

Developing a Wine Experience Scale

Subjects: Management

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This study develops a scale to measure wine tourism experiences and was tested in Portugal, in Porto and Madeira wine cellars. The resulting 18-item wine experience scale comprises four major dimensions: (1) Wine storytelling, (2) wine tasting excitement, (3) wine involvement, and (4) winescape. This is the first scale that comprises the dimensions of experience with wine senses, applied in a relevant wine destination where research is still limited. The results are relevant in boosting the increasingly recognized awareness of Portugal as wine tourism, as well as bringing experience scales to the body of knowledge.

Keywords: scale validation ; SEM ; wine storytelling ; wine tasting excitement ; wine involvement ; winescape

1. Introduction

Portugal is recognised as a wine tourism destination and has growth potential. In 2019, the tourism revenue contributed 8.7% of the national GDP, with an increase of 8.1% in tourism revenue growth ^{[1][2]}. Wine tourism directly contributes to the wine regions' economic development ^[3]. The 4th UNWTO Global Conference on Wine Tourism (2019), themed 'Co-creating Innovative Experiences', sought to further explore issues related to wine tourism experience for international comparability between destinations. Although Porto and Madeira wines are internationally renowned, there is still limited empirical research on its experience-based wine tourism. It is noteworthy that the Porto wine vines in Douro became the first wine-growing area in the world to be legally regulated in 1756, although the name Porto was already in use from at least 1619. The history of Madeira wine is at least 200 years old, although vines had been planted since the fifteenth century by order of Henry the Navigator. This makes these two wine regions the most historically significant regions for fortified wines not only in Portugal, but also globally. They are both fortified wines, which means that they are wines to which brandy was added during its winemaking process, normally for conservation and strengthening purposes. They are part of a broader family that includes Sherry, Marsala, Vermouth, and the also Portuguese Moscatel de Setubal. Portugal is the 11th biggest wine producer but the 9th wine exporter in 2018, with an increase of 5% in volume (3 million hl) and an increase of 11% in value (0.8 billion €) ^[4]. The Porto wine, after some years of declining sales, had, in 2019, an overall increase in sales of 2.5% in volume, although in value it decreased -1.5%. In the domestic market, it had an increase of 3.6% in value despite a decrease of -0,5% in volume. However, in 2020, in the midst of the Covid-19 pandemic crisis, between January and June, it declined -12.4% in volume and -15.4% in value, compared with the same period last year ^[5]. The Madeira wine also had a decrease of -15% in volume and -19% in value over the same period. This wine had its best year ever in 2018 with over 19.2 million € in value, but with a decrease of -2.9% in value and -6% in volume already in 2019 ^[6].

In the context of wine tourism, wine-related experiences are a central concept in which the determinants of the success of a wine region emerges through the selection of the customer hedonic concept as an indicator ^[7]. Wine products offer a wide range of different experiences including wine-related travel, known as an indicator of the wine tourism experience. Wine tourists may travel in search of specific wine tourism experiences, such as visits to the cellars, wineries, vineyards, wine tasting rooms, and/or wine hotels in order to experience an amalgam of different wine-related activities. Therefore, the wine tourism experience comprises the interplay of many factors such as wine tastings, staff, cellar door visits and sales, entertainment, education, and aesthetics ^[8].

As Hall et al. ^[9] argued, wine is seen as an imperative component of the attractiveness of a wine destination. These activities include a set of opportunities in different life domains based on lifestyle and personal experience ^[10] (p. 152) the opportunity to purchase wine and to learn more about wine ^[11], and other wine related matters ^{[12][13]}, opportunities for social interaction ^[14], and communing with others and the opportunity to relax ^{[12][13]}. "A favourable winery experience eventuates when a wine tourist engages in a positive interaction with these wine attributes ^[14] (p. 1). Wine tourism consists of a wine-related activity that integrates wine culture and heritage, providing a dynamic and versatile experience through the visit context ^[15]. A visit to a wine cellar includes an aesthetic appreciation of the natural atmosphere, the wine cellar, the cultural and historical context of the wine region, production methods, the search for education and diversity, a

sense of belonging to the cellar, and the search for authenticity ^[16]. To Brás, Costa, and Buhalis, “wine regions can establish themselves as destinations through the full integration of different products combining main attractions: from wine and food to accommodation, events and entertainment activities and many other regional services” ^[17] (p. 1625).

Globally, the dominant literature still has some research gaps in the field of the wine-related touristic experience as the central product and activity of wine tourism. Despite frequent references to the wine tourism experience, when it is associated with the wine experience construct, it remains fragmented. Within the literature, there is still no universally accepted scale that encapsulates all the dimensions of the wine experience. This makes it difficult to examine what attributes and variables should form it. The proposal of a wine experience construct containing the following dimensions: (1) Wine storytelling, (2) wine tasting excitement, (3) wine involvement, and (4) winescape, appears to demonstrate how wine-related experiences occur simultaneously in the context of a visit. This is the first study that demonstrates the combined use of wine experience dimensions to construct a useful measurement tool, applied to wine experience in wine tourism destinations and wine regions. This measurement approach extends the scope of the existing literature, as there is no scale that measures the wine experience of wine tourists. For instance, there is a lack of consensus about how the wine experience occurs and is perceived in the context of wine tourism activities. Hence, there is an emerging need to develop and validate a new scale addressing the wine experience ^[18]. The original contribution of the paper is to showcase the dimensions that form the wine experience construct, providing its associated originality and the value added. A literature review related to the wine experience constructs follows, and an overview of the construction, development, and validation of the wine experience scale is described and discussed. Finally, the results, implications, and future research directions are discussed.

2. Wine Tourism Experience and the Domain of Constructs

2.1. Wine Tourism Experience

For tourists, food-and-wine activities are a component of their tourism experience while travelling ^[19]. and a wine tourism activity involves the participation of a group of individuals seeking experiences related to wines and wineries within wine tourism destinations ^[20]. Charters and Ali-Knight suggest that “the wine tourism experience can be provided in many ways, the most notable being events and festivals, cultural heritage, gastronomy, hospitality, education, tastings and wine houses, wine sales at cellars/wine houses and winery tours” ^[21] (p. 312). To Pikkemaat et al. ^[22], the wine tourism sector has the potential to create experiences for the tourist, especially those looking for historical and cultural values in iconic places, who appreciate genuine experiences, and who are interested in wine, vineyard crops, wine houses, and what the landscape offers ^[23]. The creation of a tourism experience can be combined through food and culture, for instance in music festivals within wineries ^[24]. A holistic wine experience occurs mainly in the context of a winery visitation, where the tourist experience has a positive effect on their future behaviour intentions ^{[25][26]}. The importance of wine tourism and a hedonic experience is supported by Bruwer and Rueger-Muck ^[7], who advanced that five wine tourist drivers: (1) Taste wine; (2) buy wine; (3) experience the atmosphere; (4) learn more about wine; and (5) find a unique wine, work to achieve a memorable wine tourism experience at a winery cellar door. Thanh and Kirova ^[3], also concluded that experiences are globally positive, and that education and entertainment are relevant when comparing aesthetics and escapism. It is also highlighted that a holistic perspective focuses on the visitors’ experience in relation to wine tourism activities and wine regions. Wine tourism is recognised as a holistic experience comprising of a set of wine region features ^[27], provided mainly by tasting, cellar door, cellar door sales, and winery tours, among others ^[24]. Creating memorable experiences, especially in a new wine region, is the culmination of a several unique experiences ^[28].

The inclusion of wine experience dimensions (wine excitement, wine sensory appeal, winescape, wine storytelling, and wine involvement) is justified as other measurements of wine experience are not just centred on a holistically transversal and also aggregating approach, but encapsulate various stages during a wine tourism visit, allowing a clearer vision of the wine experience. The experiential perspective of wine tourism ^{[23][29]} can be enhanced through hedonistic components that characterise wine ^[9]. In addition, Gómez, Pratt, and Molina ^[30] revealed that there has been an increase in theory building which highlights the complexity underlying the wine tourism experience and, by extension, to the experiential wine tourist. As such, for the final achievement of the following described dimensions, some of the dimensions derived from the dominant literature were included, others disregarded, and others added, considering the underlying holistic component. The dimensions of existing scales are not directed towards the nature of the wine and wine tourism experience. Consequently, a new scale is necessary, as no current scale objectively measures the wine experience. Within this context, this new scale establishes the most effective symbiosis of the dimensions that mirror the various stages of a wine tourism visit. Accordingly, the scale intercepts the main inherent dimensions for a better acquaintance of the holistic and hedonic perspectives of wine and wine tourism experience, which will yield a richness to both conceptual and theory-building research in this field and prove to be useful in wine tourism.

2.2. Wine Excitement

Eating experiences, including the drinking of wine, may convey emotions such as excitement and attract tourists who desire excitement and novelty [31]. Fields [32] and Kim, Eves, and Scarles [33] have indicated that eating local food for the first time is an exciting experience within a destination. Fields [32] demonstrated that physical motivators may also be associated with the opportunity to taste new and exotic foods, and thus local wines may also be part of this experience. Additionally, the exciting experience, while considered as one of the key physical motivators, can be regarded as an event that has excitement as the crucial feature in a leisure activity setting [34]. The place experience is determined by the relationships that exist between tourists, in terms of place excitement and engagement [35]. Kim and Eves [36] also assumed excitement as a motivation to taste local food. Within this context, wine tourists are wine consumers looking for pleasurable winery attractiveness [37], which forms part of the memorable wine tourism experience described by Bruwer and Rueger-Muck.

2.3. Wine Sensory Appeal

Customer experience in tourism also comprises sensory components [38]. The literature highlights multi-sensory stimuli and impressions to understand tourist experiences, and that tourists may be attracted towards a destination by visual elements [39][40][41]. Brochado, Stoleriu, and Lupu [42] suggest that wine tourists accord great value to the multisensory aspect of wine, and they identified twelve themes of sensory experience within Douro wineries: (1) Wine, (2) view, (3) staff, (4) room, (5) hotel, (6) food, (7) restaurant, (8) pool, (9) service, (10) Douro, (11) delicious (food and wine), and (12) comfort. Wine tourism indulges the senses in the wine product itself primarily, involved through the very nature of wine tourism, and influences consumer attitudes and purchases within wineries [43]. Bouzdine-Chameeva and Durrieu [44] suggest sensory stimulation originates in the wine tasting and the winery design. Ali-Knight and Carlsen [45] state that consumer engagement is achieved by novelty and sensory activities in winery settings and was confirmed by Santos et al. [18] where sensory impression [57][61]s impacted on the winery visit experience. [49][50]

2.4. Winescape

The winescape is described as the synergic interaction of “vineyards, wineries and other physical structures, wines, natural landscape and setting, people and heritage, towns and their architecture and artefacts within them” [46] (p. 277). Alebaki and Lakovidou [47] (p. 123) describe winescape as “the whole region and its attributes”. Thomas, Quintal, and Phau [14] also conceptualised seven key attributes of the winescape: (1) The winescape cluster, (2) the atmosphere, (3) the wine product, (4) complementary products, (5) the signage, (6) the layout, and (7) service staff attributes. Dimensions of the winescape include: (1) Nature-related; (2) wineries and vineyards; (3) wine and other products; (4) ambient factors; (5) signage and layout; (6) service staff and locals; (7) heritage-related towns; and (8) fun-based activities [48]. The winescape is also the primary driver of motivations for the wine tourists’ hedonic experience [23] where much importance is placed on the winescape during the visit [49]. Bruwer and Gross [50] advocate that a winescape framework for wine tourism is conceptualised by five major dimensions: Infrastructure, natural setting, atmosphere, layout, and people. The winescape attributes shown above are considered in a multi-layered macro-context of a wine region.

2.5. Wine Storytelling

Moscardo [51] states that central themes and stories impact on tourists and their behaviour. Winery visits by tourists provide wine producers with a communication platform for their brand’s stories, while also showcasing their product portfolio [52]. Winemakers may tell many stories about the wine production: Their families, their heritage, and their winemaking approach. The wine tourist may also evaluate the stories when deciding which wine to buy [53]. Wine-related stories become part of the wine experience and may be relived by repeating the story [54]. As storytelling allows consumers to integrate the story of a wine brand or property [55] and enhance their wine experience, this element should also be measured, as storytelling value adds to the wine tourism experience.

2.6. Wine Involvement

According to O’Neill and Charters [52] winery visits increase the direct involvement with the tourist. The relationship between consumers’ travel and their involvement with wine proves their strong dependence [11][56]. Wine tourism and involvement with wine are described as a consumer experience with a high hedonic charge [11]. Brown, Havitz, and Getz [57] found that the particular interest in a product (wine) has the effect of creating the desire to travel to the place where the product is made. Wine consumers’ product involvement is also equated with their own personal involvement with wine [58]. Yuan et al. [59] maintain that wine consumers’ feelings of importance and relevance towards a product, as well as their genuine level of interest in wine, are determined through a high level of product involvement. Bruwer and Alant [23] offer the view that the wine tourist is drawn to be involved with the wine and region where the wine is produced. Engagement

by individuals in wine tourism is related to a desire to become better acquainted with the wine product and to enjoy an indulgent experience [23]. Sthapit et al. [60] attest that involvement is one of seven experiential tourism factors, significantly influencing the memorability of the tourists' experience.

Wine and wine tourism provide and drive a set of authentic and genuine experiences for wine tourists, which are increasingly differentiated and personalised [61]. Thus, the wine tourism experience is an amalgam of components and features related to wine, with dimensions such as wine excitement, wine sensory appeal, winescape, and wine involvement, which play a crucial role in the wine tourists' experience.

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