

Wine and Food Tourism
First European Conference
Volterra, April 11-13 2011

editors

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The First European Conference on Wine and Food Tourism was held in Volterra (April 13-15, 2011) in the SIAF (Scuola Internazionale di Alta Formazione) structure. It represented a unique opportunity to discuss the wine and food tourism development in an international and multidisciplinary perspective.

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Welcome Addresses by Giampaolo Pioli

President of Città del Vino

Ladies and Gentlemen,
Mr President,

A mother tongue would probably say something more like: On behalf of the official partner, the Italian Città del Vino National Association and of more than the 550 associated Communes, it is my pleasure to welcome you to this Conference.

Our association, through its own Communes, represents 4/5 of viticultural lands with the denomination of origin for about 200.000 hectares of vineyards, for 24 years has carried on the reflexion and the search upon the great theme of the relationship between, on the one hand, quality wine production and eno-gastronomic excellence, and on the other, the territory. Starting with some deep beliefs that inspire our work:

- that a great product can't exist without a great territory;
- that viticultural quality development and, in general, agricultural, alimentary and gastronomic excellence is a basic factor for long lasting economical development of territories, ecological and environmental balance, beauty of landscapes, people's wellbeing, the quality of life for the residents and therefore, that tourists and guests will be well received;
- that territories with these features are able to prompt tourism from this extraordinary potential.

For these reasons, for 9 years we have been carrying on trend analysis of this tourist sector, producing an Annual Report of our Observatory of Tourism and Wine, whose 2011 edition was presented to the press a few days ago in Rome and it will be an item of an international Forum that will take place in

Cagliari next 10th of June, to which you are all invited.

The Report 2011 confirms and shows some clear tendencies.

It confirms that wine tourism is an increasing phenomenon. It increased during the terrible crisis years – though not yet ended – and it shows a very positive sign in concurrence with the international first signs of recovery. It is not yet mass tourism like seaside resorts or art cities, which are good standard services for all kinds of customers. But it is no longer a niche market phenomenon, a very specialized service for very specific customer, for a limited Elite. In Italy alone, about 5 million tourists consider the eno-gastronomic experience when choosing their holiday destination.

It confirms then that this kind of tourist has medium-high purchase capacity.

It confirms that there is a strong interest in the total offer of a territory, above all in relationship to the culture, history, nature and special events. And to a strong gastronomy characterised by quality. Wine, once the number one reason, has dropped to fourth place behind gastronomy in general, quality gastronomy and general interest for the chosen territory in the rankings of reasons for choosing holiday destinations. This doesn't worry Città del Vino, but on the contrary confirms the close relationship between product of excellence and territory of excellence.

The Report gives information about strong tendencies in which we must pay close attention to.

As a matter of fact, it shows that besides the classical destinations, like Chianti, Montalcino, Langhe Monferrato, etc. that are tending to uniform what they have to offer, the choice of customized and personalized solutions is quickly growing, with a strong inclination towards the discovery of lesser-known destinations, fonts of surprise and emotion.

It shows that traditional eno-gastronomic ways of eating (lunch or dinner), are being matched by a rejuvenation in consumer's interests – quick and streamlined ways to eat, with a more intense concentration, like snacks, gourmet platters, ap-

petizers dinner, finger-food, a phenomenon also known as «snapping» (snack+supper).

It tells us that «food shopping» is increasing, the purchase of quality local products to consume «after», also raw products such as vegetables, fruits, meats, mushrooms, truffles.. and not only purchased directly from producers, but also in commercial places like specialized shops, Farmers' markets, co-operative stores, wine cellars. The perfect example is the formidable success of Eatly, model of a real food «outlet».

It tells us that, within a phenomenon we already knew – that Internet is the best way to realize our way – the traditional «content based only» website will be surpassed by websites with multi and social media, social networking, message boards, and user rating sites, such as Trip Advisor.

These are not academic considerations, but, with great evidence they contain concrete indications to organizational and promotional choices of territories. This is the mission of the Associazione Città del Vino that I have the honour to preside over: giving our communities and our territories instruments for action and improvement, by spreading good practices and the best performance.

Wine and gastronomic tourism is one of the most interesting tourism aspects of tomorrow, that will be characterized by the predominance of emotional and motivational elements. Therefore it is essential to work for its development. Not only for Italy, a country that has a variety of offers making it, maybe in this sense, the only in the world, but also for emerging countries in the spectrum of international tourist offers.

I'm sure it will be useful to everybody to improve the efficacy of administrators and operators job and bringing benefit to our lands and our people.

Enjoy your work.

Giampaolo Pioli

Mayor of Suvereto

President of Associazione Nazionale Città del Vino

Introduction

Renata Tomljenovic*

With almost half of the world's total vine-growing area and 60 percent of wine production, the European Union (EU) is the world leader in wine production. Of that, 80% of wine production comes from the Mediterranean countries – France, Italy and Spain (Baldi 2011). These countries are, at the same time, among first five destinations of the world in terms of tourist arrivals (UN-WTO 2012). Other countries of northern Mediterranean, such as Portugal and Greece are also established wine producers, while Slovenia, Croatia, Montenegro and Turkey are also emerging wine producers. They are all well established tourist destinations.

For some time now, both, the wine industry of north Mediterranean rim countries and their tourism industry are facing significant challenges. The wine industry is struggling with oversupply, stiff competition especially from the New World's wines and an uncertain demand as consumption levels are decreasing. In terms of tourism development, many Mediterranean destinations are in maturity stage of their life cycle facing either stagnation or a decline in tourist numbers, with a majority of them being too slow to capitalize on demand for niche tourism products and to expand its homogeneous brand identity of sea, sand and sun.

In spite of the economic importance of wine production and tourism industry, the wine tourism was slow to develop in countries of northern Mediterranean. Its development was

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prompted only relatively recently by the simultaneous occurrence of problems faced by maturing tourism and market difficulties confronting wine producers. The wine industry turned to tourism in order to increase sales with minimal distribution cost and to build the brand awareness, the later especially important for many regions not readily recognizable as wine producers. The tourism sector perceived the wine industry as a formidable partner in expanding product range, enhancing destination image, attracting higher yield market segment, minimizing seasonality and spreading tourist demand to the hinterland, away from the narrow coastal strip.

Thus, although the north Mediterranean countries have all predispositions for wine tourism development, the New World countries emerged not only as the strong wine competitors, but also took the lead in wine tourism development. It comes as no surprise, then, that most of the research related to wine tourism published in international academic journals, comes from New World. Already in 2000, Getz's book on wine tourism was published. Building on insights available till then on demand and supply side of wine tourism, Getz proposed a model of wine tourism development highlighting its complexity. At the very basic level, it requires a wine landscape to enjoy in and to set the scene and visitor-oriented vineries. The visitor orientation needs to be stressed out, as producing great wine and welcoming visitors requires different skills. Unless a region has major corporate winery as the hallmark attraction, there should be a critical mass of wineries. They can be organically clustered in a village as it is often the case in Europe, or cluster can be created through a wine road. As visitors often demand a range of supplementary products, wine-themed visitor centers, wine museums, festivals and tours need to be created, most often through destination wide actions. For wine tourism development to succeed several critical factors need to be addressed. At the level of winery, beside the wine quality, it is the type and quality of hospitality offered to visitors. Destinations need to create an integrated wine tourism product, connecting all the

individual elements into an integrated marketing strategy. It is also helpful if there is at least some initial demand, whether from the local/regional visitors or from tourists. Yet, the most potent wine tourism destinations are often in rural areas away from strong domestic demand or significant tourism flows and, consequently, with poorly developed infrastructure for visitors.

In terms of wine tourism development and management, there is an agreement that wine tourism can be almost impossible to develop if winery operators do not possess an adequate level of entrepreneurial spirit to invest in visitor facilities and take on the financial risks that it entails. It is also helpful if there is a financial scheme put in place to support investment in visitor facilities. Tourism is a complex system difficult to understand, so there is a need to train winery operator in how tourism works, especially in part relating to tourism distribution channels and fitting the product to visitor needs. In order to gain desired benefits, stakeholders need to mount a coordinated range of actions, for which a variety of partnerships has to be established.

This brief sketch of wine tourism system is mostly derived and verified from the research conducted in New World countries, especially North America and Australia. Those countries have different cultural background and vastly different approach to wine industry development. Up to very recently there was a paucity of research on wine tourism development in Mediterranean. Yet, there is a reason to believe that the wine tourism development models and key success factors cannot be simply transposed to Mediterranean context. As Charters (2010), with his good insight into the state of wine tourism development in various regions of Mediterranean and experience in New World countries, aptly illustrated, the context of Mediterranean wine tourism development differs greatly. In Mediterranean, the bulk of wineries are small, family owned and whose serious wine production started no more than twenty years ago. They Wineries there have invested heavily in wine production facilities and equipment, often also in purchasing

or planting new vineyards and now lack funds to invest in proper visitor facilities.

It is also often the case that their level of interest in growing tourism side of their operations is motivated mostly by a need to increase cellar-door sale, rather than as a part of an overall business strategy. Although the importance of wineries' visitor orientation to success of wine tourism cannot be overestimated, in many cases wineries tourism product is limited to tasting and sale and the story of wine geared towards the segment of knowledgeable wine lovers with whom winery operators can go into details about wine. This segment, however, is small and often makes an exclusive winery visit. The majority of visitors want simply new experience and some education and the wineries are poorly accommodating their needs. Wine roads are often created, but in reality they are no more than a thick line on the map with, eventually, some general signage, too general to be of help to visitors. Besides poor marketing to visitors, there is a question on how to forge partnership, as Mediterraneans are very individualistic and like their independency. The relationships forged with travel trade, restaurants, DMO/DMCs are sporadic and often full of tension and mistrust. Another important insight relates to the winery visits – in many regions, even those close to the major tourism destinations – visitors number are small, as is the proportion of wine production sold at the cellar. Although in many Mediterranean destinations tourism depends on foreign markets, at wineries local and domestic visitors prevail. Many Mediterranean wine regions and even countries are also limited in their wine tourism potential as the existing tourism markets are not recognizing them as producers of good quality wines. This puts under the question hope that the sun and sea market can be channeled to wineries and, instead, might mean that a completely new markets need to be attracted by the regional wine tourism product. Finally, unlike in the New World wine regions, where wine production is set up as a business enterprise from the outset, in Mediterranean it is part of the agricultural practice and, as such, it is embedded in com-

pletely different attitude to entrepreneurship. With the lack of capital, lack of knowledge on how to set up and manage tourism side of the business and distrust of partnerships, the coordinated wine tourism development faces a whole different set of issues than in the New World countries.

Notwithstanding the lack of research carried out in Mediterranean wine tourism development, the Mediterranean countries are developing their wine tourism product, mostly following the model established in New world countries. Some are already successful, such as French Champaign regions, owing to world-wide recognition of their wines. Some are embracing strategic approach to foster a more coordinated development. Spain, for example, has implemented a wine route certification scheme as a part of their Comprehensive Spanish Tourism Quality Plan 2000-2006. In Italy, a law on wine roads was enacted to ensure a consistent development of wine tourism product. Some countries, such as Croatia and Slovenia, are putting efforts into establishing themselves as wine producers and wine tourism is part of the wine brand awareness building. Then the east Mediterranean countries, such as Turkey and Israel, are also emerging wine tourism competitors. Their marketing approach is also very similar. Even a brief search of national, regional or local www sites promoting wine tourism discovers certain uniformity of approach. A potential visitor is told that there is a long tradition of wine production, regional wine was well known and in demand by nobility and wealthy, then disaster strikes and phylloxera destroyed vineyards. Since then, wine production recovered slowly until it was revived in 1980s. Now, the focus is on high quality wine which are highly acclaimed by international wine experts. As, in the recent past, Mediterranean destinations have developed a uniformed sun and sea product competing between themselves on value for money proposition, there is a tendency to do the same with wine tourism.

Thus a dilemma – should we copy the successful cases and practices from the New World reasoning that if it works there, it should work here, even at the risk of being permanent fol-

lowers. Alternatively, should we mount an effort to benchmark wine tourism development against the New World countries and articulate own wine tourism research agenda to inform development process. This was the main focus of discussion with prof. Getz during his academic visit to the Institute for Tourism in 2002, inspiring us to articulate a research proposal “Assessing entrepreneurial potential of wine tourism development in Slovenia and Croatia in order to increase competitiveness” approved for two-year funding (2004-2005) from the Bilateral research program of the Ministry of Science, Education and Sport. This research facilitated comparison between New World destinations and that of Croatia and Slovenia in terms of the stage of tourism development and entrepreneurial orientation of wineries. Following popularisation of the project at several regional conferences, in 2007, at the TTRA conference in Nice, Maria Francesca Romano and Michela Natilli presented a methodological framework to study wine tourism. Subsequent discussion, focused around fostering Mediterranean wine tourism research and publication, led to preliminary plans to work on setting up an informal research group and, as a first step, provide an overview of the state of wine tourism research and development in north Mediterranean ring. Over the following two years the network widened gradually and then, in 2008, at the Tourism development and management conference held at Greek’s island of Kos we took an opportunity to organise a session dedicated to the topic. In total, ten papers were presented, we had an opportunity to meet in person, widen our network to include researches from the east Mediterranean and discuss grounds for collaboration. Out of this, we have published the special issue of *TOURISM* (Volume 57, Issue 4) dedicated to the topic.

Since these activities have inspired group members to continue their efforts in wine tourism research and provided a platform for dissemination of results, we have considered it opportune to organize a conference that will draw together researchers from Mediterranean and the reminder of Europe to

discuss the wine tourism development and draw up a research agenda for our future efforts. Maria Francesca Romano and Michela Natilli, from Scuola Superiore Sant'Anna took on lead and organized the “First European Conference on Wine and Food Tourism” held in Volterra, April 13-15, 2011. The conference was attended by 54 delegates from 8 countries. With Steve Charters, Giancarlo Scalabrelli and Don Getz and as keynote speakers setting up a framework for the conference, the papers presented illustrated clearly that the research in wine and food tourism is accelerating in Europe and the conference was an opportunity to focus on the results of many different approaches, theoretical foundations and variety of methods used. Equally important, it was a opportunity to overcome linguistic and national boundaries as it turned out that it is not so much the lack of research into wine tourism development but the fact that the results of these studies are most often published in national journals and, due to the language barriers and limited circulation of these journals, not reaching the wider readership in Europe and abroad. Finally, this book as the final outcome of the conference should also serve the same purposes – to foster wine tourism research and culture of cooperation, to broaden research agenda beyond the current focus on supply and demand side and, most importantly, to encourage us to disseminate our results beyond national boundaries.

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