

SUSTAINABLE AND INNOVATIVE WINE TOURISM

Success models from all around the world

Raúl Compés López
Gergely Szolnoki
Editors

42

MONOGRAFÍAS



Sustainable and innovative wine tourism. Success models from all around the world

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Raúl Compés López | Universitat Politècnica de València

Gergely Szolnoki | Hochschule Geisenheim University

EDITING and PUBLISHING

Cajamar Caja Rural

www.publicacionescajamar.es | publicaciones@cajamar.com

LAYOUT

Beatriz Martínez Belmonte | Cajamar Caja Rural

TRANSLATIONS

Andrew Mortimer

Paola Compés Tatay (collaborator)

ISBN-13: 978-84-95531-55-1

Legal Deposit: AL 160-2021

Print: Gráficas Piquer

Release Date: January 2021

Printed in Spain

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Raúl Compés López

Universitat Politècnica de València

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Hochschule Geisenheim University



M o n o g r a f í a s



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Foreword of the Publisher

Roberto García Torrente

Agrifood Innovation - Grupo Cooperativo Cajamar

As part of the support that Cajamar Caja Rural provides to the agri-food business, the wine sector has received special attention in recent years. It is an activity to be found in practically every part of the Spanish State and its impact, not only in terms of land use, with more than 900,000 hectares dedicated to vine growing, but socially and economically as well, with 110,000 agricultural holdings and over 4,300 wineries, is considerable.

Given the importance of the world of wine in Spain, we have a substantial group of specialists, professional whose tasks range from caring for the vines, through oenology to marketing, and business management. The sector has also learnt how to arouse the interest of the academic world, with a relevant number of researchers and professors dedicating part of their work to supporting the sector's development.

As a result of this great human capital, the Spanish wine sector can be considered to be in a state of permanent transformation, seeking formulas to increase the value and wealth that it generates in the different territories where it is present.

In our field of action, we have endeavoured to accompany this evolutionary process in different ways. As a financial institution specialized in the agri-food sector, we have made the economic necessary resources available to finance the investments made in the vineyards, in the wineries, in product innovation and in the opening of new international markets.

However, due to the agronomic experimentation projects we carry out and our studies and publications service, our support has always been significantly knowledge- and outreach-based.

Regarding the latter, we have maintained a close and very fruitful relationship with Professor Raúl Compés López, which has led to the publication of several monographs. The first was released in 2014 and was designed to analyse the economic role of wine in Spain, and a comparison with the main producing countries. The second was published in 2019 and analysed the possible impact of climate change on the wine sector and how wineries can act to mitigate and adapt to it. The quality of these two works was recognized by the International Wine Organization which were conceded the respective annual awards for the sector's best works.



Furthering this relationship, we have shared many ideas and concerns about how to help the Spanish sector excel for something more than 'just' having the largest vineyard area and being one of the main producers and exporters of wine. We believe that there is still a long way to go to improve the value it produces.

To achieve this, it will be necessary to act in different ways and at different levels. To begin with, we considered it a good idea to make it known to domestic consumers and those who visit us from abroad alike. And, since Spain is one of the great tourist powers, it was essential to combine the world of wine with that of tourism.

The wine sector has always had connotations that have exceeded the merely agronomic and industrial issues related to vine development and wine production. Given that it is an agri-food activity that has been carried out for millennia, over the years it has given rise to an environmental, cultural and architectural heritage that has endured through time. Many of the landscapes and buildings related to wine production were created centuries ago and have been conserved, and improved, as a clear example of this sector's commitment to sustainability.

On the other hand, the consumption of wine has been linked on many occasions with leisure activities and celebrations, therefore society in general has a positive view of winemaking.

Paradoxically, the natural relationship that could have arisen between wine and tourism has taken much longer to develop in the older producing countries, such as France, Italy and Spain, than in the so-called "new world" countries which were the pioneers. It is quite probable that, until relatively recently, the high levels of consumption per capita of the "old world" countries made them more conservative in developing new lines of business for wineries. On the contrary, the countries that did not have a great wine-drinking tradition had to generate new initiatives to publicize their wines and promote their consumption among the population, initially domestic and progressively more internationalized.

The results obtained in all cases are positive and the impact it is having on the sector's turnover is extremely interesting. For many wineries it accounts directly for a high and growing percentage of wine sales. Even with the possibilities offered to us by digitization nowadays, sales are not merely limited to the visit itself but, thanks to e-commerce, can last much longer. In any case, a positive experience following a visit to a winery strengthens the image of its wines and will promote purchases even through traditional sales channels.

It should also be noted that a project to support and promote wine tourism is not only aimed at enhancing the value of a winery and increasing its sales. It is necessary to have an entire infrastructure that caters for the visitors' various needs, ranging from the accommodation and restaurants to the possibility of carrying out complementary activities related to other attractions in the region.

To the same extent, the economic impact of wine tourism is distributed amongst a significant number of social and economic players.



The general aspects to be considered for an immersion in wine tourism to be successfully addressed will become clear throughout the 25 chapters of this monograph. Most of it is dedicated to analysing the main initiatives that have been carried out in different countries. The reader will be able to discover experiences from which to learn, to apply both in the field of individual companies and the collective actions necessary to create the infrastructures to support wine tourism in a certain district.

During the preparatory stages of this monograph, we suffered a pandemic with extremely negative consequences for both health and the economy. We have the feeling that our lives are being subjected to a hiatus, in which our behaviour has had to change in many ways. Some of those changes are here to stay, such as the accelerated digitization of many of our activities. But others will be restored, and we will once again be able to enjoy activities such as sharing a moment of leisure with our families and friends and in which wine will be present.

And, upon our return to normality, probably more than ever before, we will appreciate and enjoy those real experiences that enable us to get to know how people do things. In this respect, wine tourism will once again be in great demand and this will be an opportunity for many Spanish wine regions.

I would like to end this presentation by expressing our most sincere gratitude and appreciation to the two editors of the work, professors Raúl Compés, from the Polytechnic University of Valencia, and Gergely Szolnoki, from the Hochschule Geisenheim University, for their magnificent and complicated work of designing and integrating such a significant and varied cast of authors. This is, without a doubt, the most international of all our works published to date, with the participation of 36 authors from 15 countries. This has encouraged us to publish two editions, one in Spanish and the other in English. I also want to dedicate a few heartfelt words of gratitude to all the authors for sharing their knowledge, accumulated over many long years of hard work, with us.





Foreword of the Editors

Raúl Compés López

Universitat Politècnica de València (Spain)

Gergely Szolnoki

Geisenheim University (Germany)

Legend has it that wine tourism was born when a visitor asked the owner of a winery to show him the cellar. The owner was quite surprised, as he had never thought that visiting his winery would be of interest to anyone. The moment he opened his doors to the visitor, marked the advent of a brand new, highly successful, branch of tourism.

Whether or not the story is accurate, and despite the evolution of wine tourism over the years, visiting a winery and tasting its wines is still at the core of enotourism. Visiting a winery, which could be described as pilgrimage for wine enthusiasts, is, in fact, the most crucial component of wine tourism. Wineries dedicated to tourism are opening the doors to their cellars. It is a magical step, connecting consumers to producers.

Opening the doors of a winery to travellers and curious people is a holistic experience. It combines cognitive, hedonistic, emotional and social elements. Wine tourists want to learn, to enjoy themselves, and to interact with others on this journey of discovery. Additionally, it is also a multidimensional experience, given the fact that the visit is enhanced not only by its physical characteristics but also by the historical and cultural environment in which the winery is integrated.

Because of its above-mentioned multifaceted nature, wine tourism has undergone an extraordinary evolution in just two decades. Wine tourism today includes a wide range of activities to accommodate different visitor profiles.

To better understand the structure and complexity of wine tourism activities, we can divide wineries into three categories: 1) those that do not formally offer any activities related to wine tourism, 2) 'traditional' wineries that have gradually adapted their facilities to meet touristic demands, and 3) the 'new' wineries that have been specifically designed to offer, directly or indirectly, a large number of touristic services (from visits and organized tastings to wine museums, stores, restaurants and so on). Some wineries in the latter category also host a wide range of events, including concerts, parties and company outings.

Depending on the services offered by a winery, there are several different models of touristic accommodation. Some wineries offer only 'basic', informal visits, including an introduction to their



premises and the possibility to buy wine *in situ* (the ‘basic’ model). Others offer formalised and professionalised schedules, reservations and guided tours and charge a price for the experience (the ‘intermediate’ model). Finally, the third model, known as the ‘total’ model, offers other highly customized services in addition to those mentioned above. An organic evolutionary process has been observed, with some wineries slowly upscaling their offerings from ‘basic’ to ‘total’.

The fundamental attractiveness of wine tourism is its natural fusion of two exciting worlds: wine and tourism. At an institutional level, the agreement signed in January 2020 in Madrid between the International Organisation of Vine and Wine (OIV) and the World Tourism Organisation (UNWTO) is a good illustration of how these two worlds are collaborating increasingly with one another. Wine tourism is following closely in the steps of the prestigious and consolidated models of gastronomic and cultural tourism.

Our book starts from the basics and opens new paths of enotourism, in particular with regard to the drivers of wine tourism evolution and of sustainability and innovation, as well as exploring the impact of the COVID-19 crisis and its consequences. Our methodological goal with this book is to make existing knowledge available to a broad audience and at the same time to develop new ideas that serve to improve and promote new research worldwide.



This book was born from a love for and interest in what wine tourism means as an intellectual, emotional and hedonic experience. The aim is to provide wineries and wine tourism with new references and ideas to improve their performance. Unlike other excellent works, our main interest is in identifying and analysing aspects related to sustainability and innovation at both the local and global levels. The choice of the thematic purposely responds to the approval of the United Nations Sustainable Development Agenda 2030, which had tourism in all its forms at its core (UNWTO and UNDP, 2018), and our view of innovation as the most important engine of differentiation, competitiveness and growth (Ratten *et al.*, 2019).

This does not pretend to be an academic manual providing explicit answers to classical or modern questions and problems raised by wine tourism. Instead, it aims to engage readers by expanding their knowledge on the topic and stimulating new ideas. For that reason, 25 chapters of content drawn from a wide range of voices in academia, journalism, consulting, and industry management have been integrated into this book.

Methodologically, the numerous chapters analyse wine tourism from several approaches, which can be grouped into two dimensions. First, the book undertakes an analysis of horizontal and transversal challenges, which are mostly seen at the national or company level, with a particular focus on Spain. Second, the book provides an analysis of relevant territories and denominations worldwide, subdivided into New World and Old World, responding not only to geographical disparities but also to the special contribution of the New World to the wine tourism industry. For each selected country, the chapter presents data on wine tourism, drivers for development and case studies.





This book is divided into four parts. The first part deals with general aspects of wine tourism, such as management (Chapter 1), good practices for wine tourism services (Chapter 2), the use of wine tourism to promote responsible wine consumption (Chapter 3), the growing importance of wine landscapes and museums (Chapter 4), the relationship of wine tourism with anthropology and the role of the great wine festivals (Chapter 5), as well as training and knowledge-transfer needs (Chapter 6).

The second part evaluates the horizontal dimensions of wine tourism in Spain. It contains chapters analysing digital wine tourism in Spain (Chapter 7), the operation of the wine-route model (Chapter 8), the new architecture of wineries (Chapter 9), the role played by cinema and literature in the development of wine tourism in the historical region of Jerez (Chapter 10), and the role played by territorial icons in emblematic regions, such as La Rioja (Chapter 11).

The third part analyses the situation of wine tourism in some of the most important European countries (also known as the 'old world'), such as France (Chapter 12), Italy (Chapter 13), Germany (Chapter 14), Hungary (Chapter 15) and Portugal (Chapter 16).

The fourth and final part dissects the situation of wine tourism in the rest of the world, particularly in the large producing and exporting countries known as the 'New World' and some countries with less weight in the worldwide industry. These include Argentina (Chapter 17), Australia (18), Brazil (19), Chile (20), China (21), Japan (22), Mexico (23), New Zealand (24) and the United States (25).



These four main areas of focus lead to important observations about sustainability and innovation. Since wine tourism serves as a showcase for the production processes and various other activities of the wineries, providers are, in turn, encouraged to continuously improve their core processes to meet sustainability expectations.

Some initial steps taken by wineries include the re-imagination of their viticulture practices for a more respectful relationship with the environment; this usually leads to the production of organic wines. Subsequently, these wineries often expand their range of activities to align with sustainability goals, especially in the environmental field, such as the mitigation of climate change and the promotion of energy efficiency.

Two trends coexist: the individual destination model, in which the winery is the main protagonist, and the joint destination or 'product club' model, in which the focal point is the territory. In both models, the role of architecture and the landscape created by the vineyards, wine museums and other resources is increasingly important.

The main challenges are usually investment and the limitations of the territory. Firstly, meeting the expectations of wine enthusiasts is expensive. Second, we have observed, that despite being well-designed, the growth of local projects is often hindered by the lack of assets in their area. For instance, many rural areas lack both the physical and digital infrastructures needed to support successful wine tourism.



It has been shown that leadership strategies are not only essential for individual wineries but can also inspire and set standards for whole regions. Many wineries have strengthened their brands thanks to their tourism-related activities and their efficient use of digital resources for promotion and marketing. Public policies and collective actions, such as wine routes, can contribute to more generalised improvement of a region's quality levels and the creation of synergy amongst wineries.

The imagination and adaptability to change of both wineries and wine tourism operators is incredible. The list of good professional practices and success stories is almost inexhaustible. The symbiosis of wine and tourism is, therefore, a generator of continuous innovations, good business models, corporate social responsibility practices, and a more positive future for consumerism.



At the start of this project, tourism –and specifically wine tourism– was a flourishing economic sector, with UNWTO (2020) forecasting an increase of between 3 % and 4 % in the number of tourists in the world in the World Tourism Barometer. In September 2020, as these lines are being written, and with no end to the COVID-19 pandemic yet in sight, the situation has radically changed. This crisis has come as an unprecedented shock, a 'black swan' of uncertain duration. Tourism has suffered a devastating hit, making its future uncertain and proving its vulnerability, especially in countries highly dependent on it, such as Spain, which owes the largest part of its GDP (11.8 %) to it (OECD, 2020).¹ The forecasts extracted from the latest 'Study on Tourist Demand in Spain' prepared by the tourism team of Simon-Kucher & Partners estimate a loss of 54.4 million international tourists in 2020 compared to 2019, which represents 65 % and a fall in the national GDP of 5.3 % (Web24, 2020).

When it comes to wine tourism, it is too early to assess the consequences of the COVID-19 pandemic. A few months have passed since the start of the pandemic, and the autumn season in European countries is about to begin. In any case, it is possible to affirm that there are substantial differences between countries and regions. In countries such as Spain, which was subjected to strict lockdown and a state of alarm for almost three months, the situation translated to closed establishments and services and workers being made temporarily redundant. The situation after the end of the lockdown period is diverse. Some companies remain closed while others have entirely or partially opened their facilities, depending on their commercial expectations. In almost all cases, companies have reduced their activities, the number of visits they permit and the number of people per group permitted. In regions that are not very dependent on international tourism or that boast exciting tourist attractions and good or acceptable health conditions, the data for August 2020 was very similar to or slightly lower than that of the previous year.

In parallel, the COVID-19 crisis is also hitting the wine sector hard, even though that sector belongs to the agri-food sector. The closure of and restrictions imposed on bars, hotels and restaurants, the obstacles to exports and the fall in demand are proving catastrophic for many wineries. For some of them –mainly small and medium-sized wineries– the drop in tourism and the commercial restrictions are particularly negative, since direct sales, wine tourism and hospitality are fundamental channels for



¹ Of the countries analysed in this book, Spain is followed by Mexico (8.7 %), Portugal (8 %), France (7.4 %), Hungary (6.7 %), Italy (5.9 %), Germany (3.9 %), Chile (3.2 %), the USA (2.9 %) and Japan (2 %), according to OECD data (OECD, 2020).



business. Under these circumstances, only the digital and online market helps offset, at least in part, the negative effects of the pandemic. Unfortunately, the use of digital tools and e-commerce are still underexploited areas for many wineries.

Although the situation will eventually return to 'normal', no one can say how or when. The negative impact is so massive, and the consequences can last so long, that it is impossible to incorporate impact analysis and recovery strategies into this book. We must rely on the ability of wineries and wine tourism operators to adapt to the needs and restrictions of the new scenario to continue making the wine tourism experience attractive and authentic. We believe that sustainability strategies and innovation, along with resilience, will be of great importance for the reconstruction of the industry.



We trust that our book will enrich the debates on wine tourism around the world and that it will be a stimulus for stakeholders and managers in the industry. Personally, we have enjoyed this journey and have learned a lot from coordinating and editing the contents of this book. Visiting several wineries that shared their projects for the future with us has allowed us to gain a better understanding of the current situation and the needs of wineries worldwide. At the same time, the ability of the wine industry to adapt to the post-COVID-19 situation makes us optimistic, and several examples of best practice demonstrate the industry's creativity and flexibility in meeting the challenges of the crisis.

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Acknowledgements

This book is a collective work that has been supported by the collaboration of numerous people and several institutions. Cajamar Caja Rural (Spain) launched the challenge in 2018 to design a project to promote wine tourism in Spain. In March 2019, the UIMP (Universidad Internacional Menéndez Pelayo) added a course at its headquarters in Valencia (Spain) entitled 'Sustainable and Innovative Wine Tourism'. In summer 2019, Professor Gergely Szolnoki from Geisenheim University (Germany) joined the project as an editor to enlarge the international scope of the book. These three main steps led to the creation of an international wine tourism book focusing on innovation and sustainable practices.

The advice of Eduardo Díez Morrás, director of the Vivanco Museum (Briones, Spain), and Luis Vicente Elías helped us to build the framework for the book. Besides our academic backgrounds, personal visits to wineries during the last few years have contributed to a better understanding of wine tourism. Some of these wineries deserve a special mention: Enate (Somontano, Huesca); Bodegas San Alejandro (Miedes, Zaragoza); Pepe Mendoza (Alfás del Pi, Alicante); Ramón Castaño (Yecla, Murcia); Bodegas San Isidro (Jumilla; Murcia); Bodegas Hispano+Suizas and Vegalfaro (Requena, Valencia); Celler del Roure (Moixent; Valencia) and La Viña-Anecoop (Font de la Figuera, Valencia).

The COVID-19 crisis impacted this project in its final stretch. To touch upon this unique situation in the Foreword, several prestigious wine tourism projects were visited in August 2020. The tour allowed us to learn about wineries' capacities to adapt to the new circumstances and their new needs. Many people have contributed to the success of the tour, and we would like to thank them here: Carlos Moro, from Bodegas Familiares Matarromera; Juan Vázquez, of Martín Códax; and Jose María Santos, from Alma Carraovejas. Carlos Moro is a paradigm of innovation and sustainability in the world of wine. Juan Vázquez leads the Martín Códax project, which is a reference for the Spanish wine cooperative world. Jose María Santos directs one of the most spectacular enotourism projects in the Spanish world of wine.

We also want to thank Manuel Romero, director of Dinamiza Asesores; Sara García, manager of the Ribera del Duero Wine Route, Judith Fernández, manager of the Toro Wine Route and Laura Expósito, technician of the Rías Baixas Wine Route, for helping us to identify innovative and sustainable projects in their respective areas.

We wish to thank the presidents of the denominations of origin of Monterrei (Lara da Silva Rodríguez), El Bierzo (Misericordia Bello Pinedo) and Somontano (Raquel Latre Latorre), for sharing their experience regarding wine tourism in their denominations of origin.

Our thanks also go to the people who have attended us on other visits: Roberto Castaño Joaquín, director of the Pagos del Rey Wine Museum (DO Toro); María José Yravedra Soriano, owner of Ronsel Do Sil winery (DO Ribeira Sacra); Jose Manuel Ferreira San Miguel, winemaker at Palacio de Canedo (DO El Bierzo); Mercedes Vázquez del Olmo from the Department of Wine Tourism and Public Relations of Finca Villacreces (DO Ribera del Duero) and Victoria Benavides, owner of Bodega Elías Mora (DO Toro).



In addition, we wish to thank María Garrido, Pepa Fuertes Carballeira, Alejandro López Castro, Noelia Parada Castro, Encarna Segura Moreno and María Rodríguez Leal, of Martín Códax, for their professionalism and cordiality.

No work can cover all dimensions of a particular subject, especially when it is as broad as wine tourism and has an international scope. Our work was very ambitious, and we appreciate the collaboration of the 36 authors from 15 countries who have contributed with their chapters to the success of this book. Finally, great thanks to Cajamar Caja Rural, our publisher, as well as to our home institutions, the Polytechnic University of Valencia (Spain) and Geisenheim University (Germany).



Part I

Strategic Aspects of Wine Tourism



Wine Tourism from a Business Perspective

Kyuho Lee

Sonoma State University (USA)

Abstract

The major aim of the chapter is to explore the business aspect of wine tourism. While there is a plethora of research papers on wine tourism ranging from wine tourist motivation to sustainable wine tourism, there is little research focusing on the business aspect of wine tourism. This study explores the many facets of wine tourism from a business perspective. First, the author examines the key metrics that a winery operator can adopt to measure the effectiveness of winery tasting room operations that rely on wine tourists and winery visitors. Second, the author presents and discusses a conceptual model that illuminates the business model of winery tasting room operations. The study provides winery operators with insightful implications on how to manage successful winery tasting room operations and maximize direct to consumer sales at the winery for wine tourists and winery visitors.

1. Introduction

The growing importance of direct to consumer sales has led winery operators to pay attention to wine tourism. Direct to consumer sales from wine tourists account for more than 20 percent of wines sold in Burgundy, France and 23 percent of wines sold in Alsace, France (Frochot, 2000). In the case of California, wine tourists spend average \$ 730 when they visit a wine region in California (Pellechia, 2017). The wine tourists' major spending during wine tourism includes purchasing wine at a winery, dining at local restaurants, attending local wine events and staying at a local hotel.

Specifically, 3.85 million wine tourists visited Napa Valley which is the most popular wine tourism region in California. Out of the 3.85 million wine tourists who visited Napa Valley 1.2 million wine tourists had overnight visitation in the wine region which means that the wine tourists stay at a hotel in Napa Valley region (Sarfaty, 2019). In 2016, the economic impact of wine tourism in California was \$ 7.2 billion. Specifically, small wineries that do not produce enough volume of wine to distribute wine through a nationwide distribution channel have relied on direct to consumer sales to wine tourists (Hojman & Hunter & Jones, 2012; Insel, 2011).



Ninety-eight percent of US wineries are classified as small wineries that produce fewer than 12,000 cases of wine per year (Insel, 2011). A case includes 12 bottles, 750 ml each bottle. Perhaps, that is because wine is an agricultural product. Most wineries are located in rural areas and have been owned and operated by the same family for generations, producing small amounts of wine each year. Unlike other beverage industries, such as soft-drinks, the barriers to enter the wine industry are relatively low. As a result, there are a large number of small wineries around the world. Hojman and Hunter-Jones (2012) suggest that wine tourism is a matter of survival to small wineries since direct to consumer sales is their only route to distributing wine to consumers.

Unlike their impact on small wineries, wine tourism and winery visitors might be less significant to major corporate organizations, such as Constellation and Treasury Wine Estate, that possess resources to grow, produce, and sell wine by themselves (Fritz, 2015). Gallo supplies their own glass by running the largest glass plants in North America. These corporations have adopted a vertically integrated strategy to increase efficiency and maximize profit by utilizing economies of scale in their operations (Fritz, 2015). Because of their corporate business model, major wine companies do not rely on wine tourists and wine tourism although these firms can provide an opportunity for winery visitors to experience their wine brands, heritage, and tradition through wine tourism.

Several researchers (Byrd *et al.*, 2016; Carsen, 2011; Insel, 2011) posit that visiting wineries is a cornerstone of wine tourism. The major activities of wine tourism, which include education, tasting, hospitality and grapes and wine, occur while a wine tourist visits a winery (Fesa, 2020). Tasting, learning and purchasing wine at a winery is a major motivation for wine tourists during wine tourism. Teague (2020) asserts that wine is an intricate product that has been produced in each wine region with unique grape varietals. Primary wine regions, such as Sonoma, California, Loire Valley, France, and Mosel, Germany, each have a distinctive topography, climate, wine culture, and local food that are of interest to wine tourists visiting different wine regions. Wine tourists can experience the unique, peaceful, and rural atmosphere and landscape of each region (Byrd *et al.*, 2016; Carmichael, 2005). Teague (2020) reports that diverse grape varieties planted in wine regions across the world each possess a different personality and character that coupled with its region's wine heritage have triggered the interest and curiosity of global wine tourists. Consistent with Teague (2020), Beverland and Luxton (2005) argue that winery visitors can experience the authenticity of wine through wine tourism.

Researchers (Byrd *et al.*, 2016; Carmichael, 2005) argue that wine tourism provides winery operators with a number of benefits, including:

- Direct to consumer sales at a winery yield high profit margins to the winery since they do not involve a middleman. Winery direct to consumer sales include the tasting room, wine club members, events, winery web/mail/ phone, and other direct sales (Pann, 2016). On average, in the U.S., tasting room sales and sales from wine club members account for 70 % of a winery's direct to consumer sales (Pann, 2016).
- Wine tourists can have personal and authentic experiences with the winery brand by tasting a variety of wine products, learning the winery's history, and visiting the vineyard (Beverland and Luxton, 2005).



- Satisfactory experiences at a winery positively affect post-wine purchase behavior of winery tourists. After a winery visit, wine tourists purchase more wine and wine varieties produced in the visited region. Thus, the results of the study suggest that an entire wine region benefits from wine tourism (Mitchell, 2006).
- Satisfactory winery visits in the U.S. lead wine tourists to join a visited winery's wine club, which affects a winery's cash flow.

Although the unequivocally positive effects of wine tourism can be found in wine tourism research, very few studies have focused on exploring wine tourism from the business perspective of a winery operator. There is no systematic theoretical framework for wine tourism that illuminates the competitive business strategy of winery operators. Given that and the rapid growth of wine tourism, I contribute to wine tourism literature by addressing the business perspective of wine tourism for a winery operator.

The key objective of the research is a discussion of the key metrics that a winery can adopt to measure the effectiveness of its direct to consumer sales. The author also develops and presents the theoretical framework of a business strategy that illuminates how to optimize a winery's revenue from wine tourism.

2. The Key Metrics of Winery Operations for Wine Tourism

2.1. Winery Visitor Satisfaction

Satisfying visits to a winery are key to attracting and retaining tourists. Prior research suggests that satisfying visits to a winery lead tourists to be loyal to that winery, which increases winery revenues (Lee *et al.*, 2018; Nella and Christou, 2014). Several researchers (Carlsen, 2011; Nella and Christou, 2014) have examined the key drivers that affect winery visitor satisfaction:

1. Intangible Winery Service
 - Staff hospitality
 - Reliability, responsiveness, attentiveness, assurance
2. Tangible Winery Service
 - Quality of physical atmosphere
 - Quality of garden
 - Cleanliness of restroom, tasting room, and winery



- Cleanliness of staff uniform
- Signage to winery on nearby roads
- Parking lot cleanliness
- Availability of tasting notes
- Layout of tasting room operation
- Packaging of wine bottle

Winery service can be divided into two dimensions: intangible and tangible winery service. Intangible winery service deals with staff hospitality, such as the reliability of winery personnel who interact with visitors, responsiveness, attentiveness and assurance. Tangible winery service is related to the physical aspect of winery service, such as the quality of the garden, cleanliness of the tasting room, and the design and layout of the winery tasting room. According to Nguyen and Leblanc (2002), service occurs when there are social interactions between the customer, employees and the physical support system. Thus, the role of personnel in the service organization is crucial to delivering quality service to the customer (Nguyen and Leblanc, 2002). Customer perceptions of the winery personnel such as tasting room associates and tour guides play an important role in wine tourists' first impressions of a winery.

Carmichael (2005) reports that there is a salient difference between wine tourists' expectations of a winery's service quality and the actual service quality they experience. Specifically, there are significant differences between wine tourists' experiences and expectations in areas such as the knowledge of the winery staff, consistency of service and promptness of service (Carmichael, 2005). One of the reasons that the quality of winery service has lagged behind wine tourists' expectation is related to the seasonality of wine tourism. Wineries rely on part-time workers in the tasting room during the peak season from April to October. Thus, seasonal part-time tasting room associates who are not familiar with the job might not be able to meet tourists' service expectations and provide the expected personalized service.

Lee *et al.* (2018) study on winery visitors' spending highlights the importance of intangible service offered at a winery. The study reveals that staff hospitality is the significant major factor that affects winery visitors' actual spending at a winery. Interestingly, staff hospitality impacts visitor spending more significantly than does the quality of the wines tasted. Staff hospitality influences winery tourists' satisfaction and experiences significantly (Lee *et al.*, 2018). According to Berry and Seltman (2007), "customer experience with the organization is the customer's cumulative experience interacting with the organization". Berry and Seltman (2007) assert that the customer experience affects the brand equity of an organization. Those who have a positive experience at the winery will revisit it and spend more money since they trust the organization.

Conducting regular customer satisfaction surveys is a way to assess the service quality of a winery and winery visitors' experience while there. By conducting satisfaction surveys, a winery can identify the areas they need to improve. Inviting a small group of loyal winery visitors helps a winery understand perceptions of its service quality and its visitors' satisfaction.



2.2. Churn Rate

A winery operator can use the churn rate of the wine club membership to gauge visitors' satisfaction and loyalty. Winery visitors and tourists who are not satisfied with the winery's service, quality of wine and value of the wine club membership are more likely to drop their club membership. Churn is an effective tool a winery can use to quantify winery customers' satisfaction and loyalty (Jeffrey, 2010). According to Jeffrey (2010), churn can be defined as "... the percentage of existing customers who chose not to do business with you".

Churn rate can be calculated as:

$$\text{Churn Rate} = \text{Customers Lost} / \text{Total Number of Customers}$$

In terms of the churn rate of wine club membership, it can be calculated below:

$$\text{Churn Rate of Wine Club Membership} = \frac{\text{Members who drop Wine Club Membership}}{\text{Total Number of Wine Club Members}}$$

In general, the churn rate of wine club membership among U.S. wineries is high (Pann, 2016). On average, wine club members maintain wine club membership of a winery for about 28 months (Pann, 2016). Wine club members in Napa wineries spend an average of \$ 1,134 a year and \$ 2,587 during their entire membership period at a winery (Pann, 2016). By reducing the churn rate of wine club membership, a winery operator can increase the lifetime value of a wine club member, which leads to an increase in a winery's profits.

2.3. Lifetime Value of a Winery Visitor

The lifetime value of a customer is the net present value of a customer (Jeffrey, 2010). According to Gallo (2014), net present value is defined as "the present value of the cash flows at the required rate of return of your project compared to your initial investment". In other words, the lifetime value of a customer is the future cash flows that a winery visitor can bring to the winery during their lifetime at the winery. Santos and Richman (2016) assert that the underlying basis of the lifetime value of a customer is that not all the customers are the same in terms of the profit of a winery and value.

An easy way to calculate the lifetime value of a winery visitor is below.

$$\begin{aligned} \text{Lifetime Value of a Winery Visitor} &= (\text{Average Price}) * (\text{Number of Visits in a Year}) \\ &\quad * (\text{Average Number of Units Purchased per Visit}) * (\text{Number of Years}) \\ &\quad - \text{Initial Cost of Acquiring and maintaining a customer} \end{aligned}$$

Source: Santos & Richman (2016).



Santos and Richman's model on the lifetime value of a winery visitor above does not reflect a positive word-of-mouth variable. Those who are loyal to the winery tend to spread a positive word-of-mouth to their friends and relatives, which could increase the lifetime value of a loyal customer to the winery. Thus, the actual lifetime value of a loyal winery customer could be much higher than that calculated by Santos and Richman's model.

Understanding the lifetime value of a winery visitor provides insight into a winery based on the importance of winery visitor retention. A winery can develop a customer database system to keep track of each of visitor's spending so capture the lifetime value of a winery visitor. A winery may identify each year's top spenders and send a bottle of free wine or host an event and invite loyal customers as a token of appreciation for their loyalty.

3. Key Metrics to Measure Winery Tasting Room Effectiveness

The winery tasting room is the core of wine tourism since most wine tourists visit the tasting room to learn, taste and purchase wine. I summarize the key metrics a winery operator can adopt to effectively manage tasting room operations (Table 1).

3.1. Winery Revenue Management

Wineries located in a well-known wine region are crowded with winery tourists on Fridays and weekends which cause a number of operational challenges to wineries (Lee, 2015). Winery parking lots crowded with cars and tour buses are not uncommon on weekends and holidays. As a result, waiting times for wine tastings and winery tours can be long. Some wine tourists might decide not to do a wine tasting nor purchase wine after they see a long line for wine tasting. Even worse, winery staff may not be able to provide the best service to tourists on weekends due to limited staffing.

Not surprisingly, some wine tourists may not be interested in purchasing wine while they visit a winery. They may occupy prime winery real estate such as the winery's garden and outdoor seating area to take photos without purchasing any wine or engaging in any activities, such as tasting wines. Some tourists may never come back to the winery. More importantly, this could negatively affect the satisfaction of loyal customers as the loyal customers might have to wait a long time to purchase wine or to be seated in the wine tasting room. Winery revenue management deals with how to effectively manage a long waiting line at a tasting room and improve the service delivery process in order to improve winery revenue. If a winery can serve 10 more winery tourists per day from Friday to Sundays by reducing a waiting line at the tasting room, a winery can serve 120 more winery visitors a month. Below I suggest a few tactics winery managers can consider adopting.



Table 1.
Key Metrics of Winery Tasting Room Management

Metrics	Formula	Implications of the Metrics
1. Conversion to Purchase	Number of transactions/ Number of winery visitors	The conversion to purchase metric indicates how many winery visitors make an actual wine and/or merchandise purchase from the winery. A winery tasting room associate's knowledge, hospitality, positive attitude and professionalism can affect a visitor's intent to purchase wine at the winery. Providing ongoing coaching and sales training to tasting room associates is crucial to increasing the conversion rate to purchase. An employee incentive program based on performance can be an option to motivate winery tasting room associates.
2. Average Order Value	Total Net Revenue/ Number of Transactions	This metric indicates the average amount of money per transaction at the winery. A winery might consider product mix and sales promotions using the metrics. A winery manager can gauge if they target the right market segment and target audience based on the metric.
3. Wine Club Conversion	Number of tasting room guests who join the wine club/ Number of visitors	Wine club membership provides a winery with steady cash flow. Wine club members can be an asset to the winery. A winery can continue to form relationships with loyal customers through the wine club. A winery manager can create and host exclusive events for wine club members so that the members are involved with the winery on a regular basis.
4. Labor % of Revenue	Total labor costs/ Net revenue	This metric helps a tasting room manager develop effective staffing and annual budget. The number of winery visitors fluctuates depending on the season. A winery tasting room manager can be strategic and flexible in staffing using this metric. Total labor costs include wages, benefits and commissions.
5. Profit	Revenue (# of cases sold x price per case) - Costs (Cost of goods sold + cost of sales+ administrative expenses + Interest expenses + taxes)	The wine business is complex. A winery operator purchases grapes and barrels 2-5 years before the wine is produced and released. Thus, a careful financial analysis and planning is important (Fritz, 2015). Understanding profit is fundamental to winery operation.

Sources: Friedman (2015) & Fritz (2015).

3.2. Reservations

Using a reservation system can be effective in managing a winery's visitor line. Only those customers who make a reservation for the tasting room in advance are allowed to do wine tastings at the winery. By using a reservation system, the winery can provide more competitive and customized service to visitors. The winery can also predict the number of visitors per day based on the reservation system, which allows the winery to schedule the right number of tasting room staff. Loyal winery customers might spend more money at the winery as their satisfaction and loyalty toward the winery increases through the winery's personalized service.



A winery's type (e.g., luxury, high-end or casual, informal) might be a factor in determining whether a winery should adopt a reservation system their tasting room operation. If a winery is positioned as a luxury, high-end establishment adopting a reservation system is recommended as its visitors expect personalized service. However, if a winery is positioned as an informal, casual winery, it may rely on walk-in visitors, and that winery should be careful about implementing a reservation system. An effective reservation system allows a winery to collect customer data, such as email address, phone number, and home address, so that the winery can use the customer data strategically to develop an effective targeted marketing strategy.

3.3. Standardized Service System

A winery may want to develop a standardized service system in all aspects of its winery operations in order to provide consistent service to winery visitors. A standardized service system provides a winery with benchmarks that indicate if the winery is achieving its goals related to enhanced service quality. To develop a standardized service system the following steps can be taken.

- A. Identify and list the key areas of service where there are any interactions between a winery visitor and winery staff.
- B. Standardize service procedures and quantify service procedures in the key areas of the winery where there are interactions between winery visitors and winery staff.
- C. Monitor and evaluate major service areas of winery operations periodically, based on the service standards to improve the winery's service delivery process.

4. A Case Study

The winery is located in Sonoma County, California and mainly produces ultra-premium Pinot Noir and Chardonnay. The winery owns more than 71 acres of vineyards in Sonoma County, California. The winery is fully integrated as it produces wines at the winery's production facility, using grapes mostly harvested from the winery's three different vineyards, and distributes its wines through direct to consumer sales. Specifically, the winery's direct to consumer sales are generated from wine club members, the winery's tasting room, the internet, and onsite events mainly among wine club members. The winery has primarily focused on direct to consumer sales because those sales are much more profitable than distributing their wines through a middleman. Furthermore, the winery has been able to maintain consistent pricing of its wines, which may affect the winery's brand equity. The price of the winery's wines is ranged between \$ 50.00-\$ 70.00 per bottle of 750 ml.

a) Winery Satisfaction:

Given that the winery relies on direct to consumer sales, satisfaction among winery visitors is crucial to maintaining visitor loyalty, which significantly affects winery revenues. The winery



uses winery visitor satisfaction as one of its key metrics for measuring its operations. They have created a survey to measure winery visitor satisfaction on a variety of aspects about the winery's services, ranging from the wine tasting experiences to staff hospitality. The winery regularly distributes this online satisfaction survey to winery visitors to gauge their continuing satisfaction.

Based on the winery's internal data and the results of the customer satisfaction survey, visitor satisfaction with staff hospitality is the key driver of winery visitors' actual spending at the winery (Lee *et al.*, 2018). Surprisingly, visitor satisfaction with the winery staff's hospitality affects visitors' actual spending more significantly than do other service areas, such as the quality of wine tastings (Lee *et al.*, 2018). The results of the study suggest that intangible services such as staff hospitality play a pivotal role in driving visitor spending at the winery. They are as important as the core product of wine tourism – the wine, a tangible agricultural product.

b) Adopting a Reservation System

The winery used to accept walk-in winery visitors. However, the winery operator was concerned that a high volume of walk-in visitors during busy weekends and holidays was hampering the quality of the winery experience among the winery's loyal customers, such as longtime wine club members who look for a more tranquil and less hectic experience at the scenic winery. The winery has therefore shifted from an "open to the public" to a "by appointment only" approach for wine tastings to provide better customer service to regular winery visitors. After making this change to requiring reservations, the number of annual visitors to the winery decreased from 25,000 to 15,000. Surprisingly, however, the winery's revenues have not decreased, despite the forty percent decline in visitors.

The winery has successfully managed this shift in visitors by providing more personalized service to the winery's loyal customers, which has increased satisfaction with the winery among those loyal customers. As a result, the lifetime value and retention rate of loyal customers has been enhanced. The case of this winery illustrates how the number of winery visitors may not necessarily correlate positively with a winery's revenues. Rather, the loyalty of winery visitors driven by satisfaction with a winery's service can affect a winery's revenues.

5. Conclusion

This chapter explores winery operations and wine tourism from the business angle of a winery operator. Figure 1 presents the theoretical business framework of wine tourism from a winery operator's perspective.

A winery is just like a hospitality organization such as a hotel. A hotel offers not only tangible products such as a bed and a bathroom, but also intangible service products, such as hospitality and customized service to its customers. Similarly, a winery's core product is wine, a tangible agricultural product. Producing a high-quality wine has been a priority to wineries, which illuminates a winery's reputation. Wine is a hedonic product, which consumers drink for leisure, pleasure, and socializing with other

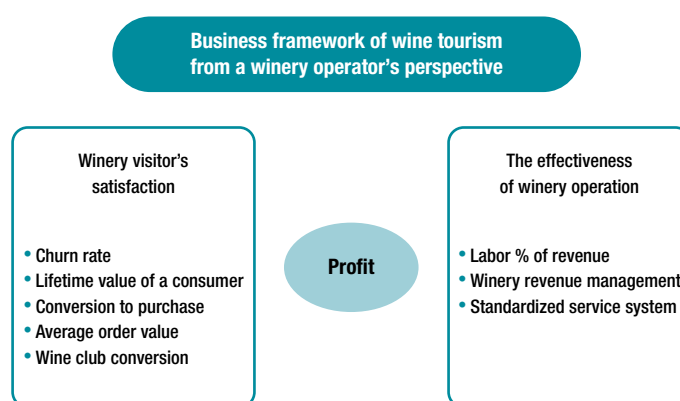


people (Bruwer and Alant, 2009). In a similar vein, wine tourists visit wineries to discover new wines and experience the authenticity of a wine region and wineries.

Wine tourists look for both high quality wines and personalized service and hospitality from a winery. In addition to the core product of wine tourism – wine - creating memorable experiences through the augmented services offered at a winery, such as the tasting room, wine education, production/ facility tours and the landscape of the winery, are antecedents to winery tourists' satisfaction and loyalty, which leads to a winery's increased profits (Byrd *et al.*, 2016; Lee and Ha, 2014).

Figure 1.

Business framework of wine tourism from a winery operator's perspective



Source: Friedman (2015) & Fritz (2015).

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Daily Practices in Wine Tourism

Improving Service Quality and Enhancing the Visitor Experience

Vinka Woldarsky

Universitat Rovira i Virgili (Spain)

Abstract

There is no doubt that wine tourism is changing the wine business as it represents a valuable opportunity for wineries big and small. However, few wineries have mapped out a plan for their wine tourism business, often resulting in average visitor experiences and missed opportunities. It is more important than ever to create emotional experiences and generate feelings of wellbeing for visitors. Particularly after the months of social distancing from COVID-19, there is a hunger to create connections and rebuild communities. This chapter offers best practices in wine tourism in daily operations that could be considered innovations for a lot of wineries. It is based on theory, field research and real-life knowledge and brings practical and valuable insights for wine tourism managers in order to enhance or improve wine tourism offers. Finally, wine tourism is a business, but it is a hospitality business, where the private and personal relationship is essential.

1. Introduction

Wine tourism has become a buzzword within the wine industry. It is touted as a winery's golden ticket to increase wine sales, to turn visitors into brand ambassadors, to get repeat visitations, and to achieve brand recognition and brand loyalty (Nowak and Newton, 2006; Carlsen and Charters, 2006; Carlsen 2006 cited in Carlsen, 2004). Indeed, wine tourism can be a tempting option for any winery. It offers the rare and unique opportunity to promote your wines and your brand directly to the end consumer, something that is unimaginable in most industries. Yet, the perception that these gains come automatically by simply offering tours is a major misapprehension.

The tourist experience is complex; there are various elements and attributes to consider that affect the visitor experience (Carlsen and Boksberg, 2014), from the moment your visitor makes contact with your brand right up to the end of the visit. It is vital to consistently offer quality experiences and maintain high standards in service, hospitality and communication. With increased competition in



tourism offerings in a destination, it is the goal of the winery to offer experiences that are worth your visitors' time and money (Roberts and Sparks, 2006). Furthermore, in a post COVID-19 world, it is vital to make each and every visit count as demand will surely be impacted. Following the prolonged months of physical distancing and self-isolation, your visitors will not squander their time, money or energy and you must take advantage of the unique opportunity that it gives to you to connect with them in a much more profound way. Guests will desire more personal connections, personalized or exclusive experiences. Not only will they desire special moments with winery staff, winemakers or the proprietors as before, but there will certainly be an uneasiness or fear of being in large public groups. As a result, it is more important than ever to understand how to create moments of connection, generate emotion and enhance feelings of safety and wellbeing for your visitors.

It is important to remember that wine tourism is not merely another sales channel or a way to achieve additional revenue. It is direct marketing, public relations, sales, service, all of which fall under the umbrella of tourism and hospitality. It requires skilled personnel that are highly knowledgeable about wine, but also other areas of the wine business and the tourism offerings in a destination. It is a high touch business where communication, cultural sensitivity, and emotional intelligence are vital for building relationships with clients and visitors.

This chapter will focus on best practices in wine tourism, particularly visits to the winery, tours and tastings. The guidelines offered are based on theory, field research and real-life experience (Woldarsky and Geny-Denis, 2019). We will begin with a brief review of some fundamentals of wine tourism, including understanding wine tourist and their expectations. We will then look at best practices in service, hospitality, ways to improve the tour and tastings, and how to take advantage of different spaces in the winery. It is important to remember that there is no one-size-fits-all in wine tourism. The needs, resources, and characteristics of each winery are different, and so are the tourism flows in a region, the objectives and the target market of each winery. The best practices provided in this chapter offer key insights into what it takes to run a successful wine tourism program. It is vital to adapt the recommendations to suit your needs and your resources.

2. The Different Types of Wine Tourists

There is no one wine tourist. Various studies (Bruwer & Alant, 2009; Charters & Ali-Knight, 2002) have attempted to define who the wine tourist is based on wine knowledge, wine engagement, consumption habits, and general characteristics yet it is difficult to pinpoint who this person is. We know that wine is not a determining factor in visitor motivation nor does wine quality impact visitor satisfaction (Shapiro and Gomez, 2014), and the motivation for traveling to a wine region may be varied. Yet, if we are to take the position that each and every person who enters our winery, visits our wine shop or travels to our wine region with the purpose of having a wine experience is a wine tourist then we will have better results. This means that regardless of any economic transaction occurring, we must treat each person as if he or she was a paying visitor.

It is important to develop special relationships with all your visitors. Not only is it kind, but it is the best way to build a strong and loyal customer base. Each person requires special treatment and should be treated as an honored guest. Always remember that your visitor, whether paying or unpaying, has



invested the most precious thing they have –their time– to visit you. They have numerous wineries they can visit, and other non-wine related activities they can choose from. Thus, it is important not to take any visitor for granted. Furthermore, we must not forget that every interaction can result in positive or negative word-of-mouth and electronic word-of-mouth. Our social interactions have changed considerably due to the use of technology. Social media has given each person a megaphone to share their opinions with the rest of the world. A picture, a post or a review by one individual can have a large impact, and can reach a variety of audiences, beyond wine lovers or trade professionals.

To create these strong relationships, we need to know what the expectations, needs and desires of our visitors are. The various groups of wine tourists:

1. General tourists and end consumers;
2. Non-professional wine groups, including aficionado wine club members or culinary groups;
3. Professional wine groups, such as sommeliers, wine students, university or educational groups;
4. Clients, including distributors, retailers, and restaurateurs;
5. Media, journalists, critics, writers, and influencers.

It is important to understand that desires, needs and expectations move from specific to general from one group to the other. For example, a journalist will visit a winery to write a story and is in need of specific information. They may need to know about soil property and characteristics, rootstocks, vine clones, vintage conditions and detailed winemaking techniques. They will need technical sheets and will require a very specialized guide such as the winemaker or someone from the winemaking team. On the other hand, a general tourist may want to know about the region, the family, and other attractions. They may want a guide that entertains and is able to communicate wine in a non-technical way. Wine connoisseurs or aficionado groups will want a bit of everything: a specialized guide to teach them, a tasting of rare wines or back vintages, and entertainment. They are often willing to pay a premium to be able to taste wines that are inaccessible and to spend time with the winemaker. Each group is slightly different but they are all wine tourists. Ultimately, anyone who visits wants and expects to have a great time.

Following the coronavirus pandemic, wine tourists will be much more selective about where they spend their time and money, and most importantly, who they want to be with. They will be more motivated to visit and revisit places where they have made a special connection with the staff, owners and the people at the destination. Thus, getting to know the wine tourist as an individual will be vital to a successful wine tourism program. It is our job, as wine tourism professionals, to meet and exceed the expectations of our visitors. Consequently, we need to get to know the visitors we receive and what we can do to make the visit talk-worthy. The tourist/consumer group is the most important group, yet the one we probably know less about. There are studies that have tried to group tourists into different segments such as wine lovers, wine interested, and curious tourists (Hall, 1996 cited in Charters and Ali-Knight, 2002) in an attempt to understand their motivations and desires. While this kind of segmentation is helpful as it provides us with insights into different groups, it is very difficult to



know how to use this segmentation in real life situations. The chances of only having “wine interested” visitors in a tour or tasting are slim. In fact, in group settings, even among professional visits, you will often have a variety of visitors who have a variety of interests that go beyond wine. It is the job of the guide to discover those interests, desires and needs. And it is through conversation and dialogue that this is achieved.

3. Best Practices in Daily Visitations

3.1. Ask Open-ended Questions

It is quite common to arrive for a tour and have the guide immediately jump into their script or delivering their usual speech. Whether this is because of time constraints or simply habit, it is vital to take the time to get to know your group of visitors by asking open-ended questions. The following questions are a must in any tour or visit:

- What is your name?
- Where are you from?
- Have you been to (country/region) before?
- How did you hear about us?
- Have you visited a winery before? Where?
- What kind of wines do you like?
- How much do you know about wine?

As rudimentary as it seems, basic introductory questions are fundamental and serve many purposes. First, they make your visitor feel valued and acknowledged. Learning their names is an indication that you recognize them as human beings, not just customers. While it may be difficult to learn everyone's name in large groups, in small groups and private visits this should always be done. Secondly, asking questions about previous visits and wine knowledge allows you to learn their interests, gauge their level of involvement in wine and understand what their expectations are about the visit. There is a reason they came to visit, so take a few minutes to get to know them and find out whether they have come to learn about winemaking, about the region, or simply to enjoy the incredible views. Finally, finding out what they know about wine will help you discuss topics that will be much more interesting to your visitor and allow you to tailor the tasting to their level of knowledge. By starting off the visit with a brief conversation, not only will it help you to adapt the tour but it will allow you to deliver a relevant and personal experience.



3.2. *Provide More than Good Service*

When it comes to tourism, good service is an important part of the daily operations and processes for effective delivery of our product or experience. In wine tourism, visitors expect good service as a rule, not an exception. This is basically, “getting what you paid for”, the transaction between the money they paid and what you provide in return.

To provide good service, at the very minimum your wine business should have the following documents:

1. Company service standards.
2. Code of conduct.
3. Procedures to follow during a visit, tour, and tasting.
4. Policies regarding inebriated visitors, complaints and other issues.
5. Comprehensive and ongoing staff service training.

It is important to take the time to outline policies as it will help streamline procedures, set standards and provide clear rules in a rapidly changing environment like the tourist one. Having written documents will outline the responsibilities of your employees so that it is clear what is expected.

Even so, while service procedures are important, it is also important that your staff know when to adjust or adapt in order to create a more memorable experience. For instance, leaving visitors waiting outside the shop or tasting room instead of inviting them in before opening hours is not just bad business, it is not very kind. Further, while the service you provide can be technically good, relying just on good service will do little to move your visitor. As stated by Gilmore and Pine (2002), “Having nothing go wrong is not the same as having everything go right. Moreover, such an approach alone falls far short of intentionally creating personal memories “to entice guests to come back time and time again” (p. 87). Consequently, creating connected experiences requires applying hospitality in the wine tourism setting.

Hospitality may seem like another buzzword, but it is an intangible element that plays a very important part in the overall experience. Hospitality means treating your visitor as part of your family or a close friend, not just a stranger or a person in a business transaction. What makes for truly great hospitality is getting to know your visitors through dialogue, conversation, empathy and genuine interactions. In fact, being “real” is rated highly among visitors and has been shown to increase sales and brand loyalty (Charters *et al.*, 2009). It is through thoughtful actions that you make your visitor feel welcomed and reassured that they have made the right choice in visiting you.

Here are a few examples:

- Greet your visitors within the first 15-30 seconds of arrival. If you are busy with other guests, be sure to communicate this to your visitor in a friendly manner.



- Offer visitors a glass of water and a place to rest as soon as they arrive.
- Offer to make reservations at a restaurant or hotel.
- Offer to take their picture.
- Show your guest where the restroom is instead of telling them where it is.
- Carry their bags to their car.

Please keep in mind that hospitality may seem obvious, but it is vital that you teach and train your staff ways they can be more hospitable. Likewise, be clear on what kind of behavior is unacceptable and inappropriate, such as talking negatively about your competitors or previous visitors. Unfortunately, there are many examples of poor behavior from front-line staff. What is more, a visitor will often remember these experiences more vividly than those of great service and hospitality. However, it is worth noting that this behavior is normally not out of malice or disrespect, but an unawareness of hospitality standards or cultural differences, and a lack of training or support from management.

3.3. Nurture Your Guides

People are our biggest asset when it comes to wine tourism. We often overlook their vital importance by focusing on other aspects of wine tourism business, and yet research indicates that winery staff is one of the most important attributes of a visit and has the greatest impact in customer satisfaction (Lee and McCole, 2015; Carlsen and Boksberg, 2014; Shapiro and Gomez, 2014). The guide, winemaker, sommelier, wine store clerk or whoever has direct contact with your visitors has an incredibly important role in the winery experience. They are the face of the company and the way they interact with visitors communicates the values of the company and will leave an impression about the company as a whole. While it is clear their role is fundamental, there are few wineries that invest in the front-line staff and give them the tools, training and support needed to do their job.

The wine guide has multiple roles and requires both soft and hard skills for the job. The guide educates, entertains, promotes, protects, and shares their passion with those that he/she guides. Recently, various wine associations, such as the Control Board of DOCa Rioja (Spain) and ViniPortugal (Portugal), have released wine education courses for professionals and non-professionals alike. Further, the Control Board of DOCa Rioja has offered an online wine tourism training course, which is open to the public. While these courses provide the basics in wine knowledge and can help guides with product knowledge, tourism is a high-touch industry, one that requires skills beyond specialized knowledge. Guides require interpersonal skills, including communication training and cross-cultural awareness. Training should be done in person, which allows the guide to practice, to role-play, to find ways to communicate to different audiences.

Here are a few key insights about your guide:

- Guides are just as important as your brand managers.



- Guides must be given the proper tools, training and feedback.
- Communication is everything: Guides require solid language skills, social skills, including appropriate body language, eye contact, emotional attentiveness, listening skills, ability to control conversation.
- Interpersonal skills: guides must display self-confidence, maturity and professionalism, they must be able to manage relationships, engage others, get others' attention, and handle groups.
- Product knowledge: guides requires extensive understanding of viticulture, winemaking, wine tasting, talking about wine to different audiences.
- Additional knowledge of regional history and culture, attractions and services.
- Require sales skills and sales training.
- Overall, they should love what they do, have fun doing it and it should show.

Remember that the role of the guide is not an easy one; it has been shown that they suffer from burnout, boredom due to the repetitiveness of tours and speeches, self-doubt, insecurity and anxiety (Ap & Wong, 2001). In addition, the working hours of the tourism and hospitality business are weekends and holidays, and hours often vary depending on demand, which can result in a high turnover of staff. But it is worth investing in your staff if you want your wine tourism business to succeed. Front line staff are the lifeline of any wine tourism business and it is essential to keep happy and motivated staff. Consider ways to keep staff motivated and stimulated, such as offering scholarships for wine certification, language courses, public speaking training, or other activities that will help them perform better. A strong workforce is one that is passionate about the company but also feels valued and recognized by their employer.

3.4. Picture perfect spaces

Appearance matters. Visitors will judge a book by its cover because aesthetics in the winery setting and its surroundings have a direct impact on the way visitors feel, and their desire to revisit (Quadri-Felitti and Fiore, 2013). Various wine tourism studies reveal that aesthetics is an important attribute in customer satisfaction, and has the greatest impact in memory building (Quadri-Felitti and Fiore, 2013; Bruwer and Alant, 2009; Orsolini and Boksberger, 2009 cited in Carlsen and Boksberger, 2012). With the exception of a few wineries that were specifically designed to be attractions or architectural masterpieces, most wineries were built to be production centers for winemaking. Some wineries have the advantage of possessing unique characteristics and impressive heritage, but this is not always the case and wineries considering wine tourism will have to carefully examine which areas will be used for wine tourism purposes or shown to visitors. For example, an attractive and inviting space will make your visitor feel inspired, excited or relaxed. On the opposite end, a space that has no warmth or character will make your visitor feel bored, gloomy and turned off.



Walk through your winery, visitor space, tasting room, and even the vineyards, and try to look at your spaces through the eyes of a visitor. What is that space “saying”? What is it not saying? Is it what you want it to say about you and your brand? Think about how the visitor will feel walking through your winery or sitting down in the tasting room. What do they see or smell? What do they hear? Is it inviting, inspiring, beautiful? Likewise, are you showing areas that are unique, different and those that make the experience special? It is quite common for winery tours to include areas that are visually unappealing and unattractive, for example the bottling line or packaging area. If your visitor spaces do not make a positive impact, you will need to make changes to the tour route, tasting area or find spaces that are worth talking about. Spaces with views of the vineyard or those that take advantage of the landscape will add much more to the experience. Unique spaces, such as old cellars, impressive lookouts facing viewpoints overlooking the vineyards, iconic winemaking objects like amphorae or even modern features like pools, gardens or artwork make the winery distinct. Find spaces that increase the good feelings of your visitors, think about lighting, music, aroma, and extra touches like flowers, books, antiques or old wine bottles that can add a touch of romanticism or nostalgia. Add photos or maps to empty walls or spaces that seem cold. If you intend to cater to large volumes of visitors or have the budget to invest, then consider working with professional designers and architects. Professionals have the expertise and will be able to work with you to design the venue and spaces that best represent your brand. If you have a limited budget, there are other ways to improve the look of the visitor center that require small investments.

3.5. Rethink the Winery Tour

Most winery tours follow very similar routes: starting from vineyards to grape reception, fermentation room, barrel cellar and then tasting. But following the path of the wine, from vine to bottle, is just one way of showing your craft. There are many other ways to educate about winemaking while providing a different and engaging winery tour. The tour should highlight the places that make your winery special and set you apart. It is not necessary to include everything during the winery tour because there are areas in the winery that have little visual appeal or have no real ‘feel’ to them. These areas can be uninteresting and easily forgotten by the end of the visit.

To design your tour, you should be thinking about your market, the visitors you receive or want to receive and what their interests are. If you have more than one kind of visitor segment, offer different experiences for each segment, including different tours in the winery. For example, high-involvement wine groups, such as aficionados or tasting clubs, may want to see the production areas, fermenting tanks, laboratory, barrel cellar and the aging room, but a general visitor may find some of those places uninteresting. Consider creating two different tours and market those accordingly in order to attract different audiences. Similarly, if you work with tour operators and agencies, offer special and exclusive tours and tastings just for them. Their clients are expecting something different than the general visitor, which is the reason they hire tour operators. Nurture the relationships you have with tour operators and their clients.

The entire visit must be mapped out, from start to finish. Think about how your visitor will move and navigate from place to place, if they must go up and down stairs. Remember that most people have a short period of attention, and often get tired of walking or standing around. This is especially



important for gentle-walkers or children. Fragmented routes and long routes are time consuming, and not suitable for a variety of visitors.

Here are some questions to ask yourself:

- Is the tour too long or too short? Does it have too many steps?
- Is the route suitable for large groups? How many people can fit comfortably at each stop?
- Is it suitable for wheelchairs, strollers? What about gentle walkers and children?
- Is it noisy? Can the visitors hear what you are saying?
- Are there any safety concerns, such as awkward steps or corridors, poor lighting, reduced visibility, hoses, equipment, or wet surfaces?
- Are there 'stops' with visual appeal? People want photo-ops, are you giving them enough photo-op spaces?
- How can you enhance spots that may be dull or uninteresting? Can you add interpretative signage, use props, or should you eliminate that spot altogether?
- What will you discuss at each stop, why and for how long?
- Does the tour end at the wine shop or tasting area?
- What is the "traffic" like on the tour? Does it flow easily or can it get congested at certain stops?

Finally, prepare for the unexpected, such as rain, snow or weather conditions that can interrupt your usual route. Have a back-up route or make sure to communicate any changes to your visitors prior to their arrival.

3.6. Branded Spaces are a Must

The unique aspect of wine tourism is that you have your end consumer on your premise, at your door, seeing, feeling and experiencing your brand. Visitors enter your world; they are completely immersed in the brand world (Mossberg, 2008). It is important to take advantage of this opportunity by creating branded spaces.

Branded spaces reinforce who you are, tell your story, which can help you build brand equity (Aaker, 1996). Having your brand clearly visible in its different forms (crest, logo, symbol, slogan or iconic colors) will strengthen the brand in the visitors' mind during the visit: they remember where they are, they remember what you 'look' like and next time they are at a wine shop, they recognize the brand



which makes their purchase easy. In addition, branded spaces are another way of promoting and advertising your winery through online networks (Bruwer and Reilly, 2006). Social media has changed the way we share information with our family and friends. Photos are now the physical proof that “I’ve been there”. It is important to have spaces within your tour and at the estate that are branded. That is, spaces that are easily identifiable as your winery because of a strategically placed logo, sign or any other brand symbol. This is where your marketing happens – visitors will take photos and share those on social networks.

Here are some key points to remember:

- The winery name should be easily visible at the entrance to the estate.
- Set up spaces or stops within the tour that offer a beautiful backdrop.
- Have your winery name, family crest, symbol or logo visible in various places and parts of the tour.
- Offer free Wifi or hotspots to encourage real-time posting.
- Let your visitors know of any hashtags unique to your winery.
- Use glassware that has your winery logo or crest on it.

The goal of branding spaces is to remind your visitors, long after they have left, where they were and who you are. Photos also serve as postcards and souvenirs; they are how your visitors will remember the visit.

3.7. The script: Why, When, Where and How

Winemaking processes and procedures are similar all over the world, and the wine consumer is much more knowledgeable about wine than ever before. There are now more courses, tastings and all sorts of wine events that have brought the consumer closer to understanding the process of making wine. The wine tourist has travelled in search of something unique, something that sets your winery apart. There is only one thing that truly sets you apart from any other winery in the world: your story. It is your story –the stories of the past and of the present– that cannot be replicated or copied by another other winery.

It is important to get to know your group of visitors and understand what it is they came for and what they are interested in. Then you can modify the script to what they want to know and stories that are relatable. Your visitors have different wine knowledge and interests. Do not assume they are all the same. For example, a group of retired American visitors are not the same as a young French couple. The generational and cultural differences mean they respond to different themes and stories. Get to know them and be flexible and adaptable in your “script”. Remember that if you have supporting material, such as interpretive displays or pamphlets, you do not have to repeat the winemaking processes. Having these supporting materials will help you immensely because it cuts down on time,



on long explanations, and lets you focus on how your wines are different and why you choose to make wine as you do.

Key points to consider:

- No one likes a scripted tour but every winery must have a script prepared for the tour and tasting.
- The script is a supporting and training tool, intended to give directions about what should be said and where. It is meant to be adapted by the guide not memorized.
- Know what you want to communicate, why you want to communicate it, and when within the tour.
- Focus less on figures and numbers and more on stories. Some examples include talking about the architecture of the winery, history of the region, anecdotes, and family stories to share and tell.

For general tourists, there is too much winemaking information and they will quickly lose focus on what's being said. Your guide will also lose interest in repeating so much information and will lower their enthusiasm level.

3.8. Master the Tasting

The tasting is probably the most anticipated part of the winery tour. Contrary to providing a tasting for wine professionals, where you present each wine and explain technical aspects such as vintage conditions, winemaking methods, barrel aging etc., a tasting for tourists should be an experience. A tasting experience follows the same concept as the entire visitor experience – engage your visitor by stimulating their senses and providing pleasure. Make it fun. The tasting should enhance good feelings and put your visitor in a happy mood. A relaxed and happy visitor is much more open to subtle persuasion and suggestions than one who is uninterested or overwhelmed by trying to taste like a professional.

For your visitor, the tasting is their chance to relax, to get to know each other (if it is a public/group visit) or share a special moment with friends. For you, it is your chance to show your wines, to wow your visitors and to set up a sale. It is not necessary to stick to the facts of each wine. You can present your wines by explaining the label and design, the story behind of a particular wine, share interesting anecdotes about the vintage year. Like many parts of the visits, a guide with good communication skills will be able to pick up on the interests of the guest and find ways to tailor their wine presentation to something that is much more relatable and less intimidating to the visitor. Or, on the other hand, offer detail and further technical information should the visitor show interest or want specific information. The key is understanding your visitor and adapting the tasting so that it is enjoyable. Often times, it is as easy as letting them drink a glass of wine in a beautiful setting.



Here are some points to consider for the tasting:

- Less is often more in a tour and tasting package. Visitors get bored, tired, and overwhelmed if there are too many wines, particularly after a very long tour.
- Offer wines that are not readily available at local bars or shops. This makes the tasting memorable and special.
- For flights think about as vertical, horizontal, oaked vs unoaked, barrel samples, parcels tastings, etc.
- Measure each pour and offer different tasting sizes – 6oz, 8oz or glass.
- Invest in a Coravin to pour rare or expensive wines.
- Open something rare or special for special visitors.

A good tasting experience will help you sell those higher end wines. Entry level wines, those that can easily be found at supermarkets, do not give a special feeling. The tasting should offer the visitor something that is truly worth their time and money, and also offer something that will make them want to spend money.

4. Conclusion

In conclusion, there are many touchpoints of interaction that affect the way your visitors think and feel about your brand. The impressions your visitors have based on the few hours they spend at your winery or the relationships established with your staff will have an effect on your business. The best practices offered in this chapter demonstrate that there is much to consider when offering wine tourism at your winery. The guidelines offered are a small part of what you need to know to ensure an unforgettable experience at your winery. Keep in mind that tourists are searching for authentic experiences and something as simple as sharing a bottle of wine and hearing some great stories by a person who loves what they do can result in some of the best experiences. However, visitors come with their own cultural standards of quality, and with certain expectations as paying guests. It is important to meet those expectations or find ways to manage them.

Remember that a successful wine tourism business takes careful planning and consistent effort to get it just right. There needs to be a commitment to planning, developing and implementing your wine tourism experience to the highest degree. In order to reap the rewards from wine tourism, every detail of the visitor experience must be mapped out and planned, from the moment your visitors contact you to the moment they leave, and even afterwards. It is important to take the time to plan, to think of the details, to understand how the look and feel of the winery or visitor space affects your guests. Examine every part of the experience: the route, the tour content, the tasting, the wines presented, the professionalism of your staff, and the kind of service and hospitality you provide. Continuously analyze



and audit your experiences and ask yourself if it meets your standards, if you would be willing to pay for such an experience.

Finally, while the tourist landscape may not be as robust as it was pre-coronavirus for some time, it has presented us with new opportunities and a new perspective. We now know that human contact and relationships are incredibly powerful and absolutely essential. We have also seen that the real heroes in our society are not superstars or celebrities but the ordinary folk, the front-line workers. We have been given the opportunity to slow down and reflect on what is most important for us as businesses and individuals. Tourism is about people, it is about connecting with your visitors on a personal level, on a human level and it is also about nurturing the relationships with your front-line workers so they can feel empowered and valued. That is the number one best practice in wine tourism.

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Sustainable Business Models of Wine Tourism to Promote Responsible Consumption

Stylianos Filopoulos

European Society of Association Executives (ESAE)

Abstract

The increasingly health conscious and belief-driven consumer behaviours, the restrictive policies on alcohol and health as well as the importance of sustainable development and the rise of wine tourism, urge wine businesses and wine regions to rethink wine and health and actively promote well-being through innovative wine tourism experiences. This article takes inspiration from experience economy and systems theories to rethink the wine tourism business model. It suggests a wine tourism model where responsible drinking is not seen as a legal obligation but as part of the wine tourism experience offering. It also provides tangible examples on how this innovative approach can be applied to improve visitor experience and create further value for the winery, the visitor, and the local community.

“We do not own wine, neither its culture. We are merely caretakers, passing wine from one generation to the other, and we bear the responsibility to pass it sustainably”

Stylianos Filopoulos

1. Introduction

When designing a product, a service or a transformative experience, people tend to ask why they should buy it, what value it creates, what is its competitive advantage. Wine may address various functional, emotional, life-changing, social impact values and therefore provide multiple answers to these questions. But if we ask why someone should buy wine, we should also ask why someone should not drink, especially for a product that we know, like any other alcoholic beverage, is associated with a number of health and socioeconomic problems, particularly when consumed irresponsibly and abusively.



Wine tourism provides a unique touch point to introduce the visitor directly to the wine culture and to educate them on how to best appreciate wine in sustainable and responsible ways. It provides the opportunity to customise or even individualise offering and increase differentiation and relevance to the visitors' expectation and needs.

Considering the problems related to alcohol abuse when hosting visitors, wineries should not only create an environment to facilitate responsible wine experiences but they should also think, how they can design and offer alternative experiences to accommodate those guests who choose not to drink and/or should not drink, but still want to enjoy wine tourism and the culture associated with wine.

2. Alcohol and Health: Responsible Consumption Patterns

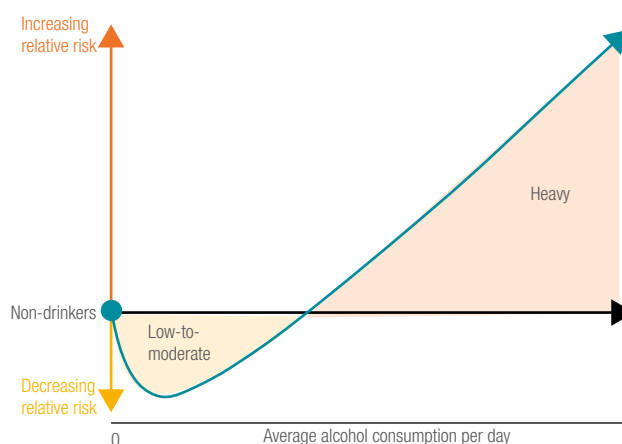
2.1. J-curve; The Shape of Moderation

Wine and health is an equation that includes several factors like who is drinking, how much and how. Therefore, there is no straightforward answer to the oversimplistic question: Is wine healthy or harmful?

With scientific progress, we were able to understand better the relationship between wine and health and the importance of moderate drinking. Today, after decades of research, we know that moderate wine drinkers have a lower total mortality rate than those who abstain or those who drink heavily (Di Castelnuovo, 2006).

The graphic representation of this widely accepted association forms a J-curve (Figure 1) and is expressed as such. So, if the concept of wine in moderation was a shape, it would look like a J-curve.

Figure 1.
J-curve



Source: Wine in Moderation/Wine Information Council (2020).



To understand the curve, we need to understand the concept of relative risk of all-cause mortality. Throughout the developed world, cardiovascular disease is the leading cause of death and accounts for up to 50 % of all deaths. Light to moderate consumption of alcoholic beverages has a beneficial effect on cardiovascular health which may partly compensate the negative effects of certain cancers resulting in a lower risk of death from any possible cause. In the case of wine, bioactive compounds (polyphenols) can provide additional benefits/protective effects (Costanzo, 2011).

However, the risk increases dramatically with each drink above moderation. Thus, while one or two glasses maybe considered good for the health of some individuals, drinking more than what is considered light to moderate will only do more harm, whereby the risk rises with the amount of alcohol consumed.

Not only the amount of alcohol, but also the drinking patterns are important. Drinking small quantities and slowly will provide the liver the necessary time to metabolise alcohol. Drinking with food will delay the absorption of alcohol from the stomach and intestine into the bloodstream and will provide additional time for the liver to metabolise the alcohol. Drinking more than the liver can metabolise has severe short-term and long-term effects on the health of the individual.

Excessive drinking is linked with long-term chronic diseases including hypertension, cardiovascular problems, cirrhosis of the liver, alcohol dependence, various forms of cancer, alcohol-related brain damage and a range of other problems. In addition to health issues resulting from excessive alcohol consumption, there are social consequences e.g. harm from violent behaviour, fatal accidents caused by drunk drivers, etc. (WHO, 2018).

The research behind the J-curve is based on epidemiological analysis of many different populations, but it does not mean that is applicable to every individual. This is the reason why individuals should always seek advice from their family doctor or a specialist about the impact of their drinking patterns on their health¹.

2.2. Responsible Drinking Patterns: Who Should Avoid Drinking and When

A uniform set of internationally applicable guidelines on alcohol consumption does not exist. National governments set low-risk drinking guidelines to minimize potential harm to human health (IARD, 2019).

Drinking guidelines define the maximum number of drinking units per day or per week. Some guidelines include recommendations to drink alcoholic beverages with food, to alternate between alcoholic and non-alcoholic drinks, and 'to pace' drinking. Some national guidelines also describe who should and when to avoid drinking:

- Children and young people.

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1 For more information check (Wine in Moderation/Wine Information Council).



- Women who are pregnant, planning to become pregnant, or breastfeeding.
- Former alcohol-dependent individuals or those with a family history of alcohol dependence.
- Individuals taking medication, those with mental health conditions and those with alcohol-related or other physical conditions that deteriorate or can be affected by alcohol may need to seek professional advice about drinking because of the possible interactions and harmful effects.

When taking part in recreational or occupational activities that require a high level of attention, psychomotor skills, and concentration (e.g., driving) and at the workplace, not drinking is the safest option (WIM, 2020).

To ensure that for certain population groups and in specific situations alcohol is avoided, countries have legislation in place to define the legal BAC (Blood Alcohol Content) level for drivers, the legal drinking age and alcohol at the workplace².

2.3. Responsible Drinking Patterns as Part of a Healthy Lifestyle

The impact of wine on health should not be seen in isolation but in a holistic approach as part of drinking patterns and overall lifestyle. A healthy lifestyle is a combination of different practices and habits. Harvard T.H. Chan School of Public Health conducted a large prospective study (Li, 2020) that identified five key healthy habits towards a healthy/low-risk lifestyle (not only a longer life expectancy but also more years without chronic diseases): 1. Never smoking, 2. Healthy body weight, 3. Regular physical activity, 4. Healthy diet, 5. Moderate alcohol intake.

In addition to these five lifestyle factors, the Mediterranean Diet is celebrated for its multiple health outcomes; Mediterranean Diet (Dinu, 2018), the act of socialising and spending time with friends and family, it is considered by the Mediterranean Diet Pyramid as the basis for a healthy lifestyle (FDM, 2010).

3. A New Social and Institutional Framework for Wine and Sustainable Development

3.1. Alcohol and Health Policies

Wine has accompanied humanity for more than 6000 years and has seen the best and the worst of us. Either as magnifier of our behaviour or as a mirror of our society, wine has been a barometer of our ability to deal with controversy. Societies throughout history have developed social norms and

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2 For more information check (IARD, BAC limits, 2019) and (IARD, Minimum legal age limits, 2020).



enforce regulation to control the negative effects of alcohol abuse. The intensity of these norms and regulations varies overtime, including even a prohibition period in some countries.

Since 2010, when the Global strategy to reduce the harmful use of alcohol was released (WHO, 2010), many countries have developed national policies and others have revised their policies to address the international recommendations. Measures are looking to increase the perception of risk among the population through raising awareness, social norming, social marketing and labelling. Many countries have also created a much stricter regulatory environment for the sale, communication, and consumption of alcoholic beverages by limiting exposure and availability and by restricted commercial communication and pricing policies (including taxes, promotions, minimum prices) (WHO, 2018).

These national policies and strategies are looking also to address voluntary targets like the one defined in the Global Monitoring Framework Non-Communicable Diseases (NCDs) (at least 10 % relative reduction of the harmful use of alcohol by 2025, against a baseline in 2010, as appropriate, within the national context) and at the 2030 Sustainable Development Goals (SDGs) and more specifically, SD Goal number three: “Good Health and Well-Being” target 3.5. These targets increase the pressure for tangible, impactful and measurable action by United Nation (UN) Member States and stakeholders. Since 2017, in parallel to this restrictive environment, increasingly biased and often misleading communication over the impact of alcoholic beverage is observed (Fradera and Stein-Hammer, 2019), challenging sound scientific knowledge.

3.2. Wine Tourism as a Driver for Sustainable Development

It is interesting to observe the traction that wine tourism has gained as driver of sustainable development. In 2016, the UN World Tourism Organisation (UNWTO) organised the 1st UNWTO Global Conference on Wine Tourism in Georgia and published the Georgia Declaration on Wine Tourism (UNWTO, 2016), setting the framework for wine tourism and recognising it as part of Gastronomy and Cultural Tourism and as a key element for tourism destinations, where tourists can experience the culture and lifestyle of destinations while fostering sustainable tourism development. Since then UNWTO has reinforced actions for the sustainable development of wine tourism, stressing the contribution of tourism to the SDG.

3.3. Sustainable Development in the Wider Perspective

The SDGs are the blueprint to achieve a better and more sustainable future for all. The 17 SDGs are interconnected and should not only be seen individually (UN, 2020). A systemic approach is necessary as working on one goal, in one region, could have negative or positive impact on another goal, in the respective region and/or in another area. Likewise, when we approach SDGs and wine, we should not neglect that wine is strongly linked with the cultural and culinary heritage, the environment, the economy and the society of wine regions and countries. The viti-vinicultural sector can have strong impact in the 3Ps of sustainability: People, Planet and Profit (triple bottom line) and should not be seen only through the lens of wine and health.



4. Consumer Trends and Sustainability

The 2018 Edelman Earned Brand study (Edelman, 2018) found that “nearly two-thirds of consumers around the world will buy or boycott a brand solely because of its position on a social or political issue”. The research also shows that belief-driven buying has become a mainstream mindset across all age groups and incomes and that people believe that brands can lead societal change. Most respondents said that when they are about to make a purchase, they would like brands to show more readily what their values and positions on important issues are.

Based on the 2018 Global Consumer Trends (GCT) Report (Wine Intelligence (WI), 2018), consumers are showing increasing interest in healthy and sustainable lifestyles while paying more attention to local societies. The three trends in health included the following:

- “Recharge: Products and services that offer the opportunity to recharge either our bodies, minds or our devices.
- Exclude: Removing or reducing naturally occurring elements, typically food and drink, with the aim of improving health benefits.
- Augment: Adding additional ingredients or dimensions to products and services to ‘boost’ the benefits beyond the original”.

Responsibility was a key theme in the 2020 GCT edition (WI, 2020). The report identified that “compared with 2018 the proportion of those moderating their alcohol consumption has increased, with moderation trends primarily driven by millennials”. As mentioned, the millennials will also tend to be environmentally aware, are more likely to eat vegetarian/vegan food, buy brands that support social causes, and be willing to purchase environmentally safe products. While millennials are indeed driving the trend, the demographic cohort of “baby boomers” aged 55+ is the largest cohort of wine drinkers and is of great interest to the wine value chain as they are “into wine” and they are more active than previous generations that reached this age. Being the parents of millennials, the two groups are in immediate relationship creating a two-way influence.

5. Rethinking the Business Model of Wine Tourism

Wine tourism is part of gastronomic and cultural tourism. Wine tourism value proposition often goes beyond wine’s functional elements (e.g. quality, variety, sensory analysis) and suggests greater value by creating links with elements such as heritage, culture, land, people, gastronomy, conviviality, thoughtful production procedure, affiliation and contribution to the local society, to name but a few on a long list. Many of these elements are strongly linked with the rising consumer needs for sustainability and well-being. As such, a visit to a winery can be an opportunity for the visitor to satisfy his/her emotional and social impact needs (Almqvist, 2009) while experiencing the winery brand equity.



5.1. Experience Economy and the Progress of Economic Value

Wine tourism is not new: it goes back one way or another many decades. It is in recent years though that it has been climbing fast in the wine business agenda. The booming of wine tourism might be explained, if seen through the lens of a greater economic phenomenon, that of the progression of the economic value and the move from services to experiences. Pine and Gilmore (2010), argued that we have entered an experience economy, where experiences supplant services as the predominant economic offering in terms of GDP, employment, and especially actual value. Also, the study of Carter and Gilovich (2010) concluded that buying experiences makes people happier, with a greater sense of well-being, than purchasing mere goods.

According to the Experience Economy theory “every company competes with every other company in the world for the time, attention and money of potential customers. What every company –no matter its offerings– needs to do, then, is create an experience that first gains potential customers’ attention, then gets them to spend time experiencing their offerings and finally causes them to spend their money by buying those offerings” (Pine and Gilmore, 2013).

If we transfer this concept to the world of wine, we may assume that wine is the offering and wine tourism is the experience. Yet this thinking limits the amazing potential of “experiences” as the main offering for the visitors. Let us take the element of taste as an example: we can approach it either as a quality attribute of the product, or as an experience through the act of tasting. The taster, especially when visiting a winery, is indulging in a sensory experience in a unique environment (e.g. historical, rural, convivial, etc.) that addresses a different set of values. The visitor will spend more time and money to indulge in a transformative experience than to just buy a product with a specific sensory profile.

If we look closer at the experience economy theory and invert our thinking, then we can consider the “experience” as the main offering and the product –wine– only as secondary offering (if any at all, as we will see in the case of promoting responsibility). This inversion is a source of a whole new value creation for the winery.

To seize this opportunity a winery should progress from crafting a product to crafting an experience that stays in the heart and sticks to the mind of the guest. Therefore, it is not enough to just to open the cellar doors, it is necessary to transform the winery to an “open stage” and co-create with the guest memorable and aspirational experiences.

5.2. Customized and Authentic Experiences

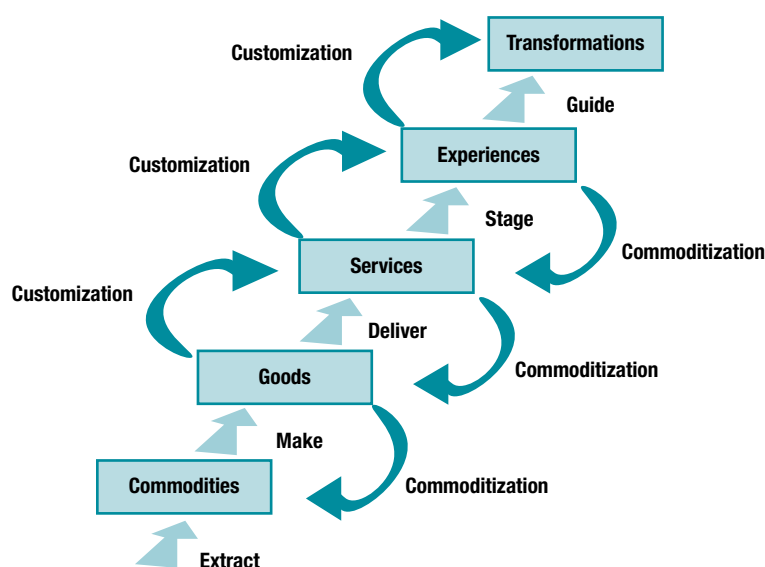
Wine tourism can be one of the best touchpoints for a winery to engage with the customer, but it is also the moment of truth where perception meets reality and can either destroy or highly improve the relationship with the customer.

When designing experiences two important elements should be considered: Customization and authenticity.



Customization is necessary as we progress in the experience economy to differentiate and improve competitive position (Figure 2). The more we progress up this customization ladder, the more relevant the value proposition becomes to the customer.

Figure 2.
The Progression of Economic Value in Full



Source: Pine and Gilmore (2013)

Authenticity for wineries means to stay true to themselves. To do so, they should consider whether and how wine tourism will help them reach their purpose and strategic objectives and how they can sincerely present their vision and values in their offering. They should also assess whether their offering addresses their customer needs and expectations and if depicted in consistent way to address these expectations.

When wine tourism activities are neither consistent with the identity of the winery nor with the expectation of the guest, then they may be considered “fake” not only by the guests but also by the employees. An offering should be consistent and depict the winery values and vision and should not reproduce a successful wine tourism activity of another winery and/or region.

This also is key when introducing sustainability and social responsibility in the design.

5.3. The Need for a Systemic Approach

The wine sector is highly fragmented, involving various type of business and players i.e. different types and sizes of wine producers, a variety of collective and representative bodies, wine communicators and educators, hospitality business and professionals, authorities, etc. In addition, wineries are rooted



in the areas they operate and therefore are very much affected by the respective local and regional community, culture, and market. Wine tourism projects might fail, if they do not fit the local culture or do not have the “buy in” from local stakeholders.

The development of wine tourism activities by the wine sector will gradually involve not only the local community but also players that traditionally belong to the tourism sector/system. This will allow much more interaction and learning, but it may also lead to more problems. These problems cannot be solved by any one player, any more than a complex system can be fully understood from only one perspective. A systemic approach is therefore necessary for the sustainable development of wine tourism as systems thinking helps to explore the inter-relationships (context and connections), perspectives (each player has their own unique perception of the situation) and boundaries (agreeing on scope, scale and what might constitute an improvement) (Allen, 2020).

The experience economy extends the value proposition and the value curve of a winery and offers them the possibility to diversify from the competition. This extension of services opens the way to new co-operation and eventually offerings. From sharing data/information to co-creating and co-offering experiences, the opportunities of cooperation are limitless: visitors’ expectations and behaviour analytics, local festivals, tasting/selling of local products, hosting events with local artists, developing common experience or extend tours to other wineries or farms, transportation services, hosting a local restaurant in the winery to name but a fraction of the possibilities.

6. The Added Value of Offering a Responsible Drinking Experience

For many wine companies actively promote moderation and social responsibility is perceived as endangering their profits and sustainability. In lower quality wine segments, the differentiation is limited, and the main performance indicator is the quantity of wine sold; promoting moderation may appear counterproductive. As we progress upwards on the quality ladder, the shift to “drinking less but better”, may remove the pressure from the volume of sales to the value of sales, but even so, if the wine remains in the centre of the offer, then actively promoting moderation may still appear a difficult task for wine companies that are not fully engaged in sustainable development.

In parallel, the debate on controlling “overconsumption” is often about legal and economic measures (Gladwell, 2010) and not about culture and the ability of society to deal with controversial topics. Seen from that angle, responsible drinking seems like a battleground between NGO’s, governments, and companies.

Businesses often approach responsible drinking in a defensive way; either as a proactive approach against stricter regulation and/or as part of the necessary legal compliance and due diligence. Nonetheless, with the socioeconomic landscape and the consumer trends described above and by looking at wine tourism through the lens of the experience economy, there might be a unique opportunity for social responsibility and sustainable development for the wine business.



Research shows that becoming environmentally friendly lowers costs because, on the one hand, the companies end up reducing the inputs they use and, on the other hand, the process generates additional revenues from better products or enables companies to create new businesses (Nidumolu, 2009). Costs are also lowered, if companies become creative and innovative and see responsible drinking not as threat but as an opportunity.

Wine tourism offers the possibility to progress the economic value and make profits not by selling wine but by charging the access to customised and authentic experiences that address far more needs and expectations than just drinking a glass of wine. In the experience economy, neither the volume nor the value of the wine sold are the key performance criteria. As the main offering is not the wine, but the experience itself, then the attention, time, and money that the guest spend in the winery and its region, and the impact of the experience are the key indicators.

People that actively moderate their drinking or do not drink at all and all those that should avoid drinking for health, social responsibility and legal reasons but want to experience the wider wine culture, create an opportunity for further customization of the wine tourism experience and therefore for further differentiation of the offer. Offering experiences that allow far more people to responsibly enjoy wine and its culture, with or without actually drinking wine, will not only create more value for the guest but will also help everyone in the wine value chain to capture more value.

7. Examples of Good practices for Responsible Wine Tourism Experiences

This last section provides an overview of how a winery can design experiences to facilitate responsible drinking and promote well-being. Considering that wine tourism offer can take various forms from various players, it can involve a limited number of guests or thousands and may take place during specific periods or even all year long, the examples presented are intended to inspire creativity and innovation by introducing responsibility in the wine tourism experience offered by a winery.

Some of these examples build on Wine in Moderation (WIM) Programme good practices (Filopoulos and Frittella, 2019). WIM is the social responsibility programme of the wine sector, providing wine professionals with the information and tools to responsibly present wine, and inspiring consumers to fully enjoy wine and its culture in a healthy, positive and convivial way (WIM, 2020). As of 2017, the WIM association, which centrally coordinates the programme, has scaled up action to promote sustainable wine tourism. The programme's training, implementation and communication tools are publicly available in various languages. Wineries can join WIM, become supporters, and use tools and good practices, and demonstrate their commitment to social responsibility.



7.1. From Regulation to Facilitation

7.1.1. Comply with Legislation

The legislation for the sale and on-premise consumption of alcoholic beverages varies significantly from country to country, but most countries have licencing rules that define who can sell alcohol, when, where and to whom and if you have to obtain a permit or license or to have licensed servers. Almost everywhere, it is forbidden to sell alcoholic beverages to a person under a certain minimum age. Sometimes, the minimum age differs depending on whether you are drinking the alcohol on the premises or buying from a shop. In some countries, the permitted age changes depending on the strength of the drink and may also vary depending on whether the person is accompanied by an adult of legal drinking age, such as a parent or legal guardian. In some countries, serving alcohol to a person who is already intoxicated is an offence and may result in fines, warnings, loss of license or imprisonment. Servers in some countries (e.g., in some USA States) may face legal responsibility, if they serve intoxicating amounts of alcohol to a person that has a car accident and is found to be drunk (“server liability”) (IARD(recorded) and EFRD, 2008).

A wine company should therefore check the licencing laws thoroughly and make sure that staff have been made aware of the laws. Even if not required by law, it is good practice to prevent drunkenness as it can result in many problems. Furthermore, legal compliance is the minimum basis for any effort to promote responsibility and moderation.

7.1.2. Create the Right Environment

The general mood/feeling of the place and of the offering will affect the customers even before their visit and can influence their ongoing behaviour. When a winery receives people, it is important that the guests are feeling welcome and that the host care for their well-being by creating an environment to facilitate responsibility.

The leadership always sets the tone. It is important that the winery publishes a policy, declaring at the highest level their commitment to social responsibility and to maintaining high standards (e.g. refusing entry to people with undesirable behaviour, not serving drivers, pregnant women, etc). Participation in collective initiatives (e.g. “Certified Sustainable Wine of Chile” and/or “Wine in Moderation Supporter”) is a good representation of values, commitment and compliance. Employees, especially those in the front line, are the face of the company and therefore continuous education to raise knowledge and competencies and team meetings to discuss incidents and areas of improvement are highly recommended to remain aligned with the culture and values of the company.

Finally, the commercial communication (both visuals and messages) should be carefully assessed to be aligned with the overall culture as it drastically shapes the atmosphere. In tandem, with the legislation in force, the collective bodies of the wine, beer and spirits sector have established self-regulation codes (e.g. Wine Communication Standards (WCS) (WIM, 2018).



7.1.3. Knowledge and Facilitation

The right atmosphere will inspire visitors and shape a certain behaviour, but to act responsibly, they will also need to have adequate information and facilitation. Below is a list of actions that can prove helpful in informing visitors and facilitating visits:

- Provide useful information on how to prepare when they plan their visit.
- Inform visitors how to appreciate wine responsibly through information material, posters, videos, and messaging when planning the visit and during the guided tour. A well-designed addition of visuals and short storytelling about moderation in the passage and the script respectively of the wine tour, can convey, in a subtle way, the message of conscious enjoyment.
- Facilitate responsibility by adjusting the tasting environment:
 - adding spittoons, encouraging people to spit and teach them how to do so,
 - regulating the quantity/maximum number of wines that a visitor can taste,
 - informing the visitor about the quantity served e.g. by having a small mark on the glass to indicate the quantity,
 - providing water and small snacks during tastings.
- For wineries with restaurants, allow guests to take home any unfinished bottle of wine or reserve for another visit.
- Check ID of participants of tastings and buyers for minimum age.
- Identify and kindly avoid serving people at risk (pregnant women, intoxicated people, etc.).

These are just some examples of actions; the more customised the experience, the more individualised the action can be for the well-being of the guest. In addition, since the visit to a winery neither starts nor ends at the winery gate, the winery should think of ways to integrate messages and facilitate responsibility in the extended experience value curve, thus before and after the actual visit.

7.2. *Actions against Drink-driving*

Most countries have laws about drinking and driving that may vary from 0 (“zero tolerance”) to 0.08 % BAC. Wineries and wine regions are in rural and sometimes remote areas, making them a hard destination to reach. A wine region may involve several wineries and wine tourist sites that can be situated quite far from one another, requiring means of transportation to go from one site to the next. A driving visitor will preferably have to avoid drinking or at least comply with legally established BAC



limits. Because this may act as a barrier for potential visitors, it is important for wine tourism players to consider ways to secure a safe experience for their guests.

Some proposed action may include:

- Providing information on alternative transport (public transport, uber, VIP transportation, tourist operators, etc) and/or offering a transportation service as part of the experience.
- Offering breathalysers to check the BAC level and sensitize the visitor to drink and driving problems and legislation.
- If it is a group of people, ask them to designate a driver that is not drinking and offer a reward for driving the group safely.
- Work with local community and hospitality businesses to prolong the duration of the visit to include an over-night stay (2-days packages, local festivals, extended experience with additional offering etc).

7.3. Accommodate Those Who Choose not to Drink

In parallel to providing responsible wine experiences to wine consumers, it is also important to consider non-wine drinkers. With the increasing demand in wine tourism wineries and wine regions will receive a greater number of visitors of increased diversity. The need to accommodate visitors who choose not to drink will arise and lead them to diversify their offer to experience wine culture in new ways that go further than just tasting the wine or visiting the winery.

Whether it is under-legal age individuals, women who are pregnant or breastfeeding, those who are driving, those who choose not to drink for religious beliefs or those who simply do not like the taste, all visitors should indeed have the possibility to experience the cultural and gastronomical experience of wine. Several activities can be set in place to offer memorable experiences without drinking wine:

- Activities for younger individuals to explore viticulture, terroirs and help them understand agriculture and nature.
- Sensorial analysis without wine.
- Organise parallel activities related to the vines and give an agricultural experience. For example, create co-experiences that involve the guest in the making of the product, e.g. pruning and harvesting experiences, making and bottling wine or other agricultural activities related to the winery and the region.
- Offer non-alcoholic beverages and mocktails (e.g. non-alcoholic wines, grape juice).



- Offer activities linked with their interests, as mentioned above, that are not linked with wine but with the region, their well-being and entertainment.

Today, there is an increasing number of wine businesses that have advanced their offering. Some are offering experiences linked to the emotional value that people may attribute to wine, such as wellness, entertainment, reduction of anxiety, nostalgia, or community feeling/contribution. Activities take the form of spa, yoga classes, horse riding, cooking classes, gourmet/local cuisine, family activities, art events and concerts, to name a few. This list should continuously evolve, offering new ways to experience wine and wine regions, expanding the reach of wine culture and its related attributes.

8. Conclusions

The challenging socioeconomic environment that we are experiencing in combination with bigger waves of change that will be caused by the COVID-19 pandemic, will force the wine value chain to rethink its business model and become agile and resilient.

In this environment, there is a great opportunity for innovation, especially if a winery expands its value proposition from offering a product to offering an experience. By understanding that the value proposition/offering of a winery can go beyond wine consumption and by adapting a closer and dynamic relationship both with their respective wine tourism ecosystem (e.g. local business, regional authorities, tourism players, etc.) and with their customers, a winery can co-create responsible, aspirational, and transformative experiences. This evolution in the value offering will support their own and their respective region's sustainable development as well as the well-being of their customers.

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Vineyard Landscapes and Wine Museums as Wine Tourism Resources

Luis Vicente Elías Pastor

Doctor of Anthropology, La Rioja (Spain)

Abstract

In the origins of wine tourism, the visit to the winery was the most important attraction for visitors. The most famous wineries were visited, and the brand was the main attraction. Subsequently, with the arrival of new resources for wine tourism, the territory began to take centre stage and vineyards also became a destination for travellers to visit.

At the same time, a new concept of heritage enables visitors to get to know other cultural features such as winery neighbourhoods and museums in addition to the wineries as a technical and architectural component. These give us a cultural vision of wine and its place in everyday life, away from sophisticated tables or prescriber ratings. Wine is a staple in traditional society, and it is also an important product in rituals and in many intangible displays that can be understood by visiting Wine Museums.

1. Vineyard Landscapes

In our old articles on wine tourism we used to say that travellers first preference in this type of thematic tourism was the visit to the winery. The next resources that appeared on that list were tasting, acquiring wines or pairing food and wine. The landscape of the vineyard did not appear to whet the appetites of the wine tourists of the late nineties.

In the case of museums, this resource appeared in eighth place and was highly dependent on the areas where the survey was conducted. At present, tourist orientations are different and both vineyard landscapes and a trip to the wine museums are common proposals among people visiting wine regions. The importance of these two resources has led us to describe the reasons for the appearance of these proposals in the world of wine tourism.



In recent times, landscape is considered to be a characteristic of heritage and appears as such in the different legal proposals. The new concept of heritage that encompasses values that are quite different from those considered so far has led to landscape being considered heritage (Elías, 2014a).

In the case of the vineyard landscape, the fact that UNESCO has proposed some wine-growing landscapes as World Heritage Sites has allowed this agricultural landscape to acquire a “dignity” that it did not previously possess. This recognition has given rise to a type of tourism keen to get to know those award-winning wine regions which will be described later.

Regarding the field of “wine culture”, vineyards have begun to be considered the true originators of wine quality. There has been a logical return to vineyards as the origin of wines, since on many occasions the fruit of the vine was not highly enough valued when evaluating the entire production process. The vineyard, therefore, has acquired a great role. This has led to the search for unique vineyards that have different values to the majority of production areas.

This change has given rise to a new viticulture, one which attempts to recover old vineyards and native varieties, and this interest has been transmitted to wine lovers, who are looking for wines from old vineyards and the characteristic varieties of each producing region. In some cases, even from vineyards using traditional agricultural techniques such as those that use horses for ploughing. This has generated a demand, amongst enotourists to get to know those vineyards and to visit them with as much interest as they would tour a centuries-old winery.

This has led many wineries to incorporate a tour of one of their vineyards into their visit program, looking for those that have the most striking characteristics: age, typology, varieties, size, architectural features on the farm and other values offered to the visitor as a resource.

Moreover, the incorporation of vineyard landscapes into the list of visitor-attracting resources renders the territory more receptive and thus the wineries are no longer the exclusive beneficiaries of this type of thematic tourism.

While the incorporation of new resources into wine tourism is taking place, so the ‘wine-culture’ concept is developing. This is defined as the set of cultural expressions that arise around vine and wine which are considered to be heritage values in some cultures, such is the Euro-Mediterranean case. This multidisciplinary look at wine has manifested itself in so many ways that can generate development in the areas in question and wine tourism has its place here, with these new resources that are proposed.

In the case of museums, their appearance in wine culture is not recent. Since the 19th century references have been made to these institutions as training centres for sector professionals of that time, due to the incorporation of new techniques and instruments that were introduced in the last decades of that century, and which were on display in the institutions which ‘were the responsibility of the Oenological Stations’, according to their Royal Foundational Decree (R.D. 25th January 1892).

However, regarding tourism it is believed that, at least in Spain, the incorporation of wine museums into wine tourism had a lot to do with the inauguration of the Vivanco Museum of Wine Culture, in



2004. At present we have located some 70 wine museums in Spain, almost 40 of them are associated within the Spanish Association of Wine Museums¹.

2. Vineyard Landscape as a Resource

It cannot be considered that all wine production areas are classified as tourist resources so, before the product is offered, an exhaustive selection must be made of those that meet the series of characteristics that make them attractive to visitors. This implies preparatory work, and methodology of action, as carried out in the project: 'Atlas del Cultivo Tradicional del Viñedo y de sus Paisajes Singulares' (Atlas of Traditional Vineyard Cultivation and Extraordinary Landscapes) (Elías, 2016).

Let us take the definition of these from the aforementioned work: For us, these "extraordinary vineyard landscapes" are territorial groups that can be delimited with certain ease, in which crop typologies that reflect specific socio-temporal situations are observed and whose visible complementary features are based on specific facts with integrated explanations. These areas, therefore, have a series of characteristics that make them different due to the features they offer and, through study, a certain unity amongst them is observed. These areas that have been defined in many production zones in Spain and America are the ideal territory to understand the diachronic value of vine cultivation and, therefore, the landscape.

Once these landscapes have been located and studied, they can be turned into resources based on their signage and visitor offer. The landscape considered as a component of heritage, despite the private nature of the land itself, has a social and community value. Therefore, we cannot speak of the property of the landscape, and it must be the community that takes advantage of the benefits caused by this resource.

In regions where these landscapes have been located, they have been signposted organizing routes or trails through the vineyard, heritage features such as presses, huts and vineyards and old wineries, among others appreciated by visitors, have been valorised. Certain wineries also offer their clients tours of the vineyards, as well as certain agricultural tasks such as pruning or harvesting, as a complementary activity to their visit to the winery.

The Wine Trails organized by the Association for the Development of La Rioja Alta are an example of this type of action as well as initiatives linked to *los lagares rupestres* (presses hewn in bedrock) that are signposted and can be visited in the town of Labastida in Alava².

This way, vineyard landscapes have come to be considered "cultural landscapes", and this inclusion is not exclusive to extraordinary landscapes that achieve international classification, but to any agricultural landscape with vines that reflects the characteristics of the crop in that particular place.

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1 See the website of the Spanish Association of Wine Museums at <http://www.museosdelvino.es/>.

2 Ver el sitio Web: <https://www.alavaturismo.eus/lagares-rupestres/>.



We will talk about extraordinary landscapes later, but we are referring to everyday landscapes that have a heritage value, without expecting flashy or ostentatious statements.

We believe that the most important thing for the birth and use of resources is that the local population, the owners of the agricultural territory, become aware of the value that these agricultural areas have and relate them to the quality of the product and, in fair compensation, its fruits are priced appropriately. This is probably where the great conflict between quantity and quality appears. Traditional vineyards produce less but of a higher quality, and often the price of the grapes does not justify maintaining those traditional growing systems, with the subsequent disappearance of the unique vineyard landscapes for the sake of greater profitability.

In recent years, the recognition of the value of traditional vineyards and their impact on the appraisals of the wines they produce, and the layouts of their landscape, maintain and guarantee a certain continuity. The interest in wines from “old vineyards” is leading to these traditional crops being maintained, in the face of the advance of mechanized crops, and traditional agricultural practices, such as ploughing with horses and manual grape harvesting are even being recovered.

It is possible to say that, at present, vineyards constitute a new resource for wine tourism, and that in some areas it has reached extraordinary heights due to foreign appraisals. There are many foreign travellers who visit regions with a high landscape value, which in many cases coincide with the assessment of the quality of the wines, such as: Rioja, Priorato or Ribeira Sacra, where the saying: “the best wines come from the best landscapes” is true.

3. Vineyard Landscape as World Heritage Sites

The fact that UNESCO has considered some vine production territories World Heritage Sites has given vineyards a new significance. Within the agricultural areas the international organization values as heritage, there are several dedicated to vines, which are curiously restricted to Europe and, strangely, no Spanish wine-growing territory is included in them.

UNESCO's Eurocentric view in relation to vineyards is obvious. Unique and extraordinary landscapes such as those in Bolivia, Argentina or Brazil, have never been considered by this body focused on European vineyards, which are often alarmingly similar, compared with Bolivia's unique tree vineyards (Figures 1 and 2) or the ‘latadas’ (wooden vine support) in Rio Grande, Brazil.

This worldwide recognition has helped to publicize the value of this agrarian landscape and has benefited the development of wine tourism, and at the same time it has contributed to producing another series of recognitions and appraisals such as the vineyards in the Communities of La Rioja and the Basque Country being considered for BIC (Resource of Cultural Interest) status, or the declaration of the Orotava ‘rastra’ (braided cord method) vineyard on the island of Tenerife in the Canary Islands, BIC (Decree 20/2015)³. There are also several Spanish vineyard landscapes opting to achieve this

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3 Decree 20/2015 (June, 12): *El paisaje Cultural del vino y el viñedo de La Rioja* is declared a site of cultural interest. BOE n.º 163, 9/7/2015.

global award, such as those of Ribeira Sacra, Priorato, La Rioja, the Iberian Vineyard, due to the rock presses of Requena, and the vineyards of La Geria in the Canary Islands (Martínez *et al.*, 2019).

Figure 1.

Vine in a tree. Harvest. Bolivia



Figure 2.

Parral. Bolivia



Source: Luis Vicente Elías Pastor.

This concern for the recognition and protection of vineyard landscapes shows us a certain interest in these values that contrasts with the territorial disasters that continue to be seen in the crops themselves through the destruction of traditional production territories in many of the regions, in areas that we consider “protected”. An example of landscape alteration can be seen in the erection of the high voltage lines in the surroundings of Haro in La Rioja, at the same time that this area was being proposed for the candidacy as a “World Heritage Site”. Examples of this type of impact can be found throughout Spanish wine-growing territory, caused by infrastructure construction, building in agricultural areas or the conversion of agricultural land into urban areas.

But we must recognize that, at present, and in the surveys carried out, the traveller state that they wish to visit the vineyards after seeing the winery, and as a complement to their visit.

This valuation of vineyard landscapes as a resource also has an international scope, since based on UNESCO declarations, a project was created to integrate these recognized areas into a tourist package. For example, the Project “Vitour Landscape. European World Heritage Vineyards”, which was created between 2006 and 2007 as part of the European Interreg III C Program, sought to establish a tourist proposal for these areas of recognized quality, so that they would become high quality tourist destinations, working in a network based on common proposals. At the time of signing, six territories designated as World Heritage Sites joined, in France, Germany, Austria, Hungary, Italy and Portugal (See VADEMÉCUM of European Wine Tourism. Vintur Project)⁴.

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4 see document in: <http://www.culturaydeporte.gob.es/dam/jcr:18c703e4-32f5-42f5-90c0-8b4eea8c5c53/enoturismo-ruta-del-vino-europea.pdf>.



The next step, promoted by France, was the creation of an international group on wine-growing landscapes from the signing of the “*Charte Internationale de Fontevraud. Protection, gestion et valorisation des paysages de la vigne et du vin*”(2003) (Conservation, Management and Valorisation of Landscapes of Wine and Vine), but this project, unfortunately, has been reduced to French territory, where there is still a National Group of Wine-growing Landscapes.

In 2001, UNESCO organized an international meeting of experts on this subject in Tokaj, and their opinions have contributed to evaluating the subsequent declarations of landscapes as world heritage. Therefore, the interest in vineyard landscapes is evident and it has an international endorsement which supports it (World Heritage, 2001)⁵.

It is admirable to see the integration between vineyard landscapes and architecture that is taking place in some vineyard areas of Latin America. The wine-growing area of Mendoza can be given as an example, with the splendid constructions of the architect Eliana Bormida, highly involved in the integration of these wine-making industries. Similar examples can be found in Uruguay and Chile; But the Mendoza wine tourism offer integrates the new winery architecture with vineyard landscapes (Figure 3).

Figura 3.

Salentein Winery. Eliana Bormida. Mendoza



Source: Luis Vicente Elías Pastor.

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5 See document in: <https://whc.unesco.org/archive/2001/whc-01-conf208-inf7e.pdf>.



4. Wine Museums

Wine Museums in the production areas give us a diachronic vision of the cultivation and production systems. They are the meditated, ordered and well-explained cultural warehouse, of the tools, instruments and machines necessary to create this product, which is sought after nowadays by many people. In addition to functional materials, they guard and display intangible features and references, as well as describing social situations, linked to wine culture (Elías, 2014b).

For wine tourists, a Museum is a necessary complement to any winery visit. It offers visitors the background to the techniques and processes observed nowadays in the facilities of the winery in question. Moreover, a Wine Museum is complementary to the enjoyment of the vineyard landscape and its evolution by observing the different machines that have contributed to making the vineyard what it is today. If a vineyard landscape is work, it is work which requires those exhibits on show in the Museums today.

For this reason, in an educational way, a museum offers us the tools used over the years to “build” that landscape; the hoe had its moment in time, and was replaced by the plough, deep ploughing appeared at the time of the phylloxera, before the arrival of tractors. This can also be observed by taking a walk through the traditional vineyards.

Many historical wineries kept and exhibited instruments and machines, generally in disuse, which were shown as decoration but lacked a museum or educational application.

The history of Wine Museums in Spain is relatively recent, apart from those few museums that were created in some Oenological Stations at the end of the 19th century. The first Wine Museum was that of Vilafranca del Penedés, which was inaugurated in 1954, although its collection is much older. Later, others were created, but the opening in 2004 of such an exemplary facility as the Vivanco Museum for the Culture of Wine caused a qualitative change in the wine museography. This museum is a reference point when mentioning the traditional museum types with their exhibits, their permanent collection and their museography that we can describe as “ethnographic”.

Years later, in 2016, *La Cité du Vin* was inaugurated in Bordeaux as a world-class theme center based on audiovisual techniques and interactive products, without reference objects and materials. It is a new museographic conception with world-wide information, and is aimed at an audience that comes to a wine-producing territory and complements the visit to the winery and vineyards with the participation in the activities of the Cité du Vin. Ever since it was conceived, it was proposed as something different to the concept of museum: *Pas un musée, une ‘cité’, un lieu de partage autour des civilisations du vin, mêlant muséographie, restauration, point de vue unique sur la Garonne* “(Not a museum, a “Cité”, a place of sharing around the civilizations of wine, mixing museography, restoration, unique viewpoint overlooking the Garonne)”⁶.

6 *Le Moniteur*, 02/12/2014, consulted on the web on December 7, 2019. <https://www.lemoniteur.fr/article/cite-des-civilisations-du-vin-un-surcoute-compense-par-les-retombees-attendues.1482314>.



A third model is that of the Interpretation Centres. This name is given to cultural places intending to inform about a specific aspect, through the media, with the aim of describing and disseminating an activity, space or cultural expression, which requires prior information for its understanding. In this case, it is halfway between written and visual information and that which is transmitted through objects, but the characteristic of Interpretation Centres, despite having a prior methodology similar to that of museums, is not usually the objects that they exhibit, but the set of information that they provide by other means.

This duality of models, traditional or ethnographic and modern or audiovisual, show us the two types that are sought after by travellers on their wine tours. In both models, vine and wine culture is raised globally with all its possible facets. In some cases, its local character allows travellers to specifically get to know the local values of a certain production area compared to others, such as Bordeaux, which focusses on a more global and universal nature of the civilization of wine.

An important chapter is made up of the non-permanent thematic exhibitions that disclose regional aspects of wine or a specific subject of its elaboration. We remember the magnificent exhibition “Offering and Word” at the Ethnographic Museum of Castile & León in Zamora, or the recent “Douro [DWR]” exhibited at the Cité du Vin in Bordeaux and in Porto.

In recent years, new wine museums are being created and old ones are being renovated. On the website of the Spanish Association of Wine Museums you can see the most important wine museums in Spain, although, as we have said before, many more are not associated, some of them within wineries that show their production methods through their exhibits and collections.

5. Wine Museums and their Contribution to Wine Tourism

The educational value of Wine Museums is related to their conception and their museography. The simple addition of objects without a teaching program only offers a regressive character to the wine-making processes. The example of the exhibition of the old tools in the wineries exclusively provides a regressive vision which, if not explained correctly using museography, confuses visitors.

Museums should provide that diachronic vision but explaining the processes and times to which the exhibits on show are related. In many cases, travellers get a regressive vision of winemaking due to the negligent way the processes which use advanced technology nowadays are explained.

Museums should be the ones to give the historical and diachronic vision and the wineries should explain the modern-day processes with the latest technology, without confusing travellers with a false sense of history that is detrimental to wine culture. These two visions, that of the winery and that of the museum, must be complementary and inclusive. The winery should not explain historical processes nor should the museum show the specific ways of winemaking.



Museums should provide the global aspects of wine culture, both in time and space, and wineries should focus on the unique aspects of each producer. Museums should give the complex image of wine relating it to the rest of the cultural expressions of the territory in which it is located.

Travellers should be shown each winery's specific production processes and museums should integrate the different regional wines with the total culture of the region. Wine, considered as heritage manifests itself in many ways; material and intangible, written and oral, individual and collective, yesterday and today, and the most suitable place for the exhibition of this holistic vision is a museum.

Museums should offer us a collective vision of wine, and the winery the individual aspects of each producer. Museums, therefore, give us a global vision and that is why they are essential for wine tourism, which is a very bran oriented type of tourism, since its destination is linked to the specific brands of wine-making companies.

Another important aspect of wine museums is that they must exercise a dynamic role, within their sphere of influence, in the territory where they are established. Museums, as receivers of visitors, must also be distributors and a catalyst for the area relying on that receptive role. Their complementary activities must be oriented not only towards visitors but also towards the local population.

The success of wine tourism lies in the real and effective participation of the local population in the project and the role of museums should be to train the local people who should participate in this tourism development project.

6. Wine Museums in Latin America

Sometimes we want to forget that some of the first plants taken to America by the European conquerors were vines. And this means that in the middle of the 16th century wine was being made in the so-called Latin America. Viticulture developed rapidly throughout the American continent, but it was only at the end of the 20th century when Europeans became aware of the existence of American wines.

These wines gave rise to a surprising tourist phenomenon as early as the 1920s in countries such as Brazil, with a relatively small winegrowing sector, but whose wine cooperatives already received visitors in their facilities and museums.

The wine museums of Latin America deserve a brief description of their position in the world ranking of this type of facility.

This brief review should begin at the Baja California Wine Museum, in the Guadalupe Valley, in Mexico. As a Wine Museum we believe that it is the only one that exists in that country to which the vines arrived at the beginning of the 16th century. Each of these museums tells us about the historical aspects, and in this case the reference to the missions of the friars who brought viticulture to the area is the axis of their description.



Talking about a museum collection of wine in Brazil may surprise wine aficionados, but in Rio Grande do Sul we can find several collections, among which one stands out, the collection dated in 1875 of more than 1,000 wine-related objects from Italian emigrants who arrived in the area. In Garibaldi (RGdS), the Villa Fitarelli Estate houses an immense collection of objects from that time (Figure 4).

Figure 4.

Fitarelli Collection. Wine Museum. Brazil



Source: Luis Vicente Elías Pastor.

The Villa Michelin collection, in the Vale dos Vinhedos, displays the tools used by the emigrants. The Dal Pizzol Winery also displays different objects from that wine culture brought from Italy in 1875. The Forqueta Wine Cooperative's collection in Caxias do Sul is another example of viticultural museography that has been present in the area for almost a century.

In Uruguay, in the town of Canalones, the country's wine museum is recommended to visitors. In Argentina, the important collection of the Bodega La Rural, in Mendoza, surprises visitors and is admired by specialists. This collection of more than 4,500 artifacts was amassed by Rodolfo Reina Rutini, it is the most important in Latin America and one of the most remarkable in the world. The valuable collection contrasts with the scarce museography, but the visit to the Museum indicates how important the vineyard was to the whole of western Argentina.

To complete your knowledge, in Mendoza itself, you can visit, a mediocre national wine museum, but leaving this wine capital we find the Grafigna museums, in San Juan, or the Cafayate Museum, in Salta. This tour, completed with a visit to the wineries of north-western Argentina and observing its landscapes, will enable you to understand the importance of wine since colonial times.



Wine Museum of Chile can be found at kilometre 26, Viña Santa Cruz, on the I-72 highway which connects the city of Santa Cruz with the town of Lolol, in the Colchagua region, approximately 200 kilometres from the capital city, Santiago. This museum is the result of years of effort by the Cardoen Foundation, which founded it with the purpose of showing wine culture in Chile, thus becoming the first Wine Museum in Chile.

The building that houses this museum comes from an iron structure that dates back to the 19th century, and which in its time housed maintenance warehouse of the Antofagasta –Bolivia Railway. It has an area of 1,600 square metres and presents eight different wine topics, distributed in thematic areas such as: “The History of Wine in The World; Art, The Church and Wine; The History of Wine in Chile; Vine Cultivation; Wine Production; Cork, Barrel and Bottle Manufacture; Wine Services and The Aromas of Wine ”(Figure 5).

Figure 5.
Colchagua Wine Museum. Chile



Source: Luis Vicente Elías Pastor.

We know about and have visited other small museums in other Latin American countries but wish to insist on these which are world-class and are part of wine tourism projects in which the museum is considered an important resource.



7. Conclusions

As with any form of tourism, wine tourism incorporates new resources into its offer, and it is important, for what it implies, that travellers who are fond of wine culture get to know the production areas and value the landscape of the vineyards. It is also important to observe the tremendous alterations that are taking place in these territories and be aware of their impact on the agricultural sector.

The appearance of wine museums in the offer brings a more cultural vision to the world of wine, often reduced to consumption through tasting and pairing. The diachronic vision of the production of this fundamental ingredient of our Mediterranean culture includes it in everyday life and our proper nutrition, separating it from the sophisticated consumption that may appear in the media. Wine has been part of traditional culture, and museums show it to us in the daily lives of its producers.

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Anthropology, Culture and Wine Tourism at the Vendimia National Grape Harvest Festival (Mendoza, Argentina)

Pablo Lacoste

Universidad de Santiago de Chile (Chile)

Alejandro Aruj

Universidad Nacional de Cuyo (Argentina)

Abstract

This chapter examines the National Grape Harvest Festival, formally held in Argentina since 1936. It is an anthropological spectacle, made up of hundreds of interconnected activities, in which thousands of cultural creators and hundreds of thousands of spectators participate. The attraction of this show has a strong impact on tourism. Every year, the province of Mendoza receives three million tourists, attracted mainly by the wine culture (harvest festivals, visits to wineries and wine routes).

The Festival has also become a sounding board for social problems as well as for the wine industry and its identity. It shows certain autonomy from the government, the economic power and the Church, reaching challenging positions, such as the Gay 'Vendimia'/Grape Harvest, the parallel harvests and the grape harvest actions to demand the repeal of unpopular laws. Due to its implications, be they of an artistic, identity, social, political or economic nature, this celebration may possibly be the largest grape harvest festival in the world.

"Buenos Aires created the tango and Mendoza"
Vendimia



1. Presentation

In the capital of Cuyo when the word “Vendimia” is used with a capital ‘V’, it does not merely refer to what the dictionary tells us; (“grape harvest”). In Mendoza, ‘Vendimia’ is synonymous for: The National Grape Harvest Festival, which is, in terms of a strong, economic, social, political and cultural identity, a far-reaching event. It is an anthropological spectacle (Rupolo, 2003), built from the bottom up, with the participation of numerous institutions distributed throughout the entire province of Mendoza. It has an area of 150,000 square kilometres, 1.7 million inhabitants and 140,000 hectares of vineyards, which represents 70 % of Argentina’s vineyards, and more than the entire area of Chile’s vineyards.

‘Vendimia’ is the magnanimous manifestation of wine tourism in Argentina. It is the heart of Mendoza’s call to its visitors, who almost double the population of the province: The province is visited by three million tourists each year, a particularly high figure for a destination that lacks the classic attraction of “sun and beach”. Wine tourism has become one of the most dynamic activities in Mendoza’s economy, and a pillar of its social and cultural life. Hence the relevance of the study into the Grape Harvest, as the centrepiece of all this activity.

Analysing ‘Vendimia’ presents a challenge due to the complexity of anthropological festivals. It is the opposite of the Show Business-type spectacle, designed by production agencies that have become specialized in exploiting mass culture. It is important to differentiate between mass culture and popular culture. According to Colombres (2007), mass culture is based on what is homogeneous and standardized, while at the same time it is practical for commercial campaigns and the brand positioning, since it promotes the culture of consumption and admiration for foreign models. Instead, popular culture reasserts identity, showcases and values ancestral heritage, and generates employment for the local community.

Unlike Show Business, anthropological festivals develop in a multifaceted way, through a creative team, drawn from two universes: one artistic and the other artistic technical, which includes designers, scriptwriters, choreographers, performers, stage architects, set designers, experts in special effects, theatrical lighting designers, sound designers, fireworks specialists, visual artists, actors, musicians, stagehands, running crew, small and large prop designers, detail engineering experts and hundreds of specialists from both areas. ‘Vendimia’ is a multipolar phenomenon: decisions are made in different locations, independent of each other. Unity is maintained due to the common culture from which decision makers draw. There is an underlying *cultural humus* which inspires the many stakeholders involved in this festival, which ensures harmony within great diversity.

It is important to note that ‘Vendimia’ is carried out with all the human resources belonging to a specific place. The people who take part in the setting-up, assembly and execution of the festival are children of the same place. Its creative directors and filmmakers are popular artists, they live and work within the territory.

The multipolar character of such a large and visible festival creates adequate spaces for the questioning of power. Governors, politicians and religious and economic authorities tend to worry about what the Grape Harvest Festival can stage, because they cannot control what happens there; they must accept



the agenda imposed by the artists and legitimize it. Cultural creators feel empowered at this festival and take the opportunity to challenge the masks of power. When the industry falsifies European Denominations of Origin to increase sales, 'Vendimia' responds with the exaltation of identity; When the clergy reaffirm their dogmas, the cultural creators raise the Gay 'Vendimia' Grape Harvest. And if the government passes a pro-pollution mining law, 'Vendimia' stands up to successfully demand the repeal of the bill.

In theory, 'Vendimia' should be a celebration organized by the State but, in reality, it is not. It is a cultural movement that blazes its own trail through time, beyond the changes of governments and administrations. It is true that many of its leaders appear on the state payroll, or in companies that are hired by the State to provide services, but this dependence is merely fictitious. 'Vendimia' is a cultural body made up of thousands of producers, with a dynamic force of their own.

The government of Mendoza has mixed feelings regarding 'Vendimia'. On the one hand it needs it to ensure the flow of tourists to the province but also due to the demands of the social base. On the other hand, it is suspicious of it, because it cannot be controlled. 'Vendimia' has become a kind of fully autonomous cultural entity of its own. It has its own codes, criteria and values. Although it officially depends on the Ministry of Culture 'Vendimia' makes decisions independent of the State, almost with a life of its own. It also operates as a kind of Ministry of Time, with cultural creators who have a deep love of their traditions and cultivate them with passion and dedication year after year, decade by decade and from century to century.

This chapter provides some keys to understanding 'Vendimia'. It is impossible to examine it in all its dimensions, but its genesis and development, its economic, social and cultural impact and, above all, its anthropological value are explained here. The ultimate goal is to understand what 'Vendimia' is and why it represents a unique and remarkable asset in Argentina and even the global wine tourism scene.

2. The National Grape Harvest Festival and Its Rituals

The magnitude and diversity of this anthropological festival has posed a serious challenge to intellectuals. On the one hand, Vilma Rúpolo (2003) conceptually defined it as an "anthropological festival"; whereas Marchionni (2007, 2012) emphasizes the phenomenon as "ephemeral architecture"; Likewise, Vejling (2007) emphasizes its ritual dimension as a space for affirming identity. These works represent significant antecedents to approach the phenomenon. Be that as it may, many fundamental aspects are still require further research.

The celebration climaxes on the night of the Central Event, held at the city's Greek Theatre, on the first Saturday in March. It is a monumental Greek theatre (semi-circular stadium), built in the foothills of the Andes, inaugurated in 1963, exclusively for this festival. It has a capacity for 22,000 spectators—although thousands more people follow it live from the adjacent hills—. The stage covers an area of 4,000 m² on five levels, upon which a 250-ton steel structure is assembled. The handmade Light Boxes cover 1,500 m² to offer successive samples of "light painting". This framework houses the show



which is performed by more than 1,500 artists (actors, dancers, musicians, stagehands, and running crew). To extend availability, the Central Event is repeated on another two nights, Sunday and Monday.

The show consists of a musical piece, with a dramatic script that represents five centuries of wine culture, drawing attention to the different historical subjects and social stakeholders involved: original peoples from the 15th century, Spanish-Creole settlers from the 16th to the 18th century, the soldiers of General San Martín of the early 19th century and European immigrants of the 20th century (especially Spanish and Italians). Each year a different show is put on, to tell the same story¹. Note the colour of the handmade light boxes that make up the “Light Painting” frieze (Figure 1)².

Figura 1.

Central Event of ‘Vendimia’ the National Grape Harvest Festival (Mendoza, Argentina)



Fuente: Alejandro Aruj collection.

The Central Event is merely the tip of the iceberg. It is the culmination of a long process, which starts in the smallest and most isolated towns in the province of Mendoza, some of them 400 km from the capital, where the local festivities in each of the districts of the province begin four months previously. Once the ten or fifteen district festivals of each of the 18 municipalities have been held, it is the turn of the departmental festivals; These have their parades complete with floats and their central event, with hundreds of dancers and actors on stage, and audiences of up to 30,000 people each.

Therefore, the province of Mendoza holds hundreds of grape harvest celebrations every year, on a pyramidal scale, in crescendo, from the smallest districts of the periphery, culminating in the Vía Blanca, the Carousel and the Central Event. The ‘Vendimia’ calendar thus runs from December to

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1 Video del Acto Central completo. El espectáculo propiamente tal comienza en el minuto 30'; <https://www.youtube.com/watch?v=fcnm6FaUgrY>.

2 Video con imágenes de estas celebraciones en las décadas desde 1950 hasta la actualidad: <https://www.youtube.com/watch?v=f2uIN7ZVXF4>.



March each year, with multiple shows distributed throughout the province. Each little town, no matter how small, boasts its own festival, in which its cultural creators proudly exhibit their wines and typical products. The festive atmosphere is common to them all, the intention being to showcase wine culture, the role of local artists and the same traditional song unifying all these festivals in a single celebration.

Along with the sequence of shows, 'Vendimia' also gives rise to economic and political events. On the final day, together with the Carousel and the Central Event, official events are held in which the authorities of the national government meet with the captains of the wine industry. This is a stellar moment in which, for one day a year, the wine industry has a seat in the national power bloc. It is the moment to carry out diagnoses and to agree on public policies. Mendoza places itself in the showcase of national power, to be listened to. This is the time for major announcements or great frustrations.

3. Historical Tour of the Festival: Background and Evolution

The grape harvest celebrations in Mendoza began in the colonial period, with a significant role for Afro-Cuyan slaves. They made up 20 % of Cuyo's population in the 18th century, and stood out due to the contribution of their specialized trades and services to wine production. Among the African diaspora there were prominent potters, carpenters, blacksmiths, winegrowers, coppersmiths, boilermakers, pulpers, saddlers, muleteers and wagon drivers, among other trades. The diversification of Cuyo's vinicultural heritage began precisely through the work of a winegrower belonging to the African diaspora (Lacoste, 2016). Along with their contribution to wine production, Afro-Cuyans contributed, with their music and joy, to the grape harvest celebrations. Its traditional 'candombes' and 'fandangos' brought notes of colour to the end-of-harvest festivities. Little by little the tradition of celebrating the grape harvest in a setting of festivities, music and dance was fashioned in Mendoza.

At the beginning of the 20th century, there was an opportunity for convergence between the wine industry and art. The Mendoza bourgeoisie summoned local artists to put on a show in a huge event organized by the National Wine Centre (CVN), on July 9, 1909. The objective of the CVN was to attract the attention of the national power bloc, and it did so. Journalists from all over the country came to cover the event that managed to attract 10,000 people in a city of barely 38,000 inhabitants. Most of those mobilized were peasants from the inland departments of the province of Mendoza, who came to see the city and attend a massive event around the mother industry of the province. The show put on by local artists for the crowd was complemented by the presence of the ladies of Mendoza who paraded in their elegant horse-drawn carriages to take the petition to Government House (Lacoste, 2006).

The 1909 demonstration paved the way for the future Grape Harvest Festival: the bourgeoisie lost their fear of the mass mobilization of peasants in the streets of Mendoza. In addition, they valued the artists for their ability to offer attractive and convincing shows, despite not having all the necessary means to do so. Finally, they understood that these events enabled them to increase their visibility and to make their voice heard in the national power bloc. With thousands of peasants mobilized around viticulture, Buenos Aires could not ignore the claims of the industry.



4. 'Vendimia' as a Place for Art and Identity

In its early years, 'Vendimia' relied on improvisation. The floats were assembled according to trial-and-error-based intuition. The large troupes of dancers were made up of saleswomen from the shops on Las Heras Street. The sets, lighting and sound were set up with the support of available electricians, carpenters and skilled workers. These resources were linked to the masters of the dramatic arts from the Criollo Circus tradition. The vital contribution of the National University of Cuyo, was added to this in 1939, particularly the Academy of Fine Arts, the Academy of Dance and the Academy of Scenic Art. Plastic arts were cultivated and set designers, technicians, designers, actors, dancers, choreographers, art directors and stage directors were trained there, and contributed to strengthening 'Vendimia'. The strategic alliance between these entities was immediate; in fact, in a certain way, 'Vendimia' became the application department of those Academies, which were later grouped together in the Faculty of Art and Design. With the contribution of the University, 'Vendimia' gradually gained in specialization and professionalism.

Regarding the performing arts, 'Vendimia' has been the great cultural scene of western Argentina, over the last 85 years, balancing, at least partially, the hegemony that Buenos Aires exercises from the east. Indeed, the nation's capital has traditionally represented the main pole of artistic reference in Argentina, with the leadership of its networks of cinemas, theatres, and radio and television stations. With the emergence of TV, this trend deepened even further. Talent from all over the country was forced to leave their places of origin to settle in Buenos Aires to pursue a career, given the decline affecting areas further inland. The conditions were thus ripe for a provincial rebellion that would question the cultural hegemony of the capital and thus reverse the situation.

While Buenos Aires asserted its control over the national art scene in eastern Argentina, in western Argentina, Mendoza led a cultural rebellion through 'Vendimia'. It was headed up by a group of artists and intellectuals, gathered in the Media Luna, a large space located next to the Plaza Fundacional in Mendoza. It was there that a far-reaching cultural change took place that was soon to be felt in 'Vendimia'.

5. Amongst Muleteers and Poets. Media Luna: the Crucible of 'Vendimia's' Identity

Media Luna was a large area located to the east of Mendoza's 'Plaza Fundacional' Square. Between the seventeenth and nineteenth centuries it was the headquarters of the terminal for drovers and muleteers, who used to meet there to transfer cargo for their bi-oceanic voyages between the Atlantic and the Pacific. That was where the 'fogones' (meat roasts) would be held, accompanied by *mates* infusions, guitars and wines. The place buzzed with the news of the entire Southern Cone of America because it was, precisely, the main dry port in the region (De Marinis, 2008). By the middle of the 20th century, the new means of transport had already replaced horse and cart transport, but the tradition of taverns as places for social gatherings remained intact (Bustelo, 1996).



It was around 1930, among the muleteers and drovers' houses of Media Luna, that two humble children grew up to become internationally renowned artists: The writer Armando Tejada Gómez and the musician Oscar Matus (Bustelo, 1996 p. 132). Both creators contributed to generating a point of reference there for the artists and intellectuals of the region, in which other figures of the intellectual and arts scene participated. The direction of performing arts production in Latin America was debated in these meetings. And, little by little, they began to agree on some ideas that would later serve as an inspiration for the cultural and artistic renewal of Latin America.

The taverns of Media Luna were a kind of cultural vortex through which Mendoza was able to move back and forth in time, a Ministry of Time so to speak. It was there that the twentieth century intellectuals were nourished with the stories of the muleteers and drovers of the seventeenth and eighteenth centuries and incorporated their myths and legends into their artistic and intellectual creations. In those taverns the vine-and-wine culture was discussed from the perspective of identity. Industrialists were questioned because, when designing their labels to market their wines, instead of proudly highlighting the place of local origin, they tried to deceive the consumer by using famous European wine names, such as Champagne, Burgundy, Porto, Jerez, or Médoc. The taverns of Media Luna vividly questioned this culture of counterfeiting and raised the banners of identity. Benito Marianetti (1965) expressed it in his essays, and the performing arts creators in the grape harvest festivities.

The ideas of the members of Media Luna were reflected in the *Manifiesto del Nuevo Cancionero* (*Manifesto of the New Songbook*) (1963). In Mendoza, the cultural creators associated with 'Vendimia' relied on the Manifesto to completely revamp the ways of thinking and holding the festival. The artists, set designers, designers, technicians, dancers, playwrights, stage directors and grape harvest stakeholders were naturally referred to in the Manifesto, which enabled us to have a shared cultural matrix that facilitated the overall operation of 'Vendimia'.

6. Grape Harvests vs. Show Business

To understand 'Vendimia' it is necessary to differentiate it from other shows of an equivalent size, but within the framework of Show Business philosophy. These shows are essentially commercial in nature, geared towards mass culture, and are built from the top down. A production company is hired in London; it draws up a list of international artists and gets them together; they arrive in Argentina, Chile or some other country and perform in a stadium to a massive audience. At the end, they collect their fee and return to their country of origin. Their act is the same the whole world over and conforms to the standards of the cultural industry and mass culture. The technical side (stage, light, sound, special effects) is also carried out by the technical crews belonging to each international artist.

'Vendimia' is quite the opposite; instead of being run top down, it is done from the bottom up. The stage is not for an international star of the cultural industry, but for local cultural creators. The presentation is not a closed formula, the same for everyone, but it is a unique work, which represents the culture and identity of the place. The *mise-en-scène* brings local myths and legends, collective creations and ancestral heritage front and centre.



The destination of the funds is also the opposite. Instead of paying the fee for the international star and Argentinian money escaping to the core countries, here the cash is distributed among local artists. In the case of 'Vendimia', the thousand artists performing in the Central Event are paid one thousand dollars each (US\$ 600). That money helps boost local economies, as does the income received by the 500 technicians and craftspeople who provide services behind the scenes. Furthermore, all the contracting companies for the technical side (set design, light, sound) are local SMEs. They are paid large sums for their work: US\$ 200,000 for a departmental festival; US\$ 1,000,000 for the national fiesta. This way, local SMEs secure relatively stable income every year, allowing them to reinvest and stay at the forefront of technological innovations.

The positive externalities of 'Vendimia' also reach the departments. The constant demand for dance groups, both for departmental and national festivals, are a stimulus to create and sustain dance academies. All the communes of Mendoza have their respective academies to develop the different disciplines: classical, folklore, tango and contemporary. Thousands of young people bring life to these spaces where values are incorporated, art is cultivated, and social ties are established. The ongoing operation of these academies ensures that the departments have well trained and specialized dance troupes available to take part in the grape harvest festivities.

The same happens in the university environment, especially at the National University of Cuyo Faculty of Arts and the Academies of Dramatic Arts, which came into being in 1939. Since then, these schools have strengthened ties with 'Vendimia', and have nourished it with a constant supply of artists to take part in the festivities. The grape harvest stages have contributed to providing both professors and graduates of this Faculty with a space for them to develop professionally. In a way, thanks to 'Vendimia', the National University of Cuyo has the oldest and one of the most dynamic Faculties of Arts in the Argentine Republic.

7. Time for Integration: The Gay 'Vendimia'

The inclusive attitude and the permanent will to integrate others have also been amongst the driving passions of 'Vendimia'. This has become apparent in the decisions that led to ensuring spaces for participation and affirmation of identity for the most diverse communities that live in Mendoza, from foreigners to sexual minorities. It is within this framework, that the Gay 'Vendimia' emerged. It includes a performance in a closed venue, with a capacity of up to 3,000 people, where an international show with a considerable media impact is put on (Silva, 2017).

The incorporation of sexual minorities within 'Vendimia' is part of a larger process, begun much earlier, with the integration of other smaller groups, particularly immigrants. Foreign communities have traditionally held places of honour in 'Vendimia'. Delegations of Italians and Spaniards became visible from the first festivities held in the 1930s and 1940s. Later, a similar space was opened to the communities of Peruvians and Bolivians. These aroused great public attention by parading with the typical costumes known worldwide in the Oruro Carnival celebrations.



The genesis of the Gay 'Vendimia' arrived in the late 1980s as an unofficial ritual which took place behind the scenes. After the dress rehearsal, the night before the Central Event, the artists and dancers would get together at the entrance to the Greek Theatre, next to a huge pepper tree, to perform their own rituals. In this context of joy and celebration, the first experiences of choosing Miss Chuchi, forerunner of the "gay queen" of the 'Vendimia', used to take place. Later, the group would move to the house of one of the artists, and the celebration continued with a party and dance in the patio. And that is how the so-called "Fiesta del Patio", which was to become a tradition, came into being. About thirty artists and dancers participated in these clandestine ceremonies. From the underground world, these artists linked to homosexuality, secularly marginalized and persecuted, dared to insist on the right to sexual diversity.

In the 1990s the "'Vendimia' Patio" went from strength to strength, always organized by artists and dancers. At the same time gay-friendly discos, which welcomed the LGBT community, began to emerge. This group felt safe in those dance venues and was present to assert their identity and their rights. In 1995, within the framework of this process of growing tolerance towards sexual minorities, the Queen nightclub announced the future election of the "Gay 'Vendimia' Queen", elected for the first time in 1996. The name of the first award-winning sovereign is still remembered with the title: Ana Laura "Turca" Nicoletti, who went on to become a symbol of her community.

The "Gay 'Vendimia'" grew over the following years, creating a show with a script, dance troupes and choreography, all inspired in the Central Event of the 'Vendimia', but on a smaller scale, adapted to the dimensions of a closed space and for a limited audience of 200 people. "The content was more transgressive and avant-garde, with a script which was more open and focused on gender issues"³.

An important step for the LGBT community was the visibility and official recognition of the Gay 'Vendimia'. The organizers set out to "bring it out of the closet", in the sense of making it public, as a means of legitimizing sexual minorities. To advance in this direction, the State committed to sending official representatives, as was already the case with the other 'Vendimia' activities. The authorities agreed and, as of 2003, Gay 'Vendimia' was added to the official calendar of celebrations and promoted throughout the country by the government of Mendoza.

Over the years, Mendoza's Gay 'Vendimia' has become one of the largest events for the homosexual community in the world. It includes the election of queens and a high-level international show. In a way, the Gay 'Vendimia' has developed as a spin-off of the National Grape Harvest Festival, originally a secondary branch, which has grown has to acquire a momentum of its own.

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3 Reference: Mariano Morales, director of artistic activities of the Province of Mendoza.



8. The Cast: The Stars of the Festival

'Vendimia' is not the industry's festival or an official State celebration. Both stakeholders (the vinicultural bourgeoisie and the State) participate in these celebrations, but as supporting players, and in close coordination with the two stars, the "Vendimia Tribe" and the social base of farm labourers and winegrowers. These four stakeholders are pillars that sustain this celebration and ensure its identity and continuity over time. They have agreed on the "Golden Rule of the Vendimia", a tacit agreement, built over the years, by which the role of each one is clearly established within the general celebration.

Firstly, the role of the industry is relevant, but not leading. Wine companies (large and medium-sized) contribute to the visibility and outreach of the festival, with their logistic support, to organize complementary celebrations for public and private authorities. And with the support of their facilities to enable wine tourism along the wine routes including winery visits; Performances of classical music, jazz, tango, and other art forms in winery facilities are good examples, not to mention the contributions in mass media promotion and press conferences amongst others.

Secondly, the State participates at various administrative levels. In the 18 municipalities that make up the province of Mendoza, the Directorate of Culture and Tourism has its main activity for the whole year at 'Vendimia'. A large part of its economic, social and political resources is invested there. For its part, the provincial government also provides substantial support to the festival, both institutional and financial. More than US\$ 10 million are invested in the closing week, when the float parades and Central Event are held. The investment in activities carried out over the previous six months, throughout all departments, is also added to this. From a fiscal point of view, this investment is justified because the income generated by tourism multiplies the amount invested by six.

Thirdly, the community of winegrowers, farm labourers and lovers of wine and the 'Vendimia' culture constitute the audience that passionately attends district and departmental festivals first, and central celebrations later. This tradition began in 1909, and their participation is repeated, year after year, to see the Carousel and the Vía Blanca of the Queens.

In fourth place, the so-called "Vendimia Tribe", made up of a heterogeneous and colourful group of artists, dancers, technicians and producers who dedicate a large part of their lives to this festival. They have learned the trade from their parents and grandparents, and they pass it on to their children. For them, 'Vendimia' is the main source of work for the whole year, while feeding the mainstream of their social networks and their personal lives. The festival is held by the "Vendimia Tribe", within an artistically independent space. They operate as if they were a university or some other autonomous body, capable of making their own artistic decisions regarding the organization of the festival.

Around the 'Vendimia Tribe', both the State and Industry operate in a supportive role. Naturally, there are often conflicts and differences of opinion amongst the more conservative outlook of the Industry—and sometimes, the State—and the more avant-garde approach of the artists of the 'Vendimia Tribe'. Thus, negotiations take place that end in transactions and agreements to ensure the continuity of the festival, regardless of the differences. This ensures a certain balance between innovation and tradition, typical to anthropological festivals.



9. Conclusions

The 'Vendimia' National Grape Harvest Festival, traditionally held in Mendoza, is an anthropological celebration. It is not a product created by the industry, from the top down, but has been built from the bottom up, with the help of various social stakeholders, mainly cultural creators. Its origins date back to the pre-industrial period, when wine culture depended on labourers, winegrowers, storekeepers, muleteers and cart drivers. They generated a culture of appreciation for wine and associated know-how, which included the world of taverns and guitars.

The construction process surrounding 'Vendimia' has been long and slow, with a broad social base as its foundation. In addition, this festival has been nourished by the events that had an impact on the economic, political, social and cultural life of its people, including some moments of crisis, such as the 1909 Trade Treaty and the start of television broadcasts in 1951, in addition to the Cuban Revolution of 1959 and the recovery of democracy in Argentina in 1983. Before each historical change, Mendoza had a special form of response, often mediated through 'Vendimia'.

The continuity of this festival, and the passionate dedication of artists, technicians and producers alike, created the conditions for the appearance of the "Vendimia Tribe", a group that dedicates its life to this celebration, to preserve its rituals and to renew the way to express them. This entity has achieved recognition from the State to guarantee its artistic autonomy, which places it centre stage. In parallel, the industry contributes with the improvement of the tourist circuits, visits to wineries and wine routes, investing in art to ensure that proposals such as tango and classical music line the wine roads.

The industry's respectful attitude towards 'Vendimia' is also shared by the government, which interferes as little as possible. The artists have earned their autonomy to celebrate 'Vendimia' and ensure their anthropological identity and nature. The ancient city of Rome was said to have its history written down through its monuments. Similarly, Mendoza, the largest wine-producing province in Latin America, tells its story through the National Grape Harvest Festival; 'Vendimia'.

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The Chair in Wine Tourism

Innovative Collaboration between Education, Research and Practice

Coralie Haller

Université de Strasbourg (France)

Abstract

This chapter presents an innovative collaboration based on education, research and corporate partnerships to value and promote wine tourism at a national and international level. It takes the unique and specific case of the creation and development of the Chair in Wine Tourism at EM Strasbourg Business School, University of Strasbourg, in France. The objective is to encourage universities, academics and practitioners to collaboratively work in developing research projects, training programs and strategic best practices around wine tourism. More specifically, it highlights the importance for universities to develop training programs and academics to align their research projects related to the needs of wine tourism industry, and for practitioners to financially support research and education in wine tourism. This will contribute to national and international recognition of wine tourism as an economic sector as such.

1. Introduction

There is a continuous debate around the existing gap between academia and practitioners. Studies show that this gap can even be large enough to feel that bridging is impossible (Kieser & Leiner, 2012). Any attempts to transfer scientific results into practice get '*lost in translation*' and '*before translation*' (Shapiro *et al.*, 2007, p. 249) meaning that scientific results are unconnectable to and therefore untranslatable for practice (Kieser & Leiner, 2009). Nonetheless, there are also counter-illustrations of studies where researchers, in collaboration with practitioners, have generated knowledge that is both socially useful and academically rigorous (Hodgkinson and Rousseau, 2009). The role and place of the researcher is under question as field research seems to be more occupied with considerations of ranking than to interact with practitioners (Kieser & Leiner, 2012) and production of actionable knowledge. A chair can be seen as a possible collaboration possibility between researchers and



practitioners. The aim of a chair is to help researcher together with practitioners to progress through the management of a common scientific project.

For the purpose of this chapter, we focus on wine tourism in France. Atout France, the French national tourism promotion agency, is working on structuring wine tourism into a genuine economic sector. A National Council in Wine Tourism, chair by the former minister of tourism, Hervé Novelli, was created in 2009 to bring together at the national level all the stakeholders involved in wine tourism. The first national forum in wine tourism took place in November 2018 followed by regional forum in Champagne and Alsace in 2019. These led to the writing of the “white book” and the creation of a national label “Vignobles et Découvertes” positioned as a collective brand encouraging global wine tourism offer (accommodation, catering, discovery and cultural activities, etc.). At the same time, collaborations between academics and practitioners have emerged with the creation in 2017, and development, of the Chair in “Wine and Tourism” at EM Strasbourg Business School, University of Strasbourg testify to the willingness of wine and tourism industries to think strategically and to recruit talents dedicated to wine tourism. This chapters aims provide best practices developed through this innovative collaboration.

2. Wine Tourism as an Economic Sector as Such

2.1. Contributions of Wine Tourism to Wine Destinations do not Need to be Proven

The World Tourism Organization defines tourism as “*tourists travelling and staying away from their usual environment for more than one consecutive night, whether for leisure, work or any other reason*” (UNWTO, 1995, p.10). This broad definition of tourism thus includes different types of tourism ranging from wine tourism, culinary tourism, remembrance tourism and medical tourism. Although there are many different types of tourism, wine tourism, also known as “enotourism” or “vinitourisme” stands out and appears to be primarily attractive to people with an interest in wine (Hall *et al.*, 2000). It is indeed considered a niche tourism activity, including other more encompassing niche markets, such as agricultural tourism, ecotourism, sustainable tourism and gastronomy or culinary tourism. Thus, tourism can be an interesting development lever for the wine industry, which is then highlighted by and for the development of tourist activity.

In a context where the world tourism market reached \$ 302 billion in revenues in 2017, with growth projections reaching \$ 423 billion by 2023 (Zion, 2018), wine tourism appears to be a growing activity that contributes to the economic development of wine-producing regions. Moreover, with wine regions documented in more than 70 different countries (MacNeil, 2015) and thousands of wineries offering their own distinctive portfolio of wines and wine tourism activities, contributions of wine tourism to wine regions and destinations do not need to be proven (Haller *et al.*, 2020a). Wine tourism goes beyond cellar door activities and encompasses services related to accommodation in the heart of vineyards, catering, transport etc. Wine tourists can, for example, create their own wine, take a Segway tour through the vineyard, learn about food and wine pairing or take part in a Qigong session in the vineyard (Haller *et al.*, 2020b).



2.2. Wine Tourism from a French Perspective

More specifically, in France, there are no fewer than 10,000 wine tourism cellars and 31 wine-related thematic sites/museums, which welcomed more than 10 million wine tourists in 2016 (Atout France, 2017). The sector's activity has been growing steadily for a decade. Wine tourists spend an average of 1,256 euros for a wine tourism trip, including an activity related to wine and the discovery of vineyards, including 240 euros of average expenditure related to the purchase of wine on site. The overall expenditure of wine tourists in France in 2016 is thus estimated at 5.2 billion euros. A wine tourist is defined as someone who spent at least one night in the vineyards for a leisurely holiday away from his/her usual environment and who had discovered wine and/or wine-related activities (wine tasting, visits to cellars, museums, vineyards, wine routes, wine villages...). 18 % of French wine tourists visit the Bordeaux region at first, 17.2 % of them the Champagne region and the Alsace region come third attracting 16.9 % of them (Atout France, 2017). 42 % of wine tourists come from abroad and this clientele has grown by more than 40 % since 2009, compared with more than 29 % for French wine tourists. Belgian and British wine tourists are the main supporters of wine tourism in France (nearly half of international visitors), but new customers from more distant markets, particularly Asian, are showing a growing interest in this activity.

With these figures, the stakes involved in wine tourism are high, both to support the increase in the number of visitors to wine growing regions and the sale of wines. There is therefore room for progress in France. In this context, the state considers wine tourism as a centre of excellence for French tourism that needs to be developed in priority. The aim is to become the world leader in this sector (Atout France, 2017). The objectives are to improve the reputation of vineyards, their attractiveness as destinations and optimize the sale of French wines. The main distinctive advantage of France lies in its diversity of territories and tourist attractions, the art of living and cultural heritage, and the quality of its wines. This allow wine tourists to enjoy "*a unique experience*" in exceptional territories (Atout France, 2017). The French vineyard is the bearer of images and notoriety for France as an international destination, which is expressed by the perception of a certain French art of living, a distinctive factor of foreign wine tourism models.

2.3. Wine Tourism a Multifaceted Academic Research Topic

Wine tourism is one of the most widely researched wine business topics from an academic perspective (Haller, *et al.*, 2020a) and is considered, by the international academic community, as a research topic at stake (Bonn, Cho, & Um, 2018), resulting in more than 200.000 publications on the subject in Google Scholar in 2020. Indeed, researchers explore wine tourism from different perspectives (Sigala & Robinson, 2019; Vo Thanh & Kirova, 2018) including wine stakeholders in the wine tourism industry (Hojman & Hunter-Jones, 2012), wine tourists and wine customers' behaviors and experiences (Thach & Charters, 2016;) and wine destination strategy (Bruwer & Lesschaeve, 2012; Ben Tahar *et al.*, 2018). However, no study has specifically investigated the importance of collaboration between academics and practitioners in order to value and promote wine tourism. Our objective is thus to contribute to this body of knowledge by exploring possible collaborations through the specific case study of the Chair in Wine Tourism at EM Strasbourg Business School, University of Strasbourg.



3. Evolution of Wine Tourism - Models and Drivers

3.1. *An Innovative Ecosystem*

If there is a general agreement that wine tourism can be a tool for communication and promotion of wine and territories linking culture, gastronomy and heritage, the difficulty lies in the collaboration between the different players involved in the process. In fact, developing a wine tourism offer implies the involvement and interaction of stakeholders like public or private actors, institutions local authorities, winegrowing structures, tourist structures, local authorities, local authorities and, also, the inhabitants (Goncalves *et al.*, 2020). As wine tourism covers two distinct and yet complementary economic sectors (wine and the tourism sectors) its success is largely based on the structuring of supply, through institutional involvement, cooperation between players and the management of a pool of resources and skills (Hojman & Hunter-Jones 2012). As practitioners are constantly faced with strategic dilemmas that leads them to question new approaches and new developments, a collaboration between researchers and practitioners could enhance innovation and strategic expertise in wine tourism.

This implies the union of diverse people and interests to accomplish a common goal through interaction, exchange of information and coordination of activities (Jassawalla & Sashittal, 1998). This collaboration could even go beyond simple interaction, exchange and coordination among players, as it involves a same strategic perspective and progress. Thus, it can be assimilated to an ecosystem in which heterogeneous actors are united to share the same strategic destiny on a principle of co-evolution (Pierce, 2009). They are organized, in the long term, around a collective interest rather than around the short-term personal benefits. More specifically, practitioners develop cooperation with researchers to create collective, sustainable and reactive expertise to deal with the changing environment. An open, transversal and sustainable ecosystem could then be created with players capable of collectively enhancing the value of wine tourism. This would then be a lever of innovation to ensure sustainable performance for all the stakeholders in the wine tourism sector.

3.2. *Researcher is Developing an Entrepreneurial Mindset of a Network Builder*

It is then worth questioning the researcher implication with the field as academic research seems to be more concerned with ranking considerations than with interaction with practitioners (Kieser & Leiner, 2012) and the production of exploitable knowledge. An interesting perspective could be to consider the researcher as a network builder, able to translate research productions for different purposes. The translation theory, also known as the actor-network theory (ANT) Callon (1986), refers to the process of network building that takes place through translation. It is the mechanism by which, the network builder connects people, distributes or inverts roles and ensures faithful alliance in specific innovative situations (Akrich *et al.*, 2002). We can indeed refer to the method proposed by Callon (1986) to “translate” the specific context of the Chair in Wine and Tourism. The translation between the different elements can be done by relying on human translators, like the researcher, but also on non-human translators, like the Chair, able to make a link, i.e. by working to decompartmentalize the



different players. The translation occurs not only because of the will of researchers and practitioners to collaborate but also due to the development and creation of an administrative structure, the Chair, to organize collaborations and allow financial grants to be given. Thus, we retain that the researcher is a network actor or player who is structured by the Chair.

Moreover, as the researcher demonstrate a high level of expertise in a field of study in regards to their scientific and teaching activities, they build on this expertise to progressively get other researchers and practitioners on board and obtain their commitment to “co-construct” future projects together. This approach can be assimilated to an effectual entrepreneurship approach (Sarasvathy, 2001). Thus, to develop a network of strategic partners, effectual entrepreneurs build on their expertise and assemble a patchwork of different stakeholders. This approach is in line with the ANT as they state that the actor or player at the origin of an innovation must “enlist” or “engage” a series of key players. For Akrich *et al.*, (2002: 215-219), building a network of legitimate “spokespersons” is sometimes necessary to get people into the innovation.

4. The Innovative Collaboration of the Chair in Wine and Tourism

4.1. What is a Corporate Chair?

A Chair is a partnership scheme that aims to foster cooperation between companies or organizations and a university on management issues. In France, Chairs are governed by the law on patronage of 1st August 2003 (LégitFrance, 2003) which encourages companies to make donations due to tax benefits. This law mainly insists on the financial aspects without providing a clear definition of such a partnership. In the January 6, 1989 decree, patronage is defined as “*the material support given, without direct counterpart on the part of the beneficiary, to a work or a person for the exercise of activities of general interest*”. In this perspective, companies or organizations accept to finance research projects for the good of the community and the chair is therefore required to disseminate results to the society.

The “Wine and Tourism” Chair is an innovative partnership that promotes cooperation between different organizations/companies from the wine, tourism and wine tourism sectors and EM Strasbourg business school, University of Strasbourg. It is the only Chair in France specifically on these topics. There are similar Chairs in Spain: “La Cátedra de Agroturismo y Enoturismo de Canarias de la Universidad de La Laguna” (Canarias) and La Cátedra Casa Cesilia de Enoturismo de la Universidad Miguel Hernández” (Comunidad Valenciana). The project of the “Wine and Tourism” Chair is to support and develop the dynamics of innovation of the various economic and institutional players in the wine, tourism and wine tourism sectors. It therefore leads to the emergence of new projects or ideas, through the creation of a “think tank” between different disciplines and sectors. It allows for a better transfer of information and knowledge between researchers and practitioners and vice-versa. Finally, it involves increased financial participation in research work on practical issues related to wine and tourism.



4.2. The Objectives and Missions of the Chair in “Wine and Tourism”

The objective of the “Wine and Tourism” Chair is to provide a strategic vision and to encourage innovation and the development of know-how around the topics of wine and tourism. It was created in 2017 adopting a collective approach in co-construction with researchers and practitioners around three main objectives:

1. *Innovation*: Creation of a think tank for interdisciplinary and intersectoral exchanges on the topics of wine, tourism and wine tourism
2. *Impact*: Transfer of information and knowledge from the academic to the professional world and vice-versa
3. *Commitment*: Financing research projects related to the professional issues about wine, tourism and wine tourism.

The areas of action of the “Wine and Tourism” Chair are organized around three hubs:

- (1) A pedagogical hub to support teaching and program development

The “Wine and Tourism” Chair develops pedagogical projects around design of original training programs and creation of innovative teaching tools. It specifically supports the development and improvement of the master’s in international Wine Management and Tourism and the Master in Tourism Management, and Executive Education courses at EM Strasbourg Business School. The academic contribution of the Chair is the result of the co-construction of knowledge with partner companies. Courses are based on winning pairs of academics and practitioners. Interactions with practitioners make it possible for students to learn about cutting-edge information or emerging subjects related to wine tourism even using ICT like virtual reality in courses. Students work on real-life case studies or participate in virtual or physical onsite training days. There are days of total immersion in the real problems of a company. The apprenticeship is done with the help of meetings and interactions with the managers of the host company based on real-life cases. Results are an integral part of the pedagogical base used in the courses and, also, provide answers for manager to strategic problems they face.

- (2) A research hub to conduct research work

The “Wine and Tourism” Chair enables research work to be anchored in the real practices of companies. This anchoring is a double necessity. The first is intrinsically linked to the development of research in management science in line with the needs of stakeholders (companies, institutions, etc.). The second is the need for research work to be financed by the stakeholders directly concerned. The “Wine and Tourism” Chair is composed of four main research themes. The first concerns marketing, and more specifically the behaviors and experiences of wine tourists and the development of wine brands. Researchers also work on the logistics and distribution channels of the wine industry. A third theme studies the business



models of wineries and tourism companies and investigates the governance of the sector, or how the different players collaborate and interact when developing inter-organizational projects. Finally, researchers also evaluate how digitalization and the fostering of innovation impacts the wine and tourism sectors. The Chair in “Wine and Tourism” brings together researchers from different universities in France and around the world providing them with the opportunity to create and develop cross-regional and national projects. They come not only from University of Strasbourg, but also from the universities of Champagne-Ardenne, Montpellier, Perpignan Savoie, La Rochelle and from Adelaide University and the University of South Australia in Australia and Sonoma State in California.

(3) A business hub to encourage partnerships with companies

The Chair in “Wine and Tourism” is a meeting place where companies and organizations can share best practices, where they can benefit from the insight and expertise of researchers in the field, and where they can carry out studies, investigations or dedicated training courses for professionals. It is also a recruitment tool as they have access to interns, apprentices and young graduates. Bringing students into contact with companies through various pedagogical initiatives (onsite training days, group work on practical issues, dissertations and case studies) is a determining factor in the employability of students. Being a member of the Chair in “Wine and Tourism” enables companies to develop an exclusive partnership with an internationally renowned university. Through this mechanism, the company can strengthen its visibility and reputation.

4.3. Knowledge Dissemination Activities

There are different means for the Chair in “Wine and Tourism” to disseminate the knowledge created through collaboration projects between researchers and practitioners:

- (1) The scientific publications consist of published research articles in ranked and recognized management journals (International Journal of Entrepreneurship and Small Business) , research articles presented at national and international conferences (Academy of Wine Business Research, American Association of Wine Economics, International Organisation of Vine and Wine, etc), books (Thach & Charters, 2016; Sigala & Robinson, 2019; Sotiriadis, 2018, Sigala & Haller, 2021-forthcoming) and chapter. In total, the scientific contributions accounted for 10 published research articles and 18 academic conferences.
- (2) National research seminars. Cross-regions research seminars are organized at a national level to allow researcher to share their research projects. For example, researchers from the University of Reims Champagne-Ardenne and from EM Strasbourg Business School met at Nicolas Feuillatte Wine and Champagne Centre for a day of research. They provided a cross-examination of the management of Champagne and Alsatian vineyards on issues such as: wine tourism, the risks associated with wine distribution, private labels, the behavior of Generation Z consumers, the digitalization of the wine world, responsible governance, the structuring of wine groups, and even wine land. It was also the opportunity to taste Nicolas



Feuillatte vintage Champagne range and to visit the Nicolas Feuillatte Space, a real showcase for the company in terms of hospitality and events.

(3) Creation of an International Research Workshop in Wine Tourism

The Chair in Wine and Tourism has also launched an *International Research Workshop in Wine Tourism* in an attempt to extend the scholar's community on Wine Tourism. The workshop is designed to gather both wine tourism professionals and researchers in order to discuss the current challenges for the wine tourism industry and delineate its future directions. The first workshop took place in Strasbourg in June 2019. It featured a full research day followed by an immersive field trip in the Alsace vineyard on the second day. Through the presentation of more than 20 studies and research work in progress, this international workshop highlighted the transformations taking place in this booming industry. In particular, it was clear that Europe is often inspired, in its own way, by trends born in the New World. Topics like urban wine tourism (Gastaldello & Rossetto, 2019), wine tourism for millennials (Velikova *et al.*, 2019), wine tourism mobile app (Kirova & Vo Thanh, 2019) or eWineTourism (Haller *et al.* 2020a) were discussed together with local wine makers and growers and published in proceedings (Proceedings, 2019). The second edition of the *International Research Workshop in Wine Tourism* is dedicated to Wine tourism challenges, innovation and futures. Due to the health situation, the 2020 workshop will be held online and be the first International Research E-Workshop in wine tourism (Wine Tourism, 2020).

(4) Co-Creation of Regional Cluster around innovation for the wine industry

Following a conference organised by the Chair in "Wine and Tourism", a regional InvinoTECH® ecosystem was created. Supported by FrenchTech Alsace, InvinoTECH® brings together more than 25 wine industry players including: wine estates, professional wine organisations, training centres (engineering school and management school), institutional and financial players, start-ups, and industrial and marketing suppliers. As a "think tank", InvinoTECH® allows for cross-fertilization during open meetings or idea forums aimed at supporting sustainable innovation and value creation. To this end, InvinoTECH® organized a first federating event in February 2018: the 1st Vineyard Hackathon. During a weekend, professionals from the wine industry, entrepreneurs, students and institutions came together as a team around different challenges such as allowing winegrowers to develop an enhanced wine tourist experience, creating a "Vivino" type application for a tactile description of wines, or an application that allows the sharing of equipment and services between winegrowers. The objective of the Hackathon is to create, around a strong human experience, a different innovation dynamic in which innovative digital projects can emerge that can be used for the development of tomorrow's wine world.

(5) Conferences

The Chair in "Wine and Tourism" organizes a six monthly conference open to professionals and the general public which provides cutting-edge information and results of scientific publications. The topic of each conference is decided according to the needs of the practitioners. For example, the latest conference topics were: Digitalization of the wine industry (Chair in "Wine and tourism, 2017), Enhancement of the vineyard through the development



wine tourism activities (Chair in “Wine and tourism, 2018), wine tourism of tomorrow (Chair in “Wine and tourism, 2019). The Chair in “Wine and Tourism” is also required to participate to national conferences in wine tourism organized by the French Tourism Agency to present the objectives and the missions of the Chair (Atout France, 2018).

(6) Press articles

The other possibility for the Chair to disseminate research projects results is to publish articles in specialised journals or national press. Recent articles have been published in The Conversation about “*wine tourism as a global race for innovation*” (Haller, 2019b), “*wine tourism as a new boundary for the French winemakers*” (Haller, 2019c), “*Alsace Wine Tourism*” (Haller, 2020c) and in Forbes France about “*Virtual Wine Tourism*” (Haller, 2020b).

4.4. Governance of the Chair in “Wine and Tourism”

The Chair in “Wine and Tourism” is composed of “permanent members” who are professors and associate professors at EM Strasbourg business school, University of Strasbourg and external experts. There are also “associate members” composed of French and international academics and practitioners from the Wine and Tourism sectors. They contribute to the reflection on trends in the sectors and act as a “think tank” of possible resource for implementing and developing educational, research and managerial projects. Finally, the chair also composed of “Ex-officio members” who are members by right through their reputation, specific actions, or significant role in promoting the Chair’s work. Those members are elected officials at regional or national level.

The Chair is sponsored by partners that are legal entities (companies, organizations or institutions) that have made an effective donation or have given support to the Chair in any form whatsoever (donations of money, sponsorship of skills or promotion). The first partner members to have been appointed are the Wine Council of Alsace (CIVA), The Grands Chais de France and a regional bank the Cr dit Agricole Alsace Vosges.

5. Challenges and Conclusion

The Chair in “Wine and Tourism” hosted by EM Strasbourg Business School, University of Strasbourg in France is unique of its kind around the world. It is an innovative collaboration based on education, research and corporate partnerships to value and promote wine tourism at a national and international level. In this Chair, researchers collaborate with practitioners to create collective, sustainable and reactive expertise to deal with the changing environment of the wine industry sector. It contributes to the development of an open, transversal and sustainable ecosystem based on players capable of collectively enhancing the value of wine tourism.

It can be considered as a possible lever of innovation to ensure sustainable performance for all the players in of the wine tourism sector. In this innovative ecosystem, the researcher is rather considered as an effectual network builder who value managerial and network recognition for his research results



as much as scientific recognition. It implies being in constant contact and building on proximity relationships with practitioners to nourish pedagogical program, courses and train future talents for the wine tourism industry. On the other side, practitioners and business partners should consider financially supporting research and education in wine tourism. In order to contribute to the recognition of wine tourism as an economic sector as such, it is crucial that researchers and practitioners work collaboratively in developing research projects, training programs and strategic best practices around wine tourism.

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Part II

Wine Tourism in Spain



Online Wine Tourism Supply and Demand in Spain*

*Raúl Compés, José Antonio Ontalba,
Jorge Cobos & Francesc Josep Cervera Ferrer*
Universitat Politècnica de València (Spain)

Abstract

The development of ICT and the Internet has radically changed the business model of the tourism sector. In the case of wine tourism, an increasing number of market players use the resources of cyberspace. In addition to the possibility of carrying out transactions using electronic commerce models, companies use it to communicate their services and consumers to search for information. All this activity generates a large amount of virtual data that constitutes an interesting field of analysis for big data techniques.

This chapter studies the characteristics of online supply and demand for wine tourism in Spain, using this methodology. To do this, a sample of potential clients' search terms related to wine tourism on Google –in Spain and in Spanish– were analysed and compared with the content supplied by a large group of sector providers, made up of 1,035 websites. The results show that companies' communication response is not fully adapted to users' information demand. The new and uncertain economic and social scenario unfolding due to the crisis caused by the COVID-19 pandemic, means that it will be necessary for wineries to depend more on these digital tools and analyses to develop a more sustainable and innovative wine tourism model.

1. Introduction: From the Traditional Market to the Wine Tourism Market 2.0 in Spain

Enotourism, or wine tourism, can be defined as a thematic tourism product or tourism segment, in many cases associated with gastronomy (López-Guzmán *et al.*, 2013). As with any other market, its economic analysis depends on the knowledge of supply and demand.

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* This chapter was made possible by funding from the eMarketwine project (CSO2016-78775-R).



Traditional studies on the demand for wine tourism in Spain have focused on quantifying the physical visits of tourists to wineries and estimating growth potential (López-Guzmán *et al.*, 2013). In general, these are studies based on market research carried out by means of surveys (increasingly online) in specific areas. They are interesting but limited due to the lack of a common methodology (Getz & Brown, 2006).

Traditional studies into wine tourism supply cover both winery services and those provided by companies and entities with complementary services (hotels, restaurants, museums, leisure companies, etc.). In the case of Spain, the integrating role played by the “wine routes” is particularly important for a large part of the offer. As explained in Chapter 8, it is a “product club” model created on the initiative of ACEVIN (Spanish Association of Wine Cities). Aware of the importance of access to reliable information on the market situation, in 2008 ACEVIN created the Wine Routes Tourism Observatory which, by means of different field studies, provides information focused on the number and profile of visitors to each of the routes and their economic impact. To improve the quantity and quality of this information, the Barometer of Wine Tourism in Spain was presented in January 2020.

In this context, new information technologies can increase the capacity of traditional tools as an instrument for market surveillance and intelligence. Its use is already relatively widespread in the sector (Lazo, 2012; Duarte *et al.*, 2013) and this has impacted on an improvement in the wine tourism offer (Lopes *et al.*, 2012; Mancino & Lo Presti, 2012; Lazo, 2014) both through the web and social networks (Huertas *et al.*, 2015; Sigala *et al.*, 2019). These new tools have caused a change in product design and in the wineries’ communication and digital marketing strategy (Thach, 2009; Scorrano, 2011; Lazo, 2012) and have increased the electronic commerce of wine (Vázquez *et al.*, 2014).

The next challenge, without losing sight of the need to continue extending the use of digital technologies among an increasing number of companies, is to use the potential of big data techniques to take better advantage of the knowledge of virtual demand in wine tourism service design, which includes both the product itself and its communication¹. In a post-COVID-19 world, this type of knowledge can provide a competitive advantage to offer a sustainable and innovative wine tourism model.

With this background, the objective of this chapter is to study online wine tourism in Spain during a period of normal tourism, that is, using recent data, but from prior to the serious crisis caused by COVID-19, based on big data studied using cyber-metrics (Orduña-Malea & Aguillo, 2014). It is exploratory investigation into the demand, based on Google searches on the subject in Spain, and of the offer, taking into account the informational content of wineries, wine routes and specialized agencies on their respective websites, and the cross between them².

The results will reveal little-studied aspects of the interests of wine tourism consumers in Spain and of company communication content. In addition, it will be possible to verify the capacity of these tools for measuring the degree to which supply adapts to demand. In this way, it is possible to provide wineries

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1 Big data analysis tools allow the extraction of valuable information from the massive data generated by the constant use of these new information technologies by millions of Internet users. From this data it is possible to extract preferences, behavior patterns, trends and knowledge of great interest to companies (Davenport & Harris, 2007; Akter & Wamba, 2016).

2 Social networks are left aside here, since their content is usually a mirror of the information offered on websites.



and other wine tourism service providers with useful knowledge to improve both their online supply as well as their communication.

2. The World of Online Wine Tourism 2.0 in Spain

To begin the analysis of wine tourism 2.0 in Spain, the first step is to scale it. It is an extremely broad universe to study, much more than the physical one companies and clients make up. According to Google, in 2020, it consisted of 4,570,000 Internet content sources mentioning “wine tourism” in Spanish, 290,000 videos and 230,000 news and blog posts. Although Google does not reference the origin of this content, the search engine Bing determines that 1,290,000 belong to Spain, which provides us with a more accurate idea of the size of this virtual world.

Next, it is necessary to determine the groups or typologies of websites to be studied. In this case, those corresponding to the three key players of the wine tourism supply sector were selected: a) the websites of wineries with a primary interest in wine tourism, b) the websites of the tourist routes that bring together operators and institutions interested in wine tourism in Spain, (acting as information or data brokers between users and service providers) and, c) the websites of tour operators specialized in wine tourism, which are designers and providers of specific commercial tourism offers.

The universe thus defined consists of:

- 974 Spanish winery websites including references of anything to do with to wine tourism in its content³. These wineries have created 858 profiles on Facebook and 665 accounts on Twitter, as well as 253 on LinkedIn (an online network more oriented towards professionals and companies), which denotes the preference of Spanish wineries for addressing the general public. Likewise, they prefer to share photos especially on Instagram (447 accounts), as well as on Pinterest (97) and Flickr (62). Finally, only 356 active accounts were detected on YouTube (a third of the total), despite being the second most used online information search engine in the world, behind Google itself, which indicates that there is a content niche (in this case video) to be exploited.
- 43 official wine route websites, which have 35 accounts on Twitter, 38 on Facebook, 11 accounts on YouTube, 20 on Instagram, 8 on Pinterest and 5 on Flickr.
- 18 websites classified as specialized, wine-tourism tour operators, with 10 pages on Twitter, 13 on Facebook, 5 on YouTube, 6 on Instagram, 3 on Pinterest, and only one on Flickr.

This data shows that there is a coincidence in the type of client to which their communication is directed, and the networks on which they expect to find them.

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3 According to data from the INE's (Spanish National Statistics) Central Business Directory (DIRCE), on January 1, 2018 there were 4,151 wineries in Spain (CNAE Code 1102 "Winemaking").



3. The Online Demand for Wine Tourism in Spain

In the tourism sector, big data techniques allow the range of traditional research into tourism demand to be broadened (Li *et al.*, 2018). With existing information on the Internet, it is possible to analyse clients' search patterns, which enables their most common interests to be deduced (Marine-Roig & Clavé, 2015; Miah *et al.*, 2017).

In this section, an investigation was carried out into the searches for wine tourism in Spain, and in Castilian Spanish⁴— to determine what Internet users and potential clients of this type of tourism search for, how they search and with what terms. This information is considered to reveal one's tastes and market trends.

To do this, the longitudinal and geographic search analysis tool, Google Trends⁵ was used first. This enables the search for historical data, from 2004 onwards, the last five years, or another period, as appropriate, on the level of intensity of certain terms or keywords that are of interest to wine tourism seekers. Only those that have a certain number of searches per month appear, the minimum is not disclosed by Google, but it is a metric that allows us to positively associate search intensity with interest and, ultimately, with the demand for that type or aspect of service⁶.

The analysis begins with the choice of a “seed” or original term of interest to guide the search process. The most logical course of action would appear to be to study whether the term “enoturismo”⁷ fulfils this function, and it is therefore compared with “turismo del vino”, which is the literal translation of wine tourism, the most commonly used expression in English. Indeed, Google Trends confirmed that, “enoturismo” is a term used much more than “turismo del vino” in Spain (Figure 1), and, therefore, this will be the expression used throughout the chapter⁸. It was also found that since 2004 there has been great variability in the intensity of use of this term, which is a sign of high seasonality, although no clear trend was perceived.

If the search is limited to a shorter series, of 5 years, the relatively consistent trend and the seasonal component of interest mentioned above can be seen more clearly, with a high exceptional peak in the second week of November 2016⁹. The analysis of shorter periods; 1 or 2 years, corroborates both irregularity and seasonality, and allows us to distinguish moments of search intensity more clearly

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4 Other languages are obviously used for searches in Spain, including English of course. The choice of Castilian or Spanish is deliberate, both because of the fact that it is the global language and because the intensity of searches for “enoturismo” in Spain is much greater than that term in other languages, including that of “wine tourism”.

5 This analysis was carried out using Google, as it is the largest and most widely used search engine.

6 In the temporal analysis, errors can be made in the comparisons between different moments in time, since changes have occurred in the search terms for various reasons, without the concept or final intention of the search having changed. Therefore, all these analyses must be completed to improve the ability to interpret the results.

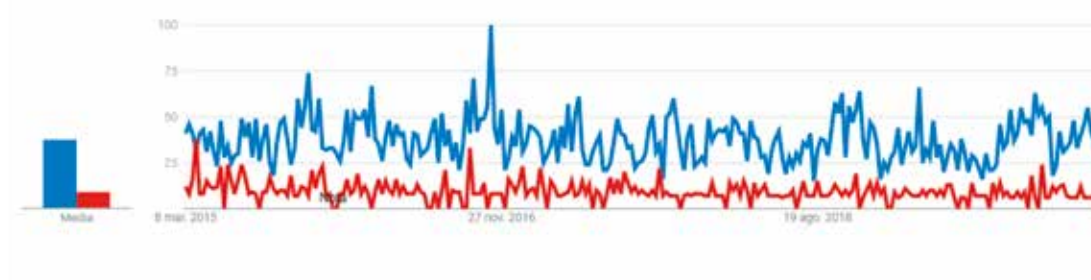
7 Unless otherwise stated, all search terms are considered in quotation marks, since in this way the search profile based on a specific concept is much more specific. The analysis could be extended by considering wine tourism without quotation marks, or even as a topic, but this should be the subject of a more detailed research work.

8 One of the difficulties in analysing information on the Internet is the great importance of lexicon management. Methodologically, it must be understood that Internet users can search using vastly different terms, given their technical ignorance, to those of an expert in the field. Thus, a technically orthodox term such as “wine tourism” may not be the one most used by those showing an interest in visiting wineries, which can be reached through other terms. Just as verbal language changes and evolves, written search terms change, so it is interesting to work with a wide range of search queries.

9 The order of magnitude of both terms in the series since 2004 has not changed, so it makes sense to focus solely on “enoturismo”.

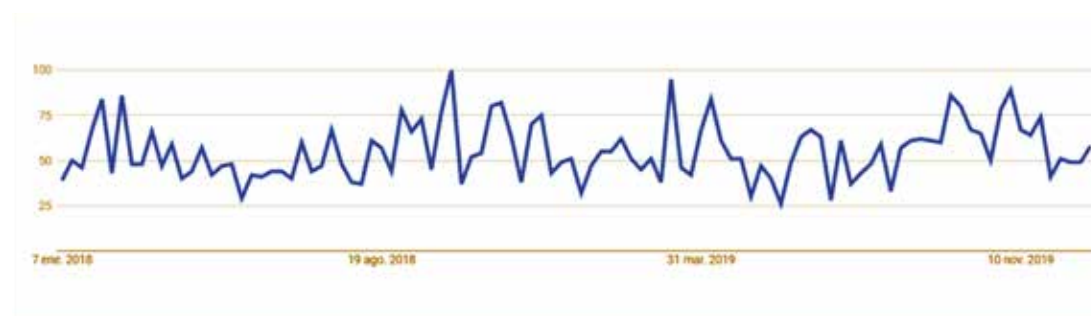
around February-March and October-November (Figure 2). This pattern of virtual searches leads us to think that wine tourism in Spain is concentrated in the early spring and autumn months, and that it is especially associated with short breaks, taking advantage of long weekends or local and national public holidays.

Figure 1.
Search terms “enoturismo” (blue) and “turismo del vino” (red) in Spain in the last five years



Source: Prepared by the authors using Google Trends (3/3/2020).

Figure 2.
Search terms “enoturismo” (blue) in Spain from 1/1/2018 to 1/1/2020



Source: Prepared by the authors using Google Trends (3/3/2020)

Once the pre-eminence of the expression “enoturismo” over “turismo del vino” and the seasonality and irregularity of the online demand for this expression had been determined, the analysis enabled research into the most important search attributes associated with wine tourism. In Spain, as in much of the wine world, one of the characteristics of wine most appreciated by consumers is its origin, it was therefore logical to analyse the interest of wine tourism by geographical area. This is also the criterion used in the European Union to define both PDO (Protected Designations of Origin) and PGI (Protected Geographical Indications), as well as Wine Routes.



Using conventional analysis tools, ACEVIN's Annual Reports on wine tourism on its wine routes in Spain show that there are great differences amongst them in terms of visitor numbers. The 2019 Report, for example, confirms that the leading three, the Sherry Region (with 18.5 %), Ribera del Duero (with 12.6 %) and Enoturisme Penedès (with 12 %), concentrating more than 43 % of the total visitors to the "wine routes" product (out of a total of 3,076,334)¹⁰.

The wine tourism 2.0 search analysis, using the exact names of the ACEVIN wine routes, shows different results. The only route that has sufficient data on Google is that of Ribera del Duero, while the rest lack enough volume to appear in their Google Trends series (Figure 3). Additionally, the granular analysis, applied to a much more specific term, allows us to appreciate more clearly the strong seasonality and irregularity of wine tourism on the most sought-after route in Spain (Figure 3).

Figure 3.

Interest in the search term "Ribera del Duero wine tourism", in Spain, in the last five years



Source: Prepared by the authors using Google Trends (3/3/2020)

Obviously, Internet data does not invalidate physical data; what it shows is that, probably, the brands of numerous wine routes are little known and identified as tourist products. This may be due to various circumstances: either their real clients do not preferentially use the Internet to plan their wine tourism trips or, they use terms that do not correspond to the name of the Route in their searches. Hence, their names are rarely used as search terms, although this is not incompatible with the fact that potential tourists interested in these areas cannot reach them through other, more popular or commercially established search terms.

It could be the case, for example, of "Enoturisme Penedès", which does not appear, compared to "Enoturismo Cataluña", which has a significant volume of searches to appear in Google Trends; and the same could be said of "Enoturismo Rioja Alta", which also does not appear, compared to "Enoturismo Rioja". However, it is not always necessary for the name of the region or geographical area to be more searched for than the name of the route or routes it contains. This is demonstrated, for example, with the terms "enoturismo Andalucía" or "enoturismo Aragón", which do not have a

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¹⁰ Tourist Observatory Wine Routes of Spain. Year 2019. "Spain's Wine Routes". Report on visitors to wineries and wine museums. ACEVIN.



significant search volume. The reason may be that these Regions do not constitute as large a market as that of Catalonia, nor do their names coincide with that of a prestigious denomination of origin, such as “La Rioja” and “Rioja”.

Combining all the types of territorial names mentioned; wine routes, appellation of origin and Region, it turned out that the largest online demand for wine tourism in Spain corresponded, in the following order, to the terms: “enoturismo Rioja”, “enoturismo Ribera del Duero” and “enoturismo Cataluña”, the interest in the term “enoturismo Rioja” was greater than “enoturismo Ribera del Duero” (Figure 4), although by wine route name the latter ranked first, as mentioned.

Figure 4.

Interest in the search terms “enoturismo Rioja” (yellow), “enoturismo Ribera del Duero” (blue) and “enoturismo Cataluña” (red) in the last five years



Fuente: elaboración propia a través de Google Trends (3/3/2020).

All these results prove the importance of knowing Internet users 2.0 search demands to design brands and content if you want to have visibility and impact. It also shows the possibilities of this tool to find out the positioning of the most important search terms on the Web, and the applications that can be derived for wine tourism providers¹¹.

4. Searches for Terms Associated with Wine Tourism

The analysis of the previous point is actually the gateway, or an approximation, to find out consumer interests and search patterns. Getting to know the preferences of Internet users seeking information on wine tourism is complex. The previous results are not conclusive, because the interests of potential clients can be expressed using words or expressions associated with “enoturismo”, but that do not explicitly include this term. This could happen, either due to unfamiliarity, or because their preferences

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¹¹ Another interesting application of Google Trends is, for example, the Autonomous Community or Region ranking, based on the highest search frequency using the term “enoturismo” in proportion to the total number of searches carried out in each location. This classification was led by La Rioja and Castile and León in all the periods analysed.



are directed towards certain aspects that can be considered attributes of wine tourism¹². Knowing these expressions is extremely useful for wineries, wine routes and specialized agencies, since it allows them to design their contents so that they are found in the search process, and of course in communication, marketing and advertising campaigns¹³.

The ideal tool to extend the analysis, considering the plurality and semantic diversity of search expressions, although connected to a root concept, is Google Keyword Planner. In fact, it is designed to find words related to the seed search (in this case “enoturismo”)¹⁴. When applied in this study, more than 1,900 search terms associated with wine tourism appeared. Of these, the tool highlighted 113 with a search volume high enough to offer results of interest. In addition, they represent 99 % of the 1,275,000 annual searches on the subject of wine tourism¹⁵. In turn, there are large differences between the aforementioned 113, since they follow a power-law type statistical distribution model by which there is a small group of terms that are highly sought after in relation to the rest¹⁶.

To facilitate the interpretation of these terms, it is recommended to group them by key concepts. This operation allows different variants, since the same expression can be classified in different ways - for example, the expression “ruta del vino de rioja oriental” (Eastern Rioja Wine Route) can be classified both as a search type “ruta” (route) and as a search type “geographical specification”. Furthermore, to assess the importance of a certain term, it must be taken into account that the number of terms with which it is associated is not the same as the number of searches it represents in the total.

Thus, for example, in this case it was observed that searches containing an origin or a geographical location, especially names of provinces, counties or designations of origin, such as “enoturismo Valencia”, “ruta vino Somontano”, etc. accounted for 65.79 % of the 113 terms selected, although they represent approximately 20 % of searches. However, terms that associate wine tourism with “cata” (tasting), for example “cata de vinos”, “escapada cata de vinos” (wine tasting, wine tasting getaway), etc. account for 25.44 % of the 113 terms, but represent 66.4 % of the searches.

Comparing both results, this means that although there was a greater variety of search expressions using a geographical indication than expressions referring to tasting wine, there were many more searches that showed an interest in wine tasting. In short, the useful interpretation for companies is that Internet users in Spain who are potential wine tourists mostly associate wine tourism with wine tasting.

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12 These methodological issues occur in other countries as well and make international comparisons difficult. The search terms respond to social and cultural guidelines, and do not lend themselves to a comparison by translation. For example, the expression “turismo del vino”, “wine tourism”, or its respective national translation, is much more frequently used than “oenotourism” in many countries of the wine world.

13 For example, a search for the literal expressions “wine tourism” and “wine tasting” results not only in a close association between them, which is to be expected, but also a greater use of the form “wine tasting” by potential tourists on-line. It is a sign of the importance assigned to “cata” or “tasting” within the wine tourism experience.

14 In response to a seed word, Google Keywords Planner offers a set of words employed by users. The association criteria is not disclosed by Google, but it seems to be a mix between words that have common letters (lexical roots, for example), that have been searched for in the same sessions, or that have been clicked on more in ads with those groups of words.

15 Of these, 28.60 % are searched on the PC, 65.31 % are searched from the mobile, and 6.09 % using a tablet. This data shows that in the online world most users employ their own mobile as a device from which to search their tourist plans.

16 However, expressions with fewer searches should not be overlooked, as they can be especially useful for a specific winery that wants to improve its local positioning. By tailoring your content, you can get your information to appear first in search results for your target audience and at the right time through SEO (Search Engine Optimization) techniques and digital marketing.



The remaining search terms can be grouped into the following categories:

- i) A specific word is used in the search term, for example: “hotel enoturismo mainetes albacete” or “enoturismo lagar de costa” account for 11.40 % of the expressions and 0.52 % of the searches.
- ii) The word “ruta” (route) is expressly used, for example: “ruta de vino ribera del duero”, “rutas vino” (wine routes), etc. represent 9.65 % of the terms and 6.4 % of the searches.
- iii) A diverse and heterogeneous set that groups together various search terms with words that denote generic tourist interest within this topic. For example, “visita bodegas” (winery visit), an interest in training and knowledge, for example, “curso vino”, “curso cata”, “curso enoturismo” or “cultura vino (wine course, tasting course, wine tourism course or wine culture) or, finally, an interest in carrying out a particular action without restricting your search geographically, for example, “venta vino”, “evento vino”, “hotel vino”, “enoteca vino”, “escapada vino”, “experiencia vino”, “arte vino” or “tapa vino” (wine sale, wine event, wine hotel, wine cellar, wine getaway/break, wine experience, wine art, wine tapas).

5. Response of Supply to the Online Demand for Wine Tourism

Once the main characteristics of the way in which Internet users search for information related to wine tourism are known, it is possible to study the relationship between this search pattern and the information that the websites studied provide. This way, it can be determined if the information on these sites responds, intentionally or unintentionally, to those searches and if, therefore, there is a match between the searches and the contents or if, on the contrary, the online offer is leaving out services and terms that correspond to highly sought after concepts. The demand for unsatisfied content measures the number of searches that are lost and that do not reach a given website, with the potential loss of business that this entails.

The analysis focuses on the sample made up of the 1,035 websites selected for containing expressions that denote a genuine interest in wine tourism –these are 974 wineries, 43 wine routes and 18 specialized tour operators–. For each search expression its most specific form was used, that is, in quotation marks. Thus, for example, we searched for “cata maridaje” (pairing tasting) and not simply cata y maridaje (tasting and pairing), without quotation marks. It is an important detail, because the quotation marks tell Google to search for content that uses that phrase literally, without any additional words.

This analysis strategy greatly restricts the possibilities that the contents of a website match search terms exactly, but it identifies something that is particularly important from a content management point of view; intentionality. It is, therefore, an indicator that measures the extent to which the Web manager knows and uses digital marketing and search engine positioning (SEO) techniques. In this way, most coincidences are eliminated by chance and professionalism is captured in the design of



services and contents of the online supply; that is, the effort made by the domains analysed in their strategy to be found by the search engine and, therefore, to respond to the online demand of potential wine tourists.

The results show that, grouped together, the 1,035 websites analysed provide 107,919,783 contents (amongst texts, images or other formats found in their domain and that are indexed by Google) for the 113 searches carried out with the identified terms by Google Keywords Planner with the highest volume of activity (taking into account that, in many cases, the same content can respond to several of these search terms). By supplier profile, the wineries offer 99.99 % of the contents, followed by the wine routes, 7,668 contents in absolute values, and the tour operators: 5,228. This means that the online supply of wine tourism content is overwhelmingly dominated by wineries, which appear as the main player in this activity, which is largely reasonable.

Additionally, the wineries provide an average of 110,787 contents each, for 178 the wine routes and 290 the tour operators. This result is also reasonable, since the online offer of the wineries is broad and diverse and covers a very wide range of services and activities; compared to it, the offer of specialized operators is extremely specific and limited.

As before with the search terms of Internet users, there is a power-law distribution in the terms used in the content of the companies, so that a few appear a lot and the majority appear truly little. Thus, the term “cata” (tasting), which corresponds to a potential customer search term, has 98,001,859 responses, of which 98 million among wineries. Other very abundant terms in the analysed websites, in addition to the aforementioned “cata”, are: “enoturismo” (4.970.000), “cata de vinos” (3.910.000), “arte vino” (334.000) y “cata a ciegas” (179.000). (wine tourism, wine tasting, wine art and “blind wine tasting”). This means that most wineries concentrate their content on a few terms - search terms, leaving aside others which could help them differentiate themselves and improve their positioning in the online market for wine tourism content and services. As an example, there are 51 search terms that do not appear in any content in the case of wineries, which means “0 answers” in Google for 44.74 % of the search expressions, 84 in the case of routes (0 responses for 73.68 % of the searches) and 80 for the tour operators (0 responses for 70.18 % of the searches). Furthermore, there are 46 search terms that do not appear in any of the three types of websites studied. These results show the opportunities for improvement in the design of wine tourism company websites to appear and be visible in the Internet searches of potential users.

6. Conclusions

Online analysis of wine tourism demonstrates its ability to broaden the knowledge of the interests of wine tourists in Spain (and in Spanish) and of the services supplied by wineries and other specialized companies in the sector. This information is of great interest to the industry, as it serves to improve the adaptation not only of product supply but also its communication to virtual consumer demand, reflected in Internet searches, thus expanding the results of traditional market research.



As an indicator of internal demand, in Spanish and from Spain, which is reflected in Internet consultations, there are more than 1,275,000 annual searches on the subject, only with a subset of search expressions recommended by Google. These search expressions follow a statistical power-law type distribution, whereby a few terms are searched a lot, and many searched only a little. As a seed search, the predominance of the term “enoturismo” (enotourism), as opposed to “turismo del vino” (wine tourism) has been noted.

The semantic analysis of the search terms reveals that, for the most part, searches are associated, firstly, with geographic locations and, secondly, with wine tastings. This preferential use of geographical terms suggests that Spanish wine tourists seek wine tourism experiences in those areas that they know best or which are of interest to them. In this sense, the interest that Ribera del Duero and La Rioja arouse to carry out wine tourism activities is noteworthy.

This analysis also allows us to infer the intention of wine tourists in Spain as Internet users. The results obtained show that the majority use it for information, and only in a few cases do they use the Web with direct transactional intentions. The search terms used denote that the average potential tourist comes with the intention of prospecting, since the most common search phrases or expressions are very generic. This can be interpreted both as a limited knowledge of the wine tourism offer and an open mind to discovering new wine tourism experiences to carry them out later.

Regarding the online offer of the websites corresponding to the three types of market players analysed, a concentration of content was observed in a few search terms. This means that there are many terms used by applicants that could be used to differentiate themselves and improve both the design and communication of wine tourism services. The message is that wineries, wine routes and tour operators in Spain still have a long way to go to respond to the interests of users, clients or potential clients of their services, which reflect their interests in the terms they use in their Google searches.

Finally, the global crisis caused by COVID-19 will force the wine tourism industry to redesign its services and its communication strategy. In this new stage, wineries will probably have to introduce innovations to respond both to the restrictions approved by the authorities and to the new preferences of consumers. The knowledge of the interests of the users by means of big data techniques, together with the digitization efforts that companies must carry out to adapt to the new times, should be used by wineries to design a more sustainable and resilient offer. Unfortunately, there is nothing to suggest that similar crises will not occur again in the future.

It has therefore been verified that big data analysis is an essential tool for designing wine tourism as a product and communicating it via the Web.



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Models of Wine Tourism and Gastronomic Tourism in Spain

Manuel Ángel Romero Ligeró
DINAMIZA Asesores

Abstract

This chapter presents the most representative models for the development of gastronomic tourism that have been followed in Spain in recent years by the different institutions and agents related to tourism, hospitality and wine to promote this type of travel based on the wine and gastronomic culture. Special attention has been paid to one of the star products of tourism in Spain; the “Wine Routes of Spain”, a tourism product club that has made it possible to develop a wide range of wine tourism activities and promote wine tourism throughout the country, bringing together 31 wine routes in the main wine-growing areas. Each wine route consists of a club in its territorial area and the “Wine Routes of Spain” Club is organized as a club of clubs, with the support of the main tourist and agri-food institutions.

1. Introduction. Gastronomy Tourism

Gastronomy tourism can be defined as a visit to primary and secondary food producers, gastronomic festivals, restaurants and specific places where the main reason for the trip is the tasting of dishes or the experimentation of the attributes of a region specialized in food production (Hall and Sharples, 2003). Thus, gastronomy tourism is based on getting to know and learning about, eating and tasting, as well as enjoying the characteristic gastronomic culture of a territory. Undoubtedly, the set of resources, products and services, available in a location around gastronomy, contributes to generating unique experiences for tourists, an activity that is completely in keeping with the new expectations of today's consumer demand that seeks experiences, memorable activities, much more so than just enjoying a good meal or passively visiting a certain place.

Gastronomy tourism is experiencing tremendous growth in many destinations. For some years now, from when it was a totally unknown tourist resource, until today, when most tourist destinations are catering for, or showing interest in promoting, this type of tourism, the creation of food and wine



tourism products and agri-food routes is gaining strength day by day in order to cater for an ever-growing demand.

Gastronomy tourism, in addition to being a remarkable, de-seasonalising, tourist product, with a large cultural component, is becoming a standard for the socioeconomic development of food-producing areas, generating real economic alternatives derived from the revitalization of tourism around the food and wine culture. Thanks to this mode of travel, food producers have created a new line of business for themselves, tourism. The tourism sector of a territory attracts a more specialized consumer demand and new entrepreneurship opportunities are generated in the area (receiving agencies, companies offering activities, transportation, etc.). Therefore, there is an important set of benefits for a food-producing territory achieve in promoting a gastronomy tourism project and managing to attract large tourism flows.

Gastronomy tourism can be considered an aspect of cultural tourism, in which the travellers immerse themselves in the gastronomic culture of a territory. It is important to note that this tourist experience is aimed at all people who want to experience the pleasure of gastronomy using their five senses, visiting producers, markets, gastronomic routes (ham, oil, cheese, wine, liquors, etc.), contemplate gastronomic landscapes, taste characteristic dishes of the region in hotel establishments, buy local products in specialized stores, visit museums, agri-food industries, participate in parties or events related to gastronomy or follow the traditions and social customs of the local people.

The concept of gastronomy or culinary tourism is not a new phenomenon. Thousands of years ago, merchants travelled abroad seeking to taste different foods and beverages to trade in or bring home (Wolf, 2002). In 13th-century Europe, the first gastronomic guides gathered information on the best inns and restaurants, guides produced by the “gourmets” of those times. These “gastronomic guides” have evolved throughout history up until our days in which they have become authentic gastronomic routes spreading all over the planet. Gastronomy is one of the most important pillars of any culture and responds to the biological, cultural and hedonistic needs of people. It is, therefore, a type of cultural tourism which is highly appreciated and valued by consumer demand. For this reason, not only do gastronomic tourists discover new flavours, textures and ways of cooking, but also get to know the culture and customs of a place in great detail.

A territory's gastronomy tourism proposals are generally articulated along and around gastronomic tourist routes or in tourist product clubs, the latter entailing, in many cases, the creation of gastronomic routes or itineraries. A tourist route is defined as the creation of a cluster of activities and attractions that encourage cooperation between different companies, both public and private, present in a geographical area and that serves as a vehicle to stimulate economic development through tourism (Briedenhann and Wickens, 2003). The routes can be articulated around any resource of special interest or cultural feature of an area, so it is necessary to define the theme that will identify the routes, taking into account the potential of each destination, as well as the level of employment that they could generate. The most powerful routes are the cultural ones, and among them, the gastronomic ones stand out. There are renowned gastronomic destinations where gastronomy is the main attraction, although it is always accompanied by other cultural and natural resources. The final objective is to promote the local development of the community where said route is to be marketed.



The “Product Clubs” deserve special mention for their contribution to improving the image and positioning of the destination. These are associations of tourism companies that meet quality criteria and are in charge of promoting and marketing tourism, producing audio guides, brochures, direct sales, discounts, promotions, gifts, sending newsletters and news to registered partners who share their passion for gastronomic resources. They organize specific culinary tour packages, events, raffles, guided tours, visits to wine cities and factories for guided tastings. They inform the media of their activities and carry out marketing strategies (Telfer and Hashimoto, 2002). The tourism product clubs are a follow-on from Porter’s clusters (1998)¹. This concept is the basis for subsequent analysis of groups of companies in the tourism sector that earn markets by creating their own tourism functions and generate growing economic and social benefits in the local community where they are located.

Gastronomic routes fulfil four fundamental objectives (Henderson, 2009; Plummer *et al.*, 2005; Jaffe and Pasternak, 2004; Telfer, 2001):

- 1.º Visitor satisfaction, since they contribute to generating a positive, pleasant and memorable experience for tourists, so that they feel in a positive state of mind.
- 2.º Economic profit, since they invigorate the region, enable sustainable local development, diversify economic activity in rural areas, create jobs and cushion depopulation.
- 3.º They improve the image and positioning of the destination. Gastronomy becomes a type of tourism because it is the main reason for the trip and not a complementary resource.
- 4.º They strengthen the local identity, since they instil a feeling of pride, homeland, or sense of belonging in the resident population due to the fact they have high quality gastronomy. Gastronomy and wine become a sign of local identity which is part of the memory of flavours, images and sensations.

2. Gastronomic Tourism in Spain

Gastronomy tourism has experienced significant development in Spain in recent years, extending to almost all regions. Thus, companies and destinations in practically the entire country pay increasing attention to gastronomy and have begun to develop tourist proposals of various kinds: wine routes, ham, cheese, oil routes, or non-gastronomic product clubs not themed on a specific gastronomic product, but on all the local gastronomic resources.

Likewise, gastronomy tourism planning and product creation has progressed in leaps and bounds. On a national scale, a case that stands out is that of the ‘Saborea España’ (Tasting Spain) program which came into being in 2007 due to the initiative of several public and private entities (Figure 1).

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¹ This author defines clusters as the geographical concentration of interconnected companies and institutions in a specific field, united by common and complementary factors.



Figure 1.
Saborea Spain logo



Source: <http://tastingspain.es/>

Many Regions or autonomous communities of Spain have also paid attention to this phenomenon and developed specific strategies and plans to promote gastronomic tourism, involving the primary, secondary and tertiary sectors, endorsing the interest of the different public and private stakeholders who belong to the gastronomic tourism value chain (Basque Country, Galicia, Extremadura, Castile & León, Catalonia or the Region of Murcia). Of all these initiatives, some, such as the Catalanian Gastronomic Product Club, Iberian Ham Routes, Extremadura Cheese Routes, Castelló Ruta de Sabor, (Route of Taste) or Euskadi Gastronómika are worth a mention. These are initiatives promoted by Public Administrations and supported by the private sector.

In relation to the demand for this type of tourism, according to data from the Ministry of Energy, Tourism and Digital Agenda, in 2015, the latest available, 8.4 million international tourists came to Spain to carry out gastronomic activities, that is, gastronomy was their main priority for visiting us. This means that 12.3 % of international tourists received in the year can be considered gastronomic tourists. They spent 9,663 million euros (€ 1,147 on average per head) visiting, above all, inland destinations.

In short, gastronomy has become an essential claim for the differentiation and attraction of tourist destinations and gastronomy tourism has also become a market segment in its own right. In relation to demand, it should be noted that gastronomic tourism attracts, above all, local people, domestic tourists, who make short trips, in many cases day trips, to enjoy local gastronomy.

This is shown in the 3rd Study of Gastronomy Tourism Demand in Spain (Dinamiza Asesores, 2019), carried out to determine the profile of tourists who go on trips and gastronomic getaways in Spain. The research, based on nearly 1,000 surveys completed during the months of May and June 2019, shows that 82 % of Spaniards could be considered gastronomic tourists, since they claim to have made at least one trip or excursion in the last two years with the intention of enjoying gastronomy. The enhancement of gastronomic resources is no longer just an option for national tourist destinations.

Nowadays, beyond its importance as a driving force for tourists, gastronomy plays a fundamental role in the image and positioning of tourist destinations and is an essential factor in improving tourist competitiveness.



3. The Wine Routes of Spain

3.1. The Origin of the Project

A significant number of wine regions in Spain are committing to wine tourism. The most prestigious Spanish denominations of origin have promoted an enotourism project or wine route through which they attract the general public to the territory to discover its landscapes, wineries and enjoy wine and other attractions (heritage, gastronomy, nature, villages and cities, etc.). The Wine Routes of Spain is the reference model in Spain for developing wine tourism in territory. It is a National Product Club promoted by ACEVIN (Spanish Association of Wine Cities), an entity created in 1994, among whose main aims is the promotion of wine culture in all its aspects.

The project started in 2001, when ACEVIN secured the support of the General Secretariat of Tourism of the Ministry of Industry, Tourism and Commerce to begin working on the definition and development of the regulation standards for the “Wine Routes” product. Within the framework of the “Quality Tourism Products” Program, integrated within the Comprehensive Plan for Spanish Tourism Quality (PCTE 2000-2006), the objective of which was to work on the design and development of new tourism products that would lead to the diversification and seasonal adjustment of the Spanish tourist offer, Wine Routes of Spain was considered a strategic product (Figure 3). Today it is still supported, recognized and highlighted as a star product of Spanish tourism, due to its innovative, thematic, cultural, gastronomic and inland character, and that it has emerged as a local territorial development strategy based on public-private cooperation and tourism sustainability. This has also been recognized by the various Ministerial tourism plans (Horizon 2020 Plan and National and Integral Tourism Plan 2012-2015).

Figure 2.
Wine Routes of Spain Logo



Source: <https://www.wineroutesofspain.com/>

The project began with work in 6 pilot destinations across Spain; (Jumilla, La Mancha, Rias Baixas, Penedés, Montilla-Moriles and Utiel-Requena) and today it has 31 certified wine routes (see figure 4) and four new destinations in the preparation phase for their integration into the Product Club (Madrid, Lanzarote, Gran Canaria, Tierra del Vino de Zamora).



Figure 3.
Map of the Wine Routes of Spain

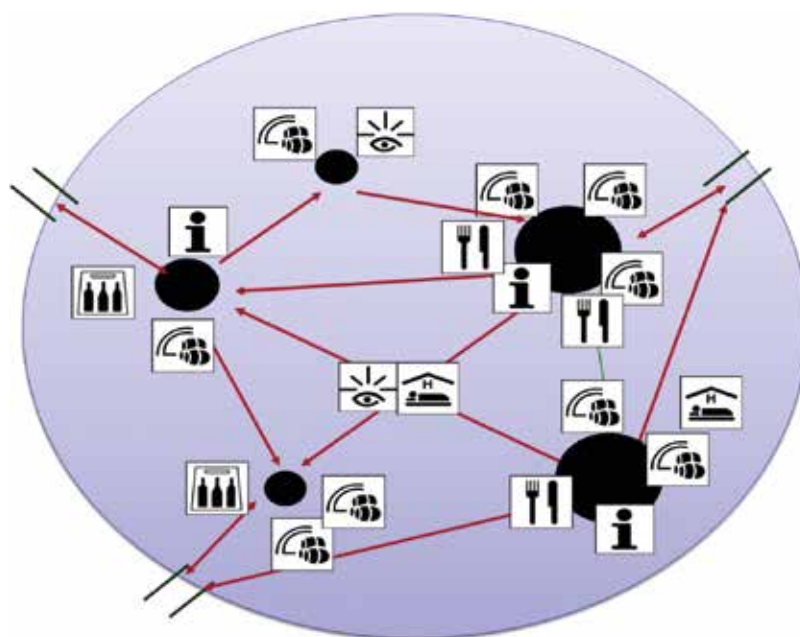


Source: ACEVIN – Wine Routes of Spain Product Club.

3.2. The Wine Route Concept

The “Wine Route” product consists of the formal integration, under the same thematic concept, of tourism resources and services of interest in a wine-growing area, considered from an authentic, vocational and experiential viewpoint, in order to build a product from the identity of the destination itself, to facilitate the joint marketing of the entire area and to guarantee that the level of satisfaction of consumer demand is met, thus promoting its integral economic and social development. Each wine route is conceived as a product club in its own territory, in which public (town councils, associations, etc.) and private stakeholders (wineries, accommodation, restaurants, shops, activity companies, etc ...) work in a joint and cooperative way to develop and promote the territory, and can be led by any of the players that comprise it (Figure 5). The Regulatory Councils of the Denomination of Origin who are strongly committed to wine tourism as it is part of their promotional role, are usually integrated in the Wine Routes.

Figure 4.
Graphic depiction of the Wine Route concept



Source: ACEVIN – Club de Producto Rutas del Vino de España.

It is important to highlight the value of the product. Wine, viticulture and all the cultural expressions that surround them become the key reasons for tourism development and generate an “atmosphere” in which travellers immerse themselves. From the perspective of a destination, a winery is not a product. A product is something which is much more complete and articulated, such as a route. Tourists perceive the world of wine in all the components of the tourist value chain that the Route represents. A Wine Route constitutes a tourism proposal around a geographical area which, preferably, should include several municipalities of a Denomination of Origin, or failing that, a sub-area of it.

3.3. A more Development - than Promotion-Oriented Model

Although each Route has its own management and finance model, to date projects have been more oriented to the creation and development of wine routes than to promotion. It was not until 2006 that the Wine Routes of Spain brand emerged, or development began on the joint promotional media of the Product Club. That was the year the first Wine Routes Marketing and Promotion Plan was drawn up, a plan that contemplated actions at national and international level for the period comprising 2006 to 2010. It was during this period when the first product website was also created www.wineroutesofspain.com and promotional material in several languages was produced. The main tourism fairs were attended, such as FITUR, INTUR, and the WTM in London, in which Wine Routes of Spain took part with its own stand.



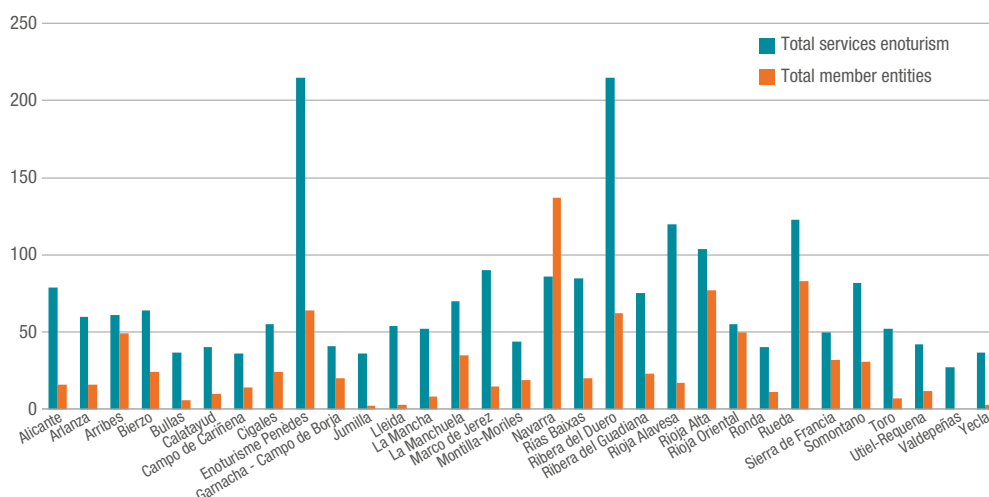
As progress has been made on the development of the wine routes, the Wine Routes of Spain product club has been focusing its priorities on promotion. The business network is much better prepared for tourism activities and wants efforts to be centred on national and international product publicity, and to attract the general public to the area for it to have an impact on their businesses. The wine routes generally carry out marketing support actions, such as farm trips or workshops, but it is the companies who are responsible for marketing their tourism product by the means at their disposal.

3.4. The Different Wine Routes: Development Stages

The volume of oenological and tourism resources of a certain destination belonging to a Wine Route is a highly relevant variable in determining the capacity of a route to attract and satisfy its visitors. Although the quality of the oenological resources of a destination is more decisive than the quantity, the Wine Routes of Spain product has defined a minimum of oenological and tourist resources that a route must include, so as to always ensure that there is a critical mass of resources and a diverse offer. These minimum requirements for wineries, hotels, restaurants, etc., are in the Product Manual and must be met by all routes. The number of key players that make up each route can be observed in the Wine Routes of Spain report on visitors to wineries and museums, (Figure 6). Services include wine and wine tourism companies, while entities include public (Town Councils, Provincial Councils, Associations of Municipalities...) and semi-public institutions (Business, cultural and professional associations, Regulatory Boards of Denominations of Origin...).

Graph 1.

Number of wine tourism services and member entities by Wine Route (2019)



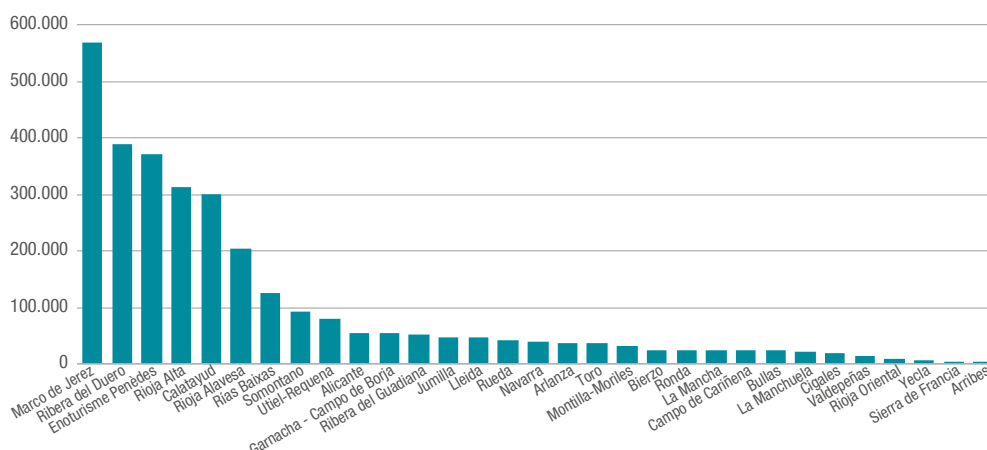
Source: Wine Routes of Spain Tourism Observatory (2020).



However, not all the wine regions participating in the “Wine Routes of Spain” project are at a similar stage of wine tourism development. Some destinations have come a long way, have a more solid, better positioned product, while others are still in an incipient phase (Figure 7). The most important thing, in the end, is not the degree of development of an appellation of origin with respect to its progress in the “Wine Routes of Spain” model, but the real potential of the destination to attract priority demand segments. And this depends on many different factors, among which we could highlight the positioning of the wines, the value of the wine landscape, the level of attractiveness of the wineries and their individual commitment to wine tourism, the proximity to the main source markets or the tourist development of the area. Some certified Wine Routes (which have passed the audit carried out by ACEVIN to verify the implementation of the Product Manual) will probably never be great oenotourism destinations, simply because the image and positioning of their wines is not adequate or because their geographical location limits their ability to capture consumer demand flows. However, they are routes that are promoting wine tourism in their territory, contributing value to all the destination’s stakeholders and, with the aim belonging to the Wine Routes of Spain Product Club, they are audited biennially, voluntarily.

Graph 2.

Number of visitors to Wine Routes of Spain wineries and museums (2019)



Source: Wine Routes of Spain Tourism Observatory (2020).

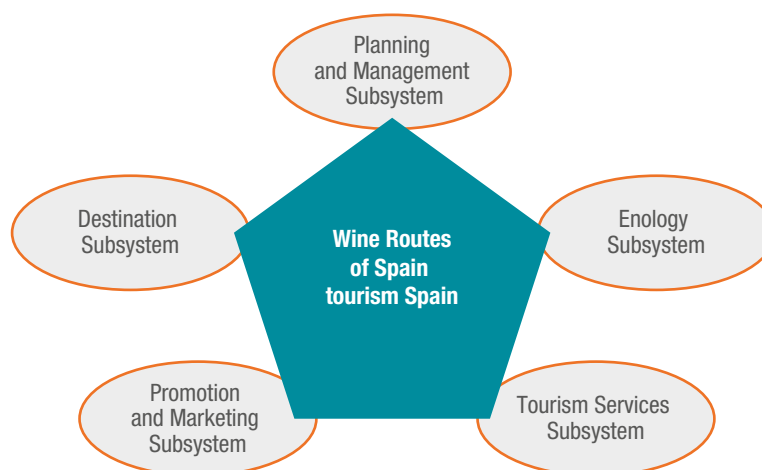
The main wine tourism destinations in Spain are Rioja (which has three wine routes: Rioja Alavesa, Rioja Alta and Rioja Oriental), Jerez, Ribera del Duero and El Penedès. Rioja, according to Regulatory Council data, receives about 850,000 visits to wineries each year; Jerez receives around 570,000 and Ribera del Duero and Penedès are close to 400,000. However, it is in Rioja and Ribera del Duero where one can really talk about wine tourists, whose main trip motivation is wine and its culture; in the case of Jerez and El Penedès, it is more about sun and the seaside or cultural tourists who take advantage of their stay in a coastal destination to go on a short excursion to a winery.



4. The Wine Routes Of Spain Product Manual

The Wine Routes of Spain Product Manual constitutes the model with which the Wine Routes are created, giving them their own entity and bringing the various key players related to wine tourism in the areas together in the project, defining the minimum requirements they must comply with to be integrated into the project and setting up a competitive wine route according to the potential of each territory. The Product Manual has been improved year after year, introducing the necessary improvements to respond to the realities of the different territories and consumer demand needs. The Product Manual is divided into 5 subsystems, three of which are applicable to the Wine Route Management Body and two to the member companies (Figure 5).

Figure 5.
Wine Routes Spain Tourism System



Source: The Wine Routes of Spain Tourist Product Manual.

Subsystem 1: Planning and Management

The legal body supporting the “Wine Routes” product must have a managing entity. If it is an Association, it would be the Board of Directors, with its different positions; if it is a Consortium, the Board of Trustees / Directors, in which the different stakeholders in the area are represented and which carries out the necessary planning and product management activities. The planning and management subsystem includes all the organizational aspects of the route as a tourism product. The main components are the “Annual Competitiveness and Sustainability Action Plan”, awareness campaigns, the Training and Professionalization plan, the Quality System, the Tourism Observatory - Scorecard, with the main tourist indicators of the destination, and the Managing, Representative and Participatory Body.



Subsystem 2: Destination

The geographical area through which a “Tourist Route” passes represents a destination, which must offer the infrastructure, services and conditions of enjoyment expected by visitors. The “Destination subsystem” structures all aspects related to the territory and its resources as the basis of the Wine Routes tourism product. These include infrastructure, signage, management of tourist resources related to wine culture and measures to enhance its value and the environment, too, and is obliged to minimize the environmental impact of tourist activity.

Subsystem 3: Promotion and Marketing

The “Wine Route” must have a promotion and marketing plan, and the activities carried out must respond to the needs of consumer demand. The Promotion and Marketing Subsystem aims to define the objectives, the strategy and the action programs to properly promote and market the Wine Route. The components are the Marketing and Commercialization Plan to identify target audiences and product, market and price strategies etc., and it includes a portfolio, customer relations model; corporate image and brand, promotional material and information, mainly brochure and tourist website; after-sales service and customer loyalty and reputation management.

Subsystem 4: Tourism Services

Tourists must have a sufficient range of tourist services and these must have a specific specialization and theming to respond to conditions that ensure the enhancement of the “Wine Routes” product. The tourist services subsystem aims to coordinate and adapt existing tourist services to the new needs of the Wine Route consumer demand. These services are accommodation, restaurants, bars, receiving agencies, guides, transportation, etc.

Subsystem 5: Oenology

This subsystem includes all activities and services related to oenology that make up the basic nucleus of the tourism product. In this case, the wine industry must respond to the adaptation to tourism and guarantee a satisfactory wine tourism experience. It includes wineries, museums, shops, tasting centres, etc.

Additionally, the Wine Routes of Spain Product Manual is the reference standard governing the biennial audits of each wine route, The Wine Routes of Spain Management Committee determines whether a certain destination is granted, or keeps, the certification, based on the results obtained.



5. The Wine Routes of Spain Product Club

The Wine Routes of Spain Product Club is the reference product club in Spain thanks to the work carried out over two decades by ACEVIN and the different Wine Routes themselves. The support of the Ministry of Industry, Trade and Tourism together with the Ministry of Agriculture, Fisheries and Food, has made it possible to create the different wine routes in accordance with the Product Manual and consolidate the 'Ruta del Vino de España' brand by means of a system of self-regulation and audits, in which each route is audited externally. Due to this, the project is a national and international benchmark in oenotourism or wine tourism, as shown by the growing interest that the tourism product arouses among stakeholders in the tourism sector and other destinations that want to be part of it and are joining the project.

The Club is currently focussing its efforts on maintaining, consolidating and supporting the promotion and marketing of the Wine Routes of Spain. It is putting a major digital marketing strategy into place in which a series of actions are contemplated, such as the development of a website to include the entire wine tourism offer of the country with quality content and a social media action plan reinforced with various promotional campaigns throughout the year. The Club has a Tourism Observatory that shows the evolution of wine tourism in our country, both from the perspective of supply and that of demand, analysing the profile of wine tourists and their level of spending. With all these factors, the Wine Routes of Spain has become a model its own right that has helped to promote wine tourism in the country and which is being successfully implemented in a large number of the denominations of origin and wine-growing areas. It is based on quality, public-private cooperation, sustainability and territorial balance.

It is a true tourist product, since it is able to articulate a thematic product recognized throughout Spain, combining all the resources and services of interest using wine culture as a common thread, creating tourism-oriented proposals and an experiential product which is highly valued by consumers. It is also aimed at target audience with high purchasing power, which spend well above the average. It is a sustainable tourism product, since it is created from the different resources present in each territory, from wine with a designation of origin, but also from local gastronomy, traditions and cultural manifestations, its heritage, the people and which enhance the value of the landscape and all its natural heritage. It is also an example of tourism governance, cooperation and networking, creating tourism management entities in destinations that bring together all stakeholders (designations of origin, wineries, accommodation, restaurants, shops, activity companies, ...). All of them constitute and articulate a tourism governance system which works strategically, with action plans and, in the same direction.

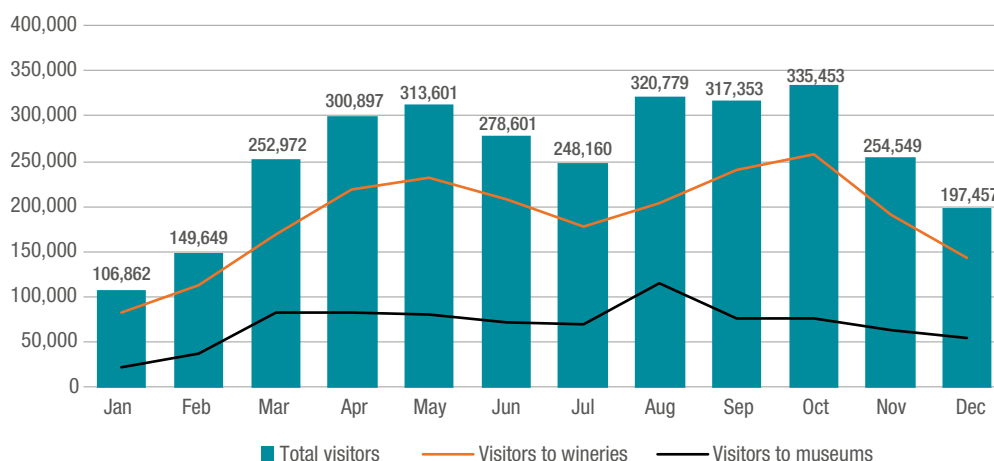
For all these reasons, Wine Routes of Spain contributes to the territorial balance and responds perfectly to the need to diversify the country's tourism model since it creates new tourism proposals that contribute to highlighting all heritage, especially in inland areas. Thanks to the Wine Routes, territories that have not traditionally been tourist oriented, are nowadays becoming competitive destinations, generating wealth, jobs and entrepreneurship opportunities, while helping the locals take pride in belonging to their communities. In this way, wine tourism is behaving as a true driving force of development in wine-growing areas, contributing to the beautification of towns, major investments in wineries, the creation of museums, of companies, the organisation of events, the improvement of tourism companies, the



training of professionals and many other factors lead to an ongoing commitment to wine tourism. It is a de-seasonalising tourism product since, although it can be enjoyed all year round, its peak demands are during the autumn (coinciding with the grape harvest period) and the spring (Graph 3).

Graph 3.

Monthly distribution of visitors to the Wine Routes of Spain (2019)

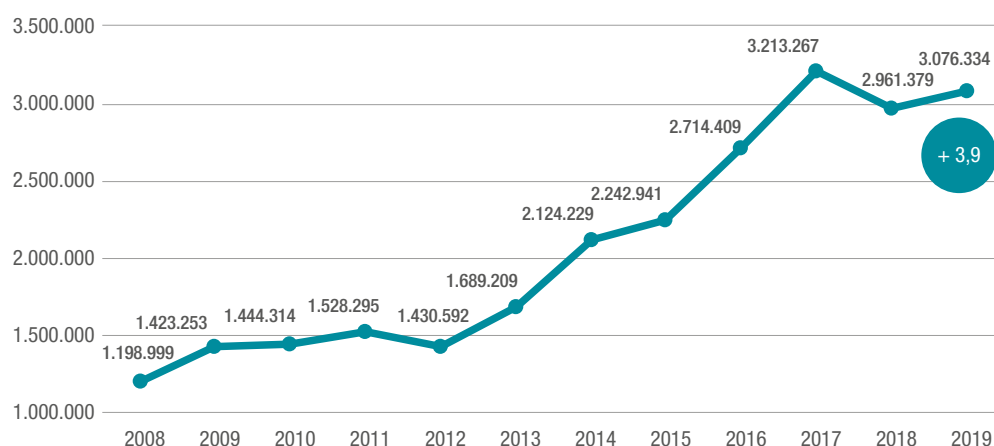


Source: Tourist Observatory Wine Routes of Spain (2020).

An attribute that reinforces our idea of Smart Tourist Destinations, Wine Routes of Spain has its own Tourism Observatory, which provides objective data on the importance of the activity. Since 2008, this Product Club and wine tourism have been growing non-stop, and it has also done so at a good pace, some years with growth figures even going into double digits (Graph 4).

Graph 4.

Evolution of the number of visitors to wineries and museums of the Wine Routes of Spain (2008-2019)



Source: Wine Routes of Spain Tourism Observatory (2020).



6. Conclusions

Gastronomic tourism models are, generally speaking, in the consolidation phase. 'Saborea España' (Tasting Spain), for example, is a project that could be considered successful in terms of communication or destination promotion, but which nevertheless has significant shortcomings in relation to the creation of a tourism product. On the contrary, Wine Routes of Spain is a model that has helped to promote wine tourism in the country, which has gradually improved and is being successfully implemented in a large number of the denominations of origin, thanks to a commitment to quality, public-private cooperation, sustainability and territorial balance.

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Wine Tourism and the New Architecture of Wine in Spain

María José Yravedra

Doctor of Architecture. Master in Viticulture & Oenology
Bodega Ronsel do Sil (Spain)

Carmen Pérez-Somarriba Yravedra

Sustainable architecture and wine landscapes
Bodega Ronsel do Sil (Spain)

Abstract

The “architecture of wine” is an intrinsic part of cultural heritage in the diversity of landscapes formed over the centuries, establishing synergies between man and nature. Since the end of the 19th century, and especially in recent years, the world of wine has seen a proliferation in the construction of new wineries and ancillary buildings (museums, hotels, fairgrounds, etc.), revealing the growing development of wine tourism, in its many facets, as a sensory experience encompassing landscape, architecture and the enjoyment of native varieties through the tasting of their wines.

This chapter presents readers with a vision of the innovation of the different “wine architectures” in their various climates and landscapes, and the functional requirements that encompass their projects and facilities for the winemaking and aging process. The rural world has been valorised by the architecture of the new wineries, which are symbols of culture and art. The analysis focuses on some cases of wine landscapes and wine architecture in Spain which are of special interest to visit and to get to know. Additionally, it offers a reflection on new wine tourism during the current epidemiological crisis.

1. Introduction

Connecting the varietal with how wine architecture works is a fictional likeness. That is why we can speak of correlations between the configuration of project design decisions regarding buildings and vineyards.



There are analogies between the plant world and contemporary architecture, in which the processes of a vine, during photosynthesis, can resemble small sustainable autonomous buildings. Both systems, that of the vine and the building, as they are fixed, static features, use sophisticated anchoring and structural mechanisms, and need to make the best use of nature's resources through the interpretation of climatic data for self-regulation in pursuit of a comfort system.

Variable bioclimatic indices and their adaptation to conduction and irrigation systems constitute the science of viticulture. The historical heritage of wine architecture for the production and conservation of wine has been adapted to the climate of each location and to its local materials. Architecture complies with its task of providing a "natural space", by means of biodynamic design strategies, due to the requirement of a space endowed with an atmosphere which favours the aging of wine.

Agriculture generates landscapes and an inhabited space of towns and cities, with territorial, political and anthropomorphic dimensions. Designing architecture together with the domesticated nature of a vineyard is to integrate the climate with wine landscapes, under the same horizon line, in accordance with functional and ecological rules.

If a winery's main objective is the production and aging of the wine, a principle based on a functionality that could be called "industrial", it has been complemented in recent years with an "aesthetic" trend, in which the image of the winery has become a fundamental priority. The idea that a good image "sells" is already part of the world of wine, and wine tourism is a key factor in this new model.

We are currently in the midst of a water and energy crisis and see how new wineries are being designed using ecologically sustainable criteria, an objective that ancestral wineries had already achieved centuries before. It was achieved by using construction techniques based on natural architectural strategies which enable the regulation of adequate hygrothermal conditions according to the bioclimatic needs of each wine, inside the aging cellars. These technical aspects, together with the forms defined by functional production and traditional historical factors, led each region to adopt a pluralistic image of wineries, in accordance with the needs of the wine made there. Building for wine has become synonymous with great media prestige, and an attraction for wine tourism. Winemakers have become the new patrons of the arts, and their architecture a symbol of prestige.

2. Wine Tourism and Wine Architecture in Spain

2.1. *Wine Landscapes*

In Spain, wine architecture landscapes roll between castles, monasteries, small artisanal vernacular wineries, between vineyards, rivers and valleys, all of which are a synthesis of Christian, Jewish and Arab cultures. There is a consolidated heritage of prototypes inherent to a symbiosis between the wine made in each region and its architecture. Sensitive construction, which helps to enhance the organoleptic characteristics of its produce through its materials. It turns out that the seductive idea of the union between architecture and the constructed nature of a vineyard combine, as spaces for culture.



The vine comes first, the varietal, the grouping of which makes up the vineyard, and all this goes to make up the different characteristic landscapes in each region, adapted to the orography, soils, orientations, slopes, hydrography, autochthonous varieties and diverse tillage techniques and cultures. Wine landscapes in Spain are numerous and diverse, and it would be feasible to give them their own specific typology. The following series of pictures has been selected as an example of wine landscapes in different Spanish wine-growing regions: Lanzarote (Figure 1), Ribeira Sacra (Figure 2), Poblelet (Figure 3) and La Rioja (Figure 4).

Figure 1.
Wine-growing landscape in Lanzarote



Source: María José Yravedra.



Figure 2.
Wine-growing landscape in the Ribeira Sacra



Source: María José Yravedra.

Figure 3.
Wine-growing landscape in Poblet



Source: María José Yravedra.



Figure 4.
Wine-growing landscape in La Rioja



Source: María José Yravedra.

2.2. Traditional Wineries

When talking about the new wine architecture, or any other field, one tends to consider what is new as the latest, the best and the most advanced, and from a technological point of view it is undoubtedly so. However, traditional and indigenous architecture have intrinsic characteristics that must be studied and analysed in order to learn from them and to try to improve on them with the infinite possibilities offered by new technologies. These anonymous constructions, the simple design of which generally blended them in with the landscape, were devoid of all artifice.

The world of wine is no stranger to this reflection. Ancient, centuries-old wine cellars show how hygrothermal conditioning was solved (Figures 5 and 6). In the case of the “calaos” in La Rioja, burying the winery and maintaining small vents to the outside, to always protect the wine from adverse weather conditions. In this section, a special mention will be made of the “wise old winegrowers”, masters of vine techniques, with artisanal procedures, regardless of the inclement weather, or the time dedicated to these tasks, since it is thanks to them that a large part of the Spain’s viticultural heritage has been preserved to this day.



Figure 5.
Wineries in Ribera del Duero



Source: María José Yravedra.

Figure 6.
Stone hut in La Mancha. Ciudad Real



Source: María José Yravedra.

The image of a winery next to a vineyard has remained almost unchanged since the existence of humankind. This binomial vineyard-winery, nature-architecture, has been common to all times, cultures and civilizations in Spain, from the Phoenician constructions to the wine 'cellas' of the Roman units of production as described in Columella's treatises on agriculture and Vitruvius' treatise on architecture. Wine archaeology already followed functional construction guidelines for the different phases of production and conservation.

2.3. Monastic Wineries

Medieval monasteries were true hubs of culture at every level, in which agriculture and the cultivation of the vine were especially important. The wine, not only from the liturgical aspect but also for nutrition and health, was part of daily monastic life and that of the adjacent towns. The winery was located in the group or western gallery of the cloister of the converts' building, attached to the refectory, on the underground floor of the cellar, following the construction specification described in the 'Regla' (Regulations) of Cistercian abbeys. A good example is the Poblet Monastery winery in Tarragona (Figure 7).

Figure 7.
 Poblet Monastery Winery



Source: María José Yravedra.

It must be noted that many medieval monasteries have been abandoned, are unused or in a poor state of repair, which is undoubtedly a significant loss for historical heritage (Figure 8). Other monasteries, such as Santo Estevo de Ribas de Sil, have been renovated, restored and converted into National Paradors (State-run hotels) (Figure 9), which has been a great boost to the revitalization of that part of the Ribeira Sacra district, deep in the heart of rural Galicia.



Figure 8.
San Paio Wineries, Ourense



Source: María José Yravedra.

Figure 9.
Monasterio de Santo Estevo, Ourense



Source: María José Yravedra.



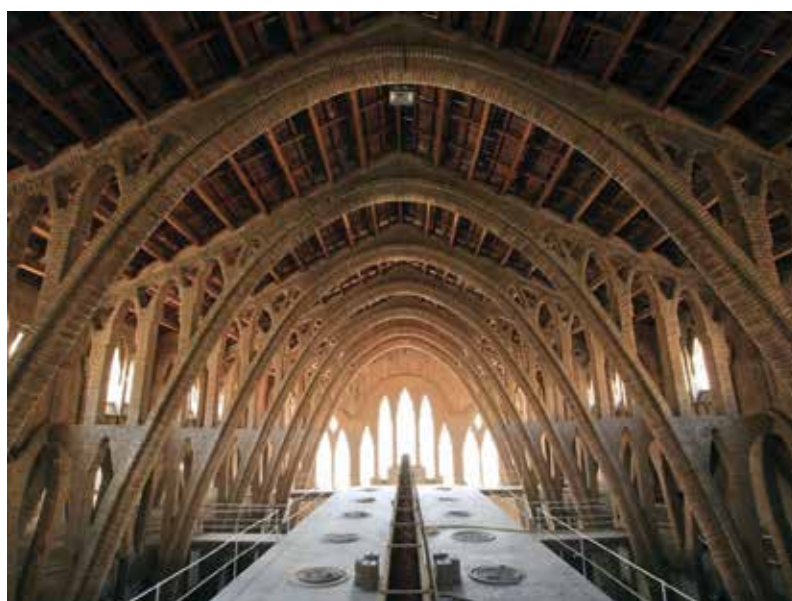
2.4. Cooperative Wineries

In the last third of the 19th century, coinciding with the industrial revolution that had begun decades before, and the socioeconomic movements derived from the increase in production and commercial activity, a series of wine cooperatives emerged in certain areas such as the Conca de Barberá, which sought to optimize the production and marketing processes of the region's wines.

In line with this movement, wineries in which the modernist architecture of César Martinell, among other architects, acquired a notable role, were built. When the technique of brickwork masonry was added to the need for space in the fermentation cellar, the resulting use of parabolic arches and partitioned vaults is certainly spectacular, creating the so-called “wine cathedrals” (Figure 10).

Figure 10.

Conca de Barberá Cooperative Wineries



Source: María José Yravedra.



2.5. Show Business Wineries

The new architecture of wine, that is the architecture of wineries over the last thirty years, is characterized by providing a service to new production and winemaking systems, with specific equipment and control systems for each task. Wineries have begun to consider wine tourism in their projects as a new form of advertising, marketing and commercialization of wines, on a large scale in many cases due to the number of visitors.

That is why it is important to differentiate the wine route from the visitors' route, when designing a winery, right from the reception of the grapes to the shipping of the bottles, passing through the processes of; fermentation, aging, bottling, labelling and other operations in winery, so that there is no interference between both routes.

Added to this is the model's media impact, which has encouraged prestigious architects to design wineries (Figures 11, 12 and 13). Along with them there are many good professionals, experts in wine architecture, who have contributed interesting works of architecture to this sector.

Facing these wineries with such media coverage, in which image prevails over other functional concepts, there are many other wineries, designed by architects who are experts in wine architecture, which highlight the Vitruvian trilogy of *firmitas, utilitas et venustas*, Sturdiness, utility and beauty (Figure 14).

Figure 11.

Protos Winery. Architect: Richard Rogers



Source: María José Yravedra.



Figure 12.

Portia Winery. Architect: Norman Foster



Source: María José Yravedra.

Figure 13.

Ysios Winery. Architect: Santiago Calatrava



Source: María José Yravedra.

**Figure 14.**

Ronsel do Sil Winery. DO Ribeira Sacra (Ourense)



Source: María José Yravedra.

2.6. Wine Cities

Wineries are usually isolated constructions, in the middle of vineyards, adapted to the landscape. However, there are real “wine cities”, or large wine-making complexes, where the proliferation of wineries, often built at different times in history, creates an urban agglomeration adapted to wine: winery buildings, trellised streets, ancillary buildings, etc. Cases in point include Jerez de la Frontera, Sanlúcar de Barrameda, Haro, the González Byass wineries in Jerez (Figure 15), and even the Codorníu Wineries, in Sant Sadurní de Noia (Figure 16), with underground galleries measuring several kilometres long, on five levels.

Figure 15.

Gonzalez Byass Wine Complex. Jerez de la Frontera



Source: María José Yravedra.



Figure 16.

Codorníu Wine Complex. San Sadurní de Noia



Source: María José Yravedra.

2.7. Wine Museums

The need to communicate and spread wine culture has led to wine museums being established in many parts of Spain, where everything used in vineyards and in wineries is showcased (Figures 17 and 18). There is an ever-greater demand on the part of wine tourists for this type of exhibition space, where the products and activities of each region are displayed.

Figure 17.

Dinastía Vivanco Museum



Source: María José Yravedra.



Figure 18.
Vino de Galicia Museum



Source: María José Yravedra.

2.8. Other Wine-related Spaces

Visits to wineries are not the only activities demand by wine tourism. The world of wine is infinite, and parallel activities are becoming increasingly numerous: Hotels (Figure 19), shops and specialized tasting spaces (Figure 20) and even administrative buildings such as Regulatory Council offices (Figure 21) and others constructions where wine takes pride of place.

Figure 19.
Marqués de Riscal Hotel



Source: María José Yravedra.



Figure 20.
Viña Tondonia Shop and Tasting Room



Source: María José Yravedra.

Figure 21.
Headquarters of the Ribera del Duero Regulatory Council



Source: María José Yravedra.



3. Architecture, Efficiency and Sustainability

Respect for the environment is already, or should be, part of our lifestyle. In the field of construction there are rules, included in the Technical Building Code, which require issues such as energy efficiency, sustainability and proper water and waste management to be taken into account in projects for both new construction and work on existing buildings.

If these problems were already taken into account by traditional winery architecture and were solved with “popular wisdom”, albeit forcibly, –using underground galleries and cellars, enclosures with high thermal inertia, high natural vents among other examples–, new architecture must also deal with these issues, if possible in an even better way, by taking advantage of the possibilities construction offers nowadays. (Figure 22).

Figure 22.

Chandón Wineries. Barcelona (energy efficiency and water management)



Source: María José Yravedra.

4. New Types of Post-COVID-19 Wine Tourism

If we thought that we had seen it all, and that few things could take us by surprise, we are now experiencing a new situation that is modifying our lives in every way: A pandemic. COVID 19 has forced us to confine ourselves in our homes, to limit journeys and trips, to reduce capacity in spaces and premises, etc., in short, to change our way of life. For some time now, and in many cases, our windows to the world have been mobile phone and computer screens. We have had no choice but to telecommute, attend meetings, shop and so many other new activities, from home.

The new types of wine tourism will have to adapt temporarily to this pandemic situation, by means of virtual tastings and visits to wineries “live” via the Web. While we are typing or we are opposite computer, we will have a drink, according to the new health regulations, leaving raucous traditions and human contact behind.

“Traditional” wine tourism activities have already changed, and wineries will have to make an effort to innovate and create to show the world their wines, their landscape, their architecture and their sensations, not face-to-face but from a safe distance. Accustomed to experiencing reality, we will



have to live virtually, and continue walking naturally through wine landscapes and architecture. What will never change is wine culture and its ability to convey emotions and, above all, the pleasure of sharing a glass of wine as a communicator and social conversationalist.

In the Middle Ages culture was communicated and spread on pilgrimages, in jealously guarded manuscripts in abbeys and monasteries and by oral tradition. Now everything is done via mobile phones and on social networks. Another concept of space and time is arising with the diffusion of wine culture, which will undoubtedly affect architectural design decisions to make virtual wine tourism known.

Now that our senses have been somewhat diminished by so much hydro-alcohol and disinfectant, our sense of smell (where the greatest sensitivity of humankind lies) is one of the main tell-tale signs to detect whether we are free from contagion by COVID 19. This sense of smell can be nurtured by aroma-tasting grapevine varieties, with their characteristics, quality and geographical origin, as a multifaceted product by means of the measured tasting and organoleptic examination of wine.

During the harsh months of global confinement, there has been an increase in society's interest in sensory knowledge through massive virtual tastings, in which the 'terroirs', the grape varieties and the personal stories of wine growers and artisans are described. We hope that this health crisis is over as soon as possible, and that we may all draw a positive lesson from this situation.

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Culture and Wine Tourism

Film, Literature and Travel in the World of Jerez

José Luis Jiménez García

Real Academia San Dionisio de Ciencias, Artes y Letras

Abstract

Wine, culture and tourism is a combination which has attracted little attention. The reason for this is that tourism, and particularly wine tourism, is a relatively recent phenomenon. The history of wine, however, dates back thousands of years; it is rooted in our most ancient traditions and it represents a shared cultural heritage for communities that have long cultivated the vine.

Recent years have seen the way we spend our leisure time diversify and one option now open to us is to follow a cultural itinerary. The famous sherry producing region of Jerez can be considered a pioneer in many respects and this chapter aims to show the multitude of ways in which wine tourism can take advantage of the many celebrations of sherry afforded by literature and film, as well as the experiences of well-known travellers who have visited the area attracted by the reputation of its wines.

The knowledge and appreciation of this legacy is a source of inspiration which can help assist with the challenges faced by wine tourism in the 21st century. At the forefront of all of them must be the COVID-19 pandemic, the short- and medium-term consequences of which can only be guessed at.

"Ah, the beautiful things I have seen which other men have not"
Somerset Maugham (1935 edition)

"Sherry, sherry, sherry. By my troth he makes me merry"
Ben Jonson (1614 edition)¹.

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1 Words said by the character Cokes in act V, scene IIII.



1. Introduction: From Illustrious Travellers to Modern Day Wine Tourism Leadership

The history of wine-production in the Jerez region dates back thousands of years. This was confirmed by the professor of ancient history Don Diego Ruiz Mata when he pointed out that “What we want to now do is disinter this tradition, properly appreciate it and make it a symbol of the Jerez region and of its wine, recognising it as the world’s oldest and most complete wine-producer”². The professor’s investigations have, in addition to unearthing the great Phoenician wine cellar near the Doña Blanca –settlement in the Sierra de San Cristóbal and not far from the town of El Puerto de Santa María– enabled the discovery of three complete temples dedicated to the cult of wine.

The various towns, that over time were established in this part of Andalusia, maintained their tradition of grape cultivation until they were producing the exceptional and internationally renowned wine that we know today. The most significant period for the region was between the end of the 18th century and the entire 19th century since it is during this period that the region’s traditional winegrowing was transformed into the modern vintner agroindustry that it is today.

During these years accelerated development changed the face of the town (Aroca, 2007). These changes were brought about by a burgeoning middle class that made alliances with the old aristocratic families as well as by a considerable and active expatriate community who settled in the area drawn by the wine industry (Bejarano, 2004).

The modernisation of Jerez took place in leaps and bounds throughout the whole of the 19th century. Wealth generated by the wine industry brought important innovation and advances to the town way earlier than it did to the other towns in the province. In 1854 one of the first railways in Spain was opened along with a branch line to transport wines from the wineries to the docks in El Puerto de Santa María and Cádiz. Gas lighting was introduced in 1860; drinking water from the Tempul spring was piped to the town in 1869; the telephone arrived in 1889 and the Jerez Electricity Company was established in 1891.

Also, we must not forget the essential contribution to the town’s growth of “the hundreds of thousands of workers whose effort and skill produced wines that –over the years– became central to the identity of the town and the surrounding lands that produced them” (Caro, 1995). At the end of the 18th century the flow of travellers to the province of Cadiz was sporadic, however the War of Independence revealed a hitherto undiscovered Andalusia to Romantic Europe which became fascinated by its exotic traditions, wild landscape and handsome buildings, a reflection of its grand past (Ramos and Maldonado, 2020).

At the beginning of the 19th century the young English writer, Lord Byron, helped change perceptions of adventure-hungry pioneers embarking on the Grand Tour (Ramos and Maldonado, 2020). During his whistle-stop tour of Spain, he stayed in Jerez and was hosted by a distant relative, the winemaker

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2 Cala, A (2020): “Un templo llamado bodega”; in *Diario de Jerez*, 29th March 2020 (26th July 2020); in https://www.diariodejerez.es/jerez/templo-llamado-bodega_0_1447955746.html.



Jacobo Arturo Gordon Smythe. He mentioned the stay to his mother in a letter from Gibraltar dated the 11th August 1809: “I met a great merchant, a Mr Gordon of Scotland who was extremely polite and favoured me with the inspection of his vaults and cellars, so that I quaffed at the fountain head...” (Kent, 1983; pp.47-48).

It was another English writer, William Somerset Maugham, who –at the end of the 19th century and after spending some months travelling around Andalusia– wrote this description of the town: “Jerez the White is, of course, the home of sherry and the whole town is given over to the preparation of the grateful juice. The air is impregnated with a rich smell, the sun shines down on Jerez; and its cleanliness, its prosperity, are a rebuke to harsh voiced contenders of the grape” (Somerset Maugham, ed. 1935; p. 215).

Interest in sherry and the wineries that produced it gradually increased and even came to the attention of the country’s dignitaries³. The flow of “tourists” visiting Jerez has continued unabated from that point on thanks to safer and quicker sea crossings; the improvement of the inland road network, the development of the railway network and, in 1975, the opening of Cádiz airport, the region’s only airport apart from that of Gibraltar.

This brief introduction brings us to the current day. A plethora of organisations contribute to the development and promotion of wine tourism by means of a range of events many of which are organised in collaboration with the University of Cádiz. The list of bodies involved includes the Regulating Council of the Jerez-Xérès-Sherry, Manzanilla de Sanlúcar and Sherry Vinegar (established as early as 1933) denominations of origin; the various Jerez, Sanlúcar and El Puerto de Santa María wineries as well as these towns’ own town councils have been carrying out a series of actions, in many cases, with the collaboration of the University of Cádiz, favouring the development and promotion of wine tourism.

Since the incorporation of Jerez into ACEVIN, the Spanish Wine Towns Association, and its tourist product Wine Routes of Spain, the Sherry Region Wine and Brandy Route has become the most visited in Spain with a total number of 582,351 visitors in 2018⁴. This placed Jerez at the top of the wine tourism league tables for the third year in a row. 95 % of tourists in the Jerez area visited one of its wineries and Spanish tourists (340,480) outnumbered by far tourists from other countries (241,871). Conversely, there was a marked fall in visitor numbers to the wine museums whose 28,565 visitors saw them to only 7th place in the rankings⁵.

As regards wine tourism’s economic impact, according to ACEVIN, the average entry price charged by wineries in the Jerez area (about 12.82 euros) puts them at the top of the rankings. However, they are far from achieving this when visitor spend is considered: this is 16.36 euros, substantially lower than the 34-46 euro spend range that other wine routes achieve. In total, the income of the Jerez

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3 In 1848 the Duke and Duchess of Montpensier visited the Domecq winery; in 1862 it was the turn of Queen Isabel II, guest of honour of the Manuel María González Ángel and Patricio Garvey wineries; Queen Isabel’s son visited on two occasions, in 1877 and 1882, and was shown around the premises of what are now the González-Byass and Marqués de Misa wineries. The Spanish monarch Alfonso XIII also visited the town in 1904 and 1915 and was followed by Queen Victoria Eugenia in 1920 who was hosted by the owners of the Mérito and Misa wineries.

4 Report on visitors to wineries and wine museums in the Spain Wine Routes association, 2018. Dinamiza Asesores, for ACEVIN and Wine Routes of Spain.

5 The Mystery of Sherry Museum (Museo del Misterio del Jerez), opened in 2005, has not been so active in recent years and is not currently a member of the Wine Museums of Spain Association.



area wineries in 2018 amounted to 16 million euros; 6.8 million came from entry tickets and 9 million from product sales.

For its part, the Sherry Region Wine and Brandy Route is developing an interesting initiative called “The Sherry Vineyard Districts”. This is a project that is aiming to showcase the rural winemaking areas that surround Jerez and to ensure that the region’s wine tourism takes full advantage of its natural environment and landscape along with the cultural, historic and gastronomic assets associated with their vineyards (Romero, 2020)⁶.

The objective of the initiative is to create a unique and authentic product that is true to the history and culture of the Sherry Vineyard Districts and that provides an alternative to urban wine tourism. An offer has been designed that revolves around three main itineraries that are, in turn, located in three of the Jerez region’s historic districts: Carrascal, Macharnudo and Balbaína. Now that the initial design phase of this new tourism offer is complete, 2020 has seen the start of the second phase. During this phase those involved are drawing up a “Sherry Vineyard Districts” Tourism Product Development Plan which includes a Sustainability Plan and requires the drafting of Product Manuals for the various agents that will be taking part in the initiative.

In this way, the “Sherry Vineyard Districts” project came into being as a sustainable and joint tourist and leisure proposal, enabling the enjoyment of the vineyard environment in all its aspects, integrating the existing tourist attractions in the area, as well as encouraging new opportunities for entrepreneurship and the creation of services. Diversification of the region’s wine tourism offering will, in turn, bring new income to the rural areas, specifically the “Sherry Vineyard Districts”, linked to the terroirs that have been of such historic importance to the region.

This project is the latest in a long run of pioneering and innovative initiatives that have taken place over the years of Sherry production, the main ones are mentioned below:

- In 1948: The Grape Harvest Festival was created, the first of its kind in Spain. It was followed in 1998 by the inaugural International Exhibition of Fine and Liqueur Wines (Vinoble), a biennial event organised in order to raise the profile of these great wines at the international wine fairs, where they were largely unnoticed, dominated by the younger commercial wine varieties⁷.
- In 2007: The First International Wine Tourism Congress was held, coordinated by Cádiz University.
- Seven years later, in 2014, Jerez was designated European Wine Capital⁸, by the 17th Recevin (European Wine Town Network) General Assembly and Jerez’s European links are further strengthened each year when the European Wine Tourism Day is celebrated; the 12th was held this year, 2020.

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6 More information is available on the Dinamiza Asesores website.

7 The outbreak of COVID-19 has disrupted the 2020 Congress and it has been postponed until the 30th May to the 1st June 2021.

8 López & Arcila (2016): carried out a multidisciplinary analysis of the repercussions of the Covid crisis for Jerez and its surrounding area.



- Of the many wine tourism events that have been held by the region's wineries⁹, the González Byass offer stands out: in 2020 it reached the 18th position in the list of the world's top 50 wineries selected by the World's Best Vineyards organisation and it is also Europe's most visited winery. The González Byass house has also established a foundation charged with preserving its extensive documentary archive and making it available to scholars and researchers. Lastly, in the middle of July 2020 the house opened an enchanting boutique hotel that occupies part of the winery's own 19th century buildings.
- Another unique winery is 'Bodegas Tradición', it is in the historical centre of the city, which is also a Monumental Historic Site. It is unique because it makes its exclusive old wines using the old artisanal procedures¹⁰. In addition, its owner, Helena Rivero, has an important collection of paintings and a collection of written and graphic documents of great value to learn about the history of Jerez wines.
- Lastly, in El Puerto de Santa María port, the wineries of the Grupo Osborne (founded in 1772) have on display a permanent exhibition dedicated to its popular black bull emblem; it is called the Toro Gallery and it opened to the public in 2016.

2. Jerez on Film: from Documentaries to Works of Fiction

The film world has special links with Jerez: whether using its scenery as a beautiful backdrop for filming or when the region is the protagonist of films and documentaries (Sánchez, 2007). In 1999, with the support of the Andalucía Film Commission, Jerez Council opened an office to assist the audio-visual sector when searching for locations. Jerez provided an ideal natural setting and an administrative centre for these endeavours.

For the first 13 years of its existence the Jerez Film Commission, in which the author oversaw location coordination and scouting, facilitated the shooting of a number of films and programmes for television channels. An example was the shooting of the documentary *Las Catedrales del Vino* by the director Eterio Ortega in 2011.

After two years of inactivity due to organisational issues, this municipal service was relaunched with the new name Jerez Film Office¹¹, and proceeded to attract sizeable productions such as *El verano que vivimos* (2019) (Figure 1), a feature-length film directed by Carlos Sedes and, in the same year, the television adaptation of *La templanza*, the novel by María Dueña, part of which takes place in Jerez's 19th century winery district.

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9 *Diario de Jerez*, 13th March 2017 (26th July 2020); in https://www.diariodejerez.es/jerez/enoturismo-despunta-visitas-bodegas_0_1117088661.html.

10 "Bodegas Tradición" is the only winery in Jerez that specialises in aged sherry with the VOS (Vinum Optimum Signatum or Very Old Sherry, over 20 years old) and VORS (Vinum Optimum Rare Signatum or Very Old Rare Sherry, over 30 years old) accreditations, both awarded by the Regulating Council.

11 https://www.jerez.es/nc/webs_municipales/filmoffice/.



Figure 1.
Publicity poster for the feature-length film “El verano que vivimos”



Source: Author's archive.

The value of these two productions to the local economy is thought to exceed 2.5 million euros. Many local businesses benefited: hotels, restaurants, vehicle and service hire companies, and companies hiring extras. It is difficult to quantify the impact that such productions can have on promoting the town of Jerez and its wineries, but doubtless images of the town appearing in film and on television and the internet in a domestic setting are highly profitable.

When considering this, we should bear in mind the impact of Alexander Payne's 2004 *Sideways*, shot among the wineries of the Napa Valley. Equally, in 2012 on referring to the relation between cinema and wine tourism Martínez Puche y Jover said that "... the 7th art has represented and recreated wine culture with varying levels of rigour, accuracy and narrative quality but the global projection that it provides is unquestionable. Film can therefore provide a persuasive discourse that can promote wine tourism experiences and destinations and influence the behaviour of spectators, transforming them into potential buyers and, why not, even tourists".

Jerez's links with film are not new since it has provided a backdrop for productions such as *Wine Cellars* (1929)¹², *El duende de Jerez* (1953) and *Fine Gold* (1989). These links are further proven by the long list of autographs on the wineries' casks left by stars of the big screen such as Cantinflas, Carlos Saura, Peter O'Toole, Roger Moore, Steven Spielberg, Orson Welles, Esther Williams, Jean

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12 Free adaptation of Vicente Blasco Ibáñez's protest work published in 1905.

Cocteau, Charlton Heston, Cole Porter, Oliver Hardy, Rex Harrison, Bo Derek, John Derek, Mel Ferrer, Lola Flores, Miguel Ligero, Juanita Reina and Imanol Uribe, among others.

Another attraction of visiting the region's wineries is to wander among the rows of wine casks discovering who has signed the heads of these special barrels.

We should also add into the mix the film stars who are spotted in many films enjoying a glass of sherry (Jiménez, 2013), bringing to life the characters that they are portraying. Some of them showed this predilection off, as well as on, screen, such as Marilyn Monroe (Figure 2).

Figure 2.

Cover of the 4th edition of the Vinos de Jerez (Sherry Wines) magazine



Source: Author's archive.

Documentary film is a genre that has depicted the world of wine of Jerez; some documentaries are significant because of the year in which they were produced and others for their uniqueness. First in the list is a work that is considered to have been the first that shone a light on the world of sherry. It was titled *Making Sherry at Xeres* (1910), it was directed by Charles Urban but unfortunately no copies have survived. Second comes a detailed report titled *Banquete del II Congreso de Ciencias médicas*, shot in the Domecq buildings and vineyards in 1924, by the Madrid production company Vilaseca y Ledesma, and only one 54-minute copy on nitrate film survives¹³. Lastly, the two versions of *Jerez-Xérès-Sherry* (1942-1958) which were produced by the Marquis of Villa-Alcázar for the Ministry of Agriculture with the aim of promoting sherry and educating the viewing public.

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¹³ The author of this chapter was recognised for the recovery, preservation and digitalisation of this work and awarded the Heritage Prize in the competition organised by the 15th French Wine Video Festival held in Gruissan in 2008.



Some years later, in 1961, the American filmmaker Orson Welles came to Jerez intending to shoot one of the episodes of the *Nella Terra di don Chisciotte* series for the Italian RAI television channel; it was entitled *La Cantine di Jerez*. During his stay Welles visited the González Byass winery, where he signed a cask (Figure 3), and was entertained by the Marquis de Torresoto, who presented him with a Tio Pepe insignia and made him a member of the Tio Pepe Order, founded by this same eccentric winemaker.

Figure 3.

Orson Welles in Jerez (1961)



Source: Fundación González Byass Archive.

During the previous regime it was customary to send teams of NO-DO¹⁴ or state weekly newsreel staff to report on the wine harvest and the Grape Harvest Festival (Jiménez, 2020) or to produce more extensive reports such as *Entre viñedos* (1949).

This film tradition has continued in the second decade of the 21st century with significant productions. José Luis López Linares' film *Sherry & the Mystery of Palo Cortado* (2015) was shown at film festivals such as those of Málaga, Berlin, Tokyo and San Sebastián and Nonio Parejo's, *El jerez y los ingleses*

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¹⁴ NO-DO crews (an abbreviation of *Noticiario y Documentales*, or News and Documentaries) was a Franco regime weekly news service that was broadcast in Spanish cinemas between 1942 and 1981.



(2015), carried off the Arrels Prize at the Most Festival¹⁵. More recently, Jerez's Antonio Lobo was awarded the International Projection prize by the Most Festival jury for his film *The Wine, the World and Us* (2019).

3. Jerez in travel Literature: What They Saw in us and How They Drank it

As is the case with film, travel literature also has a long-standing link with the history of Jerez and its wines which have been a source of inspiration for writers and businessmen alike. Many notable members of these clans visited Jerez in the century and a half between the end of the 18th century and the first three decades of the 20th century. Most of them came in search of the famous wines.

Based on various documentary sources, the author estimates that these pioneers of literary wine tourism numbered about 200 and about 20 were women. English writers formed the largest group (60); followed by French (45); North American (28); German (15); Scottish (8); Irish (4); Italian (4); Russian (4) and 1 or 2 of other nationalities (Simó, 2013).

Although the number of literary travellers who visited Jerez (Clavijo, 2017) and nearby areas such as El Puerto de Santa María (Gómez, 2016) during this long period is open to debate, what is important is to glean from their testimonies information about the region's wine and people.

The French writer, Théophile Gautier, wrote a humorous account of a wine tasting that he attended in a Jerez winery in 1840: "After a comprehensive study of Jerez oenology, it proved difficult to return to our coach in manner sufficiently dignified to protect the reputation of the French vis-à-vis the Spanish" (Gautier, 1998:362).

In his description of a visit to Jerez on a hot August day in 1845, the Russian entrepreneur and writer, Vasili Petróvich Botkin, wrote: "From Cádiz one can see the Bay and the town of El Puerto de Santa María which lies an hour away. From there, Jerez lies a further hour away and it was there that I headed, eager to try its famous wine at its source" (Botkin, 2012; pp.235).

The English writer, Anthony Trollope, attracted for the same motive, wrote of his experience: "He carried me up by boat and railway to Xeres; ... after I had tasted some half a dozen different wines, and went through all the ordinary hospitalities" (Trollope, 1861).

The English traveller, Richard Ford, the famous author of two essential guides to travel in Spain in the mid-19th century, left this description in a Jerez winery: "Inside, the winery is deliciously cool and quiet and carefully locked away from the heat and the glare of the sun outside; here, thousands of casks are carefully piled up as the wine is prepared and aged" (Ford, 2008; pp. 152).

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¹⁵ The Most Festival (International Wine Film Festival) is held in Vilafranca del Penedés and is the only Spanish film festival that specialises in the theme of wine. This year it was held for the 10th time.



Even the highly-regarded father of Australian wine making, James Busby, passed through Jerez in 1831 with the intention of learning from the experience of the town's wine producers and, en route, picking up some vine specimens: "the town of Xeres, which is reckoned one of the richest, if not the very richest in Spain, in proportion to its population, and which owes its wealth entirely to the valuable wine produced in its vicinity (Busby, 1834, 2)¹⁶.

If we turn our attention to literary fiction, we can also find mention of the world of wine. Among those who have written on this topic Benito Pérez Galdós, the author who wrote most extensively and convincingly about the wines of Jerez, looms large (Figure 4). In one of his lesser-known stories, *Theros*, written in 1890, there is an ecstatic description of a winery: "We were in the most enormous winery ever seen, brim full of the finest and definitively the most delicate nectars known to man. On arrival in this corner of the globe no traveller can ever feel indifference. Before him, a glorious battlefield littered with the spoils of war, the mutilated limbs of sobriety vanquished and destroyed by its formidable enemy whose triumph is complete; its insolent pride has scattered the field with trophies. Millions of bright green vine shoots burst from the earth. Huge barrels are piled up or roll around like drunks who have lost their senses".

Another author worthy of mention is the iconic 19th century Spanish author Armando Palacio Valdés. Scattered throughout his novels are numerous references to sherry and manzanilla (Jiménez, 2018).

If we turn our attention to the 20th century, we cannot overlook the most controversial of all the literary works written about Jerez. We are referring to *La bodega* (1905) by the Valencian Vicente Blasco Ibáñez who spent several weeks in these parts to do some research in 1904. He took advantage of the opportunity to get to know some of the wineries and he left his signature on a González Byass cask that is preserved to this day.

More recently, the Jerez born writer and recipient of the Premio Cervantes, José Manuel Caballero Bonald, has drawn on his own life experience to write *Dos días de septiembre* (1962) and *La casa del padre* (1988). Lastly, *La templanza* (2015) is worth a mention, a best seller that has recently been adapted as a mini-series for television, due to be screened in 2020.

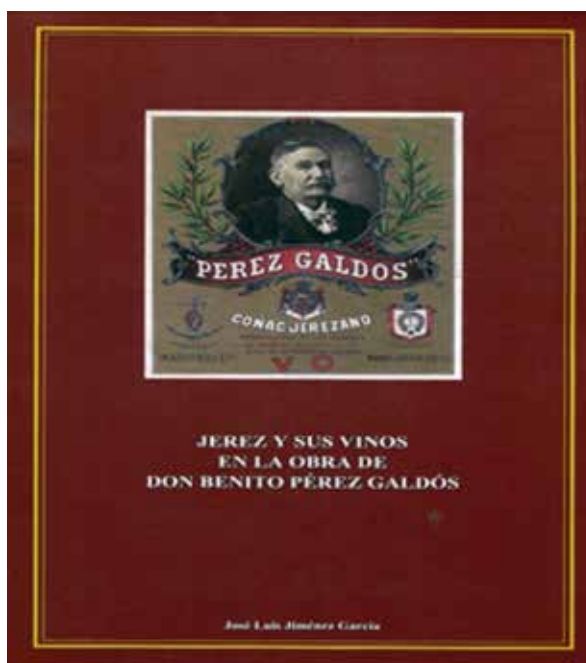
To conclude this section, the town of Jerez has paid homage over the years to those writers who have added to the reputation of the wine of Jerez in their writing by naming streets after them. Thus, visitors can wander along William Shakespeare Street; Poet Laureate Street; Ben Jonson Street; Charles Dickens Street and the streets named after Edgar Allan Poe (author of the horror story *El barril de amontillado* (Figure 5) and Benito Pérez Galdós.

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¹⁶ In the Bellavista winery complex in Jerez, Garvey holds a collection of labels from the 19th and 20th centuries. 8,000 of the 15,000 are on display. The winery is currently not open to visitors.



Figure 4.
Jerez and its wines in the book by Benito Pérez Galdós



Source: Author's archive.

Figure 5.
The sign for Edgar Allan Poe Street in Jerez



Source: Author's archive.



4. Conclusions

The cultural legacy of the wines of Jerez is immense and much of it springs from valuable contributions in film and literature along with other art forms. This rich history should serve as a source of inspiration to those who aim to use cultural means to build on the reputation of Jerez wines around the world. In the 21st century competition is fierce and new initiatives are needed to continue to capture the attention of consumers and to bring new tourists to the area.

In these challenging times we must champion the ability of people to adapt in the face of adversity; this process is made easier when citizens and their institutions coordinate their efforts. A positive mindset will enable the discovery of new strategies to overcome the challenges presented by Covid-19, strategies that should, among other things, ensure that planned changes are carried out and objectives achieved on time. Pertinent to this are the proposals contained in two papers published by Cádiz University –Wine tourism in the sherry region: an analysis from the suppliers' perspective (2010)– and from Málaga University, Wine culture as a draw for tourists visiting Andalusia (2017).

Of the most interesting initiatives, the following are worth highlighting:

- The application to declare the vineyards of the Jerez district a Unesco Cultural Landscape World Heritage site.
- Jerez's candidacy for European Capital of Culture in 2031.
- The consolidation of the success of International Sherry Week which has just been held for the 5th time.
- Roberto Amillo's project aimed at remedying the lack of a Wine Museum¹⁷, This collector from Rioja plans to bring together a growing collection of objects related to the production of Jerez wine and brandy.
- Conservation of the agricultural history and technology collection brought together by the historian Antonio Cabral and on display in the 'Santa Isabel de Hungría' Secondary School in Jerez.
- In the audio-visual field, the campaign to restore and study winery backgrounds and associated institutions in collaboration with the Andalusian Film Library.
- The creation of cultural itineraries that are designed around famous travellers' routes and films shot in the area.

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¹⁷ At the Bellavista winery complex in Jerez, Garvey keeps a collection of labels from the 19th and 20th centuries in his facilities, with more than 8,000 on display, out of a total of 15,000. It is currently closed to visitors.



- Continuation of the homage to William Shakespeare¹⁸, and recognition of the British institution of the Poet Laureate to promote interest in aficionados of literature and wine.
- The creation of a wine documentation and interpretation centre which brings together relevant parts of the archives currently held in the Jerez Municipal Archive and comprises documents produced by the DOC Regulating Council, Grape Harvest Festival, Antonio Cabral, Sandeman, etc.).

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¹⁸ Erected in 1956, Jerez is the only city in Spain that has a monument dedicated to William Shakespeare; and the Cineclub Popular de Jerez has been organizing a cultural event for 15 years as a tribute to the beautiful words that the famous English playwright dedicated to sherry in his works.



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Exceptional Wine Tourism Experiences in the Rioja DOCa –Denomination of Qualified Origin Region– (Spain)

Vicente Sotés

Universidad Politécnica de Madrid (Spain)

Abstract

The Rioja region has one of the most developed wine tourism industries of all the wine growing regions in the world, with ever-increasing numbers of visitors in recent years.

Situated in the upper reaches of the Ebro valley, it covers 3,425 km² and is surrounded by mountain ranges. Visitors to the region can enjoy its beautiful natural spaces; its rich, vibrant and longstanding cultural heritage, as the time and resources invested in its wineries go to show, along with its outstanding hotels and restaurants.

The region comprises three sub-areas: Rioja Alavesa, Rioja Alta and Rioja Oriental and each area boasts its own Wine Route. At the end of the 19th century Bordeaux techniques were adopted in the region and this was a significant moment for the sector. The evolution of this model has given rise to iconic wineries, the best exponents of which can be found in visits to the wineries of the Haro Station District and Marqués de Riscal in Elciego. In recent years, the Vivanco Museum of Wine Culture has become a global point of reference on the topic. All this enables this Spanish region to offer an unparalleled variety of exceptional wine tourism experiences.

1. The Development of Wine Tourism in Rioja

The profile and value of its wines makes the Rioja Denomination of Qualified Origin (hereinafter, the Rioja DOC) the principal Spanish winemaking region and wine tourism enjoys high-profile and success throughout the territory.



The Rioja DOC is in the north of the Iberian Peninsula. Its vineyards stretch into three different autonomous communities (Spanish administrative regions): La Rioja, Navarre, and the Basque Country (Figure 1).

Figure 1.
Map of the Rioja DOC*



* In red.

Source: Tonietto *et al.* (2012).

Documentary proof of vine cultivation in Rioja dates back more than two thousand years to the Roman age. In the Middle Ages, production was associated with monasteries and abbeys, cultural points of reference in Europe, and particularly the Yuso and Suso monasteries, both World Heritage Sites and the respective birthplaces of the Castilian and Basque languages. In the second half of the 19th century the principal winegrowing regions of Europe became blighted by phylloxera and consequently French wine producers arrived in Rioja to replenish their stocks and introduced Bordeaux production and aging techniques. This transformation vastly improved the quality of Rioja wine and this led to it achieving universal renown. At the beginning of the 20th century phylloxera reached Rioja and this affected wine production for two decades, after which wine production regained its former prestige.

In 1926 the Rioja DOC Regulating Council was founded and in 1991 the region was granted DOC status. It comprises 14,800 wine-producers and 600 wineries with a bottling licence. Wine production is key to the Rioja region, its vineyard owners, wineries, and all associated industries.

Rioja is one of the most prominent wine-producing regions of the world and its wine tourism industry has developed considerably in recent years. Visitors have been drawn to the region's wineries for various reasons: the quality and personality of its wines, the hospitality of the local community, the extraordinary gastronomy on offer and the beauty of the scenery. The last 20 years have seen marked, and internationally noted, changes to the nature of wine tourism in the region: supply has increased and Rioja has embraced the challenge of developing an innovative and sustainable wine tourism industry that is rooted in the landscape and it has maintained its reputation as a premiere destination.



The Bilbao-Rioja Committee of the Great Wine Capitals organisation confirms that, in the world's wine tourism rankings, Rioja is in second or third position. It has also become increasingly central to the regional economy. The councillor responsible for wine tourism within the Rioja DOC Regulating Council has charted the steady increase in visitor numbers in recent years: in 2019 just short of 860,000 visitors participated in events organised by 195 wineries. It is estimated that each visitor spends on average 3.21 days in the region and visits 2.7 wineries and this requires the organisation of an infrastructure designed to cater for their needs. In this, Rioja is different from other wine-producing regions to which most tourists are attracted by the sun and beaches. It is the Spanish region with the highest number of visits to wineries and this represents a 173 million euro injection into the region's economy. The considerable increase in the proportion of international tourists – who comprise 36.8 % of the total – is a source of satisfaction; most of them are from the United States, the United Kingdom, France and Germany.

Rioja is principally renowned for its wine and tourists are drawn there by the prospect of getting to know the area. The number of visitors fluctuates throughout the year with numbers increasing in August, September and October. The holiday season aside, the attraction of these months is evident as they coincide with the harvest when the vines are in their autumn livery and at their most colourful. April and May, when the vines are starting their growing cycle and are sporting their spring colours, also attract more visitors.

The Spanish regions that provide most visitors are Bilbao, Madrid and Barcelona, followed by Castile and Leon and other adjacent areas. Travel by motorways and main roads is easy and many visitors opt to travel by rail and air; the busiest airport is Bilbao, although those of Logroño and Vitoria are more convenient.

Regional administrations, councils, chambers of commerce and other trade bodies as well as the Regulating Council are well aware of the value of this sector to regional development and they all take part in promotion and organisation initiatives. Some of these are planned jointly – with the support of various local public bodies – and others are private or commercial initiatives.

2. The Rioja Wine-making Region and Wine Routes

The Rioja DOC is in the western part of the Ebro valley and it covers 3,425 km². It borders in the south west with the Ribera Navarra, in the north west with Bureba in Burgos province, in the north with the Obarenes-Cantabria mountain ranges and in the south with the Demanda and Cameros mountain ranges (Tonietto *et al.*, 2012). The unifying thread of the Rioja region is the section of the Ebro that runs from Conchas de Haro to Alfaro (a 110km stretch). The wide valleys that run down to the river are where the towns of the area –the heart of the Rioja DOC– are clustered. The entire area can be considered a tectonic trench ringed by mountain ranges and filled with silt from the Tertiary and Quaternary periods.

The region has a continental climate, but this is influenced by Atlantic weather systems that enter via the upper Ebro basin which weaken as they travel eastwards where the climate becomes more Mediterranean. The mountain chains to the north and south act as a barrier to incoming cloud and



rain. In eastern Rioja, the climate is drier and more arid and is more Mediterranean in nature due to the warm winds that rise up the Ebro valley. Annual average temperatures vary consequently (Haro, 12.8 °C; Alfaro, 13.9 °C) as does annual rainfall: 370 mm per year in eastern Rioja and 450 mm per year in Rioja Alta and Rioja Alavesa.

The topography of the region is also full of contrast, due not only to its geological history –which has created many types of landscape– but also to its location straddling two different climates (Atlantic and Mediterranean). This in turn impacts on the development of vineyards (altitude, slopes, aspect).

The region comprises three areas –Rioja Alta, Rioja Alavesa and Rioja Oriental– and each has its own characteristics thanks to the composition and formation of its soil and the nature of its climate. Each area has its own Wine Route: The Rioja Alavesa Wine Route, the Rioja Alta Wine Route and the Rioja Oriental Wine route (Figure 2). Each of these is affiliated to ACEVIN, the Spanish Wine Town Association, which ensures consistency of approach across the 31 Spanish Wine Routes and those of RECEVIN, the European Network of Wine Towns. Connections have also been made with regions outside of Europe, especially in America, and this facilitates collaboration regarding events to ensure that publicity is optimised and widespread.

Figure 2.
The DOC Rioja Areas and Wine Routes



Source: <http://www.rutadelvinoriojaoriental.com>.

2.1. The Rioja Alavesa Wine Route

It encompasses 15 municipalities, 4 administrative councils and 4 population centres in Álava and covers 316 km². Laguardia was designated by Wine Routes of Spain as the “best wine tourism destination in Spain”. It includes 60 wineries; it has been a member of Wine Routes of Spain since 2006 and has Biosphere certification (Figure 3).



Figure 3.

Vineyards, wineries and scenery in Rioja Alavesa



Source: Ysios and Torre de Oña Wineries (<http://www.rutadelvinoderiojaalavesa.com>).

2.2. The Rioja Alta Wine Route

It encompasses several Rioja municipalities located between Logroño and the northeast of the region, mainly between the right bank of the Ebro river and the foothills of the Demanda Mountain Range. It includes 51 wineries; it has been a member of Wine Routes of Spain since 2013 and the two principal towns are Haro and Logroño.

2.3. Rioja Oriental Wine Route

This wine route comprises 41 Rioja municipalities to the southeast of Logroño located between the right bank of the Ebro river and the foothills of the Iberian System along with 8 Navarra municipalities. It includes 11 wineries; it has been a member of Wine Routes of Spain since 2018 and the key towns are Arnedo, Alfaro and Aldeanueva de Ebro, which has its own wine museum.

Wine Route Activity Programmes

Each Wine Route has a programme of activities which brings together the joint offer of the various wineries. Visitors generally look around the wine production facilities and are invited to taste the wine, but wineries are also offering guided tours around the vineyards aimed at better understanding the complex wine production process.

Much attention is given to the culture that surrounds the vineyards. Guides offer itineraries that cover the local area and take in castles, churches, hermitages, monasteries, underground wine cellars, caves, wineries, archaeological sites, dolmens, ramparts, towers and embrasures, stone wine presses, vineyard guard huts, mediaeval bridges and the fossilised footprints (ichnites) of dinosaurs.



Also popular among visitors are the various social events that are unique to the local communities: harvest and patron saint festivals; markets where artisan produce is sold; cultural events such as medieval days; the wine battles of Haro and San Asensio; the penance procession (Los Picaos) in San Vicente and the Noches de San Lorenzo (Nights of St. Lawrence) wineries event.

Activities aimed at connecting the visitor with the natural environment must also be considered. Hiking tours to natural parks and biosphere reserves provide privileged access to the beautiful views of this relatively small region all parts of which are readily accessible by road. In a short space of time visitors can experience great contrast as they move between the Mediterranean climate of the Ebro basin and the Atlantic climate of the highest areas of the Cantabrian mountain range and that of the Iberian System.

All this means that tourists can sample activities of more than one of the Wine Routes in a single visit to Rioja. Also, a section of the St. James' Way pilgrimage route runs from Roncesvalles to Logroño and so passes through the vineyards of Rioja Alta and Rioja Oriental, an added incentive for wine tourists.

Figure 4.

Vineyards, wineries and scenery of the Rioja Alta Wine Route



Source: Vicente Sotés and Finca Valpiedra Winery.



Figure 5.

Vineyards, wineries and scenery of the Rioja Oriental Wine Route



Source: <http://www.rutadelvinoriojaoriental.com>.

3. The Haro Station District

This Haro Station District stands testament to the revolution that swept through the world of Denomination of Qualified Origin wine in the second half of the 19th century and it is home to the highest concentration of centuries-old wineries in the world.

It grew up around the railway station which was rapidly replacing horse drawn transport as the chosen means of distributing wine. The railway also brought French wine-producers to Rioja who, out of necessity, needed to buy stocks to supplement their own harvests that had been decimated by the arrival of the phylloxera epidemic of 1867. The French winemakers established their export houses in the area adjacent to the railway station.

None of these French wine storage facilities remain. The oldest facility in the neighbourhood was established by the R. López de Heredia y Landeta winery in 1877; in 1879 the Compañía Vinícola del Norte de España (CVNE) was founded; in 1886, Don Ángel Gómez de Arceche established the A. y J. Gómez Cruzado winery; in 1890 La Rioja Alta S.A. company established a presence in the neighbourhood followed, in 1901 by Bodegas Bilbaínas. From 1970 the Muga winery (established in 1932) transferred its headquarters to the Haro Station District and –a decade later (1987)– Roda also made the decision to move to this unique neighbourhood (Figure 6).

The wineries have evolved through the generations and today the architecture of the Station District is a blend of classic and contemporary architecture. Thus, the visitor can experience a voyage through time by tracking the changes to wine-growing and its architecture from the last century to the current day.

Wineries organise their own events, but all come together and collaborate for the Haro Station District wine tasting which promotes the industry. Renowned experts take part, and the event draws wine aficionados from all parts of the world.

**Figure 6.**

View of the Haro Station District wineries



Source: M.J. López de Heredia.

All the Wine District wineries take part in the Rioja Alta Wine Route. The only exception is the R. López de Heredia Viña Tondonia winery, which organises events for its own clients. This winery was established by Don Rafael López de Heredia with the objective, propounded at the National Winegrowers Exhibition of 1877, of making Spain the world's winery of choice. This marked the beginning of a tremendous increase in Spanish wine production between 1877 and 1890.

This same winery developed the Burgundy wine model, adopting its production and aging processes in barrels and vats made of oak, and this same traditional production model forms the basis of practices today. The importance of soil and vine to a wine's signature and quality, plus the winery's pioneering role, all explain the choice of location for the spectacular Viña Tondonia vineyards established over 100 years' ago.

Tradition, as a dynamic concept, is the underlying philosophy of the current directors and it is reflected in the facilities, materials and working methods used in its winemaking process. The underground cellars containing the wine barrels, 10 meters below the surface and carved into sandstone, are 160 meters in length. Exit doors from the cellars open out part way up an escarpment that overlooks the Ebro river, an impressive viewpoint for visitors.

The winery has an extensive archive of documents and vineyard and winery implements which is being mined for a global museum project that the winery is promoting. The visitor centre, accesses and winery courtyard all comprise the first phase of the proposed museum, designed by Zaha Hadid. Its wine tourism model caters for a limited number of visits and the winery only receives about 8,000 aficionados and clients each year.



Figure 7.
Bodega López de Heredia Viña Tondonia



Source: The ©López de Heredia Viña Tondonia archive. Photo by J.R.Rocandio.

4. The Herederos del Marqués de Riscal Winery

This winery is in Elciego in the province of Álava but is not part of the Rioja Alavesa Wine Route. Founded in 1858 by Don Guillermo Hurtado de Amezaga –the Marquis of Riscal– this winery is the oldest in the Rioja region. It was the first to apply Bordeaux methods to its wine production under the direction of Jean Pineau, master winemaker from Château Lanessan. The winery was designed and built in line with the most famous Bordeaux wineries with a cooperage workshop, fermentation vats and rows of barrels on stone pedestals.

The first wines were bottled in 1862. The oldest winery building houses a large cellar where a unique treasure is kept: a collection that contains a bottle from each vintage produced since 1862. The El Palomar cellar was extended in 1883, and further improvements and additions were made in the 20th century.

In 2006 the winery inaugurated its City of Wine complex. Designed by the architect Frank O. Gehry –architect of the Guggenheim Museum in Bilbao– it is the most cutting-edge project carried out by a Spanish winery (Figure 8). The Ciudad del Vino forms part of the company's strategic plan, Project 2000, which aims to transition the company from the 20th to the 21st century by fusing tradition and innovation. A new winery (San Vicente) that will boast the most advanced technology is being built and the company is also investing in a new bottling plant along with other improvements aimed at maximising wine quality and keeping Marqués de Riscal in the vanguard.

**Figure 8.**

The City of Wine Complex in the Herederos del Marqués de Riscal Winery



Source: <http://www.marquesderiscal.com>.

Titanium panels of various colours were used in the construction of the complex, colours that reflect the company and the soil that gives flavour to its wines: the red tones are redolent of its red wines, the golden tones represent the signature wire mesh that is wrapped around each of its bottles and the silver tones reflect the capsule that covers the cork. The building hosts the Marqués de Riscal Hotel, the Luxury Collection Hotel, the Caudalie Vinothérapie™ Spa, two exclusive restaurants that have been awarded a Michelin star in addition to a meeting, conference, and banqueting suite.

The Marqués de Riscal room is an oenology and viticulture training facility which has been built with the purpose of, year on year, spreading the Marqués de Riscal philosophy to clients from the hotel, restaurant and café (HORECA) sector. Courses are delivered in the winery's own facilities and at those of the Castejones estate vineyard. The winery welcomes 100,000 visitors each year.

5. The Vivanco Museum of Wine Culture

The Museum of Wine Culture in Briones (Rioja Alta), established by the Vivanco Foundation at the behest of the Vivanco family, was inaugurated in the summer of 2004. It is a private initiative that represents a key contribution to the world of wine. The museum, located next to the winery, tells the story of the history of wine production. Wine is part of the mythology of the region and its society as wine production –from the vineyard to the winery– has relied on essential traditional skills.



Figure 9.

The Museum of Wine Culture. Vivanco Foundation



Source: <http://www.vivancoculturadevino.es>.

The museum covers an area of 4,000 m² and it comprises 5 permanent exhibition halls, a temporary exhibition hall and, in the grounds, the Bacchus Garden, a collection of *Vitis vinifera* L. vines that includes over 220 varieties from around the world. Considered the most comprehensive winegrowing museum in the world, with a still-growing collection of 20,000 authentic exhibits, it exists to educate its visitors and provide them with the opportunity to interact with the world of wine and come to view it as a civilising influence. The World Tourism Organisation (OMT) and the Spanish International Wine Organisation (OIV) consider it of international importance.

The Vivanco Foundation was established in 2000 and it offers a wide range of activities in the museum premises: the Editorial Vivanco publishing house documentation centre; the Noguera Hill archaeological excavation in Tudelilla (La Rioja); agreements with the Reina Sofía and Lázaro Galdiano museums in Madrid; the La Cité museum in Bordeaux, UNWTO and OIV, collaboration on a shared website with the National Library of Spain in Madrid; the International Engraving and Wine Competition (since 2008); the national day of Wine and Poetry (since 2011) in addition to an agreement with the Cervantes Institute and the Spanish Wine Federation regarding the contribution of an item of Cultural Legacy to the Literature Time Capsule collection. The Vivanco Museum is the Rioja region's top tourist attraction as –since 2004– it has welcomed more than 2 million visitors, 40,000 of whom visited the winery in 2019 alone.



6. Bilbao-Rioja, Part of the Great Wine Capitals and Vineyards of the World Network

Bilbao and Rioja jointly joined the Great Wine Capitals and Vineyards of the World network in 2001 to represent Spain. This network brings together ten cities or geographical regions located near to internationally renowned winegrowing areas. Through co-operation in the field of wine tourism it aims to boost economic and cultural development and promote trade. Representatives on the Bilbao-Rioja Committee are drawn from the Álava, Bilbao and La Rioja Chambers of Commerce; the Bilbao Council and the Rioja DOC Regulating Council.

The Bilbao-Rioja Committee awards an annual Best of Wine Tourism prize to wineries and companies from various sectors that are associated with wine tourism in recognition of their contribution to the industry. A wide range of sectors are associated with wine tourism: hotels and lodgings; restaurants; architecture; parks and gardens; art and culture; wine tourism experiences, both established and new, and organisations that promote sustainable wine tourism. Membership of this international network has shone a light on Rioja's best wine tourism initiatives and broadcast them to the rest of the world.

7. Rioja DOCa Regulating Council Activities

Rioja wines are famous the world over and one of the objectives of the Regulating Council's Strategic Plan is to gain full benefit from this. The plan aims to protect and maintain the region's reputation as a producer of wines of quality and to consolidate the territory's popularity as a leading wine tourism destination.

The Regulating Council's Marketing and Communication Department co-ordinates campaigns that promote Rioja wine from its Rioja Wine Information Office. A diverse range of Spanish and international promotion campaigns and trade missions are organised from here.

The Council is currently immersed in an ambitious plan that aims to boost wine tourism by optimising links with the MICE, or business tourism sector. The Council is doing this by offering incentives that bring together, in conferences hosted by the wineries, representatives from tourism platforms, agencies and intermediaries that promote wine tourism experiences and highlight all that it has to offer, such as its sustainability and the fact that it aligns with many organisations' corporate social responsibilities.

Aside from corporate tourism, the Rioja region is also promoting itself as a family tourism destination. This sector is booming, and the region is putting together a premium tourism offer that suits the more demanding tourist. From this year, part of the Regulating Council's strategy is to personally attend all the main international tourism fairs.



8. Final Reflections

Spain's wine tourism industry is not as developed as it should be since, although the country is a leading international tourist destination with the largest area under vine, a highly developed wine-producing industry and an excellent and renowned gastronomy, it lags behind countries such as France both in tourist numbers and generated income.

Rioja, being the premier Spanish winegrowing region, must not rest on its laurels, but instead ensure that its offer is sufficiently innovative to remedy the situation. It is starting from a solid base: Rioja is the home of a prestigious wine that is in demand around the world and its winegrowers and wineries are committed to maintaining its reputation. To this can be added the stunning natural environment and the region's rich cultural heritage which stretches back a thousand years. This is capital for all the wineries that make a huge effort and invest heavily in order to both bring their properties and holdings up to date and to develop their wine tourism offering by building new wineries, unique hotels and restaurants.

The status of wine tourism as an industry in its own right is well-understood and the need to develop it in line with good business practices is widely acknowledged. It is also clear that it does not merely bring in income, but it also raises the profile of the region's wineries and wines among consumers. The need to adapt in line with new tendencies is clear as competition is fierce, and innovation is essential. Thus, marketing has a key role to play in interpreting the information that is available (data, applied research, market intelligence...), educating all those involved in the industry through information sharing, training and the promotion of co-operation.

Social sustainability also requires the industry to acknowledge the role carried out by local communities in developing the wine tourism sector and recognise its interest in contributing to the protection of the environment on which, in the long term, the development of the region will depend, something already highlighted in other wine-producing regions of the world.

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Part III

Wine Tourism in the Main Countries of the “Old World”



Wine Tourism in France

France Gerbal-Medalle
Tourism consultant

Hervé Hannin
Montpellier SupAgro-Université de Montpellier (France)

Abstract

This chapter, devoted to wine tourism in France, could not hope to present an exhaustive overview of all the initiatives implemented in the numerous and various France's vineyards, nor their performance. Instead, we choose to start with the publication in 2007 of the Dubrule report, which first called for a veritable national strategy for this "hybrid" activity, which until then had without doubt been insufficiently developed. We then outline the main characteristics of wine tourism in France and its evolution towards what can be called "a desire for the territories", incorporating fundamental changes such as experiential dimensions that are necessary for the creation of true wine tourism destinations. We then illustrate our point with some notable, classic or innovative, sustainable and sometimes emblematic initiatives of certain vineyards. We conclude with the main challenges for the future, drawing particular attention to the importance of answering eco-tourism requirements in addition to a necessary cultural and heritage mix as a key success factor for wine tourism projects.

1. Introduction

In 2007, in the context of a crisis in the wine industry, largely due to the strong competition from "New World" wines on the world markets, the Ministers of Agriculture and Tourism, commissioned a report on wine tourism with a central question: "*What can tourism bring to the winegrower, and vice versa?*" Its writer, Paul Dubrule, senator and co-founder of the 'Accor' group, at that time the leader of French tourism and first hotel group in the world, approached wine tourism from the double angle of the tourism economy and the wine economy (Dubrule, 2007). As an expert in tourism, he did not conceive it as a text guide to save the wine sector but rather as a study of tourism opportunities for France. Probably inspired by some models in California (Napa Valley), he particularly thought about developing new local distribution channels for wine through tourism.

Visits of tourists in vineyards are not really a recent phenomenon. Already in the 15th century, the young European elites regularly visited Bordeaux, Burgundy and Champagne as part of the "Grand



Tour". Since the 19th century, travelers' curiosity for wine culture and wine-growing landscapes has grown steadily (Croce and Perri, 2010; Hall *et al.*, 2000). If 2007 does not then mark the birth of wine tourism in France, it is the year when at its highest levels, the state was finally convinced of the urgent need to structure, communicate and market a national wine tourism offer. Thirteen years later, wine tourism is at the heart of France's tourism strategy, in particular via a "center of excellence"¹ managed by the French Ministry of Foreign Affairs, and also via the "wine tourism" cluster² set up in 2000, and via a showcase supported by Atout France³, the www.visitfrenchwine.com website. The regions and appellations set up their own policies and forms, which can also revolve around an inter-ministerial label: Vignobles & Découvertes®.

There follows, described in broad strokes, a presentation of (i) the main characteristics of wine tourism in France, (ii) its historical evolution towards what can be called "the desire for territories", (iii) some of the most noteworthy, innovative and sustainable illustrations in the vineyards and finally (iv) a projection of the main challenges for the future.

2. Main Figures of Wine Tourism in France

Associating vineyards and tourism immediately drew attention to the dynamic nature of tourism, as tourism is a constantly changing economic activity. France had 2 million tourists each year by 1930, just over 3 million in 1950, 30 million in 1980, and now nearly 85 million foreign visitors per year. Not only is the tourist population growing rapidly, but tourism practices and destinations are also regularly evolving. Tourism accompanies the changes in the world, "our relationships with the world are horizontalizing" (Viard, 2016), vacation times are more varied, they are spread out over more spaces. In addition, "vacations and travel have reorganized our uses of territories by making certain places, certain regions, to the detriment of others" (Viard, 2016), the vine thus passing from a place of agricultural production to a desirable tourist destination.

Figures provided for wine tourism by "Atout France" give evidence on this single sector in France: 66 departments concerned, 10 million visitors, including 4.2 million foreigners mainly Belgian (27 %), English (21 %), German (15 %), Dutch (11 %) and American (4 %), with an average basket in wine at 240 euros. The development objective announced in 2015, for over 4 million foreign visitors from 2020, was in fact surpassed in 2016. The website www.visitfrenchwine.com alone has 33,000 visitors/month⁴, 84 % of whom are foreigners (Médalle, 2020).

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1 Its goal being to unite all the different players in viticulture and tourism, in order to develop a coordinated French offer and promote it effectively with foreign tourist clientele.

2 The Cluster brings together partners from the French tourism and wine industries, both institutional, professional, and representative of the diversity of the offer along with the 17 French vineyards in a voluntary and collective approach to the development of wine tourism.

3 Agency created in 2009 responsible for the promotion and engineering of the French tourism industry and charged with strengthening its global positioning.

4 https://www.tourmag.com/0Enotourisme-Destination-Vignobles-se-tiendra-a-Bordeaux_a91869.html. (20/08/2018).



3. The Evolution of Wine Tourism: Towards a Process for Creating “Desire for Territories”

Wine tourism, thus having become an integral part of the French tourist landscape, particularly its internationally renowned vineyards such as Bordeaux, Burgundy and Champagne, is the result of an innovative concept, “the desire for a territory”. This proceeds not only from “tourism development”—the development of destinations in the face of a demand for leisure— but also from different forms of “distancing”—the dichotomy between a “here-banal” and an “elsewhere-exotic”, and “heritage”—which highlight places, local cultures and myths.

Vineyards appear today as an ideal leisure environment, even as an idyllic living environment. The wine landscape, explained by geographers and valued by tourism communication professionals, is now a land of adventure and desire for many travelers. Like country life, which has re-attracted for several decades a supposedly disenchanted urban population, vineyards have now become idealized places to live. The art of living, tranquillity, the quality of the environment, its products, time itself, are so many virtues with which vineyards are now invested, even where previous generations sometimes saw nothing but trouble and toil. Maybe in the future, some critical points recently and widely exposed in the media about the harmfulness of certain wine additives and practices could modify these mythical perceptions.

The “desire for a territory” as evoked through touristic journalism is one of the ways to convince particular communities to invest, in terms of both capital and lifestyle choices, in a given territory (Urry, 1990). Inscribed in a shared media space, this culture is not only received by tourists alone, it also irrigates the whole of society. It produces “identifying images” (Cousin, 2008) of the lived experience of the urban world (badly: “junk food”, poor housing, air pollution, time acceleration) which resonate in juxtaposition with the fantastic experience of a ‘dream-perfect’ rurality. This image thus conveyed—either read prior to the physical discovery of the vineyard or received during the visits— aims to increase tourist consumption; it allows winemakers to communicate on the quality of their production and elected officials and institutions to play the card of territorial attractiveness. The press, national or specialized, frequently disseminates articles promoting the installation of “neo-winemakers, having left stable and profitable situations, to return to live in the countryside, to take back vineyards to live a real life”⁵.

We note the significance of “returning to the countryside”, which reinvests the idea of an original rural France, once deserted for the city, and that of the countryside, the only crucible admissible for “living a real life”, as if urban life were unreal! The appropriation of the vineyard represented as a panacea is fuelled by descriptions of the transformation of the countryside which make it even more attractive. Newspapers, social networks and documentary films⁶ readily promote among city dwellers this often-inaccessible dream of a unique place for work, life and vacation. The vineyard, the place of production, no longer a place of labour alone, becomes a place of idealized life, leisure and landscaped decor: “How lucky you are to live in such a place” or “Being here it doesn’t really feel like

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5 Interviewed anonymously on the Facebook social network in September 2018.

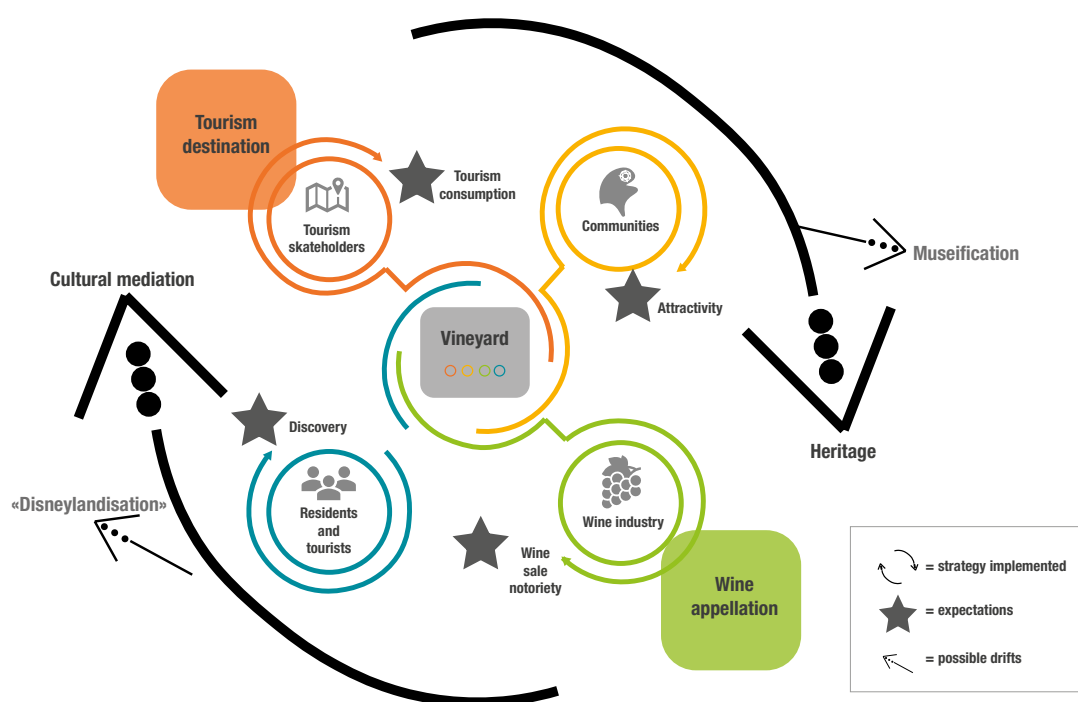
6 “Wine Calling”, documentary film.



we're working" are rather eloquent words heard. Life in the vineyard seems romantic, inherited from Lamartine, who declared "*I am not a poet, I am a winegrower*".

Creating a "desire for a territory" also relies upon the fact that it is desired by other people, thus evoking qualities of hospitality at the vineyards and their convivial inhabitants. The sweetness of life celebrated by poets over the ages, often represented in painting, and now praised in tourist brochures, is very much due to the main player in the wine-growing region: the native. The quality of their welcome is itself reinforced by tourist journalism which represents them as ambassadors of their territory, having the privilege of living in a territory of leisure and holidays desired by others. This dynamic, fuelled by a mimetic desire, refers to the strength of the socio-economic motor that is imitation (Tarde, 1890; Girard, 1978). Discovering or rediscovering a territory during leisure time or on vacation, the inhabitant can themselves become privileged wine tourist in their own home territory. (Figure 1). In consequence, appellations and actors of the wine industry see in wine tourism an opportunity for a new development, able to attract tourists and seduce inhabitants with various animations and events.

Figure 1.
Process of setting territory in desire by wine tourism



Source: FGM (2018).

If inhabitants and wine tourists are in a process of discovery (and transmission) vis-a-vis their vineyard territory, elected officials and communities are aiming for its attractiveness. This is now becoming a major issue amongst municipalities, metropolises, regions, intended for businesses, inhabitants and visitors (potential entrepreneurs or even regional ambassadors). The attractiveness of a territory relies



on three pillars, productive, residential and tourism: attracting businesses and capital for productive purposes, population for residential purposes (Fabry, 2009), tourists by capitalizing on wealth and working to enhance it. Thus, institutions frequently accompany wine tourism destinations in a process of heritage creation for landscapes and wine-growing buildings.

3.1. The tasting visit or the “monad” of wine tourism

For several decades’ winegrowers have been, spontaneously and almost everywhere, offering tastings accompanied by a visit to the estate. It is the simplest, first offer for individual customers, the starting offer for winegrowers of the wine tourism industry and, lastly, the activity most widely sought after by visitors. It is thus like Leibniz’s monad, an atom of tourism.

Rarely charged for in France, unlike in the new wine world, these free guided tours often take a similar and basic form: a welcome to the estate by the winemaker or by dedicated staff, an explanation of the winemaking process in the cellar or more rarely in the vineyards, then return to the cellar with wine tasting. The tasting, also fairly standardized, offers wine tourists almost all the wines on sale at the estate without distinction. It is like a commercial presentation of the wines, close to tastings for the general public in salons or in stores: the description of the grape varieties used, the vinification methods, with in particular an expectation, shared apparently by the winemakers as by visitors, on the possible use of “French” oak barrels. Neophyte customers seem to see this as a guarantee of quality as well as the depth of tradition. Note that the winemakers rarely mobilize the appellation, its qualitative specifications and its history in their speeches; this is all the more so if they offer “natural” wines or if –neo-winemakers in particular– they want to free themselves from this history or the constraints of the specifications and demands of the ‘appellations’⁷.

According to the association of independent winegrowers of France, in 2016, 90 % of winegrowers who welcome the public, offer at least two activities within their domain. The duo “tasting and visit to the domain” is the most frequent, associated with a third activity. The technical visit to the estate during which the winemaker explains his profession and his work is the most frequent activity; one must note that proposals for initiation into tasting offered by a winemaker remain very scarce.

To strengthen the sense of ‘destination’, the ‘wine-tasting visit’ may very well need to integrate the concept of ‘a wine tourism experience’: with a sense of theatre or stage setting, an open discussion about the environment, history, landscape and/or a “theming” of the tasting, creating a privileged moment for the visitor. It is this transition from the tasting tour to the “experiential product” that truly brings us into the hedonistic dimension of wine tourism.

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7 The documentary film “Wine Calling: the wine rises” by Bruno Sauvard (October 17, 2018) particularly highlights this aspect in his press kit: “For ten years, the world of wine has been in full swing, jostled by a counter-culture like rock may have been by punk in its time. A little everywhere in France and more particularly in Occitanie, cheerful rebels have invested in our terroirs to invent the wine they like natural and without artifice. Much more than an organic wine, it is a wine of emotion and reaction, a wine that no label governs, a free wine. We are going to meet these new winemakers”.

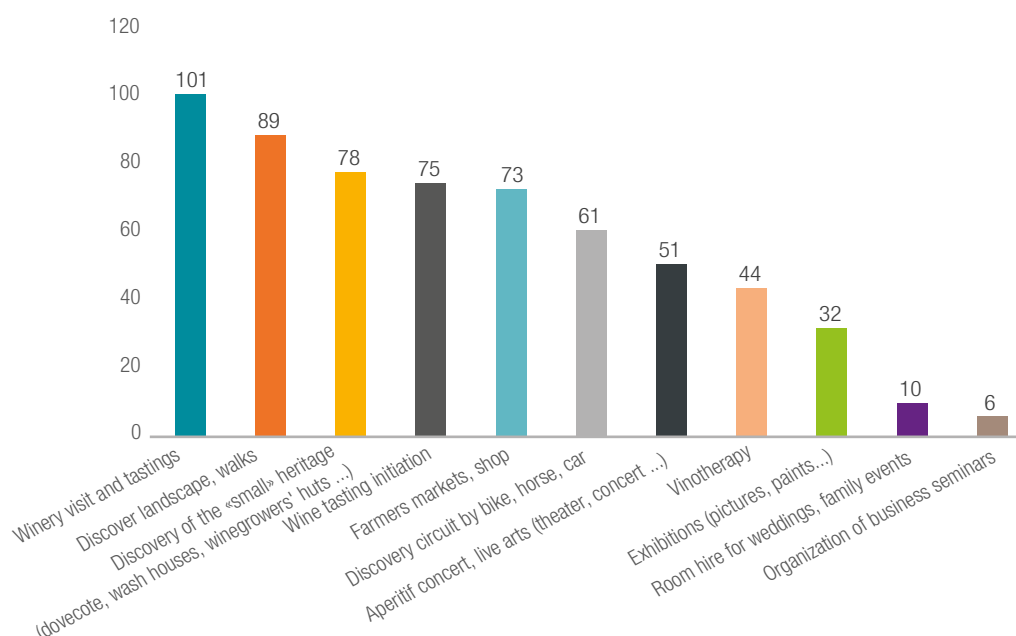


3.2. The Wine Tourism Experience: From the Tasting Visit to the Experiential Tourism Product

According to Pine and Gilmore (1999, 2002, 2007), the concept of experience consists in the dramatization of the service or product. The wine producer, the tourism professional, go beyond the guided tour and the tasting, transforming themselves into actors, the customers are the guests or even themselves sometimes actors, and the domain becomes the stage. Visitors want to learn, discover and have unique experiences (Figure 2). They are looking for a form of interactivity. They want to know the ways of life of the people, to visit the behind-the-scenes and specially to access places where tourists are not used to going.

Figure 2.

What activities are you looking for at a winemaker? Survey 2017-2018



Source: France Gerbal-Médaille (2018).

This experience, which carries emotional feelings, refers to hedonism: pleasure (and its quest) as sovereign good, as a paradigm which seems to preside over a number of wine tourism proposals made by winegrowers. Thus, blending workshops, harvesting or pruning workshops offered by many winegrowers and collectives, are all transcendent experiences and sources of learning, offered in the fields. Experiential tourism is a tool for differentiation, making it possible to stand out in increasingly competitive tourism markets. Like these visits-workshops-grape harvest, it is a question of meeting the expectations of consumers, of travelers wishing to explore something unique, of being no longer a mere observer of the place visited but of being able to immerse yourself in it, participate, integrate with the daily life of the inhabitants of their destination and thus become a “winegrower for a day”.



3.3. From the Tasting Visit to the Wine Tourism Destination

The wine tourism destination of France competes with its European neighbours for almost all the countries of the world. It also competes with the French budget for all other possible hobbies. The challenge of differentiation is considerable, which cannot be reduced to a simple discount. Responding to current “experiential” expectations, winemakers have developed four main categories of wine tourism offers: outdoor activities, cultural activities, gourmet activities and other activities taking up the various forms of individual wine tourism offer.

The wine tourism destination is based on a complex system of actors, notably mixing in rural areas, actors of tourism and viticulture, but also local population, elected representatives, tourists, various socio-professionals, and simple users of the territory. It also takes root in the notion of territorial attractiveness, which rests on three pillars which are the productive fabric, the residential fabric and the tourist fabric. In the field of wine tourism, we can see that territorial attractiveness mixes nomadic tourist attractiveness, services offered by tourism focused companies, the demand and the supply of tourist services and products in related areas, but also the economic attractiveness of production. Thus, some ‘appellations’ are supporting the development of a wine tourism destinations to enhance the value of their production, increase prices and thereby achieve a higher level of profitability for winegrowers. By taking advantage of territorial dynamics in the development of wine tourism, they can enhance the qualitative transition that has taken place in recent decades. The approach initiated in Gaillac in 2010 to co-create the European cultural route *Iter Vitis*, with Italian, Spanish and the Banyuls vineyard partners, is one example. This involves activities like welcoming the wine tourism sector, teaching during collective and individual events (festivals and wine routes, thematic tastings) and investing in collective approaches like Vignobles & Découvertes®.

To emerge, a wine tourism destination must be identified as such by tourists, be known and communicated as “the place to go”, but also as a place of wine tourism production; hence the importance of its identity supported by a brand through a territorial marketing strategy, and a set of projects bringing together all the players in the territory.

3.4. The Vignobles & Découvertes® Label: intra-Appellation Wine Tourism Destinations

The Vignobles & Découvertes® label was jointly designed by the French Ministry of Foreign Affairs and Agriculture following the Dubrule report and the establishment in France of the Superior Wine Tourism Council (CSO) in 2009. It is awarded for three years by Atout France for a tourist and wine-producing destination able to offer a range of multiple and complementary tourist products (accommodation, catering, cellar visits and tastings, museums, events, etc.), to facilitate the organization of a customer’s stay and to direct them towards qualified services.

To date, over all the French wine-growing basins, more than 60 destinations have been certified. With more than 4,000 tourism and wine providers engaged in a quality approach aimed at the customer, it has become the first network of wine tourism players, in number of players, as well as its history.



Some achievements are already well established and regional in scope such as the wine routes⁸ of Bordeaux or Alsace⁹; other more limited initiatives concern vineyards that are sometimes less well known¹⁰ or even intra-appellation¹¹. Designed as a territorial and tourist brand, intended for the domestic as well as the international market, Vignobles & Découvertes® aims to develop both the tourist efficiency of wine destinations, the image, the reputation and the sales of tourism and wine players in these same territories. Complete tourism products, easier organization of stays, qualified and guaranteed services must improve the legibility of offers.

4. Noteworthy, Innovative and Sustainable Cases/Stories of Wine Tourism

Among the numerous examples of wine tourism initiatives and success stories in France, some achievements, considered well-known or even classic, such as those labelled by Vignobles & Découvertes® illustrate both the deep roots of the movement and its diversity. We propose instead to point out certain initiatives which seem noteworthy, and often symptomatic of new trends, be they sustainable or simply well adapted to the expectations of a tourist-consumer in constant evolution.

Pioneers in the concept of gourmet walks 20 years ago, the “Vignes Buissonnières” now welcomes over the course of two days, more than 3,000 participants annually. The route, around the slopes of the Pic Saint-Loup and modified each year, is punctuated by 6 gastronomic stages. Participants discover both local landscapes; nearly 80 wine references; as many winegrowers with whom to discuss. Such “themed walks” combining gastronomy and wine have since been developed in other Languedoc vineyards such as the Terrasses du Larzac, enriched by “Les Régallades”¹², or the Costières de Nîmes with its “Vignes Toquées”. They often combine with more classic festivals around the grape harvest (e.g. “Festa de la vendemia” of Valflaunès in Pic Saint Loup) or the cellars (“Toutes Caves Ouvertes” of Montpeyroux).

The Fontevraud International Charter, driven by the Loire Interprofession and the “Loire Valley Mission” has been ratified by the main organizations in the sector. It enhances the territory in terms of landscape qualifications and wine tourism structuring. By affirming that the (wine) landscape “*contributes to the development of local cultures and represents a fundamental component of Europe’s cultural and natural heritage*”, it reaffirms the cultural, ecological, social and heritage dimension of vineyards and the ambition to encourage all players in wine-growing regions to “engage in voluntary and concerted landscape approaches, combining in a logic of sustainable development, the optimization of production and cultural and tourist development, within the framework of an international network of excellence”. Far from proposing to freeze the landscapes, it aims to support a process of progress, with an objective of sustainable development. Thus the preservation of jobs, tourist activities, territorial

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8 <http://www.atout-france.fr/content/decouvrez-les-destinations-labellisees-vignobles-decouvertes>.

9 <https://www.route-des-vins-alsace.com/fr>.

10 <http://www.vignoble-ile-oleron.fr>.

11 <http://www.tourisme-en-champagne.com/le-massif-de-saint-thierry-la-vallee-de-lardre>.

12 At the church of St Martin du Barry since 2010 .



and cultural organization is not frozen by the Charter, no more than the preservation of the landscape which must take in account the evolution of viticultural techniques; for instance mechanization as well as organic viticulture can cause modifications of landscapes.

By the way, the Charter affirms a wine tourism dimension; unfortunately it still concerns only seven member vineyards: Loire Valley, the village of Château-Chalon, South Coast of Beaune, Lavaux, Costières de Nîmes, Brouilly and Côtes de Brouilly, Grand Pic Saint Loup; and the public seems to remain unfamiliar with this classification. Adhering, for a fee, to the Fontevraud Charter is nevertheless a great tool for mobilizing the various players around the importance of sustainable development and the preservation of natural and landscape resources.

This reference to sustainable development can be observed more and more explicitly in most major recent and noteworthy projects. This is the case of “Viavino”, “rural excellence project” born in 2008 at the initiative of Jean-Luc Bergeon, visionary mayor of Saint-Christol: served by the architecture of Philippe Madec, it has become emblematic with its use of sustainable local materials and energy-saving devices. Based on a realistic vision of the expectations of the population, it endeavours to create combined concepts such as the annual “oenotrail”, or rapidly supporting villagers in lockdown this spring 2020, by inaugurating a ‘drive’ store offering wine and fresh local produce.

This is also the case for the Vignerons de Buzet¹³, who have been deploying a new wine tourism policy since 2018, in conjunction with investment in the town’s renovation and preservation of its heritage. The chateau’s preservation is carried out in line with the sustainable strategy decided under the leadership of the director Pierre Philippe and implemented by the winegrowers and the cellar teams. Combining heritage and sustainability (which has been the guideline for 10 years), it shows the face of a wine tourism of tomorrow, condemned to bear the true attributes of “eco-tourism”.

Wine-culture tourism can underpin an image of conviviality across the territory and among winegrowers, reinforced by the varied offer of activities in both fields. And although part of a seasonal tourist calendar, these perceptions give the territory year-round colour. The Beaujolais appellation seized this opportunity in 2017, by proposing a new positioning strategy combining gastronomy, wine and conviviality, “beaujonomie”; the word was created as a mix between Bistronomie and Beaujolais. This key concept of the new Beaujolais communication strategy, proposed by Jérémy Arnaud, is defined as “a traditional dish revisited to share with a characterful Beaujolais in a chic and relaxed bistro atmosphere”. It was soon transformed into an annual event “Bienvenue en Beaujonomie”, that welcomes you to join winegrowers “around beautiful cuvées of character and exception”. From here a huge range of social leisure propositions demonstrating the conviviality of the wine growers and the quality of the wines has flourished: wine bars, food trucks & open-air concerts, all placed under the new concept of “wine-bistronomy”.

Other innovative forms of wine tourism emerge periodically in France, backing up their positioning with regional images, more or less ingrained, more or less reinvented; thus village conviviality is summoned in this concept of the “exploding” hotel called “Castigno” by its designers who repainted

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13 <https://www.terredevin.com/actualites/la-vie-de-chateau-pour-la-cave-de-buzet>.



the village of Assignan in the colours of a somewhat mythical Languedoc. In Provence, the “Château Lacoste”, for its part, has gathered a collection of world-class art treasures.

Furthermore, how could we forget to mention the major attraction of the “City of Wine” of Bordeaux opened in 2016, which aspires to “bring vineyards into the city”, and where “every detail of architecture evokes the soul of wine”; or the modernist ambitions of a “wine tourism lab” trying to emerge in Champagne. There exists a profusion of ideas such as –citing from the Occitanie region alone–: Solex, 2CV, or 4 x 4 rides (in Haut-Lirou), balloon flights or ULM (in Gaillac), the “oenorandos” of the Hérault Oenotour, tastings on a catamaran (Bassin de Thau). More “technique/skill” oriented offers include initiations into horse-drawn plowing, pruning parties (L’Hospitalet), workshops to “create your own wine” at the cooperative cellar of Baixas or courses in “understanding” organic wines in Banyuls.

5. Conclusion: Towards a New Definition and New Challenges for Wine Tourism

To summarize, wine tourism is a social, cultural and economic phenomenon. It involves the movement of people to wine-growing regions, or presents a heritage or cultural attraction linked to the vine and wine, for a period of less than a year, for personal or professional or business purposes. So it can be all at once: rural and peri-urban tourism and also urban tourism (wine bars); “terroir” tourism and also industrial tourism (visiting wine cooperatives); school and family tourism; creative tourism (apprenticeship in the wine and vineyard professions); business tourism (seminars, conventions such as Vinexpo); event tourism (cultural, sporting or festive); and, of course, cultural tourism thus defined by the European PICTURE program: *“cultural tourism is a form of tourism centered on culture, the cultural environment (including landscapes), values and lifestyles, local heritage, visual and performing arts, industries, traditions”*.

This heritage dimension of Wine and Vine has been seized on by UNESCO which has placed on the property list several vineyards like St Emilion, Champagne, Burgundy and others (Pichery, 2017). Aiming to enhance the heritage dimension of wine-growing landscapes as well, in 2009, the Council of Europe awarded the title of “European Cultural Route” to the “ITER VITIS, Vine Ways” approach. This route is not a path here but a giant panoramic puzzle, on a continental scale. It is indeed one of the great challenges for wine tourism to be able to blend heritage and cultural aspects (Medalle, 2020, p. 244).

The skills implemented in these fields have given rise in France to dedicated training initiatives which are increasingly developed and recognized, including at university level at the Bachelor or even Master level, either explicitly focused on this theme, or which approach it in a larger program. This is the case in the most recognized wine centers (Bordeaux, Montpellier, Dijon, Reims and Toulouse) and other ones such as Avignon and Nîmes. More open to the world, the European Master “Wintour” and of course the OIV MSc in wine marketing appropriately addresses this theme in its international dimensions.



As the Dubrule report recommended, new forms of wine tourism offer interesting prospects for the marketing of wine. This effort has perhaps never been as necessary, as French consumption continues to decline, as strict regulation still limits possibilities for promoting wines, and as the world market gets more competitive; and as exceptional increases in taxes on exports to the USA take hold (like in 2020), along with the disruption and unpredictable crisis caused by the COVID-19 as now.

Wine tourism, this dynamic and versatile field, embodies promising opportunities to meet the demands of tourists and evolve with consumers. It can help generate an enhanced reputation and a stronger image. As it opens up wider opportunities for consumption, it creates value. In the medium and long term, legitimate questions are emerging about the effects of the prolonged and massive confinement of citizens and a disrupted world economy; perhaps a new future is being invented concerning tourist practices, consumer behaviour and distribution channels of wines.

By offering the possibility of extracting ourselves from our time and our space to reinvent ourselves, wine tourism allows us to meet the “Other” as ourselves, to understand the World, appreciate the differences, taste the flavour and join Bernanos who wrote¹⁴ “to understand is already to love”! The inventiveness to create such desirable destinations and the desire for territories is testimony to this. Wine tourism then appears as a form of hedonism based on a search for otherness, out of time and in an “heterotopic space” (Medalle, 2020). To temper this hedonistic approach with a virtuous outlook, wine tourism requires a quest for sustainability: it becomes then not only a social and geographic phenomenon but also a value system reflecting our society.

Wine tourists and wine tourism have changed our perception of rural areas and traditional agricultural practices, which once were perceived as harsh and demanding, disdained by city dwellers in a France that had become industrial. Today, behind excessive and widely publicized demonstrations relating to agri-bashing, many citizens legitimately express important questions concerning agriculture, viticulture and rurality. In this context, how can we ignore the possibility that many wine tourists may wish nothing more than just to learn about, to understand and ultimately to make their own wine?

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Wine Tourism in Italy

Antonio Seccia

Università di Foggia (Italia)

Roberta Garibaldi

Università degli studi di Bergamo (Italia)

Abstract

In Italy wine tourism is becoming increasingly important in all regions. An integrated offering has been developed in vitivinicultural areas, including a diversified portfolio of wine-related experiences provided by wineries and other actors. A relevant role for the birth and the development of wine tourism has been played by the main associations which have created and supported initiatives and events related to wine tourism. On the demand side, wine tourists look for subjective and memorable experiences, and together with wine they also would like to experience gastronomic, learning and entertaining activities. The COVID-19 crisis in 2020 has deeply affected wine tourism in Italy leading wineries to temporarily close to the public; however, producers have reacted by improving Direct-To-Consumer activities and digitalization of services. Moreover, with the reopening after the lockdown, the Italian wine tourism industry has started again, investing in modern technologies creating open air experiences in vineyards to be offered along with indoor visitations in safety and according to the principles of sustainability.

1. Introduction

In Italy, wine production has spread throughout all regions and it plays a relevant role, economically, territorially, historically, socially and culturally. Some regions have a better reputation than others do, by virtue of higher production volumes and an established tradition of high quality. Grape-growing has contributed to create a huge diversity of rural landscapes and a multiplicity of wines, which differ in terroir, sensorial characteristics, as well as in historic and cultural aspects. Such diversification is proved by 526 geographical indications in the national territory: 408 Protected Designation of Origin (PDO) and 118 Protected Geographical Indication (PGI) (ISMEA, 2019). The role played by viticulture and the production of wine is essential for the preservation of different and world-renowned viticultural landscapes. Two of the most known, “Paesaggi vitivinicoli delle Langhe-Roero e Monferrato” in the Piedmont region and “Le Colline del Prosecco di Conegliano e Valdobbiadene” in the Veneto region, have been inscribed on UNESCO’s World Heritage List.



The specificity of wine production has contributed to activating a demand for a segment of rural tourism in grape-growing areas which has consolidated a segment of tourists, defined as wine tourists, who regard the product as their main reason for travelling. This has resulted in a flow of tourists, who travel to established Italian wine regions to visit vineyards and wineries with the landscape, as well as the cultural, historical and social contexts of which the wines are an expression. Wine tourists look beyond the material and commercial aspects of the product, seeking immateriality and fusion with the place, to have a new sensory experience.

To meet the demand for wine tourism, in Italy an integrated supply has been developed, characterized by diversified components, controlled by the various public administration bodies, at national and regional levels, and by various private operators. In addition, food and wine tourism are often associated with several forms of ecotourism and responsible tourism, as attested by the growing trends of social responsibility in the tourism industry (Del Chiappa *et al.*, 2016).

This chapter aims to describe the main aspects of wine tourism in Italy, and for such purpose the following paragraph shows an overview of the general context, the third paragraph outlines some aspects related to the characteristics of the demand by wine tourists, the fourth paragraph reports some reflections on the effects that the Covid-19 crisis is having and will have on wine tourism in Italy and some final remarks end the chapter.

2. Wine Tourism in Italy: An Overview

In Italy, wine is an important factor in tourist attraction: more than 16 million people a year participated in events, fairs, and local festivals related in some way to this product and wine tourism generates an economic value of around 2.5 euros billion, from about 14 million tourists per year (including overnight stays and excursions). Each wine tourist spends an average of 85.00 euros per day, distributed among purchases of typical products and wine in the visited winery, meals in restaurants, accommodation in agritourism farms, souvenirs of typical local crafts, etc. Spending can almost double among the more advanced wine tourists (i.e., sommeliers, connoisseurs) to reach 150.00 euros per day (Osservatorio del Turismo del Vino, 2019). Consequently, wine tourism is very important for the related upstream and downstream activities and for its positive effects on all the companies related to the agri-food sector in the territory. In Italian vitivinicultural areas, wine tourists account for an average of 36 % of the revenues of hotels, restaurants, producers and retailers of typical food products. The most attractive Italian wine tourism region is Tuscany (preferred by 48 % of wine tourists), whereas Piedmont ranks second, Trentino Alto Adige third and Campania fourth. During the period 2011-2016, the average increase in arrivals in the wine-producing areas was 25 %, with peaks in the Montalcino (+125 %) and Chianti (+35 %) areas (Assoenologi, 2018).

In Italy, wine tourism is regulated by Ministerial Decree n. 2779 (March 12, 2019) "Guidelines and directions with respect to requirements and minimum quality standards for wine tourism activities". The Decree equates wine tourism with agritourism activity, considering also fiscal aspects. It contains guidelines and minimum standards to guarantee the quality of services and, in terms of the activities concerned with the term "wine tourism", in addition to tastings, the following are included: guided



tours to the vineyards; educational, cultural and recreational initiatives; didactic harvest; wine tasting with other agri-food products.

The wine tourism offering has the characteristic of being an integrated and composite system, with the aim of providing product-experience to meet the different expectations of the demand. The main component of the product-experience is represented by the visit to the cellar and wine tasting in the context of the wine-growing landscape; however, the wineries, with the involvement of other actors in the territory, have diversified the offering with such complementary activities as cultural events, concerts, exhibitions, wellness treatments, cooking classes, themed dinners, sensorial experiences and sports activities. Some Italian wineries have specialized in wedding tourism by promoting, particularly in other countries, a portfolio of Italian wineries as destinations for weddings or honeymoons. The wineries, therefore, try to attract not only wine lovers, but also a wider swathe of tourists, by aiming at the enhancement of the territory, the discovery of hidden gems in areas hardly touched by traditional tourist flows, and developing a cultural tourism more interested in landscape, rural culture and wine traditions. To develop this type of experiential tourism, the wineries have equipped themselves with accommodation facilities, in addition to the cellar and tasting rooms. In the initial period of wine tourism development, the existing wineries were adapted for the reception of visitors, and later, the new concept wineries, born in the last fifteen years, have considered spaces for tasting, sale and visiting right from the earliest part of the design phase. The wineries open to the public can be divided into at least 5 types, each of which is aimed at a specific target customer: 1) historic and monumental, 2) functional, 3) masterpieces of modern architecture, 4) family and boutiques, and 5) oenology stars owned by mythical wine names (Cinelli Colombini, 2018). In particular, the historic cellars, members of the Association of Italian Historic Houses, are owners of cultural assets bound as national monuments, which include gardens, vineyards, olive groves and woods that are of considerable architectural and landscape importance.

For wineries, wine tourists are an increasingly important source of income and, currently, they account for an average of 26.9 % of revenue¹. The wineries open to the public for direct sale number over 20,000, whereas those equipped for reception number around 1,200, and the seasonal employees involved in wine tourism are estimated to number around 30,000 (Assoenologi, 2018). According to estimates, the amount of direct purchases in the winery varies based on the geographical areas and the value of the wine, ranging from 3 bottles for expensive wines to 6-12 bottles for mid-range wines, priced around 8 euros. Moreover, the impact of direct sales on total company revenue can represent a minimum of 20 % to a maximum of 60 %, according to the type of wineries (SGA, 2016).

In the vitivinicultural areas, the integrated tourist offering is coordinated by 170 Wine Routes, mostly concentrated in the northern regions and in Tuscany; in Southern Italy, the regions with the most Routes are Sicily, Puglia and Calabria. The Wine Routes, regulated by Italian Law n. 268/1999, bring together wineries, restaurants, hotels, wine bars and other public and private facilities, clearly using the typical wine of the area as a physical and cultural link between all the subjects involved. This joint management encourages tourists to organize their stay in a way that allows them to experience the territory on an oenological and an intellectual level. In 2006, the Wine Routes were made further subject to European regulations through The European Charter of Wine Tourism, which connects the

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1 The data include income from wine sales to tourists and other tourism related activities.



development of tourism and leisure activities to the wine culture, which includes the vineyard, the wine and its territory.

Relevant subjects in promoting and communicating wine culture are the museums of wine and vines which are in almost all Italian regions, although they differ in thematic approach, as well as in their size and history.

Two associations have played a fundamental role in the birth and success of wine tourism in Italy: The National Association Wine Cities (*Associazione Nazionale Città del Vino*) and The Wine Tourism Movement MTV (*Movimento del Turismo del Vino*).

The National Association Wine Cities was established in 1987 and has over 550 associated entities, including 430 cities. Among the guiding principles of the Association are the following two concepts:

- The vineyard is a fundamental part of the landscape, as well as of all the agricultural areas involved, and its protection is strategic for the quality of the territory, and it must therefore be programmed in the administrative action;
- Local development can only derive from shared choices that come from a collaborative partnership between public and private institutions.

The objective of the Association's activity is to help the associated municipalities to create a network of work, opportunities, economic and sustainable development, through the enhancement of food and wine products and, obviously, while respecting the characteristics of the territory and tradition. Among the important projects that the Association is pursuing for the development of wine-growing territories, the most significant are:

- Activities as member of Recevin: European Network of Wine Cities, established in Strasbourg in 1999.
- Ethical paths: This has the objective of promoting and spreading ethical culture among national municipalities based on the principles of social responsibility and the respect for the environment. The project works to preserve resources and exploit them in a sustainable way by acting on such topics as the environment, health, social context, culture and landscape.
- The International Wine City Challenge, in collaboration with the Recevin organization.

The Wine Tourism Movement was established in 1993 and is a national association made up of 20 regional associations. It is comprised of over 800 associated Italian wineries, selected based on specific requirements, the most important of which is the quality of the wine tourism services. At a national level, it reaches strategic agreements with players in many fields to provide services to visitors, allowing regional associations to manage local initiatives. Considering that the activity of wine tourism incorporates different functions, including economic and territorial development, and represents a tool for enhancing and protecting the environment, the association has 4 priority objectives:



- To promote the culture of wine through visits to production areas.
- To support the increase in tourist flows in all areas of Italy with a strong wine vocation.
- To qualify the touristic services of the wineries.
- To enhance the image, the economic development and employment perspectives of the wine territories.

In 2003, the Association issued the Handbook for Hospitality (Decalogo dell'Accoglienza), which arose from the need to qualify the tourism services provided by its associated wineries. It consists of the requirements that must be guaranteed by all the members of the Association, including: Suitable signage for the facility, the specific preparation of the staff, the availability of tasting glasses, the possibility of taking a guided tour and the preparation of informative wine-related material. The wineries that meet such quality standards obtain the "Quality Certification", which refers to professionalism in hospitality. The Association collaborates with many organizations to realize such large-scale events as the Vinitaly fair and to participate in national and international conferences, scientific research and substantial communication and promotion initiatives. The Wine Tourism Movement has given rise to many initiatives, which include environmental protection measures and main-sector events such as *Open-day at Wineries* (Cantine Aperte), *Open-day at Wineries during harvest time* (Cantine Aperte in Vendemmia), *Open-day at Wineries on St. Martin's day* (Cantine Aperte a San Martino), *Open-day at wineries during Christmas time* (Cantine Aperte a Natale) and *Chalices of Stars* (Calici di stelle).

The debut of *Open-day at Wineries* (Cantine Aperte) in 1993 can be considered the birth of wine tourism in Italy. This great event was born of the observation that the wineries were closed to the public and therefore closed off from the awareness of the importance of the link between producers, consumers and territory. Since then, the last weekend of May represents a fixed date for the event which is currently consolidated in all Italian regions. The opening of the winery allows the consumer to participate and actively observe the place where wine production takes place, in the context of the territory, providing the opportunity to try gastronomic pairings with local food specialties. In addition, numerous wineries organize cultural events, such as musical performances, and entertainment shows of different types. In 2019, the participating wineries numbered 800, hosting about one million visitors and generating an important economic return from all the economic activities that relate to the event, such as accommodation facilities and restaurants.

Open-day at Wineries during harvest time (Cantine Aperte in Vendemmia) is the event that allows visitors to visit the wineries during the harvest period, according to a calendar based on the different Italian wine areas.

Open-day at Wineries on St. Martin's day (Cantine Aperte a San Martino) is the autumn event (7-11 November) that gives visitors the opportunity to enjoy the "St. Martin's summer" and to chat with winemakers about the last harvest.

Open-day at wineries during Christmas time (Cantine Aperte a Natale) is the last event of the year (in December) and it gives wine lovers the opportunity to choose, along with the wine producers, the perfect wine for Christmas presents directly.



Chalices of the Stars (Calici di stelle) is organized during the summer by the Wine Tourism Movement, in collaboration with the City of Wine Association. Wine producers offer visitors the opportunity to taste quality wines in the wineries and in the main squares of tourist localities on St. Lawrence's night, 10th August, and it involves all Italian municipalities that express the will to participate by animating them with an event that provides for the perfect combination of local wines and typical gastronomic products to make them known to Italian and foreign tourists.

A relevant reference point for wine producers and wine lovers is the “Luigi Veronelli Permanent Seminar, Association for the Culture of Wine and Food”, a non-profit association founded by the father of Italian wine critics in 1986. It aims to work for the diffusion of the technical-scientific knowledge necessary for the management of production processes, the deepening of organizational and commercial skills, the development of sensory skills and the promotion of gastronomy as a culture. The Association publishes the *Veronelli's Gold Guide to Italian Wines*, a valuable tool for professionals and wine lovers, which includes a new smartphone App in the English language that provides detailed information on 2,136 producers and over 16,000 wines.

Events concerning wine tourism play a very important role in promotion; in fact, they represent the link between producers and visitors who become involved in various initiatives, up to the direct sale of food and wine products. In Italy, this phenomenon is also widespread at the local level, with numerous festivals and fairs which offer their visitors the opportunity to deepen their understanding of history of wine products and their origins in the territory; such events assemble a large number of visitors of all types, which also includes totally uninformed people, who can turn into potential customers and visitors. Moreover, at some national events, the power of word of mouth and the opinions of those who have already been through the same experience are amplified, representing the strongest tools of communication, persuasion and attraction.

In Italy, the most important event for the world of wine is Vinitaly an international wine and spirits exhibition, born in 1967 and held annually in the city of Verona. Every year, over 4,000 wine exhibitors and around 150,000 visitors from all over Italy and the world are hosted in an area of 95,000 square meters, among which are operators of the sector, connoisseurs and visitors who are simply curious or passionate about the world of wine. Inside the fair, it is possible to participate in various tastings of Italian and foreign wines, and in numerous initiatives, including conferences that address the main issues related to the wine market and trends in supply and demand.

3. Attractiveness of Wine Tourism

Wine has emerged as discerning factor for the attraction and amusement of Italian travellers. Such interest has dramatically increased in recent years, with wine that has shifted from being simply a holiday interest to an important part of the tourist experience and among major motivators to travel (Antonioli Corigliano, 2002; Brunori & Rossi, 2000; Città del Vino e Censis Servizi, 2011; Garibaldi, 2018; 2019a; 2020; Montanari, 2009; Romano & Natilli, 2009). The concept of wine tourism has emerged as particularly important in this regard. Considering this, what are the main consumption habits and behaviour on the part of Italian travellers? And how is the offering changing?



3.1. Travel Consumption and Behaviour of Italian Travellers

For Italian travellers, wine tourism experiences are perceived among main interests: 56 % and 44 % respectively participated in visits to wineries and wine events during holidays in the past 3 years². In conjunction with wine they also seek a wide range of gastronomic activities, including consumptive, learning and entertaining experiences. Dining experiences at local restaurants serving regional or local cuisine are the most popular; high-appealing activities also comprise visits to local food markets, historical/landmark restaurants or bars, and food trucks (see Table 1). It can be argued that Italian travellers gain several experiences in conjunction with wine even within the same holiday; similar findings have also been made in international market studies (e.g. Stone *et al.*, 2016; Garibaldi, 2020).

With regards to wine tourism, half of those who visited a winery would love to find different proposals along with traditional tastings and visits, such as: purchasing local wines at special rates in the company shop (73 %), pairing local wines with gourmet dishes (64 %) and dining in the vineyards (55 %). Vineyards are places particularly appreciated, by Italian travellers that would like also to do non-wine activities, e.g. hiking and trekking, attending art classes, participating in yoga or similar relaxing activities. Other developments of the current offering comprise more engaging and active experiences: participating in the grape harvest for a day is appreciated by 47 % of Italian travellers, while having the opportunity to meet the winemaker or the owner by 46 %. This may suggest that the winery experience may be enriched with elements of learning and hedonism/entertainment.

Of all Italian travellers, two highly motivated segments with specific profile and behavioural patterns emerge: gastronomy- and wine-motivated tourists. Representing 45 % and 28 % respectively. Portraying them as high-profile individuals appears to be partly inaccurate: they generally have a higher educational level, but there are no significant differences in terms of income, status and area of residence. Both segments tend to consume gastronomic and wine offering of the destination more intensely and pursue a wider range of activities. For instance, they may dine at gourmet restaurants as well as eat at food trucks. Their travel consumption seems therefore to match with the Peterson & Simkus (1992)'s definition of 'omnivores', a group of individuals open to a great variety of activities that range from usual to novel (even if do not necessarily like everything).

With regards to their wine travels, 18 % of gastronomy and 26 % of wine-motivated tourists visited more than two wineries. Their interests lead to action, stimulating them in deepening their knowledge about wines, winescape³ as well as the culture of the place they are visiting.

They tend to use their own car, since production sites are usually difficult to reach with public transportation; however, a small group also love to go by bike, and new proposals are now arising and combine wine and bike. Historical wineries are the most appreciated by travellers, who also show a large interest towards different varieties, such as small and familiar sites that then renowned and modern-

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2 Data presented in this paragraph was purposely extracted from "Report on Gastronomy Tourism in Italy 2019" (Garibaldi, 2019a). The survey was carried out on a representative sample of 1,001 Italian travellers with Computer-Assisted Web Interview method.

3 The winescape can be defined as "a winsome combination of vineyards, wineries and supporting activities necessary for modern production" (Peters, 1997; pp. 124).



designed wineries. Regardless of the typology, discerning elements in their selection process are the opportunity to meet the owner or the winemaker and the availability of multi-sensorial experiences.

The desire to find different proposals along with traditional tastings and visits is more common in these segments than among Italian travellers, suggesting that highly motivated tourists are more demanding and have higher expectations. Gastronomy- and wine-motivated tourists would love to purchase local wines at special rates at the company shop (respectively 78 % and 83 %) and taste local wines paired with gourmet dishes (75 % and 81 %), but also to live experiences in vineyards (both related and non-related to wine). They also seek more engaging activities, such as becoming a winemaker for a day and meeting local producers.

Table 1.
Participation in wine and food experiences while travelling. Italian travellers (2018)

Experience	Italian travellers (%)
Eating at a local (not chain) restaurant serving regional or local cuisine	88
Visiting a market with local food	82
Eating or drinking at a historical/landmark restaurant or bar	72
Eating at a food truck, food cart, or food stall	70
Attending a food festival/event	67
Visiting a local farm	62
Eating at restaurant serving cuisine from other countries	58
Visiting a winery	56
Visiting a fashionable restaurant, a bar or a winery	53
Visiting a cheese factory	51
Eating or drinking in popular bar or restaurant as to meet new people	49
Attending a beer festival/event	49
Attending a wine festival/event	44
Going to a food or beverage trail/route	41
Visiting a food museum	38
Visiting an olive oil mill	37
Visiting a brewery	33
Visiting a delicatessen	30
Eating at a fine dining restaurant	29
Visiting a pasta factory	27
Discovering local food during a walking tour accompanied by a food expert	26
Visiting a chocolate factory	23
Visiting a distillery	23
Taking part in a package holiday including visits to different destinations	15
Attending a cooking class	13
Participating in a social eating experience	12



3.2. From Tasting to More Engaging Experiences: The Offering is Evolving

Italy has a highly developed winescape. An analysis at European level shows that the country comprises the highest number of certified wine products (526), with France ranking second with 436; it has 2 UNESCO World Heritage winescapes, equalling Portugal and France; it also ranks second in the number of farms with grape production (264.451)⁴. Along with these physical elements that characterize the Italian winescape, the wine tourism offering is enriched by 170 Wine Routes and 43 wine museums (Garibaldi, 2020).

From a numerical point of view, Italian wine tourism offering is relevant. However, contemporary travellers seek not only a variety of attractions, but also experiences able to meet their needs. There is growing evidence that the wine tourism industry is struggling to create new proposals, such as cultural activities and events in wineries, accommodations, wine retail outlets, etc. (Garibaldi & Pozzi, 2018; Garibaldi, 2019b). Especially in wineries, as they represent the culmination of the production process and contribute to the marketing process by allowing tourists to learn more about wine and viticulture (Antonoli Corigliano, 2002).

Along with turning into attractions for wine lovers, production sites are becoming places to experience culture. 'Rocca di Frassinello' (Tuscany) and 'Ca' del Bosco' (Lombardy), for instance, are wineries that have successfully transformed the production site into a place to experience culture; the former organizes cultural events inside the production site and has established an exhibition-museum centred on the relationship between the Etruscans and wine, while the latter has created a unique art exhibition with sculptures adorning the cellar and the vineyards. Similarly, 'Castello Banfi' is an historical cellar located in a Medieval castle as well as a place to live and Experience, with a luxury themed accommodation, two gourmet restaurants and a wine shop.

New concepts are also emerging. New modern buildings created by internationally renowned architects are going up along with 'traditional' wineries featuring historical cellars. Thanks to their impressive design, these wineries have become cultural attractions both for tourists and architecture lovers. 'Cantina Petra' (Tuscany) provides an interesting example of a winery with modern designed buildings that has become a must-see destination for people travelling in this region. In other cases, wine traditions can turn into a starting point for interpreting stories, myths and traditions of the past. Although not for tourism related purposes, the rediscovery offers the opportunity to contextualize the tourist experience by creating a link between past and present. This has happened with the 'Villa of the Mysteries project', a joint effort between local Superintendence (Authority) and Mastroberardino winery (Campania) to re-introduce viticulture in the archaeological site of Pompei. Along with its historical value, this project adds new meanings to the tourists' experience.

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4 Data refers to 2016.



4. Perspectives on Wine Tourism During COVID-19 Pandemic

The Italian wine tourism industry has quickly responded to the COVID-19 pandemic. The temporary closure of foodservice activities along with travel restrictions have raised new and unexpected challenges, with wineries that are struggling to maintain relationships with their current and potential customers and to grant revenues from sales of wine. A survey conducted in May 2020 by the Wine Tourism Movement, among 262 associated wineries, revealed that 87 % of those interviewed claimed that they had been seriously affected by the COVID-19 crisis. For almost all respondents (91 %), sales and distribution were the activities most affected, due to the closure of both direct sales and Ho.Re. Ca. channel. Wine tourism activities followed for 84 % of respondents. At the beginning of the crisis, half of the wineries interviewed were already equipped with an online sales and distribution service, while about 50 % of those that had not activated it previously, decided to acquire this service during the emergency; 70 % of those interviewed agreed on the importance of an online sales system that allows expanded offerings and visibility. In addition, the wineries agree on the strategic importance of wine tourism to overcome the economic crisis resulting from the COVID-19 pandemic (Garibaldi & MTV, 2020).

The current context is dynamic. The crisis has certainly affected the entire sector, with a huge loss from sales to foodservice and, to a lesser extent, of tourist services. However, wineries are attempting to partially mitigate economic damages by improving Direct-To-Consumer activities whenever possible. Wine sales in Italian mass retail channels increased by 7.9 % from January to mid-April 2020 compared to the same period of 2019 (IRI, 2020), while online sales have boomed, doubling in March 2020 (Dell'Orefice, 2020). A growing number of wineries are shifting their sales to online channels. The COVID-19 pandemic has certainly accelerated this phenomenon, which had emerged in the previous years although to a lesser extent than in other markets and it is conceivable that these channels will be also significant in the future.

Along with Direct-To-Consumer solutions for delivery and sales, innovative and technology-based concepts have emerged all over the country. Wineries have developed and promoted new home-based experiences with the twofold purpose of maintaining relationships with their customers and stimulating them for future onsite visits. Digital wine tastings with participants that can pre-order a pack of vintages or 'wine + food' boxes, live events (via Facebook, Instagram, YouTube) with the owners and winemakers are examples of how the wine tourism industry is attempting to overcome these unexpected constraints. These remote experiences are becoming more sophisticated, with many wineries doing online surveys during digital tastings as to collect impressions from participants, understating all valuable information that can be used for customer segmentation and Direct-To-Consumer marketing activities.

Even wine festival organizers have rethought their formats with the use of technology. The popular wine festival *Open-day at the Wineries* (Cantine Aperte) (30th and 31st May 2020) brought people to discover Italian wineries and wines safely at home. Participants were allowed to pre-order vintages directly from *iorestoacasa.delivery*, an online platform for selling food and wine products that was set



up during the COVID-19 pandemic; the two-day festival was entirely online, with people that attended live tastings, online masterclasses, remote social drinking (MTV, 2020).

Since the beginning of the so-called 'Phase 2' (the reopening after the lockdown), the digitalization of winery services (e.g. online delivery, home-based experiences, etc.) has been implemented contributing to reinforcing the entire sector. The wine tourism industry has also started to welcome tourists again in safety: with the need of to observe social distancing that has limited onsite visits to small-sized groups, wineries have created open air experiences in vineyards to be offered along with indoor visitations.

To conduct wine tasting in total safety in the cellar, the National Confederation of Voluntary Regulatory Councils for the Protection of the Italian Wines Designations (Federdoc) has issued a handbook containing the rules that wineries and visitors must follow.

At the end of May 2020, during "Phase 2", The Association Movimento Turismo del Vino and Roberta Garibaldi presented the international protocol "Quiet Wine Tourism: guidelines and good practices for a Covid-Free wine tourism". The protocol was developed by international food and wine experts and wine tourism bodies worldwide, with the aim of identifying solutions that can be harmonized with local rules and regulations of each winery in the new context determined by the COVID-19 pandemic. The protocol can be a guide for wineries and other wine tourism players to adapting structures and reception services, giving priority to the care and safeguarding of people's lives (Garibaldi & MTV, 2020).

5. Final Remarks

Technological and organizational innovation is the basis for the relaunch of wine tourism which will represent a strategic economic activity to counter the drastic drop in sales and distribution of wine because of COVID-19 crisis. Producers have resorted to innovative tools, starting with digitalization, accelerating the adoption of e-commerce and activating online initiatives. The use of innovative technologies is fundamental for the realization of storytelling-based communication strategies by wine companies, integrated with innovative communication and customer care tools through the web and social media. In such context, the approach towards the local tourists becomes fundamental, as the proximity destinations and geographically close markets will have a leading role, given that they will be the first to be affected by the return of tourism.

Investments in online marketing and the use of modern technologies in the design of new ways of visiting will be integrated with sustainable development strategies for the wine tourism area in accordance with one of the key objectives of the "European Charter of Wine Tourism". It was developed by the partners of the Vintur project, an association that works to develop strategies and tools for the development of wine tourism in Europe. The Charter significantly promotes cooperation and collaboration between the different players involved and includes among its main objectives the development of a long-term strategy with a specific definition of activities for territorial development.

Despite the progress made and the great potential, in Italy wine tourism is still hampered by critical issues related mainly to the organization in the design of the wine tourism offer by wineries, to



the professional training of entrepreneurs and reception staff, and to the construction of a network of relationships between the various public and private entities in the area. Finally, the absence of a national ministry for tourism and the attribution of responsibilities in this matter to the regions, determine the absence of a single strategy of promotion of wine tourism, as an Italian brand, with the result of discordant promotion initiatives and the risk of ineffective and inefficient use of public resources by local authorities.

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Tourism and its Economic Impact in German Wine Regions

Maximilian Tafel and Gergely Szolnoki
Hochschule Geisenheim University (Germany)

Abstract

This chapter examines wine tourism across all 13 German wine regions, including both the tourists' and the wineries' perspectives. For this purpose, findings from three national studies were combined. The results show that 7.2 million wine tourists, of whom 89 % are German, visit German wine regions each year. They produce an economic impact of 5.0 billion euros, which generates income for 71,846 people. From an average winery operator's perspective, 24 % of total company sales can be attributed to wine tourism. Wineries have experienced an increase in demand in recent years, especially those in proximity to large cities. The main challenges are to coordinate collaboration among stakeholders, stop the ongoing decline in restaurants and wineries and preserve cultural landscapes such as the steep slopes which play an important role in attracting visitors. This work can be seen as a starting point for achieving sustainable development in German wine regions.

1. Introduction

Wine growing in Germany has a tradition that dates back more than 2,000 years (Wines of Germany, 2019). Germany is also the no. 1 European country in terms of tourism revenue: in 2018, the contribution of the travel and tourism sector amounted to 291 billion euros (including indirect effects), of which 85 % could be attributed to domestic tourism (WTTC, 2019). According to the World Tourism Organization, the "greatest wine tourism destinations receive visitors from their domestic markets" (UNWTO, 2019, p. 4).

Wine tourism in Germany, as in other European countries, has been neglected for a long time (Gomez *et al.*, 2018). In the last 10 years, the German wine industry has realized the benefits wine tourism can offer (Szolnoki, 2018), e.g., in terms of regional development and the preservation of cultural heritage (UNWTO, 2017). Parts of this heritage are the wineries themselves, many of which are family businesses that have been handed down through generations (Koch *et al.*, 2013). Unfortunately, wineries are experiencing a sharp decline in numbers (Wines of Germany, 2019).



Germany, as a large tourism market with a high percentage of domestic tourism, seems to be ideal for implementing a national wine tourism strategy. However, the country currently lags behind other countries in terms of academic research in this field (Sánchez *et al.*, 2017). Therefore, three national studies were conducted in 2017 and 2018 in a joint project by Wines of Germany and Geisenheim University. It was the aim of the project to measure the economic impact of wine tourism in Germany, to investigate visitors' characteristics, and to understand the wineries' perspective. The results have been summarized in three scientific journal publications.

This chapter summarizes the findings from these studies and complements them with additional exclusive research results. Therefore, an overview of the current state of wine tourism in Germany is given, and the understanding of this niche market is improved. Insights into the German wine tourism market can help to achieve sustainable regional development in German wine regions. Furthermore, they can inspire researchers and stakeholders from other countries to create innovative, sustainable wine tourism models.

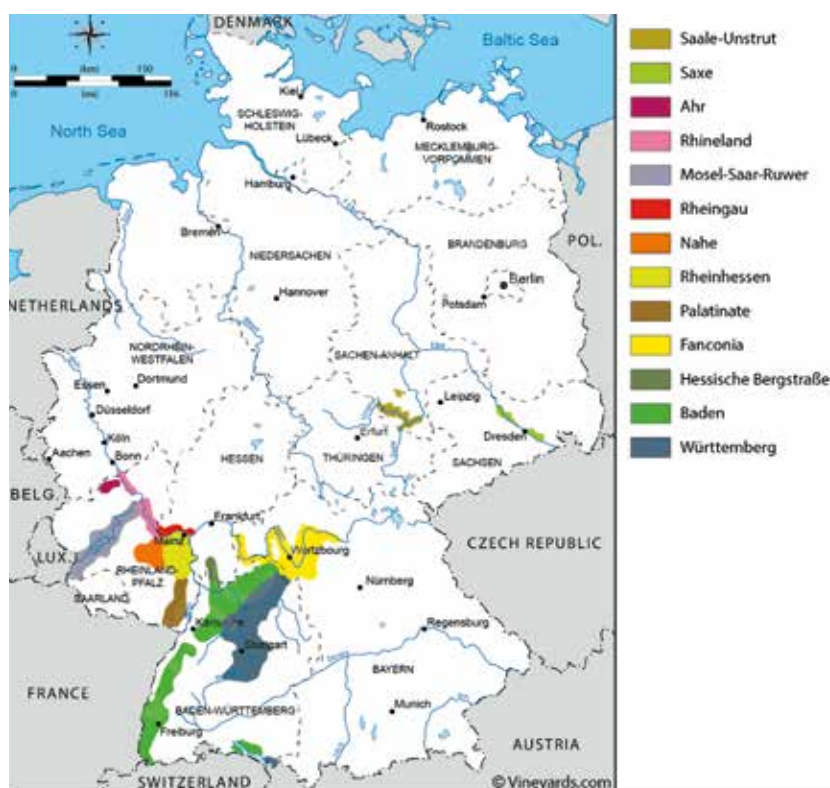
2. The Context and Evolution of Wine Tourism in Germany

There are 13 German wine regions that, given a wine-growing area of about 100,000 hectares, produce around 9 million hectoliters of wine each year. This makes Germany the fourth-largest wine producer in Europe, after Italy, France, and Spain. With around 20 million hectoliters of consumed still wine, of which about 45 % are German wines, the country has one of the highest wine consumption in the world (behind the USA, France and Italy). Production and consumption have both remained steady over the past five years. In terms of volume, Germany is the largest wine importing country in the world. However, both exports and imports, in terms of volume, appear to be slightly decreasing (Wines of Germany, 2019).

Germany has a unique standpoint from the perspective of wine tourism. Some of the world's first wine routes were established in Germany in the 1920s, with the aim of explaining and therefore selling German wine. By the end of the 1970s, all German wine regions had their own wine routes (Hall *et al.*, 2000). Today, wine routes are recognized as an effective tool for wine tourism development since they help to connect different sectors and therefore further regional collaboration among stakeholders (Gomez *et al.*, 2018). Hence, Germany's progressiveness has influenced many other countries in this regard (Hall *et al.*, 2000). Unfortunately, most of these wine routes, such as the Mosel Weinstrasse, faded into nonexistence. The reasons for this remain unknown and are probably hard to identify.

For successful development of wine tourism, collaboration among stakeholders is crucial (UNWTO, 2017; Alonso *et al.*, 2013). In this context, horizontal and vertical collaboration are important, as well as government support (Wargenau and Che, 2006). In 2008, Wines of Germany began to collaborate with Germany Travel (Müller and Dreyer, 2010). Furthermore, the German Society for Tourism Research founded the Commission for Wine and Culinary Tourism in 2009 (Dreyer, 2011). Clearly, the willingness to collaborate at the national level exists. What is still missing is governmental support at the national level. Wine tourism has yet to find its place in the country's national tourism strategy.

Figure 1.
Map of the German wine regions



Source: Vineyards.com (2020).

Wineries are central stakeholders in wine tourism. As in other European countries with a long history of wine production, Germany has a vast number of wineries. However, between 2010 and 2016, their number dropped from 20,558 to 15,931 (Wines of Germany, 2019). German wineries have long put their focus on producing wine, and even though they have sold wine directly to travelers, the significance of wine tourism itself has long been neglected (Job and Murphy, 2006). In recent years, German winery operators have realized the potential that lies in wine tourism and have begun to add touristic services. Many of the wineries are small family businesses that aim to sustain their ancestors' businesses through wine tourism (Koch *et al.*, 2013).

Wine tourism is a fundamental part of gastronomy tourism (UNWTO, 2017). Many researchers have found that wine tourists seek not only wine but also culinary experiences in general (e.g. Alant and Bruwer, 2004). In Germany, there is a unique, authentic culinary experience called *Strausse*. *Strausse* means that wineries can, by law, employ gastronomic services for a maximum of four months (either continuously or for two periods per year) without paying taxes for a restaurant business. Visitors can taste wines directly from the winemaker, detached from the classic wine tasting, and get to know the culinary specialties of the region at the same time. As a sign that a *Strausse* is open, the winegrower hangs a bouquet, broom, or wreath on the gate (German "*Strauß*" = bouquet). It is an important part of the German wine culture and probably dates back to Charlemagne (Wines of Germany, 2020). One can only estimate how many *Strausses* there are in Germany - a few hundred, at least. The reason



for this is their individual design and the German restaurant law, which gives the Strausses great freedom. The term “Strausse” varies from region to region, other terms being Straußwirtschaft, Rädle, Besenwirtschaft, Kranzwirtschaft, and Heckenwirtschaft (Wines of Germany, 2020).

There are scientific publications on wine tourism in Germany that date back to the 1990s. Jätzold (1993), for example, mentioned that wine tourism in Germany is a part of its gastronomic cultural tourism (Müller and Dreyer, 2010). This was long before Hall *et al.* (2000) ranked European wine tourism among cultural tourism or before the World Tourism Organization acknowledged wine tourism to be a part of gastronomic tourism (UNWTO, 2017). Still, it took more than ten years for wine tourism to really gain broader research interest. In 2010, Müller and Dreyer (2010) published an influential book called *Weintourismus - Märkte, Marketing, Destinationsmanagement* (English: *Wine tourism - Markets, Marketing and Destination Management*). The authors provided much information about the wine tourism sector in German-speaking countries. Other authors that should be mentioned in the context of wine tourism in Germany and scientific publications are Scherhag (2013), Rüdiger and Hanf (2017), Kagermeier (2011), Orth and Stöckl (2011), and Szolnoki (2018).

Most scientific publications about wine tourism in Germany are published in German; examples of international journal publications are scarce. Sánchez *et al.* (2017) found that Germany ranks seventh in terms of international authorships in Europe. This is quite low, considering that tourism in Germany has the greatest economic impact on the continent (WTTC, 2019) and that Germany currently ranks fourth in terms of wine production (OIV, 2019).

One example of the few international publications about wine tourism in Germany was authored by Job and Murphy (2006). The aim of their work was to provide an overview of the main challenges of the Mosel Valley, especially in regard to the cultural landscape, by conducting interviews with stakeholders in the wine and tourism industry. The authors concluded that tourism is an “integral and indispensable component of any future cultural heritage conservation strategies” (Job and Murphy, 2006, p. 333). Later, Koch *et al.* (2013) found that the predominantly small German wineries sustain their families’ businesses through tourism, thereby helping to preserve aspects of the country’s culture.

In Germany, there is currently no study on the phenomenon of wine tourism conducted on each of the 13 German wine regions. The most effective way of showing the importance of tourism is by estimating its economic impact on the regions. However, in order to evaluate the economic effects, wine tourists must be differentiated from tourism in wine regions in general. Therefore, the first aim of this book chapter was to determine the share of wine tourists in each region. Second, the economic impact of wine tourism was assessed. Third, the largest category, wine tourism development, with 35 % of all publications (Gomez *et al.*, 2018), is discussed to derive both academic and managerial implications for enhancing the wine tourism product in Germany.

3. National Wine Tourism Study

To investigate the characteristics and importance of wine tourism in Germany, Wines of Germany started a collective project with Geisenheim University in 2017. The project included three different studies that were conducted in parallel across each of the 13 German wine regions. Of these three



studies, one was a tourist survey, while the other two focused on investigating wine tourism from the producers' perspective (see Table 1).

Table 1.
Overview of data collected

Region	Quantitative face-to-face tourist survey	Quantitative online winery survey	Qualitative in-depth winery survey
Ahr	282	13	15
Baden	299	37	15
Franconia	261	55	15
Hessische Bergstraße	354	4	15
Middle Rhine	371	30	17
Mosel	312	163	15
Nahe	260	50	15
Palatinate	461	116	15
Rheingau	619	42	17
Rheinhessen	402	137	15
Saale-Unstrut	255	13	15
Saxony	280	3	15
Württemberg	318	37	15
Unknown	-	3	-
Total	4,474	703	199

Source: Own survey.

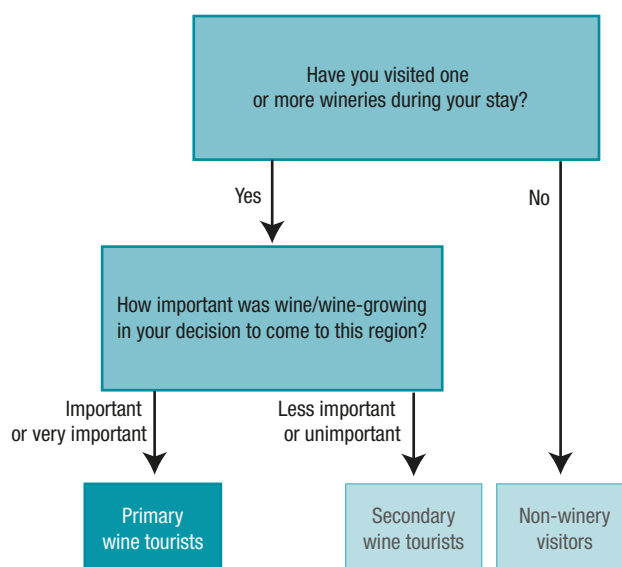
The tourist survey aimed to determine the share of visitors to wine regions that can actually be called wine tourists and to discover differences between wine tourism and other tourism segments. Therefore, not only wine tourists, but tourists in wine regions in general were interviewed at wine-neutral locations such as city centers or cultural sites. Since most previous research on wine tourist behavior has focused on interviewing winery visitors, the study provided a different approach. In total, 4,472 visitors were interviewed in all 13 German wine regions.

For the analysis, visitors to German wine regions were segmented by introducing a novel two-step segmentation approach. First, the respondents were clustered into two groups according to whether or not they had visited or were still expecting to visit one or more wineries during their current trip. Those who visited a winery were then asked to state the relevance of wine/winemaking in their travel motivation on a Likert scale from 1 to 5, 1 meaning "irrelevant" and 5 meaning "very important". If winery visitors checked 4 or 5 in this question, thereby stating that wine/winemaking played at least an important role during the trip for them personally, they belonged to the segment of Primary Wine Tourists. The rest of the winery visitors, who did not consider wine/winemaking an important factor in their trip, were consequently classified as Secondary Wine Tourists. In the end, there were three tourist segments that played a role for the rest of this paper: 1) Primary Wine Tourists; 2) Secondary Wine Tourists; and 3) Non-Winery Visitors or Non-Wine Tourists (see Figure 2).



To determine whether there were significant differences among the segments, Chi-square analyses and one-way analysis of variance (ANOVA) tests were carried out. The findings about Primary Wine Tourists matched other researchers' results (e.g. Charters and Ali-Knight, 2002) of the highly involved wine tourist segments (mostly referred to as "wine lover") in terms of higher educational levels and income, etc. Therefore, the segmentation approach could be seen as valid, which allowed differentiating between wine tourists and other tourist segments. The authors called Primary Wine Tourists the "real" wine tourists (Tafel and Szolnoki, 2019).

Figure 2.
Segmenting travelers to German wine regions



Source: Tafel and Szolnoki (2019).

To calculate the economic impact of wine tourism, respondents of the tourist survey also provided information about the duration of their stay, visitor type (overnight visitor vs. day-tripper), type of accommodation, and daily travel expenditure for accommodation, gastronomy, entertainment, food, wine, and "other/rest". The economic impact of tourism in German wine regions and, consequently, wine tourism was determined by multiplying visitation days with the average daily expenditures of each tourist segment.

Results showed that tourism in German wine regions has an economic impact of 26.4 billion euros. Of all tourist visitation days, 13 % were produced by (primary) wine tourists. The estimated number of wine tourists in Germany is 7.3 million. Due to significantly higher travel expenses, they produced an above-average economic impact of 19 %. Hence, wine tourism in Germany has an economic impact of 5.0 billion euros, providing 71,846 people with a potential direct or indirect income (Tafel and Szolnoki, 2020).



To include the wineries' perspective, two surveys were conducted in parallel using a mixed-methods framework, in which 199 qualitative in-depth interviews and 703 quantitative online questionnaires were collected and analyzed. It was the aim of the winery survey to discover the relevance and challenges of wine tourism. The respondents reported increased demand for wine tourism activities, particularly those that are close to large cities. For those who offer tourist services, wine tourism accounts for 24 % of company sales. Company size directly influences company sales: the smaller the winery, the more important wine tourism offerings are for profits. Results from the qualitative survey revealed that for some respondents, their family's subsistence depends mainly on income generated by tourism (Tafel and Szolnoki, 2020).

Of the 703 respondents from the online survey, 601 (85.5 %) reported that they were engaged in tourism activities. On average, the winery operators began offering tourist elements in their business 22 years ago, confirming that wine tourism is a relatively new phenomenon in Germany. Respondents estimated that 89 % of their visitors were Germans. Despite an increasing demand in wine tourism activities, the number of wineries and restaurants is declining, which reduces the attractiveness for culinary-focused wine tourists. To successfully develop wine tourism in Germany, there is a clear need for collaboration among stakeholders. Furthermore, the protection of cultural landscapes plays an important role in attracting visitors. Appropriate strategic decisions backed by governmental support may help to enhance Germany's developing wine tourism industry, thereby preserving cultural heritage and strengthening some of the country's structurally disadvantaged rural areas (Tafel and Szolnoki, 2020).

4. Analyzing Visitor Characteristics and Travel Motivation

After segmenting respondents by travel motivation and wine activities, 13.9 % could be labeled as Primary Wine Tourists. The Secondary Wine Tourists category comprised 13.3 %, and the remaining 72.7 % were Non-Wine Tourists. The final data set included 4,474 tourists in all 13 German wine regions (see Table 2).

No significant difference was found in the average age of the formed segments. As shown in Table 3, there was only a slight tendency for Primary and Secondary Wine Tourists, with an average age of 49 years, to be slightly older than Non-Wine Tourists. As already mentioned above, higher educational background and higher income levels were positively correlated with on Primary Wine Tourists.

As described in Table 4, the landscape was the most important reason to visit a German wine region, with 42.3 %. Across all 13 wine regions, wine did not seem to play as big a role as expected. Relaxation was slightly more important (29.1 %) than wine (28.8 %). For Primary Wine Tourists, wine (65.4 %) was more important than the regional landscape (45.6 %). Also, the pleasure of pairing food with wine (34.6 %) was more important than for the other segments (24 %).



Table 2.
Sample of the tourist survey

	Total study	Visitor Group		
		Primary wine tourists	Secondary wine tourists	Non-wine tourists
N	4,474	624	596	3,252
Percent	100.0	13.9	13.3	72.7

Source: Own analysis.

Table 3.
Age of the respondents

	Total study means	Visitor Group			ANOVA	
		Primary Wine Tourists Means [n=624]	Secondary Wine Tourists Means [n=596]	Non-Wine Tourists Means [n=3,252]	F	Sig.
Age	47.8	48.8	49.1	47.4	3.666	0.260

Source: Own analysis.

Table 4.
Travel motivation

	Total Study	Visitor Group			χ^2	Sig.
		Primary Wine Tourists % [n=624]	Secondary Wine Tourists % [n=596]	Non-Wine Tourists % [n=3,252]		
Nature/landscape	42.3	45.6	47.5	40.7	12.47	0.002 ^{**}
Relaxation	29.1	26.2	32.3	29.1	5.30	0.071
Wine	28.8	65.4	30.9	21.2	486.95	0.000 ^{***}
Pleasure/food and drinking	25.5	34.6	23.6	24.0	31.28	0.000 ^{***}
Being together with people	18.8	19.2	15.9	19.3	3.78	0.151
Hiking or bicycling	17.9	17.9	21.1	17.2	4.85	0.088
Cultural activities	17.8	14.1	17.4	18.6	7.09	0.029 [*]
Visit friends or relatives	17.2	15.2	15.4	18.0	4.25	0.119
Get to know something new	15.8	11.3	16.4	16.6	10.85	0.004 ^{**}
Happiness with former visits	10.4	9.3	10.2	10.6	0.89	0.643
Coincidence	6.1	2.5	9.0	6.3	22.60	0.000 ^{***}
The region's prestige	4.7	4.8	6.0	4.4	2.83	0.243
Business trip	3.1	2.3	2.8	3.3	1.79	0.408
Other	9.7	5.2	7.9	10.9	20.66	0.000 ^{***}

^{*}, ^{**}, ^{***} Significant at the .05, .01, and .001 levels.

Source: Own analysis.

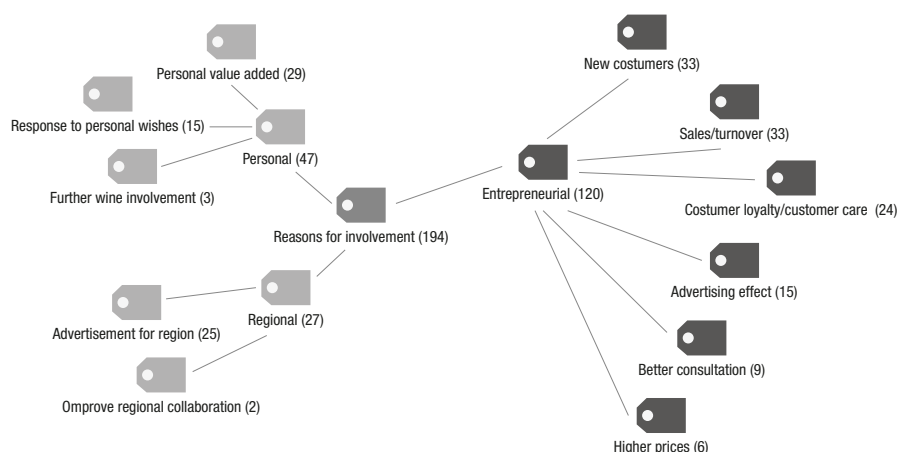
5. Why do German Wineries Engage in Wine Tourism?

There are many potential reasons for wineries to get involved in wine tourism. While one winery operator seeks to maximize profits, others pursue lifestyle goals (Dawson *et al.*, 2011). This can lead to problems within wine regions and thus lower willingness of wineries to cooperate with each other. In addition, as mentioned by Fraser and Alonso, “not every grower will necessarily want to be involved, and indeed may not be able to afford to become involved” (2006, p. 19). The results presented below indicate the most important reasons for wine tourism involvement from a winery operator’s perspective. The results of the in-depth interviews were produced at the personal, entrepreneurial, and regional levels (see Figure 3).

The most frequently mentioned personal reason for employing a tourism strategy was to provide the guests with personal added value ($n=29$). Often, the strategy was steered increasingly in the tourist direction because they had been asking for it. Therefore, responding to customers’ personal wishes ($n=15$) was another important reason. In addition, respondents mentioned that they wanted people to become familiar with the topic of wine ($n=3$).

At the entrepreneurial level, the most important reasons for a tourist company orientation were the acquisition of new customers ($n=33$) and the increase in turnover or sales ($n=33$). In addition, the interviewees wanted to achieve better customer loyalty and customer care through personal contact ($n=24$) at the production facility. Of the 199 respondents, 15 indicated that the chosen corporate strategy aimed for a positive advertisement and image effect through satisfied customers and positive word-of-mouth ($n=15$). Another reason for the tourism strategy was that customers could receive better consultations ($n=9$). The final operational reason was related to the company’s pricing structure. Respondents hoped that more intensive work directly with customers would lead to higher bottle prices ($n=6$).

Figure 3.
Personal, entrepreneurial, and regional reasons for participating in wine tourism



Source: Own analysis.



At the regional level, the most important reason for choosing a tourism strategy was to bring the region closer to the guests and thus increase the region's fame ($n=25$). In addition, respondents hoped to improve regional cooperation ($n=2$) by adopting a tourism strategy.

6. Impact of Gastronomic Services on Winery Company Sales

Since gastronomy is an important topic in wine tourism, further investigation was warranted. It was therefore examined whether the employment of a restaurant or a Strausse would have an effect on direct wine sales to tourists and/or the share of total company sales that could be attributed to wine tourism offers. Of a total of 703 respondents to the online survey, 601 (85.5 %) employed wine tourism strategies. Of those, 85 (14.1 %) ran a restaurant and 125 (20.7 %) ran a Strausse. The rest did not offer gastronomic services.

As Table 5 illustrates, wineries that ran a restaurant earned 22.5 % of their company's turnover through direct wine sales to tourists. This was significantly higher than wineries that did not have a restaurant (12.9 %). Generally speaking, if a restaurant was present at a winery, the share of sales that could be attributed to tourism services was significantly higher (35.9 %) compared to wineries that did not run a restaurant (22.6 %).

Table 5.
Impact of a restaurant on company sales

Share of Company Sales	Total Study Means % [n=601]	Restaurant		ANOVA	
		Yes	No	F	Sig.
		Means % [n=85]	Means % [n=516]		
(Total) cellar door sales	42.8	49.1 ^a	41.8 ^b	5.231	0.023*
x share of cellar door sales to tourists	31.0	40.3 ^a	29.5 ^b	10.948	0.001**
= (total) cellar door sales to tourists	14.3	22.5 ^a	12.9 ^b	23.576	0.000***
All wine touristic offerings	24.4	35.9 ^a	22.6 ^b	28.628	0.000***

*, **, *** Significant at the .05, .01, and .001 levels.

Source: Own analysis.

The same tendency was found for the case of offering a Strausse. As shown in Table 6, the existence of a Strausse led to a higher share of company wine sales, which could be attributed to direct wine sales to tourists. Wineries that offered Strausses earned significantly more through direct wine sales (19.6 %) than wineries that did not offer a Strausse (12.9 %). Also, the share of company sales that could be attributed to tourism services (including wine parties, winery tours, hiking tours, etc.) was higher for those offering a Strausse (34.6 %) compared to those that did not (21.8 %).



Table 6.
Impact of a Strausse on company sales

Share of company sales	Total Study Means % [n=601]	Strausse		ANOVA	
		Yes Means % [n=125]	No Means % [n=476]	F	Sig.
(Total) cellar door sales	42.8	53.3 ^a	40.1 ^b	24.1	0.000***
x share of cellar door sales to tourists	31.0	35.3	29.9	3.5	0.062
= (total) cellar door sales to tourists	14.3	19.6 ^a	12.9 ^b	15.6	0.000***
All wine touristic offerings	24.4	34.6 ^a	21.8 ^b	36.4	0.000***

*** Significant at the .001 level. Differences occurred between a and b.

Source: Own analysis.

It is clear that employing gastronomic services entailed a greater workload for a winery. In Germany, however, a Strausse offers a way to provide food to visitors without registering a restaurant business with the authorities and without paying taxes. Interestingly, when comparing the results displayed in Tables 5 and 6, it becomes evident that a Strausse, in terms of wine tourism's contribution to company sales, has a similar impact to employing a "real" restaurant on site. This is impressive, considering that a Strausse is only allowed to open for four months per year.

7. Conclusions

Tourism in German wine regions, including indirect effects, has an economic impact of 26.4 billion euros. This is about 9.4 % of the direct and indirect economic impact of tourism in Germany. Of all the visitors to German wine regions, 14 % can be called wine tourists. Due to higher travel expenses, especially for wine and gastronomic services, they produce 19 % of the overall economic impact of tourism in German wine regions, which is 5.0 billion euros. This makes wine tourism generate income for 71,846 people in Germany (Tafel and Szolnoki, 2020).

Demand for wine tourism services has increased in recent years, especially for wineries that are located close to large cities. In this regard, Germany seems to act in the same manner that has been seen around the globe (e.g., Baird *et al.*, 2018). What distinguishes Germany from other countries is the importance of domestic tourism. The same appears to be the case in German wine tourism. Winery operators have estimated that domestic visitors account for around 89 % of their tourism footfall. Thus, wine tourism in Germany appears to offer urban citizens a means to escape hectic city life and enjoy the rural vineyards in their surrounding regions. According to UNWTO (2017), this makes Germany a highly attractive wine tourism market.

From the perspective of an average winery, 24 % of company sales can be attributed to wine tourism. The smaller the company, the more important the employment of wine tourism services. For the smallest wineries, the subsistence of the families behind the companies relies strongly on wine



tourists. Wineries employing gastronomic services not only earn relatively more money through wine tourists, but they also sell significantly more wine directly to tourists. The main challenges are to coordinate collaboration among stakeholders, to stop the ongoing decline in restaurants and wineries, and to preserve cultural landscapes such as the typical steep slopes.

For the average traveler to German wine regions, landscape (42.3 %) and relaxation (29.1 %) are the most important travel motivators. Wine is the third most important travel motivator, at 28.8 %. Of all tourists in German wine regions, 14 % can be called “real” wine tourists (Primary Wine Tourists). For them, wine is the most important motivator (65.4 %). In addition, compared to the other segments, the joy of pairing food and wine is significantly more important (34.6 %). Contrary to previous study results (Tafel and Szolnoki, 2019), wine tourists in Germany are not significantly older than other tourism segments.

Of respondents to the online winery survey, 85 % employed tourism strategies. In terms of length of involvement, with an average of 20 years’ engagement, German wine tourism is a relatively new phenomenon; this is especially striking considering the 2,000-year-old wine-producing tradition and culture the country boasts. The motivation of winery operators to employ tourism services can range from strictly entrepreneurial reasons (e.g., profit maximization) to personal reasons, such as fulfilling/realizing a dream. The most important entrepreneurial reasons to engage in wine tourism were found to be gaining new customers and maximizing profits. In addition, winery operators wish to bond with their clientele to create greater customer loyalty. From a personal point of view, they want to provide visitors with an additional benefit and are open to suggestions from clients in order to satisfy their needs. At the regional level, they want to raise the region’s fame and further regional collaboration.

Collaboration among stakeholders is perhaps the most important pillar for the successful development of wine tourism. One way to achieve this is to create wine routes (Gomez *et al.*, 2018). Germany was one of the first countries in the world to develop wine routes. By the end of the 1970s, each of the German wine regions had its own wine routes (Hall *et al.*, 2000). Today, however, this is no longer the case. It is difficult to identify the reasons why these wine routes faded into nonexistence. It is possible that regions were not aware of the positive impacts these routes could have produced if they had been maintained. Revitalizing this important cultural heritage could have widespread positive impacts.

A Strausse enables visitors to experience an authentic German wine tradition that dates back to the ancient times of Charlemagne (Wines of Germany, 2020). One major finding of this work is that running a restaurant and a Strausse has a similar impact on German wineries’ company sales. This is quite impressive, considering that wineries can only open a Strausse for up to four months per year and do not suffer the bureaucracy, regulations, and taxes that restaurants must deal with. It could be that the time limitation creates a seasonal exclusivity which encourages the desire to visit such a unique gastronomic experience. Wine tourists are prone to combining local wines with local dishes and paying significantly more money for the gastronomy experience. Hence, wineries can not only maximize profits through a Strausse, but they can also gain new customers. It is a unique way for wineries to sell more wine and even generate an additional revenue stream.

This work has again proven that wine tourism and gastronomy are heavily intertwined. It could have widespread implications for efficiently targeting different tourism segments. German wine regions can



maximize profits through wine tourism, and sustainable regional development could be achieved. In addition, other countries can benefit from the insights given in the German wine and tourism market. Especially in other European countries that have similar characteristics (e.g., regarding the numbers of wineries and long-lasting traditions), the implication of similar concepts could have positive impacts in terms of creating jobs, preserving cultural heritage, etc. This could help in embracing the continent's wine tradition and achieving sustainable tourism development in European wine regions and maybe also in New World wine countries, regions, or continents.

8. Wine Tourism in Germany and COVID-19

As in other countries, tourism in Germany is one of the sectors, most affected by the Corona Pandemic. This has also had a massive effect on wine tourism and sets all activities in this field back to zero. Many destinations have closed down entirely for tourists including the riverbank of the Rhine, which is very famous for its bike-trips. Thus, visitors, who used to be the “kings” of the regions became, in the context of the struggle against the pandemic, unwelcome persons. Since March, April and May are important tourist months, wineries are suffering greatly from the lockdown. There are, however, positive examples on how to overcome this critical state, such as offering free deliveries and shipping, or creating online chats between winemakers and the customers. Online sales of wine have tripled since the beginning of the pandemic. This of course does not compensate the amount of losses, but it gives perspective to the companies' economic survival. Based on the calculation of economic impact, we estimate that the German wine tourism industry including hotels, restaurants, travel organizations, local shops and other services has suffered a loss of 1.5 billion euros from March until mid-May due to the Corona Pandemic.

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Wine Tourism in Hungary

Zoltán Szabó, Gedeon Totth & David Harsanyi

Budapest Business School University of Applied Sciences (Hungary)

Abstract

Tourism has been a leading sector in Hungary over the last decade, with the most impressive and the fastest growth levels. The possibilities of wine and gastrotourism are excellent in the country, with a long tradition of gastronomy and wine culture.

The Hungarian Tourism Agency (MTÜ) has been responsible for the growth of wine tourism marketing since 2019. The Agrimarketing Centre (AMC) is in charge of Community wine marketing while the National Council of Wine Communities (HNT) is liable for wine industry policy. There are five wine festivals in Hungary, that have reached or exceeded 20 % awareness among wine consumers. Budapest Wine Festival is the best-known and the most important wine event in Hungary therefore it will be described and analyzed based on primary surveys.

The chapter provides an insight into the data and information collected during continuous primary research work between 2004 and 2019. It must be stated that simply wines are not enough to attract and keep visitors in the field of wine tourism and events. Added services like aesthetic issues of natural and man-made environment are as important as cultural programmes, or stage performances.

1. Introduction. Tourism in Hungary

In the last decade, tourism has become a leading industry, having seen the most impressive and the fastest pace of growth in Hungary (MTÜ, 2017). In 2007 the tourism-related industries had a direct contribution of 5.9 % to GDP, according to Magyar Turizmus (MT, 2012). The 2008-2009 economic crisis caused only a short-term decline in the sector, which has resulted in continuously improving indicators since 2010, and this trend has been characteristic for both foreign and domestic tourism (MT, 2012). The enhancement of domestic tourism was significantly encouraged by the implementation of the Széchenyi Pihenőkártya (Széchenyi Relaxation Card; SZÉP card) in 2011 as part of the fringe benefits, which, in addition to encouraging a healthier lifestyle and ensuring general well-being, directly promoted domestic travel (MT, 2012). Between 2010 and 2019 the number of guests and guest nights increased by 50 %, which resulted in a two-and-a-half-fold increase in accommodation fee revenues (MTÜ, 2019).



In 2018, the contribution of tourism to GDP was 6.8 %, but taking indirect effects into account, this figure reached 10 %, which positions Hungarian tourism above the global average in terms of its GDP contribution. The number of jobs in the tourism sector reached 428,000, with tourism directly generating 10.0 % of domestic jobs and, considering the effects of auxiliary activities, it accounted for 13.2 % of employment in the national economy (MTÜ, 2020a). The number of commercial establishments approached 350 thousand, the room capacity utilization reached 50 %, of which the hotel room capacity utilization was more than 60 % (MTÜ, 2020b). In terms of guest nights spent in commercial accommodation in 2018, important sending countries were the Czech Republic, Poland, Italy and Russia, in addition to the neighbouring countries; Germany, which sent the most guests overall, more than 2 million and the United Kingdom with over 1 million guest nights.

The increase of SZÉP card expenditures was 34 % in the case of boarding houses (hotels) and almost 50 % for hotels (MTÜ, 2019). As for the domestic tourist motivations of Hungary's population, almost half of the trips (46.4 %) were holiday making, relaxation and having a rest closely followed by seeing family and acquaintances (VFR, Visiting Friends and Relatives), with 41.3 %. Further motivations comprised, of course, a much smaller part of the purpose of travel, but the third place was occupied by preserving health although with only 4.7 % (MTÜ, 2018). Overall, as a result of concerted and systematic sectoral changes, Hungarian tourism has dramatically developed in recent years, contributing to a definite improvement in Hungary's identity and becoming a major tourist destination in Central Europe.

Hungary's tourist offer does not have a single distinctive feature that could position the entire sector of tourism. At the same time, it may display several elements which are suitable for generating both foreign and domestic tourism. Tourism product offer can be divided into 8 groups. Sometimes each group can be logically connected to each other, resulting in a kind of synergistic effect. In addition to Budapest, 7 other products represent the Hungarian tourism offer. (MT, 2013) Of them, health tourism is of utmost significance, taking advantage of the increasingly growing need for fitness and wellness facilities. Hungary is very rich in medicinal waters and many historic "spa towns" add some colour. More than 45 % of private guest nights were spent in rural towns with baths in 2018 (MTÜ, 2019).

Hungary's tourism growth is based on a strategy for the period up to 2030. The Hungarian State implemented the tourism-related tasks of the state in 2016 and the Hungarian Tourism Agency (MTÜ), which was also established in 2016, is responsible for enforcing the tourism growth agenda. It is the strategy that enforces a cohesive approach to tourism. Within this, destinations served as the basis for planning overseeing, preparing tourism growth, and responsibility for previously independent, frequently overlapping projects fell into one hand (MTÜ, 2017). The creation of a tourism country image is a significant part of MTÜ's activities. As wine and gastronomy make up an integral part of this, in accordance with terms of the agreement with the National Council of Wine Communities, MTÜ works closely together to create a tourism country image and also a unified wine image, which is an integral part of this (Brazsil, 2017). The objective of this strategy is to increase the contribution to GDP from the current 10 % to 16 %, enhance competitiveness and double the number of guest nights. In addition to attraction development, the strategy focuses on the effects of climate protection and urbanization on tourism, ensuring sustainability, and adapting to global challenges and trends. The strategy has established four products that are considered appropriate for growing unit costs, including health tourism, more specifically, medical tourism, cultural and MICE tourism, as well as



wine and gastro tourism, with an emphasis on top gastronomy (MTÜ, 2017). The objective of the strategy is to create greater coordination between the four 'target products' and incorporate the supply elements as much as possible.

2. Wine and Gastronomy as One of the Flagship Products of Hungarian Tourism

In Hungary, the opportunities for wine and gastrotourism are outstanding, and gastronomy and wine culture have a long history (Gonda, 2016). The country's natural endowments are excellent for viticulture and winemaking. It is complemented by its gastro-culture, which also helps to produce high-quality raw materials due to the favourable natural conditions. The gastronomic range is extremely diverse (Gonda, 2016), with diversity being the real value of Hungarian cuisine (MT, 2013). The same applies to the Hungarian wine sector.

Hungary hosted the Bocuse d'Or European final in 2016, won by the Hungarian Tamás Széll. A Hungarian restaurant won 2 Michelin stars for the first time in 2018, and in 2019 the number of restaurants with stars reached 6. A kind of gastronomic revolution is frequently mentioned in which a prominent role is provided to fresh, local, sometimes seasonal ingredients in addition to quality hospitality (Gonda, 2016). As a result, local-based gastronomic tourism is becoming increasingly important (Tóth, Nagy & Hegedűs, 2017). High-quality restaurants also play a role in choosing a travel destination, indicating a shift to higher-quality services. According to potential travellers consuming local food and drink is an important part of their journey (Sulyok, 2014). However, few restaurants focus on exhibiting local food to date (Tóth, Nagy & Hegedűs, 2017).

The determining elements of gastrotourism in the country can be the so-called Hungaricums (uniquely Hungarian products), enabling to live the "Hungarian experience" (Tóth, Nagy & Hegedűs, 2017). In addition to cultural heritage, the majority of Hungaricums are related to the agriculture and food economy (Tóth, Nagy & Hegedűs, 2017), including, among others, pálinka (traditional fruit brandy), szegedi téliszalámi (Szeged winter salami), paprika from Kalocsa and Szeged (MT, 2013). At the same time, it can be stated that wine and gastronomy (such as goulash and paprika) are part of Hungary's image only in some countries, and especially among tourists who have already visited the country (MT, 2013).

Thus, the values of wine and gastronomy can promote travel when selecting a destination, but in themselves they provide less unique attraction, so it is necessary to behave concertedly with the other elements of the destination (Sulyok, 2014). Fortunately, it is possible to connect gastronomic and wine tourism to other tourism items (MT, 2013; Gonda, 2016), but perhaps the most exciting partnership is formed with festival tourism (Gonda, 2016). In the ranking of the most attractive tourism elements, gastronomy was in the 6th place, festival in the 8th place, hospitality in the 10th place. In the case of gastronomic festivals, wine festivals were most frequently mentioned by the respondents (Tóth, Nagy & Hegedűs, 2017). So, the gastronomic programmes and gastro festivals are the basic elements of the gastronomic offer (Gonda, 2016). Therefore, in order to preserve and present traditions, fairs could be held (Tóth, Nagy & Hegedűs, 2017). The gastronomic thematic routes, which are not only available

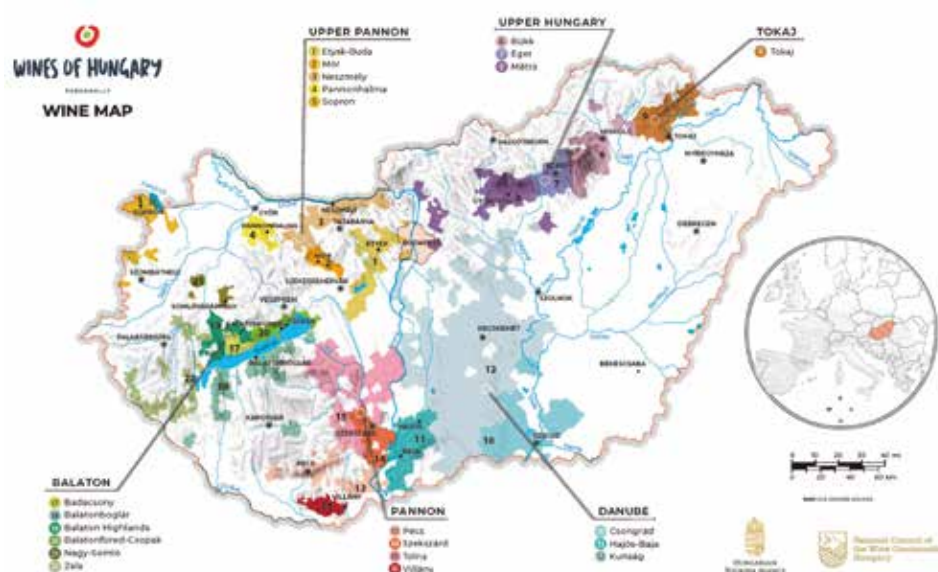


at a specific time, are also worth mentioning. Overall, it can be stated that complex tourism products are a real attraction, of which gastronomy and wine can be an important factor.

3. Hungarian Wine and Wine Tourism

Wine has always been an integral part of tourism offers in Hungary. Hungarian viticulture has its origins dating back to Roman times (Gonda 2016). Hungary presently grows grapes on around 60,000 ha in 22 wine regions (Figure 1). In recent decades, the region under viticulture has declined significantly, by around a third as of the 1990s. Over the centuries, Hungarian wine has gained increasing popularity. It is worth making note of the reputation of Tokaj, which is the best-known wine region abroad. In the early 1800s the best known wine regions were established. The social events around the country promoted wine consumption (Szabó *et al.*, 2014a). Hungarian wines won a lot of prizes at international fairs and competitions at the beginning of the 19th century (Vienna, Rome, Paris, Hamburg). As a result of Count István Széchenyi's efforts the first Hungarian General Agricultural Fair was set up in 1857 with a great wine competition including 2001 samples (Siki, Tóth & Zsiga, 1997).

Figure 1.
Wine regions of Hungary



Source: bor.hu (2020).

After World War II, during the years of socialism, mass production became commonplace, pushing quality into the background and making it impossible for different conditions to prevail in winemaking. Despite all these, there were no infrastructural and other conditions for wine tourism given. Only some professional exhibitions were allowed after World War II by the leading party (Szabó *et al.*, 2014b).



The '90s brought about the changes that provided wine tourism with the opportunity to flourish. The establishment of new wineries differentiated supply, enabled demand to become more polarized and different needs could be manifested. The wine sector has been continuously developing (Smyth, 2015). Interest in wine has grown significantly, wine has become a fashion and a consumer segment that understands wine and requires and appreciates quality, variety and uniqueness has emerged. Based on foreign examples, the first wine route, by the Villány-Siklós Wine Route Association, was founded in 1994. Around 30 Wine Route Associations are currently trying to improve the good reputation of Hungarian viticulture and winemaking.

First, the wine routes were micro-regional areas that aimed to provide livelihoods for local communities, assist local enterprises, encourage quality wine production, and contribute to the enhancement of wine culture through rural tourism growth and wine tourism development. In 2003, the National Association of Hungarian Wine Routes was established by around 20 wine route associations. It is popular nowadays for wineries to open themselves up to tourists, and extend their product and service packages in this area (Gonda 2016).

Wine tourism is therefore an increasingly significant part of the tourism industry (Hofmeister-Tóth & Totth, 2018), the number of guest nights is growing, and more and more people spend two or three nights in wine accommodations (Pallás, 2016). The dedication of the country is expressed by the fact that the capital, Budapest, hosted the most prestigious international wine tourism event in 2018, i.e. the 10th International Wine Tourism Conference (IWINETC, 2018) and the Hungarian Wine Tourism Conference and Exhibition for the first time in 2019 (Mezőgazdasági Múzeum, 2019).

The Hungarian Tourism Agency (MTÜ) has been responsible for the growth of wine tourism marketing since 2019; the Agrimarketing Centre (AMC) is in charge of Community wine marketing while the National Council of Wine Communities (HNT) is liable for wine industry policy. They work closely together while the National Association of Hungarian Wine Routes runs independent tasks and activities. The new marketing concept unveiled in 2019 and as part of it the latest image (logo or slogan; Picture 1) reflects the aforementioned variety, the essential role of Hungarian winemakers (MTÜ, 2020c). On the one hand, the strategy of "Hungarian wine - Personally" illustrates well the bond and desire that binds people with Hungarian winemakers. This suggests, on the other hand, that it is also worth getting to know the wine in person in the cellar, that is, it encourages customers to carry out some tourism activities. Hungarian wine is human-faced, authentic and available according to the MTÜ (2020c) and visiting a local wine region is an experience for international and also for domestic visitors.

4. Tourism Aspects of Hungarian Wine Consumer Research

The GFK (2008) representative consumer survey on Hungarian wine tourism divided wine tourism into two areas based on the nature of the events:

- Wine cellar visits, wine tours, wine tastings, when consumers are acquainted with the offer of a specific wine-growing area or cellar.



- Wine days, wine festivals, during which the products of different wine regions and wineries could be tasted during an organized event.

At the beginning, those interested in wine routes were mainly considered people with higher incomes and more interest in wine than average, and then it became an increasingly common leisure time activity for ordinary consumers too. These wine tours provided the mostly layman wine consumers with an excellent opportunity to get acquainted with the wines of specific wine regions, learn the secrets of viticulture and winemaking and, at the same time, learn and grow their interest in wines. In addition to the expressed benefits, another advantage of the wine routes was social gathering (GFK, 2008). The primary target audience for the wine routes is buyers from high social class, but it was expanded over time with a portion of those from the middle social class.

In addition to the general advantages typical of the activities, wine festivals offered a certain selection of wine supply to the participants, i.e. in this situation it was possible to evaluate the range and create preferences. Since the turn of the millennium, there has been a significant increase in the number of wine festivals and wine events but, at the same time, an interesting duality has become evident. On the one hand, wine has become an important accompanying product for many occasions, mostly linked to gastronomic delights. On the other hand, a wine festival itself has a mostly local effect on drawing visitors. For tourists living farther away from the venue with one or two exceptions, it is not enticing enough, and polls suggest that the influence of such activities on communication is not overwhelming either. An exception is the Budapest Wine Festival, which attracts visitors from over 100 countries on 5 continents (Szabó, 2019). In any case, it can be seen that the trend which started among the high social class eventually occurs among the other members of the society, but its rate of spread is not very quick, and, as yet it has affected a fairly small proportion of the population.

According to the information provided by the survey (GFK, 2008) in terms of location preferences—which is positive for the future—the responses varied quite widely. Interestingly, the most popular wine regions and the locations of the wine tours differed. Traditional wine regions were preferred the most, Tokaj, Eger Badacsony and Villány; Eger and Badacsony were leading in terms of wine tours, but there was interest in practically all wine regions. Even in the representative survey only 20 % of the population were affected to any degree, i.e. they participated or wished to participate in such an event, 80 % rejected the opportunity (GFK, 2008). The fact that only a fairly small group of consumers was open to spending their free time in this way was influenced by many factors. These included lack of information, lack of other resources needed or inadequate quality, but also the relatively limited proportion of those who undertake to travel there only for the sake of wine. The rest of the participants, or those who wish to take part, expect wine tasting and/or the wine festival to be some form of additional activity, which, in itself is less motivating to participate, but rather part of some other cultural, health, etc. related visit. Recognizing the latter nowadays, where there are opportunities for it, e.g. Eger, Villány-Siklós, they are trying to associate wine more and more conceptually with wellness and rural or ecotourism.

The next large-scale research was conducted in 2013 on the possibilities of Hungarian wine tourism. The 1550-person research analysed the population group over the age of 18 whose participants drank wine at least monthly, i.e., committed wine consumers, but the survey was representative by gender, age, and residence type. In terms of the usual place of consumption, 23 % of respondents reported



drinking wine during their journeys at local wineries and 20 % mentioned wine tasting programmes (Bormarketing Műhely, 2013). On the one hand, the findings echo the results of the 2008 GFK survey and, on the other hand, they point out that there has been practically no shift in customer preferences in this field in the five years between the two surveys, except a small improvement in the popularity of wine regions. In other words, the success of the wine regions has increased considerably, with more than 50 % in the top three with Tokaj, Eger and Villány followed by Badacsony, Balaton Uplands and Szekszárd but their mentioning significantly lagged behind the top three. The popularity of a wine region is decisively influenced by the tourist attraction of the destination as well as the number of previous visits.

The National Council of Wine Communities surveyed the size of the Hungarian wine market in 2017, as well as wine consumption and purchasing habits. The sample of 1,500 persons was representative by age, region, gender, and size of locality. (Szolnoki & Totth, 2018.) Research examined the general interest of the population and presumed knowledge of wines. 28 % of the adult population in Hungary thought that they were more knowledgeable in wines than the average, but only 14 % believed that their understanding of wines was higher than the average, i.e., they knew wines better than the average consumers. Within this category, males, or who were in a better financial situation, and more frequent consumers of wine had more perceived awareness and a stronger interest in wines. Age also emerged as a determining factor, and both interest and perceived awareness grew as time advanced. In parallel, just over a third of wine consumers (35 %) felt they were less knowledgeable in wines than the average, and almost two thirds believed their experience was less than average. (Szolnoki & Totth, 2018).

As already stated, there has been a steady rise in the number of wine events in recent times. The research even asked about the awareness of wine events. There are five wine festivals whose success has reached or surpassed 20 % of wine consumers. The best-known wine event is the Budapest Wine Festival in September, which was known by 40 %, which is about twice as many, as the following four best-known wine festivals. These include Etyek Picnic, Szeged Wine Festival with 20-20 %, closely followed by the Budafok Sparkling wine and Wine Festival and Tokaj March Grand Tasting with 19-19 %. The Budapest Wine Festival was visited by 9 % of respondents the other four festivals by 5-5 %. Regarding the popularity of wine regions, the ranking has not changed a lot compared with previous studies, but the proportions have shifted slightly. The most favoured wine region to visit (the entire sample was taken into account in this question including the responses of those who refused wine) towering high was Tokaj, followed by Eger, with more than 50 % popularity, Badacsony, then Villány lagging behind with 26 and 21 %, respectively, with the desire to visit the wine region in question.

Each year since 2016 the Great Wine Test investigates Hungarian wine drinking habits (Hlédik & Harsányi, 2019a). One of the topics of the online survey conducted for the third time in 2018, was wine tourism, in which the HNT explored Hungarian consumers' approach to 'mainly wine-related domestic travels' on a variety of issues (Hlédik & Harsányi, 2019b). Of the 21.788 assessable responses, the responses of the 8.552 persons who received the questionnaire from a non-wine website or newsletter were analysed. Although the study cannot be regarded as representative, useful knowledge was gained about the behaviours of internet users with the help of the broad sample. According to the study, almost two-thirds (62 %) of respondents are used to going on a wine-related domestic trip: 39 % at least once a year, while 21.5 % less frequently. While 38 % of respondents did not take part



in such a trip, almost 30 % would like to go later, leaving only 9 % who refused to go at all. It is a significant improvement from previous polls, which can be due to different causes. On the one hand, in the recent period there may be programmes stimulating domestic tourism (e.g. SZÉP card), as well as marketing and communication activities encouraging it. Furthermore, the development of the wine culture, mentioned earlier, might also have brought some change. As Internet users tend to have a higher social status, the sample composition may also be partly responsible for the difference. It is not surprising that those interested in wines are more likely to participate in wine tours more frequently, and men and those with higher education are over-represented among those who participate in wine tours at least once a year. 70 % of the respondents spend 2-3 days on a domestic wine tour, but 8 % spend 4-5 or more days. 13 % only go for the day. Based on the findings, it is advisable for the destination's wineries, other players and tour operators to compile the programme in such a way as to provide meaningful 2-3 days of entertainment. This fits in with the idea that wine and gastronomy are just part of a journey.

The four most popular travel destinations were the same as the 2017 HNT results (Szolnoki & Totth, 2018), but the order was different. The finding is similar regarding the tastes of wine consumers, which means that the wine regions favoured during the purchase are also the most popular travel destinations, but the order is slightly different. The data support previous findings that in addition to wine, other aspects do play a role in the selection of the travel destination such as the proximity of Lake Balaton (Hlédik & Harsányi, 2019b).

5. Budapest Wine Festival

Budapest Wine Festival –organised by the Hungarian Vini- and Viticulture Np. Ltd.– is the most prestigious wine cultural event in Hungary that has become emblematic throughout its history of nearly three decades, since 1992. Hence, we find its thorough explanation significant in addition to the global implications. Both wine consumers and wine producers generally refer to the Festival as the “Wine Festival”, which characterizes its position in Hungary, but the Budapest Wine Festival is by no means a venue for wine lovers and those interested in Budapest or Hungary. It represents and promotes Hungarian wine culture internationally, thereby fulfilling one of its key objectives.

The following section provides an insight into the data and information collected during continuous primary research work between 2004 and 2019. The sample contains more than 4.300 questionnaires analysed and also secondary data provided by the Hungarian Vini- and Viticulture Np. Ltd. Figure 2 illustrates the fact well that an outdoor festival with the right programmes and preparation, when faced with weather uncertainties, has a consistent potential for growth and attraction. The quantity and composition of the exhibitors is also a confirmation that the right number of visitors has been attracted. The Budapest Wine Festival has an interesting ratio of male and female visitors that used to be the trend with 50-50 % balance until recent times, but there was a turning point in 2010 since when the female visitors have taken the lead by 10 %.

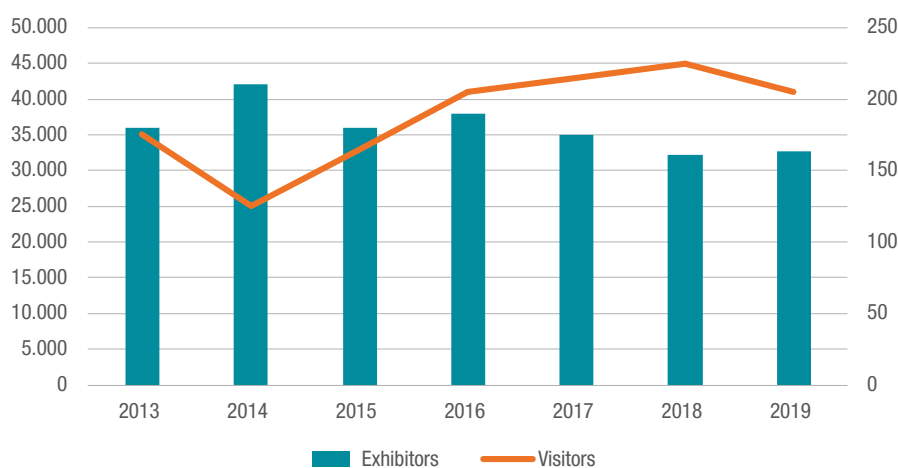
The education background reflects a trend according to which more educated people are interested in the Festival and since 2012 the ratio has been around 80 %. Meanwhile, the ratio of visitors with



secondary school education has been reduced from 40 % to 20 %. This ratio is partly due to foreign visitors while the ratio of those with higher education exceeds 90 %.

In the case of marketing events a strong relationship can be built to make consumers loyal and they are the most powerful tools of communication (Garrison, 2006). The ratio of those visiting the Budapest Wine Festival several times increased by 12 % between 2004 and 2010 (Szabó, 2018).

Figure 2.
Visitors and exhibitors in numbers (2013-2019)



Source: Hungarian Vini- and Viticulture Np. Ltd. (2019).

The events can only be attractive for a long period of time if certain innovation is implemented to maintain the visitors' interest. According to Yu (2008) innovation with services can be new concept, design, and developed consistency. The Budapest Wine Festival and its organisers follow the concept of Levine (2008) and create new service categories, creative solutions in existing categories just like Kotler and Armstrong's (2016) by continuously seeking for product and marketing improvements at the Festival. As the events support to increase the involvement level to welcome the marketing messages related to the event (Pope & Voges, 2000) the festival organisers use focussed marketing communication in social media and wine culture related sources to attract the loyal visitors as well as new wine friends. In the point of view of Fazekas and Harsányi (2011) event marketing combines brand message with a unique and remarkable experience.

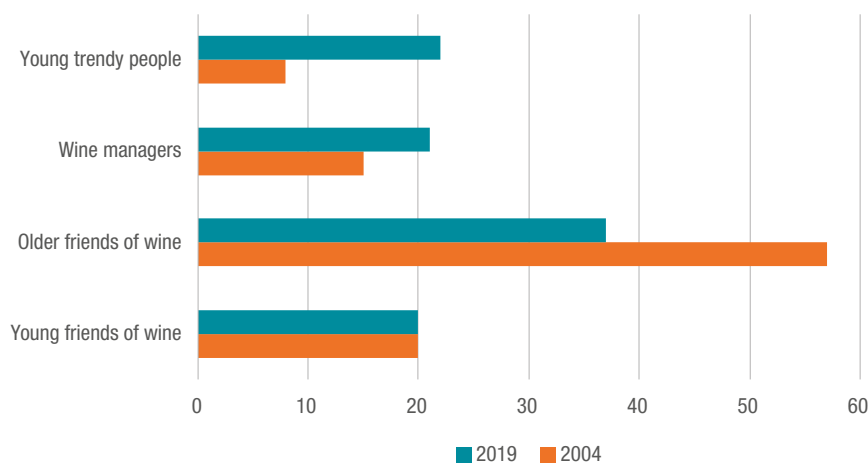
We have to mention that 22 % of the foreign visitors and 28 % of the Hungarians come specifically for the Wine Festival and its programmes, which is also an important indicator of loyalty. In order to be able to serve the potential visitors of the wine festivals, different target groups and their needs must also be considered. So as to get a more detailed view of the Budapest Wine Festival visitors the first cluster analysis was carried out in 2004. Four different consumer groups were defined among the visitors although the sample was quite homogeneous. The four segments included 'Young friends of wine', 'Older friends of wine', 'Wine managers' and 'Trendy Young people' as shown by Figure 3 (Szabó *et al.*, 2011).



In 2019 it was still possible to identify these four segments but the ratio changed to a great extent except 'Young friends of wine' where people represented the same ratio. The most visible positive change can be traced to the 'Trendy Young people' segment that has increased by 14 % since 2004. This change reflects the flexibility of the Festival strategy and the ability to adjust to the current needs of the visitors who are seeking quality and new wines with an attitude towards the price of the event and the wines offered there (Szabó, 2019).

Figure 3.

Visitor segments in 2004 and 2019 at the Budapest Wine Festival



Source: Szabó *et al.* (2011) & Szabó (2019).

6. Conclusions and Challenges of Wine Tourism and the Budapest Wine Festival in Hungary

Hungary's endowments can be said to be favourable for wine tourism. Wine tourism did not start to develop until 1990 for historical reasons, but substantial progress has been made due to several aspects such as improvements in wine quality and consumer preferences, tourism destination developments and regulatory initiatives. Tokaj Aszú is still on the top of the Hungarian wine pyramid, but diversity is distinctive from the point of view of gastronomy and wine culture, and sometimes the identity of the winemakers is of exceptional significance. This is in line with the new wine strategy, which also builds on the role of tourism: Wines of Hungary - Personally.

It can be stated that gastro- and wine tourism only one, part of the country's tourist attractions, but a significant. We must also agree that wines alone are not enough to attract and keep visitors in the field of wine tourism and events. Added services like the aesthetic issues of the natural and man-made environment or the hygiene of the event, are as important as stage performances or cultural programmes. More and more wine makers are adopting production organic concepts and starting to communicate them to the consumers, as well. Sustainability aims are beginning to appear



in the tourist offers of local foods, products and programmes. Events and festivals such as the Budapest Wine Festival, in Hungary, are important tourist attractions. The Event has been improved continuously through innovation and by enhancing its programmes with cultural events and moving to a breathtaking location the Buda Castle. The organisers made use of systematic marketing research to meet the latest consumer expectations, as well. They can also fit perfectly into a complex package of services which should be provided by business and non-profit players in a given destination in order to have a viable programme for 2-3 days and thereby represent a convenient destination in the mind of customers.

Wine tourism and wine festival visitors show a very diverse picture regarding needs and expectations. It is difficult to take into consideration most of their requests or images regarding wine events and their purpose. Satisfaction is of key importance in attracting them to future trips and events. Many factors such as overall satisfaction with the event must be considered, but the selection of wines, services, online and offline communication, as well as involvement in programmes also play an important role.

In order to fulfil all the requirements and dreams of tourists and visitors alike, decision makers must focus on the leading trends in free time activities, entertainment, lifestyle, and marketing innovations.

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Wine Tourism in Portugal

Maria João de Almeida

Portuguese Wine Tourism Association. Writer and wine consultant

Abstract

In just a few years, Portugal has become one of the most important tourist destinations in the world. However, wine tourism development is still extremely limited. Its origin is associated with the modernization of the wine industry that began in the 1980s and 1990s. Few wineries have made the necessary investments to provide these services, the wine tourism cluster is poorly organized and public promotion programs are very recent.

The most highly developed wine tourism districts are the Alentejo and the Douro regions, mainly the former. In the case of Alentejo, the Alentejo Wines Sustainability Plan is particularly important and, in the case of Douro, the fame of Port wines and the value of the landscape of the Portuguese Douro. So far, the large wineries have had the most notable wine tourism success stories, since wine tourism sustainability is part of their integral commitment to sustainability.

The creation of the Portuguese Wine Tourism Association in February 2020 will help promote this activity in all the regions and wineries of the country. Unfortunately, the COVID-19 crisis has dealt a severe blow to Portugal's tourism and all the great illusions placed on it in the short term. However, it is to be hoped that the Portuguese with their virtues of kindness, industriousness and a spirit of self-improvement will know how to overcome and adapt to this ordeal to take advantage of the great potential of Portuguese wine tourism.

1. Introduction

Despite some delays, compared to other countries in the wine world, there are good examples of sustainable and innovative wine tourism in Portugal. The improvements in recent years are plain to see, highlighting producers and other tourism agents specialized in both facilities and products and services. There is obviously still a lot of work to be done, but Portugal can be proud to have a good number of examples of global wine tourism excellence. This chapter analyses how the evolution of wine in Portugal has contributed to the development of wine tourism, what the reality in the Portuguese wine regions is, particularly in the Alentejo and the Douro, and some indisputable examples of excellence in this activity.



Wine tourism is a relatively recent phenomenon. However, there is no legislation that regulates this activity. The European Wine Tourism Charter, born in 2006, as part of the Vintur project, and inserted into the European Network of Wine Cities, has helped to define quality standards and parameters. Undoubtedly, this document has contributed to a global improvement of wine tourism services, also in Portugal. In addition to defining the concept of wine tourism, the Charter includes various rules and suggestions that contribute to the development of a common strategy to guide producers and other tourism entities. The concept it defends is closely related to the environment, the region, and the local population, it shows respect for the regional culture and economy, and points towards a paradigm of sustainability. However, it has flaws, one of which is that it is not compulsory. Furthermore, regarding the quality criteria, there is a lot of subjectivity, since they are not clearly defined each of them is open to interpretation.

For this reason, Portugal –as with other countries– has had to define its own wine tourism model. In recent years, the opportunity to formalize this activity has presented itself with the country experiencing a huge tourist boom and receiving a growing number of tourists, among whom are wine enthusiasts and lovers of different regions and styles of wine. In this sense, an important step was the creation of the Portuguese Wine Tourism Association (APENO) in February 2020. The strategy of the new association is to provide a voice to wine tourism in Portugal; It aims to defend it as a relevant sector in the Portuguese economy, promote its internationalization and make it a world reference. In this context, it will support various measures in the fields of employment, investment and taxation, as well as training. Finally, APENO also intends to develop a broad plan of activities, including several events designed to raise visibility and enable the sector to be more dynamic.

2. The Evolution of Wine and Wine Tourism

Wine has evolved qualitatively over time, thanks to the advancement and development of production knowledge and techniques. Consumers have reacted to this improvement by seeking new knowledge and activities related to wine. In the case of Portugal, the sector has experienced many years of decline, with the production of inferior wines, mostly sold in bulk in taverns and in places that gave it a bad reputation. Apart from Port wine, with a fame that came from afar, or the few good wines from the Dão and Bairrada regions, which were already sold bottled, any other production was an embarrassment. The focus, what really mattered, was the quantity and not the quality. However, the entry of Portugal into the European Community in 1986 and the appearance of new production and quality rules completely changed the landscape of Portuguese wine. The 90s made these changes more intense and, little by little, wine tourism began to echo them.



The world of wine took a radical turn. Production began to focus on quality. Wine began to be bottled and sold everywhere: in wineries, in super and hypermarkets, and in the Horeca channel (Hotels, restaurants & cafeterias...). Talking and knowing about wine became part of the lifestyle, granting status. New producers and new wine brands emerged, the wineries began to modernise and the winemakers, specialized in other countries, returned to Portugal with new knowledge.

One of the results of this process is that, as with chefs in gastronomy, winemakers have become “stars”. Their presence in important national and international fairs, as well as that of producers, is required to have a more direct contact with the consumer. The wine / food connection is becoming more and more important, especially through the tasting menus, where various dishes harmonize with good wines. Wine is beginning to appear more and more strongly in the national and international media. There are also TV shows, movies and documentaries related to the topic. Numerous wine competitions are held, and Portuguese producers win many medals and awards. Wine courses are increasingly in demand, and consumers are becoming more demanding too. All this means that users show greater interest in getting to know the wineries and the producers start to invest in wine tourism.

3. Alentejo and Douro, Reference Regions in Portuguese Wine Tourism

Portugal has a great abundance and variety of wines, as well as producing areas, with great potential for wine tourism (Figure 1). The result of this is the fact that several regions have seen the emergence of new wine tourism infrastructures: wineries, hotels, restaurants, shops, tourist entertainment service companies, among others, that serve groups of people of different ages, of various nationalities and with different objectives. However, there are two regions that stand out: Alentejo, where there is a greater offer; and the Douro, which, in addition to the offer, is where Port is produced, one of the most famous wines in the world.

In these regions, sustainability is also more visible at all levels. Good sustainability practices in the vineyard, the winery and wine tourism are increasingly present. They are reflected in the environmental impacts of production and in the strategies and activities of other companies dedicated to wine tourism.



Figure 1.
Map of the wine regions of Portugal



Source: Viniportugal.



3.1. Characterization of the Alentejo

Located in the south of Portugal, the Alentejo is a region with a warm climate. The plain reaching as far as the eye can see, covered with vines, cereals, olive trees or dotted with cork oaks here and there, is one of the most beautiful landscapes in the Portuguese countryside. There is also the mountain landscape, with another charm. During the first decades of the 20th century, the Government made the Alentejo the granary of Portugal, given the importance of the cultivation of rainfed cereals. Wine was of secondary importance and was primarily intended for local consumption. The vinification was carried out according to the traditional processes inherited from the Romans and the fermentation was carried out in large clay and pottery amphoras.

Over time, the situation has changed, as the enormous potential of the Alentejo as a wine producer has become a reality. Nowadays it is one of the favourite wine regions for Portuguese consumers and has already achieved a good international reputation. The Renaissance of Alentejo viticulture began in the 1950s, through cooperative wineries that managed, in some way, to structure the productive sector. However, it was in the 80s when the region took a great leap, developing through new associations of winegrowers, new producers, equipment and technical knowledge brought from abroad.

The Alentejo Demarcated Region coincides with the geographical area of the region, which extends over 26,158 km². The total vineyard area is around 23,500 hectares (approximately 10 % of the total national vineyard area); It has the greatest diversity of soils in Portugal and the most hours of sunshine and the very high temperatures in summer allow the grapes to ripen perfectly. Due to the size of the territory, it has three wine routes: the São Mamede Route (which partly coincides with the area covered by the Serra de S. Mamede Natural Park and includes some of the most beautiful and typical Alentejo towns and cities), the Historic Route (centred around Évora, a UNESCO World Heritage Site, and its surroundings) and the Guadiana Route (marked by the presence of the river of the same name and the extensive plains). Alentejo wines, for the most part, are fruity and, at the same time, full-bodied, and are to the taste of Portuguese consumers. As for wine tourism, Alentejo is revealed as the most complete Portuguese region, with a very varied offer of places such as wineries (with or without accommodation and meals), but also complementary tourist companies, restaurants and independent hotels scattered throughout the region.

Its landscape both in the countryside and along the coast is enchanting. Not surprisingly, it has won several awards and has been featured in several international publications: It was included in the *21 World Must-Visit Destinations* of the *National Geographic* travel magazine (2013); it was considered the "Best wine region in the world to visit" by USA Today (2014); it has "The best beaches in Europe" according to The Guardian (2014); belongs to the New York Times list of "Best destinations to visit" (2015); and it is among the '10 Best Winery Destinations to Travel in the World', in the list published by Wine Enthusiast, among other acknowledgements.



When it comes to the issue of sustainability in the world of wine, Alentejo has been a pioneer in Portugal. In 2019, the Alentejo Regional Wine Commission (CVRA), an organization that controls, protects and certifies Alentejo wines, in collaboration with the University of Évora, decided to develop the Alentejo Wine Sustainability Program (PSVA). This Program, pioneer in Portugal, is free and voluntary. Its main objective is to provide its members with a tool that allows them to evaluate the way in which they carry out their activities and recommend best practices to increase the competitiveness and sustainability of Alentejo wines. The challenge is to produce quality grapes and wines in an economically viable way, protecting the environment, improving relations with employees and neighbours alike.

CVRA saw its Sustainability Program distinguished with the title of European Ambassador for Rural Innovation (2019), by LIAISON, a project created by the European Commission to promote the best European projects in terms of innovation in agriculture and forestry in rural areas; in addition to being recognized with various national and international press awards. The results of sustainable practices in the winery, in the vineyards and consequently in wine tourism are increasingly inspiring producers and tourism companies to invest in and improve their products and services.

3.2. Success Stories in Alentejo: Esporão and Malhadinha Nova

If there is a wine project in Portugal that has been changing its strategy over the years to incorporate the challenge of sustainability, it is Herdade do Esporão. Founded in 1973 by the entrepreneurs José Roquette and Joaquim Bandeira, Herdade do Esporão is one of the most important wine companies in Portugal. In addition to the Alentejo, it also has properties in the Douro and in the Vinho Verde region and has carried out its activity within the rules of sustainability.

Adapting to a wide range of innovative sustainable practices at Herdade do Esporão has resulted in several national and international recognitions, including the prestigious *Sustainability of the year award* by the magazine *The Drinks Business Green Awards* (2013) and the *European Business Awards for the Environment* in the Products and Services category (2014). In 2018, the businessman José Roquette was recognized with *The Green Lifetime Achievement* award by The Drinks Business Green Awards and João Roquette, his son, was considered the *Personality of the Year 2018* by the magazine *Revista de Vinhos* at their *The Best of the Year 2018* awards .

Good environmental practices have always been part of the culture of Herdade do Esporão. However, in the last decade this strategy has intensified with the transition of its entire agricultural area to organic production. 2019 marked the history of the winery with the first harvest of the entire estate (488 hectares) certified in organic production.



At Herdade do Esporão, the most relevant practices implemented in the vineyard promote biodiversity, good soil management and efficient use of water. The highlight is: the non-use of synthetic chemicals; the introduction and promotion of predatory species (bats that feed on insects harmful to the vine); the use of chickens (for the control of spontaneous vegetation and soil pests, and as pollinators and dispersers of cover crops); and the planting of protective hedges (essential to host the predators of crop pests). To maintain the soil, the following practices were introduced in the vineyards: grazing (the flock of sheep controls spontaneous vegetation avoiding the use of mechanical and chemical means, and also helps prevent forest fires); permanent crop cover (which encourages an increase in soil organic matter content); irrigation and precision agriculture (which allow a more efficient use of production factors). In addition, good practices continue with: the creation of protection hedges (which reduces the impact of the wind and increases the beneficial fauna, which preys on species harmful to the vine); and the use of by-products generated by agricultural activity (for example, the stems are used as fertilizer for crops). It is also worth mentioning the planting of an experimental vineyard with 189 varieties, which, in a context of climate change and organic farming, allows the evaluation of the resistance of different varieties to pests, diseases and stress factors (water, thermal) in order to define the varieties to be used in the new plantations.

Sustainability also applies in the winery. The efficient management of water and energy is a reality, and employees are regularly made aware of its correct use. Whenever new equipment is purchased, energy efficiency is one of the selection parameters. The fermentation tanks have reinforced insulation to guarantee the efficiency of the cooling systems during the harvest; the bagasse is used to produce compost and even the suppliers are made aware of the need to reduce the containers to pack and transport the products to the bare minimum.

All these sustainable practices in agriculture and in the winery are reflected in Herdade do Esporão's wine tourism products and services. Local products are promoted through wine-tasting sessions and in the restaurant; Most of the workers are from the region, so they have a huge commitment to the local community; the activities promoted by the estate are related to local history and culture, with an emphasis on and access to educational content; and respect for nature is transmitted to the visitor through good agricultural practices.

Another example of good sustainable practices both in the Alentejo and at the national level is Herdade da Malhadinha Nova, in Albernôa, in the lower Alentejo. It is a very complete establishment, equipped with a rural hotel and renovated houses to spend the night in, SPA, restaurant, wine bar and stables (Figure 2). Popular activities include horse-riding, quad biking, hiking and canoeing, wine, gastronomy and local arts workshops, as well as grape harvest programs. Everything on this property is thought out with the sustainability of the vineyard, the winery and the wine tourism in mind.



Figure 2.
Herdade de Malhadinha Nova



Source: *Herdade da Malhadinha Nova*.

Malhadinha Nova came into being in 1998, the result of the Soares family's determination to produce high-quality wines on their abandoned lands, aware of the challenge of maintaining the natural balance of a unique property. Never before had it been subjected to intensive soil exploitation; neither to plantations of any monoculture nor had it been the object of real estate speculation. Thus, the preservation of a perfect ecosystem made up of holm oaks, traditional olive groves, wheat, oat and barley fields and a natural meadow, as well as the restoration of the existing buildings on the property, became a primary objective. Before planting the first vines, the family acquired various native animals: pure and certified Alentejo cows, Alentejo PDO black pig, Alentejo pure Merino sheep and purebred Lusitanian horses. Thereafter the full potential of the Malhadinha lands was harnessed, using the resources in a sustainable way at various levels.

On an economic level, profitability is guaranteed in all areas of the estate. The enormous investment in the quality and exclusivity of the product, in the importance of the image and in the excellence of the service, transported the *Malhadinha* brand to recognition and consolidation on the national and international markets, which ensures the sale of what is produced.

At the social level, sustainability is also guaranteed. When the company was created, it started with two workers from the region. Today, more than 70 people work on the property, 80 % of whom are from the region, thus respecting local employment and valuing its potential. The same goes for art and traditions. For the recovery and construction of various buildings, various traditional materials were used such as terracotta, or tiles made by local artisans, regional wood and local carpentry. There is great concern in Malhadinha for sharing and preserving local knowledge, know-how and traditions,



which translates into the participation of the community, artisans, musicians and other artists in all the wine tourism experiences promoted by Herdade da Malhadinha Nova in its tourist activity. In addition, the production of these artists is exhibited in the different rooms and can be bought by wine tourists.

At an environmental level, in 2017, the entire property (455 hectares) was converted to organic production. The water treatment systems are carried out throughout the farm using biological techniques using plants, and the efficient use of water is monitored by flow meters installed at all points of consumption, which avoids unnecessary expenses. In addition, this monitoring and control is also carried out through good agricultural practices: the natural fertilization of the soil with the use of manure and auxiliary crops capable of providing nitrogen (beans, lupine, clover...) or natural weed control, by sheep grazing at certain times.

Other sustainable practices can be highlighted such as: the recent acquisition of ten 100 % electric vehicles, for employees and guests alike to move around on the estate; the use of solar energy in all accommodation units; the use of firewood boilers from the pruning of holm oaks on the property; and the acquisition of state-of-the-art equipment with maximum energy efficiency.

Finally, it is worth highlighting the participation from the very beginning of Herdade da Malhadinha nova in the Alentejo Wines Sustainability Plan promoted by CVRA, which reflects and demonstrates its commitment to sustainability.

3.3. Characterization of the Douro

The Douro is surprising, it has a spectacular landscape, marked and influenced by the river of the same name, which flows through the territory from Barca d'Alva to Oporto. Port wine was born there, an emblematic product recognized worldwide for its quality. Its history is made up of centuries of human toil, fatigue, and sweat. The men cleared the land, removed the shale and slate, molded the walls and terraces to plant the vines, erecting a colossal work that, in 1756, became the first Demarcated Region of the World at the hands of the indisputable figure of the Marquis de Pombal, minister of King D. José. The Douro was recognized by UNESCO as a World Heritage Site in 2001.

The Douro territory occupies about 250,000 hectares and is naturally divided into three sub-regions with their own characteristics: Baixo Corgo (from the westernmost area to the southern line, which crosses the mouth of the Corgo River); Cima Corgo (from the upper limit of the Baixo Corgo to Cachão da Valeira) and, finally, the Douro Superior (which extends from there to Barca d'Alva).

Most of the plantations are on terraces built on the slopes of the valleys along the Douro River and its tributaries. The vines are located mainly on slate, but also granite soils. These are soils that are difficult to work but are very beneficial for the longevity of the vineyards, allowing the production of high-quality wines. The varieties of grape grown have a centuries-old history in the region, some of which date back to the Middle Ages, cultivated by the Cistercian Order.

In terms of wine tourism, the Douro is one of the most developed regions in Portugal, although there is still great potential to be explored. For example, there is a lack of infrastructure to facilitate access



to wine companies without having to travel many kilometres (the existence of more bridges could be of great help), there should be more transport alternatives and tourism companies could be created to complement the existing offer. In return, producers are investing a lot in this area.

3.4. Success Stories in The Douro: Sogrape and Symington

One of the most prominent companies is Sogrape, the largest wine producer in Portugal which, in addition to the Douro, also produces in other regions. In Portugal, all its vineyards are certified in integrated production. It is a system that is derived from the international standards of the International Organization for Biological and Integrated Control, which in this country is promoted and regulated by the Portuguese State –through the Ministry of Agriculture and Rural Development, DGADR– and is based on a set of good agricultural practices and rational management of natural resources, thus contributing to sustainable agriculture.

Sogrape Vinhos came into being thanks to the will and daring of a group of friends who, in the difficult economic and political environment of 1942, in the midst of World War II, decided to commit heavily to the talent of a visionary man to create and develop a different and innovative wine company, capable of promoting and positioning Portuguese wines on international markets. This man, Fernando van Zeller Guedes, was the creator of the first Portuguese wine brand in the world –Mateus Rosé–, whose great commercial success, in more than 120 countries, served as a decisive catalyst for growth and the confirmation of the leading position that the company attained.

Managed today by the third generation of the founder's family, Sogrape Vinhos maintains the strategy of making quality Portuguese wines known to the world, with a strong focus on brands capable of meeting the needs of different market segments. Over the years, Sogrape has managed to grow, sustainably, with a permanent investment in the valorisation of its heritage and human capital. It currently has 770 hectares of vineyards in the main Portuguese wine regions and 8 wineries in the Douro, Vinhos Verdes, Dão, Bairrada and Alentejo. In addition, it also produces wines in Spain, Chile, Argentina and New Zealand.

Sogrape bases its wine-growing practices on the three fundamental pillars of sustainability: the environment, the economy and the society. The fact that they produce in different locations allows Sogrape to have a broader and more global perspective, adapting in any of the places where it operates to the geographical, social, cultural and economic context. The practices implemented in the Douro are oriented towards sustainability. In the vineyard, they vary according to the region, but their emphasis is on water conservation, its rational use to control the water stress of the plant; energy efficiency; soil protection; the promotion of biodiversity; the sustainable use of phytosanitary products; continuous training of employees and preservation of grapevine genetic resource diversity. In the winery, water conservation and energy efficiency practices are implemented. Circular economy practices are also used; efficient lighting systems (sunlight, led lamps, among others); more energy efficient equipment; production of renewable energy (solar panels); effective thermal insulation; continuous training of employees; existence of effluent and water phyto-purification systems; and reduction and even elimination of certain wastes, such as diatomaceous earth.



In addition to Integrated Production applied in its vineyards in Portugal, Sogrape is a company certified by the ISO14001 –Environmental Management– standard and complies with the applicable environmental, legal and regulatory requirements. The remainder of the productive assets of the Sogrape group business have also been environmentally certified.

In Portugal, Sogrape is carrying out some organic production experiments, as is the case of 2.6 hectares in Quinta do Seixo (Figure 3), and this is something it will continue to do. There are also companies of the Sogrape group, in the different countries in which it operates, that already have certified organic wines on the market –as is the case of Bodegas LAN (Spain)– or only certified vines –such as Framingham (NZ)–. In Chile, Viña Los Boldos is already experimenting with organic production practices.

Figure 3.
Quinta do Seixo



Source: Sogrape.

All these practices are reflected in the wine tourism services that Sogrape offers. In its establishments (mostly between the Douro and Porto) there is great involvement of local communities, the promotion of regional products is valued and they invest in the constant communication of their practices in favour of the environment, which contributes to their visibility and tourist demand. Its wineries, cellars and visitor centers are very well structured, with a clear promotion of the culture and history of the region.

Another of the main producers of Port wines is Symington, based in Porto. Most of its vineyards are in the Douro Valley, in the north of Portugal, on a large estate divided into 26 properties that cover 2,462 hectares, of which 1,114 hectares are vineyards. It is an independent family business, created by the first Symington who arrived in Portugal and began working as a port producer in the



city of Porto in 1882. Today, ten members of the fourth and fifth generation work in their brands of recognized quality such as Graham's, Cockburn's, Dow's and Warre's and a portfolio of other products including DOC wines such as Quinta do Vesúvio, Quinta do Ataíde, Altano and Prats & Symington (producers of Chryseia and Post Scriptum).

The quality of their wines, combined with high-quality wine tourism services, has earned them several awards, including the Great Wine Capitals, an association that brings together nine of the most important wine regions in the world, which chose the centre of Quinta do Bomfim as global winner in the category of 'Services to Wine Tourism', at the Best of Wine Tourism awards in 2017. In 2019, Symington began a new business venture in Alto Alentejo, in the Portalegre subregion, with the launch of the first Quinta da Fonte Souto wines, a property acquired to produce wines with a designation of origin.

All of the Symington family vineyards are sustainably cultivated under minimal intervention certification and 130 hectares organically cultivated (the largest area of organic vineyards in northern Portugal). The company has invested significantly in viticulture to adapt to climate change and is working on an ambitious sustainability plan under the slogan of Mission 2025.

In 2019, Symington was the first Portuguese wine producer to become a "B Corporation", certified by demanding standards of social and environmental responsibility, and which received the 'Ethical Company of the Year' award, within the framework of the awards Drinks Business 2019 Green Awards. In 2020 it has joined the International Wineries for Climate Action, an association of wine companies that lead the decarbonization of the wine sector, in accordance with established CO2 reduction guidelines, promoted by UN agreements. One of its goals for 2025 is to reduce the consumption of water, electricity and carbon (CO2) emissions per litre of bottled wine. For example, the company aims to reuse water more than once, that is, to install a system that allows the treatment and recovery of water for more than one use in the process, before being discarded as effluent. It also aims to establish maximum amounts of water by type of tasks, placing flow limiters and reusing the treated water from the Wastewater Treatment Plants (WWTP) for the irrigation of green areas.

Symington also acts on the main activities that contribute to the carbon footprint such as the production of bottles, transportation, application of fertilizers and the dispatch of the finished product, through the reinforcement of the photovoltaic installation, the creation of a platform of carpooling and the implementation of a transition plan towards an electric fleet. By 2025, all new vehicles purchased will be electric or hybrid.

The company is eliminating plastic, using recyclable packaging. It also wants to minimize the impact of buildings and wineries, maximizing, for example, the movement of wine by gravity or opting for new insulation solutions in building renovations. Regarding climate change, it has adopted the three possible approaches: adaptation, mitigation—reducing emissions—and giving a voice and using the company as a platform to draw attention to the problem.

In recent years, Symington has also supported various social initiatives: it has donated 13 ambulances to the Douro volunteer fire brigades and helps Bagos d'Ouro, an institution dedicated to the disadvantaged children of the Douro. The company employs about 400 workers, a number that increases at harvest time, when more labour is required. Its commitment to sustainability is reflected and transmitted through its wine tourism services.



4. Profitability and the Future of Wine Tourism

As the press has recognized in recent years, it has become a must for international tourism. It has sun, good food and good wine, and also nice, friendly and hospitable people, who welcome foreigners with open arms and make visitors feel at home. However, with regard to wine tourism, there are still many producers and tourism companies that continue to consider investment in this activity as secondary, without realizing the advantages it generates for their brands and services, and for their profitability.

Used with strategy and professionalism, wine tourism is the ideal tool to gain notoriety, allowing direct and decisive contact with the end consumer. Such contact not only enables the creation an alternative source of income, but also contributes to increasing visibility and, above all, brand loyalty.

Wine tourism is also a generous engine of the local economy, adding value to the assets of the region, to the historical and cultural heritage, and creating jobs that allow the population to remain in their land. And with this, it helps protect and maintain the production of regional goods. However, nothing is possible without investment and personal commitment. In Portugal, more vision is needed in this area and more entrepreneurship. Without investment there is no return; without a strategy an objective is not reached effectively; and without availability and delivery no doors are opened.

It is also necessary to invest in assertive communication, which tells a story and describes the wine tourism experiences well, attaching attractive and professional photographs. It is necessary to associate producers and create alliances and synergies that enhance the development of the regions; in order to build a coherent message among all tour operators and tourism agents. For this to happen, an additional effort to the work that is already being done today is required.

Since 2014, the year when Turismo de Portugal carried out the last study on the “Characterization of Supply and Demand of Portuguese Wine Tourism”, there have been no recent figures that reflect the current reality. The recently created Portuguese Wine Tourism Association (APENO) intends to fill this gap in the coming years, as it plans to carry out studies to understand the reality of the sector. After analysing the first figures for the wine and tourism sectors in Portugal, APENO estimates that the wine tourism sector may represent 60,000 economic agents; 410 million euros of annual turnover and 100,000 jobs. But to confirm this data, much work remains to be done.

5. Conclusions

In 2019, Portugal was recognized for the third time in a row as the best tourist destination in the world by the World Travel Awards, considered the ‘Oscars’ of world tourism. Portugal also occupies a prominent place in the international panorama of wines with prestige and quality. Therefore, it is not surprising that this country is committed to wine tourism, in order to become a world reference wine tourism destination in the coming years, with a quality offer throughout the national territory and a hallmark of wine destinations, which must be preserved, highlighted and valued. The creation of the Portuguese Wine Tourism Association in 2020 is an indicator of the positive response of wineries to this challenge.



Although the best examples of wine tourism and sustainability are in the Alentejo and the Douro, there are interesting projects in other regions. In Dão, for example, Quinta de Lemos and Caminhos Cruzados are noteworthy. In the Vinho Verde region, Quinta da Lixa is also worth a mention, owner of one of the best oenological hotels in the country, or Monverde. Projects such as Quinta do Encontro also stand out in Bairrada; in Beira Interior the Casas do Côro project; and, in Lisbon, Adega Mãe. All are good examples that demonstrate the wine tourism capacity of Portugal, but it is necessary for others to follow their example.

Suddenly, the COVID-19 pandemic dealt a serious blow to the development of these projects and taking advantage of all the opportunities. However, it is to be hoped that, after all this has passed, Portugal will be able to achieve its international tourist position and improve its offer. Now the most important thing is to restore the economy, since tourism (wine tourism included) is one of the most affected sectors. However, with the right measures it is possible to slowly and confidently recover the good times and the results obtained.

Until there is a vaccine, safety rules must be followed for people return without fear. It is up to each producer and each company that is dedicated to the enotourism activity to work for this to happen. The important thing is not to stop and to reinvent the business, to continually arouse the interest of wine lovers.

At a time when Portugal was fashionable, as it had never been before, and its enormous potential to continue growing was recognized, it is difficult to see how in a few weeks all the effort made has suddenly stopped working. But we must not forget the ability of the Portuguese to reinvent themselves, masters of overcoming difficulties. We are still a friendly people, who like to receive well. We are creative, generous and hard-working. I have no doubt that we will rise again.



Part IV

Wine Tourism in the Main Countries of the “New World”



Wine Tourism in Argentina

Gabriel Fidel

Universidad Nacional de Cuyo (Argentina)

Abstract

Argentine viticulture has a history that goes back five centuries to ancient European traditions, which arrived with the conquerors and developed into their own identity. In the last two decades, wine tourism has grown more than the average for tourism in Argentina and has been able to express the importance of national winegrowing in terms of production volume and quality. This growth was accompanied by a joint planning process between the public and private sectors, and between tourism and winegrowing entrepreneurs.

Wine tourism is the conjunction of two wonderful activities that are part of the most important experiences of contemporary man, wine and tourism. Along with the phenomenon of globalization, wine tourism grew hand in hand with the increase in world tourism flows and the greater consumption of quality wine, and the curiosity to know more about the origin and the production process. Argentine wine tourism is a lively, innovative, rich and dynamic proposal that increasingly reflects the experience and identity of our wine regions as its main attraction.

1. Introduction

Wine tourism, as a manifestation of thematic tourism, satisfies both demand and supply. The tourists receive knowledge and enjoy the wine-growing landscapes and good drinking, while the winery and the producers promote their brands and products, make direct sales and build customer loyalty. Wine tourism makes it possible to manage the wealth of wine in our regions and is related to identity, culture and landscape. It is the meeting point between wine, culture and tourism as a way to value wine regions and turn them into tourist destinations.

The origins of the wine industry in Argentina date back to 1557, when Friar Juan Cedrón planted the first vines, brought from La Serena, Chile, in Santiago del Estero, in northern Argentina. The first wine productions were aimed at serving the needs of the Catholic Church. Some of the first vineyards were those that were planted in the province of Córdoba by the Jesuits, in the 'Estancias of Alta Gracia and Jesús María' in 1618, which became, together with those of Tarija in Bolivia, very important in the Viceroyalty of the Río de la Plata and were part of the Camino Real that reached Cuzco. The wine called 'lagrimilla dorada' (golden teardrop) was produced and, thanks to this political and commercial transit, the wines of the Jesuits transcended beyond the convents.



In Cuyo, the first vines arrived in Mendoza and San Juan after the founding of both cities in 1561 and 1562 courtesy of the 'conquistador' Juan Jufré, where they found optimal conditions for growing grapes. For this reason, the characterization of Argentina as a country of the «New World» wine industry is relative, since five centuries of wine-making history have already passed in this part of the world, as a true continuity of ancient European traditions.

In the middle of the 19th century, great changes took place in Argentine viticulture thanks to the advent of industrial viticulture. Increased demand in the domestic market in the post-colonial period, the arrival of large numbers of European immigrants, and the introduction of the railroad favoured the transformation.

In the 1990s, Argentina underwent its final phase of transformation to become what it is today. The fifth producer worldwide at 14.5 million hectolitres; ninth consumer at 8.4 million hectolitres; tenth exporter at 2.8 million hectolitres and the seventh largest surface area, with 219,000 ha (INV, 2019). Argentinian viticulture generates more than 106,000 direct and 280,000 indirect jobs and is one of the top 10 exporters. It has 17,011 winegrowers, 10,974 of whom live in Mendoza (INV, 2019).

2. Strategic Planning of Wine Tourism in Argentina

In Argentina, as has occurred in most of the world's wine-growing areas, wine tourism has accompanied the great transformation that has occurred in the wine industry on a global scale and has enhanced the management of the wine-growing wealth of the producing regions. It became a pole of attraction for both the qualified wine tourist and for the amateur who wants to learn about wines, the production secrets, the history of the wineries, draw on the identity of the location and tour the vineyards.

The vision of the development of Argentine wine tourism has been based on the strength of identity, culture and landscape, taking advantage of the synergy between the winemaking tradition, tourism and culture as a way to add value to producing regions to turn them into tourist destinations.

It was possible to consolidate wine tourism as a public policy, in which the State and the private sector learned to work together with the objective that Argentina should be identified as a wine tourism destination. The strategy followed the paradigm shift that was observed in the whole world, with the growth of thematic tourism and of tourists increasingly beginning to seek new experiences and to interact with the reality of the places they visited. This goal was going to be possible in a country with a great winemaking tradition, with the presence of wine regions with all the necessary resources to position itself among the main wine tourism destinations in the world. In addition, above all, for the quality of our viticulture and the great climatic and landscape diversity that it offers visitors, who are given the opportunity to enjoy different experiences in each of the areas.

The success of wine tourism in Argentina is a good example of collective achievement, the result of the commitment and joint effort of all public and private institutions, of the tourism and winegrowing sectors, which provided their joint technical and economic support, establishing a fundamental precedent in the country.



Thanks to this vision, and the actions that were carried out, Argentina has experienced unprecedented growth in wine tourism activity in recent years. As we will see later, the arrival of foreign visitors increased, and domestic tourism grew. Moreover, the wines of Argentina gained ground on world markets, positioning themselves due to the quality and the prestige of Malbec grapes and the diversity of its wines.

The vision of transforming wine into an emblematic product for tourism emerged in the late 1990s via the brand 'Los Caminos del Vino'. The first steps were taken with some wineries and tour operators that were becoming interested in the subject and with the city of Mendoza, and that decided on wine tourism as the main axis of its tourism plan. In 2002, Bodegas de Argentina created the National Wine Tourism Commission, made up of wineries that provide tourist services in the different wine-growing areas of the country, with the aim of promoting an entrepreneurial attitude of micro- and small businesses, not only in winegrowing but also tourism, gastronomy and all involved in the activity.

The Argentinian Wine Tourism Consolidation Plan was implemented between 2007 and 2011, based on an agreement between the Ministry of Tourism of the Nation, Bodegas de Argentina and the Inter-American Development Bank. The Federal Council of Investments and the provincial governments of Mendoza, San Juan, Salta, Catamarca, La Rioja, Río Negro and Neuquén also came forward. This was an especially important fact, as it was a model of institutional cooperation that constituted an unprecedented event in Argentina. The plan achieved the participation of a broad selection of both public and private wine and tourism stakeholders in which many measures were initiated in the complex task of coordinating the actions of so many diverse sectors and territories.

Tourism and viticulture were combined in an undertaking whose ultimate goal was, and is, to benefit the entire community, promote economic development and generate employment. It was also proposed to guarantee the quality standards of the services provided and to update the professional skills of the human resources involved in the design, provision and marketing of products related to wine tourism. The project was divided into four stages: the first, based on a study of international supply and demand for the model of wine tourism; the second, for the development of wine tourism products and associated routes; the third, the implementation of a quality program; and the fourth, communication and marketing.

The combination of viticulture and tourism, expressed in wine tourism, contributed to the improvement of the prestigious image of regional brands, and helped to redefine the positioning of wine tourism destinations, expanding the tourist offer, with a strong cultural and heritage identity. There was a positive socioeconomic impact on the direct and indirect beneficiaries, a large number of small- and medium-sized enterprises in the tourism and wine sector such as wineries, restaurants, hotels, tour operators, wine bars, shops and artisans, among others. The results were positive. In 2011, 1,205,612 tourists travelled the wine roads of Argentina. The growth between 2004 and 2011 was 185 %, with an average annual increase of 17.5 %. In 2004, 62 wineries were open in Argentina and in 2011 there were 185. In 2004, the incidence of wine tourism in national tourism was 1.49 % and in 2011 it was 2.72 % (Bodegas de Argentina, 2011).

The conceptual framework that led the action in Argentina focused on the fact that wine tourism is the development of the territory as heritage and an expression of identity. The Wine Roads became places

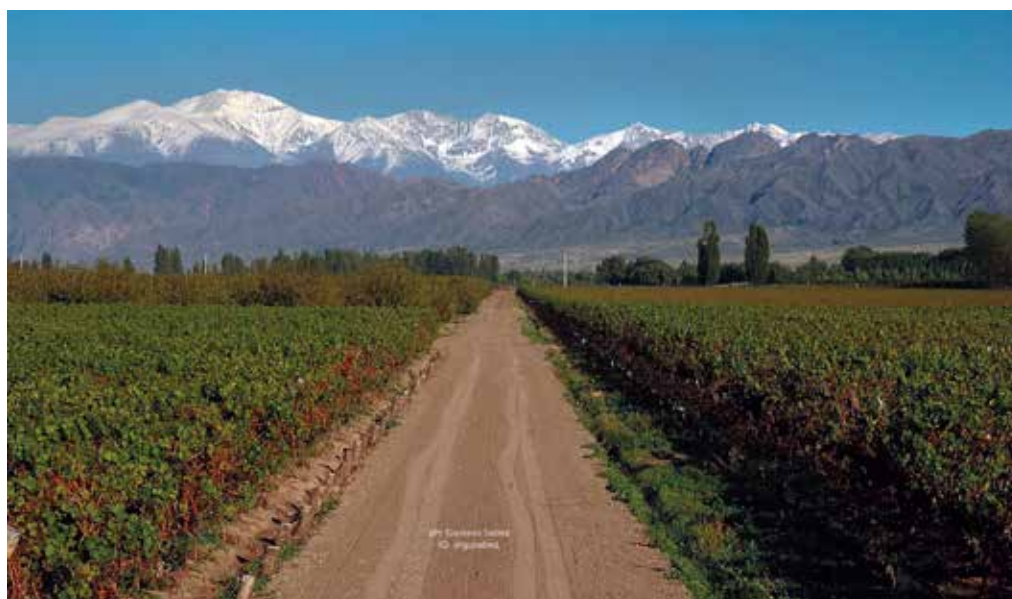


where these events took place, and their relationship systems are evidenced through their openness to tourism. The term 'Los Caminos del Vino' contains in its essence the concept of heritage as an expression of identity and that cannot be considered to be crystallized, frozen and / or untouchable, but as a dynamic reference, as an added value to be used and with multiple options for the different aspects that they are presenting. As members of a system, each road represents a set of tangible and intangible natural and cultural assets, individualised in different landscapes, corresponding to a space or community that, due to the characteristics of its components, its uses and customs, its uniqueness, due to the processes and consequences of its historical and current development, have an exceptional value to protect and conserve for its enjoyment, its present and future use, and to endorse the identity of the companies linked by the different wine-growing areas recognized and popularized by that same society (Barroso, 2016).

Within our concept of territory, road or tourist route as part of a system, the landscape cannot be left out as it is a fundamental resource for the generation of tourist products and that, together with the winery, is part of the very essence of wine tourism. As Juan Nogué (2007) points out: "the landscape is today and yesterday, present and past, and yesterday –the past– falls into the category of what is not visible to the naked eye; it falls into the category of the almost invisible, although always present: they are the historical heritage, the continuity, the permanence, the superimposed layers of ancient landscapes". In the conception of the development of Argentine wine tourism, landscape is an essential part both shaping the identity of Argentine wine tourism and providing a differentiated character and identity to each wine region, from Patagonia, through the region of Cuyo, until reaching the north of Argentina or the coastal regions (Figure 1). There is a distinct and defined identity in each of their landscapes.

Figure 1.

The landscape of Los Caminos del Vino in Argentina



Source: Courtesy of the photographer Gustavo Sabéz.



Regarding landscape, a complex concept with multiple meanings, and it has been interpreted differently according to the approaches of the different areas interested in its study. From a heritage perspective, it has received the attention of world organizations and the term landscape was already expressly mentioned by the UNESCO Convention concerning World Cultural and Natural Heritage in 1972 (Girini, 2003). It was precisely there that the concept of “Cultural Landscapes” was incorporated as a new category and it has been essential in our conceptual framework. We understand the cultural landscape as the combined work of nature and man. They illustrate the evolution of society and human settlements over time, under the influence of physical restrictions and / or opportunities presented by their natural environment and of successive internal and external social, economic and cultural forces (Girini, 2008).

With all the wealth of resources, wine tourism has allowed the producing provinces to achieve a place in Argentinian tourism that they did not have before. This also gave them the possibility of generating wealth and genuine employment, developing a policy in which the State and the private sector have gone hand in hand. The objective is for Argentina to be identified in terms of wine tourism, with its strengths and weaknesses, and much has been achieved. Led by Mendoza, with this baggage of ideas, the wine provinces have worked for several years to consolidate a new tourist activity.

There was also a product promotion drive at national and international levels and an ongoing action by the private tourism sector was initiated through the institutions and chambers of the wine sector. The Bodegas de Argentina acted as the executive unit of the Strategic Wine Plan, and Wines of Argentina, adding wine tourism to the promotion of Argentinian wine around the world and supporting the promotional actions of Argentinian tourism. As wine tourism grew consistently in importance in the portfolios of tourist products both of the provinces and Argentina itself, the importance of incorporating wine tourism as a strategic tool for positioning wine was determined.

This increase in wineries opening up to tourists in Argentina should not be taken simply as a quantitative fact. Behind this decision there was an adaptation of the structure, aesthetics, staff, work philosophy and a search for innovation, reinventing itself to improve its image and not lose to the competition. There was also an increase in specialized travel agencies, hotels, inns and themed resorts capable of accommodating a greater number of tourists in the wine-growing areas. In this way, wine regions such as the Uco Valley, Cafayate and other areas, which until not long ago had only been destinations for hikers, where overnight stays did not exist, were transformed into highly important wine tourism destinations to enjoy of a very rich and complete wine tourism experience.

The same has happened with the gastronomic establishments that prepare increasingly sophisticated dishes, designed to pair with different types of strains and using local ingredients to achieve a community between the visitor and the identity of the location. Most of the restaurants in wineries or in the wine regions renovated their cellars and incorporated wine bars. The change also occurred among Argentinian consumers as in many parts of the world, enabling the enotourist arriving in the wine regions to already know how to order and consume, giving rise to a demand for very high quality as well as a highly sophisticated level of service.

Another factor driving change was the quality of the human resources. A few years ago, on opening a new establishment, its managerial and operational staff often had to be transferred from other areas.



Thanks to the fact that in recent years many educational institutions in the regions have added tourism and gastronomy to their academic offers, this has changed for the better, and new professionals with adequate training to offer the services wine tourism demands were incorporated. For this reason, we always state that a people's revolution occurred in Argentina, and especially in Mendoza. Human capital has been one of the key factors in the transformation.

A new concept of winery has emerged, that which integrates a visitor circuit and follows the wine route from the reception of the grapes to the distribution. Nowadays there are clean, safe and technically planned routes that offer an image that enriches the product and generates a positive synergy with the quality of the wines, working on the entire wine tourism experience and structuring the available space. As a result, wine and good drinking have become an integral part of the Argentinian tourist offer and a highly sought after trend both by those who come to the country and by domestic tourists, which exceeds two-thirds of the total number of wine tourists.

Architecture is one of the factors that has contributed the most to the transformation and is one of the main attractions that engage visitors. Winery architecture in Argentina, both innovative and challenging, has joined the historical and heritage scene, based on the concept that it cannot be decontextualized from the territory in which it is established, since it is part of its culture, identity and story.

The beautiful and emblematic architecture of wineries, characteristic of the Mendoza of the late nineteenth century (buildings which can still be seen today) began their decline in the 1930s. For more than half a century into very practical industrial warehouses, but with little concern for charm, typical of an industry that did not seek quality but volume. Everything changed from the globalization of the industry and the search for sophistication. The new wineries went into quality-oriented production mode, with a reduced production capacity, compared with those large buildings that produced millions of litres. In the new concept, large and modern spaces do not necessarily imply large production volumes. On the contrary, the productive sector is part of an environment in which there is also a growing dedication to wine tourism.

Architecture in Mendoza and Argentina has contributed enormously to the prestige and attractiveness of wine tourism. It is aiming, from the recognition of its historical dynamics, its nature, and its society, for quality of life with identity. As Bórmida (2016) points out: "we believe in a territory that develops in harmony, enhancing the strengths of its cultural heritage, and that is conveniently inserted into the multiple networks of today's global world."

The surroundings with natural landscapes ringed by vineyards, often of a desert-like immensity, has a preponderant role in architecture. The native flora is increasingly incorporated into the design, the idea being to integrate the context which one intends to showcase, not to attack it. The wineries built in this environmentally sustainable trend are no longer surrounded by green gardens that have nothing to do with the desert environment, but rather attempt harmony between the construction and the landscape's own resources (Figure 2). Architectural projects have integrated socio-cultural aspects, the natural and cultural landscape, the environment and the productive and commercial system from tourist resources of the region such as history, tradition, heritage, culture, landscape, gastronomy, architecture, production, in short, all the resources that make up its identity (Bórmida 2016).



Figure 2.

The landscape of The Wine Roads of Argentina



Source: Courtesy of the photographer Gustavo Sabéz.

In Argentina, wineries such as Salentein, Séptima, O. Fournier, Vistalba, Catena Zapata or DiamAndes were works of contemporary and avant-garde architecture. They were pioneers and initiators of a trend of iconic architecture in Argentina that changed the concept of winery architecture from its roots and which, due to their creativity and majesty, are called cathedrals of wine. Many investors and traditional agents of world viticulture have opted for important architects, who are responsible for the wineries taking this great step towards modernisation. Adding their rich diversity there are also many simple, family wineries in the different regions of the country which, although they do not make large investments in architecture, offer a wonderful possibility of living a unique visitor experience.

3. The Geography of Wine Tourism in Argentina

More and more provinces produce wine. With the repeal in 1998 of a 1934 law prohibiting new vineyard operations and dismantling some existing productions, such as in Entre Ríos, (which had been producing since the end of the 19th century) terroirs were recovered and the number of producing provinces, currently allowing viticulture, together with wine tourism, to develop in 18 of Argentina's provinces: Mendoza, San Juan, La Rioja, Salta, Catamarca, Córdoba, Neuquén, Río Negro, La Pampa, Buenos Aires, Tucumán, San Luis, Chubut, Entre Ríos, Santiago del Estero, Misiones, Jujuy and Santa Fe (Figure 3).

This production takes place in valleys across the length and breadth of the territory, with a diversity of landscapes and agro-ecological factors affecting the vines, between parallels 22° and 40° South. The Cuyo region includes the provinces of Mendoza, San Juan and small producers in San Luis. The province of Mendoza, where 70 % of the country's wines are made, is undoubtedly the heart of winemaking in Argentina. Mendoza is the main reference for wine tourism in Argentina. The most traditional wineries, which have been preparing for tourist visits over the last two decades, are to be found in Luján de Cuyo and Maipú there are.



Figure 3.
Map of the Wine Valleys of Argentina



Source: *Wines Of Argentina*.

As in other regions of the country, tourism areas, restaurants, museums, spaces for conventions and other artistic and recreational activities have been established. To the south you can visit San Rafael and General Alvear, with wineries and terroirs, where you can see the imprint left by immigration. The Uco Valley is the emerging and most dynamic region in Argentina in terms of wine and wine tourism. At heights of between 1,000 and 1,500 meters and imposing landscapes, it is an ideal area for growing grapes. The largest production in volume in the province of Mendoza is in the east and, although it has fewer wineries open to tourism, it has traditional wineries and a strong wine-growing identity. The other prodigious producing area of Cuyo is San Juan, where there are wineries open for visits in the foothills and traditional valleys of Tulum, Ullum and Zonda, and its emerging high-altitude valleys such as Calingasta or Pedernal.

Another important producing region is the northwest, which includes La Rioja, Catamarca, Salta, Tucumán and Jujuy. In La Rioja¹ Chilecito, the epicentre of winemaking in the province stands out, and the Famatina Valley to which Aminga and Chañarmuyo and the Camino de la Costa have been added, a route that surrounds the Velazco hill with several wineries with an ancient winemaking tradition, many of them artisanal producing small amounts of 'grappa'. In Catamarca we can find the 'Ruta del Adobe' with its main wineries located in Fiambalá, in Chañar Punco and the Santa María Valley.

¹ Torrontés is grown in La Rioja, which is widely recognized internationally for its high oenological value. It is only found in Argentina and is consolidated an emblem of the country's white wine. There are three variants of Torrontés: the Mendoza and the San Juan, more apt for fresh consumption, and the Riojan which is the most widely cultivated and the one that expresses the best qualities of the varietal, very fruity and dry at the same time, in addition to La Rioja, those of the Calchaquí Valleys in Salta also stand out.



The town of Cafayate, in the province of Salta, is important for its production of high-altitude wines and its tourist development. It is the main reference in the framework of the splendour of the Calchaquí Valleys, between hills and vineyards. Starting in Tucumán, to the south of the valleys and reaching Cachi, it constitutes a magnificent route. In addition, Colomé, Molinos and Tacuil, where the highest Argentine vineyards are stand out, together with those of Jujuy, on the border with Bolivia, which in recent years have been developed with great success, neither more nor less than in the Quebrada de Humahuaca². In addition to the vineyards between Maimará and Tilcara, there are vineyards in Huacalera, at heights of up to 3,700 meters above sea level, precisely on the Tropic of Capricorn. Northern Argentina has a considerable volume of wine tourism resources such as culture, gastronomy, folklore and nature, which positions it as a highly relevant destination.

Córdoba, in the centre of the country, produces less wine, both in terms of quality and quantity, than the Northwest and Cuyo, although it is very traditional and there are interesting production areas. There are some wineries which cater for tourists, taking advantage of the important visitor flows from the inland province. Although the history of Cordovan wine began with the Jesuits in the seventeenth century, Italian immigrants from Friuli were the ones who settled in Colonia Caroya in the middle of the nineteenth century, and were a great reference for Cordovan wine and the country's famous cheeses and salami.

The Patagonian region includes Neuquén, Río Negro and small production areas in Chubut. It is one of the southernmost regions in the world where fine grapes are grown. In addition, it is an excellent region for nature and adventure tourism. The oldest vineyards are found in the Alto Valle de Río Negro. In recent years in it has worked in synergy with the important wineries in San Patricio del Chañar in Neuquén. La Pampa has also established vineyards, as has Entre Ríos, where its winemaking tradition is being reborn. In the Province of Buenos Aires there are more and more wineries to visit both in the mountains as well as by the sea, in Chapadmalal, in the vicinity of Mar del Plata.

4. The Status of Wine Tourism in Argentina

The best source to analyse the situation of Argentine wine tourism is the study of the Wine Tourism Observatory of the National University of Cuyo in 2018, carried out together with Bodegas de Argentina and the Nation's Ministry of Tourism. The objectives of the study were to identify the amount of wine tourism services offered in Argentina, measure the main characteristics of wine tourism service providers, the volume of visitors, and characterize wine tourists.

According to the study, between 2013 and 2018, wine tourism experienced a 23 % growth and a 100 % increase over the previous decade. Regarding the number of wineries open to tourism, there are a total of 245, of which 146 are in Mendoza, confirming its national leadership. The evolution has been remarkable, since: in 2013 there were a total of 199; in 2009, 160; and in 2006, 117. Of the total number of wineries, 47 % had opened to wine tourism in the previous 9 years and 22 % in the

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² The Quebrada de Humahuaca is one of the most unique landscapes in north-western Argentina and was declared a World Heritage Site by the United Nations Educational, Scientific and Cultural Organization (UNESCO) on July 2, 2003.



previous 3 years. In addition, 8 out of 10 wineries are medium and small (producing less than 5 million litres per year) and 7 out of 10 wineries are 100 % national Argentinian capital.

Regarding visitors, there was a 17 % increase in the last 5 years and 82 % over the last decade. Regarding their origin, 30 % are foreigners and 70 % are Argentinians, of which 53 % are from the rest of the country and 17 % are local, that is, from each province. Visits to the Wine Roads grew from 400,000 visitors in 2004, to 900,000 in 2009, 1,445,000 in 2013 and 1,689,000 in 2018, increasing over the last decade at an average of 8 % per year. In Mendoza, growth was 70 % in 10 years, with an average increase of 7 % per year.

On comparing the year 2013 with 2018, regarding the visitors' origin, in reference to domestic tourism, the proportion of tourists from the Province of Buenos Aires and the City of Buenos Aires increased, represented 55 %, while in 2013 visitors from that origin represented 40 % of all Argentine tourists.

A structural change in the composition of foreign tourism has also been observed. Brazil contributed 16 % of the total in 2013, becoming one of the fastest growing countries, reaching 31 %. Meanwhile, the United States and Canada contributed 22 % in 2013 and, in 2018, they reached 27 %. Finally, Chile went from 10 % to 5 % of the total number of foreigners in 2018 and the rest of America represents 6 %. The countries of Europe, for their part, fell in that period from 20 % to 14 %. As for Asian tourism, it is still very scarce and is one of the main challenges to face in the future. In general, the origin of foreign visitors is cyclical and has varied according to the year, reaching peaks of 37 % and troughs of 20 %.

The wineries incorporating gastronomic establishments grew between 2013 and 2018, going from 88 to 113. Regarding accommodation, they rose slightly compared to 2013, going from 24 to 37 in 2018. The museums increased in those years from 10 to 40 and the art rooms in the same period went from 12 to 51. One of the most impressive statistics regarding the qualitative changes that occurred in the profile of wine tourism and the process of internationalization of the activity in Argentina were wineries with services in English, which went from 100 to 179.

Regarding the procurement of tourism services, almost 8 out of 10 wine tourists arranged their travel services directly and the rest did so through travel agents. The use of travel agencies is more relevant when we look at tourists who come from Europe and Brazil. An interesting fact is that 36 % of wine tourists began planning their trip between a week and a month before reaching their destination. This proportion, slightly higher in the case of national wine tourists, does not change significantly in foreign tourists, since 34 % began planning their trip between one and six months in advance. 36 % of wine tourists stated wine tourism as their main reason for deciding to visit the town. For the rest, the main reasons were recreation and fun, and were complemented primarily with visits to other rural places and regional cuisine.

The average length of stay at the destination is 4.5 days, with no significant variation according to the visitor's place of residence. 45 % of the visitors stayed in 3- and 4-star hotels (53 % if 5-star hotels are also added). 11 % of the wine tourists stayed in the houses of relatives or friends and 10 % in cabins.



Upon analysis of the reasons for visiting a winery, it was found that the main ones were to get to know a particular winery, have fun, rest, and taste and learn about wines. Regarding how the tourist services offered by wineries became known, it follows the same trend as other tourist destinations, with a sharp decrease in the role of the travel agent. 32 % did so online, 29 % through family or friends and only 27 % accessed through travel agencies.

Regarding winery visitor characteristics, they are divided between men and women in similar proportions, the most represented age range being between 30 and 44 years. 61 % of visitors of legal age have completed university education; as for the relationship between the members of groups visiting the wineries, 37 % are couples, 25 % families, 15 % groups of friends and 13 % travel alone.

Finally, the average daily expenditure at the destination reaches 49 dollars, the main component being the hotel industry, with 40 % of daily expenditure. The total cost during the entire stay, depending on the place of residence, is \$ 149 per wine tourist in the case of Argentinians, \$ 391 for those from Brazil, \$ 431 for visitors from the United States and Canada, and \$ 441 for visitors of European origin.

5. Conclusions

Wine tourism activity has experienced huge growth in Argentina in recent years. As in other parts of the world, it has been a primary factor in the creation of wealth and employment and has appreciated the tangible and intangible heritage of the country's wine regions. The integration of wine and tourism has also taken advantage of the increase in world tourism flows, the greater consumption of quality wine and the curiosity to know more about the origin and the production process. Wine identifies the uniqueness of a place and constitutes a value and a cultural and heritage experience. Wine is a resource that, once showcased, turns into a unique and unrepeatable experience to be lived

Over the last two decades, with its extraordinary development in vast regions of the country, Argentina has shown everything that wine tourism has to offer, an activity capable of sharing the magical experience that wine gives us from the vineyard to the glass, with its people, its landscapes, its identity, its stories and its culture.

The COVID-19 pandemic has had a major impact on wine tourism in Argentina due to the fact that it is oriented towards attracting visitors, both foreign and domestic, from outside the producing regions. The recovery of post-pandemic wine tourism will be in stages, first by local tourists, then nationals, and then foreigners. There will be a growth in sustainable tourism which wine tourism is a part of, with a preference for trips with lower environmental impact, activities aimed at benefiting local communities and the conservation of natural environments. The great challenge will be to comprehensively design the spaces and products of the wine tourism destinations to meet the consumption and health requirements, with special emphasis on the care for, and safety of, travellers and respect for the environment.



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Wine Tourism in Australia

Marianna Sigala

University of South Australia (Australia)

Abstract

Despite the numerous crises and challenges hitting the industry, the Australian wine (tourism) industry has remained resilient and highly competitive. Even if it belongs to the New World, the Australia wine tourism offering is quite mature but continuously evolving, rich, unique and innovative. This chapter identifies and discusses the major success factors contributing to the competitiveness and innovativeness of the Australian wine tourism industry as well as the ways in which the latter contributes to sustainable development. The chapter starts by describing wine tourism in Australia in relation to its wine regions, winescapes and wine experiences. Several cases of Australian wine tourism are provided to better illustrate the arguments. The chapter concludes by discussing the future challenges of the industry.

1. Introduction

Although Australia is a wine region of the New World, its wine tourism offering is quite mature and continuously evolving, varied, authentic and contemporary, differentiated and unique. Wine tourism in Australia demonstrates innovativeness and freshness with wine (tourism) operators possessing highly dynamic and resilient capabilities to continuously upgrade and update their offerings and operations (Sigala & Robinson, 2018). The latter has greatly helped the industry to become resilient and maintain business continuity and international competitiveness despite many current challenges (e.g. bushfires, COVID-19, climate change, sophisticated demand).

The wine sector and wine tourism in Australia represent a major export industry for the country, a major contributor to the national GDP and to the country's appeal in the competitive tourism map. For example, the wine sector generates about 40 billion AUD annually to the Australian economy (Wine Australia, 2020). Consequently, the Australian wine (tourism) attracts attention and investments not only from the private sector, but also from governmental bodies at all levels (federal, state and regional governmental agencies and organizations). Wine tourism in Australia is recognized and used as a major vehicle to drive not only regional economic development, employment and entrepreneurship, but also to generate sustainable development by fostering synergies and multiplier effects in various industries (e.g. food, arts/creative industries) and by supporting socio-cultural preservation, appreciation and development (Sigala, 2020).



This chapter provides an overview of the wine tourism in Australia by identifying and discussing the major features of the Australian wine tourism destinations and experiences as well as the major factors contributing to the outperformance and success of the Australian Wine Tourism. To achieve that, the chapter analyses the roles, activities and best practices of some of the major wine tourism stakeholders in Australia, namely, wine tourism operators, governmental organizations and industry associations. Special attention is paid in unravelling the collaboration and co-opetition practices amongst all these stakeholders, since co-creation for creating business value and effective customer value propositions is advocated as one of the most important success factors in wine tourism (Sigala & Robinson, 2019). Australia provides numerous exemplar cases of sustainable wine tourism development for wine tourism operators and destinations alike and the chapter analyses some of them before concluding by discussing the future challenges of the industry.

2. Wine Tourism in Australia

2.1. Wine (Tourism) in Australia: History and Evolution

Australia is home to some of the oldest vines in the world dating back to the 1850s; being phylloxera free (apart from few areas), Australia features many very old, ungrafted vines. Today, Australia produces just 4 % of the world's wine, but is the fifth largest exporter by volume behind the traditional wine-producing giants of Italy, France and Spain (Wine Australia, 2020). In 2010, Australia featured just below 160,000 hectares of vine-bearing area with over 2,000 producers using 1.6 million tonnes of grapes for wine production (UWEA, 2020). Australian wine regions produce more than 100 different grape varieties varying from the most popular red (Shiraz, Grenache, Cabernet Sauvignon, Pinot Noir, Merlot) and white (Riesling, Chardonnay, Semillon, Muscat, Pinot Gris, Sauvignon Blanc) to less known Mediterranean varieties including Vermentino, Barbera, Sangiovese, Nero d'Avola. Actually, due to climate change many regions and grape growers are increasingly looking into and planting grape varieties that are more resilient to droughts such as Assyrtiko and Robola from Greece and Fiano from Italy.

The first vines (from Brazil and the Cape of Good Hope) arrived in Australia with the First Fleet in 1788, but they never flourished due to the heat and humidity at Sydney Cove (UWEA, 2020). James Busby is renown as the first viticulturist in Australia by bringing more European varieties and starting vine plantation first at the Botanical Gardens in Sydney and later at his Hunter Valley property in 1825 (UWEA, 2020). Subsequent cuttings made their way to various parts of New South Wales, Victoria and South Australia and so, many of Australia's old vines trace their history to the original Busby collection (UWEA, 2020). Hunter Valley (a worldwide famous wine region) is the first commercial region in Australia with Wyndham Estate being established in 1828. By 1850 commercial vineyards were established and productive in all Australian states.

Since then wine tourism in Australia grew steadily and increasingly, as wine drinking and going out to wine destinations and cellar doors (as a day out, weekend break or leisure/entertainment activity) is part of the Australian culture and lifestyle (Sigala, 2019a). Hence, wine tourism attracts the increasing popularity of the burgeoning lifestyle of Australian citizens, but also immigrants who adopt wine tourism as a way to integrate, acculturate, socialize and become part of the Australian society (Sigala, 2019a).



This strong support of the local residents to the local industry is also evident by market research showing that Australian wine tourists represent consumers of all socio-demographics (in terms of age, income, educational level, gender) and mixes of people including all three generations (e.g. parents, children and grandparents). Consequently, Australian providers need to develop and provide a variety of wine tourism experiences in order to satisfy the needs and the social and work-life preferences of all segments (e.g. from family and business events, to formal and informal, outdoor and indoor edutainment, hedonic and functionalistic and educational activities). Wine tourism is well embedded within the Australian lifestyle, and Australians' did not give-up their wine habits despite the COVID-19 lockdown. Most wine tourism operators and Australian wine tourists quickly adopted technologies to virtually distribute, experience and co-consume their favorite wine tourism experiences (e.g. virtual wine tastings, virtual tours to wine destinations, cellar doors, wine festivals, social drinks events). Overall, the Australian consumer market is a major push and back-up to the Australian wine (tourism) industry.

From an international perspective, 2013 represents a major milestone in the recognition, development and evolution of the Australian wine tourism industry. In 2013, Tourism Australia (the governance body of tourism at a country level in Australia) commissioned a study investigating the behavior of 15 of Australia's key tourism markets. The findings showed that 'food and wine' followed by 'world class beauty' were named as the major factors in holiday decision making, but they also revealed an interesting gap: from those who have not been to Australia only 26 % associated it with 'good food and wine', while this figure rose dramatically to 60 % among those who have visited the country. Thus, although food and wine are major factors contributing to the memorable experience of international tourists in Australia, Australia was lacking the capacity to tap into this market potential, as only those that have been in Australia knew about its food and wine and were able to promote it. To address that, in 2013 and 2014, Tourism Australia announced two campaigns respectively ('*There's nothing like Australia*' and '*Restaurant Australia*') to place the spotlight on Australia's finest array of produce served in the most stunning locations in the world. This governmental initiative was followed by a button-up co-opeting initiative initiated by award-winning wineries/cellar doors (called Ultimate Winery Experiences of Australia UWEA¹). Endorsed by Tourism Australia and State Tourism Organisations, the UWEA aimed to enhance these efforts to unlock the international potential of food and wine tourism for Australia by building cooperation models within and across wine and tourism industries as well as between private organizations and governmental bodies. The initial purpose of UWEA was to underpin the key messages of the Restaurant Australia campaign and optimize the opportunity it presents to the Australian wine industry (Sigala, 2019b). By forming partnerships, UWEA continues to aim to grow international visitation by positioning Australia as a leading wine destination by highlighting and showcasing the products, the place and the people responsible for *exceptional food and wine experiences* across the country.

Figures from current market research confirm the results of all these combined efforts: food & wine represent one of the top three motivational drives of international tourists to Australia amongst aquatic & coastal, nature & wildlife experiences (Tourism Australia, 2020).

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1 <https://www.ultimatewineryexperiences.com.au/>



In Australia, wine routes are not developed in the same way as in Europe. Regional and local governmental agencies have however developed touristic routes whereby wine experiences are part of broader tourism theme and combined with other experiences. These routes usually cover wide regions, they frequently combine multiple wine regions and so, a tourist can take as long as he/she wishes to 'complete' this route, i.e. from one day to one month or one year. The routes cover long distances and numerous local providers allowing everyone to personalise and customise his/her own itinerary to his/her own preferences, time constraints, accompanying persons and/or context/situation of visitation. For example, in south Australia, the South Australia Tourism Commission (the state governmental body responsible for tourism promotion), has created these two routes that embed wine experiences and wine tourism providers in their itineraries:

- The Epicurean Way²: the premier food and wine touring route covering four of South Australia's iconic regions – McLaren Vale, Adelaide Hills, Barossa Valley and Clare Valley. Tourists have the opportunity to enjoy some of Australia's best wines and finest culinary experiences local produce prepared by award-winning chefs in settings that combine history with modern refinement.
- The Explorer's Way³: a 3000 kilometre journey from Adelaide to Darwin taking visitors through the Clare Valley, one of South Australia's famous wine regions, before making its way to the spectacular Flinders Ranges and into the outback. The Explorer's Way combines a taste of the fascinating Australia outback with a fine wine experience at Clare Valley.

2.2. Wine Destinations in Australia: Winescape Features

There are currently 65 wine regions in Australia (with approximately 2.500 wineries and over 6.000 grape growers) mainly located on or near the coast and extending from north in Queensland (Granite Belt) to the south on Tasmania island (Southern Tasmania and Tamar Valley) (Wine Australia, 2020) (Figure 1). This big range of climates, soil types and varietal mixes make the Australian wine tourism offering very diverse, culturally different and appealing from many perspectives, namely historical, architectural, geological, natural (fauna and flora), social and anthropological (aboriginal, local communities, culture and lifestyles). This richness and diversity also make the Australian wine tourism offering and winescapes unique and appealing to a greater variety of wine tourism market segments satisfying the wine and/or tourist needs and preferences of various people (from wine lovers to families traveling with kids, from wine experts to tourist and nature explorers and hedonic/pleasure tourism seekers).

Some Australian wine regions have become top global wine tourism destinations, such as Hunter Valley (outside of Sydney and Newcastle) in New South Wales; Barossa Valley, Clare, McLaren Vale, Adelaide Hills and Coonawarra) in South Australia; Margaret River and Swan Valley in Western Australia; Yarra Valley and Mornington Peninsula in Victoria. It is not surprising that these world-class and known Australian wine destinations are also located close to state capital cities (e.g. Melbourne,

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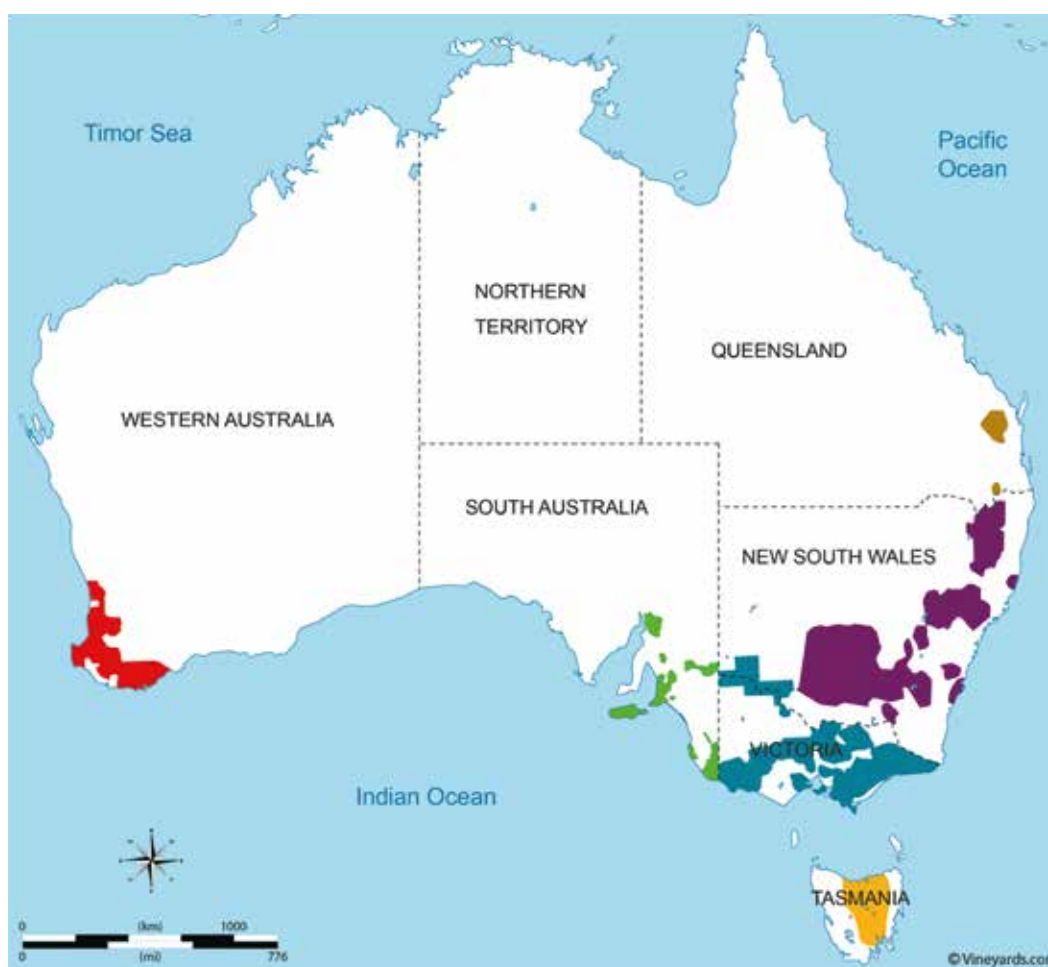
2 <https://southaustralia.com/travel-blog/epicurean-way-road-trip>.

3 <https://southaustralia.com/travel-blog/explorers-way-road-trip>.



Sydney, Adelaide and Perth), enabling them to benefit from the burgeoning, the stability and critical size of the local urban population and attract the international tourists visiting the popular Australian capital cities. These popular wine tourism destinations feature more than 200+ wine tourism-related operators including cellar doors, accommodation, tour, travel and transport organizers and companies (e.g. bike, car, Segway, helicopter rentals), cafes, pubs and restaurants, distilleries, recreational and leisure parks, chocolate, cheese, honey and other local food/wine and artisan product operators, factories and attractions.

Figure 1.
Wine regions and destination in Australia



Source: Vineyards.com

For example, Swan Valley (a relatively small geographical area 50 km east of Perth and accessible by suburban train) features more than 150 attractions within a loop of 32 km. This high density of tourism attractions makes this wine region a major wine tourism 'playground' featuring numerous and varied wine-related businesses ranging from tourism facilities and accommodation, world-class



wineries (such as Sandalford wines and Mandoon Estate), breweries, distilleries, countless gourmet artisan goods to handcrafted wares, bustling markets, vibrant studios and top-notch eateries.

South Australia and its capital city Adelaide is Australia's wine capital and the industry's heart and soul, as it produces 50 % of all bottled wine and about 80 % of premium wine in Australia (PIR SA, 2020). Hence, it is not surprising that Adelaide represents Australia as a Great Wine Capital of the World⁴. It features: 18 unique and distinctive wine regions (75,500 hectares of vineyards) with a proud history dating back to the 1800s; the largest grape-growing region in Australia (Riverlands); 720 wineries, 3,400 grape growers and 350+ cellar doors (200 within an hour's drive of the capital city of Adelaide) (PIR SA, 2020). Some of the wine regions are more known as grape growing than wine regions and/or tourism destinations that are still trying to create their the brand image, reputation and tourism offering (e.g. Padthaway, Wattonbully and Riverland); some other wine regions are world-known and top-class wine regions and tourism destinations (e.g. Barossa, Clare, McLaren). South Australia wine regions possess valuable resources with distinctive features: old and prestigious wines (such as Penfold's Grange and Henschke's iconic Hill of Grace Shiraz⁵); a great variety of modern (e.g. The d' Arenalberg Cube) and traditional/heritage (e.g. Bleasdale, Yalumba, the nation's oldest family-owned winery, Sevenhill Cellars established by Jesuit priests who first planted the vines to make sacramental wine), small (e.g. Rockford) and big (e.g. Accolade Wines), boutique/luxury (e.g. St Hugo) and mass market (e.g. Jacobs' Creek) cellar doors and/or winemakers, wine tourism 'integrated resorts' co-locating many operators (e.g. LOT.100 winery, local food market and distillery; Chalk Hill Winery, distillery and pizzeria; Seppeltsfields winery, cellar door, Fino restaurant, JamFactory, accommodation, function space and Vaisse Virgin).

South Australia recognizes and supports its wine regions as significant economic and cultural assets. The contribution of wine (tourism) to the state's economy is clearly evident in the following 2018-2019 performance metrics (PIR SA, 2020 and SATC, 2020):

- Food and wine industries generated 15.2 billion AUD.
- Wine alone generated 2.28 billion AUD (1.92 billion representing wine exports to 97 countries around the world).
- South Australia's visitor economy hit a record \$ 8.1 billion in 2019. Wine is a key drawcard for our international visitors, with 36 % of all international visitors visiting wine regions while in South Australia.

Consequently, the state invests a lot in research & development in relation to viticulture, winemaking, wine business and wine tourism. Adelaide is home to the National Wine Centre, national and state industry organizations (e.g. Wine Australia, Wine Industry Suppliers Australia, PIRSA, Wine Communicators of Australia), major wine education and research and development institutions (e.g. WAITE Campus, Adelaide University and University of South Australia).

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4 <https://www.greatwinecapitals.com>.

5 Henschke's iconic Hill of Grace Shiraz is produced each year from vines that originate from material brought from Europe in the 1860s.



2.3. Wine Tourism Experiences in Australia

Wine tourism experiences are the *raison d'être* of wine tourism and so, their design is an equally important factor as the winescape to drive and satisfy demand. The Australian wine tourism industry provides a great diversity of memorable and meaningful wine tourism experiences that can appeal and satisfy any type and sophistication level of wine tourists. The wide spectrum of the Australian wine tourism experiences are inter-related not only with the products, but also the economic space, the socio-cultural elements and the people behind the Australia's winescapes (Sigala, 2019d). By embedding the socio-cultural and physical elements of the winescape within the design of their wine tourism experiences, the Australian wine tourism operators have excelled in elevating and converting their offerings from simple sensorial, aesthetic and cognitive experiences to transformational experiences (Sigala, 2019e). This is because it is the socio-cultural elements of the winescape that can trigger and inspire the spiritual engagement of the wine tourists to help them learn, re-think and re-set their social values, practices and behaviors. By challenging their minds and learning processes, the wine tourists can gain benefits that go beyond the emotional, sensorial, hedonic and functional benefits provided by traditional wine tourism experiences. Sigala (2020) and Sigala & Rentschler (2019) provide various examples of such transformational wine tourism experiences available in Australia (e.g. art-based wine tourism experiences) that help wine tourists and stakeholders to uplift their (social, emotional, cognitive, psychological and financial) well-being.

Hence, the Australian wine tourism experiences have evolved to be more than simply visiting wineries, tasting and purchasing wine. Instead, they represent experiences that go behind the scenes and beyond the cellar doors of individual to represent activities (social practices) that are performed in and shaped by the socio-cultural fabric of their winescape ecosystem. To appeal to a wide market and satisfy the increasing sophisticated demand, Australian wine tourism operators offer various wine tourism experiences that provide some or all of the following characteristics: Escapist, aEsthetics, Educational and Entertainment (e.g. Quadri-Felitti & Fiore, 2012; Thanh & Kirova, 2018); and/or spiritual/Existential engagement (Sigala, 2019d and 2019e). Some illustrative example of such interactive and immersive experiences includes:

- Tutored wine tastings.
- Meet the winemakers.
- Winemaking and blending lessons.
- Wine/food festivals and (art) events; celebrations and milestone festivities (e.g. weddings in vineyards, birthday parties).
- Winery tours revealing stories about the wine families and winescapes.
- Scenic regional flight and balloon flights.
- Behind the scenes winery experiences.



- Outdoor activities such as: relaxing or adventure bike rides: e.g. Clare Valley's 33-kilometre Riesling Trail; adventurous 4WD tours; Segway tours amongst the vines; wine and hike trails.
- Sensorial experiences: wine & food pairing classes; degustation, fine dining experiences, "pick and sip" winery tours at the Wine Sensory Garden (Whicher Ridge) that hone all senses to help ascertain wine flavors, textures and styles.
- Immerse in nature, environmental education: Kangaroo Island winery experiences with whale and seal watching; Banrock Station's award winning experiences environmental protection and restoration within its giant wetland area protected under the Ramsar Convention.
- Wine experiences shaped by and with the socio-cultural fabric of the winescape: e.g. free-to-listen podcast series and wine stories⁶ that reveal how wine connects to Aboriginal custodians, big wave surfers and mountain bikers, share local love stories that have led to surprising collaborations, investigate family dynamics, celebrity interactions and the human instinct to succeed, as well as look at the pivotal role the area's extraordinary natural environment plays.

Overall, this section clearly demonstrates the maturity, sophistication and professionalism of the wine tourism in Australia that has evolved and developed by benefiting, embedding and respecting/growing the rich resources of its unique winescapes including (Bruwer *et al.* 2016): tourism infrastructure (e.g. accommodation, hospitality); accessibility and mobility to and within wine regions; tourism and wine experiences and activities; physical and cultural resources (e.g. landscape, fauna/flora, and geology, architecture, history, local events); people and human resources (e.g. communities, skills, entrepreneurship, lifestyle); quality and brand name of the wine, the tourism and the destination offerings.

3. Success Models and Drivers of Wine Tourism in Australia

Possessing wine tourism resources is not sufficient to drive success. Resources can provide a comparative advantage, but it is their effective management and development that can provide a wine tourism destination and companies a competitive advantage. In this vein, the Australian wine tourism industry might be blessed with rich resources, but its competitiveness and outperformance are critically based on important players and their practices to appreciate, valorise and grow these resources. Such players and their practices contributing to the success of the Australian wine tourism sector are found at a micro –individual entrepreneur level and at a macro– destination ecosystem level. The Australian success model is also based not only on the isolated practices of these wine tourism-related players found at these two levels, but most importantly at the co-ordinated and orchestrated practices developed between all these wine actors and levels. It is the synergies, dynamics and value-added that are built through their collaborative and co-opetitive business practices and models that make the Australian wine tourism sector complex and difficult to imitate.

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6 <https://www.margaretriver.com/wine-uneearthed/>.



At a micro level, the Australian wine tourism sector is rich with numerous, dynamic and creative entrepreneurs (sometimes even spanning many generations) including grape growers, tourism operators, event organizers, wine makers, wine educators, viticulturists. Examples of distinguished entrepreneurs include Chester Osborn, Chief Winemaker & Viticulturalist, a charismatic and creative mind, designer and conceptualizer of The D' Arenberg Cube, the iconic cellar door that positioned McLaren Vale on the global wine tourism map (Sigala & Rentschler, 2019). Recently, other entrepreneurs have shown their creativity and resilience to COVID-19 by exploiting existing technologies to provide and live stream wine tourism experiences (e.g. the Pyjama wine entrepreneur⁷, the wine social media celebrity Unico Zelo⁸, and the virtual wine tourism tours⁹).

The entrepreneurial skills but also their willingness and abilities to inspire, nurture and build synergies and collaborations with other entrepreneurs along but also beyond the wine (tourism) supply chain (e.g. creative industries, health sector and sports) have enabled them to enrich and expand their wine tourism offering, learn from other sectors, increase business flexibility. Examples of such collaborations and networks include:

- The Australia's First Families of Wine (AFFW), a unique collaboration of wine companies with custodianship of some finest Australian vineyards such as Yalumba, Taylors, d'Arenberg, Henschke and Jim Barry Wine.
- The Seppeltsfield Road Business Alliance Inc. (SRBA)¹⁰ which was incorporated in 2004 and currently recognized by industry bodies as a prime example of a collaborative practice of businesses and individuals to enhance tourism and sense of community in Seppeltsfield Road, which is a significant historic tourism precinct within the Barossa Valley. The Alliance was formed to provide an opportunity for businesses and individuals located adjacent to Seppeltsfield Road, to work together to promote this unique, premium part of the Barossa Valley, increase visitation, network and foster community spirit and its heritage. It comprises over 40 businesses, organizations and interested individuals (e.g. wineries, accommodation providers, restaurants, bike rental companies) working together in a voluntary capacity on various projects (community events, co-operative marketing) to meet tourism and community objectives.

The Australian wine tourism industry also benefits from increased labor mobility within the sector: for example, winemakers going from one grape grower/cellar door/wine region to another and/or starting up their own business, they take with them their know-how and specialist knowledge and experience. The latter is important to empower the new employer, the new business or new wine region/destination to learn and evolve from previous practices. For example, this is the case in Riverland a traditionally grape growing region that is currently being built as a wine tourism destination with the support of winemakers and cellar door managers moving from other winemakers and regions to Riverland.

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7 <https://www.thefruitfulpursuit.com/events/pyjama-wine>.

8 <https://www.facebook.com/UnicoZelo/>.

9 <https://cellardoorwinetours.com.au/virtual-online-wine-tasting-tour/>.

10 <https://www.seppeltsfieldroad.com/>.



At a macro-destination and ecosystem level, the Australian wine tourism is supported by a great variety of governmental and industry bodies and organizations. Wine Australia is the major national body supporting the wine industry, and Tourism Australia the tourism industry. At federal and state level the Australian wine (tourism) industry is regulated and has the support of ministries related to trade and investment, tourism, and primary industries. Although this might illustrate a fragmented approach to addressing perplex wine tourism issues pertaining to the different (and sometimes conflicting) budgets, portfolios and agendas of various ministries and departments, there are several examples of co-ordination of actions between such organizations at various governance levels and ministerial borders as well as with many industry associations and the private sector. For example, the wine destination mobile app promoting the wine regions and destinations in the Limestone Coast region¹¹ was developed by the Limestone Coast Grape and Wine Council and co-funded by the federal and state governments, local councils and wine associations. The hop-on-off bus project in Swan Valley is also another example of collaboration between the public and private sector for enhancing mobility and accessibility to and within a wine region to increase its visitation and visitors' spending as well as spread economic benefits off the traditional tourist route (Sigala, 2019c). The previously described UWEA initiative is another example of a coopetitive business model in the private sector endorsed by governmental bodies (Sigala, 2019b). Governmental support includes amongst many others: investment and growth funds, research & development, training, export capabilities, awards and certifications identifying, rewarding and promoting best practices in wine (tourism).

The Australian wine tourism sector also benefits from and is supported by similar practices provided by industry and professional funded and managed initiatives such as, Wine Industry Suppliers Australia (WISA), Wine Communicators of Australia. Major wine conferences, projects and awards are also run by such organizations supporting the wine tourism industry, e.g. the WineTech conference¹².

Wine tourism destinations are also represented and managed by Grape & Wine Associations, which in many regions have expanded their membership to also include tourism related organizations (e.g. McLaren Grape and Vine Association). This is a good example demonstrating the willingness but also the need of the wine (tourism) sectors to work collaboratively but also to seek and build collaborations and networks beyond the traditional wine tourism supply chain.

Overall, the above analyses shows that the success of Australian wine tourism can be attributed to the following factors identified by (Harrington & Ottenbacher, 2016; Sigala & Robitson, 2018): winescapes and attractiveness of the tourism offering at the wine region; the formation of collaborations, networks and alliances amongst wine-related business and organizations; and wine destination branding and marketing activities. Moreover, apart from possessing rich resources, the Australian wine tourism destinations have managed to achieve and maintain competitive advantage by developing and implementing strategies taking care of the following priorities (Sigala & Robinson, 2019; Getz & Brown, 2006):

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11 <https://www.limestonecoast.org.au/locale/limestone-coast-wine-trails>.

12 <http://winetech.com.au/>.



- The management and valoration of their wine-related resources.
- The provision and growth of ancillary, complementing and supporting tourism services, amenities and facilities.
- The management and marketing of the wine destination, e.g. infrastructure, carrying capacity, stakeholders' management, networking, collaboration and conflict, destination image and brand identity.
- The management of the external environmental factors e.g. regulations, climate change, demographic changes, political factors, crises.
- The management of demand issues: visitors' perceptions, satisfaction, experiences.

4. Cases of Wine Tourism in Australia with Sustainable Impacts

The following two cases of wine tourism in Australia show how by embedding the socio-cultural elements of winescapes in the design of wine tourism experiences, one cannot only enrich the wine tourism experiences but also achieve sustainable impacts improving the financial and socio-cultural well-being of all wine tourism stakeholders.

Seppeltsfield¹³ is a multi-award winning cellar door at Barossa (South Australia). It offers a variety of multi-sensorial, learning and transformational experiences that enable visitors not only to taste, but also to connect with and develop themselves by interacting with and learning from the local socio-cultural elements and the humanware (i.e. local artists, producers and residents) of the winescape. The wine tourism experiences of Seppeltsfield expand beyond its cellar door wine tasting. To achieve this, the estate is the home of three other organizations with which it has built collaborations and synergies: Fino Seppeltsfield (the restaurant); the Vasse Virgin (beauty products creator); and the Jamfactory (an arts and craft organization). By co-locating these organizations, the wine estate has developed a wine ecosystem and platform enabling various stakeholders to exchange and integrate (socio-cultural, physical and knowledge) resources for co-creating various types of values that in turn contribute to the economic, socio-cultural and psychological well-being of the estate's stakeholders and their communities.

Since 1991 each May, the Penola Coonawarra Arts Festival¹⁴ (a non-profit organization) runs a three-day art festival within the wine region of Coonawarra, South Australia. The organization brings together a network of partners, friends (including local businesses, residents and Festival supporters) and volunteers for implementing the annual event. The Arts Festival aims to celebrate, promote and support the various genres of local art, the local artistic culture and lifestyle, and the talented local

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¹³ www.seppeltsfield.com.au.

¹⁴ <https://artsfestival.com.au/penola-coonawarra/>.



artists. With food and wine being an integral part of the region's lifestyle, the festival also features many events to promote the local food/wine cultural heritage and products. Indeed, the festival's program always reflects and supports the region's rich cultural heritage and lifestyle. For example, during the 2019 festival, participants revealed, shared and enjoyed secret recipes, nostalgic memories were invigorated, chocolate and wine lovers were treated, while a new regional quince product range was launched. Each year, the program features a great variety of events (usually more than 80 including competitions, exhibitions, farmers markets, food and hospitality events, live performances, workshops) in order to appeal and satisfy the artistic preferences and interests of different demographic profiles and tastes including a special Kids' program. The festival generates attention and buzz in traditional and online (social) media boosting the brand name and recognition of the wine destination. It also attracts many interstate/international visitors and overnight stays (almost half of the festival attendees) which in turn contribute to the local economy directly (by their local spending) and indirectly by becoming ambassadors of the local culture, beauties and lifestyle.

5. Challenges and the Way Forward

A discussion panel including industry and academic wine tourism professional identified the following seven top areas challenging the wine tourism sector in Australia and globally (Lockshin & Corsi, 2020): profitability and sustainability of different wine business models; interrelated risk and opportunities in the wine supply chain; how to stimulate innovation; managing growing social pressure and social license; building regional resilience and managing local growth; conducting research in emerging markets and how to measure the impact of marketing activities there; and accounting for infrequent and non-wine alcohol buyers in research. Social responsibility and sustainability are recognized as top challenges by many other researchers (e.g. Bonn *et al.*, 2020) and their importance in Australia has been magnified after the bushfires in 2020 and the COVID-19 that have devastated and destroyed many wine destinations, vineyards, businesses and flora/fauna. The natural landscape of Australia is a critical and unique characteristic and ingredient of the winescape and the wine tourism experiences offered in Australia. Hence, it is important that actions are taken to protect, preserve and further enhance it for future generations to experience and appreciate. Equally, it is important for wine operators and organisations to support small and family based wine tourism related business that have suffered the most due to the recent crises and are challenged to maintain their business continuity.

Technologies are also recognized as a valuable tool to support innovation, build resilience (e.g. virtualization during COVID-19), internationalization (exports, distribution channels), business models and operations as well as sustainability (Sigala, 2020; Garibaldi & Sfodera, 2020).

The Australian wine tourism industry has demonstrated so far that is resilient enough and has the dynamic capabilities to continue prosper and excel in the future.



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Wine Tourism in Serra Gaúcha (Brazil)

Rinaldo Dal Pizzol

R. Dal Pizzol Institute Curator
of Bento Gonçalves Wine Culture Ecomuseum, in Brazil

Abstract

Brazil is a country whose territory is marked by its diversity of climate, geography, soil, marine coast, colonizing ethnicities, unique landscapes and identities, which favour tourism in general. The Brazilian region of wine production, which will be the reference for wine tourism, is in the south of Rio Grande do Sul state, 100 km from Porto Alegre, the state capital, and is called Serra Gaúcha. It currently accounts for 90 % of the national wine production. This territory has been inhabited since 1875 by Italian, immigrants. Those immigrants are responsible for the Brazilian viticulture and enotourism consequently. In this chapter, we present the current situation, potential and challenges of wine tourism in Brazil.

1. Introduction

Brazilian enotourism began its consolidation in Serra Gaúcha, a region embracing five tourist destinations of the country. Among these destinations, we find wine and grape tourist routes, where the city of Bento Gonçalves is considered the second largest Gaúcho destination inducing national tourism by the Ministry of Tourism (2008/2009). Authorities' reports indicate that Serra Gaúcha is a destination that stands out for its entrepreneurship, associative and historic preservation, offering products that are a result of its lifestyle and appreciation of tradition¹.

According to the Brazilian Wine Institute (IBRAVIN, 2012) there are 1,100 wineries in the country with an average of 2 hectares of vineyards per family. These vineyards are organized into smallholdings, which grant them peculiar features for wine tourism initiatives. According to IBRAVIN, eight states are in terms of enotourism of great interest: Rio Grande do Sul, Santa Catarina, Paraná, São Paulo, Espírito Santo, Bahia and Pernambuco (Figure 1).

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¹ See: "Uva e Vinho"; <https://cultura.rs.gov.br/upload/arquivos/carga20180654/28095412-planejamento-uva-e-vinho.pdf>.



Thus, it is possible to say that Serra Gaúcha's wine-growing territory is a tremendously effective and potential market, having the same language, currency, customs and other factors as an advantage, leaving no doubt about the sustainable future of this wine tourism region.

Having so many places in Brazil for tourists to visit, such as the coast with incredible beaches, the Amazon and Pantanal mysteries, the regional festivals gigantic audiences, religious tourism and many others already consolidated, the question arises: why are people interested in visiting the wine region of Rio Grande do Sul?

Figure 1.

Map of wine production in Brazil



Source: IBRAVIN (2012).

It is known that many consumers perceive wine as a healthy, tasty agri-food product. However, it is much more than that. It is a 'cultural product' full of emotions. Wine is part of human history and it is much more and goes beyond what is in the glass. Wine significantly influences human behaviour, consumption habits, and gastronomy either in content or in harmonisations; it promotes conviviality and is an element of aggregation and friendship of social groups.



More and more, people are feeling the need to know, explore, and discover everything about wine: its history, properties, aromas, production methods, benefits and sensations. This same thought is manifested by Getz and Brown (2006; p. 155): “the wine lover who has become an enotourist wants an environment in which he not only prefers tasting wines and increasing knowledge, but also romantic dreams and cultural bonds that make him feel satisfied”.

Also, it is notable that Brazil does not have a wine culture and, therefore, realizes this need for learning about wine. As potential enotourists, the consumers can glimpse there is much more beyond the glass. They look towards the role of cultural peculiarities and typical practices in its production and its mystical environments, which are only accessible in the producing regions and where it is possible to feel, participate and live the wine culture in all its dimensions (Figure 2). Zanini and Rocha (2007) asked in their study visitors about the purposes of their trips to Vale dos Vinhedos and Vale de São Francisco wine regions. The results indicate the pleasures of food, landscapes and new forms of leisure as some of the elements that bring them to these lands.

Considering that the landscape obtained 77 % of the interest of the tourists, it is possible to say that the tourists have wine for consumption in their cities. However, they can only find wine culture and all its factors, including its lifestyle, in the producing regions.

Figure 2.

Vineyards among the woods. Serra Gaúcha (Brazil)



Source: Dal Pizzol Institute (image by Fabiano Mazzotti).



There is, of course, another obvious perception enotourist show: when they visit a wine region, many have the feeling of going back to their origins. In addition, to visiting the vineyard and contemplating its landscape, conversing with the winemaker, and living in the region of the winemaker, even in their eating habits, the tourists free themselves from the anxieties of living in the city and return home feeling fulfilled.

These are distinguishing features that make tourists choose Serra Gaúcha for their experiences especially because it is a consolidated destination for wine tourism, having wineries prepared to offer a different experience to those who visit them and facilities planned for this purpose since the 80s².

Therefore, these family wineries have a competitive advantage over other tourist attractions, including other emerging Brazilian wine regions³. It is for these factors and the wine tourism character of these entrepreneurs who retell the remote and recent history of ethnic *venetos* that the model practised in Serra Gaúcha is sustainable, and it has already gained evidence over time for some decades. All starting from a wish that has come to life.

2. Leading Personalities, Vineyard Typicity and the Landscape of Serra Gaúcha enotourism

The settlement of Serra Gaúcha occurred in 1875 when Italian immigrants arrived and received among 12 and 24 hectares of land covered with Atlantic Forest where they built their homes and began a new life with their families (Dal Pizzol and Pastor, 2016). Removing the forest and cultivating the soil with subsistence plantations were their first steps. After that, they built the first vineyards, and until not too long ago, the wine used to be made for family consumption. And thus, the Serra Gaúcha viticulture was born, combining American grape varieties and the practices they knew in their homelands. The type of vineyard they used to use was the pergola or horizontal latticework (Etruscan model), a technique used in European lands with a structure entirely in wood which has resulted in a fantastic peculiarity (Dal Pizzol and Pastor, 2016). Starting with the rudimentary knowledge, practices and wisdom they brought from Italy, these immigrants started adapting to local viticulture peculiarities, and they have been developing their techniques over the years ever since.

According to Dal Pizzol and Sousa (2014), it did not take too long for them to make too much wine beyond their own consumption needs, and consequently, for traders to emerge who bought it from producers and sold it in the markets back then. It did not take too long for the traders to buy grapes from the producers and start making their own wines since it had become more profitable to sell grapes rather than make wine.

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2 See: <https://www.valedasvinhastur.com.br/passeios>.

3 For a detailed vision of wine tourism in Brazil see Duarte and Flores (2012).



The rudimentary wooden pergola vineyard was modified after the arrival of wire, and consequently, perimeter started to be structured with living trees replacing the wooden poles. Pruned every year so as not to shade the vines, the trees have given a unique typicity to the landscape, creating a current, picturesque, and contemplative landscape (Figure 3).

Figure 3.

Typical Serra Gaúcha vineyards. Bento Gonçalves (Brazil)



Source: Dal Pizzol Institute Archives (image by Fabiano Mazzotti).

From the original vineyard area back in 1875 now reaches 39 thousand hectares in the region and covers 40 % of the Serra Gaúcha territory (Dal Pizzola and Sousa, 2014). Studies on the cultural landscape are recent in Brazil, and there is no legislation willing to change it. However, these landscapes created by the vineyards are qualified for UNESCO recognition, which requires a broad national debate to occur in the future.

For more than a century, this vineyard was dedicated to cultivating American grape varieties (Isabel, Concord, Herbemont, Guet) destined for the domestic table wine market, and in recent decades, for the production of natural grape juice, even concentrated juice, for export.

Regardless, the fine wines and sparkling wines production has grown, especially since the 1960s and 1980s, with the introduction of prevalent technologies in the international wine industry. Consequently, there was a transformation impacting the vineyards. For these wines, the grapes come from vertical systems known as espalier tutored vines (Figure 4).

**Figure 4.****Spa do Vino. Serra Gaúcha. Bento Gonçalves (Brazil)**

Source: Dal Pizzol Institute Archives.

3. Wine Tourism Evolution in Serra Gaúcha

Over time, many small grape producers became small wine producers, creating family wineries throughout the territory. From this new context, there was a massive wine supply on the regional market, which then became saturated and created a serious problem. Since then, with a spirit of initiative, local producers awakened their vocation for enotourism and began working as hosts.

Since the largest wine market is 1.000 kilometres away, in the heart of the country (São Paulo and Rio de Janeiro), and therefore, with consumers inaccessible to small producers, enotourism was a way of bringing customers to the homes of these producers. And besides buying wine, these customers have found everything they were looking for to satisfy their motivations as enotourists.

As a result, little by little, enotourism became consolidated in Serra Gaúcha, which is an expected consequence for the region since it has become the greatest wine producer in Brazil and has maintained this title ever since. In Bento Gonçalves alone, where Vale dos Vinhedos is situated, there was a tourist flow of 1,694,462 visitors in 2019, according to website bento.tur.br.



This impressive number of visits is due to Vale dos Vinhedos producers, who founded the Producers Association (APROVALE) in 1980. The association resulted in a successful enotourism project, generating not only economic development but also a sustainable model that led the group registering a D.O. (Designation of Origin), providing credibility and wide dissemination of local wines and attractions.

According to Lavandoski (2008), Vale dos Vinhedos “*is where visitors are attracted by something that goes beyond a simple materialistic consumption; they are attracted by the wine that involves feelings, knowledge, and different manifestations of a people’s culture*”.

Enotourism accounts for 70 % of small producers’ sales, which is directly done to tourists, reaffirming the importance and sustainability of enotourism that has arisen and has been expanding in this region in Brazil.

The city of Bento Gonçalves in Serra Gaúcha has a population of 120 thousand people. It is considered by the Tourism Brazilian Ministry of Tourism (2008/2009) the Brazilian Capital of Wine and has some distinctive monuments as a tourist destination. The Pipa Portico, for instance, is an enormous concrete barrel and marks the main entrance to the town as a gate (Figure 5).

The Wine Train, an old locomotive called Maria Fumaça, does a 23 kilometres journey, passing through Bento Gonçalves and its neighbouring towns, Garibaldi and Carlos Barbosa (Figure 6). The Maria Fumaça activities started in 1993, and it does eight rides per week, from Bento Gonçalves to Carlos Barbosa and back again. Every year, it transports 350,000 passengers who come from all over Brazil.

Figure 5.
Entrance portico of Bento Gonçalves



Source: Dal Pizzol Institute Archives (image by Fabiano Mazzotti).

**Figure 6.**

Maria Fumaça Locomotive on an enotourism trip to Carlos Barbosa/Garibaldi/ Bento Gonçalves



Source: Giordani Turismo

4. Innovative and Sustainable Cases/Stories of Enotourism

There is no official database in Brazil for wine tourism. However, some specific research is the only source of enotourism information in the country. The Brazilian Government has a website linked to the Ministry of Agriculture, Livestock and Supply to collect information about the grape and wine sector, but it is outdated. On the other hand, the Ministry of Tourism recognize the Grape and Wine Route as a relevant destination, but it does not promote studies into the sector.

In the Rio Grande do Sul state, the central Brazilian wine tourism destination, the University of Caxias do Sul (in Serra Gaúcha) conducted a Winery Census (2014) in partnership with the Brazilian Wine Institute. In this study, one of the factors investigated was tourism-related actions. 346 out of the 545 wineries registered in the Gaúcho Winery Records (Cadastro Vinícola Gaúcho) participated in the study, resulting in 79 % of the valid samples. Among the participating wineries, only 24.9 % informed that they do some activities related to tourism.

Since there is an absence of an integrating institution at national level, wine tourism promoters also make it difficult to carry out studies that provide information such as the visitors' profile, which establishes a fragility on this sector.



In some regions, producers have set up associations such as Aprovale (Fine Wine Producers Association of Vale dos Vinhedos), which has 22 associated wineries, and ATUASERRA - which brings together the towns included in the Grape and Wine Route. Both associations are in Serra Gaúcha. Despite this scenario, many initiatives contribute to strengthening enotourism in Brazil. Some of these initiatives are presented below.

4.1. Dal Pizzol Wine Theme Park and the Wine Culture Ecomuseum

Next to Valle dos Vinhedos, the Faria Lemos is another District in Bento Gonçalves which has been distinguished for its grapes and fine wine production. In 1974, thanks to Atilio Dal Pizzol's initiative, who founded his small family winery with his children and brothers, the author transformed his vocation as a fine grape producer into fine wine production directly intended for the final consumer.

Thus, Atilio's small winery began, of course, from its foundation, welcoming wine tourists. The success was plain to see and progressed until the 1990s, when I inaugurated, under Atilio's children management, an 8-hectare cultural space of its property for receiving tourists. It is Dal Pizzol Wine Theme Park, where we founded the Wine Culture Ecomuseum.

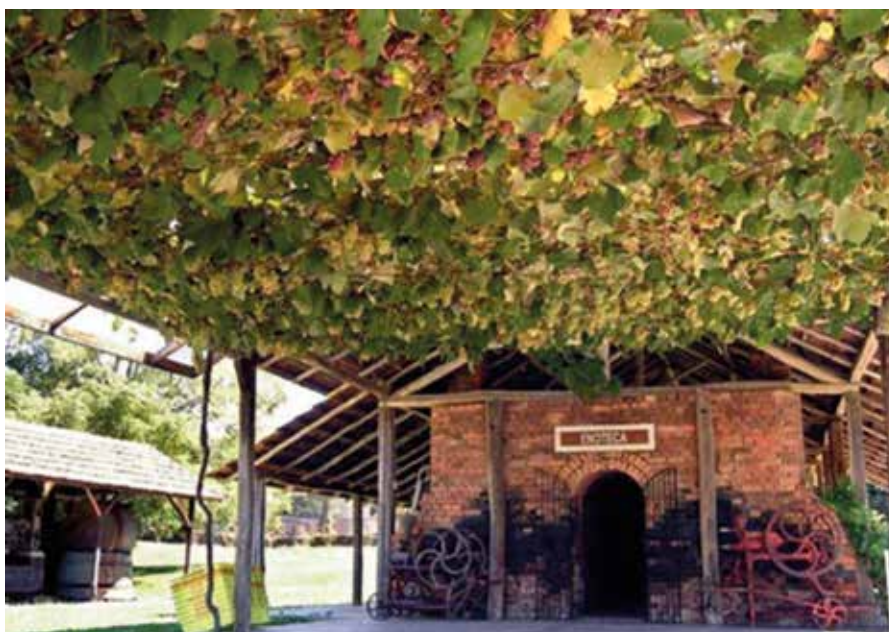
It is a space that offers tourists the full experience and sensations of wine culture. These experiences include tastings, gastronomy with a restaurant, a collection of historical family objects, and more than 300 botanical varieties – native, exotic, and ornamental plants, fruit trees, etc. –, all of them identified and catalogued. There is also an Enoteca, a wine collection with some bottles dated from the beginning of the Dal Pizzol vineyard, as well as regional and national wines and international wines from several countries (Figure 7).

There is also a small vineyard nearby with a varied collection of grapevines – more than 400 different strains from all countries of the viticultural world –. This collection is called Vinhedo do Mundo (World Vineyard). Every year, we make a unique wine with the fermentation of all the grapes of the harvest, which results in a unique, rare wine: Vinummundi. Only a few bottles of this wine are gifted to authorities and cultural events whose fundraising goes to social projects.

This small place is a new and successful model that lets tourists enjoy all the reasons that make them travel thousands of kilometres and come from all parts of Brazil and other countries searching for satisfaction and compensation. Enotourism receives 21,000 visitors per year.

**Figure 7.**

Enoteca of Dal Pizzol Wine Culture Ecomuseum



Source: Dal Pizzol Institute Archives.

4.2. Tropical Wine and Enotourism

Another attractive innovation is a project in the wine-growing zone of the semi-arid tropic between parallels 8 and 9 of north-eastern Brazil and 700 kilometres in Recife and Salvador countryside, Pernambuco and Bahia capitals, respectively. This valley is in a semi-arid region where its agriculture the waters of São Francisco River (Figure 1).

This new strip of vine cultivation was developed on the initiative of an Italian businessman initiative based in São Paulo, Franco Persico, along with a Japanese descendent farmer, Mamoru Yamamoto. They introduced vine cultivation and produced an irrigation system for their table grapes using water from the São Francisco River in the 1970s. The local weather grants two and a half harvest per year, on the same plant.

From that moment, they took winemakers and vintners from Bento Gonçalves, who began to grow the *Vitis Vinifera* and fine wine production. It was a long task that has resulted in their introduction into and development of wine tourism (Figure 8). All of this occurred on the banks of the São Francisco River, with the cities of Petrolina and Juazeiro, one on each side of the river, attracting 50,000 visitors/year⁴.

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4 For more information about wine tourism in Do Vale Do São Francisco see Da Silva and Dos Santos (2018) and Macêdo and Carvalho (2014).



Figure 8.

Terranova Vineyard and Winery. Vale do São Francisco. Casa Nova, Bahia (Brazil)



Source: Miolo Wine Group.

4.3. Enotourism that merges wine culture and the Gaúcho cattle tradition from Pampa lowlands

In the south of Serra Gaúcha, there is a new viticulture region near the Argentinian and Uruguayan borders in the south of Porto Alegre, the state capital. It is a recent project with extensive, modern, and mechanized vineyards, which combine viticulture with livestock, cattle and sheep breeding (Campanha Gaucha Region, Figure 9).

Consequently, it combines wine culture and its enogastronomy with the culture and history of cattle breeding and its folkloric and gastronomic traditions (churrasco). It is a social, economic, and cultural project with a large -scale tourist appeal that promises high impact attractions and gastronomy, and welcomes 5.000 tourists annually.

Acting from a sustainable perspective, and even though it is not certified, Guatambu Winery is the first in Latin America to be 100 % solar powered (Figure 10). The winery handles its vines with natural products aimed at the Pampa biome preservation. The landscaping has native plants of the Pampa Gaúcho; the rainwater reuse ensures the supply of fire prevention equipment, the garden maintenance in the industrial complex (with special treatment tanks), and wine tourism activities. The winery also uses solid waste (stalk and bagasse) for vineyard composting and fertilization. They are also used in cattle feeding.

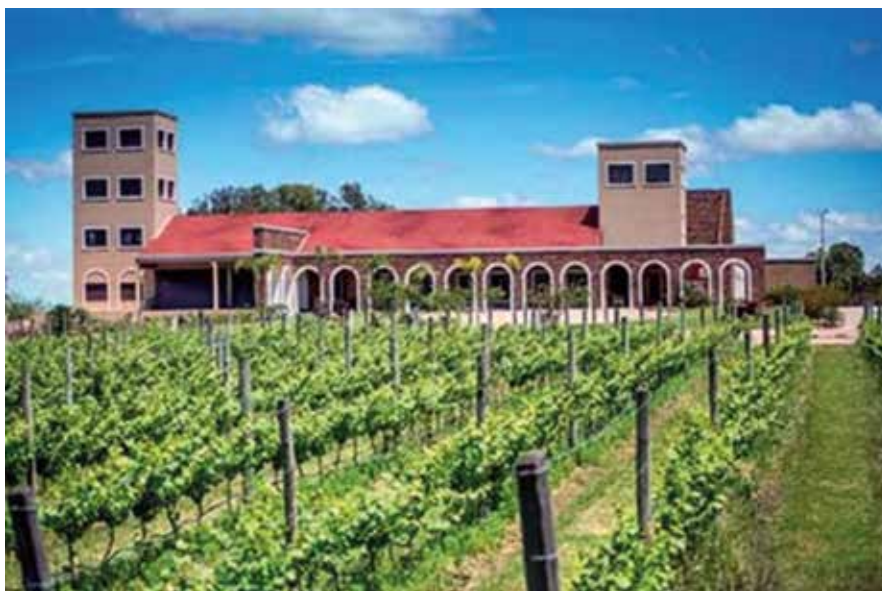


Figure 9.
Vineyard in the Campanha Gaucha region



Source: Dal Pizzol Institute.

Figure 10.
Guatambu Vineyard and Winery. Dom Pedrito. Campanha



Source: Guatambu Archives.



5. Challenges

Brazil's enotourism has a long way to go, even though the best practices are found in Serra Gaúcha, the only consolidated destination in the segment. The Serra Gaúcha wine region has become the European-like option for Brazilians who cannot or do not want to travel to the Old Continent.

The identifiable motivations of enotourists and the evolution of the number of visitors over the decades indicate the consolidation of this tourist model seen from the perspective of the demand. From the wine producer's perspective, which has also become a tourist attraction, the only viable way to be efficient is through the practice and development of enotourism.

The model sustains itself economically because, on the one hand, the producer has no possibility to compete in the great wine market in the heart of the country. On the other hand, they have no market or distribution costs because their wines and other products and services are sold at full price to the consumer, with no need to put them on the market. This system optimizes all the cost components of the operation, which sustains the enotourism model.

Considering that most journeys to these wine-producing regions and wine tourism enterprises are to attend regional markets, and are, generally by car, together with family or friends this activity will tends to be re-established with no difficulties after the COVID-19 outbreak, according to observations made by some enterprises. However, the tourist flow from Rio de Janeiro and São Paulo (which have the biggest airports in the country) will depend on biosafety measures for its return, which means a possible descent in tourism flows, the impact of which is not yet predictable.

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Wine Tourism in Chile

Gonzalo Rojas Aguilera
VINIFERA

Abstract

Wine tourism offers opportunities for local development and contributes to the conservation of environmental and cultural assets through the incorporation of landscape, historical and architectural resources. It is an economic activity which has a significant revitalizing effect on regional economies, capable of increasing the income received by winegrowers and wine companies. This chapter offers an updated panorama regarding wine tourism in Chile, with emphasis on the search for a model capable of showing the uniqueness of the country and its potential to develop sustainable wine tourism. It has been proposed that the main innovation be focused on the recovery and enhancement of wine history and heritage, geographical diversity, organic and pre-phylloxera viticulture, the cultural landscape and the quality of wine. The main statistics of the sector will be reported and analysed at the end.

1. Introduction

“Wine tourism, as a model for sustainable and inclusive economic development in certain areas, is capable of boosting the competitiveness of a territory, increasing, and improving wine production, respecting the environment and improving the living conditions of citizens. Therefore, a wine route is a tool for rural development”

Vázquez de La Torre (2010)

Since ancient times wine has been a product valued by people who, feeling attracted by its culture and history, have kept this activity alive through the centuries. Furthermore, although winegrowers have known how to evolve and adapt to changes, for example, in the growing techniques, winemaking, aging, promoting and marketing their products, it has only been during the last century that they have had to seek new opportunities to publicize their wines and attract new customers, with the current possibility of being able to do so all over the world.



In this sense, there is a certain interest to combine the tradition and values involved with wine production with the delivery of a visitor experience, for those who have shown growing attention to understand the processes of wine production in the same place it happens, giving way to the birth of the idea of wine or oenological tourism. The aforementioned is usually understood as “cultural tourism”, which is that which “arises from the interest of visitors to know and understand cultural heritage” (Elías, 2006).

This type of cultural tourism or “special interest tourism”, as the World Tourism Organization (UNWTO) calls it, is complemented by multiple activities and similar industries, such as gastronomy, visits to nature and adventure destinations, urban experiences tourism, the visit to thematic hotels and the search for new cultural, unique and authentic destinations.

In this regard, the greatest expression of this phenomenon is represented by the so-called “Cultural landscapes”, a category recognized by UNESCO to define a specific territory, where: “the work of man and nature are combined. They represent the evolution of a society and the occupation of space throughout time, under the influence of the environment and social and cultural groups” (Elias, 2006).

There are currently more than twenty of these sites around the world, recognized as “Vineyard Landscapes”, which stand out among the most visited and best-developed wine tourism destinations, such as Burgundy, Bordeaux, La Rioja or Tuscany.

Currently, traveling to wine regions is an increasingly common practice on all five continents, and Chile is no exception. Visitors who love wine, who try to discover its secrets and understand the mysteries that underlie winemaking tradition, travel to discover a wine-growing area through the tasting of its wines and the exploration of its landscapes, vineyards and wineries, discovering a world of aromas and flavours, typical of that terroir and its people (Figure 1).

Figure 1.
Ancestral vineyards of the País strain, in the Itata Valley



Source: Courtesy of Vinífera.



Although scientific literature provides differing definitions, in synthesis, Wine Tourism can be considered to be comprised of the set of tourist and recreational activities carried out in a given territory, related to wine culture and the particular characteristics of a wine destination, such as its history, identity and heritage (Elías, 2006; Lacoste and Zamora, 2007; Rojas, 2015; Fidel, 2018; Lacoste, 2019).

Thus, as the UNWTO has pointed out: “Wine tourism, as a crucial component of gastronomic tourism, has become a key element for emerging and mature tourist destinations, where tourists can experience the culture and lifestyle of destinations, while promoting the development of sustainable tourism” (UNWTO, 2016; p. 3).

For the viticulturists this type of tourism entails the possibility of generating a new source of income, complementary to the main activity, and increasing the sales of wine and the average sale price per bottle. In addition, a substantial improvement is achieved in the image of wine as a cultural product, linking it with the identity, history and heritage of its place of origin.

Likewise, wine tourism, in its more general context, represents an opportunity to enhance the so-called country-image, due to its international communication effect, generating an emotional connection between wine consumers and their country of origin. Regarding the latter, Chile has made great efforts during the last thirty years to position its image as a wine-producing country, successfully entering the select club of countries internationally recognized as producers of quality wines (Del Pozo, 2014; Lacoste, 2015; Rojas, 2015).

Considered by the UNWTO to be a model of sustainable development, due to its capacity to create employment and generate wealth in rural areas, it can also increase and improve wine production, intensifying the competitiveness of both productive and tourism activities alike, while improving the citizens' quality of life. All this through respect for the environment, fair trade practices and the option for the development of sustainable economic activities.

However, although Chile has significant potential for the development of wine tourism, there are still but a few regions whose wineries and hospitality companies (hotels, restaurants and tourism agencies), offer tourism products related to wine: Only one out of every four of the country's wineries provide themed and organized tourism activities on a regular basis, 90 % of which are located in the central region of the country, and even those are still in the early stages.

2. The Evolution of Wine Tourism in Chile

Although there is some evidence regarding the existence of tourist activities related to wine in Chile prior to the 1990s, the truth is that this activity, in a formal, organized and systematic way, began to develop in 1996 after the creation of the Colchagua Wine Route. This milestone marked the origin of wine tourism in the country, developing the first associative initiative, with public and private agents involved, which has managed to maintain itself over time, becoming the most important wine tourism offer in the country (Zamora and Barril, 2007).



Following this pioneering initiative, many have been the undertakings in this area. Currently there are the Casablanca, Curicó and Maule wine routes. All of them have followed the same associative model, which combines the characteristics of a trade association with those of a tourism operator, bringing together the offer based on the concept of the «Wine Route». This model involves the integration, in the same organization, of the tourist resources and services of interest of a determined wine-growing area in order for the destination to manage the promotion itself.

Likewise, there are other incipient initiatives, with similar associative characteristics, at various points on the Chilean wine map such as: the Huasco Valley –in the Atacama Region–; the Elqui, Limarí and Choapa valleys –in the Coquimbo Region– and the Aconcagua Valley –in the Valparaíso Region, in the north-central section of the Republic– (Figure 2).

The Maipo River Valley, located in the Metropolitan Region of Santiago, has an associative program in full development. A little further south is the “Valle del Cachapoal”, next to the city of Rancagua, in the O’Higgins Region, a historic province whose colonial origin dates back to the arrival of the first winegrowers, four centuries ago, in the context of the beginnings of the Hispanic colonization of Chile.

Emerging further south there is a phenomenon that is of great interest to the defenders of peasant or country wine, sustainability, heritage and traditions, where smallholding winegrowers, in the valleys of Maule, Itata and Bío Bío, have joined forces to defend their wine heritage, history and culture. Along these lines, a new type of wine tourism is beginning to appear in small inland cities, such as Cauquenes and San Javier or even in small country towns such as Ránquil, Portezuelo, Coelemu or Quillón, to name but a few. It is associated with “rural tourism” and the recovery and enhancement of local heritage and history, associated with smallholding, peasant-family viticulture (Del Pozo, 2014; Rojas, 2015; Lacoste, 2019).

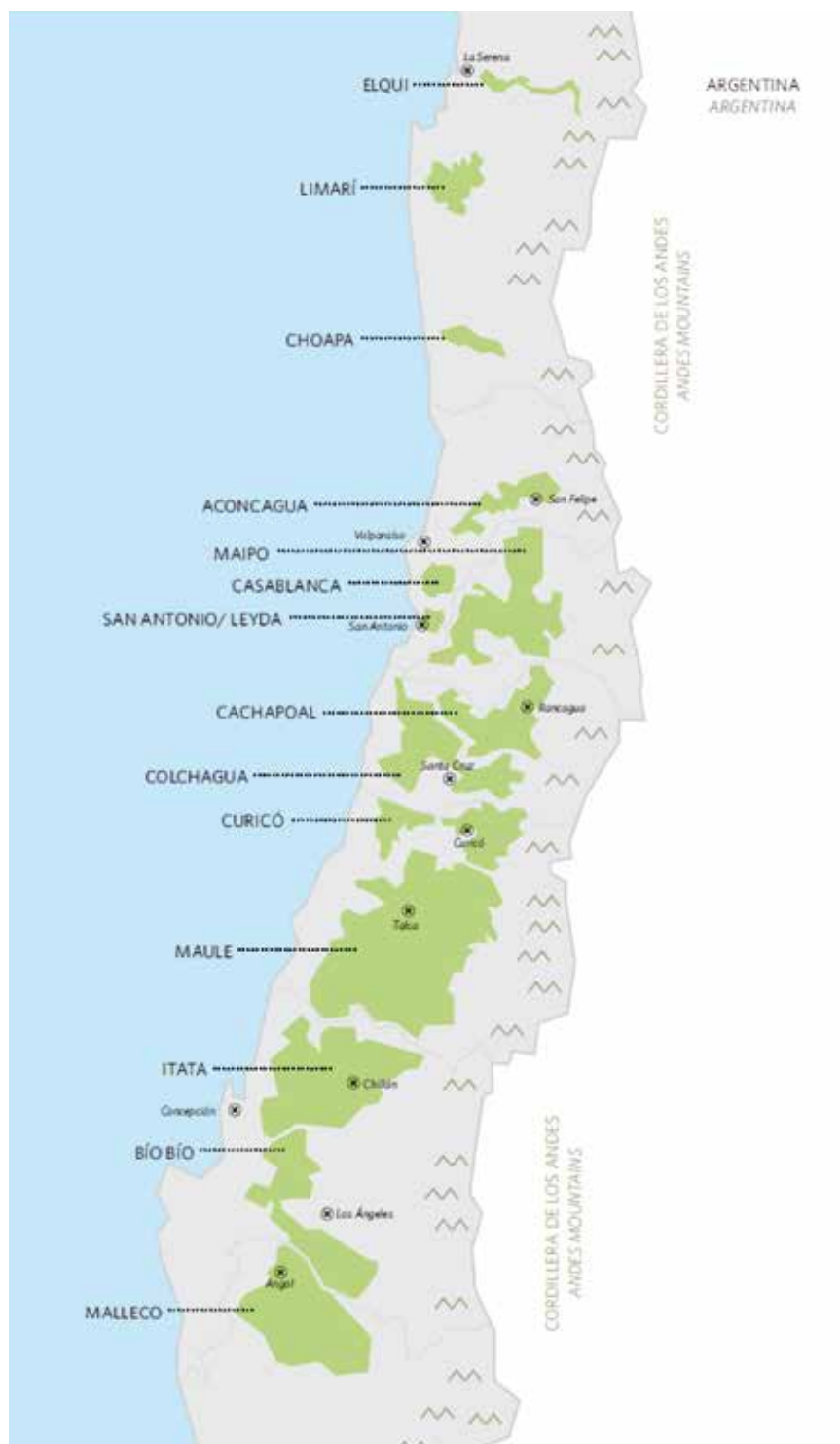
In this context, it is interesting to return to what was stated some years ago by the authors Lacoste and Zamora (2010), not only regarding the origins of wine tourism in Chile, but also regarding how symbolic and representative it is of Chilean idiosyncrasy, understood as a set of various cultural events, such as wine festivities, visits to wineries and wine routes, in line with the social, cultural and economic characteristics of the people.

This way, the celebration of wine festivities such as “Grape Harvest Festivals”, would be due to popular expression, deeply rooted in the culture and geography of the country, not so with visits to wineries, which would be understood rather as “an evolution from agro-industrial approaches, towards the occupation of industrial spaces” (Lacoste and Zamora, 2010), showing, at least in its origins, a marked oligarchic and elitist bias.

At present wine tourism as a product, is growing in diversification and sophistication. Wineries which also offer complementary services as a destination have learnt how to seek synergies for the development of new innovative, sustainable and high-added-value products, in which the search for differentiation, authenticity and diversification are the main objective.



Figure 2.
Central Chile wine map



Source: hellowine.cl.



This is how a series of innovations in wine tourism have appeared in the country, in the context of the last decade, such as “a more personalized offer, wine bars and restaurants themed with local wines, together with the incorporation of cultural landscapes, to offer the visitor a cultural experience which is more meaningful and real, connecting with local tradition and culture, in a closer, more friendly and straightforward way ”(INFYDE, 2016).

Consequently, a growing link between wine tourism, innovation and sustainability has emerged in the country, reflected, among other aspects, in the promotion of nature tourism, offering the visitor the possibility of experiencing a hiking or horseback route through the mountains, day trips to a forest reserve and ending the activity with lunch or dinner, accompanied by a selection of the best wines from the winery and the most outstanding typical products of the region.

Other options, such as the incorporation of avant-garde architecture, design, museography and interior design, 3D technology, augmented reality and Internet and global telecommunication connection services, are initiatives that are already present in some of the most important Chilean wineries, especially in those close to the capital.

Moreover, urban wine tourism, particularly in large cities, is shown to be a rapidly expanding trend. This is the way that cities such as Santiago, Casablanca, Curicó, Talca and Santa Cruz have been able to build up a growing tourist offer around wine: wine bars, wine restaurants, themed hotels and wine museums.

It is worth highlighting the consolidation of the «Wine Route» concept, set out in terms of an integrating format for the intelligent specialization of a wine-producing territory and which, amongst its main tasks, has dealt with the promotion of wine-related festivities, such as the harvest festivals, pruning celebrations, the first “Corking” and the National Wine Festival, established in 2014 thanks to the initiative of the Presidency of the Republic, commemorating the arrival of wine in Chile, on September 4, 1545.

The way wine tourism is understood has also evolved over these three decades of its development in Chile, having gone from a conceptualization fundamentally oriented towards winery visits to a more complex vision around the increasingly sustainability-related tourist experience. This includes vineyard practices and management, the link with the communities, the collaboration including the inhabitants of the territory, the enhancement of local history, heritage and identity (Figure 3), in line with the previously described international trends. Likewise, there are numerous recreational activities which stand out, such as food and wine experiences, visits to historical and archaeological sites, experiences with traditional equestrian culture and local crafts, evidencing the increasing respect and appreciation for rural lifestyles, local culture and traditions (Armesto and Gómez, 2004; Sepúlveda, 2005; Elías, 2006; Rojas, 2015; Lacoste, 2019).

Similarly, Lacoste (2019) points out that “the valorisation of wine tourism has created the conditions to reflect on the limits of the current model. The presence of the vintner’s house next to the vineyard has been noted as a factor appreciated by visitors. This ingredient has inclined the devotees of the industrial model to examine the ideological bases of that paradigm. The same happens with the visitors’ fascination for rammed-earth and stone walls; horse instead of tractor-drawn ploughing; caring for the environment through natural pest control, and fair-trade values”.



Figure 3.
Ancestral vineyards of Carmenére



Source: Courtesy of Viña Clos de Luz in the Valley of Almahue.

Figure 4.
Muscat grape harvest



Source: Courtesy of the Elqui Valley Pisquera Cooperative

This change reflects the evolution of the activity, which has gone from half-day excursions –with a limited offer of wineries open to tourism– to becoming a tourist activity in its own right. It has an increasingly better-developed complementary offer, where even community tourism has taken on a



fundamental role in the dynamic operation of tourist-related activity, and in the complementary offer of wine regions, thus promoting the economic development of these communities. Synergies are created linking visitors with the experience and these provide the possibility to learn more about local culture, with a special interest in typically authentic culinary and artisanal products.

Chile's great potential to develop sustainable wine tourism is clear, the main innovation of which should be focused on recovering and enhancing its wine history and heritage, highlighting the great comparative advantages that Chile has to offer itself to the world as a true reservoir of ancestral wine culture. With around 8,000 ha of heritage vineyards in the south of Maule, mainly with the País vines. It would be necessary to start by recognizing these winegrowing smallholders, who have kept this tradition alive, despite adversities. This is also the case with the valleys of northern Chile, mainly in Huasco, Elqui and Limarí, where farmers have kept the desert-wine tradition alive, as well as that of the distillation of Muscat grapes, to make Pisco.

In summary, Chile has attributes to show the world that it is a sustainable wine tourism destination: its historic colonial and republican tradition, geographical diversity (unique in the world) and the existence of organic and healthy viticulture, whose pre-phylloxera richness (without rootstocks or agrochemicals) make Chilean vineyards the healthiest of all wine-producing countries. The cultural landscape of wine is alive in Chile, this viticultural territory has been shaped over several centuries, forming a vast heritage to show the tourists of the world. And finally, the fact that Chile produces some of the best wines in the world. Recognized as the paradise of grapes, with excellent wind conditions, luminosity, sunlight, availability of pure, fresh water, diverse and mineral-rich soils, the country has a long oenological tradition, with prestigious schools and universities in this field.

3. Wine Tourism in figures

According to data from the Republic of Chile Ministry of Economy, Development and Tourism, there are currently 339 wine cellars and 14,086 winegrowers in the country, whose estates are on average 10.2 ha in size. Distributed around the regions of Arica to Los Lagos (Patagonia), the activity is heavily concentrated in the seven central regions of the country: Coquimbo, Valparaíso, O'Higgins, Maule, Ñuble, Bío-Bío and the Metropolitan Region of Santiago. In this context, it should be noted that, although wine tourism has been gaining strength in the country, official bodies in the matter estimate that only 30 % of the existing wine cellars in the country offer tourist activities, and only the 5 % of winegrowers participate in some type of wine tourism or rural tourism activity or association (INE, 2011; ODEPA, 2017; SST, 2019).

Nearly 8,000 companies currently provide services in the wine valleys of the country, operators and agencies, restaurants, and thematic hotels must be added to this number. Likewise, there are ventures by some winemakers, in Arica and Tarapacá, Atacama, Araucanía and Patagonia which, although still in the early stages, are in full development, supported by state funds channelled through regional governments within the framework of the public 'National Tourism Promotion' policy.

In this regard, the Ministry of Economy has estimated that the Central Region attracts about one million visitors to wineries and wine tourism destinations annually, with around 800,000 participants



in the grape harvest festivities throughout the country, over the months of March, April and May (INFYDE, 2016).

Regarding visitors to wineries and wine routes, it is estimated that 35 % involve domestic visitors, while, of the remaining 65 %, half corresponds to Brazilians, with visitors from the northern hemisphere, mainly the United States and Europe, following far behind (SST, 2019).

The income from paid visits to the wineries, hotels and souvenirs sales amounts to 50,000 million dollars and generates about 3,000 stable jobs during the year, with women doing most of the salaried work in the sector. Additionally, seasonal peaks occur in winter, due to the visits of Brazilians to the ski resorts, and in summer, when visitors from the northern hemisphere arrive in the country.

The demand for this type of service has not stopped growing during the last decade, at an interannual rate of around 20 % between the period 2005 to 2015, years for which there are reliable data, the number of visitors having tripled in the last five years (SST, 2019). However, it is estimated that this number will continue to rise, as more Chileans are motivated to visit the wineries and vineyards, as well as foreigners on a trip to the country. It is sufficient motivation for winegrowers from all over the country to feel encouraged to undertake this challenge of receiving visitors in their wineries, strongly supported by regional governments.

As far as tourist products and services are concerned, currently on offer at Chilean wineries, it is interesting to see the increase in the degree of specialization and sophistication with which a growing number have been addressing this opportunity in recent years. They have been incorporating a set of initiatives into their offer ranging from traditional horseback riding, hiking, picnics and bicycle rides to more innovative ones, such as courses and wine tasting, cooking workshops, native flora and fauna environmental interpretation tours, sporting events and alternative mass entertainment such as tours of private museums, casinos, kayaking, cable cars and zip lines.

Translated into figures, the sector currently offers more than 100 different tour alternatives that, in general, last 60 minutes at an average price of \$ 20 per person. Of this number, in addition to the alternatives in Spanish, 83 % of the wineries offer these experiences in English, 30 % in Portuguese, 20 % in French and 2 % in Italian and German; undoubtedly, another great move ahead for this dynamic sector (INFYDE, 2016).

Even with all the above, wine tourism still has many great challenges to face. The professionalization and ongoing training of human capital is undoubtedly one of them. Currently, only 45 % of workers in the sector have any type of training in tourism and, while 70 % are fluent in English only one in four guides is fluent in Portuguese (INFYDE, 2016).

Furthermore, it is important to highlight the mainly female participation in salaried employment in the sector (at 60 %), almost ten percent above the national average, represents a significant point to highlight and continue promoting, even as an efficient support policy for women heads of household.

Regarding destinations, the Maipo Valley leads the number of tourist vineyards, with 26 % of the total offer; followed by the O'Higgins Region (Valleys of Cachapoal and Colchagua), with 15 %; and the Valparaíso Region (Valleys of Aconcagua and Casablanca), with 13 %. In general figures, this central



region of the country attracts close to a million visitors to wineries and wine tourism destinations, with around 800,000 participants in the grape harvest festivities, over the months of March, April and May.

The other wine destinations in the country, which make up the remaining 46 %, are far behind. There is an average level of development in the regions of Coquimbo (Valleys of Elqui, Limarí and Choapa) and Maule (Valleys of Curicó, Maule and Cauquenes), while areas of the country, such as Arica, Tarapacá, Atacama, Itata, Bío-Bío, Araucanía and Patagonia, where smallholder viticulture is predominant, are still incipient and lagging behind most (SST, 2019). Some of these projects are supported by state funds, channelled through regional governments, within the framework of the public 'National Tourism Promotion' policy.

The most important challenge for all these destinations is that of sustainable development, for which it is hoped to receive the support of both the State and the universities. The Wine Routes, as sources of innovation, are worth a mention, although only 38 % of the vineyards are part of a route or belong to some sort of associative project. The Production Promotion Corporation or CORFO's strategic program is also noteworthy, it is called "Sustainable Wine Tourism for the Central Zone", and its objective is "to improve the competitive position of Chile, both nationally and internationally, promoting innovation in the sector, improving its levels of quality and sustainability, and providing a diversified offer, integrating a complementary tourist offer which operates differently to that of the wine industry" (INFYDE, 2016).

Other actions, currently being carried out by other central government agencies must be added to this and, of course, initiatives by regional governments to promote the development of this activity, such as the "Ruta del Pajarete", in the Atacama Region, or 'Enoturismo del Desierto' or "Wine Tourism in the Desert" in the Tarapacá Region. These projects seek to link business initiative with care for the environment on the one hand and, on the other, with the communities that inhabit the territory. These are important initiatives aimed at the diversification and consolidation of wine tourism, through the professionalization of management, service and infrastructure quality, innovation, and sustainability.

Other important challenges are promotion (domestic and international) through attractive and innovative advertising campaigns that put the country on the world map of wine tourism, the consolidation of a shared value chain amongst the various stakeholders in the sector, only 35 % of the wineries work with agencies or tour operators, and a greater understanding of the very nature of the tourism industry by winegrowers; 75 % of the wineries do not receive visitors at weekends, for example (INFYDE, 2016).

This way competitive development will improve, not only of Chilean wine but also of other associated industries, such as gastronomy, real estate, services, transportation, and telecommunications. All this will contribute significantly to improving the quality of life of the thousands of winegrowers in the country, as well as the hundreds of small and medium-sized wineries, located in rural and potentially tourist areas, using a model for sustainable tourism, linked to the identity of the territories, their historical and cultural heritage, as a source of prosperity for the lives of the people involved in wine production.



4. Conclusions

In recent years in the country there has been growing interest to combine winemaking tradition and the development of wine tourism. This type of “special interest tourism” can generate synergies with multiple similar activities and industries such as gastronomy, nature and adventure destination trips, urban experience tourism, visits to themed hotels and the search for new cultural, unique, and ‘real’ destinations.

Wine tourism offers opportunities for the local development of wine-producing territories, such as contributing to the conservation of environmental and cultural assets, as well as the incorporation of landscape, historical and architectural resources since, in turn, it enables winegrowers and wine companies alike to significantly increase their income.

Following the creation of the “Colchagua Wine Route” in 1996, there have been numerous similar undertakings. Currently, there are also the Casablanca, Curicó and Maule routes, which have followed the same public-private partnership model.

Moreover, product diversification and sophistication are on the rise. Wineries, which also have a complementary offer, are seeking synergies for the development of new innovative, sustainable products with greater added value. The search for differentiation and authenticity is the main objective. However, in this context, the following question should be asked: What is special about Chile? What is unique about it in the global context of wine destinations? After what is examined in this chapter, it is clear that the country has great potential to develop sustainable wine tourism, based on innovations focused on the recovery and enhancement of attributes such as the history and centennial wine heritage, geographical diversity, organic viticulture and the pre-phyloxera genetic wealth of the vineyards, the cultural landscape and, finally, the high quality of its wines, based on this long oenological tradition.

To take advantage of these opportunities, the sector needs to improve both domestic and international communication, the consolidation of a wine tourism value chain and a greater understanding of the very nature of the sector by winegrowers, companies and the State itself, through strategic alliances both for the development of the supply as well as the demand. But, fundamentally, emphasis should be placed on projects that connect business development, on the one hand, and, on the other, with care for the environment and the link with the communities that inhabit the territory.

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China, the Unknown Giant of Wine Tourism

Lluís Tolosa

Escuela de Enoturismo de Cataluña (Spain)

Abstract

China's wine tourism development drive is impressive. Possibly the most ambitious in the world, for many as unknown as almost everything that happens in China. It is already the country with the second largest vineyard area in the world, after Spain, but it is likely that as we write these lines it already has the largest vineyard area on the planet.

It is true that it still has a limited proportion of grapes destined for winemaking, but its investments are being made two decades ahead, thinking about its 1.4 billion inhabitants and two major trends. On the one hand, the multiplication of domestic wine consumption. And, on the other hand, the most prominent trend in contemporary Chinese society, the exponential increase in leisure travel.

China is already the largest inland tourism market in the world, and they consider it a strategic sector in the face of the global financial crisis for which they have been preparing for years. They predict that domestic tourism will be one of its sectors least affected by the crisis, with sustained growth and continuing contributions to the Chinese economy.

1. Introduction

My first trip to China in 2007 was an invitation from Edouard Cointreau, president of the Gourmand World Awards, the most important awards in the world dedicated to books on wine and gastronomy. Beijing, which we used to call Peking, was the host city for the 2007 World Finals at a time when China wanted to be the world's printing company. The awards ceremony was spectacular, and I was fortunate that my book *Vinos y Bodegas de Rioja* won the Best European Wine Book in the Global awards. I thought that both the World award and my Chinese experience would remain just that, two exceptional events.



However, in 2014, my book: Extraordinary Wines. The 100 Best Spanish Wines of all time was again proclaimed a world finalist. Seven years later, after a gala in London and five world finals in Paris, coincidentally, the world final of the Gourmand awards was to be held again in Beijing. And surprisingly I won the global award again, Best European Wine Book in the World 2014. China brought me luck again. But this time the trip was quite different. The country was well known to me, I felt very at ease, I encountered a tourism sector that spoke much more English, and Chinese wines seemed to me of a much higher quality than those I had tasted seven years earlier.

I promised to return. It was in 2015, the following year, when I went to Yantai for the first time, the main wine-growing area in China, also thanks to the Gourmand awards. I settled into a modest apartment at Yantai Wine Bay, adjusted to getting up like many Chinese at 5:30 a.m. and joined them on their long morning walks, exercising on the promenade before starting the working day.

And in addition to tasting Chinese wines, my visits to Chinese wineries began. I visited Changyu, the largest and oldest winery in China, founded in 1892. I understood the short-sightedness of our Eurocentric gaze believing that the tradition of wine is only European, and we simplify it by saying that China copies everything. There I was in a winery as old as our great centennial wineries.

I was later able to visit the three major wine growing areas around Yantai: Penglai, Pula and Taila. Since then I have been going every year. I have been going to Yantai for four years in a row now, following the development of these three wine regions and their great wine tourism projects. I have even been able to visit the Changyu Wine City construction site, one of the largest wine tourism projects in the world, on two occasions.

2. Shangdong, China's Largest Wine Producer

Shandong is the second most populous province in China. It is located at a strategic point on the northeast coast of mainland China, equidistant from Beijing, Shanghai and Seoul, off the Korean peninsula (Figure 1). Its most developed area is the Shandong Peninsula, which extends 275 km into the Yellow Sea, known for the colour of its waters loaded with sandy particles from the Yellow River, before opening up to the great blue waters of the Pacific Ocean.

It is one of the richest provinces in China. The first Chinese producer of gold and diamonds, it also has one of the major oil fields in China. It is a sizeable industrial centre with large companies of well-known Chinese brands, with a significant economic development favoured by big investments from South Korea and Japan, due to their geographical proximity. It is also a great salt-producing province and one of the largest agricultural areas in China, producing cereals, especially wheat and corn, also fruit, including a variety of apples known throughout China.

The Shandong Peninsula is also the largest wine producer in China. Its three main centres are powerful port cities. Qingdao concentrates the largest industrial activity and some winery. Penglai is the large agricultural area, with its great vineyards and considerable development of new wineries. Yantai is the historical capital of wine, where Changyu (1892), the largest and oldest winery in China is to be found.



Figure 1.
Map of China showing Shandong province



Source: Magazine *Wine in China*.

3. Yantai, Historical Wine Capital

Yantai is the most Mediterranean city in China, due to the climate, its lifestyle, and the great role of the sea. Its large port for international trade was opened in 1861, and seventeen countries established embassies there.

Today it has become a great Mediterranean-style tourist destination for the megalopolises of Beijing, Shanghai and Seoul, all three just over an hour's flight away. The Yantai Wine Bay offers great beaches, a promenade with four- and five-star hotels and a Mediterranean lifestyle, quiet, without traffic and with much less pollution than in the rest of the country.

Yantai is also the gastronomic capital of Shandong, where you can enjoy one of the four pillars of Chinese food, with vegetables, fruit and seafood taking the lead role. It is one of the most traditional cuisines in China, influenced by imperial cuisine and Beijing cuisine, with hardly any spice, lighter, very wholesome, and very Mediterranean in style.

For some, Yantai, a district of about seven million inhabitants, is the most charming city in the country. It is home to large companies such as the automobile company General Motors, the centre of attraction for many technology companies as well as coordinating a powerful mining industry which extracts more than a hundred tons of gold a year.



Yantai is also the historical wine capital of China, the centennial seat of Changyu (1892), the largest and oldest winery in China. A powerful industry is developing around wine. Although the country has more than thirty winegrowing areas, Yantai accounts for a third of the total wine production in China, more than 50 % of sales revenue and 67 % of the sector's profits.

With development of the Chinese wine sector in full swing, Yantai is also the major importation port for bulk wine. 82 % of the bulk wine that enters China each year does so through Shandong province, of which 96 % does so through the port of Yantai (World Bulk Wine Exhibition, 2019). Bulk wine arrives in China in massive quantities, especially from Australia, lately also from Chile and to a lesser extent from Spain. While their new vineyards reach maturity, it is these bulk wines that on many occasions give body to much of today's Chinese wine.

I have been told on occasion that Chinese wine is wine considered to contain at least 51 % Chinese wine. If that is the official margin, it is not difficult to imagine what is reality like. A Portuguese distributor even told me that he estimates that 70 % of the foreign wine circulating in China is counterfeit. He verified this when thousands of bottles of the Portuguese brand that he had been introducing in China for years were falsified.

Wine tourism is also developing rapidly in Yantai. Tianma Royal City is the great urban, real estate and wine tourism project that is part of the Yantai Economic & Technological Development Area, known as The Grape Hometown by the sea. It is an impressive integral development: 10,000 m² of detached houses with gardens, a dozen high-rise apartments blocks, hundreds of commercial premises, dozens of restaurants and numerous tourist services.

It strategically connects the centennial Château Changyu Castel with the Golden Beach, creating the impressive Yantai Wine Bay. On the promenade there is a large water park and the Tianma Pier, a large offshoot of the promenade that goes 700 metres into the sea, where hundreds of people do sport every morning and where couples and families walk, with spectacular night lighting over the sea. This is where I have been staying for four years, sometimes in a modest apartment on the 27th floor of one of those great skyscrapers and lately at the Hilton Yantai Golden Coast hotel, with a magnificent aerial view over all this urban development, with the great vineyards of Changyu on one side, the vastness of the Pacific Ocean on the other, and the silhouettes of other majestic luxury hotels like the Marriott and the Sheraton.

In the centre of the Tiamma Royal City is the Yantai Wine Bay Club, a wine bar that functions as a cultural centre for wine and gastronomy, promoted by Edouard Cointreau, president of the Gourmand World Awards, where I have been able to taste quite a few Chinese wines and give a tasting of Spanish wines. Perhaps the most important presentation was when Mr. Wang, the great promoter of the Tiamma Royal City, asked me for a private tasting for his friends. In China everything has another dimension and from one day to the next we had to organize a gala tasting for a hundred people in the Tiamma gardens, in Spanish, English and Chinese, which of course ended in a great dance.



4. Changyu, the Largest and Oldest Chinese Winery

Changyu, the largest and oldest winery in China, was founded in 1892. In 1987, thanks to Changyu, Yantai was recognized as an International City of Vine and Wine by the International Office of Vine and Wine (OIV), an appointment which has been reinforced since 2007 with the annual celebration of the Yantai International Wine Festival.

Its main attraction is the impressive Château Changyu Castel of Versailles-style architecture (Figure 2). It was opened for public visits in 2002, creating a large wine tourism centre that includes the century-old winery, its large European-style gardens and 140 ha of farm with 135 ha of vineyard, where all kinds of visitors, couples, groups of friends and families go to walk every day. In 2002, they commemorated their 110th anniversary with the inauguration of the Changyu Wine Culture Museum, located in the first original building of the winery, where they show their centuries-old history. In 2007 they opened a second floor with the China International Wine Museum to celebrate the 20th anniversary of its international recognition and created the 2nd Floor - OIV Hall.

Figure 2.

Changyu, the largest and oldest winery in China (1892)



Source: Lluís Tolosa.

Although it is difficult to get official data, it is highly likely that it is one of the most visited wineries in the world. It even boasts a significant flow of school visits, very often schools from rural areas, so that, as the only Westerner in the area, you become an exotic element and you can end up surrounded by dozens of children who point out to you because of your appearance, want to touch you, they call other children and they take hundreds of pictures of you, laughing in surprise.

Since then, Changyu has continued to develop this tourism concept and currently already has eight more 'châteaux' in China and five châteaux in France, as well as wineries incorporated into the group in Spain, Chile and Australia. In many countries it is a totally unknown brand, but Changyu is the fourth largest wine brand in the world (*The Drinks Business*, 2017).



5. Changyu Wine City

Changyu's biggest commitment to date is the construction of its spectacular Changyu Wine City (Figure 3) on an estate of more than 400 ha, also in Yantai. A new winery is being built to produce 400 million bottles per year, a higher figure, as a reference, to the 360 million bottles per year of the 600 wineries in Rioja (Spain).

Figure 3.
Changyu Wine City



Source: Changyu Pioneer Wine Company.

For another reference, the construction budget for this gigantic wine tourism complex is around 1 billion euros, much more than the 80 million euros that the ambitious 'Cité du Vin' (Bordeaux) cost.

I have been able to get special passes to visit the works twice and one has the feeling of arriving at a large airport. In fact, I had to do the visit by taxi, and it took more than two hours. Around the new Changyu winery they are also building two large 'châteaux' to house different hotels and restaurants, along with a large convention centre, a vine and wine research institute, a vine growing demonstration park and, most surprisingly, a replica of a medieval European city to provide a European experience to the Chinese visitor. There is already a huge production area in operation, fully robotized and of colossal dimensions, where they were installing a monorail track so that visitors can tour all the facilities in a kind of little train. The forecast is that they will open to the public for wine tourism in 2021.



6. Penglai, the Great Chinese Vineyard

Chateau Changyu Castel marked the beginning of a stage of development of the wine industry oriented to wine tourism, not only with the construction of its own eight 'châteaux' and its new Changyu Wine City, but also as a development model to be followed by other wineries, other districts and other investors.

In the last four years we have been able to see how dozens of 'châteaux' have been built in districts and cities such as Penglai, Zhaoyuan, Qixia, Longkou and Laishan, all of them within a strategic radius of under 100 km from Yantai. They have taken advantage of the fact that Yantai is located at 37° latitude, the same as Spain and California, in the ideal Mediterranean strip for growing vines. At present it seems that there are about 150 operating warehouses in Yantai or under construction, which represents a large part of China's estimated 400 warehouses, although official data is always hard to get.

Penglai, 90 km north of Yantai, is the area with the highest development of vineyards and new wineries. Every year for the last four years, I have seen new châteaux under construction, in total more than fifty 'châteaux' managed by Chinese wineries, by large foreign wineries, especially French ones, and in many cases by joint ventures. That is why the common language in the Chinese tourist circle is English, but when we hire guides to visit wineries many times the natural language is French. It has a lot to do with the hundreds of châteaux in Bordeaux that have been discreetly acquired with Chinese capital in recent years (El País Semanal, March 31, 2017).

Strategically it allows a whole generation of young Chinese to study oenology in Bordeaux and train in their own châteaux in the area. It also explains the numerous French professionals we have encountered in the Yantai wineries. China has created a veritable air shuttle service between Yantai and Bordeaux, with its characteristic ability to combine discretion with great geostrategic planning.

Spectacular wineries, totally geared towards wine tourism, are being built in Penglai. Penglai Grape and Wine Bureau is responsible for attracting investors for the wine and wine tourism industry, always under state management. One of the first to arrive was the billionaire Chris Ruffle who after three decades in the metal trade in Beijing, in investment funds in Shanghai and in other businesses in China, established the Treaty Port Winery by building his own Scottish castle in Penglai in 2004.

The key was the arrival in 2007 of COFCO Great Wall Wine, the wine branch of the Chinese food giant, one of the most powerful in the world, with multi-million dollar businesses and financial resources of more than 10 billion dollars from the Chinese State for the acquisition of companies for the distribution of grain and meat in the five continents. They set up Château Junding (Figure 4) in the purest architectural style of a Californian mission, together with Shandong Longhua Investment, with an investment of almost 50 million dollars, opening a new era for the development of 'châteaux' in the region. The winery has 8,000 m² and 400 hectares of vineyards, forests and wetlands around a huge lake, with high-end wines and a broad wine tourism offer that includes a golf course and a large resort hotel.



Figure 4.
Château Junding



Source: The winery itself.

The historic and prestigious Château Lafite Rothschild (Bordeaux, 1868) landed in 2009. The implementation process has taken a long time starting when the first vineyards were planted in 2011, they then built their Domaine de Long Dai winery and carried out production tests until their first vintage was presented in 2019.

And so on, up to fifty warehouses either in operation or under construction. In European terms, Penglai is practically the creation of an appellation of origin. In Spain, a wine route is understood as an association or product club to structure the wine tourism offer of existing wineries. In Penglai, the route is where the roads are going to be laid to create a new area of 18 km in length and 10,000 ha of new vineyards, looking for the best itinerary and the best viewpoints over dozens of new wineries.

7. Pula Valley, Wine Tourism for Millionaires

Another of the great projects of the new Chinese wine tourism is Pula Valley, in the Laishan district, just over an hour from Yantai. It is the most elite project in China, conceived for billionaires who want to have their own winery.

In Pula an investment of 9,000 million yuan, about 1,200 million euros, has been estimated to create a large 22,000-hectare wine-growing development that is already in an advanced phase of construction and operation. It is often presented as the Chinese version of Napa Valley (California), positioning it as the largest wine tourism project in the world.

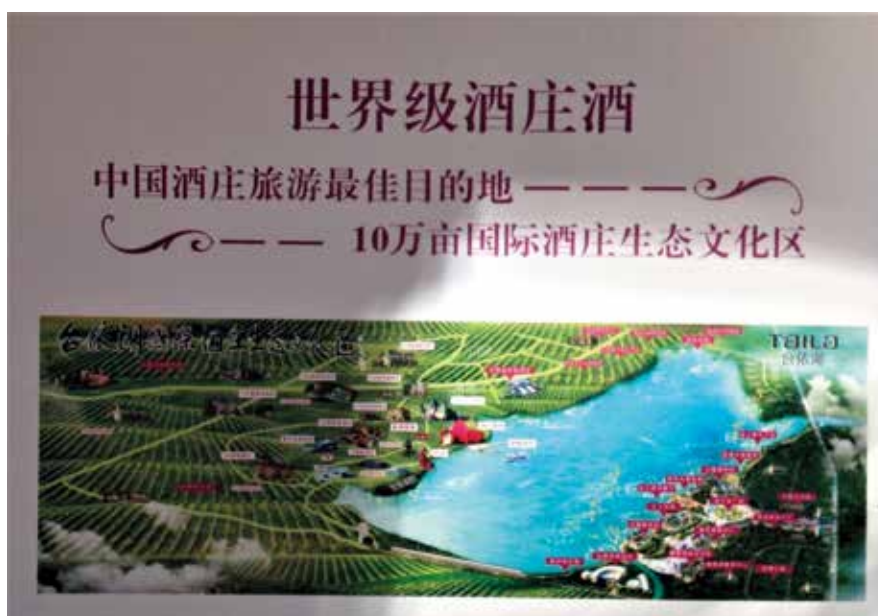


It is owned by the Chinese pharmaceutical company Luye, dedicated to the international development, production, marketing and sale of pharmaceutical products, including the great ginseng business, as well as other investments, operating in more than eighty countries, with stratospheric profits. Its president told my good friend Edouard Cointreau that they plan to invest for another ten years before they start making money.

8. Taila

Taila is already a great success story, much more consolidated. It started as a 2,200-ha project around a large lake (Figure 5).

Figure 5.
wine and real estate development



Source: Taila Winery.

There we met Gerard Colin in 2016, one of the best-known winemakers in Saint-Émilion (Bordeaux), a pioneer in the production of quality Chinese wines. He died suddenly in 2018, at the age of 75, after a long tour of the country as a consultant and responsible for the establishment of the Château Lafite Rothschild castle in China. He also planted his own vineyards and in his later years he was extremely focused on winemaking and promoting Taila. In fact, he was the image of Taila, with his face on the bottle labels (Figure 6), on the large billboards on the highways, and on the sides of the Hummer limousines that visit Taila's vineyards.



In Taila Gerard Colin produced a viognier which is considered the best white wine in China. It is sold through an exclusive wine club system, without sale to the public, or distribution to restaurants, or specialized stores. The success of its wines attracted new investors, and in 2018 an expansion from 2,200 ha to more than 10,000 ha, with a planned investment of 1,500 million euros, was confirmed by Gerard Colin himself.

Figure 6.

Gerard Colin the image of Taila wines



Source: Author's archive.

Taila's business model is not so focused on attracting many wineries, but rather on a real estate project for the sale and rental of houses and 'châteaux' among vineyards, with different luxury hotels, restaurants and other tourist services. Gerard Colin managed the collective vineyard and ran a central winery that makes custom wines for owners and investors. In Taila, the rows of small cells in the winery itself are characteristic, where each family that owns them keeps their bottles under lock and key, with the family photo and name shining on the cell and their personalized bottles with exclusive family labels. It is a place where they take their friends, family and clients as if the winery were their property, and all the owners of the complex do so naturally and with pride.



9. Conclusions and Sustainability

China's economic growth in recent decades has been the most outstanding in the world in terms of pace and scale. But the Chinese economy has grown based on industrialization, with a huge cost in terms of energy which comes mainly from coal.

China is the largest emitter of carbon dioxide on the planet, almost double that of the second, the United States, because almost 70 % of Chinese energy comes from coal. Respiratory diseases are already among the leading causes of death among Chinese, many rivers are highly polluted, and many Chinese towns and cities suffer from water quality problems and shortages.

China's great challenge at the moment is to find the balance between its sustained economic development, greater social equality and minimal environmental impact. And in recent years they are taking serious steps to curb pollution and accelerate the transition to clean energy. In 2007, China published its first National Plan to face climate change, although it made it clear that concern for the environment should not have an impact on economic development (Anguiano de Miguel, 2016). Some continue to denounce China's low transparency on this matter, but others say that China could soon become the world leader in sustainability and play the leading role in the greatest ecological revolution in history.

Yantai is no exception to this trend. The wine and wine tourism projects that are being developed on its outskirts are of dimensions and investments that are absolutely unknown in other countries of the world. And they continue to rely on their huge concrete-eating construction sector, generating air pollution and abuse of water resources, in addition to the use of chemicals in agricultural and wine-growing development areas.

In environmental aspects its challenges are not vastly different from other sectors undergoing great development. The few Westerners who come to visit these areas are more concerned about the sustainability of the foreign wine market in China. Some fear that the rapid proliferation of Chinese wines will wipe out the juicy Chinese market. But that may not be a great risk. During the next few years, it is very likely that China will continue to import bulk wines en masse and that the consumption of foreign wines, especially the French ones from Bordeaux, will continue to be very deep-rooted in the Chinese upper classes.

In terms of wine tourism, it will not enter competition with other wine tourism destinations in the world, because all these developments, at the moment, are totally oriented towards the domestic tourism market. China is already the largest inland tourism market in the world, and they consider it a strategic sector in the face of the global financial crisis, for which they have been preparing for years. They foresee that domestic tourism will be one of the sectors least affected by the crisis, with sustained growth and continued contributions to the Chinese economy (Zhang Qiu, Yuan, Haobin Ye, Hung, 2013).



With wine tourism they achieve several objectives: With the wineries they promote the construction sector and with the planting of vineyards they generate local agricultural development, then they open the restaurants the wine tourism business gives and thus give a decade of development margin to the wine business.

Edouard Cointreau, president of the Gourmand World Awards, based between Paris and Yantai, has the theory that the main challenge is the cultural challenge that all this poses for the rest of the world, especially for old Europe. Until now, the dominant concepts in the world of wine were European cultural concepts, mainly from France and to a lesser extent from Italy and Spain. The Yantai megaprojects will create a new Chinese wine culture in terms of production, consumption, investment and local development. For many new Chinese and Asian consumers Yantai will soon be their main reference in wine culture.

In one or two decades, a whole generation of Chinese and Asians will no longer see wine as a European historical and cultural product, but as one of contemporary China. Now they are focused on that internal strategic planning, but we can already imagine that in the next two decades they will project the expansion of their wine culture to the whole world, shaking each and every one of the international indicators of the wine and wine tourism sector as we know them today.

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Geographical Indication as a Tool for the Development of Regional Wine Brands and Wine Tourism in Japan

Toru Kodama

Ryutsu Keizai University (Japan)

Abstract

Wine tourism is booming in a growing number of wine-producing regions around the world. In Japan, many wine enthusiasts now visit wineries in such places as Yamanashi, Nagano, Hokkaido, and Yamagata. Also, an increasing number of wine festivals have been held in those areas. The promotion of wine tourism has now been regarded by local municipalities in wine-producing areas as an essential policy target to develop wine clusters and boost local economy. This upward trend of wine tourism in Japan has occurred in parallel with the growing popularity of Japan Wine. This wine is legally defined as wine made exclusively from grapes grown in Japan. Japan Wine is now recognized as the most important growth driver for the wine industry and wine tourism in Japan. In terms of Japan's wine tourism growing further, it is of crucial importance for local wine clusters engaging in the production of this wine to strengthen their regional wine brands to attract consumers to visit their places. This chapter analyzes the potentiality of and challenges for utilizing GIs (Geographical Indications) as a marketing tool for the growth of local wine clusters and wine tourism in Japan.

1. Introduction

In Japan, annual alcohol consumption per capita has consecutively shrunk over the decades. However, wine consumption in the country has steadily increased in recent years. In fact, wine is becoming one of the major alcoholic beverages consumed by Japanese people. One of the key factors behind the current wine boom in Japan is the growing popularity of so-called Japan Wine, which is legally defined as wine made 100 % from grapes grown in Japan (see Section 2 below). As of 2018, while 66.5 % of the domestic wine market in Japan was accounted for by wines imported from foreign countries and 28.9 % of it was accounted for by wines bottled in Japan using imported juice, Japan Wine accounted for only 4.6 % of the market, but its shipment has been on the increase in recent years (NTA, 2020).



Japan Wine has now been widely recognized as the most important driving force for the growth of the Japanese wine industry.

In line with the growing popularity of Japan Wine, the number of wineries in Japan has constantly increased from 261 in 2016 to 312 in 2019. By regions, as of 2018, Yamanashi, which has the largest Japan Wine production share of 31.2 %, is ranked first in terms of the number of wineries, with 85 wineries in the region (NTA, 2020). Yamanashi is followed by Nagano, which has the second largest Japan Wine production share of 23.8 % and 38 wineries in its territory; Hokkaido, which has the third largest Japan Wine production share of 15.7 % and 37 wineries in its territory; and Yamagata, which has the fourth largest Japan Wine production share of 7 % and 15 wineries in its territory (NTA, 2020).

At the same time, wine tourism has gradually taken root in major winemaking regions such as those mentioned above. There is still no overall statistical data to show the number of tourists who participated in wine tourism in those regions, but a growing number of local wine festivals and wine-related events have been held in those regions, some of which have attracted many people from all over Japan. For example, Yamanashi Wine Tourism, which is a wine festival held in Yamanashi, attracts 2,500 people in Spring and Autumn every year. Shiojiri Winery Festival, which is held in the Kikyogahara area of Nagano in Spring every year, attracts more than 5,400 people from around the country. Yamagata Wine Bar, which is a wine festival held in Yamagata in spring every year, attracts 3,500 people, while Ikeda-Cho Wine Matsuri, which is a wine festival held in the Tokachi area of Hokkaido for only one day in Autumn, attracts more than 4,000 people. These festivals have functioned as a gateway to the tastes of local wines, diverse terroir in vineyards, and wine tourism routes in the respective regions.

One of the most important keys for local wine clusters in Japan to grow further and facilitate wine tourism in their territories is to expand regional brand values of their wines. In this regard, increasing attention has been paid to the use of Geographical Indication (GI) as a strategy tool for regional wine brands. GI can also function as a marketing tool for wine tourism promotion. At the same time, there are challenges that must be overcome for wine GIs to be fully utilized for this purpose. In this chapter, while being based on my own research, an analysis will be conducted as to the potentiality of and five particular challenges for utilizing GIs (geographical indications) as a marketing tool for the growth of local wine clusters and wine tourism in Japan.

2. GI Wines as a Flagship of Japan Wine

In Japan, under Japan's Liquor Industry Association Act, the Director-General of National Tax Agency (NTA) has the authority to designate the name of a region as a GI for liquor, including wine, sake and shochu (Japanese distilled spirits). An application for GI designation may be submitted to NTA by a group of producers of the alcoholic product identified by the GI. The producers may be organized as an entity, such as a cooperative or association and are obliged to ensure that the GI-denominated alcoholic product fulfils the product specification which all the producers in the GI-denominated region have agreed upon. GI protection for alcoholic beverages may also be requested by the NTA itself.

After receiving an application for GI designation, the NTA will scrutinize it and initiate a national objection procedure, allowing for a reasonable period within which any person having a legitimate interest may



lodge their objection to the GI designation. If all the requirements specified in the Guidelines for GI Designation regarding Alcoholic Beverages (see below) are met and no objection is raised, the NTA takes a favourable decision and the name of the region is designated by the Director-General of the NTA as a GI for the prescribed alcoholic beverage. the NTA plays a vital role in policing the market and ensuring the protection of the designated GIs. Government support is also expected for the advertisement and promotion of GI-denominated products on the domestic and global markets.

The Guidelines for GI Designation regarding Alcoholic Beverages published by the NTA in 2015 specify the requirements for the designation of the name of a region as a GI for wine. Table 1 shows several primary requirements in this regard.

Table 1.
Primary requirements for wine GI designation

1. The wine to be labelled with the concerned GI (hereinafter called the "GI wine") must be Japan wine.
2. At least 85 % of the grapes used to make the GI wine come exclusively from the region designated by the GI.
3. The oenological process for the GI wine must occur in that region.
4. If the GI wine is to be stored in the process of its production, its storage must occur in that region.
5. The grape variety or varieties used for the making of the GI wine as well as appropriate sugar content levels regarding the varieties must be prescribed.
6. Alcoholic strength, total acidity and volatile acidity of the GI wine must be prescribed.
7. The GI wine must possess a specific quality, reputation or other characteristic that is a result of or linked to natural and human factors of that region. The concerned quality, reputation or other characteristic and its linkage to those factors must be prescribed.
8. The group of local winemakers in that region applying for the GI designation (hereinafter called the "applicant group") must draft the GI wine's specification reflecting on all the requirements mentioned in the GI guidelines, including those mentioned above. The applicant Group must gain the approval of the specification from all the wine producers in that region.
9. A local organization that oversees the conformity of the GI wine to the prescribed specification must be established and managed by local wineries in that region.

Source: NTA's Guidelines for GI Designation regarding Alcoholic Beverages.

Under the above-mentioned scheme, two winemaking regions have so far been designated as a GI for wine: Yamanashi (registered in 2013) and Hokkaido (registered in 2018). Figure 1 shows the locations of those two GI-denominated regions and two other major wine-producing regions, namely Nagano and Yamagata, in Japan.

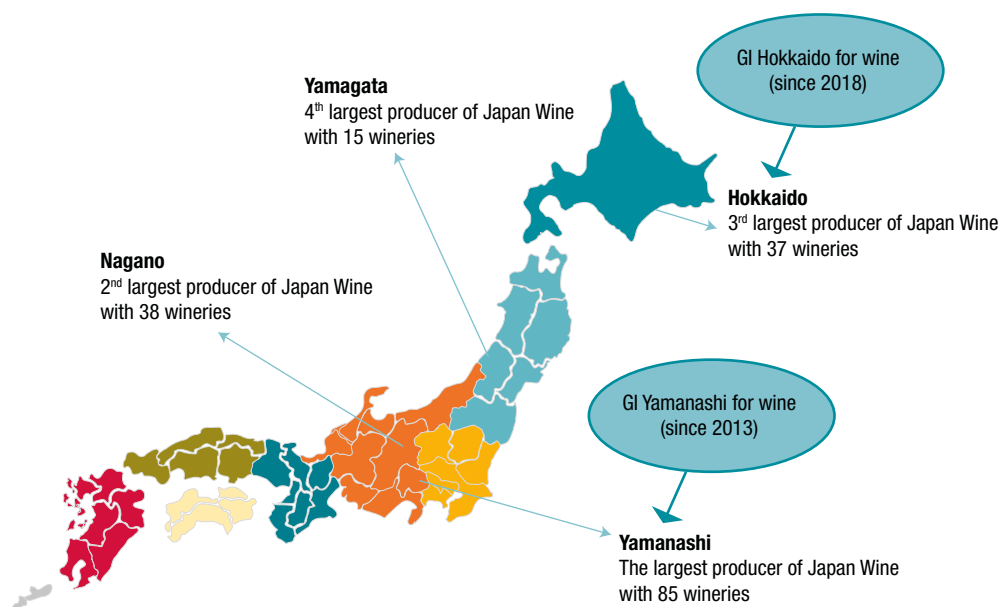
As can be seen in Table 1, one of the requirements for Wine GI designation in Japan is that the GI wine must be Japan Wine. This means that GI wines are a special type of Japan Wine. Also, GI wines are expected to function as a flagship of Japan Wine and as an ambassador for the terroir of Japan's wine-producing clusters.

Japan Wine is wine made exclusively from grapes grown in Japan. This definition can be found in the wine labelling rule legislated by the NTA in 2015. The rule took effect in 2018. Under the rule, Japan Wine must be labelled as Japan Wine, while the wines that do not fall within this definition cannot be labelled as Japan Wine. Together with the Japan Wine label, which signifies the fact that the wine is made exclusively from grapes grown in Japan, Japan Wine can also be labelled with the



information on the place of production, the grape variety or varieties used, and/or the harvest year, when the 85 % standard mentioned in Table 2 is met. Only Japan Wine can be labelled with these pieces of additional information.

Figure 1.
Four major wine-producing regions of Japan



Source: Author.

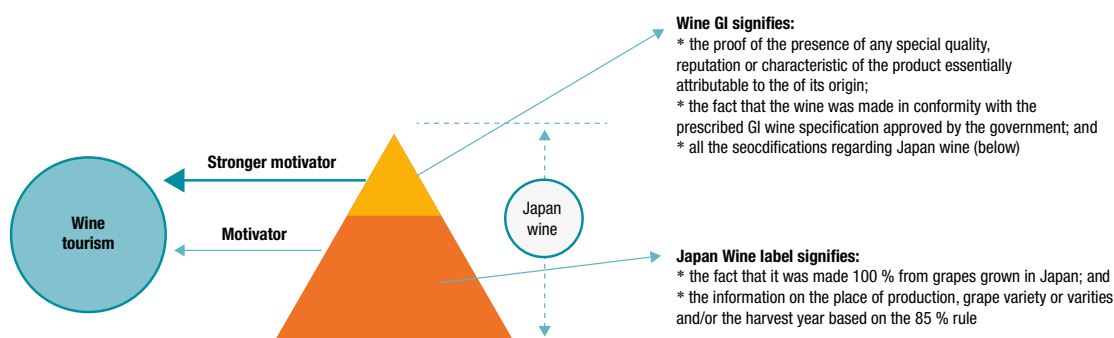
Table 2.
The 85 % standard in Japan's wine labelling rule

● For the name of a region to be mentioned as the place of grape harvest:
➤ At least 85 % of the grapes used for making the wine must be from that region.
● For the name of a region to be mentioned as the place of winemaking:
➤ At least 85 % of the grapes used for making the wine must be from that region and the grape fermentation process must occur in that region.
● For the name of a region to be mentioned as the place of grape fermentation for the wine:
➤ The fermentation process must occur in that region. It must also be mentioned on the wine label that the grape harvest does not occur in that region.
● For the name of a grape variety or varieties to be mentioned:
➤ In the case of a single varietal wine, at least 85 % of the grapes used for making the wine must be from that variety.
➤ In the case if a blended wine using two varieties, for both the varieties to be mentioned on the label, those varieties must make up at least 85 % of the grapes used for making the wine.
➤ In the case of a blended wine using three varieties, for all three varieties to be mentioned on the label, those varieties must make up at least 85 % of the grapes used for making the wine.
● For the harvest year to be mentioned:
➤ At least 85 % of the grapes grown used for making the wine must be harvested in that year.

Source: Wine Labelling Rule in Japan.

Importantly, a Japan Wine label does not guarantee any special quality, reputation or characteristic of the concerned wine essentially attributable to the terroir of the place of its origin. On the other hand, while communicating to customers all the specifications regarding Japan Wine, a wine GI guarantees the presence of a special quality, reputation, or characteristic of the concerned wine essentially attributable to the terroir of the place of its origin and that the wine was made in conformity with the prescribed GI wine specification approved by the government. Because of this, compared with non-GI Japan Wine, GI-labelled Japan Wine can more strongly motivate customers to visit wine-producing regions for feeling the terroir embodied in the wines they taste, as shown in Figure 2. Consequently, the effective use of wine GIs and their power of terroir-based brand storytelling underpins one of the core elements of wine tourism promotion strategy in Japan.

Figure 2.
The difference between wine GIs and the Japan wine label



Source: Author.

As stated above, when combined with effective terroir-based storytelling, a wine GI can be a significant tool for encouraging regional wine brands and wine tourism in the GI denominated region. At the same time, in order for wine GIs to be fully utilized for these purposes, local wine communities are expected, through networks with other entities including municipalities, central government agencies and tourism companies to formulate and promote a clear strategy for terroir-based brand communication. In this regard, local wine communities in Yamanashi and Hokkaido are still in the development stage. In addition, there are challenges that must be overcome for the effective promotion of GI-based wine tourism strategy in Japan. While being based on my research, five challenges will be analyzed below.



3. Challenges for GI-based Wine Tourism Marketing in Japan

3.1. Terroir-based Marketing Regarding Signature Grape Varieties in GI-denominated Regions

One of the most important keys for successful GI-based wine marketing is to identify a signature grape variety or varieties that can match the *terroir* of that region and to appeal about that *terroir* for the identified signature grape variety or varieties. This is true of many successful wine-producing areas in Europe.

In this regard, as Table 1 shows, one of the requirements for the wine GI designation in Japan is to identify a grape variety or grape varieties for the making of the concerned GI wine and insert the variety or varieties into the product specification. 42 grape varieties are mentioned in the GI Yamanashi specification, while 57 varieties are mentioned in the GI Hokkaido specification¹. Local wineries in those regions can choose one or more varieties from those identified varieties to make GI wines. Importantly, all the varieties specified in the GI wine specification do not necessarily match the *terroir* of the respective GI-denominated region. It is of vital importance, therefore, for winemakers in those GI-denominated regions to identify a signature grape variety or varieties that can perfectly match the *terroir* of the regions and integrate *terroir*-based stories regarding those signature varieties into their regional brand strategy.

Yamanashi can provide a successful case in this regard. This region is the birthplace of Japan's wine industry today. The Katsunuma area is the core wine-producing area in Yamanashi. The success of winemaking in Yamanashi has been largely dependent on the region's initiative in discovering the value of Koshu grape as its signature varietal for producing Japan Wine in that region. Koshu is Japan's native grape variety for white wine. The taste of Koshu wine tends to be rather flat and to lack individuality because of its low sugar content in fruits, weak flavours and insufficient acidity. Local grape farmers traditionally looked down on the value of Koshu as a grape variety for wine. In order to improve the taste of Koshu wine in this regard, local wineries, Yamanashi Prefecture's Institute of Fruit Tree Science and the University of Yamanashi have made intensive efforts, sometimes under industry-academia collaboration, to successfully upgrade their viticultural and oenological practices for making wines from Koshu grapes. Consequently, the value of Koshu as a variety for making Japan Wine has recently been highly appreciated, and Koshu has now become the most popular grape variety for producing Japan Wine. As of 2018, about 96 % of Koshu grape cultivation in Japan took place in Yamanashi and about 48 % of wine grapes made in Yamanashi were Koshu grapes (NTA, 2020).

At the same time, intensive regional efforts were made, under the collaboration between local wineries and the local government, for Yamanashi to be registered as the first GI for wine in Japan. After the successful designation of GI Yamanashi for wine, many initiatives have been taken by various public or

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¹ The specifications for GI Yamanashi and GI Hokkaido, which shows the information, among others, on what particular grape varieties can be used for those GIs, can be found on this website run by NTA: https://www.nta.go.jp/english/taxes/liquor_administration/geographical/02.htm.



private entities in the region for promoting and advertising GI Yamanashi wines as flagships of Japan Wine made in that region.

All these efforts have contributed to encouraging people to pay attention to the linkage between the quality of GI Yamanashi wines and the localities of Yamanashi, and motivating people to visit wineries in Yamanashi to this end. On the other hand, Yamanashi consists of diverse smaller winemaking areas, each of which has particular terroir. For people to be more motivated to visit wineries in Yamanashi, those particularities of terroir in different smaller areas within Yamanashi should be effectively communicated to them. An ultimate model in this regard may be Bourgogne, which consists of more than 1,200 vineyards that are clearly delimited according to the terroir of each land and prioritized in the hierarchical system of AOC.

In this respect, there has been a local initiative in uniting the opinions of all the wineries in the Katsunuma area of Yamanashi to apply for the GI Katsunuma designation. One of the proposed specifications for GI Katsunuma wines is that the GI Katsunuma wine must be made 100 % from “Koshu grapes” grown in the Katsunuma area of Yamanashi. If GI Katsunuma for wine is successfully designated, Yamanashi will have the two-tier GI system for wine –GI Yamanashi on the lower level and GI Katsunuma on the higher level–. While being the birthplace of Koshu grapes, Katsunuma has been one of the most popular wine tourism destinations in Japan. GI Katsunuma is expected to make the brand value of that region stronger by providing customers with more distinctive terroir information regarding that particular area in Yamanashi. It seems to take some time, however, for all the wineries in the Katsunuma region to agree on the product specifications for GI Katsunuma.

Turning to Hokkaido, signature grape varieties for winemaking in that region have been those that are resistant to cool winter temperatures in that area, such as Kerner and Zweigelt. On the other hand, under the current global warming, Pinot Noir has gained much attention as a possible signature grape variety in Hokkaido, especially in the Yoichi area of Hokkaido. In fact, the local government in the Yoichi area has promoted a local wine tour called Yoichi Niki Wine Tourism Project, in which a focus is placed on the wines made from Pino Noir grown in that region. Hokkaido has several wine-producing regions that have different types of terroir. This project shows that, to maximize the effectiveness of GI Hokkaido for promoting wine tourism in Hokkaido, it is important to appeal about the particularities of the terroir for different signature varieties in different winemaking areas of that region.

3.2. Integrated Marketing of Local Wines and Foods in the Same Regions

When promoting a regional wine brand, it is important to connect it with other local food brands in the same region. The combination of the brands of local wines and foods in the same region can generate a stronger impetus for people to visit the region. In Europe, there are many places where integrated initiatives for promoting GI wines and other local foods such as cheese and olive oil in the same regions have led to generating stronger regional brands to attract visitors to those regions. In Japan, interest in localities of foods and drink has been growing among consumers, but not enough efforts have been made to combine the brands of local wines and foods in the same places as a matter of integrated wine and wine tourism marketing.



For example, the Tokachi region of Hokkaido is famous as a winemaking region thanks to quality wines, including GI Hokkaido wines, made by the Ikeda Grape and Wine Research Institute. The institute is Japan's first local municipality-run institute for winemaking and is a popular wine tourism destination, annually attracting about 300,000 people. At the same time, the fame of Tokachi as Japan's largest of natural cheese-producer region has also been growing. In Tokachi, there are about 40 makers of natural cheese, and they account for about 60 % of the entire production of natural cheese in Japan. Although Tokachi has not yet been designated as a GI for cheese, there has been a local initiative to promote Tokachi as a prominent cheese-making region by giving a certification of Tokachi Brand to those cheeses that are made in conformity with the product quality standard prescribed by the Tokachi Brand Certification Organization. However, no significant marketing initiative has been taken to combine the brands of GI Hokkaido wines produced in Tokachi and that of certified Tokachi Brand natural cheese to upgrade the attractiveness of Tokachi as a wine and cheese tourism destination.

The same type of issue can be seen in Yamagata. As the fourth largest Japan Wine-producer region with 15 wineries in its territory, Yamagata has been increasingly recognized as a popular wine tourism destination. At the same time, the fame of Yamagata as a sake-making region has been growing since the name of the region was designated as the country's third GI for Japanese sake in 2016. Sake, sometimes called "rice wine" in foreign countries, is Japan's traditional alcoholic beverage made primarily from rice and water. Sake has a very long history in Japan with its origin dating back as far as 2,500 years ago when rice growing became prevalent in Japan. Sake is deeply rooted in Japanese traditional culture. There are 1,523 sake breweries in Japan, from Hokkaido in the north to Okinawa in the south. Among them, 52 sake breweries are located in Yamagata. The Yamagata Sake Association has actively promoted sake brewery tourism. However, no significant marketing effort has been made to combine the regional brands of Japan Wine made in Yamagata and that of GI Yamagata sakes to upgrade the attractiveness of Yamagata as a wine and sake tourism destination.

In both of the above-mentioned cases, the issue is the lack of cooperation and shared vision between responsible entities for the same purpose of revitalizing local tourism economy. To solve this issue, the local municipalities in the respective regions should take a leadership role in coordinating the promotional efforts of all the relevant local parties, including winery associations, other food and beverage associations, and local DMOs (destination management organizations).

3.3. Biodiversity Conservation and Wine Tourism

In Europe, biodiversity conservation in vineyards has increasingly been regarded as one of the key factors in successfully promoting regional brand value of wines. On the other hand, in winemaking regions of Japan, including the two GI-denominated regions, namely Yamanashi and Hokkaido, there has been no significant regional-level-initiative in promoting biodiversity preservation in vineyards.

One exception is a biodiversity conservation initiative promoted by Mercian, Japan's largest winemaker, in its own 20 ha vineyard in the Mariko region of Nagano. The vineyard, called the "Mariko Vineyard," is located in a broad winemaking area called the Chikuma River Wine Valley, which has 26 wineries in its territory and has been a popular wine tourism area in Nagano. Since 2014, Mercian has run a biodiversity survey project to identify the fauna and flora in the Mariko vineyard area in collaboration



with the National Agriculture and Food Research Organization and with Earth Watch Japan, an international environmental NGO. In line with this project, Mercian has also promoted viticultural practices using native grasses as cover crops in the vineyard with the aim of facilitating biodiversity in the local area. One of the ultimate goals of these initiatives is to find a way for the reduction of pest populations by utilizing natural enemies such as spiders.

An issue in the above-mentioned case is that Mercian has still not succeeded in fully utilizing these initiatives for upgrading their wine brands and in raising the awareness of general consumers about the importance of biodiversity in winemaking. Also, its biodiversity conservation initiatives have not yet spread to other wineries in the valley. Mercian is now expected to play a strong leadership role in maximizing the impact of its initiatives in this regard on the entire valley and showing a model case to strengthen the environmental aspect of a regional wine brand in Japan.

Behind the lack of regional-level-initiative for biodiversity preservation in vineyards in Japan exists the Japanese wine consumers' lack of knowledge about the importance of biodiversity in vineyards. In other words, Japanese winemakers have not been under market pressures to move towards sustainable viticultural practices for biodiversity preservation. To overturn this situation, local universities and research institutes should more actively conduct research and educate consumers on the significance of biodiversity in vineyards. In addition, in collaboration with environmental NGOs and/or government agencies, efforts should be made to create and introduce biodiversity certification schemes for viticultural practices in Japan. Such schemes have already been introduced for rice-growing practices in some areas of the country.

3.4. Communication Strategy for Foreign Tourists

International inbound tourism has been a significant driving force for wine tourism in major wine-producing countries. Bordeaux hosted almost 2.7 million wine tourists during the high season, 39 % coming from abroad, mainly from European countries, with 4 % from the USA. In New Zealand, 13 % of all international visitors visited at least one winery, while in Australia, there were more than five million visitors to the country each year that went to a winery during their stay (Thach and Charters, 2016).

Tourism from abroad is one of the most promising businesses in Japan. In 2018, the annual number of inbound travelers to Japan topped 30 million for the first time (JINTO, 2018). That is about six times the figure recorded in 2003, when the government set a target of welcoming 10 million visitors by around 2010. According to a survey published by Japan Tourism Agency (JTA) in 2017, 68.3 % of the foreign tourists who responded to the survey reported that they were motivated by Japanese food to visit Japan (JTA, 2017). In fact, an increasing number of local municipalities have put an emphasis on local gastronomy as a cultural asset for promoting food and beverage-based tourism in their territories.

However, local wine communities in Japan have not benefited from this increasing momentum in international inbound tourism. An important reason is that there is almost no online portal site that can provide foreign visitors with sufficient English or other foreign-language-based information about wine tourism destinations in the country. The websites of Japan Wineries Association, Yamanashi Wine Manufacturers' Association, Wine Cluster Hokkaido, and Nagano Prefecture Government



provide some integrated information on wine tourism routes in the respective regions, but only in the Japanese language. In addition, most of the Japanese wineries' websites do not provide information in English or any other foreign language. The same issue can be seen in the websites of major wine festivals in Japan, namely, Yamanashi Wine Tourism, Shiojiri Winery Festival, Yamagata Wine Bar and Ikeda-Cho Wine Matsuri.

One exception in this regard may be the website titled "Landscape Interwoven with Vineyards –Kyotoh Yamanashi Wine County—" ². Kyotoh is a wine-producing area of Yamanashi that covers the Katsunuma area. The website was created under public-private collaboration in the Kyotoh region in 2018, when a combination of vineyard landscapes in the region was certified as a Japan Heritage by the Agency for Cultural Affairs of the Japanese government. Japan Heritage is a heritage certification system established by the Agency in 2015 to recognize the narratives that bind Japan's regional cultural properties and effectively promote the narratives pertaining to cultural properties within Japan and abroad ³. The point here is that, although the website provides limited information in English as well as Japanese on wine tourism routes and the historical stories of wine-related sites and architectures in the Kyotoh region, it fails to provide any narratives in English nor Japanese on the terroir of the Kyotoh region and what GI Yamanashi signifies to wine consumers.

On the other hand, a growing number of Japanese wineries have participated in large international wine markets, including ProWein. Wineries in Yamanashi and Hokkaido have been given momentum in this regard as a result of the designations of GI Yamanashi and GI Hokkaido, respectively. However, their export efforts have not sufficiently contributed to the promotion of inbound wine tourism in Japan. Through their promotional activities in cooperation with export promotion agencies such as JETRO (Japan External Trade Organization), they should more actively encourage foreign buyers, influencers and media representatives to come to Japan, visit wineries and vineyards, see their viticultural and winemaking practices, taste their high-quality wines and feel the terroir of their regions. Those foreign visitors are then expected to be word-of-mouth ambassadors who can share their travel experiences to the world.

In general, local municipalities and wine associations in Japan have seriously lacked a strategic vision for attracting foreign tourists to visit their places. Their limited linguistic ability in English and other foreign languages has contributed to this situation. One way for tackling this issue is for them to hire foreign communication experts who can play a crucial role in formulating and executing communication strategies for foreign tourists. Another way is for them to establish international networks with wine-producing regions in other countries so that they can directly learn from those regions' best practices toward foreign visitors.

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2 The website created and managed by the Kyotoh Wineresort Association. Retrieved from <https://global.kyoto-japan-heritage.jp/>.

3 Japan Heritage Portal Site. Retrieved from <https://japan-heritage.bunka.go.jp/en/index.html>.



3.5. Revitalization of the Wine Grape Farming Sector

In Japan, the number of wineries has been on the increase in recent years. This trend has been boosted in areas called the Special Zone for Wine Production, a zone designated by the Japanese government for facilitating the growth of startup wineries. In this zone, the minimum annual volume of output required for a winemaking license was lowered from 6 kl to 2 kl. More than 50 regions throughout Japan have been designated as the “Special Zone for Wine Production” by the government.

On the other hand, many of the wineries in Japan, including the ones newly established in the above-mentioned zones, are greatly dependent on the supply of wine grapes from grape farmers. In 2018, only 15.1 % of the grapes crushed by Japanese wineries originated from their own vineyards, while 83.3 % of the grapes crushed by Japanese wineries came from grape farmers (48.7 % of them were from contracted farmers, while the remaining 34.6 % of them were from agricultural cooperatives) (NTA, 2020). Demand for wine grapes has been increasing because of the growing popularity of Japan Wine.

The problem here is that wineries in Japan cannot expect a stable supply of wine grapes from farmers. This is mainly due to the aging issue of farmers and the failure of smooth transfer of vineyard ownership from older to younger generations. The issue of aging can be seen in the entire farming industry in Japan. Over the last several decades, Japan’s farming population has steadily decreased as the average age of farmers has risen. In 2019, there were 1.68 million people engaged in agriculture, representing a decrease of 57 % compared to 2000 and that the average age of those people was 66.8 [MAFF, 2019]. In addition, grape farmers in Japan tend to place their efforts in the growing of table grapes over wine grapes, because wine grapes are generally valued at roughly one-third of the price of the most common table grape in the country⁴. As a matter of GI law in Japan (see Tab. 1), at least 85 % of the grapes used to make the GI wine must come exclusively from the GI-designated region. The effectiveness of GIs can only be secured with the stable supply of wine grapes grown in GI-denominated regions.

To solve this issue, multiple initiatives must be taken at the local and national levels. Local municipalities in wine-producing regions should create a legal scheme to discover and monitor the vineyards that are likely to be abandoned by farmers and promote the smooth transfer of the ownership of those vineyards to people in the younger generation who are willing to engage in wine grape cultivation. In addition, knowhow and techniques for growing high-quality wine grapes must be effectively developed and shared by local research institutes and universities with local grape farmers as well as wineries. Furthermore, the branding of farmers through various channels, including the branding of vineyards, must be promoted.

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4 In Nagano, the average price for wine grapes is JPY 280 (USD 2.62) per kilogram. https://www.pref.nagano.lg.jp/nogi/keiei/keiei_list.html.



Also, grape farmers can be an active player in wine tourism. They can provide a variety of services to wine tourists, including direct-to-consumer sales of their own branded wines, viticultural education opportunities, overnight farm stays and other types of recreation and entertainment. In this regard, it is important to utilize GI designation as an important opportunity to activate the integration of wine grape farmers into wine tourism initiatives. At the same time, local grape farmer associations should function, in collaboration with local wineries associations and municipalities in the same regions, as a platform for farmers to share their best practices in wine tourism activities.

4. Conclusion

The wine industry and wine tourism have been booming but still in the initial stage in Japan. One important key for their constant development is GI-based regional brand strategy. Given the fact that there are only two wine GIs designated in Japan, more wine-producing regions in the country should move towards GI registration. In addition, there are significant challenges that must be overcome, as mentioned in this chapter.

As for Japan's two wine GIs, namely GI Yamanashi and GI Hokkaido, in order for them to be fully utilized to promote wine tourism in the respective regions, it is of crucial importance for each of the regions to have a strategic vision for tackling a diverse range of issues at the same time, especially the five challenges mentioned above. The rural municipality in each of the regions should play a more active role for this purpose, given the fact that the local winery associations and tourism promotion entities in the regions have limited capacity in this regard.

At the same time, those municipalities in Yamanashi and Hokkaido should network with and learn from each other about how their wine GIs can be best utilized for the promotion of wine tourism in the respective regions. Furthermore, the municipalities in the four major wine-producing regions, namely, Yamanashi, Hokkaido, Nagano and Yamagata, should together create a nationwide forum where all the municipalities and wine-related entities in Japan can combine their promotional efforts for the development of local wine clusters and wine tourism. Relevant national agencies, including MLIT (Ministry of Land, Infrastructure, Transport and Tourism), MAFF (Ministry of Agriculture, Forestry and Fisheries), NTA and Japan Tourism Agency, should support the creation and management of the forum and formulate and execute a nationwide strategic plan, based on the discussions and activities in the forum, to promote wine tourism in the country. In line with these initiatives, international wine tourism promotion networks should be established between Japan and other major wine-producing countries. In all these initiatives, robust government-industry collaboration is needed.



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Mexico

Wine tourism sustainability of a promising emerging market

Gabriel Padilla

Expert Consultant in commercial promotion and business management
(Mexico)

Lluís Tolosa

Escuela de Enoturismo de Cataluña (Spain)

Abstract

The phenomenon of wine tourism in Mexico has gained remarkable importance, growing rapidly over the last two decades, positioning itself as one of the most important emerging tourism destinations in the world, which contrasts with the cases of more mature markets. This chapter demonstrates the growth of the two most consolidated wine tourism routes, mainly in the states of Baja California and Querétaro, not to mention the recent cases of the Coahuila and Guanajuato routes; as well as the cases of wine tourism development in the states of Aguascalientes, Zacatecas and Sonora.

A series of good, sustainable wine tourism practices coupled with greater wine culture have also been identified, starting from the conservation of the agricultural vocation for wine production in Mexico. Finally, given the recent national and global context affected by the measures to contain the spread of the COVID-19 disease, recommendations are issued for various actions for a post-pandemic agenda that allow us to envision actions for an orderly reopening of wine tourism practices in Mexico.

1. Introduction. The Historical Role of Vineyards and Wine in Mexico

The history of vineyards and wine in Mexico is much more relevant than it is sometimes realised. It was Hernán Cortés, the conqueror of Mexico, who was the main advocate of vine growing in the Americas. The most relevant historical symbol is his order to plant a thousand vines for every hundred



natives (1525). Thus, an age-old cultural tradition spread to each of its domains in the Americas. This is how vineyards spread from Mexico throughout the American continent. Above all, with the order of King Carlos I of Spain that every ship bound for the Indies should carry vines and olive trees for planting (1531).

First, vineyards spread to a large part of New Spain (1535-1821), which with its capital in Mexico City came to cover the whole of Central America and much of North America, since we sometimes forget that it spanned from California to Alaska. Thus, grapes became a staple crop on the American continent, as they were essential to make the necessary wine for the celebration of mass. But, in addition, vineyards were the symbol of Christianity rooted in the Americas and the hallmark of Spanish colonial rule.

The Spanish conquistadors who explored northern Mexico for gold found another treasure. The Parras Valley (Coahuila) was rich in springs and wild vines. The Jesuits established the mission of Santa María de las Parras (1594) and made their first wines with those native vines. Shortly after, Lorenzo García received an endowment of land by the grace of King Felipe II for the express purpose of planting vines. Thus, the first wine company was founded under the name Bodegas de San Lorenzo (1597), currently known as Casa Madero, the oldest winery in America and, currently, the most internationally recognized winery in Mexico.

That first period of expansion was halted with the Spanish veto on overseas vineyards. King Felipe II, under pressure from Castilian producers, prohibited new vine plantations in the Spanish colonies in the Americas and decreed the removal of the existing vineyards (1595).

In 1697, Juan de Salvatierra, also a Jesuit, founded the mission of Nuestra Señora de Loreto, in the south of the Baja California peninsula. This mission was of vital importance because it was from there that the monks who founded the main missions in the peninsula and in Alta California came, which contributed to the development of winegrowing in the region (CVA / CMV, 2018).

Later, even the production of wine was prohibited (1699), except for the Jesuits, who needed it for the Eucharist.

However, the pressure from the Castilian producers was to continue; first they achieved the royal ban on the importation of wines and spirits from the colonies (1774) and later the general order to uproot the vines in the Americas (1803). It had to do with guaranteeing the massive export of Spanish wines and spirits to the overseas colonies.

Following the independence of Mexico (1810-1821), and the proclamation of Agustín de Iturbide as emperor, the first protection orders for Mexican vineyards were issued (1822) and taxes of 35 % were imposed on foreign wines and 40 % on Spanish wines (1823). Shortly after, the School of Agriculture was established which included the subject of vine cultivation and management (1843).



During the hegemony of the Porfiriato, Mexican winegrowers received a strong boost, since Porfirio Díaz, seven times president of Mexico (1876-1911), ordered that there be at least one vineyard in each state of the Mexican Republic. This is when the importation of more than a million French vines took place, through the Concannon family, of Irish origin, mainly planted in the surroundings of Celaya (Guanajuato). However, at the beginning of the 20th century, the agricultural, political, social and economic setback that the Revolution brought with it caused the country's wine sector to postpone wine production until 1920 (CVA / CMV, 2018).

Fortunately, during the third decade of the new century, another event boosted the growth of vines; it was when the first migrations to the country of foreigners interested in making wine took place. The most notable case is that of Angelo Cetto, who arrived at the port of Veracruz in 1924, with 218 other Italians, in a project promoted by President Álvaro Obregón. Cetto decided to venture north and, in 1928, laid the foundations of what would become Bodega L.A. Cetto in Tijuana, today the largest winery in Mexico (CVA / CMV, 2018).

From that moment on, there was significant growth, until the 1970s. The area planted with vines dedicated to winemaking increased, the productive and bottling capacity of the wineries increased, and investments were made in training, marketing and distribution. Then the national wine program was created, and with it began the true recent boom of Mexican wine. This led to the incorporation of European strains, investment in the renewal of machinery and the hiring of prestigious winemakers. In just 10 years, wine production tripled, reaching more than 20 companies that producing more than 80 different labels at the beginning of the 80s (CVA / CMV, 2018).

In the last stage of this long history, already in the 21st century, wine tourism is becoming the new engine for the growth of investment in the sector; that nowadays offers unique experiences in Baja California and in the Centro-Bajío area of the country, as is the case of Querétaro. The vector that drives this process is the rapid growth in consumption and the desire to get to know Mexican wine of more and more sectors of the population.

2. Wine Tourism Routes in Mexico

Mexican wine tourism routes are located, both geographically and prominently, in the north and centre of the country (Figure 1). Although isolated initiatives by wineries and tour operators to offer guided tours of vineyards, cultural festivals and gastronomic events existed, these had not been integrated into a specific product as the current wine routes are now, especially those that have emerged in the north of the country in Baja California and in the Centro - Bajío in Querétaro (Contreras & Ortiz 2019).



Figure 1.
Wine regions of Mexico



Source: Consejo Mexicano Vitivinícola A.C.

2.1. Baja California Wine Route

The State of Baja California is located on a narrow peninsula between the Sea of Cortez and the Pacific Ocean, 100 kilometres to the south and west of the United States. In particular, it is the leading wine producer in Mexico, at more than 80 % of domestic production, and has approximately 4,000 hectares under vines on lands in the valleys of Santo Tomas, San Vicente, Valle de Guadalupe, San Antonio de las Minas, Ojos Negros Valley and Tecate. In Guadalupe Valley, the wine route is located, 25 kilometres north of the city of Ensenada, 85 kilometres south of the city of Tecate and 15 kilometres from the Pacific Ocean.

The Baja California Wine Route was set up in 2004, with just sixteen wineries, and today it has more than eighty. It runs through the Guadalupe valley, the Santo Tomás valley, the San Vicente valley, San Antonio de las Minas, Ojos Negros, Tanamá, the Grulla valley and the Palmas valley. The Vine and Wine Museum, located between the valleys of San Antonio and Guadalupe, is a good starting point to learn about the history of wine in the area.

It is currently estimated that more than 700,000 wine tourists visit Baja California attracted by the wineries and wine-related activities. The presence of American visitors should be noted, thanks to the proximity of San Diego (California), a mere two-hour car journey away, and the possibility of landing at the Tijuana airport and traveling by car to the Guadalupe Valley (Figure 2).



Figure 2.
Main winegrowing valleys of Baja California



Source: www.roganto.com

The wine tourism offer in this State has the added value of Mexican hospitality, kindness and good service. It is made up of food and wine tours through the main wineries and restaurants in the region, where the landscape is of paramount importance. In addition, there are thematic, cultural and gastronomic events on at different times of the year, highlighting the Harvest Festivities, the Paella Competition, the Ensenada Tierra del Vino International Competition and the Viñedos en Flor festival. There are small boutique hotels, country restaurants, spa and wine therapy services, shops specializing in food products and handicrafts, among others (Contreras & Ortiz, 2019).

2.2. Querétaro Wine Route

The State of Querétaro, in the north central region of the country, limits to the north with Guanajuato and San Luis Potosí, to the south with Hidalgo and the State of Mexico and to the west with Michoacán. With 11,684 km² it is the fifth least extensive state and, with 156.45 inhabitants/km², the seventh most densely populated. This State has its own wine route, which includes the municipalities of San Juan del Río, Ezequiel Montes, Bernal and Tequisquiapan (Arévalo, 2018).

The Querétaro Wine and Cheese Route was set up in 2007, grouping half a dozen wineries and half a dozen cheese factories in a magnificent semi-desert territory, where viticulture is extreme due to its latitude and altitude. In fact, it is the southernmost wine-growing region in the northern hemisphere, at the limit latitude for vine growing, with extreme viticulture vineyards planted at 2,000 metres asl on average.



The route has been an unusual commercial success thanks to its proximity to Mexico City, just over 200 km to the northwest, and it is considered the second most important tourist product in Querétaro. Unofficial estimates put the tourist figures at around 800,000 visitors a year. The Cheese and Wine Fair receives 70,000 visitors, while the Grape Harvest Festivities, held in the different wineries from July to September, reach an attendance of 50,000 people (Contreras and Ortiz, 2019).

The main wine tourism driver of the route has always been the Catalanian company Freixenet (since January 1st, 2019 part of the German group Henkell & Co.), founded in 1987 in Ezequiel Montes. Over the years it has become the largest sparkling wine producer in Mexico, one of the largest wineries in North America and one of the most visited wineries in the world, with more than 300,000 visitors a year.

Along with Freixenet, the wine tourism and gastronomy on offer at Bodegas De Cote stands out and the dissemination of Mexican traditions on the old farm of Viñedos Azteca, especially the Charreada, which shows the equestrian skills of the Mexican 'charros'. The great festivals of La Redonda are also extremely popular. Also noteworthy are the 180 hectares of real estate and wine tourism development in Puerta del Lobo. The Viñedos del Polo real estate complex is also nearby, although it is more linked to the private polo club than wine tourism.

Among the smaller and most charming projects, Casa Vegil –located in an old 18th century hacienda– and Cavas Donato –specialized in organizing events– stand out. In addition, Viñedos Los Rosales, Vinícola San Patricio, Vinícola Tequisquiapan, Vinos del Marqués and Tierra de Alonso are open to the public. They also offer wine tourism, but by reservation only, Viñedos Paso de Serra, Vinícola San Juanito, Cava 57, Bodegas Vaivén, Tierra de Peña and Vinaltura, with an interesting specialization in micro-vinification.

2.3. Coahuila Wine Route

Coahuila has been one of the most important wine regions in Mexico ever since colonial times, with a historical production of spirits, liqueurs, vinegars, wines and sweet wines. Casa Madero (1597) as mentioned before, the oldest vineyard on the American continent and the most internationally recognized in Mexico is in the Parras Valley. It has visits to the winery, wine museum, accommodation service, organization of family events and company meetings, with around 3,000 visits per month.

The Coahuila Wine Association has registered more than 1,000 hectares of vineyards that correspond to about twenty wineries. In 2018 they set out to promote the Coahuila Wine Route, although it is not yet fully developed. As in other areas of Mexico, wine tourism has a strong boost here with the August Grape Harvest Festival, with large events at Casa Madero and other wineries such as Don Leo, Rivero González, Hacienda el Perote and Las Pudencianas.



2.4. Guanajuato Wine Route

The vineyards in the state of Guanajuato only account for 5 % of the vineyard area in Mexico, but its wine tourism development is exceeding by far its specific weight as a wine producer. The first step was taken in 2012 with the creation of a first wine tourism proposal with half a dozen wineries, the support of the Guanajuato Secretariat of Tourism and the cultural and architectural attractions of San Miguel de Allende, which is a World Heritage Site by UNESCO and Dolores Hidalgo, one of Mexico's Magical Towns. The Guanajuato Grape and Wine Association was created in 2014, and today represents 32 producing wineries, more than half of them carrying out wine tourism activities.

The Guanajuato Wine Routes are structured into five differentiated routes. The main route is the 'Ruta de San Miguel de Allende - Dolores Hidalgo', which includes wineries with such magnificent architecture as the Cuna de Tierra and Tres Raíces, and the great real estate and winery development of La Santísima Trinidad—combining vineyards, olive groves and lavender—, in addition Bernat Vinícola, Cavas Manchón, Los Arcángeles, Los Senderos and the Wine Museum.

The second outstanding route is the San Miguel de Allende-Querétaro Route, with the underground cellars of Viñedos Toyán, half a century of winemaking tradition in Dos Búhos and other wineries such as San José Lavista, Puente Josefa and the great real estate and wine developments of San Lucas and Viñedos de los Senderos, two of the La Santísima Trinidad sister projects on the San Miguel de Allende-Dolores Hidalgo route.

The León Route includes three wineries: Viñedo El Lobo, Vinícola Octágono and Vinos Guanamé. The Salvatierra Route includes the Dos Jacales winery, and the Guanajuato Route includes the Camino de Vinos winery, the highest in Mexico, at an altitude of 2,400 metres, with its winery hotel and an old mining operation restoration.

2.5. Wine Tourism in Aguascalientes, Zacatecas and Sonora

Aguascalientes is the fourth grape-producing state in Mexico, although only 30 % of the production is destined for winemaking as the remainder is to produce juices and concentrates. In 2013, the Wine Growers Council decided to promote a wine tourism program with the five existing wineries at that time and, in 2017, the route was announced by the Ministry of Tourism. Shortly before, the Wine and Cheese Fair had been launched, which has evolved to become VinoFest, a place for the promotion of wine and gastronomy. Although there are currently a dozen producing wineries, VinoFest 2019 continued to include only the visit to five wineries: Origen, Santa Elena, Hacienda San Luis de Letras, Casa Leal and Bodegas de la Parra.

Zacatecas also has a long winemaking tradition, although in recent years it has established itself as a major producer of industrial grapes, up to 40 % of domestic production, for concentrated juices, liquors and jams; in addition to being the usual supplier of grapes for winemaking for the main wineries in Querétaro and Guanajuato. The best-known winery is Campo Real, a pioneer in wine tourism, which takes advantage of its proximity to the city of Zacatecas to offer guided tours, a visit to



the Barrica Museum and other wine tourism activities, including its characteristic little train to make the journey through vineyards to their popular Grape Harvest Festivities.

Sonora is the main table grape producer in Mexico, with 92 % of the production destined to this product. In 2015, the Sonora Foundation undertook a project to cultivate *vitis vinífera* and produce wine in the Cananea Valley, giving a boost to the emergence of the Vinos de Altura winery. As part of the strategy to promote viticulture in the state, the Sonora Tourism Promotion Commission has contemplated the design of a binational route between Sonora and Arizona, which includes visits to some vineyards in both countries, and the offer of cultural and gastronomic events to promote the wines of the region.

3. Wine Tourism Route Sustainability in Baja California and Querétaro

The most important activities carried out along the emerging wine routes in Mexico are wine tasting, winery facility tours and the growing attendance of visitors at recreational activities such as events, concerts and grape harvest festivals. However, these activities will not guarantee adequate sustainable development of the sector if the Mexican wine culture is not strengthened.

For this to happen, it is necessary to diversify wine tourism activities that promote the acquisition of greater knowledge about wine, and specifically about traditions and history, folklore, community integration, and care and respect for the environment. All of them can promote wine culture and be the basis for the sustainable development of wine production in Mexico (Montiel *et al.*, 2019).

The region comprises the various valleys of Baja California and, especially, the Guadalupe Valley, has environmental problems that put the sustainability of grape production at risk and, therefore, of wine and wine tourism practices. It has to do with the groundwater overexploitation, water shortages are imminent, the changes in the natural course of the rivers due to the overexploitation of sandy substrates for the construction industry and the other effects derived from climate change, with its consequences in altering the frequency of rainy periods and extending dry spells. In general it is necessary to broadly implement sustainable agricultural practices which, in addition, diminish the indiscriminate use of pesticides and fertilizers, enable the adequate management of liquid and solid waste and reduce carbon dioxide emissions (Montiel *et al.*, 2019).

The rise in wine tourism activity in the region has exerted pressure on the natural resources. The increase in the number of tourists has led to a greater demand for services, in terms of infrastructure construction, tourist facilities, consumption of production inputs, as well as the generation of residues and waste and the consequent impact on the soil, on water, energy and biodiversity, adding to the problems already detected.

In Baja California, the conclusions of a recent study link the implementation of good practices with the development of sustainable wine tourism and the strengthening of wine culture. This should promote a better balance between the development of infrastructure, facilities, wine production and consumption,



on the one hand with the conservation of existing natural resources, which are those that give the area its original landscape, tourist and oenological value in a unique way, on the other (Montiel *et al.*, 2019).

In this context, there are examples of interesting actions carried out by the wineries themselves, such as the dam construction to mitigate the scarcity of water by harvesting the rain; training to obtain knowledge on organic farming techniques; waste separation, recycling, collection of solids and, even, the acquisition of machinery and precision agricultural equipment for more efficient use of water resources, etc.

However, this ecological awareness must be understood by the tourists, who must be aware of the damage caused to the environment if they not respect the indications at each of the visiting points. In this sense, opportunities have been identified to introduce more sustainable wine tourism practices in the following areas (Montiel *et al.*, 2019):

1. Reservation of areas for agricultural use.
2. Improvement of tourist offer quality.
3. Reordering of signage and street furniture.
4. Improvement of access infrastructure and rural roads.
5. Efficiency of transportation services.
6. Staff training.
7. Visitor attention by appointment or reservation.
8. Delimitation of visitor capacity.
9. Appreciation of attractions around wine.
10. Ecological awareness towards the needs of the environment and of the wine industry.
11. Community participation in trades related to grape production.
12. Strategic alliances between wine producers and local authorities.
13. Standardisation of independent development projects with existing ones.
14. Promotion and diversification of wine culture activities.

In Querétaro, in contrast to Baja California, the model is more focused on the deployment of spaces, infrastructure and themed events, offered by the wineries along the wine and cheese route. However, apart from some cheeses, local gastronomy has not been integrated into the context of the route, neither in the wineries, nor in the catering establishments in key places such as Tequisquiapan or



Bernal. On the contrary, the offer is dominated by international dishes and some stereotypes of Mexican cuisine, today considered intangible cultural heritage (Montiel *et al.*, 2019).

In this regard, there is a vast range of possibilities to promote sustainable wine culture. Current investments seek to prioritise the aspects of winery name positioning and the offer of events and activities, taking advantage of the enotourism infrastructure they have, in contrast to those activities directly linked to the dissemination of the aspects inherent to wine production.

The recreational functions of vineyards and wineries are superimposed on those which are strictly concerned with production. This makes them attractive tourist leisure and entertainment centres, creating the impression that agricultural work and production procedures are part of the appealing staging associated with viticulture. If the balance is achieved, they end up becoming excellent platforms to generate a greater wine culture, increasingly oriented towards making visitors aware of their responsibility in relation to the integral sustainability of the sector (Montiel *et al.*, 2019).

Themed festivals have not only become some of the great wineries' main attractions. In small and medium-sized wineries, the same situation occurs, but unlike large ones, in these, these events are held with greater dynamism, with a restricted influx of visitors and with an apparently more exclusive character. This reveals that a new conception of what wine tourism implies is being generated within the routes themselves.

One of the topics that appears most frequently within the stories in the promotion of the Querétaro wine route is the existence of particular edaphoclimatic conditions, a justification that is used to sustain the existence of a "high altitude" or extreme viticulture, and thereby provide a seal of identity to Querétaro wines (Montiel *et al.*, 2019). However, the territorial reference must take advantage of the other intrinsic aspects of wine culture and incorporate the existing wealth of the social, historical and cultural aspects of the region in an integral way.

The proliferation of wineries from the rise of wine tourism in the region clearly reveals that the growth of the oenological activity is correlated to the emergence, expansion and consolidation of tourism, since this has been an important support for the conversion of the wine production chain into an aesthetic experience and a cultural phenomenon, beyond its strictly financial limits.

The adaptation of the facilities for recreational purposes and the creation of exclusive spaces for recreational consumption has not been circumstantial, rather intentional, since what is intended is the maximization of the tourist experience and for this to contribute towards the aspect of consumption loyalty, in addition to the consolidation of a marketing strategy (Montiel *et al.*, 2019). However, to guarantee the production sustainability and the implicit wine tourism practices, commitments related to sustainable practices must be implicit, as in the case of Baja California.



4. The Orientation of Wine Culture in Mexico

Mexico is a country of great social and demographic contrasts, and has a great diversity of experiences for tourists given the richness of the geographical areas, the availability of natural resources and its cultural, historical and religious traditions.

In terms of wine tourism, it is not a country with a solid oenological tradition, so the recreational dimension around wine has been more important than the interest in its production aspects (Contreras and Ortiz, 2018). This leads us to suppose that a greater wine culture is required as a condition for the adequate development of Mexico's wine regions.

Based on these considerations regarding tourism and wine consumption in Mexico, talking about wine culture implies taking into account the need for greater knowledge of wine in its many facets: what they are like, where they are, how they are made, since when, their evolution, properties, etc. This includes knowledge of the environment (soil, climate, landscape, etc.), the plants (varieties, cultivation systems, resistances, etc.), the limitations of the production areas, the production processes, the uses and traditions; wine, gastronomic, folkloric and artistic traditions. Additionally, it includes the importance of the crop and related activities in the social and economic development of wine-growing regions, without forgetting, of course, the environmental role of vineyards (González, 2014).

With this knowledge it is obvious that the development of wine tourism in Mexico must go hand in hand with improving knowledge of the cultural aspects of wine. The emphasis in this case falls on the historical aspects of the production areas; the liaison of wine and vine with the environment, including the respective terroirs of each area, and the promotion of the socio-economic development of the wine regions.

This reinforces the links between wine tourism and cultural tourism in general; and justifies the creation of a unified image, infrastructure, signage, training and promotional campaigns; an experience-marketing approach for the creation and adaptation of the services and/or products offered that combine the joint exploitation of artistic and cultural heritage and the enjoyment of wineries, wine and gastronomy.

In Mexico it is necessary to ensure that wine tourism routes do not generate negative alterations to the physical environment. To do this, appropriate tourist pressure must be considered to adequately serve visitors and avoid a negative result of the expectation of the wine tourism experience. This is especially important for those wineries that, in recent years, have received annual visits of between 50,000 and 300,000 visitors, as is the case of the Freixenet company in Querétaro, which is among the most visited wineries in the world.

In short, it is necessary to improve the sensory experience, reinforcing the links between wine and gastronomy and pairing, and taking advantage of the synergies of the joint marketing of products and services that generate added value for as many companies as possible in each region. All this, while spreading the message of the beneficial effects of moderate wine consumption.



5. Post-COVID-19 Pandemic Considerations for Wine Tourism in Mexico

Before the preparations for the restart of economic activities and for the activation of wine tourism activities in Mexico, it is necessary to reflect on a post-COVID-19 pandemic plan that guides the adoption of strategies that enable the safe return of its visitors and the recovery of the vigour of the wine routes.

Although there is a coincidence in pointing out that after the COVID-19 crisis a new world era with characteristics still uncertain may begin, it seems appropriate to carry out the following actions:

1. Take advantage of the opportunities offered today by digital platforms and the communication potential of social networks with the final consumer to develop a greater culture of Mexican wine and create thematic content about the characteristics of wines, landscapes, terroirs, wineries, communities, history, beauty, etc. At this time, visitors and international tourism must be aware of the initiatives that wineries are undertaking to adapt to new needs and expectations.
2. Carry out “live” digital sessions with the audiences to facilitate dialogue between the stakeholders directly related to the wine industry and the general public.
3. Act in conjunction with the academic sector and with specialists who can guide and promote research on preferences and motivations for travel in the post-pandemic context.
4. Encourage digital marketing strategies for the electronic commerce of wine and take advantage of the reopening of the different wine routes to redirect visitor and tourist pressure, in order to ensure the best safety conditions in terms of hygiene and health to be observed.
5. Take advantage of the opportunity of the recently authorized collective brand of Mexican wine (distinctive hallmark of the geographic origin recognized by Mexican legislation) created by the Mexican Wine Council to reorient the wine promotion strategy before consumers, disassociating wine from the concept of alcoholic beverage and associating it with the concept of food with nutritional and health properties for moderate consumption (Figure 3).
6. To plan for sector reactivation amongst the sector stakeholders that helps to take advantage of the existing innovation opportunities and promote the prompt recovery of wine tourism activities.
7. Agree on the health and safety protocols to be implemented in the wine tourism routes by sectors. If guarantees of non-contagion are given through hygiene and safety regulations in all phases of the wine tourism value chain, confidence will be reinforced to ensure the return of visitors and tourists.



8. Set up cooperation agreements for the entire wine tourism ecosystem to generate proposals and ideas for collaboration between hauliers, tour operators, wineries, hotels and other service providers.

Figure 3.
Distinctive Hallmark of the collective brand of Mexican wine



Fuente: Consejo Mexicano Vitivinícola

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Wine Tourism in New Zealand

Joanna Fountain

Lincoln University (New Zealand)

Abstract

This chapter presents an overview of the development of wine tourism in New Zealand's expanding wine and tourism industry. The majority of wine producers in New Zealand are small or boutique in scale, and wine tourism provides an important distribution channel for wine sales and an opportunity for building brand loyalty. These developments do not come without risks and substantial financial and personnel costs; risks that are only exacerbated in the context of the global COVID-19 pandemic of 2020. To counter these issues, a case study is presented of a family owned boutique winery developing innovative wine tourism offerings at a scale that is within reach of many wine producers, highlighting the fact that memorable and successful wine tourism experiences do not have to be exclusive and expensive.

1. Introduction

Grapes have been grown and wine made in New Zealand since the mid-nineteenth century but the country's modern wine industry dates to the 1970s when the first grapes were planted in Marlborough. New Zealand's wine industry has experienced rapid development since this time. At the end of the twentieth century the country boasted 300 wineries; by 2019 there were 716 wine producers across ten major wine regions (New Zealand Winegrowers, 2019; p.47). While New Zealand represents less than 1 % of global wine production, its premium wines are gaining a strong reputation, particularly Sauvignon Blanc and Pinot Noir, the former constituting 86 % of the country's wine exports (New Zealand Winegrowers, 2019; p.52).

Marlborough, located at the top of the South Island, is the largest and best known region in the country, particularly for Sauvignon Blanc. In 2019 the region was responsible for 76 % of New Zealand's total grape tonnage. The second largest region, Hawkes Bay, has a longer history of wine making but is a fifth the size in terms of vineyard area, and responsible for 9 % of grape tonnage in 2019 (New Zealand Winegrowers, 2019; p.49). Being considerably further north and warmer, this region is able to produce some fine Syrah, Bordeaux-style blends and Chardonnay. These two wine regions have traditionally dominated production, but other smaller regions are developing a strong industry presence based on premium wine. Central Otago –a region located at the south of the South Island– has a global reputation for its Pinot Noir (Fountain and Dawson, 2014), while the North



Canterbury region is gaining national attention for a Burgundian-style of the varietal, alongside its existing reputation for Riesling (Hill and Fountain, 2019). Nelson, Gisborne, Wairarapa, Bay of Plenty, Northland and Auckland round out the regions (see Figure 1).

Most production in New Zealand remains relatively small scale, with 87 % of wineries classified as small producers (defined as annual sales less than 200,000 litres per year). Over the past decade there has been some consolidation of ownership into the hands of a few large global wine and alcohol companies, with the number of large wineries (those with sales over two million litres per year) increasing from six wineries to 19 between 2010 and 2019 (New Zealand Winegrowers, 2019; p.47). Evidence of consolidation is difficult for the average consumer to notice, as new owners frequently retain the original winery name and branding.

Figure 1.
New Zealand wine regions



Source: New Zealand Winegrowers (2019) (with permission).

For small operators, in particular, wine tourism is critical to the development of brand recognition and brand loyalty, and is an important sales outlet for wine (Fountain *et al.*, 2008), however it also comes with risks, and with a range of costs (time and money). This chapter outlines the development, size and scope of the wine tourism experience in New Zealand, and presents a case study of a successful and innovative wine tourism experience which demonstrates that wine tourism involvement does not have to be large scale or expensive to be successful.



2. An Overview of Wine Tourism in New Zealand

This section provides an overview of the context in which wine tourism experiences have developed in New Zealand and the types of wine tourism experiences on offer. This is followed by a summary of data on the characteristics and motivations of wine tourists in the country, utilising industry and academic research.

2.1. Development and Characteristics of Wine Tourism in New Zealand

Wine tourism first occurred in New Zealand in the 1970s, concurrent with the development of the wine industry. It has evolved with the expansion of the wine and tourism industries in the decades since. Cellar door sales were legalised in 1976, alongside changes to legislation that enabled wine to be taken into cafés (Baird and Hall, 2014). This legal change, coupled with the needs of smaller winegrowers who lacked industry support and distribution to increase sales, saw wine tourism increase (Baird and Hall, 2014).

Most early opportunities for consumers to experience wine tourism occurred by visiting ‘cellar doors’ (known elsewhere as tasting rooms) located at a winery in a wine region. These experiences still dominate today. While the term might suggest visits to wine cellars deep underground, relatively few wineries in New Zealand have these. Initially guests were welcomed to fairly inauspicious rooms or offices attached to wineries or private homes. Since the late 1990s, more wineries have purpose-built premises for visitors, often developed at the same time as the winery was established. Depending on the scale and ownership structure of the business, these premises may be visually and architecturally impressive, marked out by attractive entry statements, landscaped gardens, and purpose built tasting rooms offering panoramic views over vineyards. Many smaller wine producers still rely on the office attached to an existing building or may welcome guests to more rustic and small scale purpose-built facilities (Figure 2) (Fountain, 2017).

Figure 2.

Very different cellar doors (Georgetown, Central Otago; Pegasus Bay, North Canterbury)



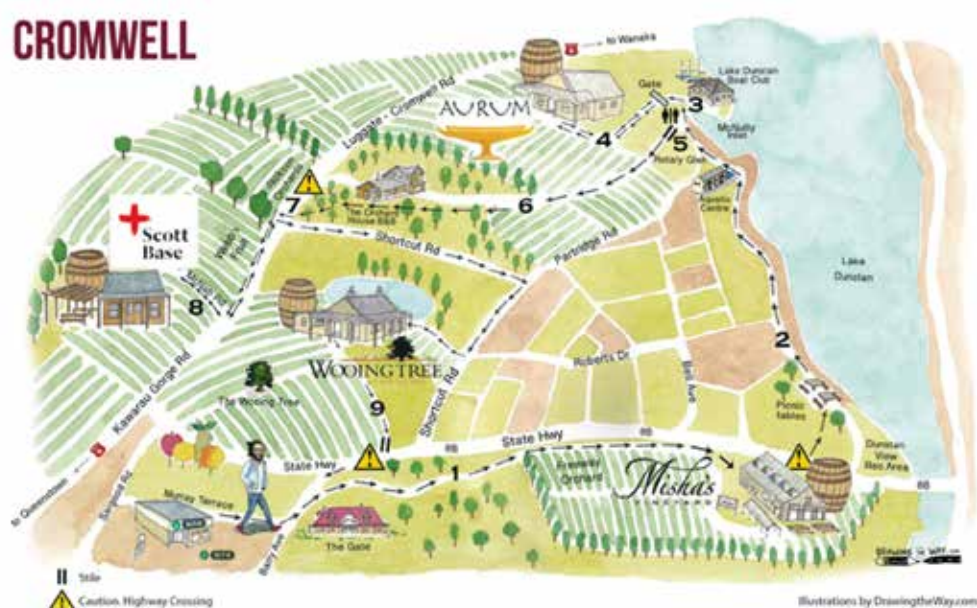
Source: Author.



Generally, a visit to a winery in New Zealand does not include a tour of the winery premises – for example, cellars, barrel rooms, and perhaps wine making facilities – as a matter of course. While larger establishments may have a tour available, this is usually an ‘add-on’ experience for which there is a charge, ranging from a modest amount (\$ NZ10) to in excess of \$ NZ100. Often the size of the venture – and the number of available staff – restricts the opportunity for winery tours, but regulatory requirements around occupational safety and health are also a consideration (Fountain, 2017).

While winery tours may not be an option, many wineries offer opportunities to combine wine tasting with food consumption. Winery restaurants and cafes are relatively common in New Zealand, and some winery premises include areas for picnics, either with food purchased on-site or brought from home. Opportunities for specific experiences of wine and food matching are increasing also, and a number of wine producers collaborate with neighbours to provide walking or cycling trails around the region, with the 4 Barrels Walking Wine Trail in Central Otago a recent addition (4 Barrels Walking Wine Trail, n.d; see Figure 3).

Figure 3.
4 Barrels Walking Trail, Central Otago



Source: 4 Barrels Walking Trail (with permission).

The many wine-related events and festivals held annually around New Zealand is another important element of the wine tourism experience. These events are primarily held in the wine regions themselves, although some are held in the cities neighbouring wine regions. While some of these events are exclusively focused on wine, more often events and festivals provide an opportunity for wine to be experienced alongside food, music and other activities. The two most famous wine festivals in the country are arguably the Marlborough Wine and Food Festival and Toast Martinborough.



Wine tourism occurs in all ten wine regions of New Zealand but the level of development and degree of involvement by wineries varies by region. Research conducted in 2017 by New Zealand Winegrowers, the national industry body, shows that there are 279 wineries in New Zealand offering more than 400 wine tourism experiences (Nicholson, 2018; p. 14). These offerings can be viewed on a newly-developed 'visit' wine tourism portal on New Zealand Winegrowers' website (New Zealand Winegrowers, 2020). A tally of the experiences offered through this portal suggests the proportion of producers engaged in wine tourism ranges from 48 % of wineries in Nelson (or 20 of 42 wineries) and 37 % in Central Otago (50 of 135 wineries), to 23 % of wineries in Marlborough (or 35 of 150 wineries), although these opportunities may be somewhat reduced by the COVID-19 pandemic (see below).

Interest in wine tourism is increasing in the New Zealand wine industry. A survey of wine producers in the North Canterbury wine region in 2018/19 found that 43.8 % of respondents were involved in wine tourism, with 29.3 % of respondents indicating that their wine tourism involvement had increased significantly in the previous two years. Two-thirds of respondents (68.5 %) reported that they planned to increase their involvement in wine tourism in the next two years; a figure including six of the nine respondents not currently involved in wine tourism (Fountain, 2019). The findings of this survey are supported by anecdotal evidence from individual wine producers around the country seeking to capitalise on significant tourism growth over the last decade.

2.2. Wine Tourists in New Zealand

As the wine industry is demonstrating more interest in wine tourism, so too are the international and domestic visitor markets. One of the challenges of analysing consumer engagement in wine tourism in New Zealand is an inconsistency of definition and difficulty of measurement. Tourism New Zealand defines wine tourists as "international visitors, aged 18 years and over, who participate in some form of winery visit at least once while travelling in New Zealand" (Tourism New Zealand, 2014a; p.1). This is problematic, as it is widely acknowledged that a majority of visitors to wineries in most New Zealand regions are domestic tourists and local residents. For example, Alonso, Fraser and Cohen (2007) found almost two thirds (61.3 %) of winery survey respondents were New Zealand based and 35.3 % international visitors; a similar finding to a 2015 survey of winery managers who estimated that domestic tourists constitute 58 % of winery visitors (Baird, 2019). Another issue with this definition is that it limits 'wine tourism' to winery visitation –excluding a range of other wine tourism activities– and does not account for the motivation for the winery visit, which may have little to do with wine.

Acknowledging these limitations, a report in 2014 suggested an average of 220,000 international tourists visited wineries for each of the previous five years (Tourism New Zealand, 2014a). Wine tourism participation has increased since this time, reflecting a growing interest in food and agritourism more generally. Recent research by Tourism New Zealand suggested 25 % of the country's international tourists visit vineyards and wineries, compared to 13 % four years earlier (Tourism New Zealand, 2017). This equates to approximately 712,000 international winery visitors (Nicholson, 2018; p. 13). As Tourism New Zealand (2014a) and Baird and Hall (2014) acknowledge, there is considerable variation in the visitor profile between wine regions, as well as at the individual winery level. For example, Central Otago is one of the few regions in New Zealand where international wine tourists outnumber domestic wine tourists (Ministry of Economic Development, 2009), an observation



supported by findings from a 2015/6 winery survey which found two-thirds of winery visitors were international tourists (Thompson and Fountain, 2017).

The profile of wine tourists visiting wineries between 2009 and 2013 suggests key international wine tourist markets are Australia, USA and UK (New Zealand Tourism, 2014); a finding reflected at the regional level in Central Otago (Thompson and Fountain, 2017). The past five years has witnessed substantial growth in the Chinese interest in wine tourism, so that a survey of Chinese visitors (including holidaymakers and international students) in Auckland and Queenstown found 42.9 % would be visiting a winery on their trip to New Zealand (Fountain, 2018). Most research is in agreement that wine tourists in New Zealand are more likely to be female (Nicholson, 2018; Thompson & Fountain, 2017; Baird, 2020), highly educated (Thompson and Fountain, 2017), and high spending (Tourism New Zealand, 2017). There is less consistency in the age of the 'typical' wine tourist, but there maybe a bi-modal distribution, with international visitors generally younger than domestic visitors (Thompson and Fountain, 2017).

3. Evolution of Wine Tourism - Models and Drivers

If one looks at the history and development of wine tourism in New Zealand arguably wine production heritage lags centuries behind most wine regions in Europe however, wine tourism is more developed here; a situation found in other 'New World' wine regions (e.g. Australia and United States). There are a number of reasons for this situation, including the relatively short history of wine production, the boutique nature of many winery businesses, and a supportive legislative framework for wine tourism development. The growing importance of international tourism in the country and the existence of supportive and collaborative networks has also facilitated the development of this sector.

An important factor in the development of wine tourism in New Zealand is the wine industry emerging alongside a growing appreciation of the value of tourism, and particularly international tourism, to the national economy, so that wine tourism was able to capitalise on increasing tourist flows. Statistics presented above indicate that the most developed and well known wine tourism destinations in New Zealand are not necessarily the largest, or arguably most well known, wine regions. For example, the Central Otago wine region benefits by being located near the major tourist destinations of Queenstown and Wanaka, while Waiheke Island has strong wine tourism development due to its location close to the major city and tourist entry point of Auckland. Their location, coupled with highly attractive natural and cultural environments and a dominance of small boutique producers, means wine tourism is an attractive option for wine producers in these regions (Baragwanath and Lewis, 2014; Fountain and Thompson, 2019).

The local wine industry also developed alongside growing recognition of the importance of creating memorable tourism experiences, rather than merely providing good service (Pine and Gilmore, 1999; Quadri-Felitti and Fiore, 2012). This has meant wineries have had to consider more than "the pragmatic considerations in purchasing wine" when establishing tourism attractions (Chen *et al.*, 2016; p. 189). While wine tasting and opportunities to buy wine remain important motives for wine tourism, numerous



researchers have highlighted the role of social, hedonic and educational experiences in wine tourism (e.g., Bruwer and Alant, 2009; Charters *et al.*, 2009; Pikkemaat *et al.*, 2009). This recognition means wineries in New Zealand do not offer only wine tasting at their cellar doors, but food, accommodation and other activities. In fact, reports suggest that the most visited pages on New Zealand Winegrowers' wine tourism site are the dine and stay options, rather than tasting (or 'sip') options (Nicholson, 2018; p.14). As Keri Edmond, the organisation's wine tourism manager reflects, this demonstrates "the wine tourist is wanting a WINE+ experience whilst visiting our wineries" (cited in Nicholson, 2018; p, 14).

While wineries of every size participate in wine tourism, the motivations of different producers vary considerably. It is generally acknowledged that cellar door sales are particularly important for small scale wine operations, which is the characteristic of the majority of wine producers in New Zealand. Cellar door operations provide not only a distribution channel, but an opportunity for producers to share their processes, stories and history with consumers, and to educate and build brand loyalty based on provenance. While corporate producers are likely to view wine tourism as a source of publicity and public relations, for many small producers growing and producing wine is driven by passion, rather than profit, and wine tourism offers an opportunity to share and talk about one's wine (Dawson *et al.*, 2011). For other more profit-driven producers who lack the scale of production or distribution supply chains to appear on the shelves of supermarkets or liquor stores, direct sales via winery visits becomes an important option.

The development of a wine tourism network, or an organisation in a region committed to facilitating and promoting wine tourism, is often an important component in the success of regional wine tourism (Mitchell and Schreiber, 2006). At a national level, such organisations can offer funding and/or strategic direction for the industry, while at a local level, networks share advice and knowledge and are often involved in establishing and promoting wine routes or trails and arranging events and festivals. In New Zealand, during the 1990s, most networking or coordination of wine tourism activities was due to the efforts of local champions in the regions, and strong regional wine associations remain an important factor in the successful development of wine tourism (Mitchell and Schreiber, 2006). There is evidence in some regions of an increasing professionalism in wine tourism marketing and development. For example, the North Canterbury Winegrowers Association has commissioned a marketing organisation to develop and promote their annual wine festival and to run other events in the neighbouring city of Christchurch.

Many countries and regions of the world are turning to food (including wine) tourism as a tool for regional regeneration and economic diversification (Everett and Aitchison, 2008; Hjalager and Richards, 2002). Tourism New Zealand recognises wine tourism as an important niche market segment and has developed a partnership with New Zealand Winegrowers to collaborate to promote the country as a visitor destination and producer of exceptional wines (Tourism New Zealand, 2014b). At a regional level, close to half of the regional tourism organisations in New Zealand promote wine tourism opportunities in their region, through products and visual imagery of vines and wineries. The following section outlines a case study from a small North Canterbury winery that deliberately chose to pursue direct cellar door sales rather than the export market as a distribution channel, and has, over the course of a few years, increased their offerings to meet some of the challenges of sustainable wine tourism.



4. Innovative and Sustainable Case of Wine Tourism

Terrace Edge is a boutique family-owned and operated vineyard and winery located in Waipara, in the North Canterbury wine region, approximately an hour drive from the South Island's largest city of Christchurch. Bruce and Jill Chapman rather spontaneously bought a former sheep farm on their way home from a family holiday in 1999 with the goal of developing an olive grove and vineyard, which they have subsequently achieved (Terrace Edge, 2020). The property spans 30 hectares, approximately 14 hectares of which are under vine. There is also five hectares of olive trees for olive oil (Country Calendar, 2019).

The vineyard is certified organic, and in 2018 Terrace Edge was awarded New Zealand's Organic Vineyard of the Year, to add to the many awards and medals for their wine (Fletcher, 2018). The Chapmans grow a range of grape varieties on their land, including the region's staples of Pinot Noir and Riesling. They also take advantage of a steep, north facing block which is 3-4 degrees Celsius warmer than the remainder of the vineyard to grow Syrah, a variety difficult to ripen in this region. They are experimenting with other grapes including Albariño, with considerable success (Country Calendar, 2019).

Alongside the development of their successful wine and olive operations, over the past decade, Jill, Bruce and son and daughter-in-law Peter and Alanna have made a deliberate choice to scale up their wine tourism offering from 'wine tasting' to a 'wine tourism experience'. For a family business, this decision represents a considerable risk, and substantial commitment of time and money to the endeavour. Back in 2013, Terrace Edge was similar to many small winery businesses: there was a cellar door where tastings could take place, but it was open limited (and sometimes, irregular) hours. The tasting room was a small, basic space, primarily consisting of a counter where wines could be tasted and purchased. Visitors could sit on the lawn outside to have a picnic and enjoy the views of river terrace and mountains, however, the winery did not fully capitalise on this setting.

Even at this time Terrace Edge was engaging directly with consumers in other ways, so that they had something of a loyal market base. The winery has always been an active participant in a range of events and festivals organised by the local winegrowers association and other organisations in the region, including the regional wine and food festival (currently known as the North Canterbury Wine and Food Festival) and a collaborative event with local food producers called 'Forage North Canterbury'. Terrace Edge had also presented their wines and story at events in Christchurch, including 'Taste Waipara Valley' events, and the South Island Wine and Food Festival. For several years, they sold their wine at a weekly farmers market in Christchurch. Since 2011, Terrace Edge has hosted an annual vineyard event to coincide with harvest which enables visitors to come and experience the grapes and wines of Terrace Edge while taking a tour of the vineyard. Initially 'Harvest Weekend' and now "Wines amongst the Vines" this event costs \$ NZ25 per person for a 1.5 hour tour which gives a 'behind the scenes' appreciation of the work that goes into growing and making wine, whilst also allowing the visitor to soak in the 'winescape'.

Around 2015, the two generations of the family began considering options to expand the visitor experience and made a deliberate choice to focus on wine tourism as a distribution strategy, rather than export markets (*pers. comm.*). The initial stages of this transformation were physical; they expanded and redesigned the cellar door, with seating areas inside and out, including a bar along the windows facing the property where visitors could drink in the view along with their wine. The opening of this new tasting room coincided with the introduction of ‘gourmet toasties’ – toasted sandwiches, with an array of seasonal fillings including braised beef and sticky pork on ciabatta bread. The inclusion of these very fairly priced food options meant it was possible for Terrace Edge to apply for a liquor license allowing the winery to sell wine by the glass, while not committing to an extensive, or expensive, menu where wastage can be a significant problem. The family have continued to innovate since this time. Most recently, in August 2019, the winery introduced a ‘Food and Wine Experience’ (Figure 4). In a region where tasting fees are relatively rare, this food and wine pairing sees visitors enjoy a seated tasting of canope-sized food creations matched with five wines for a \$ NZ20 charge (Terrace Edge, 2020). This activity has proven very popular, with people coming back more than once for the experience.

Figure 4.
Wine and food experience



Source: Terrace Edge (with permission).

While each of these offerings and activities alone may not seem innovative, as a small, family-owned winery, Terrace Edge has proven that big (and expensive) is not always better. By focusing on the unique selling propositions –they have a personal family story, a beautiful setting and fine wines, and pairing that with food and educational offerings–, they have managed to create a suite of activities that is affordable and approachable for wine interested consumers. The success of their endeavours means that they are ranked as the number one attraction in Waipara, up against much



larger, grander, and better funded ventures, and are frequently listed as a ‘must visit’ attraction in the region, described recently as “a lovely little secret, whose name is whispered into your ear by your best friend forever” (Khoo, 2019). Their ability to be nimble and innovative means that as New Zealand came out of COVID-19 lockdown they were one of the first wineries to reopen, offering seated tastings for a \$ NZ10 charge to enable appropriate physical distancing. Now, with many wine tourism facilities still closed as a consequence of the global pandemic and a difficult road ahead for many businesses, Terrace Edge have positioned themselves as well as possible to meet the coming challenges head on.

5. Challenges

There are a range of challenges facing the sustainability of wine tourism in New Zealand, and compliance and legal issues that at times limit scope for innovation. At the time of writing, the biggest challenge facing the sector is the profound impact caused by the COVID-19 global pandemic. In New Zealand, fears of an exponential growth in cases of the virus resulted in a very extensive lockdown of the country and most of the economy over a two month period. These measures have also included the closure of the country’s borders to all but returning citizens and permanent residents. While these strict lockdown measures have halted community transmission of the virus, the need to keep strict controls on borders means it will be months, if not years, before international borders reopen, so that the wine industry will need to rely on domestic visitors. There is potential in this market, however, as domestic visitors have traditionally made up half of all winery visitors, and New Zealanders have emerged from this period of lockdown with a desire to strengthen the national and regional economy by ‘supporting local’ in food and drink and tourism experiences (see ‘*Could food and drink save the tourism industry?*’, 2020).

Putting these issues aside, there are other ongoing challenges facing the sustainability of wine tourism in New Zealand. Many of these originate with the small-scale and limited resources (time, money and personnel) of many wine producers (Dawson *et al.*, 2011). This includes the location of wine regions in relation to visitor markets, the size and capacity of the winery and the priorities of the business. Some small wineries operate with very few employees and may struggle to commit to staffing a cellar door full time if immediate returns are low. Other wineries that specialise in only one wine style or have very small production levels may not be able to provide wine tourists with the experience they are expecting, which may involve tasting many wines. Therefore, wine tourism is not an option for all wineries (Fraser and Alonso, 2006).

Many wineries focus their energies on exporting a significant proportion of their wine, so the domestic market and cellar door sales are not viewed as significant (although this attitude seems to be changing). There is also awareness that there must be a ‘critical mass’ of wineries in a region open to the public, and supporting facilities and attractions, such as restaurants, accommodation and other activities, for a wine region to become a wine tourism destination. The peripheral location of most of the country’s wine regions away from large population bases causes additional issues and costs with accessing visitor markets. Adding to these difficulties, many wine producers have limited knowledge of the tourism industry, and are faced with a myriad of liquor licensing and compliance costs (Bell, 2012), despite ongoing but unsuccessful efforts by the national winegrower association to simplify these, particularly in light of the challenges faced by wineries during the global pandemic (Gregar, 2020).



While food options add to the experiences of visitors, for wineries food provision is often a response to liquor licensing laws which requires food to be served if wine is to be sold and consumed onsite by the glass or bottle, and this too can be an investment with limited financial returns. However the success of the wine tourism experiences offered at Terrace Edge have shown that it is possible to develop memorable wine tourism experiences on a modest scale with considerable success, by connecting with their consumers (through festivals, markets, and vineyard events), creating accessible and affordable food and wine matching experiences, and collaborating with the regional winegrowers association in events and marketing activities.

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Wine Tourism in the USA

Liz Thach

Sonoma State University (California, USA)

Abstract

This chapter analyses the US market in terms of wine tourism. Specifically, this chapter provides an overview of the major wine tourism regions, players, statistics, and the major models used for wine tourism. This is followed by two examples of sustainable and innovative wine tourism in the US: Honig Winery in Napa Valley and the Sonoma County Winegrowers. The chapter concludes with a list of the challenges and potential solutions to enhance US wine tourism in the future.

1. Introduction

As the fourth largest wine producer in the world, the United States (US) has been active in the realm of wine tourism for over a century now. According to Paul Lukacs (2000), author of *American Vintage*, wealthy people from San Francisco would make trips to visit and purchase wine at Buena Vista winery, established in 1857 outside the town of Sonoma, and Charles Krug winery, established in 1861 in Napa Valley. Today wine tourists have many more choices, because all 50 states now possess wineries. The story of wine tourism in the US is one of both challenges and successes, shaped in many cases by changing regulations, economic fluctuations, shifting social trends, and more recently by crises, such as floods, wildfires, earthquakes, and pandemics.

This chapter tells the story of wine tourism in the US, and how despite challenges, the industry has managed to find innovative solutions to assist them in creating sustainable businesses that can be handed down to future generations. It begins with an overview of the major wine tourism regions, players, and statistics. This is followed with two examples of wine regions which have set and achieved admirable goals in sustainability through use of innovative methods. Finally, a list of the challenges currently impacting US wine tourism are presented, along with potential solutions to overcome these issues.



2. Main Figures of Wine Tourism in the US

By the year 2020, there were 10,476 wineries in the US (Kodorov, 2020). Of these, 8,922 were bonded wineries with a federal license to produce wine on the premises, whereas 1,554 were deemed virtual wineries, which must contract with a bonded winery or custom-crush facility to produce wine. All types of wineries can own their own vineyards, as well as purchase grapes or bulk wine in order to produce finished wine for sale to consumers.

2.1. Major Wine Producing States in the US

Though all fifty states produce wine, California dominates with 4615 wineries producing 81 % of all US wine (Wine Institute, 2020; Kodorov, 2020). The next largest state is Washington with 812 wineries; followed by Oregon with 809 wineries; New York with 411 wineries; and Texas with 406 wineries (see Table 1).

Table 1.
The Largest US Wine Producing States

State	Number of Wineries
California	4,615
Washington	812
Oregon	809
New York	411
Texas	406

Source: Kodorov (2020).

2.2. Major Wine Tourism Organizations

In the US very little funding is provided on a federal basis for wine tourism. Therefore, there are a variety of national, state, and regional wine associations, as well as individual wineries, that have established within their role the ability to promote US wineries in order to attract tourists. The following paragraphs describe how these organizations operate.

- *Wine America*: With its goal to encourage the growth and development of American wineries, Wine America is a national wine industry association that focuses on wine public policy (Wine America, 2020). Therefore, they lobby in Washington D.C. for the rights of US wineries. However, they are primarily self-funded through membership dues and any grants they apply for and receive. Currently they have about 500 winery members. In 2017, Wine America



sponsored an impressive research project that illustrated the US wine industry attracted 13 million wine tourists that spent \$ 17,659,642,500 (Dunham, 2017). The report includes specific wine tourism data from all 50 states, and also shows that the total economic impact of the US wine industry was more than \$ 219.9 billion.

- *California Wine Institute*: Due to its large size, California has created its own government lobbying organization called the *Wine Institute*, based in San Francisco. With over 1000 wineries, they are also primarily funded via winery membership dues and grants, but they also advocate at both the state and international level, as well as federally in Washington DC. Their mission is to “initiate and advocate public policy that enhances the ability to responsibly produce, promote, and enjoy wine (Wine Institute, p.1)”. The Wine Institute also has an international market development department that helps to promote California wine abroad, thus participating in wine tourism for the state of California. In addition, they offer research and educational programs. The Wine Institute also funded a research project showing that in 2015, 23.6 million tourists visited California wineries that year, generating \$ 7.2 billion in annual tourism expenditures, and achieving \$ 57.6 billion in economic impact (Dunham, 2015).
- *Regional Winery Associations*: The vast majority of wine tourism strategy and marketing in the US is managed by the regional winery associations. These, again, are primarily funded by individual winery dues and grants. Depending on the size of the wine industry in the state, these may be either state organizations, such as the *Tennessee Farm Wine Grower's Alliance*, where Tennessee has only 65 wineries in the state, to larger wine states which have both regional and state-wide winery organizations. For example, Oregon, which has 809 wineries, has a very strong state organization called the *Oregon Wine Board*, which has a mandate to offer marketing, research, and educational initiatives to advance Oregon wine, but Oregon also has a number of regional associations (Oregon Wine Board, 2020). These include, amongst others, the Southern Oregon Winery Association, the Willamette Valley Wineries Association, and even very small specific appellations (AVA – American Viticulture Areas), such as the Dundee Hills Winegrowers Association, which is actually within the larger Willamette Valley AVA.

In California, the role of regional winery associations is even more complex, given the very larger number of wineries in the state and 139 individual AVAs, out of a total of 242 AVAs in the US (TTB, 2020). Here each major wine region has its own association, such as the *Napa Valley Vintners* and the *Sonoma County Vintners*, but also the grape growers within each of these regions may have their own organization, such as the *Napa Valley Grape Growers* and the *Sonoma County Winegrowers*. Furthermore, many of the individual AVAs within each region will have their own, often very powerful, winery association that assists wineries in marketing their wine, offering educational programs, and promoting wine tourism within the AVA. Examples include the *Rutherford Dust Association* and the *Oakville Winegrowers* in Napa Valley, and the *Russian River Valley Winegrowers* and the *Alexander Valley Winegrowers* in Sonoma County. Fortunately, many of these associations make attempts to work in partnership with one another so that together they can promote the whole region and encourage wine tourists to visit.



2.3. Wine Marketing & Sales Models in the US Market

Most US wineries create marketing and sales programs to promote their wine brands and to attract tourists to their tasting room so they can sell wine direct to consumer (DTC). They also sell wine to distributors who have access to retail accounts across the fifty states, and therefore can resell their wine to on-premise wine retailers, such as restaurants, bars, and hotels, as well as off-premise wine retailers such as grocery stores, discount stores, wine shops, and other sales venues.

Due to Prohibition of alcohol in the US from 1920 to 1933, the US government has advocated the 3-tier system as responsible method for selling alcohol; however, each individual state is allowed to set up its own regulations on how this is implemented. The 3-tier system suggests that wineries, as suppliers, should produce the wine (first tier) and sell it to distributors/wholesalers (second tier), who in turn will sell it to both on and off-premise retailers (third tier). Approximately half of the US states have adopted this system, so wineries are required to go through distributors if they want their wine to be placed in certain restaurants, bars, wine shops, grocery stores, and discount retailers across the US. However, some states, such as California, allow wineries to sell directly to retailers. Given this complex maze of laws and regulations, there are four major sales channels for US wineries to use. These include:

- 1) *Distributor to Off-Premise Accounts*: approximately 75 % of the wine volume is sold this way in the US market, primarily through large grocery stores and discount chains, such as Safeway, Albertsons, and Costco (Brager, 2020).
- 2) *Distributor to On-Premise Accounts*: approximately 15 % of wine is sold in restaurants, wine bars, and other on-premise establishments.
- 3) *Winery Direct to Consumer (DTC)*: approximately 5 % of US wine is sold directly to consumers who visit tasting rooms, attend winery events, and/or purchase wine online from winery websites or wine clubs. Wine tourism is very important for this channel.
- 4) *Export and/or Direct to Trade*: approximately 5 % of US wine is sold via export, or direct to retailers/trade in the few states that allow this.

3. Evolution of Wine Tourism in the USA

Today wine is produced in all fifty US states, with most wineries operating as small family businesses, and very much reliant on tourists visiting their winery in order to sell winery direct to consumers (DTC). Of the more than 10,000 wineries in the US, the top 50 producers hold more than 90 % of domestic market share (Penn, 2020), selling primarily through distributors to on/off premise channels, such as grocery stores, wine shops, restaurants, and bars. This illustrates why the rest of the small wineries need to focus on wine tourism, and indeed, depend on it for their livelihood. Since they do not produce a large volume of wine, they primarily sell in local markets, to tourists visiting their wine region, and –with a few exceptions– to carefully selected on/off premise accounts. They have had to adapt to new



and creative ways to sell wine direct to consumers (DTC), and many have adopted the six major DTC wine sales channels for wine tourism in the US market.

There are six major methods to sell wine direct to consumer (DTC) in the US, and most of them are dependent on tourists visiting the winery first. Therefore, wine tourism is a critical success factor for DTC wine sales. The six methods are:

- 1) *Tasting Room Sales*: also referred to as cellar door and cave sales in other countries, small US wineries who do not have the volume or the reputation to attract distributors, are primarily reliant on attracting visitors to their tasting room and selling them wine. They use a variety of marketing methods to make this happen including traditional and online advertising, partnerships with tour operators and hotels, social media, and participating in regional association wine tourism advertising efforts.
- 2) *Special Events*: many wineries will host special events throughout the year at their winery location, and/or collaborate with other wineries to create a regional festival. Examples include the Finger Lakes Wine Festival in New York, the Texas Hill Country Wine and Food Festival, and the annual Lobster and Wine Dinner on the Green at Mumm Winery in Napa Valley. These events bring many visitors who will purchase wine and help support the local economy.
- 3) *Wine Clubs*: probably the most profitable DTC channel, wine clubs started in the US in the early 2000's when legal regulations were changed that allow wineries to ship wine directly to consumers in other states. Before this, visitors had to purchase wine at the winery and take it home with them. Wine clubs are free to join, but the consumer provides a credit card and agrees to allow the winery to ship them wine several times per year – generally at least once every three months – and it is charged to their credit card. In return, the consumer is invited to special events at the winery, receives discounts on additional wine orders, and is allowed to bring up to three friends to taste at the winery for free. Most consumers really enjoy wine clubs and will stay in one club for an average of 30 months (SVB, 2019), generating a large amount of sales for the winery.
- 4) *Mailing List and Allocation*: If a visitor does not want to join a wine club, he/she will be invited to be on the winery's mailing list. In this way, they can receive the winery newsletter, as well as other information about special discounts or events at the winery. An allocation method is used by luxury wineries that have a strong reputation and a limited amount of wine. Instead of having a wine club, customers will be invited to sign-up on a waitlist, and may have to wait for years in order to be allowed to purchase a small allocation of wine once or twice a year. There are no discounts – just the prestige of being allowed to purchase a very special and expensive bottle of wine. Examples of US wineries that use the allocation method are Screaming Eagle, Harlan Estate, Kosta-Browne, and Kistler.
- 5) *Telemarketing*: though not used that frequently, some wineries will telephone consumers who have visited their tasting room in the past and offer to sell them wine over the phone. Often these consumers will be wine club or mailing list members.



- 6) *Ecommerce*: selling wine online from the winery directly to consumer has been growing slowly in the US. Here wineries use online advertising and social media to attract consumers to their websites to purchase wine. The winery then ships it directly to their house. Often wine club members will purchase additional wine this way, and encourage friends and family to purchase wine online. During the COVID-19 crisis, when all winery tasting rooms were forced to close, many wineries were able to reach out to wine club and mailing list members to offer virtual tastings and discounts on wine purchases. This caused winery ecommerce to increase during this time, and many wineries learned new methods to digitally market wine and use virtual wine tours and other methods to encourage online wine tourism.

4. Innovative and Sustainable Cases/Stories of Wine Tourism

4.1. Defining Sustainability in the US Wine Industry

In the US wine industry, the term ‘sustainability,’ has been linked to the concept of the Triple Bottom Line, which includes winegrowing methods that are environmentally friendly, socially equitable, and economically viable (Wine Institute, 2003; Golicic *et al.*, 2016). Also referred to as the 3E’s –environment, equity, economics, or the 3 P’s– planet, people, and profits, many US wine sustainability certifications are based on these concepts, though some only focus on environmental aspects. Table 3 illustrates a list of some of the most common eco-friendly wine certifications in the US and internationally.

Table 2.
Partial List of “Sustainable” Wine Certifications

US Based	International
<ul style="list-style-type: none"> • CSWA – California Sustainable Winegrowing Alliance • Napa Green • Fish Friendly Farming • USDA Organic Grape Certification (EcoCert) • USDA Organic Wine Certification (EcoCert) • Lodi Rules • SIP – Sustainability in Practice (Central Coast of CA) • LIVE –Low Input Viticulture & Enology (Oregon based) • LEEDS Certification • California Green Business Program 	<ul style="list-style-type: none"> • Demeter – Biodynamics • FairTrade Wine • New Zealand WineGrowing Program • South Africa Integrated Wine Production System • Australia’s Wine Industry Stewardship • United Nations Environmental Program • International Wine Industry Greenhouse Gas Accounting Protocol • ISO 14001 Environmental Management • FIVS Global Wine Sector Environmental Sustainability • Integrated Agriculture in Spain • Multiple European Organic Certifications

Source: Own elaboration



Most of the certifications are conducted by a third-party auditor. Wineries and vineyards must pay a fee to become certified, as well as follow-up fees annually, once certified. Costs depend on the type of certification, but the average rate is around \$ 3000 per year. Because of this, many small wineries adopt sustainability practices, but do not to become certified.

4.2. Mini-Case Study: Sustainability and Innovation at Honig Winery, Napa Valley

In the early 1960's Louis Honig had a dream to start a winery in Napa Valley, California. In 1964, he was able to buy a 68-acre vineyard planted to Cabernet Sauvignon and Sauvignon Blanc in the heart of Napa Valley's Rutherford appellation (American Viticulture Area – AVA). During the week Louis continued to work in the city, but on weekends he brought his family to Napa to enjoy the outdoors and visit the vineyard. Through the years he sold grapes to neighboring wineries, still dreaming of the day he could make and sell wine.

Unfortunately, Louis passed away unexpectedly in 1978, but his family decided to honor him by producing a small amount of Sauvignon Blanc wine from their vineyard. The wine was so delicious that it won awards. Inspired by his grandfather's passion and dream, grandson Michael Honig, aged 22 at the time, decided to take over management of the vineyard and establish Honig Winery. In the beginning, the wine was made in an old tractor barn, but through the years he was able to build a winery and a house on the property.

Michael got married and brought his wife, Stephanie, to live on the property. She assisted with wine operations, along with other family members; Regina Weinstein, Steven Honig and Raphael Cruz. Today, Stephanie and Michael have four children, and still live on the property. Together they have implemented sustainable farming practices in both the vineyard and winery and have created an innovative tour that educates wine tourists about all of the great steps they have taken to implement environmentally friendly and socially responsible practices at Honig Winery.

Adopting Sustainable Farming Practices

"Michael has always been sustainability minded," states Stephanie Honig. "This is because he grew up coming to play in these vineyards when he was a little boy, and now we live in the vineyard with our children. The land is an asset, and we need to treat it well and protect it for future generations."

Indeed, Michael Honig's interest in sustainable farming started at an early age. His grandfather explained that the name "Honig" means "honey" in German, and so Michael decided to establish honeybee hives to help fertilize native flowers and grasses on the property. He continued to learn about sustainable farming practices over the years, and in the early 2000's he was asked to help develop the California Sustainable Winegrowing Self-Assessment Process. This allowed winegrowers to assess their vineyard, winery, and people processes in order to implement improvements that helped with environmental and social equity issues.



By 2010, the self-assessment process had transitioned into a professional certification, with the California Sustainable Winegrowing Alliance (CSWA) overseeing the process with third party auditors conducting the assessments. Today, to be “Certified Sustainable,” wineries and vineyards must complete a rigorous annual assessment of 140 vineyard and 104 winery best practices using the California Code of Sustainable Winegrowing. According to the CSWA, the benefits of being certified sustainable are:

- Good for the Environment: Sustainable winegrowing preserves natural resources, improves air and water quality, and protects ecosystems and wildlife habitat.
- Good for the Community: Sustainable winegrowing helps growers and vintners be stewards of both natural and human resources, preserving open space and providing scenic landscapes and contributing to their communities economically and culturally. Sustainability also helps provide a favorable environment for employees and neighbors.
- Good for Wine Quality & Profits: Sustainable practices require in-depth attention to detail and continuous improvement resulting in high quality California wine grapes and wine. This leads to economic stability and profitability over time.

In addition to being certified sustainable by the CSWA, Honig Winery is also certified Napa Green, which is another rigorous third-party certification for both vineyards and wineries located in Napa Valley. Both Napa Green and the CSWA certifications are concerned with environmental stewardship, energy and water conservation, healthy soils, responsible pest management, solid waste management, wildlife habitat protection, air quality control, and positive working relationships with employees, neighbors and communities.

The Honig Winery Eco-Tour and Tasting Experience

“In addition to using sustainable practices to help the environment and our community,” stated Stephanie, “we believe it helps to create quality wine. Therefore, we decided to share our philosophy and methods with our customers. That is how the Eco-Tour and Tasting Experience was born.”

Stephanie explained that they started the tour in the year 2015, and it has been very popular with tourists from the beginning. Offered daily at 10:00am from March through October, weather permitting, tourists must make an advance reservation online and pay \$ 45 per person for the experience. The tour is limited to 6 people. Once they arrive at Honig Winery, they are welcomed with a small glass of Honig Classic Sauvignon Blanc wine in a glass and invited to board a 6-passenger cart, which transports them through the vineyard.

During the vineyard tour, a professional Honig hospitality representative, who has been trained in sustainable practices, shows the tourists how Honig Winery is managing and saving water use, protecting wildlife habitat, and encouraging beneficial insects, plants, and birds to live amongst the vines. Wine tourists get to view the beehives, the owl and raptor boxes, solar panels, and then stop at a look-out point over the Napa River. Here they are given a second taste of a different Honig wine and learn how Honig has restored the Rutherford Reach of the Napa River. During the 45-minute



tour, they also learn about the certification components of Napa Green and the California Sustainable Winegrowing Code. Once back at the winery, they are invited to rest at a table in the garden where they are served tastes of two more different Honig wines.

The Honig Winey Eco-Tour has been very popular with visitors. “People love it,” reports Stephanie. “And when they actually see the birds flying around, nests in bird boxes, and bee hives, and they learn how everything works together as one system to create high quality grapes that are grown in a sustainable fashion, they are quite excited. The wine in their glass means so much more to them.”

The financial results have also been very positive. Stephanie reported that many people purchase wine after the tour; some join the wine club; and many wine club members return and bring friends to go on the tour. Honig Winery is a great example of a winery that has taken their sustainability practices, which they believe in as a family philosophy, and turned them into an innovative wine tourism experience that not only educates consumers on the importance of sustainability, but makes them appreciate the high quality of the Honig wine they purchase. Honig Winery is the first winery in Napa Valley to offer such a unique wine tourism experience, but hopefully others will implement similar educational and engaging tours in the future.

4.3. Mini-Case Study: Sonoma County – Certified 99 % Sustainable

In January of 2014, the Sonoma County Winegrowers of California did something amazing. They set a goal to become a 100 % sustainably certified wine region by the end of 2019. With 60,000 vineyard acres spread over 18 AVAs (appellations) and 1800 grape growers this was an incredibly audacious goal to set, but they were able to achieve 99 % sustainability by September of 2019. So how did they do this?

The Importance of a Strong Leadership Team

It started with strong leadership amongst the executive team of the Sonoma County Winegrowers (SCW), led by President Karissa Kruse. With a mission to increase the value of Sonoma County wine grapes and nurture and protect agriculture resources for future generations, the SCW is a commission funded by a local grape grower assessment. The majority of the member vineyards are small family run operations, with some owned by multiple generations, because winegrowing was first established in Sonoma County in the 1820's.

The SCW leadership team approached their members about the 100 % sustainability goal, and found that many embraced it immediately, because they had been farming that way for decades. However, there were some outliers who did not want to be pressured to become certified, due to a variety of reasons, including the additional time and costs to do so, as well as a difference in philosophy. The SCW leadership team was able to provide grants and other financial support to those vineyard owners who needed assistance, and slowly, each year, more vineyards became certified.



A Choice in Sustainable Certification Programs

A component of the program was a choice in the certifying agency, which allowed growers to choose from four different programs: the California Sustainable Winegrowing Alliance Certification, the Lodi Rules Certification, SIP Certified (Sustainability in Practice) or Fish Friendly Farming. All certifications were equally rigorous, including a self-assessment phase, before bringing in third-party auditors to inspect and validate the certification process.

Each year the SCW created an annual report illustrating progress to date. Figure 3 shows how much progress was made each year since program inception. Beginning with 2014, only 43 % of the vineyard acres in Sonoma County were self-assessed sustainable and only 33 % certified by a third party. By 2018 they had increased to 97 % self-assessed sustainable and 89 % certified sustainable.

Sharing of Success Stories, Mentoring and Recognition

As more vineyards became certified sustainable, the owners of those vineyards would share their success stories and offer to mentor other vineyard owners who had not yet been certified. This was inspirational to many people, and some of the success stories were shared on the website and in the annual report of the SCW.

Furthermore, when a vineyard was certified they were given a sign to place next to the vineyard in recognition of their achievement (see Figure 4). This proved to be a great motivator to many people, and began to capture the attention of newspapers, magazines, trade media, and other wine regions around the world. This resulted in many published articles, and even television news programs, commenting on the amazing 100 % Sustainably Certified Goal for Sonoma County vineyards.

Positive Impact on Wine Tourism and Innovative Experiences

The many positive stories about the progress towards the 100 % sustainability goal were communicated to wine tourists, who were inspired to visit Sonoma County's more than 500 wineries. Upon arrival, not only were they impressed by the signage in vineyards about the sustainable certification, but this message was echoed in the wineries as well. Many winery tour guides and hospitality reps were trained to tell the story of the goal, as well as their own individual winery sustainability efforts. Some Sonoma County wineries, such as Benziger, Jordan, and Deloach, organized special tours to teach consumers about their sustainability efforts – similar to the tour described by Honig Winery in Napa Valley.

In addition, eight different wineries organized self-paced sustainable vineyard walks for wine tourists so they could stop by the tasting room, get a map and explore the vineyard on their own (See Figure 5). Plaques were set up in the vineyard to explain the various types of sustainable practices that were being used, such as water conservation, bird-boxes, native plants for cover crop, and other environmentally friendly practices. Also, signs explained how the vineyard trellising was designed to make vineyard work more ergonomically safe for workers.



Sustainability's Positive Impact on Sonoma County Reputation

When Karissa Kruse, the President of SCW, announced that 99 % of the goal had been achieved by September 2019, a flurry of reporters descended upon the county. There was much speculation as to who the 1 % was that was not certified, but Karissa said they would continue to persevere. In the meantime, she pointed to the many positive results the 100 % sustainably certified goal had brought to Sonoma County vineyards and wineries, including the following:

- Voted 2019 Wine Region of the Year from *Wine Enthusiast Magazine*, which encouraged many tourists to visit.
- Received the 2016 GEELA Award from California Governor Brown - GEELA means Governor's Environmental and Economic Leadership Award and is California highest environmental honor.
- Invited to be part of FIVS (the global wine, beer and spirits trade association), as part of their global sustainability committee.

According to Karissa, "Achieving the Sustainably Certified goal has brought us incredible press. It really helped our winegrape growers to be relevant in the conversation and amplified the role of farming and agriculture in the wine community and winemaking process. For Sonoma County, it gave us a seat at the table in so many ways that were unexpected!"

"Another great benefit is that the sustainable wine logo is now on over 1 million cases of Sonoma County wine! Also, I think it is playing a bigger role with tourism, as consumers and travelers want to feel good, do good and travel well!"

Indeed, according to the Sonoma County Wine Community Impact Report (2020), \$ 1.2 billion dollars is generated in Sonoma County by wine tourists annually. This helps to support 54,000 full-time employees in the Sonoma County wine industry earning \$ 3.2 billion in wages paid per year. The retail value of wines produced in Sonoma County is \$ 8 billion. For Sonoma County, being sustainable seems to reap many rewards.

5. Challenges and Potential Solutions in US Wine Tourism

Despite all of the progress that has been made in US wine tourism over the years, there are still several challenges that beset wineries. However, due to the American values of innovation and a "can do it" attitude, many wine regions are developing helpful solutions to overcome these issues, as described below.



Natural Disasters

Earthquakes, floods and wildfires have been the biggest challenge to American wine tourism in the last decade. The advent of the COVID-19 pandemic can also be considered a natural disaster. All of these events stopped tourists from visiting wine regions, causing a huge drop in regional wine sales and negatively impacting local economies as wineries were shut down, employees laid-off, and hotels and restaurants went empty.

The solution to these issues for many US wine regions has been a quick response to control negative television and online news stories by taking control of the communication and making sure the truth about the impact of the natural disasters was known. For example, the 2017 and 2019 wildfires that ravaged Napa and Sonoma counties, only resulted in a few wineries being destroyed, but the news media stories made it appear that the whole area was on fire. By taking immediate action, such as developing online videos and social media posts illustrating that most of the region was fine, they were able to control the situation and lessen the negative impact. Other solutions have been progress in developing digital marketing and other online sales methods to enable consumers to still purchase wine from wineries online during the disaster. Indeed, during the natural disasters, including COVID-19, many wine club members and other loyal consumers reached out to wineries to offer support and purchase wine.

Changing Legal Regulations

Despite the fact that many positive legislative changes have occurred that allow small wineries to ship to many more states across America, it is still not possible to ship wine directly to all 50 states. Furthermore, each state has its own rules, taxes, fees, documentation requirements, and other conditions that wineries must follow in order to be in compliance with shipping laws. This can create a lot of headaches for small wineries wanting to ship wine and/or wine club shipments to wine tourists who visited their winery in the past.

Solutions for this issue have varied, with some wineries electing not to ship to certain states because of the high fees and complications. Others have made use of the many wine shipping companies that have sprung up to assist with these issues, such as *Ship Compliant*. Wineries outsource shipping to these companies, who handle all of the compliance paperwork, fees, and the actual shipping of the wine to the end consumer. The costs are usually passed on to the consumer. At the same time, there are different wine lobbying organizations, such as WineAmerica and the Wine Institute that continue to fight legislation that hurts the ability of small family wineries to sell their wine in America.

Keep Wine Tourists Coming Back

Though many wine tourists have their favorite wine regions that they like to visit every year, there is another subset of wine tourist that want to experiment and discover new wine regions. Both types of wine tourists are desirable, but for established wine regions, such as Napa Valley and Sonoma County, the challenge is to create reasons for wine tourists to keep coming back. The high price of wine tasting in these two famous regions is also prohibitive for some younger consumers. With tasting fees averaging \$ 43 per person per winery in Napa Valley and \$ 24 in Sonoma County, versus only



\$ 13 in the rest of the US (SVB, 2019), it can be expensive to visit these areas. This is a deliberate strategy to focus on more wealthy tourists and only do tastings by appointment. They have discovered it increases revenues.

A major solution to this issue has been the development of the wine club. Once customers become wine club members, they are allowed to visit the winery as much as they like and bring friends as well. Tasting fees are waived for the basic tasting experience, and discounted for more unique experiences, such as a food and wine pairing or reserve wine tasting. Another solution is innovative events, which attract tourists back to the region to experience something new. Indeed, many famous wine regions will develop a calendar with special events planned for each month, even during the non-tourist season that usually occurs during cooler months. Examples of this include the Annual Deck the Halls Weekend in the NY Fingers Lakes wine region during the beginning of December, the Winter Wineland event in Northern Sonoma County each January, and the Crane and Wine Festival in Lodi, California in mid-November, where wine enthusiasts who also enjoy birding will flock to celebrate for the weekend. These types of events can be very successful in luring back wine tourists again and again.

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Professor Dr. Raúl Compés López

Raúl Compés López holds a PhD in Agricultural Engineering from the Polytechnic University of Valencia (UPV) and works as a professor at the UPV Department of Economics and Social Sciences. He is the vice president of the European Association of Wine Economists (EUAW), academic coordinator of the Wine Technology Platform's economics area, and an expert member of the Spanish Commission of the International Organization of Vine and Wine (OIV). He has coordinated two collective books awarded by the OIV: "Economics of wine in Spain and in the world" (2015) and "The wine sector facing the challenge of climate change. Public and private mitigation and adaptation strategies in the Mediterranean" (2019). He is the director of the study "Costs of grape production for winemaking in Spain" for the Wine Interprofessional Organization of Spain (OIVE).



Professor Dr. Gergely Szolnoki

Gergely Szolnoki was born and grown up in Hungary. After studying Agricultural Economics, he went to Geisenheim University (Germany) as a doctoral student, where he investigated the influence of wine packaging on taste perception and willingness to buy. After his PhD, Gergely remained at the Geisenheim University and specialized in consumer behaviour, communication and social media, organic wines, market analysis and wine tourism. Today Gergely works as a professor of market research and is author of several books and book chapters, more than 20 reviewed scientific papers and 90 industry articles published in English, German and Hungarian. Furthermore, he is an expert delegated by the German Federal Ministry of Food and Agriculture to the International Organisation of Vine and Wine (OIV) in the fields of "wine economy" and "statistics".

