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Enotur: a new tool for information on wine tourism

This newsletter is published under the aegis of the Wine Tourism Competitiveness Reinforcement Plan for the province of Tarragona (CENOTUR - Pla de Reforçament de la Competitivitat de l'Enoturisme a les comarques de Tarragona) and co-financed by ERDF Priority 1. It aims to become a leading tool for communication in the field of wine tourism, providing strategic information to local businesses and institutions to aid in the decision-making process and to promote wine tourism assets. The publication will be offered in Catalan, Spanish and English to further this objective.

The newsletter will be published every four months and will provide information on the main wine tourism destinations worldwide as well as examples of good practices in the industry with detailed information on the wine tourist destinations in the 6 DOs in the province of Tarragona. It will describe market characteristics and trends based on analysis of a wide array of statistical sources. Furthermore, the newsletter will summarize any tourism management and policy issues which may affect the sector and recommend any reports or studies which may be considered relevant.

Several sources will be used to create the report: local, regional, national and international wine tourism organizations, including corporate, institutional, and mixed sources; expert wine tourism blogs; workshops and conferences; travel agencies; specialized media; observatories; market research companies, and more.

HIGHLIGHTS

Characteristics of a leading international wine tourism destination: the Autonomous Community of La Rioja (p. 2)

Diversity of demand profiles and the tourist experience, two key elements for adapting the supply (p. 4)

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La Rioja

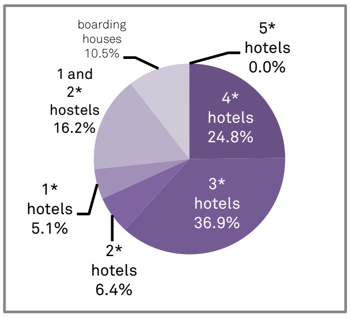
La Rioja is considered to be the foremost wine tourism destination in Spain and a world leader in the field[1]. It encompasses the territories of the Autonomous Community of La Rioja, but also parts of Álava and Navarre. This issue presents what the Autonomous Community of La Rioja offers wine tourists and its wine tourism policy

TABLE 1: Comparison of the three zones which comprise the Rioja Qualified Designation of Origin (DOCa).

	No. municipalities	No. hectares	No. wineries
La Rioja	118	42,247	305
Part of Álava	18	13,143	280
Part of Navarre	8	6,570	15
Total	144	61,960	600

Source: Regulatory Board of DOCa Rioja.

CHART 1: Distribution of hotel beds by category in the Autonomous of La Rioja, 2010.



Source: Compiled by author based on data from the La Rioja Statistics Institute.

Further information:

- ✓Official website of the La Rioja Turismo
- ✓Regulatory Board of DOCa Rioja
- ✓El Rioja y los 5 Sentidos project
- ✓El Barco del Vino project
- ✓Vinobus service
- ✓Museo de la Cultura del Vino Dinastía Vivanco
- ✓Tourism enterprises active in wine tourism: Riojatrek and Enoviajes
- ✓Wine therapy

The area of the Rioja Qualified Designation of Origin (DOCa Rioja) does not precisely match the borders of the Autonomous Community of La Rioja. The DOCa also includes some municipalities in the Basque province of Álava, and part of Navarre. In fact, although there are relatively few hectares of Rioja in Álava, it has nearly as many wineries as the entire Autonomous Community of La Rioja, and has a high degree of fragmentation (TABLE 1). The DOCa Rioja Regulatory Board has defined three distinct areas based on climate, soil composition and location: *La Rioja Alta, La Rioja Baja* and *La Rioja Alavesa.* These factors have defined the morphology of the vineyards' cultivation. The designation may be the oldest in Spain. It was officially recognized in 1925 and received the DOCa title in 1991.

Policy and governance

The Autonomous Community of La Rioja's tourism policy (below) has over the years aimed to strengthen and consolidate wine tourism as a leading tourism product. Proof of this can be seen in the creation and implementation of the Strategic Plan for the Development of Wine Tourism in La Rioja (*Plan Estratégico para el desarrollo del Turismo del Vino en La Rioja*). The regional government and *Rioja Turismo*, a public company founded in 2000, have implemented several measures to develop the sector, improve infrastructure, and create and promote wine tourism products. In terms of audiovisual materials, the television series *Gran Reserva* and the campaign *La tierra con nombre de vino* (the land with the name of wine) are two of the promotions that have helped position La Rioja. Other actions taken in the 2005-2010 period include plans to stimulate wine tourism clusters such as the ones in Haro and Logroño, demand satisfaction studies, the *Vinobus*, the San Asensio Centro Sensorial del Vino (Sensory Wine Centre), and open house days at wineries. Future policy will follow these same tenets. This course was chosen by the present government's electoral programme, which set out to strengthen and maintain the La Rioja wine tourism brand, especially in foreign markets, and proposed the design of oenogastronomic, cultural and nature-based microproducts. Other projects slated for the long term include the development of *the Barco del Vino* (wine boat) in Haro and the La Rioja wine landscape's candidacy as a UNESCO World Heritage Site in the Cultural Landscape category. Another example of La Rioja's institutional commitment to wine tourism is *El Rioja y los 5 Sentidos* (Rioja wine and the 5 senses), a cultural programme developed by the regional government which since 1996 has promoted wine culture in different areas (wine landscape, literature, theatre, cuisine), through activities such as concerts, lectures, plays and dance. This initiative was awarded Great Wine Capital's Best of Wine award in 2006.

Tourism product

Accommodation offered in the community is mainly concentrated in camping sites (45.7%) and hotels, hostels and boarding houses (46.5%).

Sources consulted:

[1] Cámara de Valencia (2010). *El Enoturismo (Wine tourism).*

COMPETING WINE TOURISM DESTINATIONS

TABLE 2: Comparison of wine tourism in the Autonomous Community of La Rioja and the Province of Tarragona.

	Autonomous Community of La Rioja	Province of Tarragona*
No. DOs	1	5 DOs and part of DO Penedès
No. hectares	42,247	25,277
No. wineries	305	296
No. visitable wineries of total (%)	26.1	28.0
No. hotel beds	4,664	60,255
No. rural tourism beds	1,067	2,334
No. inhabitants	322,415	808,420
No. km²	5,045	6,303

Source: Compiled by author based on official data from the Rioja DOCa Regulatory Board, the DO Penedès Regulatory Board, the Catalan Institute of Vines and Wine (INCAVI – Institut Català de la Vinya i el Vi), the Catalan Tourism Observatory (Observatori de Turisme de Catalunya), and others.
*Note: data for the Province of Tarragona is for the DO Tarragona, DO Conca de Barberà, DOQ (DOCa in Spanish) Priorat, DO Terra Alta, DO Montsant and part of DO Penedès. Data on accommodation, number of inhabitants, and square kilometres is for the entire province.

TABLE 3: Distribution of number of tourists in hotels in the Autonomous Community of La Rioja by autonomous community of origin, 2010 (%).

Community of Madrid	19.4
Catalonia	18.3
Basque Country	14.6
Community of Valencia	7.3
Aragon	6.2
Castile and León	5.7

Source: Compiled by author based on Survey of Hotel Occupancy of the Spanish National Statistics Institute (INE).

Accommodation in rural areas is relatively insignificant (7.8%).
The majority of accommodation is in 3 and 4 star hotels. (CHART 1).

One of La Rioja's differentiating features is its specialisation in wine tourism products. La Rioja Turismo places special emphasis on accommodation (hotels and rural accommodation) that have a differentiated product, whether for its location in a wine-growing area, the architecture, or services. This unique group of accommodation makes up 8.6% of the total.
La Rioja's key assets, its wineries, are classified into three different types[2]: the large estates with traditional late nineteenth-century architecture which are taking measures to adapt to wine tourism; the small family vineyards some of which are committed to wine tourism; and newer wineries which have a clear commitment to wine tourism. These last are characterized by innovative designs, sometimes by leading architects. An example of the commitment of these wineries to the new business strategy[2] is the investment being made to offer new services and facilities such as wine sampling menus in the wineries' restaurants.
La Rioja is also home to other architectural resources related to the world of wine, like its *calados* (underground wine cellars), *guardaviñas* (rural buildings similar to other dry-stone constructions in Spain) and *lagares* (wine presses).
In addition to offering specific accommodation, businesses specialising in other complementary activities (wine therapy, etc.) have begun to appear. Some of the activities on offer include being a farmer for a day, sport among the vines, and flying over the vineyards in a hot air balloon.
In recent years the number of tourism companies has increased, from 9 in 2006 to 23 in 2010[3]. Although there are no specific details, it would be logical to postulate a link with the growth of wine tourism. La Rioja is also home to a number of museums which complement wine tourism, including the Dinastía Vivanco Wine Culture Museum, the Sensory Wine Centre and the collection of popular La Rioja ceramics of Las Bodegas Darien.

Local demand

The different sources consulted[2,4] are in agreement that demand in La Rioja is primarily domestic and local, mostly from Madrid, Catalonia, and the Basque Country, and primarily for weekend and extended weekend stays (1.75 days is the average) (TABLE 3). However, in recent years (2006-2010), the number of foreign visitors has increased by 13.8%. To complement this more specific data, it should be noted that the wine tourism profile in La Rioja is in line with the profile for all of Spain, i.e. adults who travel in groups with family or friends, who are often used as a source of information. Their level of satisfaction is high and they generally do complementary activities during their stay.

Although some of its production is in other communities, La Rioja has implemented a tourism policy which, using its long tradition of wine production, specifically targets wine tourism. Its government type (an autonomous region) and the fact that it has a single DO have been favourable factors in the development of wine tourism in this leading tourist destination (TABLE 2).

Sources consulted:

[2] Sistema Riojano de Innovación and Turespaña. La Rioja Alta Innovative Business Group Strategic Plan (*Plan Estratégico Agrupación Empresas Innovadoras La Rioja Alta).*
[3] La Rioja Institute of Statistics.
[4] 2010 Spanish National Statistics Institute Survey of Hotel Occupancy.

Leading wine tourism services

Competition in supply and pressure in demand is forcing the industry to innovate in wine tourism services and facilities

> “The sector not only needs to adjust to the market, but also to define the specific segment it wants to target”

At a time when there is clearly more supply than demand in the tourist market, the sector not only needs to adjust to the market, but also to define the specific segment it wants to target.” The choice of this segment will depend on its growth potential, prior knowledge, and the investment the company wants to make as well as other factors.
Below are some examples of how businesses have been able to deal with changes in the level of demand.

More demanding visitors

Tourists are aware of the wide variety of options available on the market through multiple marketing channels (travel agents, online activities search engines, experience packs, etc.). The result of this exigency in the wine tourism sector has been more languages offered for guided tours, longer opening hours, personalised visits, and a higher quality of service.
In terms of languages, although the majority of wine tourism in Catalonia and Spain is principally domestic, leading tourist destinations focus more on the international market[1]. It is worth noting that audio-guided tours of the Torres Winery are offered in seven languages, tours at the Marques de Riscal Winery (La Rioja Alavesa) in three foreign languages and at Buil&Giné in Priorat in Russian, demonstrating the potential of this emerging market. Wineries’ schedules also have to adapt the behaviour of visitors.

It goes without saying that service must be offered on weekends, both morning and afternoon. Personalised service is generally an attraction for visitors who are usually in the medium / medium-high purchasing power range. In addition to regular group tours, Viña Real (La Rioja Alavesa) offers Premium Tours (at a cost of € 25) as well as picnics in the winery’s vineyards, and VIP Tours of the Torres Winery for people with some knowledge of the wine world (at €235 for groups of from 1 to 5 people). These are a few examples of this kind of specialization.

> “Premium Tour of Viña Real and VIP Tour of the Torres winery: examples of specialisation”

The degree of knowledge that prospective visitors have is another element that should be considered when developing tourist services (tours, tasting courses, etc.).
The sector needs to ensure that the quality of service is sufficiently high in all aspects, everything from tourist provision as such to the services and facilities provided by the destination (signage, public transport, etc.). This was one of the conclusions of a conference held in Vilafranca del Penedès[2].

The fact that there is no “Q” (for quality) certification specifically for wine tourism facilities is important, since this does exist for restaurants and rural tourism establishments. This situation is due to the relative newness of the sector. However, making a standardised certificate available would provide a competitive advantage for the sector.

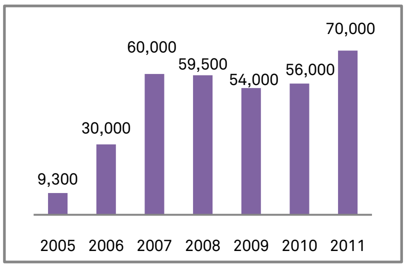
Sources consulted:

[1] Great Wine Capitals, key figures in world wine tourism, 2011.
[2] INNOVI and the Vilafranca del Penedès Town Council. Conference entitled “Success of Californian wine tourism due to the cooperation of companies and institutions” (*L’èxit de l’enoturisme a Califòrnia a través de la cooperació dels agents*), Vilafranca del Penedès, 14 November 2011.

GOOD PRACTICES

"Other segments, such as meeting and incentive tourism, and the organization of weddings have been identified and developed at several wineries"

TABLE 1:Evolution of the number of visitors to the Marqués de Riscal winery (2005-2011).



Source: general data provided by the Marqués de Riscal Public Relations Department.
Note: the new wine tourism complex was inaugurated in October 2006.

Further information:

- ✓Marqués de Riscal winery, Rioja Alavesa
- ✓Castello Banfi, Toscana
- ✓Ysios, Rioja Alavesa
- ✓Viña Real, Rioja Alavesa
- ✓Torres wineries, Alt Penedès
- ✓Turisme per a tothom, Turisme de Catalunya
- ✓La Rioja Turismo

Discovering new experiences

This is an activity that is not generally well known by the general public and one of the tourist products most associated with the senses and sensations. Marques de Riscal has made good use of this concept by creating a complex wine tourism model with the help of a great architect. Around the winery they have created a resort with an innovative design which is an experience for the senses. It includes a hotel of the Starwood hotel chain, three restaurants (one of which recently received a Michelin Star), a spa with treatments based on grapes and wine, a wine cellar, and a library. However, other strategies for smaller budgets, such as the creation of innovative activities based on the concept of developing sensory aspects, may be used in the operation of any winery.

A wide range of profiles

Although group visits with family and friends is the segment with the most demand, other specific segments should also be given consideration. In the medium term the market share of seniors and multi-generational families segments is expected to increase[3]. Other segments, such as meeting and incentive tourism and the organization of weddings, have already been identified and developed at several wineries.

Demand for the limited mobility segment is another element to consider. On the official Turismo de la Rioja website, potential customers can search for wineries that have facilities to meet the needs of disabled visitors. Also, Turisme de Catalunya's *Turisme per a tothom* (tourism for everyone) programme has certified that two wineries in Terra Alta and one in Baix Penedès have facilities adapted to meet this demand.

100% online

The Internet has become the most important communications media for both supply and demand. Mobile devices provide instantaneous communication when the current and potential clients find a destination. It is vital that wineries have a presence in social networks so that customers can have more information (videos of facilities on YouTube, reviews on TripAdvisor, Facebook, and Twitter pages which offer special deals to followers, are a few examples that are already used in the industry). The need for this can be seen in a search for wineries with Wi-Fi (5 wineries in La Rioja do) as well as the personalised services established, for example, between Marqués de Riscal and its Preferred Customers through the special promotions offered by the Starwood Preferred Guest Rewards Program. Tours are complemented with other activities such as discovering cultural, culinary, and natural assets of the destination. The sector is well aware of this facet of the market and most winery websites already offer tourist information about their region.

Investing is not everything

Although in recent years a number of Spanish wineries have made significant investments in infrastructure (Marques de Riscal, Ysios, Darien), a winery's success in wine tourism does not necessarily rest solely on improving its facilities. Perfecting services, personalised treatment, image, and the development of new activities are other avenues.

Sources consulted:

[3] World Tourism Organization (WTO), the European Travel Commission, European Cities Marketing, and the University of Vienna International Seminar on Demographic Change and Tourism, 2010.

OUR TOURIST DESTINATIONS

Wine tourism in the region of Tarragona

Ten counties are home to 5 DOs and part of the DO Penedès. This article presents an overview of the wine tourism industry in this area

The Province of Tarragona, which includes the tourist brands Costa Daurada and Terres de l'Ebre, is characterized by a remarkable level of specialisation in the wine industry. Eight of the ten counties that make up the province are part of different wine designations of origin. Landscapes covered with vineyards are ubiquitous. This has led to initiatives such as the idea to name the Tarragona region the *País del Vi* (the Wine Country). This area would encompass all of the territories of designations of origin (DOs) in the region.

The number of DOs in the territory is quite high considering its size. It is home to the DOs of Terra Alta, Priorat, Montsant, Tarragona, Conca de Barberà, and part of the DO Penedès (TABLE 1). To these we must also add the Catalunya and Cava DOs. This unique situation is the result of the region's history, landscape, climate, and soil. However, this has resulted in DO territories of a size which limits their ability to achieve international recognition, unlike larger European wine tourism destinations such as Burgundy, Bordeaux, and Rioja (TABLE 2). Viewed in this context, creating an integrated wine tourism area seems like a very reasonable idea.

Each of the DOs has several distinctive features which help to differentiate them. However, there are common assets that add value to the entire territory, including historical assets, specifically some of the older cellars known as the *Catedrals del Vi* (Cathedrals of Wine). These are *Modernista* (Catalan Art Nouveau) buildings from the turn of the last century which demonstrate the historic importance of wine growing in the region. From the point of view of their potential for tourism, these "cathedrals" form a distinguishing feature, as does the unique architecture of the newer wineries.

Differentiating the territory can be achieved not only through the grandeur of its buildings, but also through the diversity and quality of its wines and the land where they are grown. The wine tourism experience must not be limited to the inside of the vineyard; it must also include the natural beauty of the surrounding landscape and the rural enclaves among its assets. The value of this is demonstrated by the fact that the region's networks of rural roads are often included in the wine tourism products presented to tourists, and promoted by specialized wine tourism operators.

The regions' unique wines are the result of its combination of soils, microclimates, and vine varieties, some of which are exclusive to the area. These wines have gained international recognition in recent decades, which has positioned some of DOs in the territory, especially the DOQ Priorat, among the most prestigious in the world.

In addition to territory's attractiveness as a wine tourism destination, it is important to also emphasize the tourism aspects, which are consolidated under the Costa Daurada and Terres de l'Ebre brands. The region's long tradition of welcoming visitors has fostered a significant level of expertise, especially on the coast and in the province's DOs.

The counties of Tarragona have an enormous potential as an attractive wine tourism destination, a resource for and development of tourism activity.

TABLE 1: Comparison of variables in 6 DOs.

	No. ha.	No. of visitables wineries	Total capacity (hotels and rural accommodation)**
DO Priorat	1,888	25	21,066
DO Montsant	1,840	14	
DO Conca de Barberà	4,200	16	
DO Penedès *	4,461	1	
DO Tarragona	6,598	13	
DO Terra Alta	6,290	18	825

*Note: data for DO Penedès refers to the part within the Province of Tarragona.
**Note: data is for municipalities that are part of the DOs.
Source: INCAVI and internal sources of "Think Tank, Tourism and Leisure Science and Technology Park" (Parc Cientific i Tecnològic de Turisme i Oci).

TABLE 2: Comparison of competing European tourist destinations.

	Hectares	Visitable wineries	No. DOs
Burgundy	25,800	349	99
Chianti	10,500	313	1
La Rioja	61,960	79	1
El Penedès	24,248	32	1
Region of Tarragona	25,277	87	6

Source: INCAVI and official tourist destination sources.

OUR TOURIST DESTINATIONS

“The diversity and number of wine tourism destinations... has encouraged the creation of a policy of structuring supply based on generating tourism products that are easily identifiable by clients”

The combination of these two key factors is behind the structuring of one of the most promising wine tourism products in Spain and in Europe. The core principles on which this is based and which are being applied are as follows:

- ✓ Conditioning supply and developing services for visitors in the wine region.
- ✓ Developing qualified personnel to manage the wine tourism experience, both in the wine areas and general tourism.
- ✓ Developing tourist products related to wine culture. These include health treatments using wine, already common in spas and health centres in the region, and its adoption by some local restaurants to showcase wine products.
- ✓ Implementing marketing and communication campaigns, both at the DO and tourist product level, to help promote wine tourism products among specialized tourism operators.

Wine tourism is an activity that has seen rapid growth worldwide. But the wine growing areas of Europe, America, Oceania, and Africa first became leading tourist destinations in their local markets and only later international tourist destinations. Many of these tourist destinations are in advantageous competitive positions and have become first choices for tour operators and leaders in potential markets. This is the result of years of developing tourist projects related to the quality of their wine tourism product. The wine tourism destinations of the Province of Tarragona are on different levels in terms of their positioning in the domestic and international markets. So while some DOs are well positioned as important destinations, others are still in a nascent stage of recognition in the markets. The success of a wine tourism destination lies in knowing how to adapt its uniqueness and ability to receive tourists to a tourism project. These wine tourism destinations cannot mimic each others’ development model. Every destination has to define its own model and the level of tourist activity it wants. The different DOs in the province need to define a joint development model; this is what has driven initiatives such as the *País del Vi*.

The diversity and sheer number of wine tourism destinations worldwide has encouraged the creation of a supply structure policy based on generating tourism products that are easily identifiable by clients, such as wine routes that are grouped to highlight key aspects of the activity (TABLE 3). Right now, this type of grouping is spearheading the development of wine tourism products.

TABLE 3: Examples of wine routes.

Scale	Name of route	Promoter
Europe	European Wine Route	RECEVIN
Spain	Wine Routes of Spain	ACEVIN
Catalonia	*	*
Provincial	Lleida Wine Route	Mixed association
Regional	Priorat Wine Route	Turisme Priorat (DOQ Priorat+ DO Montsant)
	La Route Touristique des Grands Crus de Bourgogne	The Dijon and Beaune Chambers of Industry and Commerce
Municipal	Ruta Postals de Vinya (Vine Postcards Route)	Consorci Promoció Turística Alt Penedès

Source: Compiled by author based on official websites.

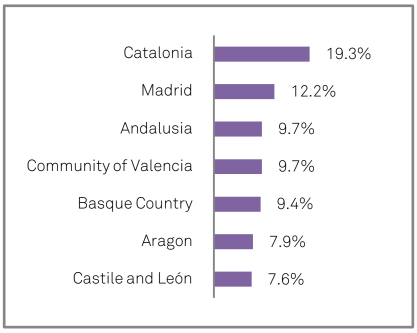
The Excellence in Wine Tourism Awards is a recent local initiative organised by the Business Confederation of the Province of Tarragona (CEPTA - Confederació Empresarial de la Província de Tarragona).

STATISTICS AND MARKETS

The profile of the wine tourist

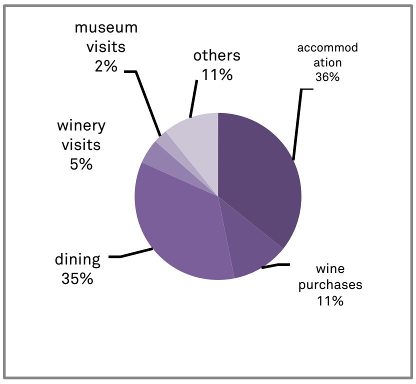
The importance of the domestic market and certain segments of market demand such as women or seniors and the preference for 4-star hotels are a few of the defining characteristics of this tourist

CHART 1: Primary source of wine tourists by autonomous community.



Source: Compiled by Think Tank (Tourism and Leisure Science and Technology Park) based on data from the ACEVIN report 2.

CHART 2: Average expenditure by item (in %).



Source: Compiled by author based on data from the ACEVIN report 2.

The wine tourism sector is currently conducting studies to determine what the differentiating characteristics of the typical wine tourist are. Below are some of the more significant findings of two reports on wine tourism at the territorial level. *Las cifras clave del enoturismo mundial*[1] (key figures in wine tourism) created by Great Wine Capital describes the views of wine industry professionals on new wine regions across the globe. The Analysis of Wine Route Demand (*Análisis Demanda Rutas del Vino*) [2] for the first part of 2010 created by the Spanish Association of Wine Cities (ACEVIN - *Asociación Española de Ciudades del Vino*) surveyed users of the Wine Routes (*Las Rutas del Vino*), a wine tourism product created by the association.

X-ray of the wine tourist

The market for wine tourism is local. In Spain 80.6% of wine tourists are domestic, with Catalonia being the leading source of wine tourists (19.3% of the domestic market) (CHART 1). According to a report on international trends, the proportion of domestic tourism is significant, although it is much lower than Spain's (about 40.0%). The largest exporting markets internationally are the Netherlands, the United Kingdom, the USA and Canada. In Spain, the German market plays a significant role, making up a third of all foreign visitors, while the Americans have the same presence as the French (12.6%). Depending on the origin of the tourists, the car is generally the most common means of transport (78.8%).

Internationally speaking the most significant age group is 36 to 55 (45.0%). The senior segment (56+) is also quite significant. For Spain[2], the figures are similar.

In international wine tourism, two-thirds of tourists are men and the rest women. In Spain, this difference is not as pronounced (55.0% men and 45.0% women). The market for women wine tourists is proving to be a strategic segment with growth potential, as is the senior market segment. In the women's market, pioneering initiatives are beginning to appear. The Focus on Woman travel agency[3] offers trips to Oporto with wine tourism activities that target women exclusively. Also, in recent years wine consumption by women has grown, which has led to the creation of wines specifically for this segment, fruitier wines with less alcohol.

As regards accommodation, 4-star hotels are the most widely-used in Spain (28.0%). Houses of relatives and friends also play a role. Expenditure by wine tourists is difficult to quantify, as there are important differences between wine tourism destinations and figures vary widely depending on the sources consulted. According to Great Wine Capital, tourists in the Tuscany and the Napa Valley regions spend a relatively large amount ($210 in Tuscany and $188 in Napa), while expenditure in La Rioja is much lower ($30). This represents the amount spent at the wineries, according to surveys of wine producers. If you ask users of *Las Rutas del Vino*, these amounts increase to an average of €127.10 per tourist (the general average expenditure is 100 euros/day/person[4]), which is the expenditure at the destination (travel not included). This expenditure is comprised of money spent on accommodation and dining (CHART 2).

Sources consulted:

[1] Conclusions taken from vinoturismo.blogspot.
[2] ACEVIN (2010). Analysis of Wine Route Demand, 1st part, 2010.
[3] http://www.focusonwomen.es/home.php.
[4] IET (2010). Survey of Tourist Expenditure. Egatur.

STATISTICS AND MARKETS

TABLE 1: Comparison of wine tourist and cultural tourist profiles.

	Wine tourists	Cultural tourists
Age	36-55	25-34
Companions	groups (friends, family)	couples w/o children
Average stay	1 night	2-3 nights
Time of stay	weekends and long weekends	weekends and long weekends
Average expenditure /day	€127.1 (upper median)	€135.4 (upper median)
Sources of information	recommendations of family/friends	Recommendations of family/friends and Internet
Activities	tour of wineries dinning wine tasting	monuments dinning shopping
Destination score	4.2/5	3.5/5

Source: Compiled by the author from various reports on wine tourist profiles [1,2] and from both the City and the City Break cultural tourism reports (*El Turismo cultural de ciudad/City Break*), by Turespaña, 2007.

"The most important benefits of wine tourism are improving the image and positioning of the winery, and increased income"

In Spain[2], wine tourism is generally done in groups consisting of friends, work colleagues, or family. The group size is usually between 3 and 5 people.

The primary motivation of tourists has gone from location and cultural heritage[5] to visiting the wineries in the area. The most common activities are closely related to the culinary and winegrowing culture of the region: visiting wineries (20.0%), wine tasting (15.0%), and tasting the local cuisine (15.0%). Other complementary activities such as vineyard tours or wine culture museums play a significantly less important role and are also activities seldom offered by wine establishments according to the international study (10.0% of respondents have no museum facilities).The overall score for *Las Rutas del Vino* was 4.21 of 5, with the landscape and hospitality receiving the highest scoring. In contrast, signage, tourist information, and value for money scored the lowest. According to ACEVIN the most visited Spanish destinations are La Rioja, Ribera del Duero, Penedès, Marco de Jerez, and Toro (Zamora). As far as international wine tourism destinations are concerned, Burgundy is the best known. However, it provides no data for leading wine tourism destinations like Toscana, Oporto, and the Napa Valley. This may be related to Spanish wine tourists' familiarity with the products. These tourists define themselves as conventional tourists (44.1%) or wine enthusiasts (36.0%).

In Spain the estimated average stay is 2.6 days which generally corresponds to weekend and long weekend trips. Internationally speaking, summer (70.0%) and autumn (15.3%) are the seasons with the most activity. Since the distance between the tourists' origin and destination is relatively short, 55% of those surveyed had visited the same destination between 1 and 2 times[6]. In fact, tourists' satisfaction with their experience is high, since 92.0% of respondents repeat visits. In terms of reservations, telephone (26.0%) and Internet (15.0%) are the two most widely used systems in Spain. Travel agencies do not play a significant role. However, 26.0% of respondents did not make prior reservations.

The recommendations of family and friends are the most common sources of information (31.5% of the total). However, according to the international study, destinations use different communications channels. European wine tourism destinations generally use traditional channels (fairs, brochures, official tourism offices) while destinations in the U.S., South Africa and New Zealand tend to use more innovative internet-related channels and social networks. The international market is aware of the benefits generated by this type of tourism. The most important benefits of wine tourism are improving the image and positioning of the winery, and increased income. Of the wine tourism destinations, Napa Valley seems to have most faith in their economic viability. A comparison of the studies shows that the wine tourism product is at an early stage in Spain. A significant portion of the demand is domestic, more than in other international wine tourism destinations, a high percentage make no prior reservation, tourists define themselves as conventional tourists, there is a lack of knowledge of other leading wine tourism destinations, etc. Despite this, it is a non-seasonal product with a high degree of reported satisfaction, with a level of expenditure that is higher than average tourist spending, and one that is complementary to other tourist resources, such as culture or dining (TABLE 1).

Sources consulted:

[5] ACEVIN (2010). Analysis of Wine Route Demand, other editions.
[6] Users with second homes were not considered.

POLICY AND GOVERNANCE

European wine tourism strategy

The sector has two strategic documents which constitute the basis for the development of wine tourism in Europe

TABLE 1: Definition of wine tourism according to the EU Charter[1].

Tourism and leisure activities devoted to discovering and enjoying wine, wine culture, and wine areas

Conducted between 2004 and 2006 as part of the EC Interreg IIIC South in order to improve coordination among the members of the European Network of Wine Cities (RECEVIN), the VINTUR project was intended to promote the exchange of knowledge and technology, and to develop actions to increase the quality of tourism products on offer. The result of this project was the development of the European Wine Tourism Charter[1] which establishes the European model for wine tourism, and the European Enotourism Handbook[2], a report that presents the sector's quality standards.

The European Charter and the Handbook

The Charter defines the concept of wine tourism at the European level (TABLE 1) and establishes a joint strategy for all of the wine tourism regions in Europe based on the definition of objectives and commitments of all of the areas involved. The report takes a broad view of the sector, emphasizing the concept of wine culture, an idea that encompasses both the wine growing aspects of a territory as well as its tourism. In following this philosophy, RECEVIN's report highlights wine as a product that represents a territory and a culture, going beyond the traditional concept of a quality drink. This vision and the possibility of using wine as a tool to market tourism is closely linked to the findings of the recent wine tourism conference held in Vilafranca del Penedès[3]. This overarching approach is a result of the wide range of parties which may adhere to the charter, including the public and private sectors as well as the inhabitants of the wine tourism destinations. It should be noted that some parties have described this document as a proposal that only addresses the absolute minimum, and is not sufficiently demanding.

Like any strategic document there are certain values that are predetermined: the sustainability of businesses activity and the promotion of local development; the need for the cooperation between the different parties; a collective vision; the promotion of renovation instead of new construction; the use of local human resources; and enhancing the quality of life of the local people. The document also mentions the need to manage flows of tourists, anticipating some corrective measures such as the use of collective transport, bicycles, and walking.

Adherence to the charter takes the form of drafting a report that could be seen as a strategic plan for a tourist destination comprising a diagnosis of the situation, the involvement of its members, common strategic objectives, assignation of required resources, a program of actions, and evaluation of the results. So far, 78 organizations have signed up, 64.1% of which are Italian and Spanish[4].

The same European project then developed the European Wine Tourism Handbook, which establishes the European Wine Tourism Quality Management System with an eye to the future European Wine Route project. This document which was inspired by the European Charter

"RECEVIN's report highlights wine as a product that represents a territory and a culture, going beyond the traditional concept of quality drinking"

Sources consulted:

[1] VINTUR, European Wine Tourism Charter.
[2] VINTUR and DELOITTE (2005). European Wine Tourism Handbook.
[3] INNOVI and the Vilafranca del Penedès Town Council. Conference entitled "Success of Californian wine tourism due to the cooperation of companies and institutions" (*L'èxit de l'enoturisme a Califòrnia a través de la cooperació dels agents*), Vilafranca del Penedès, 14 November, 2011.
[4] RECEVIN, information from the official website.

POLICY AND GOVERNANCE

"La Rioja is one of 9 tourist destinations in the international wine tourism association, while others such as Cambados, Utiel, and Montilla are members of the Spanish association, ACEVIN"

TABLE 2: Comparison of members of different wine tourism associations.

Association	No.members	Presence in Catalonia/Province of Tarragona
Great Wine Capitals (Intl.)	9	NO/NO
RECEVIN (Europe)	9 countries, 78 municipalities	YES/NO
Assembly of European Wine-Producing Regions (Europe)	17 countries	by countries
ACEVIN (Spain)	84 members (public entities)	YES/NO

Various sources.

encourages new ideas, highlighting the need to promote the culture of wine in all parts of the travel life cycle (before, during and afterwards) and in all aspects of the value chain. It also highlights *authenticity*, an important complementary resource for the wine tourism experience and one of the key values of wineries, which often are oriented towards producing artisan wines for a demanding and personalised market as opposed to the mass production model.

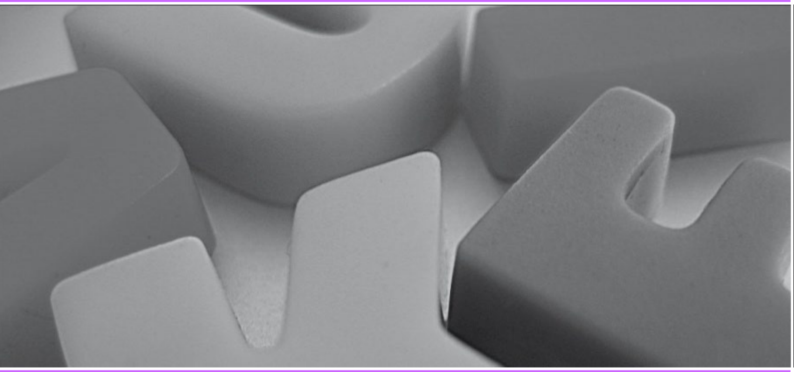
In order to become a member of the European Wine Route wineries a body must first adhere to the charter and comply with its requirements. Wineries can also become part of the Route of Excellence if they meet additional requirements.

Requirements

Specific requirements have been established for the public (the region) and private sectors in accordance with what is offered to traditional tourist and wine tourists, in other words, accommodations, dining, shopping, tourist offices, travel agencies, tour operators, wineries, museums, wine interpretive centres, wine shops, and tasting services and courses. Each destination must form an administrative body to oversee the process of verifying adherence, which must draft a three-year strategic plan of action.
Other conditions, apart from the logical criteria (being within the DO, promoting itself, and having an administrative body, a brand and a logo, and proper signposting), require the destination to have at least six wineries that can be visited, for a minimum of 12 hours per week two days per week, with 5 complementary services (two of which must be a restaurant and accommodation) and the destination must promote a balanced and reasonable pricing policy.
The wine tourism products offered, although there are general requirements, are determined separately for each subsector. For example, knowing a foreign language is considered important for people who work in travel agencies and tourist offices, as is a good understanding of the local wines for restaurant employees. Wine shops and wineries must have areas specifically for wine tasting with appropriate glassware, a shop area, and guided tours by appointment, and must meet other requirements.
For excellence certification, additional requirements must be met with the specific purpose of improving administration (greater dedication and decision-making capacity), increasing services and products offered at the destination (6 wineries instead of 10; 5 complementary services, instead of 8), creating and implementing control systems (creation of wine tourism sustainability indicators), and developing tools to analyze the profile of demand. In order to achieve this last objective, the administrative body will create a system to collect information and generate a wine tourist profile which can be distributed throughout the sector and then analyzed. Members of the business community must also undertake to provide data in order to achieve excellence.
Tarragona wine tourism destinations have a very weak presence in the principal wine tourism associations, with membership limited to Catalan associations (TABLE 2). In contrast, La Rioja is one of 9 tourist destinations in the international wine tourism association, while others such as Cambados, Utiel, and Montilla are members of the Spanish association ACEVIN.

These documents, regardless of whether or not they complied with a view to joining the charter, may be useful to the sector, helping to define the wine tourism model and quality system for our region.

NEWS AND PUBLICATIONS



Tarragona Restaurant Wine

From 3 to 18 November, twenty-three restaurants in the city and other nearby municipalities offered special meals accompanied by wines from the 6 DOs at a special price. After the success of the first event, the Tarragona Chamber of Commerce, sponsor of the initiative, has announced the event will be held for a second year.

For further information please contact Tarragona Restaurant Wine.

Dancing wine cellars

With the aim of promoting cultural awareness of the Province of Tarragona and artistic projects in the province, the Regional Cultural Services Department of the Government of Catalonia proposed this audiovisual project under which dance pieces were recorded on video in six modernist wine cellars in the region.

Further information on the project.

163,62 euros average expenditure per day

This is the average amount spent per day by Spanish wine and culinary tourists according to the most recent study on the matter by Dinamiza Asesores. The report, based on online surveys of more than 7,000 users in early 2010, reveals some of the characteristics of this segment, such as average stay and preferred accommodation. Expenditure was higher when compared to previous studies, even considering that each study applies a different method (see Statistics and Markets section).

Full report in Analysis of Wine and Culinary Tourism Demand in Spain (Análisis de la Demanda del Turismo Enogastronómico en España).

TALK OF THE TOWN

The following are the results of the conference entitled "Success of Californian wine tourism due to the cooperation of companies and institutions" *(L'èxit de l'enoturisme a Califòrnia a través de la cooperació dels agents*) held in Vilafranca del Penedès in November:

- ✓ Management of destinations must be comprehensive, taking all involved parties in the wine and tourism industries into account, so that tourists do not find discrepancies between wine and regular tourism in the region.
- ✓ Real cooperation between parties who are in the same destination is needed, setting aside idiosyncrasies and political aspects.
- ✓ Tourists want to experience the destination. Concepts such as emotion, feeling and learning were the most mentioned by the speakers.
- ✓ Tourist operators need to adapt to the trend of more demanding clients and meet demand for an increasingly wide range of options. Family, meeting, and incentive tourism segments should be considered.
- ✓ Quality must be ensured in all areas (accommodation, dining, complementary services and products, transport systems, tourist information, etc.).
- ✓ In addition to quality service, training and professionalism are two other related aspects to be considered.
- ✓ Resources must be transformed into products. Europe's rich history and all this entails (its traditions, the cultural heritage of different periods, etc.) differentiate wine tourism in the "Old World" from other regions. However, other less culturally rich destinations such as the US, Australia, New Zealand and South Africa have been able to maximize their resources to create highly competitive wine tourism products.
- ✓ Marketing is one of the sector's main problems. Destinations should take full advantage of existing marketing channels in the wine sector, using the product (the bottle) as an ambassador of the territory where it was made.