency that the three participants identified regarding constraints consideration.

Table 4

Subthemes for Theme 2: Constraints Consideration

Subthemes	*N*	*% frequency of occurrence*
Distribution channels	17	39.5%
Regulatory environment	10	23.3%
Capacity	3	7.0%
Resources and costs	13	30.2%

Note: *N* = number of participant responses linked to the subtheme.

Distribution channels. Small-farm winery operators adopt various distribution channels to sell and market their wine products. According to the literature, small-farm winery owners rely mostly on direct-to-consumer sales such as tasting rooms, wine clubs, Internet sales, and local distribution where profit margins are higher (Duarte Alonso et al., 2015; Bruwer et al., 2015; Sun et al., 2014). Findings from the interviews indicated that all participants limited their direct-to-consumers sales approaches to tasting rooms and local distribution. All three winery owners cited costs and resources prohibitive issues including shipping prices and employees' time in addition to high attrition rate as deterrents to offering a wine club. WIN1 added, "There are a lot of special pricing and incentives, and it takes a long time to make that money back." Internet sales have emerged as an essential method of direct-to-consumer sales; however, small-farm winery owners encounter challenges associated with this distribution channel.

Consistent with the findings of Gilinsky, Newton, and Vega (2016), two of the three study participants indicated that varying state shipping laws and distributor control became an obstacle for Internet sales therefore not a financially feasible route for direct-to-consumer sales. WIN2 noted that some states allow direct shipment of wine to consumers from in-state wineries but restrict direct shipment from out-of-state wineries. To overcome the costs and resources associated with compliance with state shipping laws, filling Internet sales orders, and shipping the wine products WIN1 explained, "the sales volume has to be higher." However, the winery owners were reluctant to allocate inventory across the different distribution channel before knowing customer demand.

The distribution channel decisions are especially challenging for small-farm winery owners. Specifically, some owners of small-farm do not rely on wholesalers or distributors because of their lack the resource capabilities to attain and sustain profitability through the three-tier system (Elias, 2015; Santiago & Sykuta, 2016). The findings of this study revealed that only one winery owner (WIN3) used the wholesalers, deriving 50% of its sales revenue from this distribution channel. WIN3 has operated their winery over 30 years and over this time has developed a robust wholesale network. WIN3 explained, “Because our winery is located off the beaten path and being a small winery physically, we always had a wholesale network.” The winery owners’ choice of revenue management strategies is dependent on an optimal mix of distribution channels.

Regulatory environment. Owners of small-farm wineries cannot adopt effective revenue management strategies without recognizing and considering significant regulatory elements. The small-farmer winery operator must comply with all federal and state licensing and permit requirements as well as municipal zoning codes related to the production, sale, and distribution of wine products (27 U.S.C. §203, 2016; Reynolds & Knowles, 2014; Santiago & Sykuta, 2016). As previously presented, the three-tier distribution system and other state shipping laws influence what modes of distribution winery owners utilize. All participants acknowledged that working within the regulatory guidelines often reduced their ability to seize opportunities arising in the marketplace.

During the interview process, the winery owners discussed regulatory issues related to business operations and ancillary services. Since all participants of this study rely predominantly from on-premise sales through their tasting rooms to generate revenue, they felt hindered by state and local regulatory policies. WIN2 explained, “we cannot sell wine or offer tastings past 8 o’clock, we cannot sell food or other drinks, so it limits what we can do.” Also, the three study participants mentioned state and local zoning laws restricted the number and type of events owners might conduct on- and off-premises thus curtailing their ability to generate revenue from alternative sources. These findings conform to the view of Boncinelli et al. (2016) of the adverse effects on farm owner’s diversification decisions because of zoning regulations limiting the number of on-farm non-agricultural activities each year and capacity cap.

Though the small-farm winery owners in this study have been successful in developing revenue management strategies for long-term survival, some of the participants raised concerns how pending new legislation, a minimum wage increase, and $.25 deposit on wine bottles, would impact their profitability. Two of the three participants indicated they were developing strategies to anticipate the best way to distribute the additional costs of compliance to customers without affecting demand. Business leaders who proactively engage in sustainable development opportunities could improve responsiveness to environmental changes through DC (Teece et al., 1997). The winery owners that can study the environment, evaluate the market conditions, and make changes through persistent and repeatable adjustments of an organization’s resource base could create short-term economic benefit and long-term survival.

Capacity. Like hotels rooms or airline seats, small-farm winery owners also have daily opportunities to reach full capacity in their tasting rooms (Abrate & Viglia, 2016; Malasevska & Haugom, 2018). However, unlike hotels and airlines, winery visitors do not make reservations; therefore, owners of the winery cannot estimate the number of visitors they expect each day. During the direct observations, the researcher noted that the tasting room of each winery was part of the space in which the owners manufactured, processed, bottled, and sold wine products. Two participants of this study (WIN1 and WIN3) cited the lack of capital resources and restrictive zoning ordinances as limitations to their ability to expand existing tasting rooms or expand ancillary services offerings. With the capacity of 26 and 35 for WIN1 and WIN3 respectively, the owners acknowledged that if there was no room in the tasting room, then the visitors were turned away. The visitors would leave the winery and try their luck at another winery.

One study participant, WIN2, was an exception. This winery owner operates a large tasting room with two tasting stations and the capacity to hold 220 people. As previously noted, WIN2 utilized the tasting room as the sole distribution channel of its wine products. In support of its business model, WIN2 was in the process of constructing an outside deck area to expand capacity to accommodate more visitors, especially during the harvest season and weekends. WIN2 stressed the importance of expanding the tasting room to attract wine tourists and facilitate return visits which confirmed the study findings of Byrd et al., (2016). Moreover, once the tasting room is at capacity, winery owners need to ensure wine products are readily available for sale or consumption as well.

In this study, the wineries average production levels ranged from 5,000 to 9,000 gallons (See Table 1). Because of the low production levels, the winery owners are unable to expand inventory availability in the short-term in response to increased customers demand as Bujisic et al. (2014) suggested occurs in the beverage industry. Some of the participants of this study sustained out-of-stock situations, WIN1 6 out of 24 wines and WIN3 5 out of 15 wines (The Wine Collection, WIN1; Wine Tastings, WIN3), and customers often did not switch to other varietals, resulting in lost revenue and the missed opportunity to establish brand loyalty. The winery owners in this study did not actively apply dynamic pricing to wine sales through the tasting room but instead focused on educating customers and enhancing their wine experience.

Resources and costs. All participants mentioned that labor, operating costs, and cash flow were typical constraints they must overcome to optimize profits and promote long-term survival. This finding is consistent with literature from Liang and Dunn (2016) that suggested farm operators need to reconstruct or transform available resources to minimize the impact of these certain constraints to sustain long-term survival. WIN1 shared:

> We buy everything in bulk – by trailer load or truckload to cut down on shipping costs. So, for us projecting out how much we are going to produce, in turn, helps us because we have to order bottles, labels, everything else all at the same time as we can get the best price.

As a business with a seasonal cycle, the winery owners recognized the need to be resilient and strategic to manage their resources effectively.

Through the examination of each winery website, I discovered that all winery operations in this study remained open all year round despite the seasonality of the business. All study participants reduced hours of operation during the off-season, typically January through April, to contain costs. Furthermore, some participants reported dynamic strategies to combat the adverse consequence of the seasonality issue similar to the findings from Pham, Driml, and Walters (2018). WIN3 offered discount coupons on purchases between January and April. WIN3 reasoned, "I need to generate some revenue and cash flow in the off-season. Bills don't go away." Also, all participants participated in the *2019 Connecticut Winter Wine Trail* that the Connecticut Farm Wine Development Council devised to promote Connecticut agricultural tourism during the winter months.

The three participants of this study agreed that labor was the most significant resource constraint affecting revenue management strategy decisions. As Golic et al. (2016) noted from their study findings wine businesses have a high level of fixed costs so controlling variable costs such as labor was crucial to an entity's long-term survival. WIN1 stated, "You need people behind the bar to serve the people to build the brand. Others are out in the vineyard taking care of the vines. We need people in the production room." Because the growing vines and producing wines is a labor-intensive process, the study participants limited the non-agricultural activities to their enterprises to maintain the proper level of resources directed toward their core agricultural business. Furthermore, WIN1 invested in new equipment to automate grape harvest that will reduce seasonal labor needs and new processing equipment to increase efficiency and reduce waste in the production process.

Theme 3: Competitors' Impact

Competitors' impact is the third theme of this study. The common consensus among all study participants was they were facing increased competition from other wineries, importers, and other beverage enterprises. Table 5 displays the three subthemes or components related to competitors' impact in relation to winery owners' revenue management strategies, and the frequencies of occurrence. According to all participants in the study, the most significant competitor to small-farm wineries was the micro-breweries.

Table 5

Subthemes for Theme 3: Competitors' Impact

Subthemes	*N*	*% frequency of occurrence*
Other Connecticut wineries	4	23.5%
Importers	3	17.7%
Other beverage enterprises	10	58.8%

Note: *N* = number of participant responses linked to the subtheme.

Other Connecticut wineries. Currently, there are 41 licensed wineries in Connecticut (DOAG, 2019). WIN1 stated, with the emergence of new wineries in the area, some visitors did price shop. Moreover, WIN3 noted that several of the new wineries maintained the minimum required acreage, five acres, to be classified as a farm winery (Conn. Gen. Stat. §08-187, 2008). The owners were instead investing millions of dollars into elaborate full-service facilities to attract visitors (WIN3). WIN3 asserted that:

> Before there were only small wineries that did not impact us. Now there are some big flashy facilities. That has impacted us because when some people choose to visit one of 41 wineries, they tend to choose the new wineries that serve food and have entertainment.

WIN2 possessed mixed feelings about whether or not small-farm wineries owners compete with each other. WIN2 shared that in-season when more visitors arrive, all the wineries benefit. However, on slow days during the off-season winery owners compete for visitors (WIN2). WIN2 concluded:

> Having other vineyards is good because it brings more people into the area. Also, it keeps the ownership a little more focused – you are not the only winery on the block. You have to make sure you are on top of your game.

Finally, all participants agreed that other Connecticut wineries have limited influence on their pricing structure. As previously noted, the study participants considered certain other factors other than competitors' pricing in the development of pricing strategies. The findings substantiated the view of Dre and Nahlik (2017) that industry direct competitors have limited influence on pricing strategies rather consumers' perception of price unfairness could negatively impact consumer behavior toward future purchases.

Importers. Several countries including Argentina and Chile have steadily gained market share in the U.S. (Govindasamy, Arumugam, Zhuang, Kelley, & Vellangany, 2018). WIN1 pointed out that Argentina and Chile are the top importers of wine into the U.S. with very low-price points on their products. The participants of this study had an average price of $23 on their wine products with a low of $16.99 to a high of $37.99, depending on the varietal (Wine List of WIN1, WIN2, and WIN3). WIN3 pointed out that "loyalty to the local wine will only go so far" when consumers go to a package store and compare a $9 Chilean wine to a $23 Connecticut.

Additionally, WIN1 noted that competing against other countries in the wholesale market was getting tougher. Wholesalers increase the price wine products typically in the 30% range over what they pay when selling to retail outlets (WIN1). The retailers will also add a markup to the prices necessary to make a profit. WIN1 stated "to balance consumers' expectations when they come to the tasting room but still keeping yourself competitive against other products in the market" small-farm winery owners needed to keep the markup layers in mind when establishing the price of wine products for sale on premises. Because of the struggle to compete against imports from other countries, WIN2 decided it was no longer financially feasible to distribute wine products to retail outlets.

Other beverage enterprises. Researchers reported that craft beverage breweries and distillers in the U.S. had grown dramatically in recent decades with a large concentration of breweries in the Northeast Corridor (Carr, Fontanella, & Tribby, 2019; Nilsson, Reid, & Lehnert, 2018). All study participants disclosed the difficulties of competing with local breweries for several reasons. First, brewery owners can release in a shorter timeframe, new products to meet consumer demand. Conversely, wine production takes place over an extended period from planting to producing wine thus delaying distribution (West & Taplin, 2016). As WIN1 pointed out "We get one harvest. We get one shot to make a product". The winery owners face the challenge of anticipating 2 to 3 years ahead customers' expectations and acceptance of new products to maintain a competitive advantage.

In the literature, researchers noted that many owners of small-farm wineries typically operate in rural geographical areas and have limited resources to attract visitors

(Byrd et al., 2016; Liang & Dunn, 2016; Van Sandt & McFadden, 2016; Villanueva & Moscovici, 2016). Conversely, many brewery districts are emerging in the center of cities and industrial neighborhoods that are easily accessible to residents and well-situated to lure new customers (Nilsson et al., 2018). WIN3 validated these findings stating "They are right on Main Street. They are in the most choice areas in every city and metro area and places consumers want to be." To attract wine tourists and promote their products, all three winery owners stated that by participating in the Connecticut wine trail program they could work collaboratively in a competitive market to their mutual benefit.

Finally, brewers have a more favorable legal environment in which to operate. Under CGS §30-16(h) (2017 as amended), brewers who possess a manufacturer permit for beer and brewpub can sell products in their taprooms beyond the brewery capability, which include wines and ciders. WIN1 highlighted:

> We are competing to attract people who want beer and wine. The people who want to drink wine will come to the winery; people that want to drink beer will go to a brewery. Where at a brewery now people can do both. It's keeping the market share. You only have so many people that drink. What are they drinking? When are they drinking? How are they drinking it? It is changing daily.

Also, customers can purchase beer in grocery stores in Connecticut but not wine. All participants expressed frustration at the disparity of opportunities for winery owners to bring their products to new markets and increase the visibility of their products.

One fundamental tenet of the DC is a business leaders' ability to sense changes in the environment and quickly reconfigure or transform organizational resources to differentiate themselves from competitors (Teece, 2009; Teece et al., 1997). Organizational resources such as technological assets, financial assets, physical assets, and managerial prowess can influence profitability and long-term survival (Teece, 2018a). Because winery owners need to operate within regulatory guidelines, all three participants stressed optimizing cost reduction, niche products and services, and capital investment to leverage environment conditions. Furthermore, since the winery owners have restricted access to distribution channels, all participants have developed specific management strategies that enabled them to compete at a pace that fits their capacity. As WIN3 stated, “We found an equilibrium where we can be comfortable, but we are always looking for that next big break.”

Applications to Professional Practice

I conducted a qualitative multiple case study to explore the revenue management strategies some owners of small-farm wineries use to sustain long-term survival in a regulated industry. The three themes arising from this study were (a) focus on brand and customer base, (b) constraints consideration, and (c) competitors’ impact. Gilinsky, Newton, and Eyler (2017) discovered changes in internal and external environments including, customer relationships, brand awareness, regulation and taxes, and distributor controls influenced a firm’s strategic orientation. The findings of this study add to the existing literature by providing insights into what factors drove small-farm winery owners’ revenue management strategy decisions and enhanced DC to sustain long-term survival. Applying study findings, owners of small-farm wineries might quickly discern competitors’ potential impact on operations and bolster their capabilities to effectively employ limited resources and adhere to regulatory requirements to remain competitive customer and sustain long-term survival.

Small-farm winery owners face many constraints that influence the implementation of revenue management strategies. Velikova, Canziani, and Williams (2019) discovered price points constraints, capacity limits, and time and people resources as critical challenges for small wine producers. Results from my study certainly also fit in with those findings but also included the need to work within regulatory guidelines as a critical challenge. The findings are relevant to professional practice, as owners of small-farm wineries may gain practical insights on how to adapt business practices and turn constraints into opportunities aimed at product quality, exceptional service, and costs control that may sustain long-term survival.

Competition in the alcohol beverage manufacturing industry is pervasive. Understanding how to explore and exploit unique resources and capabilities from a DC perspective, small-farm winery owners can successfully deploy revenue management strategies to gain competitive advantage. However, Valtakoski and Witell (2018) emphasized that not all capabilities impact firm performance equally, and competitive environments affect the importance of different capabilities. Therefore, owners of small-farm wineries should carefully consider the current business environment before investing scarce resources into alternative revenue management strategies.

Implications for Social Change

The findings of this study have the potential to enhance long-term survival of small-farm wineries. By implementing revenue management strategies that attract and retain customers, owners of small-farm wineries may be able to remain viable financial contributors to the local communities. According to Baù, Chirico, Pittino, Backman, and Klaesson (2018), as business leaders build their commitments to the local communities, they may be further motivated to grow. Expansion and sustainability of small-farm winery enterprises could enhance the economic vitality of a community. Creating job opportunities, paying more federal, state, and local taxes, and stimulating other small business development contribute to positive social change.

Key management strategies are necessary to influence profits and improve agricultural business performance. Researchers have found that prioritizing management strategies toward controlling operating costs, setting optimal selling prices and production levels, allocating resources effectively, and utilizing multiple marketing channels improved agricultural business performance (Bauman, McFadden, & Jablonski, 2018; Lai, Widmar, Gunderson, Widmar, & Ortega, 2018). Results from this research were consistent with many aspects of previous researchers' findings and might provide a basis from developing key management strategies for implementing revenue management initiatives, overcoming constraints challenges, and mitigating competitors' impact. Successful management strategies could be potentially crucial to the long-term survival of small-farm wineries located in rural communities. The long-term survival of these enterprises may lead to economic prosperity for the local community and financial stability of community residents.

Recommendations for Action

The purpose of this qualitative multiple case study was to explore the revenue management strategies some small-farm winery owners use to sustain long-term survival. Currently, owners of small-farm wineries in Connecticut are facing increased competition, high operating costs, and federal and state regulatory issues. Because of economic, social, and regulatory influences, implementation of successful strategic management practices such as revenue management is crucial to sustaining long-term survival. From the valuable commentary, observations, and review of organizational documents and entities' websites, several logical recommendations transpired from the consideration of this research study.

The participants of this study focused on non-pricing decisions in applying revenue management strategies with minimal emphasis on product pricing strategies. Mou, Li, and Li (2019) described inventory capacity allocation as a non-pricing strategy, business owners use to distribution certain volume of inventory to different customer segments and was the primary non-pricing strategy the participants of this study utilized. Small-winery owners may consider implementing product pricing strategies to optimize revenue, profit, and customer value. The recommendation that I offer is the owners could offer promotional product pricing, setting a lower price than usual, to persuade winery visitors' purchasing decisions. Nair (2018) postulated that a promotional pricing strategy could contribute to customer demand and their ability to differentiate the product among the competitors.

A second recommendation for action is owners of small-farm wineries should utilize better available technology to analyze customers' purchases by distribution channels to gain insight on its inventory control allocation effectiveness. By understanding purchasing patterns of wine consumers, winery operators may develop more targeted pricing strategies as well as improve ancillary services and events to promote frequency of purchases and optimize revenue stream (Abrate, Nicolau, & Viglia, 2019; Kumar, Bezawada, & Trivedi, 2018). Owners of small-farm winery operations should evaluate the related costs and potential benefits before investing limited resources into a new operational process.

My final recommendation is for small-farm winery owners to reconfigure their existing business model. Bolton and Hannon (2016) suggested that business model reconfiguration provides stability for growth by adding new activities, integrating activities in new ways, or altering ways of conducting transactions among the value chain participants of an enterprise. Incremental changes to an existing business model can help business owners to achieve higher revenue, better operating profit, and garner customer base (Biloshapka & Osiyevskyy, 2018). Regulatory issues, new entrants into the alcohol beverage industry, and high operating costs induce the need for winery owners to reconfigure their existing business model to engage the next generation of customers to promote long-term survival.

An important aspect of any scholarship is disseminating research results widely and to an audience where research findings can have the most significant impact. I will provide the participants of this study with a summary of the findings, recommendations, and conclusions. Further, I will conduct a presentation to the Connecticut Farm Wine Development Council during a regularly scheduled council meeting to reach other small-farm winery owners in the state. Finally, I plan to present the research study at an academic conference and submit for publication in an academic journal.

Recommendations for Further Research

Conducting this qualitative multiple case study with a small sample of small-farm winery owners in Connecticut provided a valuable opportunity to explore the revenue management strategies some owners of small-farm wineries use to promote long-term survival. A small number of interviews can be sufficient to capture broad thematic issues in data; however, a researcher may need a larger sample size to explain complex phenomena or complex theory (Hennink, Kaiser, & Marconi, 2017). Further research could include expanding the number of participants or the geographical location to attain additional insights into how these small-farm winery owners sustained long-term survival in a regulated industry. Additionally, I adopted a qualitative multiple case research design for the study; future researchers could adopt a different research methodology and design, which may uncover different success strategies and enhance the generalizability of the findings.

Moreover, researchers suggested that business owners must develop and integrate appropriate business strategies to sustain long-term growth (Adams, Kauffman, Khoja, & Coy, 2016). As this study included only the revenue management strategies some owners of small-farm winery implemented, I recommend further exploring other business strategies small-farm winery owners used to promote long-term survival of its enterprises. Researchers could consider exploring specific business strategies with a focus on each of the broad themes identified through this study.

Reflections

The decision to pursue a DBA came after many years of forethought and deep contemplation. After accepting my first academic position 15 years ago, I am close to earning a doctoral degree that I believe will be a tremendous accomplishment in my academic career. As I progressed through the coursework, I noticed an improvement in my academic writing and discovered my scholarly voice. I expanded my research skills acquiring a deep understanding of foundational theories that I can apply to future research.

I have an analytical and technical mindset developed through my professional experience in the public accounting industry. My career as an external auditor influenced my competencies in analyzing and interpreting both financial and non-financial data. As a technically trained professional, I felt prepared to conduct a rigorous academic study successfully using the quantitative approach. However, as I progressed through the DBA program, I came to realize that qualitative research offers unique opportunities for understanding complex, nuanced situations where multiple interpretations exist. Though many academics view quantitative research approach as a more rigorous experience within a DBA Doctoral Study process, I chose to use the qualitative method for this study to emphasize the holistic perspective of the business problem under this study.

My motivation for selecting this study topic was personal interest in the growing number of small-farm wineries in Connecticut. I was interested in understanding how owners of small-farm wineries sustain long-term survival through successful revenue management strategies. I was pleasantly surprised by how willing each winery owner was to participate in this study. The participants responded candidly to the interview questions. I expected that resource constraints would limit what business strategies and practices the participants could implement. Remarkably, the participants exhibited a deep passion and entrepreneurial spirit in overcoming the unique challenges of running a small business in a regulated industry. The study enhanced by my understanding of small-farm winery operations, and I hope to conduct further research on the efforts of owners of small-farm wineries to promote long-term survival.

Conclusion

The participants of this study are owners of small-farm wineries in rural areas of Connecticut. Each participant exhibited a passion and dedication to producing high-quality wines products and sharing their story and educating winery visitors about their wines. The impacts of operational constraints and competition on winery activities have increased, making it a challenge for small-farm winery owners to remain profitable and sustain long-term survival. In this study, I explored revenue management strategies some owners of small-farm wineries implemented to enhance financial performance to sustain long-term survival. Because of the unique business characteristics of the wine sector, the owners did not utilize all traditional revenue management practices but instead implement those practices that best aligned with their existing business models.

The findings of this study revealed that successful small-farm winery owners knew how to adapt operational methods and processes by leveraging their limited resources to create value for their customers. Furthermore, all the winery owners in this study emphasized the importance of leveraging knowledge and experience to promote exceptional wine experience as a way to build a relationship with the customer, thereby support long-term survival. Small-farm winery owners should bear in mind that revenue management is not a standalone operational strategy but rather a dynamic tool that owners can utilize in combination with other internal processes to meet customers' needs, overcome operating and regulatory constraints, and mitigate competitors' impact.

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Appendix A: Approval Letter to Use Copyright Material

Dear Marie,

Yes, of course you can.
Please, let us know the results of your Research.

Regards,

[redacted]

Hi Marie,

Thanks for your interest in the paper I have written. Please feel free to use the image of the Dynamic Capabilities Framework as presented on page 58. As long as you cite the author, there is no problem. It's an honor to be cited by you.

If possible, please send me your doctoral dissertation when you finished it. I am also interested in your papers about dynamic capabilities.

I have tried to send you a LinkedIn invitation to connect with you. But there are two people with the same name and I am not sure if one of them is you.

My Linkedin profile is [redacted]

Best regards,

[redacted]

2018-05-20 19:22 GMT-03:00 Marie G. Kulesza <marie.kuleszа@waldenu.edu>:

Dear [redacted],

My name is Marie Kulesza and I am a doctoral student in the Doctorate of Business Administration at Walden University. The reason for this email is to request permission to use the image of the Dynamic Capabilities Framework as presented on page 58 of your article "Dynamic Capabilities: What Are They and How to Identify Them?" published in Revista de Administracao Contemporanea, 2014. Your consideration of my request is greatly appreciated.

Best regards,

Marie Kulesza

Appendix B: Interview Protocol

Participant Code: ______________ Date of Interview: ________________

Interview Mode: Face-to-Face Contact Number: _________________

Research Process Notes:

- Introduce self to the participant.
- Explain the purpose of the study to the participant.
- Present consent form, address questions and concerns of participants, obtain signed informed consent form. Give participant copy of consent form.
- Assign participant code to ensure confidentiality.
- Audio record the interview using assigned participant code to introduce participant and label data.
- Observe and note non-verbal queues.
- Ask follow-up probing questions to obtain more in-depth information.
- Discuss member checking process with participant.
- Conclude interview thanking participant for the time and contribution to the study.

Interview Questions

1. What are the key revenue management strategies that you implemented to promote long-term survival?
2. What factors or information do you take into consideration before making revenue management strategic decisions?

3. How significant is the competitive environment with respect to the revenue management strategic decision-making process?
4. What barriers have you encountered when trying to implement revenue management strategies?
5. How did your implementation of revenue management strategies affect the profitability and long-term survival of your small-farm winery business?
6. What additional information would you like to share regarding revenue management strategies successful owners of small-farm winery operations implement to promote long-term survival?

Follow-up Member Checking Process

- Share copy of succinct synthesis for each question in the interview via follow-up interview.
- Instruct participant to thoroughly read each question and each interpretation.
- Participant approve the data interpretation and verbally confirms.
- If participant finds reason to correct, clarify or make addition to the interview, the researcher will document the revisions.

Appendix C: Participants Recruitment Email

Dear [Owner of Winery],

My name is Marie Kulesza, and I am a doctoral student pursuing a Doctorate of Business Administration (DBA) at Walden University. To fulfill the requirements of the DBA program, I am conducting a doctoral research study that results in new knowledge, insight, or practice to address a business problem. My research topic is to explore the revenue management strategies some owners of small-farm wineries use to sustain long-term survival by using a multiple case study of small-farm wineries located in Connecticut. The contribution of this study is to provide owners of small-farm wineries with a better understanding of how successful revenue management strategies could contribute to long-term sustainability of their operations.

I am seeking to interview small-farm winery owners who fit the following criteria:

- Must have owned and operated a small-farm winery for at least 10 years;
- Must hold CT Grown designation from Connecticut Department of Agriculture;
- Must have successfully implement revenue management strategies.

During the course of this study, I will conduct a face-to-face interview with the participant. The interview will include six open-ended questions (attached with this email) that you can provide your unique perceptive and understanding on this research topic. At the end of this study, I will share results and findings with the participants, other small-farm winery owners, and other scholars. Participation in this study is voluntary and confidential.

If you meet to above criteria and interested in participating in this valuable research, please reply to this email. If you are interested in participating in this valuable research, please reply to this e-mail with your interest. Upon receiving your reply of interest, I will contact you via telephone to provide additional information related to the research process and schedule the face-to-face interview at a time and location of your convenience. Please read the enclosed consent form carefully and ask any questions that you may have before accepting the invitation.

I appreciate taking the time to consider this invitation.

Sincerely,

Marie G. Kulesza, CPA, CMA
Doctoral Candidate
Walden University