

INTRODUCTION

These guidelines were drawn up within the framework of the transnational project headed by East Venise LAG, which co-operated with AGFOL, RIPA, CIPA-AT, PORTOGRUARO CAMPUS, and with groups from La Rioja in Spain and from Hérault in France. The general aim of the project was to exchange information and develop relations between local authorities with a responsibility towards the promotion and economic development of rural areas. Wine tourism, which involves products and services to tourists, is one of the main focuses of this project. Both local authorities and the mass media are sensitive to the question of wine tourism, and this sensitivity can be tapped to promote characteristic products which can be found in no other area.

These guidelines are for anyone who wishes to work in the wine tourist industry and wishes to understand more about the related products and services, in the light of the special features of a given area.

The guidelines are intended as a way of collecting information and of analysing the special characteristics of a given area in relation to tourist trends and the features of other areas.

The booklet is in the form of questions and answers. The questions are not intended to be exhaustive and the answers are examples of how marketing tools and other instruments can be used to promote wine tourism. The guidelines also include some useful information.

This information refers to the East Venise area but also contains data brought to light by co-operation with other members of the project headed by East Venise LAG (Rioja in Spain and Hérault in France).

The final section of the guidelines contains a bibliography with useful reference material for further study.

The guidelines sometimes mention Wine Routes, but does not go into detail about this question, which is already regulated.

The booklet is intended to help people interested in the possibility of working in wine tourism to come to a decision, and to help those already working in wine tourism to improve their services.

This means wine makers, hotel owners and managers, service providers, and local authorities, Tourist Agencies and professional associations, etc.

The subject may also be of interest to others, outside the territory, involved in the tourist industry or interested in making investments.

The guidelines may also be useful to training and research organisations for classroom and other activities.

HOW TO READ THESE GUIDELINES

The sections include:

- > Questions;
- > Answers;
- > Examples and detailed information.

Graphically, the questions look like this: ...

QUESTION 11

How has wine tourism developed?

This is followed by some answers. Not all possible questions and answers are included.

A graphic box is sometimes used for more detailed discussion or information, as follows: ...

From the press...

"Characteristic products are crisis free" (Il Sole24 ore, 10 October 2001)

"Wine: bursting with health" (Mediobanca for Il Sole24ore)

"Alternative forms of tourism (ecological, cultural, wine tourism) have highest growth figures"

"After seaside, mountain resorts and art cities, wine tourism tops the bill"

The answers to the 30 questions follows a methodological logic, as follows:

1. The choice of product;
2. Understanding demand;
3. Current supply and the creation of a network;
4. Making the product;
5. Promoting and communicating the product.

1. THE CHOICE OF PRODUCT

Why is wine tourism important?

QUESTION 1

From the press...

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"Alternative forms of tourism (ecological, cultural, wine tourism) have highest growth figures"
"After seaside, mountain and art cities, wine tourism tops the bill"

Studies on tourism and in economic journals show that wine tourism is a high potential industry, even when other products are undergoing a period of difficulty. Wine tourism is seen as an opportunity to renew the territory and farming in general by stimulating greater controls and improved quality, and by assisting employment and the involvement of local businesses.

The choice of wine tourism for an area with characteristic wine and food products is an important opportunity to be looked into carefully. Consumers and the mass media (which heavily influence demand) are interested in the subject, as are local authorities and opinion leaders.

Let us look in more detail at the opportunities that exist, at the resources available and the ideas that go into the wine tourist industry, based on co-operation between wine makers, wine cellars, the rural world and service providers.

What is wine tourism?

QUESTION 2

This is not such an easy question. Like all other forms of tourism, wine tourism is a complex business involving territory, culture, labour, the countryside and art (le patrimoine, the heritage). Internationally¹ the following definition is used:

"Visits – for recreational purposes – to vineyards and wine cellars, wine exhibitions and festivals with the primary aim of tasting wine and experiencing something unique to a wine producing area."

This definition indicates a number of important factors:

- Wine tourism as **purposeful**, with activities (wine tasting, experiences...) based on a given **product**, with a perceived **value**. Culture, knowledge and understanding with similarities to industrial tourism also play a part (visits to wine makers);
- Wine tourism is associated with certain **destinations**, particularly rural destinations, with special or unique characteristics, the countryside of vines, the climate, etc. are associated with pleasant central and southern European locations with a history of tourism.

¹ Wine Tourism, op. cit., p. 3.

A survey ("Le Città del Vino") carried out in the mid-nineties² with visitors to wine-makers, identified the motives behind wine tourism as follows:

- > **Discovery and greater understanding of wines (above all in spring/summer);**
 - > **Art, nature, wine and cuisine.**
- Other, less important reasons, included: **the love of the countryside, food tasting, and looking at less well known works of art.**

Wine is certainly a strong reason for travelling and a particular wine (or review of it in a wine journal or newspaper) may suggest a particular geographical region; but three quarters of wine tourists are also interested in the countryside and its history. They are generally wine lovers but not connoisseurs.

What do wine tourists want?

QUESTION 3

This is an easier question:

- > Good wines;
- > Good food;
- > Wine tasting, with the help of an expert or the wine maker himself;
- > hospitality.

However, this answer means that the relationship between wine and tourism is not so clear. Is it wine makers or tourist organisations that really drive wine tourism?

Whichever, the local area is always involved.

Wine producing areas can be called "districts", with specific characteristics.

Areas of beautiful countryside rarely become tourist areas unless they have something else to offer.

In economic terms wine production is probably more important than the tourism it generates, but the tourist aspect should not be overlooked.

What are the figures for wine tourism in Italy?

QUESTION 4

It has been estimated that there are about 3 million wine tourists in Italy each year, although it is difficult to know exactly who they are.

One of the most interesting facts to note is that in Europe, and above all in Italy, **wine tourism is a recent phenomenon**, despite the fact that wine makers have been celebrated for centuries.

Oddly, the new world (USA and New Zealand) has developed products for wine tourism more than the old world.

France began to develop wine tourism in the eighties, with public and private investments and the creation of a tourist network (over 70,000 tourists visit the vineyards of the Bordeaux area, a famous name and fairly large geographical region). In Italy, as in other sectors, the industry is more fragmentary. Until 1993 (i.e. the creation of the Wine Tourist Movement) wine was not considered a tourist attraction: it was an important industry in its own right, and that was all. The ups and downs of

² Detailed results can be found in M. Antonietti Corigliano, *Enoturismo*, Franco Angeli, 1996

Italian wine over the years, the huge growth in exports and the success of Made in Italy are behind the investments in wine tourism in Italy, with wine producers adding to their love of wine, a dedication to place.

"See what you drink" was one of the earliest slogans, based on the concept of wine cellars in the role of museums or other forms of tourist attraction. Today the Wine Tourism Movement (WTM) has over 700 members in Italy, including wine makers, tourist operators and the media; the interest in cuisine and tourism in general has increased in the press and on television.

Wine Tourism

Wine Tourism is a business with a turnover of € 1.54 bn (€ 2.58 bn by 2005) with 3 million wine tourists, according to a Ceras survey. It is estimated that soon 5 million Italians will travel in search of wine, nature resorts and cuisine.

Wine is less and less a basic ingredient of cuisine and increasingly an element of style characterising quality of life; it is therefore a natural vehicle for promoting local territories, visit to wine-cellars, characteristic products, cuisine and other forms of hospitality. Social research confirms that wine is the ideal means for promoting a mixture of local features: culture, the countryside, wine, cuisine, art, food and quality handicrafts.

Wine is now considered the third attraction for tourists visiting Italy. The medium-high tourist segment is attracted by wine, the countryside, cuisine and art (in this order).

The Wine Tourism Observatory has established that over 14 million people visit traditional wine making areas and 57 million tourists are occasional tourists/days in Italy, more detailed data are not yet available, because wine tourism is a niche market and:

- some typically rural DOC areas do not have a well developed hospitality industry; facilities are concentrated in towns and traditional tourist areas;
- in some wine production areas (e.g. Tuscany) tourism is not based primarily on wine.

QUESTION 5

What does the territory get out of wine tourism?

In terms of the territory, wine tourism can help to:

- safeguard the environment and rural culture, by self-sustaining the activity;
- diversify the economy (farming and other activities);
- add value to characteristic local products and lead to innovation;
- disseminate economic benefits;
- add craftsmen and restaurants to the network of service providers;
- add to traditional tourist activities in the region (East Veneto, Languedoc-Rousillon), particularly if these areas are ones of mass tourism;
- add value to the land;
- increase employment and earnings;
- create projects for working together.

In terms of wine producers, wine tourism can:

- promote the image and name of the wine maker;
- improve consumer understanding and appreciation;
- lead to new sales channels;
- improve the reputation of wine generally;
- create customer loyalty;
- add to profits (higher consumer prices).

In tourist areas, 18% of bottles of wine sold are to visiting tourists. Wines in famous wine production and tourist areas are sold at higher prices.

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- In terms of the consumer, wine tourism has the following advantages:
- better understanding of wines;
 - more responsible consumption of wine;
 - greater quality;
 - a better understanding of the region.

An example of wine tourism and improvements for the local area in Italy: Montalcino
This is perhaps the most obvious example, although the unique nature of the area make it a hard act to follow.

The ingredients are beautiful countryside, the fame of Tuscany, the quality and fame of Brunello wines and the unique features of the local wine (Brunello is only Brunello di Montalcino).

The data show an increase in earnings in the area of 300% over the past ten years. Supply has been stimulated by demand, and demand by wine tourism. The risk is now one of over production or of activities being given over entirely to tourism, without the necessary wine production to back it up. This risk can only be averted if the quality of the wine remains at the highest level.

More information about Montalcino

In Montalcino (5,200 inhabitants) between 1997 and 1999 hospitality facilities increased from 14 (76 beds) to 50 (620 beds); tourists rose from 5,800 to about 24,000. Capacity in restaurants went up from 830 to 2,140.

The number of museum visitors doubled or more (Camminamenti della Fortezza: from 13,000 to 52,000 visits).

Similar results have been obtained by areas with other characteristic products, such as truffles, ham and olive oil.

QUESTION 6

When does the product work?

Tourism related to characteristic local products is often associated with a local festival, intense occasions with large numbers of visitors. More systematic tourism leads to a more balanced economy.

As a product, wine tourism works when:

- the origin and quality of the wine is certified and guaranteed (DOC, DOCG);
- there are a relatively large number of high quality wine makers;
- the general level of services and facilities is high (public phones, etc.);
- a flourishing craft industry and characteristic food products;
- a variety of attractions and no obvious hindrance to tourism (ecological conditions);
- easy access to clear information;
- a well-developed hospitality industry: hotels and restaurants (preferably with local cuisine), long shopping hours, special events;
- training and specialist courses;
- an integrated, quality product: tourists do not want only wine, but an overall experience.

³ Guidelines are also enshrined in the European publication

A Methodological Guide to Wine Routes, published by AREV, Assemblia das Regioes Europeias Viticolais.

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"The idea is not to promote an individual product but all the characteristics products of a region. Nowadays tourists are consumers who are looking for an overall package: wine, restaurants, recipes, cheeses, wine cellars, local history."

It is also important that the strategy reflect aims for the territory, planning and the interests of social groups.

This means that wine tourism and the safeguarding of the environment must take other priorities for the area into consideration: industrial development (above all in certain sectors) and countryside-based tourism may not be compatible, but extreme conservationism (lack of access, etc.) may also make tourism impossible.

Wine and tourism are based on **regional identities**. They are a kind of "brand" for wine, and enable consumers to distinguish between one wine and another. Similarly, a wine may become the symbol of a region, particularly if it has DOC or DOCG protection.

"Sell the territory in order to sell its wine, sell the wine in order to sell its territory", wine and the local region from which it comes are complementary products.

The image of the region and of the wine, or other characteristic products, must be coherent.

An obvious example is the Alto Adige (South Tyrol): its foods and wines coherently promote the area and are a guarantee of natural, genuine production.

Rioja in Spain, where wine tourism is already very popular, is another example.

In terms of local authorities, the costs involved are for organisation and infrastructure, entertainment, information, quality control and the physical and economic sustainability of the activity in the region, which should not be over-exploited. For example (as we will see below) wine tourism can actually jeopardise wine production by over-production, loss of authenticity or economic change (e.g. the new value of the land may become an objective in itself). To some extent this is what has happened in California, but it could happen in certain areas of Europe too.

Another danger is over-investment in infrastructure based on optimistic forecasts for the wine tourism industry.

QUESTION 7
What are the costs and difficulties for wine makers going into the hospitality business?

This depends on each specific case, but in general the costs and problems are:

- Costs:
- increase in infrastructure (wine tasting, presentation of the wine cellar, service and facilities), IT, car parks, visits to vineyards, etc.;
 - increase in service costs (guided tours), raw materials, use of time (e.g. weekends);
 - training of entrepreneurs and service providers;
 - costs of communication and information (road signs, brochures, internet site, etc.).

Problems:

- solution to problems of co-ordinating collective projects (e.g. participation in Wine Roads);

- dialogue with competitors and new types of institutions;
- impossibility of increasing sales because other sales channels have already been chosen.

Here are some tips on *cutting costs/increasing profits*:

- charge for wine tastings and visits (not always allowed), or supply services with a fee;
- review distribution and wholesale/retail prices (renegotiate commission);
- reduce the uncertainty associated with visits (keeping personnel tied up) by a booking system;
- outsource or share some costs (guided visits to a consortium);
- use the financial resources and promotions available.

Now it's time to look at the specifics of a territory:

KEY QUESTION 8
Does wine tourism meet the needs of the area and serve its interests? In practical terms, the experience of areas that have chosen to develop wine tourism, is as follows:

The answers clearly depend on the area, experience of wine tourism and other factors. In practical terms, the experience of areas that have chosen to develop wine tourism, is as follows:

East Veneto and Hérault are similar wine producing areas.

In East Veneto, wine production is concentrated in three areas: Prosecco, San Donà and Opitergino Montebelluna and is one of the most important wine making regions in the Veneto. Specifically, the local authorities with intensive vine farming are Opitergino Montebelluna, Annone Veneto, Pramaggiore and parts of Prosecco (particularly Lion and Pradolzo), Zansolo, Fossalta, Noventia and San Donà di Piave. Montebelluna and San Donà are entirely in the Prosecco DOC area, whilst Prosecco is nearly entirely in the Lion Pramaggiore DOC area.

The area includes many specialist wine makers.

East Veneto also has a service industry and light industry.

> **Wine making** in Hérault is a centuries old activity which had its hey-day between the nineteenth and mid twentieth centuries. After a period of difficulty in the sixties and seventies, the area dedicated its wine making to "appellation" wines, which have become famous and generate considerable income: table and "de pays" wines have heavy competition.

> **Tourism** in East Veneto is along the coastline, with over 1 million tourists and 8.7 million tourists/days come from Central Europe, particularly from German speaking countries. There are virtually no hospitality facilities except along the coastline (about 700 beds compared to 100,000 on the coast). Only 1% of tourists stay anywhere other than on the coast, despite business activities elsewhere.

> **Tourism** in Hérault is the most highly developed industry alongside wine making. Here too, tourism is basically entirely along the coastline, with 1.5 million tourists and 40 million tourists/days per year, producing turnover of 8 bn Francs, with 40,000 employees.

UNDERSTANDING DEMAND

To understand any product, it is necessary to analyse the demand, consumers and trends.

The following section explores wine consumption figures, the motives of holiday makers and behavioural trends (including chosen destinations).

What is the picture of wine production in Italy?

QUESTION 9

Here are some basic data in Italy

The wine economy and wine production in Italy
Throughout the world 26,800 million litres of wine are produced per year. Italy and France together produce about 12,000 million litres.

Italy produces about 21% of the world's wine and 34% of the wine of the European Union.

On average, Italy produces 5,600 million litres: 49% red, 51% white (data based on the findings of the Associazione Italiana Enologi, in 2000).

- The wine breaks down as follows:
- 220 million litres of Docq.
 - 850 million litres of Doc.
 - 233 million litres of Igt.
 - 2,200 million litres of table wine.

Doc e docq wines amount to 21% of Italy's wines. There are 22 Docq wines: Bardolino Superiore, Barolo, Barberesco, Brachetto, Brunello di Montalcino, Nobile di Montepulciano, Chianti, Chianti Classico, Albana di Romagna, Asil or Asil Spumante, Moscato d'Asil, Ghemme, Carmignano, Franciacorta, Gattinara, Gavi, Recioto di Soave, Sagrantino di Montelupo, Toriano, Taurasi, Vernaccia di San Gimignano, Vermentino di Gallura) and 323 Doc wines (as of 1 September 2000), but with 1,800 different types.

There are close to 1 million wine makers, two-thirds of which have a total surface area of vineyards of less than 1 hectare (10,000 square meters), making a total of 700,000 hectares of small farms. 7,000 farms have a surface area of over 10 hectares, a few hundred have areas of more than 50 hectares. There are only 30,000 bottling companies in Italy with an average of 5 labels each, making a total of 150,000 different labels. Recent surveys show that the total area of vineyards in Italy is a little above 830,000 hectares (1,227,000 hectares in 1980).

Italy has exported less but with higher added value, confirmed by the average price per litre, up from € 1.25 to € 1.40 (€ 0.52 in 1988).

Wine exports figure strongly in Italy's balance of payments, one of the few food products in the black: 60% of exports go to three countries: Germany (32%), France (26%), United Kingdom (9%). These are followed by USA (7%) and Switzerland (3%). Italy is the world's largest wine exporter: its quality wines out-export France in Germany; exports to the USA are rising.

Wine imports in Italy amount to 61,300,000 litres (down 2.2% on '99) with a value of € 15.5 million (an increase of 8%). France is the leading exporter to Italy (about 80% of imports), followed by Spain, Germany, United States, Chile, Australia and South Africa. There are about 3,000 farms using organic techniques, representing about 25,000 hectares of vineyards. This wine is of high quality and most is exported (70-80%).

Data relating to the important Veneto wine making Region.

In terms of Doc wines, the Veneto Region has 3 national firsts: of the 200 million litres of Doc wines produced, 20% come from the Veneto (ahead of Piedmont), with 20 recognised production areas and 4 wines in the top 10. Despite this, the wines of the Veneto Region are better known abroad than in Italy.

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How much wine does our area produce?

QUESTION 10

Wine tourism operators should be aware of the quality and quantity of the wine produced in their area and of the relationship between wine making and other activities.

Wine production in Lisbon-Prague
Wine production on the area amounts to about 10,000,000 litres, from various types of wine. 2,406 hectares of land are used for vineyards in the Doc area of 3,200 hectares. The wine consortium has 129 members.

What about wine consumption in Italy?

QUESTION 11

When designing a product, consumer tastes, trends and habits are obviously important (leisure time, average wine spending, other types of products)

The consumption of wine in Italy

The average consumption of wine per head in Italy has fallen from 120 litres at the beginning of the century to 99 litres per year in the sixties. After steady growth to 116 litres in 1968, there has been a continuous decline, to 95 litres in 1978 and 60 litres in 1995. Figures for 1994 were 59.5 litres and 59.5 for 1999 (forecasts are for 60 litres in 2005). This is due to a complex number of factors related to lifestyles, changes in nutritional habits and behaviour patterns.

Consumption varies greatly from region to region (data below refer to 1995): the highest is in the Veneto, with 76 litres and the lowest in Sicily with 27 litres. Tuscany and Piedmont, two important wine production regions, consume about 58 litres per head, followed by Friuli Venezia Giulia with 44 litres and Trentino Alto Adige with 42 litres.

The principal distribution channels are supermarkets and hypermarkets (39%), small points of sale (10%), wine merchants (16%), direct purchase (32%), and sales by correspondence (3%).

- 31% of the population are regular wine consumers (compared to 56% in 1984)
- Only 20% of young people drink wine: one third drink wine at meals, one third with friends and one third on special occasions.
- There is growth in the young market, however, about 10% (the highest of any group).

Patterns of consumption

Wine surveys generally identify two types of consumption and a number of different groups of consumers.

Historically the largest group, now in decline, were habitual drinkers at mealtimes, with quantity rather than quality needs (9 million). These consumers are loyal and buy directly from producers or from supermarkets.

The second group, now growing (16 million), consists of city dwellers, for whom wine is a ritual, i.e. a pleasure, to be consumed often outside the home, with elements of prestige and social status. These consumers are interested in quality brands and are willing to spend more than the first group.

This group also buys from producers, but is more swayed by fashion and sees wine in relation to certain dishes.

There are about 6 million consumers of quality wine in Italy, generally aged between 26-45, who look for branded products, read wine journals and go to wine bars. They also spend their weekends looking for art, culture, history and wine. Nonetheless, it is estimated that there are 24 million regular wine consumers in Italy and 16 million people with a home stock of wine.

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The Censis survey also highlights the importance of specialist wine tourist areas, although this opportunity is as yet largely untapped.

QUESTION 12

What are Italy's best known wine making areas and wines?

The list of Italy's top ten is useful to know, in order to compare the wines with the local wines in your area.

The Italian top ten wine making areas are like magnets for new tourism (Tuscany is virtually a cult area, followed by Piedmont, Veneto, Campania and Umbria). Censis has compiled a list of top ten wine attractions for Italian tourists (based on a potential 10 million travellers): Chianti, Conegliano, Oltrèpo Pavese, Montalcino, Monterotondo, Langhe, Trentino, Montefalco, Collio, Castelli Romani. The Italian regions which are mentioned most extensively in the foreign press for their wines are: Tuscany (24%), Piedmont (17%), Veneto (15%) and Trentino Alto Adige (10%). Italian wines are mentioned abroad in 57% of cases in wine journals, in 29% of cases in articles dedicated to tourist towns, 9% in articles on special events and 5% in connection with cuisine. The most famous Italian wines are: 1) Barolo; 2) Chianti; 3) Barbera; 4) Brunello di Montalcino. Over 100 brand names are known. Countries that appreciate Italian wines include Germany (44%), Great Britain (31%), the United States (13%), followed by France and Switzerland.

QUESTION 13

How and what do tourists choose?

To provide services to wine tourists, clearly it is important to understand the needs of tourists in general.

Tourist trends...
Over the past years a new trend has emerged in tourism related to tourism associated with nature, culture, discovery and the enjoyment of the countryside. Rural areas are often chosen. The phenomenon involves both long journeys and short stays in the local area, provided this area has something characteristic, authentic and of quality to offer. Often these are short stop-overs or day visits out of season (spring or autumn). France is ahead of Italy in this area, with a strong farm tourism industry. In Italy, certain regions have quite a strong farm tourist industry (Tuscany, Umbria), due to the blend of art, countryside, hospitality, events and characteristic products. Surveys show that the reasons behind this form of tourism are the search for authenticity, the discovery of new areas and a taste for the outdoor life, as well as the constructive use of weekends. This kind of tourist does not want to waste time and is looking for something characteristic to associate with the visit: wine.

Over 40% of Italians say they want to spend the weekends away from the city, in the open air. In terms of longer holidays, the intentions do not seem very different, but the number of people who actually realise their dreams is much smaller. Discovery, the environment and culture are again top of the list of motivations but the opportunities are far fewer and many of these holidays remain in people's minds. This is partly because there are no facilities for mass tourism of this sort.

Holiday motivation		All	The young
Discovery (natural and anthropical)		42%	59%
The environment		28%	40%
Get away from work		23%	1%
Family/friendship		7%	6%

Holiday destinations ⁴	Desire	Actual destination
Seaside	29%	55%
Mountains	17%	21%
Environment-history	45%	9%
Farm tourism	4%	6%

What people remember and appreciate most about cultural holidays is shown below.

What people remember and appreciate ⁵	51%
The countryside	51%
Art works	38%
Nature	25%
Special events	19%
The group	19%
Hospitality	18%
The climate	11%
Folklore	10%
Restaurants	8%
Purchases	3%
Other	2%

Wine tourism is part of the overall world of cultural and farm tourism.

- Wine tourism can be strengthened by the following strategies:
- "intangibility" and fame: one of the problems of tourism is its intangibility, so wine can be used to provide a concrete reminder of a region, at the same time as providing a quality product (investments may be required in the mass media to strengthen a brand's image);
- wine as status symbol: this means wine is no longer looked at as an element of nutrition but as a synonym of the quality of life of the consumer; it is a product of pleasure and of discussion;
- rural, outdoor life, with the discovery of something new (wine tasting, private research).

⁴ Source: report by Prof. Gardini to the International Conference on Sustainable Tourism, Rimini, June 2001
⁵ Source: CISET-DOXA survey for the European University Centre for Culture

It is not easy to define wine tourism and the wine tourist today; generally wine tourists are day trippers or short stayers with wine tasting and discovery on their minds as part of the motive for a trip....

A wine tourist is someone who travels to a place to taste or buy wine. Destinations are special events or wine makers. Many journeys are day trips or include day trips during a holiday with other motivations.

Many surveys of wine tourism were carried out in the nineties (by the Wine Tourist Movement and others) providing a picture of the target tourist.

For this tourist wine is important but not the only important thing about a journey; the other important factors are the countryside (often with vineyards), the local area and characteristic products.

Only 25% of tourists in wine production areas say that wine is the only reason of their journey; the remaining 75% say it is a blend of wine, art, scenery and nature.

Italian wine tourists are more motivated by wine alone than foreign tourists.

Wine tourists buy wine but not large quantities: most say they buy between 4 and 12 bottles. Visitors to wine cellars tend to consume and buy more. If the main reason for the journey is the countryside, the purchase of wine takes second place. Wine tourists whose principal purpose for the journey is to stock up on wine are "wine buyers" rather than wine tourists.

Identikit of the wine tourist

Recent surveys give the following identikit:

Generally male, a habitual wine drinker, between 30-45 years of age, travels by car, often a German speaker, if Italian generally from the Centre or North.

Surveys of the Wine Tourist Observatory have analysed the behaviour of tourists booking into wine production areas, based on data provided by the hospitality industry. The motives for the journey are mainly the countryside and art, followed in 32% by wine and cuisine (above all for men). About 80% say they buy food and wine, but no more than 12 bottles.

Both men and women go to wine cellars and wine merchants (about 70%). Of Italians interviewed, 40% had previously been on a wine tourist journey to Tuscany, 12% to Piedmont.

Stop-overs are in hotels and farm hotels.

According to the Bocconi University survey for the Association of Wine Cities, the autumn wine tourist is different from the spring/summer wine tourist.

In **spring – summer**, wine is a stronger motive for travelling (50%), whilst a blend of art, nature, cuisine and wine is more important in autumn (70%).

In autumn trips are more frequently over 150 km and stop-overs are also more common. Tourism – characterised by people who stay over night – is more common in autumn than spring/summer, particularly for Italians. Spring seems more dedicated to day trips or the purchasing of wine; young people tend to prefer spring. In autumn visits to wine cellars are often part of a longer stay.

About three-quarters of visitors buy local wines. Most buy between 4 and 12 bottles in spring-summer; the number of tourists who buy nothing decreases in autumn.

Generally foreigners buy more bottles; some Italians buy no wine at all. Often they buy wine in a way not associated with tourism. Food produce is popular.

Internationally, wine tourists are between 30 and 50, with average to high incomes, living close to wine producing areas; they are habitual wine drinkers with a fairly good knowledge of wine. In addition to wine, these tourists want to enjoy the countryside and:

- taste and get to know the wines in order to reduce the risk of buying something they do not like;
 - meet the wine makers;
 - spend a good day outdoors.
- Wine tourism is a complex phenomenon not associated only with wine tasting or buying: it involves social activities in a group and an overall hospitality package (good food, overnight stay, countryside).

Remarks made by wine producers in less well-known production areas lead to the following idea of market segments:

- the **"hit and run" segment**: a large number of people, and a wide variety of categories. This segment enjoys food and wine, but tends to associate both with special occasions, group visits or events. Understanding is fairly limited, and visits are brief, generally without a stop-over. Includes young people. Most visitors of this kind are from nearby.

- the **"priority" segment**: this is the best target group: small in number, but higher spenders, with specific aims in mind. Over 40, good social standing, high cultural and economic backgrounds: people in this group are well informed, influenced by fashion but also have their own needs, appreciate wine and consider it something of a status symbol. They are frequent travellers, with considerable experience. They may come from far away (another country). They generally stop over if the location has proper facilities and there are activities to be enjoyed;

- the **"purchasing" segment**: traditionally this group buys wine directly from the producer (in small or large bottles); it is loyal to a producer, comes from nearby and visits wine makers without requiring supplementary services and without special interest in the countryside. This is a group where information could be targeted effectively.

These segments are present in different ways in most locations, on the basis of the wine and facilities available, and the general perception of the area.

Theoretically the priority group is the most interesting because it requires a variety of value-added activities and services; but it is difficult to ignore the larger segments. Most areas cannot cater properly for both types of visitor.

At the same time, if it is the large numbers that are wanted (and this can help to get service providers involved), organisation is required in order to avoid congestion, over-booking, and other problems that could undermine the satisfaction of visitors.

In the case of new forms of tourism, such as this, it is difficult to select a single target. Services should be provided to all visitors, without changing behaviour for one or other target. Understanding the characteristics of the local area is the basic requirement for all service providers.

Identikit of the wine tourist in Hérault

70% French, remainder North European or North American. Mostly from cities (in France, from Paris and Lyon).

Medium to medium high socioeconomic group.

Average age 40-50, with individual visitors between 37-70 and groups 40-50.

There are two main segments:

- individuals and families;
 - small groups of connoisseurs/wine lovers.
- On average the length of stay is 3 days, with exploration of the territory and its cultural heritage (visit to 2-5 wine makers).

Is there a demand for wine tourism in my area?

QUESTION 15

- This can be seen by asking a series of further questions:
- who buys wine in the area? Do tourists visit wine makers or only wine "buyers"? Is it a tourist area? When do tourists come?
 - Is the area one with a traditional form of tourism (seaside resort, spa town, etc.) which might be extended to the purchase of wine? (nationality, habits, interests of tourists);
 - Are residents in the area or nearby areas sensitive to wine?
 - Are there enough facilities to cater for wine tourists and make visits enjoyable and interesting?

The example of Venice Province

The situation in Venice Province is very interesting. It is an area of mass tourism with an intense demand for services but most services are concentrated in two areas: the city of Venice and the nearby beaches. In the rest of the Province, tourism is virtually zero. The DOC wine producing area has a few dozen hotel beds. The Province has 6 million tourists and 29 million tourists/days, most of whom visit either the city of Venice or the beaches. Only 5% of tourists and 2.2% of tourists/days visit other areas. In East Venice nearly all tourism is in Caorle and Bibione.¹

	Tourists	%	Tourists/days	%
Total Province	6,071,249	100%	28,991,060	100%
Venice	2,748,614	45%	5,909,236	20.4%
Beaches	3,033,142	40%	22,453,947	77.4%
Other local authorities	289,493	5%	627,877	2.2%
Tot. Portogruaro area	1,030,969	17%	8,748,587	30%
Caorle+Bibione	1,024,226		8,692,401	
Others in East Venice	26,743	3% of E.V.	56,186	1% of E.V.

This means:

- there is a strong demand from tourists in the area.
- it would be advantageous to encourage tourists to visit the hinterland.
- Wine is one of the ways tourists could be encouraged to visit the hinterland. Specifically, the beaches are mainly visited by German-speaking tourists who are also generally interested in wine.
- Different market segments require different products and services. In East Venice, Lison-Pramaggiore, service providers should be mindful of:
 - > **The relationship with beach tourists;**
 - > **The opportunity to include Venice in a wine tourist itinerary.**
- These are the basic features on which to work in order to develop wine tourism in the area.

II. THE SUPPLY SIDE AND THE CREATION OF A NETWORK

In order to provide a product and services, it is useful to know who else provides services, what kind, and how service providers may be able to help each other. Similarly, it is necessary to know what regulations and restrictions apply and what opportunities are provided by associations. The products and services may not be wine or related only to wine but include a number of different aspects of tourism.

What are current products and services like? What are the necessary conditions for rural tourism to flourish?

QUESTION 16

Only 20-25% of wine makers open to the public have proper visiting hours: the remainder asks tourists to phone first and to find their way to the location, without road signs, and often along dirt roads. This may please the adventurous but not everyone thinks it is a pleasant way to spend a day. In 1997 only 4% of wine producers could be thought of as part of the wine tourist industry.

Two examples: Collio and Montalcino

A survey carried out by the Wine Tourist Movement (D. Cinelli Colombini) and the Mondadori Wine Tourist Guidebook⁶ based on 40 wine makers in Collio and Brunele di Montalcino (i.e. two areas of prestige wines, one with a strong wine tourist industry, the other in the process of developing wine tourism) brought to light a number of interesting facts. Most wine makers interviewed were small (less than € 1 million turnover), with a total number of 1,000 visitors, mostly individuals, not groups. 20% of wine makers had renovated the premises to provide services to visitors, but in some areas the percentage was as high as 90. In the Brunele area, 60% of wine makers provided other attractions: not only the wine cellar, and 1/3 provided food and stop-overs. In Tuscany, many people work in the hospitality industry (excluding the smallest wine makers); bottles are fairly highly priced, 50% of tourists buy the most expensive wines for sale.

Few wine makers have a wine shop or even a specific sales organisation. 40% of wine makers in Collio spend over 30 mi a year in advertising.

In most cases wine makers offer wine tastings free, almost all have other products such as olives and fruit, etc. Many premises are in villas, castles, large farmhouses, etc.: industrial production with warehouses, etc. is rare. 80% of wine makers have personnel who speak foreign languages. In 60% of cases of wine makers in the wine tourist movement there is a special room set aside for wine tasting (in 25% of cases, tastings are in the home).

Some features of wine tourism today:

Not seen as a tourist product but as day-trip with cuisine. Visits to wine makers, lunch, look around the wine shop: generally at the weekend or on special occasions. Special promotional events are often very successful: they are an excellent way to attract tourists and to advertise producers. One risk is overcrowding: another is that the event may be seen merely as a sales promotion (tasting and sale, rather than explanation and discovery). These events may be difficult to organise, with wine makers quite distant, lack of co-ordination and little information.

⁶ report to the Vinitaly Exhibition 2001

- "industrialisation" of large producers (with famous labels but premises which are rather unpleasant to visit)
- importance of the trade press and mass media (wine journals, newspapers, restaurant guidebooks, etc.)
- importance of some service providers who tend to dominate
- private initiative (creation of wine museums, etc.) sometimes without coordination
- package tours only for foreigners: for Italians "DIY" seems more common, with less control
- wine makers who provide little information and no services (opening hours, access)
- rural characteristics
- dominance of certain famous areas over others
- little involvement of other service providers (not in the tourist industry or in the tourist industry, but in another region)
- little interest from tour operators
- strong interest from local authorities out of proportion with the actual volume of tourism

The following questions naturally arise about any given area: are the wine makers ready to welcome visitors? Do they provide services? How does the visitor get there and what can he do when he/she is there?

- If the situation looks bad, perhaps something can be done.
- Specifically:
- > in relation to specific features of the territory;
 - > by creating a local network of service providers, linked to the outside world;
 - > by thinking of the wine tourist industry as a whole, not as individual opportunities, but as a general opportunity for the entire area.

⇒ Wine tourism and rural tourism

- Wine tourism takes place in rural areas which are protected by regulations and restrictions.
- The specific features of the rural area can be identified⁷ and things taken from there: of particular interest are the areas of "industrialised countryside", i.e. with large but not dense populations, such as East Venice, with many farm labourers, as well as:
- areas of advanced agriculture: priority to cuisine, local produce and hospitality on farms
 - areas close to the sea which want to attract tourists into the hinterland: the priority is given to local culture
 - rural areas close to important historical or artistic towns and cities, as base for day trips (i.e. Tuscany).

Given these features, the restrictions and difficulties are as follows:

- ⇒ lack of services (information, restaurants) for visitors;
- ⇒ lack of facilities;
- ⇒ lack of tourist culture;
- ⇒ lack of traditional attractions, such as historical buildings: more abstract attractions such as fresh air, agriculture, walking, etc.

⁷ such as lightly populated mountain area, nature reserve, town, etc. A classification is given in the EU booklet cited above

- ⇒ need for guides or for help and for lengthy periods of time and some learning;
- ⇒ need for entertainment
- ⇒ sensitivity of the territory, which cannot be overloaded.

Are there national and local regulations governing wine tourism?

QUESTION 17

Wine Roads are currently regulated by a recently introduced national and local framework of by-laws. The regulations largely govern the creation of wine roads, delegating by-laws to the Regional Authority. The Veneto Regional Authority has adopted by-laws, as empowered to do by legislation. Provincial and local authorities are responsible for road signs and the provision of other information useful to tourists along the routes.

Current legislation is as follows:

- National
- Law 268 of 27 July 1999, "Regulations concerning Wine Roads";
 - Decree of the Ministry of Agriculture and Forestry, dated 12 July 2000 "Minimum quality standards applicable to Law 268 of 27 July 1999, "Regulations concerning Wine Roads";
- Veneto Regional Authority
- Regional Law 17 of 7 September 2000, "Creation of Wine Roads and other characteristic products of the Veneto Region";
 - Regional Authority Regulation 2 of 10 May 2001, "Creation of Wine Roads and other characteristic products of the Veneto Region".

What is needed to attract tourism to rural areas?

QUESTION 18

- European experts indicate the following basic requirements:
- ⇒ Transportation with low environmental impact (train, bicycle, etc.);
 - ⇒ Quality countryside and architecture;
 - ⇒ Hospitality integrated with the territory;
 - ⇒ Attention to the environment;
 - ⇒ Customised services;
 - ⇒ Quality recreational activities;
 - ⇒ Creative use of existing facilities.

All these requirements are relevant to wine tourism and focus on factors such as attention and sensitivity. It should also be said that in both the Veneto Region and Hérault local authority investments are generally focussed on the coastal area and art cities and not the hinterland. This is because the hinterland has not been considered a tourist resource but a different kind of area. It is not easy to change people's minds about this. Therefore the creation of a local network of service providers for the tourist industry is also difficult.

The attractions of East Venice
In addition to the beaches, the area has a number of unique features which are not well known and are therefore only potentially tourist attractions.
The categories are:

- Cultural attractions, with strong elements (art and history, archaeology, Abbeys, etc.) or weak elements (events, an atmosphere, special locations associated with famous people, such as Nîmes or Henningway, etc.);
- nature parks, or scenery of great natural beauty, unspoilt;
- countryside, with some of the impact of man on the countryside, including industrial archaeology (mills, for example);
- characteristic products, especially wine;
- services, activities and events;
- farm tourism.

The characteristics of a wine tourist network are dealt with in the next section.

Which local tourist operators should be included in the network?

QUESTION 19

It has been stated that a complete overall package of services must be provided for the wine tourist. This means organising a network of service providers who are willing to work together, and see the advantages of doing so. The network should include:

- wine makers and wine merchants: cellars, producers, wine shops;
- local authorities – departments dealing with tourism and agriculture;
- professional associations;
- other tourist groups;
- service providers, transport;
- attractions (museums, etc.);
- Tourist operators where there are large numbers of tourists (beaches), travel agencies, restaurants, tourist offices...

- Wine tourist operators in the Veneto Region
Regional Law 17 of 7 September 2000 and Regulation 2 of 10 May 2001 establish the following categories as potential members of the Wine Roads network:
- Wine producers, whether individuals or consortia;
 - Wine producers, individuals or consortia, with characteristic local food produce and wine;
 - Farm tourist companies;
 - Restaurants;
 - Businesses in the tourism and hospitality sectors;
 - Wine merchants;
 - Shops selling characteristic food and wine;
 - Consortia safeguarding and promoting characteristic and DOC wines;
 - Local authorities (Provincial Authorities, City Authorities, Mountain Communities);
 - Associations and Organisations of wine growers and/or wine producers;
 - Chamber of Commerce, Industry, Agriculture and Craft Industry;
 - Craft industries and sales companies with relevant activities;
 - Local economic, cultural and tourist associations;
 - Schools specialising in relevant subjects.

The network must allocate functions to members, seek a common identity, safeguard quality and share common aims and approaches.

A playmaker is also required to promote cohesion and coherence, but not one who dominates the network's activities.

Networks may be horizontal or vertical or both; the important thing is that everyone play a part.

Examples in France:
In the Hérault region, the network has the following functions:

- promotions and communication: from a "mosaic" to a "vinegiron" tourist mode, for the area as a whole. The market is highly competitive, with well-known wine tourist locations. The network therefore puts a great deal of energy into strengthening the local identity;
- fostering a homogeneous and high level of professional skills: quality is important in all products and services;
- authenticity: links with local history and culture, with the overall heritage of the region. Wine is one element of identity;
- management of added value: sharing of benefits, not only costs, throughout the territory, managed fairly and squarely by the network.

Networks

The local network is a group of businesses in the form of an organisation and may have a number of different forms.

They may be closely or loosely linked, focussed or broad (i.e. with different types of service providers).

Classical examples are Network development (with close links) as in Rioja, "joint promotion" (Lombardy, Piedmont), with Regional Authority co-ordination, and joint initiatives by wine makers.

Wine Roads organisations are another form of network, common in Italy, France and New Zealand, which does not involve joint promotions, but a joint identity and road signs, etc. They are based on wine makers.

How should the private and public sectors be managed? Who does what?

QUESTION 20

This is rather a complicated question, and no-one has a precise answer. In France (Hérault), for example, the public sector:

- establishes themes and the image of the network;
- promotes the network;
- chooses the wine makers who take part;
- induces members;
- deals with finance and looks for resources.

- The private sector has the following role:
- Tour operator: sells the product;
 - Wine makers: upgrade services to meet the necessary quality level;
 - Hotels: provide hospitality and a proper level of quality service.

Actions are therefore as follows:

Organisation/group	Role
Professionals in the wine industry	Products based on wine and the wine production area (visits to wine cellars, tastings, vineyards); Entertainment
Local communities	Support and financial assistance, infrastructure, entertainment and promotions.
Local Development Agencies	Design of projects and induction into the network

Chambers of Commerce	Support to quality certification and brands
Promotional Organisations	Tourist offices, promotion and tour operators for sales
Service providers	Hotels and restaurants, characteristic products.

Example: Lisson-Parmagigione

Wine makers

- a) Vinyr and bottle within the DOC production area.
- b) Car parks and other services
- c) Rooms suitable for visitors, information on the wines;
- d) Guided tours with information and learning;
- e) A wine tasting room, price list of wines available, price lists of tastings (unless free of charge);
- f) Wines served in proper glasses;
- g) Well-trained personnel;
- h) Proper opening times;
- i) A map of the local territory, with Wine Road, with service providers, wine merchants, etc.;
- j) Use of proper logos, road signs, company name, brands, etc. Clear signs with telephone number, opening times, foreign languages spoken, services available;
- k) Sale of DOC and IGT wines in glass bottles;
- l) Documents with the history and activities of the wine maker, vineyards, wines, etc.

Farms

- a) Production of characteristic wines of the region (DOP, IGP, characteristic food produce) or organic products;
- b) Location inside the DOC production area;
- c) Use of logos, road signs, name of the company, clear signs with telephone number and foreign languages spoken;
- d) Opening times;
- e) Sales of wine and wine tastings;
- f) Wines on display;
- g) Information about vine growing and wine making, characteristic local wines (DOC, IGT) and other produce.

Farm tourism

- a) Road signs and logos, the name of the company, display of telephone number and foreign languages spoken;
- b) Opening hours
- c) Display of DOC wines, even if the farm does not produce wine;
- d) If the farm is authorised to sell food produce and wine, it should display a map of the local DOC wine production area and organise tastings;
- e) Information about characteristic wines (DOC and IGT) and the farm's activities and produce (DOP, IGP and traditional products).

Restaurants and similar service providers

- a) Location inside the DOC production area;
- b) An up-to-date DOC wine map of the D.O.C. Lisson - Parmagigione wine production area, showing members of the consortium, properly displayed;
- c) Notification of prices to the Management Committee;
- d) Meticulous display of at least 6 DOC wines from the area, produced by at least 2 producers in the consortium;
- e) A wine tasting menu and characteristic food produce from the Wine Road;
- f) Information about DOC and IGT wines, as well as DOP and IGP produce;
- g) Use of glasses recommended by the Management Committee or suitable for the wines served; skilled waiters;
- h) Notification of recipes, characteristic dishes, prices and payment methods.

Wine merchants

- a) Location inside the DOC wine production area;

- b) Display of at least 6 DOC wines from the area, produced by at least 2 producers in the consortium;
- c) Display of all wines produced by members of the Wine Roads organisation;
- d) A room set aside for wine tastings with the necessary equipment;
- e) Display of the Wine Roads price list; notification of prices to the Management Committee;
- f) Information on the Wine Roads organisation and DOC, IGT wines as well as DOP and IGP produce;
- g) Use of glasses recommended by the Management Committee and skilled personnel.

Tourist and hospitality companies

- a) Location inside the DOC wine production area;
- b) Information on DOC, IGT wines and DOP, IGP produce;
- c) Trained personnel expert in the local area (environment, wines, characteristic produce).

Craft industry

- a) Location inside the DOC wine production area;
- b) Traditional craft industry and products with strong local characteristics;
- c) Guided tours, explanation of the production processes involved;
- d) Display of prices and notification to the Management Committee;
- e) Information about the Wine Roads.

Vine and wine museums

- a) Location inside the DOC wine production area;
- b) At least a half-day (4 hours) opening time per week, as agreed with the Management Committee, recommending opening times and days;
- c) Ability to organise lessons or visits with explanations of the local wine production; Unique exhibits and comprehensive materials and information about local wine production.

Provincial and local authorities, Chamber of Commerce, Tourist Agency

- a) Road signs, maintenance of infrastructure, etc.
- b) Membership of Wine Roads, sharing of aims and methods;
- c) Promotion of Wine Roads within the framework of regional and local by-laws;
- d) Promote and support information centres along the Wine Roads; promotional materials, information and advertising;
- e) Co-ordination of promotional activities for tourism and wine tourism with initiatives for the Wine Roads organisation;
- f) Notify opening times;
- g) Inclusion of Wine Roads in tourist guides and other promotional materials for the area;
- h) Promote Wine Roads during Exhibitions and special events;
- i) Encourage upkeep of rural architecture.

DOC wine consortium and National Wine Exhibition

- a) Provide technical support to the Wine Roads Organisation;
- b) Maintain contacts with entrepreneurs to involve them in initiatives and investment opportunities;
- c) Monitor the Wine Roads;
- d) Promote the Wine Roads Organisation;
- e) Co-ordinate international, national and local promotional activities of the Wine Roads Organisation.

Vine growers and wine makers Associations and Organisations

- a) Disseminate aims and methods of the Wine Roads Organisation;
- b) Improve quality standards and facilities;
- c) Promote training through professional training institutes;
- d) Maintain contacts with entrepreneurs for investment opportunities;
- e) Monitor the Wine Roads.

Local economic, cultural and tourist associations

- a) Carry out work inside the territory of the Wine Roads Organisation, including with independent delegations;
- b) Represent interests associated with the wine and food industry;
- c) Inform by means of trained personnel.

Professional schools in the sectors

- Develop wine culture and quality, organic farming techniques and quality brands (DOC, DOP, etc.);
- Teaching units dedicated to the culture of East Veneto and its characteristic wines and products;
- Organise work placements with members of the Wine Roads Organisation;
- Co-operate with local authorities, associations and institutions.

The network should not be only local

Networks can be set up in a variety of ways and can be given formal status or not. Generally they do not try to promote an individual product or service but recognise the advantages of creating an overall service package for tourists, the need for innovation and quality.

In Italy, associations of this kind are generally very active, carry out numerous surveys and disseminate information widely. Some are based on the wine industry. Here is a list, with their functions.

Some of Italy's national associations

MOVIMENTO TURISTICO DEL VINO - WINE TOURISM MOVEMENT

- Founded in 1993 in Verona during the famous Vintilly show, it was set up as a non-profit-making association. Its activities include:
- organising shows and demonstrations whose aim is to give visitors an insight into wine and the places where it is produced, and to encourage awareness and enhancement of country heritage and hospitality, the final goal of which is the economic growth of the rural world (e.g. organising winery open days);
 - advocating more widespread attention to quality amongst those providing facilities for tourists in winemaking regions and along the wine road;
 - promoting as natural a lifestyle as possible, where attention is focussed on looking after guests properly;
 - creating standards of quality subject to ongoing assessment (certification). In addition to the wines, the host (winery) must also meet quality regulations (hygiene, actual training of experts to meet visitors to the winery, wine guides (the proposal was received by both Tuscany's regional authorities and the European Union, which has funded a number of projects);
 - support for winery owners wanting to open their doors to the public, and those wishing to be entered on a wine road;
 - information and its disclosure for guides, tour operators, those running tourist offices;
 - creating wine trails;
 - research: compilation of informational material on methods and procedures, advice, seminars;
 - updating site www.movimentodelvino.it
- The Movement currently has 700 members including producers, owners of wine shops and wine libraries, restaurants, travel agencies, journalists and experts, with delegations in all Italy's regions. It costs relatively little to join the Movement (fees start from €206.58). The fee varies from region to region depending on the promotional events calendar and advertising programme drawn up by the individual region. One of the greatest benefits is that members are entitled a mention on the association's website.
- The Movement also publishes a catalogue of member companies, distributed by the national administration office and featured on website www.wineaday.org

Enoteca Italiana Fortezza Medicea | Siena registered office
Segreteria organizzativa (admin office) c/o Trso srl via Cardassi 6, 70121 Bari ITALY
tel. +39 080-5234114, fax +39 080-5275510, email: info@movimentodelvino.it

• ASSOCIAZIONE NAZIONALE CITTA' DEL VINO - NATIONAL WINE CITY ASSOCIATION Via Masettana Romana 58/b - 53100 Siena, ITALY tel. +39 0577271556, fax +39 0577271595

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This association was founded in 1987 with a view to promoting appreciation of the actual wine product as well as the relevant wine producing region.

Today, the initiative boasts over 300 members, including various cities that have achieved eminence - being the birthplace of famous wines (e.g. Montalcino, Asti etc.) - and other less well known cities that are channeling their energies into producing wine and developing wine-related tourism to increase their notability and reap the benefits of success. The objective of the measures taken in conjunction with public and private bodies is not just to protect and control wine quality, but also to make the most of the area's cultural and environmental heritage.

Hence, its main areas of business are:

promoting wine-associated events, exploiting folk festivities on a gastronomic theme and producing mini guides and informational-advertising material to introduce people to the environmental-artistic resources and recreational opportunities offered by the area.

The association has recently intensified its activity, which now includes planning and providing organizational support for the creation of Wine Roads, with the co-operation of the Wine Tourism Movement.

The association is a member of Recevini, the European network of Wine Cities, which sets up and promotes undertakings funded by the European Community's taxpayers. It also publishes an annual guide and monthly magazine "Vino e Città" (Wine and City).

CLUB DEI TURISTI DEL VINO WINE TOURISTS CLUB

Even the so-called wine tourists have started to form associations in response to the great interest this new kind of tourism is stirring up.

The Wine tourists club was founded in the wake of the considerable success enjoyed by the winery open day event, *Carifine Aperte*. Through this national association, members can receive information on the various opportunities offered by wine tourism.

During *Carifine Aperte*, people were invited to join the club paying a membership fee of € 5,16, which entitles them to receive the club's quarterly magazine featuring wine trails and wine tourism gadgets.

For further information, anyone interested in gaining an insight into wine tourism can call the telephone number or consult website www.wineclub.org.
Telephone number or consult website www.wineclub.org
Phone tourists can also call +39/052/89225 for information on all associated wineries.

ALBO DEGLI AMICI DELLE CITTA' DEL VINO REGISTER OF FRIENDS OF THE WINE CITIES

Another option for wine lovers seeking to join a club, offering up-to-the-minute information on shows and events, is the circle of friends of the wine cities set up by the association of the same name.

ENOTECA ITALIANA - SIENA WINE LIBRARY OF SIENA

Fortezza Medicea | Siena, ITALY tel. +39-0577-288497, fax +39-0577-270717
This is a public institution founded in 1950 by the state. Its original objective was to support the DOC and Quality wines national market authority (Ente Mercato Nazionale del Vini a Demarcazione di Origine e Prejgio) in presenting the best national wines selected by a board of experts from the Enoteca itself.

Today, you can visit Siena's prestigious headquarters and see the display of over a thousand wine labels (the characteristics of each product are described thoroughly) and taste them guided by professional experts. Through the library, over 400 producers - generally small-medium farms and estates - can make themselves known to the sector's enthusiasts.

The Enoteca's other activities concentrate, above all, on promoting the product:

- taking part in relevant trade fairs and promotional events the world over
- managing wine shipments
- publishing articles in the wine-related press
- technical and economic studies to assess the offer in terms of quality and quantity.

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The network is still missing some of its nodes, of course, required to offer visitors accommodation and other tourist facilities. Even in France, it is generally agreed that there is still a shortage of some elements in the wine tourism network:

- operators offering accommodation and hospitality; these are actually scarce in rural areas, and hence need developing like entrepreneurs;
- suppliers of specific services, such as environmental and cultural guides, which are also missing;
- advertising and sales organizations: the local tourist board (there is not always one in the area and, if there is one nearby, it is generally specialized in other kinds of tourism), and tour operators on a national and international level.

The hurdle encountered, therefore, is not just the traditional one of incorporating different operators in a single system, but the problem of there not being operators in the first place. In actual fact, so far the "volume of traffic" is not high enough to enable dedicated organizations to be created.

According to the Héroult partners, the main form of association is the federation and voluntary organization approach when it comes to tourism-related products. This may concern the region's operators, who may make a financial contribution to help set up and run the infrastructures. Nonetheless, the region does have technical and financial partners who are committed to backing advertising as part of their institutional activities.

The downstream operators (TOs and tourist boards) handle sales and advertising, nonetheless benefiting from products that have already been created.

This means that production was taken care of by the local network and managed by it without external commercial or advertising restraints, with a networked form of offer². However, we have already mentioned that the network is not simply local: for now, we will quote media members (journalists, food and wine critics), restaurant owners and those selling typical produce elsewhere.

Some methods for organizing and consolidating a network entail creating products such as Exhibitions and Events.

Exhibitions and events.

Our initial definition determined that a wine tourist may also be someone who goes to wine exhibitions and festivals. Hence, this is a special, and often partial product whose purpose is to distribute and promote awareness of the wine product rather than the region. We can hardly say that this is a tourist product, of course, and is more aptly described as an attractive meeting for developing business, creating contacts etc. In other cases, events are organized in the area – some given a blank canvas and devised from there, others a part of tradition – created to attract visitors, promote local products, and get the population involved.

Events always stay in town for a limited time and sometimes the advantages drawn are superficial: the area becomes jammed, though this is one of the busiest times of year for the wine-related industry.

² see quoted text by Rispoli and Tamma

Instead of listing all the exhibitions on the theme, we will limit comments to some of the major events.

Some trade fairs in Italy.

- **VINITALY** International Wine and Distilled Products Show (Verona, early April) had approx. 120 thousand visitors. Turin's Wine Show is also an up-and-coming. **SALONE DEL VINO** c/o Lingotto Fiere di Torino, ITALY tel. +39-011-8644111 (15-18 November 2001)
- **EXPONOVINO** Wine, liqueur and grappa spirit exhibition (end of April) Longorone (Palazzo Mostre), via del Parco, 3-32013 Longorone (province of Belluno) ITALY tel. +39-0437-770340-557516.
- **SALONE NAZIONALE DEL VINO NOVELLO** National New Wine Show (Vicenza) Via dell'Ortofranca 16 Vicenza ITALY tel. +39 0444989111 (5 November)
- Italian wines tasting counter of Torrijano (November) in Torrijano (Province of Perugia), ITALY, organized by Torrijano's local authorities tel. +39-075-989801.
- In addition to the specific wine fairs, other events include Parma's **CIBUS** tour and Riva del Garda's **BITEG** that deal specifically with food and wine tourism.

Below, we will be taking a look at some of the events. Particularly worthy of mention is the **Cantine Aperte** (winery open days) event – from which, in a certain sense, wine tourism was spawned – and other events deriving from it. The idea was to make wineries into an attraction, to expose the oenological "seams" and to help citizens gain a better understanding of the wine world. It can also be seen as an example of how an effective network can be created and possible destinations promoted.

It was a resounding success, so much so that, on occasion, such experiences are hard to "sustain". Setup on a local level is sometimes fragmentary.

Cantine Aperte deserves an additional special mention...

The event is held on the last Sunday in May and sees tourists and residents alike the chance to enjoy an experience of great cultural and human interest. The event gives rise to numerous peripheral wine- and food-related initiatives.

From the 100 Tuscan wineries the event started out with, the last edition has progressed to a total of over 850 wineries opening their doors to more than a million enthusiastic wine tourists. Young people proved to be particularly interested (accounting for over half of the event's participants), flocking in on their own, in couples or in groups. Just think, the number of visitors in 1994 came to 150,000!

Those taking part in this country hospitality undertaking are not just looking to find out about the wine alone, but are instead interested in learning about the production processes, the winery itself and its surroundings, and the farmers and wine producers – and about the whole winemaking environment, seen as a repository of traditional and "genuine" values.

Are there other events? Let's take a look ...

Cella di stalla (cellars of stables)

This is an event organized by the **Wine Tourism Movement** and the **Wine Cities Association** involving over one hundred town squares, wineries and castles in historic city, town and village centres nationwide.

The event, organized to celebrate the enchanting night of falling stars in mid August, brings together a series of initiatives whose common centrepiece is wine. You can taste wines in the company of sommeliers and some of the most famous names in Italian wine production, whilst entertainment is provided in the form of concerts, historical processions and stage performances.

Whilst one objective is to introduce residents and tourists to good wine and the region's other typical produce, an equally important aim is to promote the philosophy that the pleasures of a good wine are associated with fine living.

During the last editions, some cities have given free rein to their imagination in organizing shows, some lasting a whole day, from jazz to period costume fashion shows and stargazing.

Benvenuta Vendemmia (grape harvest welcome)

This event is also organized by the Wine Tourism Movement. It made its debut this year on 12 September in Lombardy and the last week of September in Puglia. In Lombardy, approx. 25 farms and estates welcomed tourists for a huge grape harvest festival, which included tours of the wineries and vineyards in addition to a series of cultural initiatives and recreational interludes.

In the Veneto region, there are several events worthy of note (in addition to festivals etc.), particularly in the Treviso area.

Events in the Veneto region:

- Mostra Nazionale dei Vini di Pramaggiore Pramaggiore's National Wine Show, in May
- Apertura Eroteca Regionale del Veneto Opening of Regional Veneto Wine Library (first week of June, following the National Wine Show) Pramaggiore
- Festa dell'Uva del Veneto Orientale Eastern Veneto grape festival (first and second week of October)
- Mostra del vino d'annata Vintage wine show (March-May) Valdobbiadene (province of Treviso)
- Mostra del Prosecco Prosecco show (6 May-14 May) Vittorio Veneto (province of Treviso)
- Mostra del Vino Wine show (20 May-4 June) Cordenese (province of Treviso)
- Radichio e vini del Veneto Veneto chicory and wine (third week of January)
- Rassegna dei vini DOC Calli di Conegliano Exhibition of DOC wines from the Conegliano hills (26 May-6 June) Colosio (province of Treviso)
- Mostra dei Vini Superiori Flavie e Livenza Flavie and Livenza 'Superiore' Wine Show (22-30 July) Flavie and Livenza
- Mostra Nazionale degli Spumanti National Sparkling Wine Show 1-5 September Valdobbiadene (province of Treviso)
- Festa dei Vini Vindage Valdadige Wine Festival (7-10 July) Fivoli Veronese (province of Verona)
- Sagra del Vin Cinto Cinto Wine Festival (3-7 August) Villaverla (province of Vicenza)
- Ombratonga Treviso

III. PRODUCT CONSTRUCTION

We can now tackle some of the specific aspects of creating the product, using examples as well as looking into the questions of marketing and management.

QUESTION N° 22

What elements should a product include?

It goes without saying that responses must be tailored to the sensitivity of the operators: there is no single formula valid for all.

Quite the contrary, if it's formulas we're talking about, it is best to take into account the opinions and desires of the wine tourist:⁹ Italian wineries are perceived as being highly differentiated and, in 95% of cases, interesting or very interesting.

This effectively means that almost everyone interviewed affirmed that they would like to get to know another wine or visit another winery.

In this case, the majority of tourists states that – in addition to excellent wine and typical produce – they would like, as far as organization is concerned:

- > a tourist office offering information on wineries (over 40% of those interviewed);
- > a winery guide (35%);
- > group trips to be organized to visit wineries (between 20 and 25%);
- > approx. 10% of interviewees said they would like a tour operator for the whole trip.

What makes a product successful?

- the scenery, villages, accessibility of the area.

- the wine's reputation;

- image "of winemaking concerned with nature, tradition and innovation, in thoroughly enchanting surroundings (very old wineries) that have not been adulterated";

- historic attractions, minor or otherwise;

- the possibility of guided tours around the winery, with wine tasting and possibly wines for sale (guide with oenologist or owner); look around vineyards, production areas and cellars, and possibly an explanation of the various stages of production;

- typical food and drink and local crafts;

- accommodation provided outside and inside the winery;

- guide and information on the area and on its other attractions;

- advertising outside the area and on site, accessibility;

- local co-ordinated entertainment: existing events as part of a calendar;

- well-informed and well-mannered operators.

In more technical terms, therefore, we might highlight the following conditions:

- at least 1 winery open to the public every 10 km;
- winery accessibility (signs, decent roads, reception areas, adequate opening hours);
- accommodation: needs developing, given the shortage, and should be rated for quality (B&Bs, farm accommodation for tourists etc.);
- guides, reps, oenologists not just in the wineries, but for the whole system (e.g. for the Wine Road);
- availability of a reliable calendar of events for the area;
- shops, especially for typical produce (preferably with demonstration of how products are made);

⁹ From the previously mentioned survey conducted for *Citta del Vino*, presented in *Enoturismo*

image development and creation of furnishings, buildings etc. with a typical feel (attractive entry gates, without elements reminiscent of an industrial landscape).

The Tuscan example shows how these factors have given positive results:

- the name conjures up a strong image, even overseas;
- thanks to one/two qualities of wine of distinction;
- the network includes the region's various attractions and accommodation is abundant (advanced farm holiday facilities);
- links with the independent network (international travel agencies, journalists);
- important role of private parties;
- tourists from abroad already drawn to the area (Florence) and international tourism well developed.

As well as how private parties can create a product, utilizing the various elements. For instance:

- This package has taken its inspiration from Tuscan artists. The various cultural opportunities offered, apart from making it particularly attractive, provide the tourist with a truly unique and original experience.
 - located in a wine producing region;
 - accommodation provided in ancient country houses or renovated farmhouses in an old village → use of many alternative facilities to add authenticity and a "historic" feel to the experience;
 - cuisine typical of the Tuscan countryside and ample opportunity to taste wines and local produce → exploring its gastronomic culture, promoting appreciation of local produce;
 - guided tours to see works of art (Assisi, Arezzo, Siena) and scenery → introducing visitors to the artistic and environmental heritage;
 - seminars and workshops with live painting (borrowing inspiration from Tuscan landscape artists) → some personal skills training;
 - living as a team and involvement in social activities → communication and involvement in groups of people sharing the same interests.
- The result is an overall enrichment of the tourist, involving art, the region, and the individual's expressive abilities.
- Consequently, what we have is evidently a product with a high added value involving a whole host of local aspects, which therefore has a positive economic effect on the region. Moreover, the consumer is given a singularly rich opportunity to benefit culturally. However, the undertaking is still in its fledgling phase, meaning it is too soon to comment on the outcome. This initiative is highly likely to catch on provided it is backed by entrepreneurial and organizational skills and the target can be reached feasibly.
- The initiative is advertised on a leaflet; it has a date and a fixed price. Hence this product is being marketed.

In some cases, the product is extremely tourist-oriented and concentrates on entertainment value: from botanical gardens to virtual tours and educational experiences, though we are more likely to encounter such cases overseas than in Europe.

We will be looking at the Hérault examples below: a production department, not a tourist one, meaning it might be taken as a reference point for other Italian regions.

The French case:

The offer already existed in a few regions (Bordeaux, Alsace, Champagne, Burgundy), but not in the Hérault department, on an organised level at least, although a number of local operators present an offer linked to wine and wineries.

Current offers are linked to "images": castles for Bordeaux, Alsace for its flower-filled villages, Burgundy for the quality of its wineries, Hérault for its scenery.

The quality of the scenery acts as a backdrop for the creation of a range of products for tourists developed around the vine-growing and wine-producing heritage, its know-how and its sites worthy of interest.

The existing local offer had the following features:

- spontaneous offer, linked to a persistent demand, organised by local associations, to meet a precise demand;
 - emerging offer: relating to a number of specific requests, with proposals for stays, circuits and excursions even targeting a foreign clientele through brochures.
- Next, we have the network organization of local projects, which associate vine growers, wine producers and tour operators (Materrois, Chemin des Schistes, Chemin de Vartier).
- For instance, there are 16 wineries, 23 villages and three DOC (quality-marked) wines along the Schists Way (Chemin des Schistes). This is a trail strongly linked to the region and its specific geological features rather than an itinerary; however, there are also special events, botanical gardens, typical produce and a wealth of other local attractions to be discovered.
- Nonetheless, all this cannot yet be defined as a range of products for tourists as each group of operators only acts within its immediate local area.

In this regard, those responsible for the Hérault region believe the following points must be allowed for:

- the product cannot be limited to too small an area;
- consequently, an offer with the same attractions must be "divisible into different levels of quality in terms of services and costs" (4-star or 2-star hotels, or farm accommodation or B&Bs);
- this clientele is not usually interested in other activities that are often to be found in rural areas, such as sports.

The French hypothesis is to create 2/3 products for each segment. However, if there only a few elements to be teamed together (just 1 hotel, just 2 wineries, 2 farm holiday facilities), product combinations will be limited.

Hérault French product hypothesis: (Fiches produits)

- Mediterranean gardens;
- Rocks and vineyards in Languedoc;
- 5-day trail in wine country;
- Encounter with Hérault's wines and the area's protagonists;
- Wine and cuisine.

Mediterranean gardens	Rocks and vineyards in Languedoc	Encounter with Hérault's wines and the area's protagonists
Individual "enthusiasts": Couples, families with or without children	Individual "enthusiasts": Couples, families with or without children	Group of people in the trade (10/25 people)
3 days, 2 nights half board	2 days, 1 night (extended stay possible)	3 days, 3 nights full board
Fixed stay in 2/3-star hotel, B&B, campsite	Fixed stay in 2/3-star hotel, campsite, B&B (rating: 2/3 ears of corn)	Stay in 2/3-star hotel (tour?), campsite hotel,...
Itinerary suggested but not compulsory	Itinerary suggested but not compulsory	Prearranged itinerary

If we analyse the products, we find they all have:

- A target and some way of grouping consumers together
- a name
- a length of stay
- accommodation details
- a price
- a programme

Let's take a look at the practical aspects, after which we will check to see what services and resources are to be found in our area and so on:

QUESTION N° 23
What should the target clientele be and how should we go about attracting customers?

One of the choices influencing the way in which products are organized is the choice between individuals and groups, especially for wineries:

➤ **Groups** (which can be of different kinds) can be more easy to reach through tailored advertising, and to manage because they take up the facility for a limited period of time, though their numbers make them more demanding (need for reception spaces, control etc.). In this case, booking becomes essential (also applicable to other services), as does a means of transport large enough to accommodate the group, and a guide-*rep* to go along with them. More often than not, a group produces a smaller turnover through its purchase of bottles than the same number of individuals. Accommodation can be a problem if there is a shortage of available rooms: for instance, it is hard to get farm holiday establishments involved as they rarely sleep more than 15 (a restriction also imposed by current regulations). Signs and information on the local area become less important where such information is already given by the guides. Professional organizers are often called for even though groups (especially prearranged groups) sometimes organize the trip on their own. The Hérault's solution concentrates on prearranged, motivated groups: associations, connoisseurs, people in the trade (containing up to 25 people).

➤ **Individuals:** this kind of tourism is undeniably more conscious and motivated (and more likely to spend) meaning, on the other hand, that greater efforts are needed in terms of advertising, information, signs and the guide service supplied at the winery. The need to book ahead should be checked. For individuals, there are two tour options: the more frequent, especially for people already familiar with the area, is "DIY", the other is a tour organized through an intermediary (chosen from a brochure). Bear in mind that for this second kind of product, the individual wants to be free to do things in his/her own time, more so than on other kinds of holidays.

As for choosing the period and on what days accommodation and trips are to be organized, we need to allow for the previously mentioned differences between Autumn and Spring-Summer visitors and, above-all, to try and conciliate the production requirements and potential of the offer with those of the demand. The period chosen must be sensitive to the seasons as well as to the days of the week.

We know that Sunday is the classic day for day tripping - for taking out or leisure pursuits - and that short-break packages are more likely to be taken up over the weekend, perhaps over a Bank holiday weekend in Spring etc. However, these are very busy times of year and there are frequently no vacancies. This means that programming requires great care and operators wanting to be sure a package can be created must risk booking well ahead. In other periods, there will be more accommodation vacancies and places in restaurants, though potential holiday-makers are also less likely to take a break unless there is a particular event, bargain prices or exceptional quality involved.

If you want to miss the crowds and are catering to groups of people without work ties (e.g. former company directors), **weekend** breaks are not out of the question. Another factor worth remembering, however, is hotel room availability during the week: in many areas the outskirts of a production area, accommodation is limited and provided for business trippers only (this is the case in the Treviso area, for instance); in addition, some farm holiday establishments are not open to the public from Monday to Friday. Lastly, you should rule out the **extremely high season (August in Italy)** because during this period - where more people are inclined to travel because they are off work or school - other forms of tourism (beach, mountains) are favoured, and because rural attractions may be less appealing at this time of year.

On the time front, again, remember that the package's length of stay will have a big influence on target: you cannot hope to attract tourists from afar with a **weekend** holiday package where travel time is greater than the actual stay (unless it is an extension, or is organized around an exceptional event) and so on.

The **sale of typical produce** is also worth a mention: when selling a wine tourism "package", is it a good idea to include a case of wine in the price? We do not recommend this, unless the wine in question is a particularly top-quality and well-known label. Consumers prefer to taste and choose, and buy at will, both for themselves and friends back home.

The "Enoturismo" survey reveals that purchases are frequent, as we have mentioned, but that a customer rarely buys more than 12 bottles (though they are often good quality). Sometimes, other costs can be covered by sales at the winery, meaning this issue deserves special attention.

With reference to **attractions** and how they are incorporated in itineraries, based on both the French example and Wine Tourism Movement data, there must be **at least one winery open to the public every 10 km** and, during a break lasting a couple of days, there should be **between 2 and 5 visits** (preferably diversified). The area must not be too small. Advertising and information are crucial, especially when there are no major "tourist orientation centres", as is the case in rural areas.

Trails must be of good quality and feature various attractions, as is also recommended by the European Commission: in addition to wine, food and typical products, there should be **at least one event and one cultural visit** (which should not take too long): a church, a villa, a museum (possibly on country life).

Of paramount importance is that the **itinerary should not repeat itself**. As with bicycle touring routes, **loop trails** are to be preferred, returning the tourist to the starting point without ever going down the same track twice. When spending the night in a town or village, it must be possible to take a different route every day so as to create so-called **star trails**. The location of the overnight stay must be chosen so that all "spokes" are roughly the same length, i.e. that all attractions are at a reasonable distance (allowing for both the outward and return journey).

During tours lasting a few days, especially for groups (travelling on coaches), a circuit is a good solution. In this case, distances can be longer (e.g. 3-day Veneto wine tours). For trips lasting a number of days and covering considerable distances, overnight stays will need to be organized in different places. This entails a greater organizational effort.

Examples

Here is a classic example of a CIVIN Viaggi tour, Asil and Monterrat:
Day 1: Tourist reception in Asil in the afternoon, Aperitif, tour of Costigliole winery, evening meal, overnight stay.

Day 2: Tour of Asil. Lunch in restaurant. Tour of area south of the city in the afternoon. Stoppes for tasting of Moscato and Barbera at Canelli and Nizza M.A.O. Visit to museum of country life. Evening meal and overnight stay.
 Day 3: Tour of area north of the city, through the Grignolino vineyards. Lunch. Return to Asil and then home.

The programme covers a limited area, but involves a multitude of renowned wines.
 Another example might be the tour around **Conciglione**.
 Day 1: Reception, aperitif, evening meal and overnight stay.
 Day 2: Tour of Conegliano – school of oenology and guided Prosecco wine tasting. Lunch. Trip to Valdobbiadene, evening meal and overnight stay.
 Day 3: Tour of Treviso. Lunch and departure.
 These are clearly group trips (min. 20 paying customers), which combine cultural visits with meals and wine tasting. Customers travel in private coaches, accommodation is provided in 3-star hotels.

And how do I go about pricing? **QUESTION N° 24**

Pricing requires a great deal of attention because, in addition to determining proceeds, it is a fundamental marketing tool: it explicitly defines the quality of the product, gives it its market positioning and hence determines the target.

For wine tourism, pricing is a highly complex matter for various reasons, i.e. the number of operators involved and scariness of such holidays in package form. Hence the consumer price for bottles, restaurant meals etc. will be decided case by case. Prices may be distributed differently, and may or may not be allied (high price in restaurants as well as for bottles), but in areas of renown such as in the Sienese region, accommodation price levels are above average, as are wine prices. In other cases, this may not happen: where the wine is not yet seen as the main attraction, for instance, and is not the reason for the stay.

In addition, wine tourism currently lacks "definition" as a product, meaning it has no average prices for reference – unlike beach holidays, for which expenses average out at € 51.65 a day – or examples of a similar level that it can copy.
 When a tour operator is involved, it cannot offer extremely low prices owing to the small numbers and breadth of contracts, and hence transaction costs incurred.
 Last but not least, another factor is the cost of travel, which can be summed up as the time and money it takes the individual tourist to reach the destination. This then gives the total price of the final product. It is directly proportional to the perceived value of the area and its wine and, consequently, is a strong indicator of the area's "performance" and how unique it is.

The price of a wine tourism weekend must, above all, be competitive with other kinds of weekend breaks in other places, such as in art cities (unless accommodation is provided in top-rate hotels). An average price might be approx. € 258.00. CIVIN Viaggi (an operator in Alba specialized in DOC wine itineraries in the Wine City regions), for instance, proposed 3 days and 2 nights touring at € 232.40 (to which we must add the cost of reaching the place the itinerary departs from). A week costs approx. € 775.00. In top-class facilities, the overnight stay and 2 typical meals can cost € 206.58 for a weekend (without any organized tour). For some foreign operators (British), a week's cycling through the vineyards of the Rhone amounts to approx. € 1291.14. Prices for individuals or "customized" tours are very often higher and not stated straight away.

Is it wise to have a travel agency or tour operator organize the packages? In what cases? What can individual wineries, other operators and public bodies do? **QUESTION N° 25**

There is no black and white answer to this question though it does invite comment.
 The Tour Operator, as was also evident in the Hérault case, is the only business that can market the product through an extensive network. Nonetheless, there are few TOs in Italy dedicated to food and wine tourism, and those few offer products lacking structure (mere accommodation for rural tourists or suchlike). Even so, there are signs of renewal, like the Tour Operator recently founded by the Leader project (Leader Tour), or the Wine Cities operator.

The following Tour Operators work in the Veneto region promoting food and wine holiday packages in their local area as well as itineraries representing the food and wine of other regions:

- Piacere Viaggi, Via Veneto, 8/A, Soltomanina, Chioggia
- Parliament Travel Group, San Marco, 1864/156, Venice
- Viaggi Barzi, Via Verdi, 5/D, Candello (provincia of Treviso)
- Fabrizio Viaggi, C.so Porta Nuova, 11, Verona
- Valpolicella Viaggi, Via Campostrom, 114/a, Pedemonte (provincia of Verona)
- Gran Canal Viaggi, Via San Marco, Venice
- Gabritour, Via Milano, 9, Peschiera D/G
- Verours, Galleria Pelliccioli, 13, Verona
- Michela Viaggi e Turismo, Via Ponte di Pagnano, Asolo (provincia of Treviso)
- Clementina Travel Office, Via Castello, Venice

Source: Evolour – Agencies promoting food and wine tourism

In other cases, wineries, some restaurants or farm holiday establishments, and public bodies take the package's organization into their own hands. In most cases, in Italy, visitors organize their own holidays, including their "trip" around the wine country. Below, we have summed up a number of points in schematic form to help you assess what solutions are best under given conditions.

Wine tourism products and organization	
<i>Target clientele</i>	Solution
<p>For</p> <ul style="list-style-type: none"> > Foreigners (different language, or little knowledge of the region) > Groups with specific requests > Where attractions are not easily reached (not normally open to public etc.) or resources are lacking (particularly well-informed guide) > Tourists staying overnight > "General" tour groups 	<p>Package organized by travel agency-TO-specific office</p> <p>Under what conditions?</p> <ul style="list-style-type: none"> - Must deal with small numbers in certain areas, with little possibility of discounts; consequently, they must be: - highly specialized on the subject and have a wide range - very familiar with the area in question - Little opportunity for "generalized" operators to deal with the specific product; excellent opportunities if the tour of the winery is a "point of interest and purchase opportunity" as part of a wider ranging tour. <p>Contacts with:</p> <ul style="list-style-type: none"> • Wineries (with provisions for receiving) • Hotels

	<ul style="list-style-type: none"> Restaurants Offers (for group trips): guide – rep transport Advertising necessary through brochures
<p>For > residents in nearby areas or tourists already in the area (who do not need accommodation)</p>	<p>Local organization under these conditions</p> <ul style="list-style-type: none"> ⇒ Wineries open to public ⇒ Information offices ⇒ Mass media advertising ⇒ Brochures and signs <p>In the product:</p> <p>Flexible winery opening hours, guided tour conducted by proprietor or oenologist (private guide)*</p> <p>Option of booking (advertising of telephone number)</p> <p>There may be only one winery, but information must be available on services, events and what shops are open, all of which must be accessible</p>
<p>Questions</p>	<p>Multilingual guide may be provided by the individual winery or by its Association (or suchlike).</p> <p>Should consumers be asked to pay for wine-tasting sessions? Formally, they should not be, and this would not make a good impression on the customer.</p> <p>Enquiries and reservation requests can be made through a single call centre run by a special office (the Association's or other body) or by one of the winery's staff.</p>

when products are organized by the tour operator/travel agency, they also take all the risks. The operator/agency manages to sell the product effectively through its own network of agencies. Product control is carried out by the travel agency itself, which can choose to include or leave out certain stops or wineries depending on commercial needs, efficiency and budget requirements. If the TO is not a local one, though, it is unlikely to be sincerely concerned about the sustainability of the product for the region and the spreading of economic benefits. In addition, it is worth remembering that TOs generally formulate products for a part of visitors (estimated at around 25-30%), whilst others put the product together for themselves. Nonetheless, the mere fact that products have been organized and included in a brochure makes organizing the offer easier. Lastly, remember that a tour operator – unless it is a local one – will only get involved in areas where it discerns a profit opportunity.

when developed by a private party – a winery, perhaps with adjoining restaurant or accommodation – the problem with developing a product offering wine tasting + tours and services is still its marketing. The product may be very efficient because it is controlled in house. Nonetheless, any impact is concentrated mainly on the

private business, which must be in a position to cover organization costs with bottle sales. The remaining problem is professionalism and whether there are enough resources to provide visitor facilities and organize additional services (especially any outside the winery). In such cases, a tour of the local area is often not included in the product offered, though it may be suggested. The initiative of individual producers, however, is to be welcomed during the initial "launch" of the region as a holiday destination. All the same, it is quite frequent for a producer (e.g. Erno Capodistola in the province of Padua) to manage to concentrate a series of attractions and services in its estate: the winery, farm accommodation for tourists with typical food, wine museum, option of guided excursions, including horse rides. The owner has certainly made a precise choice geared towards tourism, an opportunity that often presents itself when there is also potential for investment and unusual innovation (independent contacts etc.). This is the direction taken by numerous farm holiday establishments and hotels in particular areas (often along the Wine Roads: see November's "Viaggi di Repubblica" insert), which offer packages with typical dinners (including cookery lessons) and tasting, perhaps teamed with painting and sculpting ateliers. The whole offer can be made into a package and sold at a price (€ 206.58 a week).

When a body or association undertakes the initiative (wine roads, tourist boards etc.), there is undoubtedly a chance for wider involvement of the region. Nonetheless, there is also the problem of marketing and bearing costs. These bodies must also see to quality control and check actual availability of services (guides, oenologist, actual winery opening hours) included in the recommended product. One of the problems is getting information out: should they be mentioned on the brochures and maps of all the wineries, for instance – privileging the system, the district – or on just a few, e.g. members of wine roads or those meeting certain requirements?

There is also the need to consider costs and possible proceeds.

The first kind of costs are incurred in conducting feasibility studies and getting the various operators involved.

These costs – which may or may not be monetizable – are borne partly as part of projects such as Leader, partly by public bodies, and partly by private parties. In the Hérait department, costs for the product's initial development phase amount to 53,000 Euros and include: studies, arousing interest, setting local operators and service suppliers into action, encouraging creation of the product's missing elements, and incorporating the whole in a network.

Costs, when dealing with small numbers, can be very high. The studies conducted clearly reveal that, in many cases, such costs can only be borne by making the estates and farms multifunctional.

Then there are costs deriving from the construction of the product once the decision has been made to enter the "Wine tourism" trade, creating the actual products. Part of said costs may be borne by tourist boards, whether local or specific to the product. The Hérait case also shows the need for a local control body.

<p>• Restaurants Offers (for group trips): guide – rep transport Advertising necessary through brochures</p>	
<p>For > residents in nearby areas or tourists already in the area (who do not need accommodation)</p>	<p>Local organization under these conditions ⇒ Wineries open to public ⇒ Information offices ⇒ Mass media advertising ⇒ Brochures and signs</p> <p>In the product: Flexible winery opening hours, guided tour conducted by proprietor or oenologist (private guide)* Option of booking (advertising of telephone number) There may be only one winery, but information must be available on services, events and what shops are open, all of which must be accessible</p>
<p>Questions</p>	<p>Multilingual guide may be provided by the individual winery or by its Association (or suchlike). ¹</p> <p>Should consumers be asked to pay for wine-tasting sessions? Formally, they should not be, and this would not make a good impression on the customer.</p> <p>Enquiries and reservation requests can be made through a single call centre run by a special office (the Association's or other body) or by one of the winery's staff.</p>

when products are organized by the tour operator/travel agency, they also take all the risks. The operator/agency manages to sell the product effectively through its own network of agencies. Product control is carried out by the travel agency itself, which can choose to include or leave out certain stops or wineries depending on commercial needs, efficiency and budget requirements. If the TO is not a local one, though, it is unlikely to be sincerely concerned about the sustainability of the product for the region and the spreading of economic benefits. In addition, it is worth remembering that TOs generally formulate products for a part of visitors (estimated at around 25-30%), whilst others put the product together for themselves. Nonetheless, the mere fact that products have been organized and included in a brochure makes organizing the offer easier. Lastly, remember that a tour operator – unless it is a local one – will only get involved in areas where it discerns a profit opportunity.

when developed by a private party – a winery, perhaps with adjoining restaurant or accommodation – the problem with developing a product offering wine tasting + tours and services is still its marketing. The product may be very efficient because it is controlled in house. Nonetheless, any impact is concentrated mainly on the

private business, which must be in a position to cover organization costs with bottle sales. The remaining problem is professionalism and whether there are enough resources to provide visitor facilities and organize additional services (especially any outside the winery). In such cases, a tour of the local area is often not included in the product offered, though it may be suggested. The initiative of individual producers, however, is to be welcomed during the initial "launch" of the region as a holiday destination. All the same, it is quite frequent for a producer (e.g. Erno Capodistola in the province of Padua) to manage to concentrate a series of attractions and services in its estate: the winery, farm accommodation for tourists with typical food, wine museum, option of guided excursions, including horse rides. The owner has certainly made a precise choice geared towards tourism, an opportunity that often presents itself when there is also potential for investment and unusual innovation (independent contacts etc.). This is the direction taken by numerous farm holiday establishments and hotels in particular areas (often along the Wine Roads: see November's "Viaggi di Repubblica" insert), which offer packages with typical dinners (including cookery lessons) and tasting, perhaps teamed with painting and sculpting ateliers. The whole offer can be made into a package and sold at a price (€ 206,58 a week).

when a body or association undertakes the initiative (wine roads, tourist boards etc.), there is undoubtedly a chance for wider involvement of the region. Nonetheless, there is also the problem of marketing and bearing costs. These bodies must also see to quality control and check actual availability of services (guides, oenologist, actual winery opening hours) included in the recommended product. One of the problems is getting information out: should they be mentioned on the brochures and maps of all the wineries, for instance – privileging the system, the district – or on just a few, e.g. members of wine roads or those meeting certain requirements?

There is also the need to consider costs and possible proceeds.

The first kind of costs are incurred in conducting feasibility studies and getting the various operators involved.

These costs – which may or may not be monetizable – are borne partly as part of projects such as Leader, partly by public bodies, and partly by private parties. In the Hérault department, costs for the product's initial development phase amount to 53,000 Euros, and include: studies, arousing interest, setting local operators and service suppliers into action, encouraging creation of the product's missing elements, and incorporating the whole in a network.

Costs, when dealing with small numbers, can be very high. The studies conducted clearly reveal that, in many cases, such costs can only be borne by making the estates and farms multifunctional.

Then there are costs deriving from the construction of the product once the decision has been made to enter the "Wine tourism" trade, creating the actual products. Part of said costs may be borne by tourist boards, whether local or specific to the product. The Hérault case also shows the need for a local control body.

Are there any examples of products that I can follow, or any particular information?

We have already pointed out that if a product is to be constructed effectively and efficiently, we need to work by **target segments**. We have come up with a number of hypotheses – any of which can actually be found in the area of Eastern Venice – and have specified the various characteristics of some whilst, for others, we have concentrated on the most interesting elements only. Based on information already furnished, you can start thinking about how to construct the product, how it should be priced, where and how it can be advertised and sold. Asterisks (between 1 and 4) are used to rate the product's probability of success.

Product for seaside tourists on the rebound:

Characteristics: tourists already staying in a nearby area who might also be interested in our product. Hence, they might make a day trip lasting a few hours, in the period May to September (probably except the period 15 July-25 August). They may travel by car. The product can be for individuals or cater to groups. Often in a foreign language (German).

Period: May, June-early July; September.

Product elements: a) multilingual leaflets with itinerary and location of wineries to be handed out to hotels etc. and tourist information offices in seaside, spa, lake or mountain resorts; b) option of booking (give telephone number); c) signs; d) typical cuisine and opportunity to purchase quality produce; e) wineries open to the public with wine tasting and tour of the winery and vineyard (will need guide who speaks the language); f) possibly events, or music.

If you are planning **group** trips, you will need to add: g) group organization and advertising; h) shared transport (may not be by road; for instance, a river boat or bicycles); i) snacks.

Costs: for individuals – costs of advertising, visitor facilities and guides; for groups – organization and transport costs.

Operators whose involvement is required: operators on the coast or at other destinations, wineries, public bodies, sellers and producers of typical produce.

Rating: *** this product has much potential, given the number of tourists on beach holidays and where they come from (in the Veneto region, there is a huge influx of Germans, a people with an interest in food and wine). However, as things stand, it is hard to get this undertaking off the ground judging from previous experience and the Hérait region's comments.

Prospects and measures: Nonetheless, action is needed to promote information on the area and product awareness. This may be achieved, for instance, by

- Creating wine shops and points of sale
 - Establishing supplier relationships with restaurant and hotel owners in seaside resorts
- with a view to drawing off-season visitors.

There is an opening for "afternoon group excursions", possibly with a cycling trip and stop-off, or tasting sessions on a river boat.

Objectives: to get people to come back at a different time of year; purchases; to enrich the tourist's holiday experience.

Product for residents in neighbouring areas

Characteristics: people who are already familiar with the area and do not need to stay overnight. They travel in their own car, on their own, with the family or with groups of friends. The product is generally put together by the visitors themselves who choose the itinerary to meet their personal requirements, basically favouring wineries, restaurants and events. There is no need for independent organization or to assure accommodation. However, information beforehand through the mass media and, on site, through signs is essential, as is the actual opening of the wineries (possibly with a telephone number for bookings, which should be suitably distributed: handled by the association – Freephone number – or individual winery).

Tourists may even be of the "hit and run" kind. They are attracted by:

- Purchase opportunities
 - Events
 - Places where they can eat out and influenced by word of mouth and the personal experiences of friends and relatives. However, there needs to be an excellent quality/price ratio to ensure that people will return or recommend the product to others.
- The product may be enhanced with a tour of the vineyard and wineries, and recreational activities; snacks and tasting.

Possible measures: advertising using local means; ensuring loyalty to the product purchased; improved awareness in use of wine (storage, complementary foods) with ad hoc explanations and material.

Period: all year, with different goals.

Rating: **/*.** Product that is "easy" to construct, though not a particularly innovative one. It has a good probability of success provided standards of quality and positive word of mouth are maintained given the emergence of new destinations (and new sources of supply).

Product for prearranged groups staying overnight

These can be split into two categories:

- "on demand": this is a tour organizer package, i.e. based on the demands of the tourist who puts the product together with the tourism professional, requesting special tours. This product calls for organizational flexibility, though it may result in greater profits.
- "turnkey": as you would find in regular brochures (and for groups put together ad hoc), though aimed at specific targets that have already formed groups at home, united by shared interests and motives: divisions of the Italian Alpine Club, Lions, Italian academy of cuisine; company recreational groups; former directors; cooperative members; schools; and - In the French case - even people in the trade

(restaurant owners etc.). Nonetheless, it must feature distinguishing elements (in price and contents).

Product characteristics: accommodation, possibly in more than one location

Length of stay: 3 days/2 nights (generally over a weekend)
In case of groups of people no longer working, possibly during the week.
Note that, in this sense, the product might specifically target schools of various description (not just schools of oenology).

Product elements: variable depending on the kind of target group, though with a common denominator. Some packages may be more "educational", with explanations on wines, ageing, bottles etc., whilst others may favour the leisure value, placing more emphasis on gastronomy, and so on. Time spent at the winery may be given varying importance.

Operators whose involvement is required: all suppliers of local services (restaurants, accommodation) and neighbouring areas; link with other DOC (government control of origin and production) areas; guides and reps; tourist offices for advertising purposes; cultural attractions, possibly of an unusual nature.

Rating: ** this is a positive, tailored form of tourism, with the whole region reaping benefits, though it calls for a considerable organizational effort.

Product for groups put together on site, for a number of individuals

Economies of scale can be achieved with this, the most traditional "holiday package". It focusses on "classic" destinations, hence managing to group people together based on shared interests, or on sufficiently famous events. It must have an added value (to set it apart from "DIY" solutions) in its organization, in its ability to reach attractions that would otherwise be fairly inaccessible and, of course, in its image and name.

In the case of wine tourism, you cannot afford to have too large a group owing to the previously mentioned problems of restricted accommodation.

Product elements: brochure, reservations centre, agreements with suppliers, outstanding attractions. It is worth noting that the distribution of brochures and information may be costly compared to the potential number of tourists (undeniably on the low side).

Rating: **. The product is developed along the same lines as a Tour Operator's normal package, though it must contend with the fragmentation of the offer and a relatively low demand.

Product for specific, motivated tourists (staying overnight)

Characteristics: this target is the one we previously described as "priority", consisting in enthusiasts, people interested in the wine experience, its qualitative aspects, and local resources (art, culture) as a whole. They may even travel some distance to take part.

Product elements: accommodation, restaurants, tour options; at least 2/3 wineries to visit; quality of the scenery; artistic elements; accurate information; advertising in

accredited publications and websites; signs indicating the whereabouts of wineries and other elements.

Operators whose involvement is required: people in the media and opinion leaders to create notability and image; all suppliers of local services, and producers of typical produce.

Rating: **/**. Not easy to put into practice, but definitely worth the effort. Growth may be slow.

Product for organized tour stop (possibly mass tourism)

Stops in typical shops are often used, even in tours abroad, as a way of promoting contact with local produce and typical wares, and as a "shopping" opportunity, though quality is not always authentic. They are usually quick stops based on programmes or decisions made by the tour leader rather than on what the tourist actually wants. Groups may be numerous. Atteliers specifically geared towards the tourist (space, personnel who speak the language) are often favoured. Wares may be purchased - though tourists will rarely spend a great amount - the experience may not be a memorable one and little attention may be paid, given the tour's other attractions, though sometimes the impact may be positive. A recommended direction for anyone near roads travelled on major itineraries, with extensive space and hence anyone already focussing on mass tourism. Economic impact and inclusion in such circuits, as well as advertising in the major operators' brochures, may be positive anyway.

Rating: **/**. It may be fairly easy to put into practice in the Veneto region, though impacts are harder to govern (winning loyalty etc.).

Product for "ethnic tourists": This is a sensitive target though, numerically speaking, a declining one. For the Veneto region, "emigrants" have been classic consumers of local wine: a bond with their (generally rural) origins maintained through the product purchased out of loyalty. Today, ethnic bonds are actually attenuated in many cases, though it might be worth hypothesizing a tourist product that, on the one hand, will enable people to relive rural experiences and, on the other, to see what progress has been made. In this case, the appeal will lie in the tour of the farm and in the opportunity to enjoy group meals with typical foods and possibly the dusting off of some tradition - even for specific, rarer targets, such as the descendants of emigrants in South America. A warm, welcoming approach is a must.

Are there ways to control quality? Who should be in charge?

QUESTION N° 27

Quality control, and checking that prices match and that service levels are homogeneous, is critical for the success of the tourist experience proposed. However, the variety of operators and elements involved makes control particularly difficult, especially in rural environments and with farms and estates that do not monitor developments on the tourism market routinely, and have different production and organizational demands compared to facilities in a typical tourist area.

Nonetheless, quality control is essential, and can be implemented by various bodies in a variety of ways: the most important thing is that they be reliable and representative bodies, and that assessment is made in a coherent manner (Marking, or rating: three ears of corn, two wine glasses, one bunch of grapes). In some cases (see the TIC's "Guida Turismo del Vino" Wine Tourism Guide), wineries are rated according to the national wine library, or based on whether they are members of associations (making the rating more of an accreditation than "certification").

If quality is poor or wavering (or does not give a good quality-price ratio), it will be the market that selects the products anyway: though costs – in money terms as well as in terms of image – will most certainly be higher.

IV. PRODUCT PROMOTION AND ADVERTISING

We have already mentioned that the philosophy of tourism based on "typical" and oenological produce is to promote the region through wine, and wine through the region.

Advertising is therefore two-way, i.e. one form concerns the wine (more frequent) and the other the region, which is more tourism-oriented. Before you start, it is best to decide which path you intend to take, what the planned results are, and what action is currently being taken.

What promotional and advertising measures are being taken right now?

QUESTION N° 28

Would-be operators should analyse what they are doing, and what other people in their area are doing, and how. These measures require much attention, and it is always a good idea to keep an eye on what neighbours and the competition are up to. First of all, though, let's see how tourists interviewed in the winemaking areas by the Wine Tourism Observatory (or other surveys) learned about the region.

In most cases, information came from friends and relatives (30-40%), followed by wine-related guides, television programmes and newspaper articles, though there were those that had discovered the region through maps and advertising. Travel agencies and tour operator brochures played a more important role for foreigners (10%), than for Italians, as did schools. The tourist offices' contribution was instrumental, especially for Autumn travellers.

This means that the reputation and attraction of winemaking areas is built on a series of information – supplied at various levels and with different objectives, and by different bodies – contributing to creating the image. Advertising in its true sense was not quoted as one of the main sources.

Promotion and advertising of Wine Tourism is nonetheless highly important and, to date, has been implemented in a "variegated" manner. It actually takes various directions:

- a) with wine-related advertising (of a particular label, or more general). This kind of advertising can be controlled directly by producers. In this case, you can choose different messages;
- b) with advertising on the local area. It may be direct or indirect, and is not immediately controlled;
- c) with advertising by "uncontrolled" publications on wine tourism (e.g. Touring Guide on Wine Tourism in Italy, or on gastronomic tourism) or on websites;
- d) through local events;
- e) by taking part in exhibitions in Italy and abroad.

However, operators do not always appreciate the potential of these instruments or have any control over the information given. We will examine this aspect in greater detail. Remember, though, that the main question to be answered is ...

What do I want to promote/advertise? What is the best way?

It is worth remembering that there are various kinds of advertising: for instance, to achieve the following objectives:

1. the informational kind, which may aim to provide information on
 - the existence of the product
 - its technical, functional properties
 - how it can be used
 This is essential before purchase, during use (if enjoyment is to be satisfactory), and even afterwards.
2. the persuasive kind, whose goal may be:
 - notability
 - purchase/consumption
 - to make the product memorable and enhance its value (adequate advertising may convince the consumer of the worth of the product purchased)

Tools can be summed up as follows:

- Advertising that is paid for
- Educational, public relations
- Shows and exhibitions (wine-producer shows like Vinexpo, Vinitaly, for wine, BITEG, Cibus Tour, BIT for tourism, outside the region) or local food and wine festivals drawing people to the region
- Mention in Guides: Touring Club Guides, Gambero Rosso wine guide etc. (through advertisements, special mentions or invitations etc.)
- Events (*Carntine Aperte, Calici di Stelle*)
- Mailing
- Brochures, leaflets
- Local information and signs (remember that signs are a fundamental component of the Wine Roads, as also dictated by regulations)
- Information points and various other visitor centres
- Initiatives in the point of sale (shopping centres, wine shops etc.) in Italy and abroad
- Tour operator/travel agency brochures
- Participation in a network and membership of institutions like the Wine Tourism Movement, or Wine Cities, or Wine Roads
- Other initiatives (labels etc.).

Any of these tools can be used by various people: from the individual winery to private operators in the tourism trade (hotels), from associations to public bodies on various levels (tourist board, agriculture inspectors...). Consequently, it is vital to verify how work is **coordinated** (graphics and contents) and divided up.

In addition, you should bear in mind that, whatever the case, advertising is implemented on two levels: the institutional one, abroad i.e. by the national or regional public body; and the specific product level, which must be carried out by the travel agency dealing with incoming tourists, restaurant-hotel, winery or, more specifically, by the Wine Road authority.

For the Hérault area, general public advertising works on vast regions: Hérault-Mediterranean. Within this extensive frame, we can zoom in on the region and its wines, though there are no specific publications as yet. Nonetheless, a road map on the theme is in the pipeline. Stands are also set up in a series of exhibitions in the main tourist catchment areas (USA, Japan, Northern Europe and large French cities). Subsequent publicizing and sales are carried out through tour operator brochures.

Below, we will attempt to analyse some of these methods briefly, pointing out their features and possible results:

- **Mass media advertising (to be paid for):** advertising is widespread but, of course, comes at a very high price. Might be useful to increase notability. Nonetheless, this kind of advertising only works for a mass product and wide target segments: it is not recommended for small numbers. In addition, advertising that has to be paid for is perceived as having a low degree of credibility. Radio and newspapers can be used to reach certain areas of the public. Generally, they are used to advertise events. For wines, as well as for tourist destinations, the message generally has two focuses: one regarding the product's qualities and one regarding evocation, suggesting positive situations that can be reached through an image "within the audience's grasp". It is all about convincing consumers that the product can meet their explicit and implicit requirements.
- **Advertising (to be paid for) in target-audience magazines:** less expensive and reaches a more pinpoint target, meaning it may have a lower contact-cost. In addition, in some cases, the potential consumers' demands and motives are more explicit. However, you must choose both the means and message carefully, whether selling wine or a region. Whatever the case, clarity is the key.
- **Educational and public relations:** any of those activities aiming to give opinion leaders on various levels a good impression so that they will spread the word on the positive qualities of the product (journalists), or propose the product directly, in turn, through their businesses (travel organization, restaurant owners). Such action is very important as you are reaching groups that, in turn, may generate a form of advertising that proves much more credible than any you would pay for, effectively triggering consumption mechanisms, increasing notability etc.. Nonetheless, you have little control over the outcome using said tools, whose results cannot be guaranteed, especially if you are dealing with a professional opinion leader. You also need to "keep an eye" on information passed on as errors and simplifications are commonplace. To sum up, these people need to be offered a high-quality and thoroughly unforgettable experience that is also consistent with what the area offers on a "day-to-day" basis (you want to avoid the risk of so-called overpromise, i.e. creating expectations that cannot be fulfilled in the end. This can happen if an opinion leader is offered a product of better quality than that normally obtained by the visitor).
- **Personalities and celebrity endorsers** lodging in the area are useful when they get newspaper coverage, and their chosen holiday resort or preferred place of residence (see Tuscany's fame brought through British celebrities) is mentioned. This results in increased appeal and notability on an international level; a kind of "quality hallmark". Again, product control must be thorough and cover all possible aspects (safety etc.).

- Advertising through exhibitions and shows: this kind of advertising is typically carried out by both wine producers and tourist boards and travel enterprises. Hence, you need to confirm which kind of show you should concentrate on and with what kind of stand. It goes without saying that tour operators and potential tourists will only be reached through tourism trade fairs though, nowadays, there may be an opening for tourism even in shows dedicated to production. Within each category, you can find major shows – in Italy and abroad – and specific shows on emerging tourism, wine and food etc.. The show's venue is also important as it shows attention is focussed on a certain market. From a costs and organization point of view, remember that public bodies generally look after transfers and booth space, which is then divided up amongst associations, Wine Roads etc.. Even at tourism events, there may be a chance of wine and typical produce tasting sessions.
- **Mentions in main guides.** Without a doubt, this is one of the main ways of promoting awareness of wines and a particular region. For instance, the TCI "Turismo del Vino in Italia" (Italian Touring Club's "Wine Tourism in Italy" guide) gives an introduction and description for DOC areas – where the government controls origin and production - for each region. Then there are general chapters per province and a more detailed look at specific itineraries. Information is provided on where to stay, where to eat and, above all, where and what to drink, with the occasional report on what attractions the various places have to offer. Note, however, that Lison Pramaggiore is entered in the chapter on the Treviso area. Next, there is a list of wine cities – with a calendar of local festivals – and a list of producers with information and pictograms. 3 producers have been mentioned in the section on the Annone region. We recommend you find out what publications are commercially available (and their pros and cons), and talk with their compilers – if only to avoid blunders (which are not uncommon, unfortunately) – indicating news and giving the place a clearer identity.
- **Mailing to individuals or groups** (enterprises etc.): this tool is generally already used for providing information and selling wine and foods. Its effectiveness will depend on how reliable the list of addresses is, which must be targeted, as well as on the kind of product being offered. For instance, it is easy to promote a tour of a winery including tasting, proposed by a single producer, or a holiday package put together by an agency. In such a case, the product is already entirely under control (fixed times, price etc.). On the other hand, with more general mailing intended to promote tourism, and hence featuring less structured proposals, a range of options might have to be given before a choice can be made. Nonetheless, it is only a good idea to resort to mailing when an actual offer is to be made and when there is a good chance the recipient will be interested in or sympathetic to the product. A classic example of a mailing target might be companies, or even consumers of particular goods (purchase of wine or other products, subscribers to certain magazines etc.).
- **Initiatives in the point of sale, in Italy and abroad.** This is a frequent course of action for tourism. The Veneto region, for instance, takes tourist products into large European supermarket chains (especially German ones), setting up displays that might sometimes be linked to other products made in Italy. In France, holiday packages in particular areas where the wine sold is produced are promoted in a major chain. In various countries, shops selling organic foods are used as vehicles through which tours of the relevant production areas are advertised. This is quite common practice, therefore, and must be orchestrated by the various parties

- concerned. It is fairly important to promote tourist products in keeping with the foods being sold, the type of shop and the target (price etc.). Such initiatives evidently have great appeal abroad given the reputation of Italian cuisine. In Italy, they are organized in conjunction with "regional cuisine weeks" in some restaurants, hotels or shopping centres. The importance of wine shops for this kind of promotion is not to be underestimated. One remaining question is whether to promote a destination in a generic manner or whether previously organized products can be sold (see above). In this arena, co-marketing, advertising contests etc. are viable options worth considering (so as to give a holiday in wine country the same status in the consumer's mind as a holiday in the Maldives).
- Advertising through **information offices in the region** and also on access roads: this is an essential practice and, as mentioned earlier, entails singling out who should be in charge (normal tourist boards or specific visitor centres for wine tourism, as is the case for Maremma in Tuscany) and determining what kind of information should be given (just on members, or on all options). What counts is that all the region's bodies (council offices etc.) have enough information to give to visitors.
- Information through special **guides** (hardcopy or multimedia): these might be tourism-related – with a description of art, history etc. – or more practical (calendar of events etc.), possibly depending on the target (visitors from nearby or farther afield), or more closely linked to wine, its consumption (what foods it goes best with, how to store it, what glasses to use), and its production. These are informational elements of a different nature, some with more of an advertising slant, others intended for people already in the region. For the moment, uniform instruments seem virtually impossible. What we do suggest is that you always combine descriptions of attractions with information on services (where to stay, where to eat, what means of transport to use etc.) to adapt the tool to the visitors' actual needs. Lastly, an effective, easy-to-read map is a must (indicating wineries and how to reach them, which is not always an easy task).
- Advertising through **tourist boards or bodies established for the specific purpose.** We ought to point out that national or regional tourist boards – as in France – concentrate on advertising large areas, and distinguishable regions, and only then do they focus their attention on particular areas or themes. Hence the Hérault department, for instance, benefits from general advertising intended to attract given markets from abroad. Within said markets, priorities are established – i.e. Tourism and Region. Maps are on the way to explain how to reach places of interest and promote awareness of the region, indicating wine-related attractions.
- **Tour operators** advertise through their own brand, and market/provide information through brochures that "sell" the individual products (by theme or destination). They consequently exploit the network of agencies. Advertising a product through programmes of a tour operator specialized in rural or food and wine tourism etc. may be entirely different to that achieved through another kind of tour operator. Remember that a facility (or even a place) may acquire fame merely thanks to its selection and inclusion in a brochure. An interesting fact: for its brochure on Italian holidays, TUI (the largest European tour operator) has preferred the picture of a farmhouse for the cover rather than a seaside or art city shot.

We will finish off with today's hottest form of advertising and information: the Internet. Website presence is simply a "must" though, here again, nobody can afford not to check its effectiveness and whether information is complete and easily accessible. There are only a handful of farms in the Eastern Veneto region on the main sites so far (which are more readily reached than those of individual producers or destinations, with the exception of the more famous names).

Wine tourism on the Web

There are numerous sites on wine and wine tourism to be found on the Internet, though they often favour one over the other.

The associations mentioned so far each have their own site:

- The Wine Tourism Movement's site is: www.movimentoturismo.it. The site is well structured and offers up-to-date news on the subject (also see online magazine "Girovino news"). Its contents range from statistical data on the development of production to the list of the movement's regional chairpersons, from a showcase of typical regional produce to events that might interest producers and enthusiasts.

The site's own search engine is an interesting feature, letting you locate wineries throughout Italy. It is split into regions. In each region, you can find who is taking part in the *Cantine Aperte* event.

A mention in the site is one of the services offered to the Movement's members.

- www.wineday.org

This is the official site created especially by the Wine Tourism Movement for the "Cantine Aperte" event. Written in two languages (Italian and English), it furnishes information on the association's activities and, above all, provides a comprehensive list of all farms and estates taking part in the "Cantine Aperte" initiative.

Searches can be launched on a regional, national or worldwide level (with information on places on all five continents).

All producers who open the doors of their wineries to tourists on the usual day in May are included on the regional list.

It should be noted that the page where the individual addresses are entered is not customized, and is instead the same for each region.

You can email enquiries on a specific region using the email addresses given (e.g. veneto@wineday.org, lombardia@wineday.org, etc.)

- www.italianwine.it

Site of Italy's National wine library. An online wine shop.

Simply enter a few keywords in the search engine (e.g. wine+road or movement+wine etc.) to find sites of the various operators advertising over the Internet.

- www.wine.libri.it

You can also access the Wine Tourism Movement with its initiatives through this site. This version is in English only. This site is concerned more with sales than tourism-advertising, and offers a list of wineries and information on how to purchase wines (You can also find answers to such questions as: how to buy, where to buy, and what to buy).

- www.ero.it

The site is thorough and comprehensive, concentrating on advertising/information rather than on the sales side of things. It provides information on wine and the region with a detailed list of in-depth data.

- general calendar of events

- real-time updates on coming events

- interesting geographical feature with map of wines in Italy and the rest of the world, a list of associations divided by region etc.

- the manual (i.e. a beginner's technical guide to wine (production, storage techniques etc.)

- the wine exchange, an interactive message board (advertising job vacancies, wine sales, requests for technical advice etc.)

- the amusing "wine in art" sections (poetry, works of art etc. inspired by wine) and the "women's reserve" (space for female wine enthusiasts and lovers of fine living).

- www.terradoscana.regione.toscana.it

This site, created by the Tuscan regional authorities and Arisa (regional agency for development and innovation in the farming-forestry sector), is a good example of coordination between public and private operators, in this case relating to a specific region. It is split into three parts:

- farm holidays in Tuscany

- the Wine Roads

- ancient trades of Tuscany

The most interesting part for the purpose of this paper is the Wine Roads section. On entering this section, you are presented with a complete list of committees and associations that have set up roads in Tuscany.

E.g. the "Chianti Colline Fiorentine" wine road committee, e.g. the "Colline Lucchesi" wine road.

Each promoter has its own logo that you can click on to enter the area and gain further information.

The site's components are consistent and exhaustive: a map of the road, the proposed trails, the association's details so that you can contact them for further information.

There is an interesting link to the provincial site proposed by each individual association in charge of each road.

- www.wineroads.com

Another list with wine roads in Italy.

- www.vinid.net

An online wine magazine with information on accommodation, wine shops and libraries, and restaurants.

- www.veronelli.com

Three extensive sections on wines, restaurants and stops including detailed articles advertising the various options and advice from experts.

- www.golbigocconda.it

Another showcase with a wide range of information on wine and winemaking areas.

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Each product goes through various phases. In which does my area, my estate fall? What prospects and scenarios are there?

We thought a useful conclusion to this excursus might be to provide food for thought in the shape of a chart, summing up the life cycle of the "wine tourism" product. All products have a life cycle, and tourism is no exception. If progress is positive, the cycle goes from the planning and launch phase (where consumers are few and far between) to the development stage (in which the product makes a name for itself on the market, acquiring customers) and, finally, to an age of maturity, where the rate of growth of sales levels out. At this stage, there may be a decline leading to the disappearance of the product altogether (also owing to external factors) or to its rejuvenation and restyling. Nonetheless, there are many products that do not make it past the launch phase and fail to develop: in some cases, they stay on the market, surviving on minimum numbers whilst, in others, they are abandoned by their creators. Each stage involves different costs and measures. For tourism, the situation may be more complex, though it can still be roughly summed up with this model. In particular, for wine tourism, we can take into account the development of both wine production and the tourist offer. Below, therefore, a number of aspects are discussed, also referring to the final problems of the product's sustainability, with a view to also determining where the target referred to can be found and what its evolution prospects might be. (Stages highlighted in grey are those representing various scenarios).

The "Wine tourism" product's life cycle

Stages of the wine tourism life cycle	
Exploration	Rural life – Vine-growing and wine-producing firms in their early days. Tourism rare or non-existent, except for "pioneers"
Involvement	Satisfactory production, quality rewards. Vine-growing/wine-producing and bottling enterprises develop. Journalists begin to take interest. Number of visitors on an increase: wineries start to add the odd facility. People from outside the area start to purchase land and houses.
Development	Production increases. The area is included in guides. Services, wine-tasting rooms, public wine libraries and shops are created and marketing measures taken. Producers multiply. Independent investments grow. Attraction of tourists is effective, though with seasonal cycles. "Pioneer" tourists start to leave the area.
Consolidation	Vine growing and wine producing become the area's distinguishing feature (the place name becomes associated with wine). Mass tourism develops. Infrastructures are "occupied" by tourists. More traffic and noise. Some residents move away. "Exclusive" guides on the area are published. Small producers are taken over by large ones. Development of tourism ultimately leads to some land being converted from farming use, and prices rise. Some farmers sell their land.
Stagnation	Vine growing gives way to construction of towns. Tourism is still important though shifting towards other attractions

Decline	(which have mushroomed since the product started). Some residents flee the area. Less expensive areas are also sought for production sites.
Cooperation	Wine tourism in decline. Other businesses or other forms of tourism are developed. The area is almost completely urbanized. Remaining wine producers buy grapes in from elsewhere. The wine district weakens, costs increase. Vine growing is maintained: town planning limits urbanization. Wineries develop collective tourist plans so as to initiate working relations with independent bodies and operators. Conflicts between residents and visitors are limited thanks to communication and public commitment, though some still move away.
Preservation	The region is internationally recognized as a "wine" region. The landscape is preserved. A balance is struck between agriculture, urbanism and the tourist market.

Source: compiled based on Wine Tourism data, see bibliography.

This chart is based on international analyses, which focus, above all, on the case of California. Consequently, the same situations are unlikely to be repeated in Italy. The predicament of existing residents and businesses "clearing out" is much less frequent in Europe, and it would certainly not be fair to say that tourism goes hand in hand with the development of vine growing and wine producing, which has much deeper roots in our areas.

Nonetheless, dwelling on some issues is not such a waste of time. In some particularly popular areas (Tuscany), the buying of plots by people from outside the region and consequent revaluation of land can only be a positive sign if managed and controlled, and if steps are taken to ensure the places' original vocation is not changed.

CONCLUSIONS AND EXERCISES

This guide has attempted to bring to light a number of issues worthy of consideration - points that are fundamental if we are to venture into the realms of a new product (wine tourism) and know what we are doing. The product has received much attention, but has proved hard to put into practice in many areas. Nonetheless, this is the challenge we intend to meet together: creating a system, and getting farmers and service operators to work together is the only way to assure quality products that attract visitors and to create widespread benefits in the long term.

To meet this challenge, we need to be familiar with our own business, our own farm or estate, and what tools we already have or can procure: from shows to guides, models, methods, and examples of other areas.

Through the questions and information presented, we have aimed, above all, to promote dialogue, which is essential in building a tourist product: a product that depends on the action of many, and on the quality of the region.

Below is an exercise for producers and local operators based on a number of questions referring to the issues we have dealt with (from motivation to wine tourism, the construction of the product, advertising and the network). The answers should help you formulate thoughts on what measures are opportune in order to attain the objectives you have set.

For producers:

Could I sell more? At what price?

To whom?

What services do I offer to people visiting my winery? In general, what are visitors looking for?

What work am I planning for my winery or production systems?

What kind of investment would I be prepared to make to increase wine tourism?

What results would I like?

What bodies do I usually have dealings with?

And with what other operators in the area?

Have I collected advertising material from other farms or estates similar or different to mine in the past?

Do I have maps, do I know what events are held in the area?

Have I found out about other areas where wine tourism has been developed?

How did my visitors reach me? How did they find out about me?

In which "stage of the life cycle" is my farm or estate?

For those working in public bodies:

Can I give information on wineries to be found in the area?

And on events?

Are there signs indicating their whereabouts?

Are there other forms of advertising?

Is there a recognizable tourism demand? Of what kind?

For those working in local restaurants or hotels:

Do I offer typical dishes? And local wines?

*Who are my customers, and what brings them here?
Can I give information on wineries and their wines? And on events?*

The exercise need not stop here. It would be a good idea for each kind of operator to do the exercise on his/her own, and then to repeat the exercise all together. Setting up a system is a real possibility for wine tourism. It represents an opportunity for any region once it has decided that this is its vocation.

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