

INDUTORES E EFEITOS DO DESENVOLVIMENTO DO ENOTURISMO NAS VINÍCOLAS: A PERSPECTIVA DAS CAPACIDADES DINÂMICAS

DRIVERS AND EFFECTS OF WINE TOURISM DEVELOPMENT IN WINERIES: THE PERSPECTIVE OF DYNAMIC CAPABILITIES

INDUCTORES Y EFECTOS DEL DESARROLLO DEL ENOTURISMO EN BODEGAS: LA PERSPECTIVA DE LAS CAPACIDADES DINÁMICAS

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RESUMO: No contexto organizacional das vinícolas, o enoturismo envolve a entrada dessas empresas no setor terciário da economia, por meio de um conjunto de serviços e atividades turísticas. Este estudo baseia-se na abordagem de capacidades dinâmicas ao propor que as vinícolas propositadamente criam, ampliam e modificam os seus processos, construindo e utilizando capacidades dinâmicas-chave para desenvolver o enoturismo na sua unidade de negócio. Formularam-se dois objetivos para este estudo. O primeiro objetivo é compreender em que medida os níveis de capacidades dinâmicas contribuem para o desenvolvimento do enoturismo nas vinícolas. O segundo objetivo é analisar os efeitos do desenvolvimento do enoturismo no desempenho organizacional. A abordagem *Partial Least Squares* (PLS), o Modelo de Equações Estruturais (SEM) e os dados de uma pesquisa quantitativa são aplicados nas vinícolas da região do Alentejo, Portugal. Este estudo mostra os indutores das capacidades dinâmicas sobre o comportamento das vinícolas para desenvolver o enoturismo e o efeito do enoturismo no desempenho organizacional. O resultado mostra que as vinícolas renovam e alargam as suas capacidades operacionais. Um conjunto de novas capacidades-chave (detectar, aprender, integrar, coordenar e reconfigurar) contribuem simultaneamente, e de forma diferente, para o desenvolvimento do enoturismo. Além disso, o desenvolvimento do enoturismo tem impacto positivo no desempenho das vinícolas.

PALAVRAS-CHAVE: Desenvolvimento do enoturismo. Capacidades dinâmicas. Mudança estratégica.

ABSTRACT: In the organizational context of the wineries, wine tourism involves the winery's entry into the tertiary sector of the economy through a set of tourism services and activities. This study draws on the dynamic capabilities approach to propose that wineries purposely create, extend, and modify their processes by building and using key

dynamic capabilities to develop wine tourism in their business portfolios. Two objectives were formulated for this study. The first was to understand the extent to which the businesses' levels of dynamic capabilities can contribute to the development of wine tourism in wineries. The second was to analyze the effects of wine tourism development on the wineries' organizational performance. The partial least squares (PLS) method, structural equation modeling (SEM), and data from a quantitative survey were applied to the business Alentejo wineries, in Portugal. This study shows the drivers of dynamic capabilities on the wineries' behavior towards wine tourism development, and the effect of wine tourism on wineries' organizational performance. The result shows that wineries are renewing and extending their operational capabilities. A set of new key capabilities (sensing, learning, integrating, coordinating, and reconfiguring) contribute simultaneously and differentially to the development of wine tourism. This development, in turn, is positively impacting the wineries' performance.

KEYWORDS: Wine tourism development. Dynamic capabilities. Strategic change.

RESUMEN: En el contexto organizacional de las bodegas, el enoturismo implica la entrada de estas empresas en el sector terciario de la economía a través de un conjunto de servicios y actividades turísticas. Este estudio se basa en el enfoque de las capacidades dinámicas, proponiendo que las bodegas intencionalmente crean, amplían y modifican sus procesos mediante la construcción y el uso de las capacidades dinámicas clave para el desarrollo del enoturismo en su unidad de negocio. Se formularon dos objetivos para este estudio. El primer objetivo es comprender en qué medida los niveles de capacidades dinámicas contribuyen al desarrollo del enoturismo en bodegas. El segundo objetivo es analizar los efectos del desarrollo del enoturismo en el desempeño organizacional. El enfoque *Partial Least Squares* (PLS), el Modelo de Ecuaciones Estructurales (SEM) y los datos de la investigación cuantitativa se aplican a las bodegas de la región del Alentejo, Portugal. Este estudio muestra los inductores de las capacidades dinámicas sobre el comportamiento de las bodegas para desarrollar el enoturismo y el efecto del enoturismo en el desempeño organizacional. El resultado muestra que las bodegas renuevan y amplían sus capacidades operativas. Un conjunto de nuevas capacidades clave (detectar, aprender, integrar, coordinar y reconfigurar) contribuyen de forma simultánea y diferenciada en el desarrollo del enoturismo. Además, el desarrollo del enoturismo tiene un impacto positivo en el desempeño de las bodegas.

PALABRAS CLAVE: Desarrollo del enoturismo. Capacidades dinámicas. Cambio estratégico.

INTRODUCTION

The existence of wine tourism depends, to a large extent, on a harmonious relationship between the wine industry and the tourism industry (Alonso & Liu, 2012; Iglesias & Navarro, 2014; Telfer, 2001). Studies have identified some problems within this relationship: (a) wineries are not focused on wine tourism as a product; (b) there is a shortage of information about tourism within the wine industry; (c) weak or non-existent integration among wine producers and; (d) weak inter-industry cooperation (Alonso & Liu, 2012; Beames, 2003; Dowling & Carlsen, 1998; Macionis, 1997).

For the wine industry, wine tourism is a way of expanding their businesses; an opportunity to diversify the business. It is also a way to add value to companies' main product, wine (Iglesias & Navarro, 2014). Studies have shown the benefits of wine tourism for wineries, such as increased profitability and sales, improved brand reputation, and product quality, all of which enhance organizational

competitiveness. Wine tourism can also help to educate customers and consumers about wine (Beverland & Lockshin, 2001; Carlsen, 2004; Christou & Nella, 2010; Dowling & Carlsen, 1998; Stavrinoudis, Tsartas, & Chatzidakis, 2012). There are some wineries that recognize wine tourism as an opportunity for their business survival (Hojman & Hunter-Jones, 2012), even though this activity/segment may be of secondary or tertiary importance for the company (Iglesias & Navarro, 2014). In contrast, there are wineries that achieve very limited direct benefits from wine tourism, or no benefits at all (Alonso & Liu, 2012).

In the organizational context, wine tourism requires wineries to enter the tertiary economic sector by providing a set of tourism services and activities alongside their main activities, i.e. agriculture and wine production. However, the productive environment of the wine industry and that of the tourism industry are at opposite poles of the industrial spectrum (Carlsen, 2004) and there are specific economic conditions applicable to wine and tourism; these characteristics are inherently diverse from one another, in microeconomic sense of supply, demand, product/service, income/profit, growth, quality assessment, etc. (Carlsen, 2004). This may explain why wineries, in general, are strongly product-oriented, but have little knowledge about tourism (Dowling & Carlsen, 1998; Iglesias & Navarro, 2014; Macionis, 1997).

There are still many questions about the nature of development of the wine tourism business in these organizations (Carlsen, 2004; Dowling & Carlsen, 1998; Getz, 2000; Hall, Sharples, Cambourne, & Macionis, 2002). The literature still cannot explain how wineries need to adapt their businesses to accommodate wine tourism. This study seeks to fill this gap, proposing that by extending their activities to the service sector, through the addition of wine tourism alongside their primary activity of wine growing, wineries are engaging in an innovative process that involves making changes to their internal processes and learning to develop new activities. In other words, adding wine tourism requires new routines, processes, and organizational capabilities, and wineries need to adjust/change their business models to incorporate this new branch of activity.

This study attempts to show that wine tourism results in many changes to the processes, organizational structures, decision-making, and strategic capacity

of organizations, to meet the needs of wine tourists. Examples might include moving endogenous resources to create accommodation units from existing infrastructure (traditional historic buildings), or adapting and using spaces for tourism that were previously used only for agricultural activities. Thus, wine tourism involves a process of strategic change process that can impact and change the business model of these organizations, enabling them to combine production and manufacturing (agriculture-oriented wine production in the wine industry) with wine tasting events in their cellars (service-oriented in the tourism industry), that provide a wine experience for visitors (Carlsen, 2004; Iglesias & Navarro, 2014; Zamora & Barril, 2007).

Through the dynamic capabilities approach, the first aim of this study is to understand the extent to which their levels of dynamic capabilities can contribute to wine tourism development in wineries. The second objective is to analyze the effects of wine tourism development on wineries' organizational performance. The study is based on a conceptual model, estimated and validated through Structural Equation Modeling (SEM) and applied to the wineries of Portugal's Alentejo Wine Route that have incorporated tourism into their businesses. We aim to provide insights into the field of strategic management, through an analysis of an intra-organizational business model that will enable us to measure the drivers and effects of wineries' involvement in the development of wine tourism.

The dynamic capabilities approach is a theoretical framework for understanding organizational strategic change (Teece, Pisano, & Shuen, 1997). The main premise of this approach is that the company requires sensing, seizing, and reconfiguring capabilities to acquire competitive advantages. The literature on the concept of dynamic capabilities is recent. However, in a short space of time, theoretical and empirical developments in different areas and economic sectors have been presented (Ambrosini, Bowman, & Collier, 2009; Ambrosini & Bowman, 2009; Barreto, 2010; Eisenhardt & Martin, 2000; Helfat *et al.*, 2007; Teece, 2007, 2009; Teece *et al.*, 1997; Winter, 2003; Zahra, Sapienza, & Davidsson, 2006; Zollo & Winter, 2002). Some studies have focused on the service sectors, particularly tourism (Haugland, Ness, Grønseth, & Aarstad, 2011; Kim & Boo, 2010; Lemmetyinen & Go, 2009; Nieves & Haller, 2014). However, there are

no studies with this approach applied to the development of wine tourism (Lavandoski, Vargas-Sánchez, & Silva, 2014).

The paper is organized as follows: the next section reviews the literature on wine tourism and dynamic capabilities, and presents some studies that examine the development processes of dynamic capabilities and their effects on the service sector, particularly on tourism enterprises. Afterwards, it proposes the conceptual model and research hypotheses. The methodology presents the methods and data used in the study. Next, the main results of the analysis are discussed. The final section, besides providing conclusions and theoretical and practical implications, also reflects on some limitations and offers some recommendations for future research.

RESEARCH BACKGROUND

WINE TOURISM

The concept of wine tourism links the wine produced, with tourism activity. The European Paper on Wine Tourism, the master document that lays the foundations and principles of wine tourism in Europe, defines wine tourism as tourist and “spare time” activities, dedicated to the discovery and to the cultural and wine knowledge pleasure of the wine and local gastronomy. the set of all leisure and free time activities and tourist resources related to the material and immaterial cultures of the wine and local gastronomy.

In the different wine-producing countries, wine tourism development is based mainly on the creation and structuring of routes or official wines roads, managed by an entity, usually in the form of associations (Hall *et al.*, 2002). Alongside the wine routes, wineries also need to develop wine tourism in their business units, creating the infrastructure to receive visitors in their facilities, with visitation programs and activities involving wine (such as vineyard tours, wine tasting, grape harvesting activities, etc.).

Europe is a great issuing and receiving destination for wine tourists, and the flow of visitors to wineries is increasing significantly. In Portugal, wine tourism

activity is now widespread, due to the country's strong cultural tradition of wine growing, and the number of wine companies investing in wine tourism. Wine tourism is also a strategic product for the development of tourism in Portugal. Within the area of "gastronomy and wine", wine tourism is one of the ten pillars that support the country's tourism promotion, as established in the National Strategic Tourism Plan - PENT 2013-2015 (Turismo de Portugal, 2013). Portugal has eleven wine routes, situated in twelve wine producing regions (Instituto da Vinha e do Vinho, 2015). These routes began to be implemented from 1993, through the "Dyonisios" program of European Union.

DYNAMIC CAPABILITIES

This study draws from the dynamic capabilities approach to argue that wineries purposely create, extend, and modify their processes, building and using key dynamic capabilities to develop wine tourism as part of their business portfolios. In this organizational context, these dynamic capabilities enable changes in the strategic process toward wine tourism development, bringing positive effects on organizational performance.

The dynamic capabilities approach is an emerging approach to strategic management that focuses on the reconfiguration of resources and organizational capabilities. It first emerged when the resource-based view (RBV) proved inadequate to explain the sustainable competitive advantage of organizations in quickly changing environments (Teece, 2009; Teece & Pisano, 1994). A dynamic capability was initially defined as *"the firm's ability to integrate, build, and reconfigure internal and external competences to address rapidly changing environments"* (Teece, Pisano, & Shuen, 1997, p. 516). Since this seminal study, a large body of researchers has advanced, first with theoretical frameworks and later, with empirical studies in different areas of research. Next came Winter (2003) and Teece (2007), Pavlou and El Sawy (2011, p. 242), who understand dynamic capabilities *"as those capabilities that help units extend, modify, and reconfigure their existing operational capabilities into new ones that better match the changing environment,"* where *"operational capabilities"* are *"defined as the ability to execute day-to-day activities."*

Dynamic capabilities differ from other organizational abilities, according to their importance and the functions they provide within the organization (Barreto, 2010). They are located on a second hierarchical level (Winter, 2003). Dynamic capabilities have a transformational nature related to cycles of organizational change, and they purposefully create, extend, or modify the resource base of the firm, which is located on the first hierarchical level (Helfat *et al.*, 2007). There is a consensus that dynamic capabilities are a particular type of organizational capability that is unique and specific to an organization (Eisenhardt & Martin, 2000; Teece, 2009; Teece *et al.*, 1997). Thus, in a number of organizations, there are heterogeneous dynamic capabilities (Teece *et al.*, 1997; Zahra *et al.*, 2006). Dynamic capabilities cannot be bought; they must be built (Prahalad & Hamel, 1990; Teece *et al.*, 1997; Teece & Pisano, 1994) and are difficult to replicate or imitate (Teece, 2009; Teece & Pisano, 1994). Dynamic capabilities usually occur only incrementally (Teece & Pisano, 1994). Eisenhardt & Martin (2000) recognize the potential of dynamic capabilities as a tool to manipulate the configuration of resources, in pursuit of improved effectiveness.

A particular set of underlying processes explains how dynamic capabilities work. The original study of Teece *et al.* (1997) presents the microfoundations of dynamic capabilities: coordination/integration, learning, and reconfiguration. Subsequently, Teece (2007) refines these into three consecutive stages: (a) sensing, (b) seizing, and (c) managing threats and reconfiguration. The first stage refers to the identification and evaluation of opportunities in the environment. The second stage of the process involves mobilizing the necessary resources for the identified opportunities, while defining strategies and adding value through these operations. The third stage is the continuous renewal of resources and organizational routines needed to maintain the competitive advantage. Considering David Teece's arguments, solid and recent empirical studies have proposed a measurable model to represent the nature of dynamic capabilities (Pavlou & El Sawy, 2011, 2013; Protogerou, Caloghirou, & Lioukas, 2012). These studies establish that dynamic capabilities have an indirect and positive effect on performance, through a reconfiguration of operational capabilities. According to Protogerou *et al.* (2012), dynamic capabilities involve coordination, learning, and strategic competitive response. Differently, Pavlou and El Sawy (2011, 2013)

present four components of dynamic capabilities: sensing, learning, integration, and coordination capabilities.

Sensing capability is to the ability to spot, interpret, and pursue opportunities in the environment. Learning capability is the ability to revamp existing operational capabilities with new knowledge. Integrating capability is the ability to combine individual knowledge into the unit's new operational capabilities. Finally, coordinating capability refers to the orchestration and deployment of tasks, resources, and activities within the new operational capabilities. These four dynamic capabilities interact in sequential logic to reconfigure existing operational capabilities (Pavlou & El Sawy, 2011, 2013).

Teece (2009) recognizes that dynamic capabilities and innovations are connected. This relationship can be seen by the following argument: *"dynamic capabilities of course require the creation, integration, and commercialization of a continuous stream of innovation consistent with customer needs and technological opportunities"* (Teece, 2009, p. 52). In relation to restructuring and diversification of farm businesses, a study by Grande (2011) reveals that without the ability to sense and seize opportunities, farm businesses would probably be neither dynamic nor adaptive. Several studies applying the dynamic capabilities approach to the service sector have analyzed the relationship between dynamic capabilities and innovation (Ellonen, Wikström, & Jantunen, 2009; Gebauer, 2011; Hertog, Aa, & Jong, 2010; Kindström, Kowalkowski, & Sandberg, 2013; Salunke, Weerawardena, & McColl-Kennedy, 2011).

In the service sector, through the identification of key microfoundations instituted by Teece (2007), researchers investigate how dynamic capabilities shape the way service business develops in a broad range of manufacturing companies. The main challenges facing companies seeking to change their business models to incorporate services are how to manage and expand the dynamic capabilities of sensing, seizing, and reconfiguring, which facilitate a focus on service business and are essential to successful service innovation (Fischer, Gebauer, Gregory, Ren, & Fleisch, 2010; Gebauer, 2011; Kindström *et al.*, 2013). Salunke *et al.* (2011) suggest that service companies with entrepreneurial behavior (with proactivity and innovation, for example) seek innovation, carefully selecting and using the dynamic capabilities that allow them to achieve greater

innovation and competitive advantages. Thus, the dynamic capabilities enable companies to create new knowledge-based resource combinations, leading to service innovation.

The literature on the development of new services, and service innovation, show that service development processes are different from product development processes (Salunke *et al.*, 2011). The complex features of services (i.e. intangibility, inseparability, variability, perishability, and heterogeneity) should be considered, and this, in turn, reflects the unique conditions of the service industry. It can be seen in the wineries' involvement with wine tourism (the object of this analysis). The development of wine tourism can be seen as an innovative process for these companies when they are guided into tourism services.

As identified by Lavandoski *et al.* (2014), the application of the dynamic capabilities approach in the tourism sector is recent and growing. These tourism studies provide insights into dynamic capabilities development processes in hotels (Nieves & Haller, 2014), meeting planners (Kim & Boo, 2010), and coordinators' perceptions (Lemmetyinen & Go, 2009) as well as many other studies of tourist destinations from which the concept of destination capabilities emerges (Haugland *et al.*, 2011). Nieves and Haller (2014) found that a high level of human capital (level of employees' knowledge, skills, and abilities) encourages the development of the dynamic capabilities of sensing, learning, integrating, and coordinating in Spanish and Portugal hotels. In the context of meeting planners, knowledge management and the ability to reconfigure and integrate the existing resources in new ways (i.e. *resource reconfigurability*) are two key abilities, which directly impact the job performance of meeting planners (Kim & Boo, 2010). Additionally, Lemmetyinen and Go (2009) identify three key capabilities required for managing tourism business networks: partnering capability, the ability to create knowledge, and absorptive capability.

CONCEPTUAL MODEL AND RESEARCH HYPOTHESES

This literature review attempts to demonstrate that organizational processes are becoming an acceptable and promising way to analyze dynamic capabilities. The previous studies mentioned above show how organizations change their

internal processes through dynamic capabilities. These processes include methods for new product development, problem-solving processes, knowledge-sharing processes, marketing knowledge development, etc. (Easterby-Smith, Lyles, & Peteraf, 2009; Teece, 2007, 2009). In this analysis, the first objective of this study is to understand the extent to which levels of dynamic capabilities can contribute to wine tourism development in wineries. This article argues that wineries purposely create, extend, and modify their processes, building and using key dynamic capabilities towards wine tourism development. This leads us to the following hypothesis:

H1: There is a direct and positive relationship between dynamic capabilities and wine tourism development in an organizational context.

Using the components of sensing, learning, integrating, and coordinating capabilities to measure dynamic capabilities (Pavlou & El Sawy, 2011, 2013), researchers can connect empirical research results to the dynamic capabilities literature in a rigorous way (Barrales-Molina, Martínez-López, & Gázquez-Abad, 2014). Based on this argument, the following hypotheses are proposed:

H1a: The ability to spot, interpret, and pursue opportunities in the environment (sensing capability, SC), by contributing to dynamic capabilities, positively influences wine tourism development.

H1b: The ability to revamp existing operational capabilities with new knowledge (learning capability, LC), by contributing to dynamic capabilities, positively influences wine tourism development.

H1c: The ability to embed new knowledge in the new operational capabilities by creating a shared understanding and collective sense-making (integrating capability, IC), by contributing to dynamic capabilities, positively influences wine tourism development.

H1d: The ability to coordinate and deploy tasks, resources, and activities within the new operational capabilities (coordinating capability, CC), by contributing to dynamic capabilities, positively influences wine tourism development.

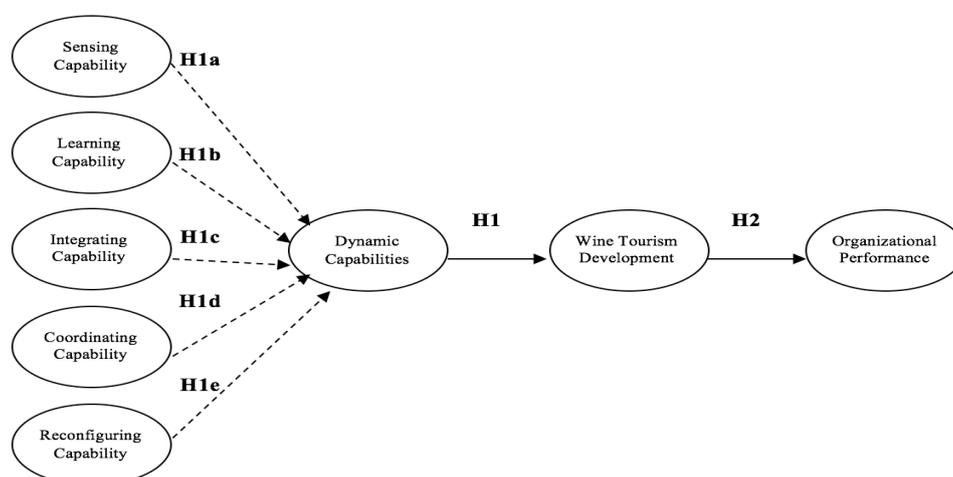
H1e: The ability to reconfigure existing operational capabilities into new ones (reconfiguring capability, RC), by contributing to dynamic capabilities, positively influences wine tourism development.

The use of dynamic capabilities enables organizations to implement strategic measures to prevent negative impacts on the organization. Eisenhardt and Martin (2000) argue that the value of dynamic capabilities for competitive advantage lies in their ability to alter the base of resources. In general, studies assume a potential positive influence of dynamic capabilities on organizational performance (Desai, Sahu, & Sinha, 2007; García-Morales, Jiménez-Barrionuevo, & Gutiérrez-Gutiérrez, 2012; Grande, 2011; Hsu & Wang, 2012; Hung, Chung, & Lien, 2007; Hung, Yang, Lien, McLean, & Kuo, 2010; Kim & Boo, 2010; Leonidou, Leonidou, Fotiadis, & Zeriti, 2013; Pavlou & El Sawy, 2011, 2013; Protogerou *et al.*, 2012; Sainaghi & De Carlo, 2012; Wilden, Gudergan, Nielsen, & Lings, 2013; Yalcinkaya, Calantone, & Griffith, 2007). In this study, we analyze the effect of wine tourism development on wineries' organizational performance. Hence, our study proposes one final hypothesis stating that:

H2: *Wine tourism development directly and positively influences the organizational performance of wineries.*

Thus, based on the previous literature, Figure 1 presents the analysis model, which indirectly connects the five capabilities (SC, LS, IC, CC, and RC), through dynamic capabilities (DC), with wine tourism development (WTD), **and their effects on organizational performance (OP)**. This model comprises a total of 103 indicators (or observable variables) and eight latent variables. The hypotheses are represented as corresponding paths. The dashed lines represent indirect relationships between the constructs.

Figure 1: Proposed research model



Source: Own elaboration.

The survey was conducted in Alentejo, one of the main wine tourism regions of the country, situated in the south of Portugal. This region was chosen due to the diversity of wine tourism supply and the characteristics of companies with wine tourism units in their business. The Alentejo region has more than 21 thousand hectares of vineyards, and is the largest producer of wine by volume with Protected Geographical Indication (PGI) in the country (Instituto da Vinha e do Vinho, 2015). The Alentejo Wine Route comprises 263 wine producers and 97 retailers, with companies ranging in size from small to large, which are prominent on the national scene in terms of production of wine and large agricultural estates with vineyards.

A quantitative study was developed using a questionnaire applied in wineries with wine tourism. The respondents and key informants were directors or managers of wine tourism businesses. The questionnaire was reviewed by experts, and subsequently, a pre-test of the questionnaire with 6 enterprises was conducted during the month of March 2014 in another area of Portuguese wine tourism, the Setubal region. Once the pretrial questionnaire had been reviewed and agreed upon, the final draft was drawn up. The questionnaire, with 5-point, *Likert* scale-type questions, examines the manager's perceptions of the dynamic capabilities (DC), the wine tourism development (WTD), and the organizational performance (OP), as follows:

The dynamic capabilities (DC) capture (1) the generation, dissemination, and responsiveness to market opportunities through sensing capability (SC) with four items; (2) the acquisition, assimilation, transformation, and exploitation of knowledge through learning capability (LC) with five items; (3) the contribution, representation, and interrelation of individual input to the company as a whole through integrating capability (IC) with five items; (4) the resource allocation, task assignment, and synchronization through coordinating capability (CC) with five items; and (5) the potential for reconfiguration through reconfiguring capability (RC) with two items. All these items were adapted from the scale proposed by Pavlou and El Sawy (2011, 2013), which was contextually validated for the electronics industry (Chen & Chang, 2012) and the hotel industry (Nieves & Haller, 2014).

Wine tourism development (WTD) is evaluated by a set of attributes that compose the wine tourism product and are relevant to studies on the demand side, which shows the evaluation of tourists' wine tourism experience (Alant & Bruwer, 2004; Alonso, 2005; Bruwer & Lesschaeve, 2012; Bruwer, 2003; Carlsen & Charters, 2006; Cohen & Ben-Nun, 2009; Dowling & Carlsen, 1998; Getz & Brown, 2006; Hall *et al.*, 2002; McDonnell & Hall, 2008; Sparks, 2007; Stavrinoudis *et al.*, 2012; Tassiopoulos, Nuntsu, & Haydam, 2004; Zhang & Qiu, 2011). A total of 45 items involve physical aspects of the interior and exterior of the winery, human resources, marketing, customer service, and wine tourism activities offered at the wineries.

Organizational performance (OP) measures the impact of the development of wine tourism on the organization through six items adapted from Hung *et al.* (2007) and which was validated by Hung *et al.* (2010).

The questionnaire was available online for ten weeks between the months of May to August 2014. The sample for the study was drawn from a list of 62 wineries along the Alentejo Wine Route having a component of wine tourism. This means that these surveyed wineries are, at least, producing wine and have a visitor reception for wine tours and tastings. The target population was invited to voluntarily participate in the survey by telephone and email. From the returned questionnaires, a total of 40 responses were fully completed, representing a high response rate (64,5%) in relation to other studies on wine tourism development (Alonso & Liu, 2012; Iglesias & Navarro, 2014; Stavrinoudis *et al.*, 2012).

DATA AND ANALYSIS METHOD

The profile of the companies in the sample (n = 40) consists of small to large wineries. The wine production ranges from 5 mil liters to more than 5 million liters per year, and 75% of the sample produces 1 million liters per year or less. Most companies (65%) have up to 15 employees, of which up to 3 employees are involved with wine tourism activities; a minority of company's employees have wine tourism qualifications.

This research used the SPSS (v.22) statistical package to describe the data, and the SmartPLS (v.3.1.5) software (Ringle, Wende, & Becker, 2014) to estimate Structural Equation Modeling (SEM). The use of SEM methodology in tourism research is growing (Nunkoo & Ramkissoon, 2011; Pinto, 2016; Valle & Assaker, 2015). Considering the small sample size and the complexity of the model, the Partial Least Square Path Modeling (PLS-PM) approach was considered adequate to estimate and validate the model (Chin, 2010; Henseler, Ringle, & Sinkovics, 2009; Valle & Assaker, 2015). As regards, the minimum requirements for sample size, the “ten times rule” should be considered for the application of the PLS approach (Barclay, Higgins & Thompson, 1995). According to this rule of thumb, the sample size should exceed the most complex relationship in the model, that is: a) ten times the number of indicators of the latent variable with the largest number of formative indicators; or b) ten times the maximum number of paths directed at a latent variable in the structural model (Pinto, 2016). In this analysis model, despite our sample size of only 40 observations, it represents around two-thirds of the target population. Moreover, the “ten times rule” is fulfilled in our model.

Figure 1 shows the model, following Pavlou and El Sawy's (2011, 2013) approach, which proposes that dynamic capabilities (DC) is a second-order construct with formative relationships to sensing capability (SC), learning capability (LC), integrating capability (IC), coordinating capability (CC) and reconfiguring capability (RC). The original Pavlou and El Sawy (2011, 2013) model posits reconfiguration is an internal measure of the dynamic capabilities construct, but in the analysis model adopted in this study, this reconfiguration capability has been considered a fifth capability, as seen in David Teece arguments and recognized in other studies (Fischer *et al.*, 2010; Gebauer, 2011; Kindström *et al.*, 2013).

Due to the formative relationship of the DC construct with the five capabilities, the model can be classified as a “molar second-order construct” (Chin, 2010) or as a “reflective-formative model” (Becker, Klein, & Wetzels, 2012), in the sense that there is a general concept (which is DC in the model present in Figure 1) that fully mediates the influence of reflective first-order constructs (i.e., SC, LC,

IC, CC, and RC) in subsequent endogenous variables, wine tourism development (WTD). This approach therefore enables us to derive the indirect effect to five reflective first-order constructs (SC, LC, IC, CC, and RC) on WTD as the pairwise product of weights for the formative construct (DC) and the path coefficient linking DC and WTD. Besides these constructs, our model also proposes that WTD and organizational performance (OP) are reflective first-order constructs.

Studies presented by Becker *et al.* (2012) show that the repeated indicator approach should be used for reflective-formative models and *“this approach produces generally less biased, and, therefore, more precise parameter estimates and a more reliable higher-order construct score”* (Becker *et al.*, 2012, p. 376). In the approach used in our study, the second order construct is measured by using the same set of items used to measure each first-order construct (Becker *et al.*, 2012; Chin, Marcolin, & Newsted, 2003; Chin, 2010). Additionally, empirical studies with dynamic capabilities also provide justification for the acceptance of the second-order model (Protogerou *et al.*, 2012; Wilden *et al.*, 2013).

After estimating the model, we validated it by observing the most important results for two components: the measurement model (reflective and formative) and the structural model (Hair, Ringle, & Sarstedt, 2013; Henseler *et al.*, 2009). Finally, we tested the research hypotheses by observing the signal and the statistical significance of the direct and indirect relationships between the latent constructs.

RESULTS

MEASUREMENT MODEL

Overall, the model was estimated with a sample size of 40, eight latent variables and 103 indicators in total. Table 1 shows the main results for the reflective measurement models, where 55 indicators remained. The results of the reflective measurement model suggest that the constructs used in this study have satisfactory levels of internal consistency (i.e. reliability) and validity (convergent and discriminant). All items load moderately to highly on the corresponding latent constructs (loadings exceed 0.592), suggesting at least moderate individual reliability. The significance

of the loadings is also reported in Table 1 (for all, $p < 0.01$). Note that the model was initially estimated with many items, especially in the case of the WTD construct. However, to meet all the minimum requirements of the measurement model in terms of reliability and validity, they needed to be eliminated. This was an expected result, given the exploratory nature of this study.

Table 1: Reflective measurement models

Constructs	Indicators	Second-order loadings	First-order loadings	p-values
Sensing Capability (SC)	Analyze the market	0.823	0.888	0.000
	Review effects of changes on customers	0.695	0.846	
	Product development efforts	0.803	0.911	
	Implement ideas	0.782	0.877	
Learning Capability (LC)	Identify new information	0.828	0.890	0.000
	Assimilate new information	0.799	0.905	
	Transform information into new knowledge	0.771	0.928	
	Use new knowledge	0.744	0.923	
Integrating Capability (IC)	Develop new knowledge	0.791	0.922	0.000
	Individual contribution to the group	0.593	0.748	
	Global understanding of each other's tasks	0.800	0.913	
	Knowledge and skills to function	0.799	0.898	
Coordinating Capability (CC)	Interaction between departments	0.605	0.738	0.000
	Interconnect activities between departments	0.777	0.912	
	Synchronize the work	0.761	0.831	
	Allocation of resources	0.693	0.839	
Reconfiguring Capability (RC)	Assign tasks	0.645	0.732	0.000
	Compatibility between knowledge	0.658	0.902	
	Team coordination	0.642	0.795	
Wine Tourism Development (WTD)	Reconfigure resources	0.765	0.929	0.000
	Recombine resources	0.794	0.935	
	Regional resources	-	0.666	
	Professional qualification in tourism	-	0.772	
Organizational Performance (OP)	Language customer service	-	0.688	0.000
	Familiarity with processes	-	0.707	
	Restaurant	-	0.686	
	Artistic activities	-	0.765	
Organizational Performance (OP)	Thematic activities	-	0.685	0.000
	Competitive advantage	-	0.851	
	Market share	-	0.861	
	Profits	-	0.892	
Organizational Performance (OP)	Costs	-	0.627	0.000
	Sales	-	0.821	
	Customer satisfaction	-	0.726	

Source: Own elaboration.

Table 2 presents the values of average extraction variance (AVE), construct reliability (CR), and R^2 and the Q^2 values for the endogenous latent variables. For CR, the values in our model surpass the minimum recommended threshold of 0.7 (Fornell & Larcker, 1981). Moreover, all constructs reveal an AVE higher than 0.5, suggesting an adequate convergent validity (Bagozzi & Yi, 1988). Particularly, this means that a latent variable can explain more than half of the variance of its indicators on average. In assessing discriminant validity, the Fornell and Larcker (1981) criterion and the cross-loadings were observed (values not presented in the tables). Regarding the former, we observed that the square root values of the AVE's of each construct were higher than the correlation coefficient values of each construct relative to other constructs. Concerning the cross-loadings, each indicator loads higher on the corresponding construct than on the other. Finally, the R^2 values measuring the explained variability in the structural equations for SC, LC, IC, CC, WTD, and OP are moderate. And the Q^2 values are all positive, meaning that the corresponding structural equations have predictive relevance.

Table 2: Evaluation of measurement models

	AVE	CR	R^2	Q^2
Dynamic Capabilities (DC)*	0.555	0.963	1.000	0.538
Sensing Capability (SC)	0.776	0.933	-	-
Learning Capability (LC)	0.835	0.962	-	-
Integrating Capability (IC)	0.715	0.926	-	-
Coordinating Capability (CC)	0.675	0.912	-	-
Reconfiguring Capability (RC)	0.869	0.930	-	-
Wine Tourism Development (WTD)	0.506	0.877	0.529	0.224
Organizational Performance (OP)	0.643	0.914	0.394	0.222

* second-order construct

Source: Own elaboration.

Lastly, in assessing the dynamic capabilities (DC) of the second-order formative construct, we observe that the five weights are statistically significant, meaning that sensing capability (SC) (weight = 0.256; $p = 0.000$), learning capability (LC) (weight = 0.295; $p = 0.000$), integrating capability (IC) (weight = 0.263; $p = 0.000$), coordinating capability (CC) (weight = 0.233; $p = 0.000$) and reconfiguring capability (RC) (weight = 0.121; $p = 0.000$) significantly contribute to form the DC construct. Moreover, the variance inflation factor (VIF) of the values in the five situations are

all very low, clearly lower than 5, showing absence of serious multicollinearity in a set of indicators linked to a formative construct (i.e. DC, in this analysis model).

STRUCTURAL MODEL

The path coefficient estimates are shown in Table 3. These are the direct estimated coefficients for the direct relationships that concern H1 (a, b, c, d, and e) and H2. These results and the corresponding p -values are outputs of the *SmartPLS* software. All sets of hypotheses are not rejected ($p < 0.05$).

Table 3: Direct and indirect effects and research hypotheses outcomes

Hypothesis	Constructs relations	Coefficients β	p-value (bootstrap)	Verification of hypothesis
H1	DC > WTD	0.727	0.000	Not rejected
H1a	SC > WTD*	0.186	0.000	Not rejected
H1b	LC > WTD*	0.214	0.000	Not rejected
H1c	IC > WTD*	0.191	0.000	Not rejected
H1d	CC > WTD*	0.170	0.000	Not rejected
H1e	RC > WTD*	0.088	0.000	Not rejected
H2	WTD > OP	0.628	0.000	Not rejected

* indirect effects

Source: Own elaboration.

Total effects of the exogenous latent variables on WTD and OP are represented in Table 4. As can be seen, learning capability (LC) is the strongest predictor of wine tourism development (total effect = 0.214) and organizational performance (OP), (total effect = 0.120). All total effects are statistically significant.

Table 4: Analysis of total effects of the independent variables on wine tourism development

		Total effects	
		β	p -value (bootstrap)
SC	WTD	0.186	0.000
LC	WTD	0.214	0.000
IC	WTD	0.191	0.000
CC	WTD	0.170	0.000
RC	WTD	0.088	0.000
SC	OP	0.117	0.000
LC	OP	0.134	0.000
IC	OP	0.120	0.000
CC	OP	0.106	0.000
RC	OP	0.055	0.000

Source: Own elaboration.

The analyses of indirect effects enable identification of the capabilities that have the greatest incidence of wine tourism development in the wineries of the Alentejo. The learning, integrating and sensing capabilities are the strongest, followed by coordinating and reconfiguring capabilities (Table 3 and 4).

Learning capability is the ability to revamp existing operational capabilities utilizing new knowledge (Pavlou & El Sawy, 2011, 2013). For wine tourism development, it is necessary for wineries to create new spaces on the agricultural property to receive visitors in the cellars and offers wine-related tourist activities. This expansion of the business model involves an internal learning process, through specific organizational routines, such as (a) acquiring new information and knowledge, (b) assimilating this new information and knowledge, (c) transforming existing information into new knowledge about wine tourism, (d) utilizing knowledge to offer new activities and service that enhance wine tourism, and (e) developing new knowledge that has the potential to influence the development of wine tourism activities in the company's business unit.

Integrating capability is related to the collective logic and shared interaction patterns (Pavlou & El Sawy, 2011, 2013). In the context of wineries, wine tourism activities should contribute to knowledge and information of other departments, such as wine production and sales and marketing.

Sensing capability is the organizational capacity to scan the environment for identifying markets opportunities and customer needs (Teece *et al.*, 1997). Wine tourism fits into a new market opportunity for wineries and meets current customer desires to know and learn about wines, and enjoy rural environments and local gastronomy.

Coordinating capability requires wine tourism synchronization with other activities and departments, so that the visitors and wine tourism activities do not adversely interfere in the daily agricultural activities of wine production. Finally, reconfiguring capability involves routines to successfully reconfigure resources to come up with new productive assets. These firms should often engage in resource recombination by the implementation of new management methods regarding wine tourism and procedures for human resources allocation that better correspond to the needs of visitors and the organizational assets.

The theoretical framework of dynamic capabilities identifies that these wineries build and use dynamic capabilities that enable them to reconfigure resources and capabilities to develop wine tourism. Thus, the direct and positive relationship of dynamic capabilities with WTD is supported (H1).

This study can identify that a set of capabilities—sensing, learning, coordinating, integrating and reconfiguring—contributes simultaneously and differentially for WTD (supporting H1a, b, c, d, e). This result is consistent with the literature (Fischer *et al.*, 2010; Gebauer, 2011; Kindström *et al.*, 2013; Pavlou & El Sawy, 2011, 2013).

Regarding the second objective, the results proved that WTD promotes better performance for wineries (H2) in terms of competitive advantages, market share, profits, sales, and customer satisfaction, while some costs with products and services may be reduced (Table 1). Similar results have been identified in small New Zealand wineries (Beverland & Lockshin, 2001).

In summary, based on this identified and defined intra-organizational perspective, this study reveals how wineries change their internal processes using dynamic capabilities that allow them to engage with the tourism industry through wine tourism. This results clearly show that wineries can renew and extend their operational capabilities.

IMPLICATIONS, RECOMMENDATIONS AND LIMITATIONS

The contribution of this study relates mainly to three aspects: application of dynamic capabilities, structural equation modeling (SEM) methodology and the wineries' perspective of WTD. This research therefore contributes to knowledge by testing this theory and providing a series of valid and tested indicators, stimulating further research. Specifically, this work fills a research gap by undertaking an empirical investigation on wine tourism by applying the dynamic capabilities approach. There have been many theoretical studies on dynamic capacities, but there is still room for quantitative studies. This is one

of the innovative aspects of this study. The other is the application of the SEM methodology from the supply perspective, as studies on tourism attitudes and tourism behavior generally use the demand perspective.

The research incorporates five capabilities that drive the wineries' innovation process and lead them to branch into wine tourism, showing that wineries renew and extend their operational capabilities. In this sense, they need to ensure that opportunities, once sensed, can be learned and synchronized by the company as a whole, and they ought to consider how the business can be reconfigured (with the addition of wine tourism), particularly when the ecosystem in which the enterprise is inserted is unstable and highly competitive.

This study presents a series of practical implications for the business reality of the wine and tourism industries regarding the wine tourism components and their management. From a managerial point of view, this paper provides guidance concerning the relevance of investing in dynamic capabilities, and how they can be leveraged. Organizations in highly competitive environments (like tourism) should be guided by managers that require entrepreneurial and innovative skills. Thus, it is essential to create and implement dynamic capabilities, in order to sense, learn, integrate, coordinate and reconfigure capabilities. Dynamic capabilities also facilitate the winery's focus on expanding the business model by engaging in activities linked to tourism services through wine tourism. In general, these findings can assist managerial decision-making processes in the search for organizational success and competitive advantages.

The main limitation of this study is that the results cannot be generalized, given that it focuses on a specific sample, in specific territory. Future works can resolve this by replicating the research in other wine tourism regions.

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