

A Niche Trend in the Tourism Market: *Wine Tourism in Italy*

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ABSTRACT

Although both tourism and wine are large contributors to the Italian economy and lifestyle, little is actually known about the practice of wine tourism as a niche sector. Academically, this niche tourism sector is extremely under-explored, and only a limited amount of information pertinent to the subject is currently available. This trend report will reveal an introduction to wine tourism, the history of its existence in Italy, its contributions to the economy, who the typical wine tourist is, impacts to date on the industry, and the anticipated future evolution. An analysis of current research determines that wine tourism in Italy has roots dating back to the Grand Tour in the mid nineteenth century, and in recent years has grown in popularity. Wine tourism has been regarded by Italy as a valid system for stimulating socio-economic advancement, and national laws regulate the wine and food routes. It is anticipated that the future of wine tourism in Italy will be largely shaped by the Internet, sustainability efforts, and a younger consumer and target market.

Keywords: *wine tourism, Italian wine, tourism Italy*

INTRODUCTION

Culinary tourism, also known as gastronomic tourism, can be defined as, “tourism where an opportunity for memorable food and drink experiences contribute significantly to travel motivation and behaviour” (Harrington & Ottenbacher, 2010, p.14). Culinary tourism, regarded as a niche market in the tourism industry, is classified under the larger sector of cultural tourism (Karim and Chi, 2010). Culinary tourism can entail a variety of activities including, but not limited to, street markets, food festivals, cooking classes, tasting activities, dining in restaurants, and quite predominantly in Mediterranean Europe- *winery touring and tasting*.

The following paper will both analyze and discuss the trend of wine tourism in the Mediterranean country of Italy. It will describe the niche wine tourism trend, provide a summarized historical perspective, detail the Italian tourism market, and more specifically

analyze Italian wine tourism. In finale, impacts on the industry, as well as future evolution will be discussed.

WHAT IS 'WINE TOURISM'?

As defined by Johnson in 1997, wine tourism is, “the visitation to vineyards, wineries, wine festivals, and wine shows, for which grape wine tasting or experiencing the attributes of a grape wine region are the prime motivating factors for visitors” (O’Neill & Palmer, 2004, p.270). Wine tourism may include visiting wine cellars, production facilities, vineyards, and tasting. Wine tourism may be pre-arranged as a tour involving air travel and group transportation along wine routes, or may simply involve driving by car to the winery of choice. The wine tourist may be regarded as, “any person, whether day-tripper or over night visitor, who engages in the act of wine appreciation while visiting a wine producing region” (O’Neill and Palmer, 2004, p.270). Common motivations of the wine tourist include opportunities to taste wine, gain wine knowledge, experience the winery atmosphere, pair food and wine, and to enjoy wine culture (Wine Business Online, 2007).

Internationally, the wine industry is estimated to be a \$180 billion sector that has been said to play an increasingly important role in rural development in countries such as France, Italy, and Spain (First Research, 2011). Countryside areas that would otherwise not see many travellers now experience an increase in employment opportunities, an increase in local revenues, and increased tourist inflow (O’Neill and Palmer, 2004). The aforementioned benefits allow for the provision of tourism infrastructure, thus propelling these regions even further into an economic tourism boom. In 2010, the wine producing regions in France, Italy, and Spain alone accounted for approximately 50% of the worlds wine production (First Research, 2011), as depicted in *Figure A: Worldwide Wine Production*.

Globally, wine tourism has only recently been acknowledged as a growing area of special interest due to its ability to create employment and economic activity (O'Neill and Palmer, 2004).

WINE TOURISM IN ITALY

The Italian Tourism Market

According to the United Nations World Tourism Organization (2007), Southern and Mediterranean Europe saw international tourist arrivals of approximately 165 million in 2006, and international tourism receipts of approximately €117 billion (approximately \$153 billion USD). More specifically, Italy saw approximately 66 million international visitors in 2006 (41 million of which were overnight visitors), and achieved €30 billion (approximately \$40 billion USD) in international tourism receipts (UNWTO, 2007). This means that in 2006 Italy accounted for approximately 40% of international tourist arrivals in Southern and Mediterranean Europe. Between 2008 and 2009 a decrease was experienced in both the growth rate of tourist arrivals and in total tourism receipts due to the global economic downturn (UNWTO, 2011). It was reported by the Rome-based central bank that during this downturn the average length of stay fell, along with average expenditure per trip (MenaFN, 2010). By 2010, “arrivals in Southern and Mediterranean Europe had increased by 3%, but were still short of their early 2008 peaks” (UNWTO, 2011, p.7). Although Italy still reported weak growth in 2010, it experienced overnight international tourist arrivals of 43.6 million and ranked third in terms of market share in all of Europe (UNWTO, 2011). Overall, it can be assumed that in the time period between 2010 and 2012 that these numbers have strengthened due to Europe's, and more specifically Italy's, global leadership in both inbound and outbound tourism.

The World Tourism and Travel Council estimate that the tourism industry accounts for approximately 4.2% of Italy's gross domestic product and provides approximately one million

jobs (Guizzardi and Mazzocchi, 2007). Italy is ranked in the top five destinations globally in terms of tourist arrivals and receipts, and holds a world market share of 9% (UNWTO, 2011).

Like most tourism destinations, Italy also experiences a variance in demand due to seasonality. A small dip in tourism demand is seen during the summer months from domestic travellers, offset by the slight increase in domestic demand during the spring (Guizzardi and Mazzocchi, 2007). Domestic overnight stays however, follow the typical seasonal pattern with large numbers of hotel/resort bookings in the summer months and low numbers in the winter months. With regard to international travel, a slight deviation from the typical pattern is observed with a reduction in overnight stays during the summer months offset by an increase in overnight stays during the spring and winter months (Guizzardi and Mazzocchi, 2007).

Although both food and wine are prevalent tourist magnetisms in Italy, other common tourist attractions include the Leaning Tower of Pisa, Galleria dell'Accademia, Assisi, the Colosseum, and Lake Como (Italy Travel Guide, 2012). Religious and traditional festivals, food festivals, and art festivals are also all quite common (Italy Travel Guide, 2012). Popular tourist attractions in Italy are largely historical, artistic and cultural. The cities most frequented by travellers to Italy include Rome, Venice, Florence, and Milan (Italy Travel Guide, 2012).

The History of Wine Tourism in Italy

“Wine is believed to have been produced in Italy as far back as recorded history” (Subden, 2010, p.210). As one of the oldest wine regions in the world, it is often referred to as an “old world” wine region, in comparison to regions such as Australia or California that are often referred to as “new world” wine regions. This old world region is believed to have origins in wine tracing back to between 4000 and 3000 B.C. (YourLoveofWine, 2011). It has been recorded that the Arabs and Phoenicians planted the first exotic vines in Italy, followed by the Spanish bringing vines into regions such as Sardinia and Sicily (Fagan, 1996). In the 8th and 7th

century B.C., the Mycenaean Greeks settled in Southern Italy, naming the region *Oenotira*- the land of the wine (Sanderson, 2011). During this time, nearing the beginning of the Christian era, the demand and popularity of wine increased drastically- particularly in Rome (Sanderson, 2011). The Romans are acknowledged as having a significant impact on the wine industry, making adaptations to the Mycenaean Greek methods by introducing the use of tools in the production process (YourLoveofWine, 2011).

According to DeBattista (2011, p.3) of the University of Malta, “the movement of people to visit vineyards dates back to the Grand Tour in the mid nineteenth century when wine became a special interest for travel”. However, wine tourism is a relatively new area for academic research, and as such, only a limited amount of information pertinent to the history of wine tourism is currently available (DeBattista, 2011).

The Current Wine Tourism Market

From its early roots in Sicily and Rome, the production of wine has spread rapidly across the country and is now produced in all 20 of the Italian provinces (Subden, 2010). It's Mediterranean climate and Winkler Regions of I through to V, make the production of wine possible cross-country (Subden, 2010). In the present day, Italy produces 54 million hectoliters of wine per year, ranking first place in production in the world (Subden, 2010). Italy's vineyard acreage currently consists of 842,000ha- the third largest globally (Subden, 2010). There are 18 major wine producing regions in the country, with Piemonte, Lombardia, Valle d'Aosta, Veneto, and Trentino-Alto-Adige, being listed as the major five (Subden 2010). *Figure B: Wine Regions in Italy* illustrates the top wine regions stretching from North to South, and East to West. Veneto was the most popular wine tourist region in 2008 with both the most arrivals and most overnight stays (Italian Statistics Office, 2008).

Throughout the past decade, wine tourism in Italy has not only emerged as an embryonic niche market, but has also expanded into a growth stage of development. Over the past 10 to 15 years the number of wineries in Italy has nearly doubled, from 1903 wineries in the year 2000, to 3909 wineries in the year 2009 (Asero and Patti, 2009). It was also reported that between 2007 and 2008 the number of wine tourists grew by two million in Italy, from 4.5 million in 2007 to 6.5 million in 2008 (Pasquini, 2009).

The creation of wine route packages in Italy has also emerged over the past decade with a national aim to share the winegrowing experience and both cultural and natural resources (Asero and Patti, 2009). Approximately 139 wine routes exist in Italy today, with a concentration in Veneto and Tuscany (Asero and Patti, 2009). In addition to these routes, annual wine festivals are also large tourist attractions, such as the *Open Cellars* event, drawing in over one million tourists in the spring season (Movimento Turismo del Vino, 2012). Italian wine and food routes (WFR) and wine festivals/events are a powerful means for developing the rural tourism market (Asero and Patti, 2009).

According to recently released data at the International Wine Tourism Conference held in February of 2012, wine tourism in Italy generates €5 billion (\$6.5 billion USD) a year (IANS, 2012). In a study conducted by CENSIS it was reported that for every 10 euros spent in a vineyard, 50 euros were generated in earnings for the local economy (ItalyMag, 2010). It was also reported by CENSIS that wine and food have moved into second place as the reason for travelling to Italy (ItalyMag, 2010). Lungarotti, the president of the Wine Tourism Movement, shares that, "Italian wine is not only a high-quality product, but an integral part of the history, culture and tradition [of Italy]" (IANS, 2012, p.1). Wine tourism in Italy has become a new large-scale phenomenon (Pasquini, 2009).

The Italian Wine Tourist

According to Michael Wangbickler, creator of the website Caveman Wines, a Certified Wine Educator, and a speaker at the 2012 International Wine Tourism Conference and Workshop, the largest mistake that business owners in the wine tourism industry make is not knowing their target market (IWINETC, 2012). In 2010, the majority of visitors to Italy were intra-regional, making up 87% of international visitors. The majority of these visitors were from Western Europe, and more specifically, 20% of visitors came from Germany ([2]UNWTO, 2011). France, Austria, and Switzerland follow Germany respectively in terms of international consumer market share. The next most common region of origin is the Americas, contributing 8% of international visitors in 2010. Following the Americas is East Asia and the Pacific totaling 3%, Africa totaling 0.73%, and the Middle East totaling 0.62% of visitors in 2010 ([2]UNWTO, 2011). Domestic tourists are also important to consider, as they comprise approximately 58% of total tourists in Italy (Massidda and Etzo, 2011). Domestic tourists are currently very price sensitive and demand low cost carriers, accommodation, and travel services, while taking service quality into consideration (Euromonitor, 2011).

In a study by Romano and Natilli (2009), four types of wine tourists in Italy are defined. The first, *Feast and Festivals Enogastronomic Tourist*, represents approximately 26% of the wine tourists and encompass those who enjoy traditional events, local food and wine, and visiting friends and relatives. They are young, highly educated, and social (Romano and Natilli, 2009). The second typology, called the *Gourmet Enogastronomic Tourist*, accounts for 25% of wine tourists. This grouping takes special care with regard to food and wine quality. They hold characteristics of being well educated with high paying jobs, and who see wine as a cultural product related to territory (Romano and Natilli, 2009). The third classification is the *By Chance Enogastronomic Tourist*, comprising 27% of wine tourists to Italy. This group is knowledgeable

of quality food and drink, but is not fussy. They range all age groups and are mid-level in terms of education (Romano and Natilli, 2009). The last typology of wine tourist identified by Romano and Natilli is the *Teetotal Enogastronomic Tourist*. Comprising 22% of wine tourists in Italy, these travelers are more so interested in gastronomy as opposed to wine. The quality of the products they purchase is very important. These tourists are an increasingly confined segment group characterized as adult females living in Southern Italy (Romano and Natilli, 2009).

IMPACTS TO DATE

Over the past few decades the production of wine in Italy has had numerous positive socioeconomic effects (Di Gregorio and Licari, 2006). As Di Gregorio and Licari (2006, p.6) state, “Its initiatives have encouraged new opportunities of economic growth and inspired the development of the sector in which it operates. Wine, together with local typicality, natural resources, cultural heritage, and sustainable tourism promotion, represents a valid system to stimulate socio-economic and territorial expansion” of wine tourism regions. However, the increase in development and revenues for Italy does not go without impacts. Regions in Southern Italy have seen as much as a 50% decrease in the surface area of vine-growing regions (Di Gregorio and Licari, 2006). In correlation, although Italy is currently ranked as the leading wine producer in the world, a decrease in wine production in the Southern region over the past three decades has been observed (Di Gregorio and Licari, 2006). Although Italy ranks high on the global scale in the wine industry, it is evident that the current methodology and supporting infrastructure in the South of the country have not been as sustainable as in the Northern regions. This depletion of resources will be of critical importance for future wine tourism planning in the Southern regions of the country.

Another implication that has affected the wine tourism industry in Italy is the National Law N. 268 of 1999 regulating the wine and food routes. The law was created with a mandate to

showcase the winegrowing vineyards and winery establishments, including cultural and natural resources, for the benefit of tourists (Asero and Patti, 2009). The law has helped to identify qualifying territories and create new wine and food routes. Law N. 268 institutes slightly varied regulations for identifying and operating food routes in different regions of Italy. Since the creation of this law in 1999, routes continue to develop, expand, and improve (Asero and Parri, 2009). This law however, is only one attempt at the effort to decrease the complexity of Italian tourism laws.

In the spring of 2011, a new Italian Code of Tourism was implemented. According to a news article written by Elena Pasquini (2011, p.1), the code was an attempt to “reorder and reform tourist legislation in a country where rules and regulations are so numerous and so complex that the sector’s development and competitiveness suffer as a result”. Unfortunately for the wine tourism industry, under the new Italian Code of Tourism, hotels are still not able to offer tourist packages to wine cellars (Pasquini, 2011). This legislation continues to restrict the purchase of wine tour packages to agencies and tour operators who require specific licenses (Pasquini, 2011). Although hoteliers and wineries have found ways to combat this barrier by creating partnerships and strategic marketing efforts, if such a regulation were to be modified so that hoteliers could sell wine tour packages, a drastic increase in the sale of wine tourism would likely result.

Even further is the issue that both the federal and provincial governing systems in Italy legislate the tourism industry. In some instances, coexisting laws contradict (Pasquini, 2011). Overall, the attempt at simplification of tourism laws in Italy has, for the time being, become more complex which may hinder progression.

ANTICIPATED FUTURE EVOLUTION

The popularity of wine tourism in Italy continues to grow, and tourism experts forecast that the wine tourism market is only operating at approximately 20% of its full potential, with the ability to grow at an exponential rate (ItalyMag, 2008). According to the Wine Tourism Observatory, the reason that this niche segment is not operating at its full potential is due to a lack of marketing (Pasquini, 2009). Magda Antonioli Corigliano, professor at Bocconi University, believes that the Internet and technology will be essential over the next few years, but so far has seen resistance due to an overall “cultural underestimation” of its ability (Pasquini, 2009). According to Corigliano (2002), an effective online presence and Internet marketing strategy are imperative in order for gastronomic tourism in Italy to reap a competitive advantage.

In 2002, statistics showed that only 47% of Europeans used the Internet at some point while planning a trip, and only a mere 23% of them actually purchased their trip over the Internet (ETC, 2002). In addition, Italy lags behind many key European countries in terms of Internet usage, and in 2010 only 52% of Italy’s population frequented the Internet (Euromonitor, 2011). A study conducted at Milan Polytechnic concluded that Italian tourism consumers are prone to using the Internet for research purposes and information collection as opposed to actually booking travel (Euromonitor, 2011). A low Internet penetration rate as a population characteristic suggests that there is also a low Internet penetration rate on behalf of Italian tourism suppliers.

According to Corigliano’s 2002 paper, Italian tourism websites host an abundance of information for web-visitors, but low e-commerce and customer relationship capabilities exist. Eight years later, in 2010, Euromonitor (2011) reported similar observations- that e-commerce is still at an early stage of development in Italy. Corigliano’s 2002 study presents the many advantages associated with improving Italian gastronomic tourism online, from increasing tourist

revenues to meeting a more diverse set of consumer needs. Euromonitor (2011) predicts that food and wine tourism will continue to grow in popularity, and that with a large web presence, niche markets can position themselves as leaders. With the release of Corigliano's early study and Euromonitor's observations and future predictions, it can be anticipated that the presence of Italian wine tourism online will increase and Italy will obtain many of the associative benefits.

It is also apparent that sustainability will become increasingly more important in the future evolution of the Italian wine tourism industry. In March of 2006, a consensus document was established between public and private actors of wine tourism in Europe to establish strategies and self-regulation for the industry (European Network of Wine Cities, 2011). The European Paper on Wine Tourism outlines many key sustainability initiatives such as in Section I, The Fundamentals of Oneotourism:

2.2. Territorial as well as wine-growing and wine-producing resources should be defended, preserved and carefully managed, as public wealth, in order to be able to be always available for the individual and economic use of all those living in the territory.

2.3. The use of territorial resources, and particularly of wine-growing and wine-producing resources, should not endanger the survival of the animal and vegetal species of the ecosystem.

2.4. The wine-growing and wine-producing territories should be efficiently defended and protected from the risks of an anarchic development of the urbanization.

(European Network of Wine Cities, 2011)

Wine producing regions elect whether or not to sign this paper- it is not a mandatory law or regulation. It is evident however, from the mere creation of such a document, that sustainability efforts are at the forefront of initiatives in rural wine communities, such as those that suffered acreage loss in Southern Italy.

A third force anticipated to guide the direction of the future wine tourism market in Italy is the realization of the increasingly more important Generation Y consumer. It is imperative for the wine tourism industry to capture the interests of this technologically savvy group of

consumers to secure a continued tourism boom in the future (Harpers, 2009). If marketing strategies are carried out effectively, it is projected that within the next ten years, Generation Y could account for approximately 8.9 million new wine consumers (Harpers, 2009). From these wine consumers, the Italian wine tourism industry must target the wine consumers who seek wine as an experience, as opposed to merely a beverage. If Italy can improve its tourism marketing and web presence as previously discussed, they will be better equipped to target this new imperative customer segment. In North America, trends toward a younger wine drinker have increased over the past 20 years; a prime target market for Italy (Getz and Carlsen, 2008). With an increase in interest from a younger consumer, Italy is likely to experience an increase in the number of younger travellers to their wine regions. As such, Italy will have to adapt their wine tourism experience to encompass a wider array of age groups and generations.

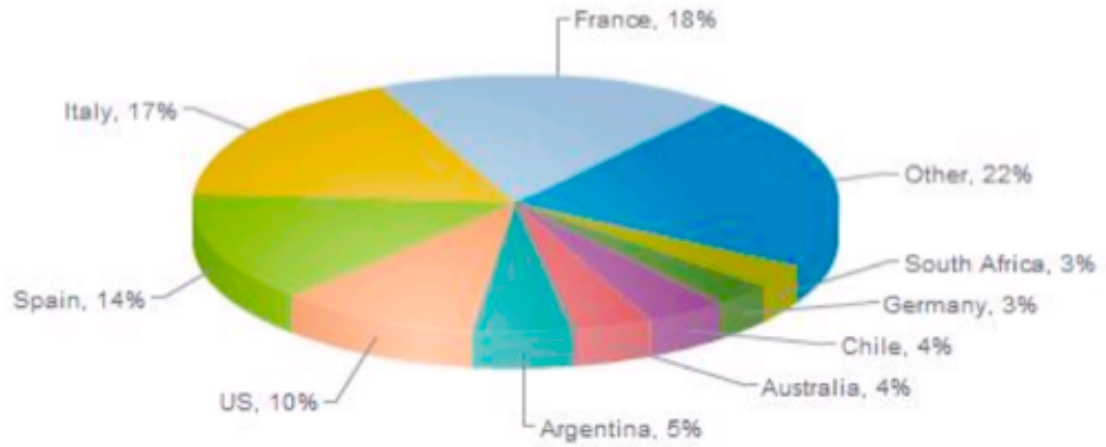
In conclusion, the niche wine tourism segment is a particularly new concept gaining in popularity. Wine alone has moulded Italian society into what it is today. Wine tourism is estimated to be generating billions of dollars for Italy, and the number of wine tourists in Italy is expected to continue to grow. Wine and wine tourism is integrated into Italy's legal system, economic system, history, and culture. The importance of wine tourism to Italy is evident through the numerous organizations that promote this form of niche tourism such as the Wine Tourism Movement; a non-profit association with aims to promote wine tourism, its image, and increase the economic development.

The future evolution of the wine tourism industry will be largely shaped by the Internet, sustainability efforts, and a younger consumer and target market. Future growth for the industry has been projected, but Italy must take a proactive approach and embrace the shifting market environment for these projections to become a reality. The proper exploitation of wineries and

wine-related events as a tourism commodity could have large economic benefits in the future for Italy.

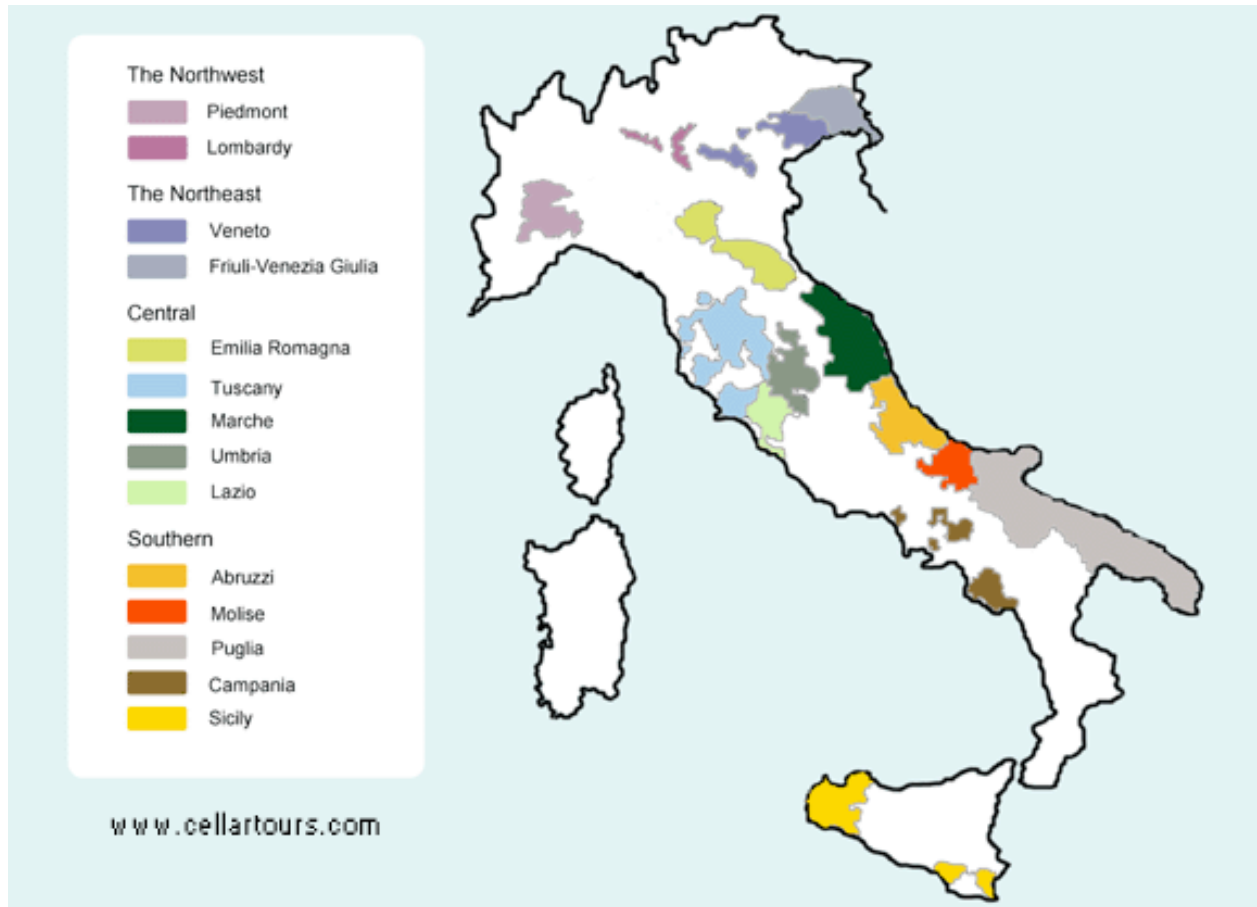
TABLES AND FIGURES

Figure 1
Worldwide Wine Production



(First Research, 2009)

Figure 2
Wine Regions in Italy



(Cellartours.com, 2011)

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