A Review of the Development of Wine Tourism in Chile

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ABSTRACT

The purpose of the paper is to offer an analysis of the causes hindering the development of wine tourism as a direct wine marketing channel in Chile. The paper consists of the application of well-established frameworks existing in wine tourism literature to identify issues existing in Chilean wine tourism and proposes policies to improve its development. Chilean wine industry has been developing its infrastructure in wine tourism for many years but behavioural factors like promotion of country image and wine route awareness as a destination for international tourists and local consumers' behaviour, which are mostly driven by price rather than wine region, hinder the development of wine tourists.

KEYWORDS: Chile, Wine Tourism, Wine Routes.

Introduction

Wine tourism has been defined as 'visitation to vineyards, wineries, wine festivals and wine shows for which grape wine tasting and/or experiencing the attributes of a grape wine region are the prime motivating factors for visitors' (Hall *et al.,* 2000). Research in wine tourism in Australia, New Zealand, United States and South Africa has flourished (Carlsen, 2004) and became most of the research published in wine tourism (Mitchell and Hall, 2006) for a number of reasons among them the high development of wine tourism in these countries. Chilean small and medium wineries face an opposite situation. The tourism industry in Chile is not as developed as in the northern hemisphere or Australia, New Zealand and South Africa. Chile has received 2.02 million tourists in 2005 (UNWTO, 2006). Only 237,000 visitors have visited all Chilean wineries in 2005 compared with more than half a million in Australia. Sixty seven per cent of the wine visitors to Chilean wineries were foreign tourists (Chilevid, 2006) compared with an average of 20% in Australia and New Zealand, and spent approximately US$ 8 million (own estimates) compared with A$ 120 millions in wine Australia in 2004 but almost A$ 2.4 billions including other actors like hotels, transport and food (Tourism Australia, 2005). All figures clearly show an opposite situation between Chile and highly developed wine tourism countries

Five years have passed since Sharples (2002) reviewed a number of initiatives in Chilean wine tourism, but Chilean wine tourism is still in its infancy. This paper aims to analyze the situation of Chilean wine tourism using multiple frameworks existing in wine tourism literature in order to understand the reasons for this low level of development of this direct marketing channel and suggests actions to develop Chilean wine tourism

A Review o f Global Wine Tourism

Wine tourism is usually defined to the visitation to vineyards and experiencing the attributes of a wine region (Getz, 2000). Carlsen (2004) suggests that wine tourism comprises cellar door tasting, vineyard tours, wine routes, and wine festivals. In Australia, New Zealand and United States, the various forms of wine tourism are means to increase the amount of sales in the short term, educate the consumer, and create brand and product loyalty in the long term (Hall and Mitchell, 2000; O'Neill and Palmer, 2004). Wine tourism is also well established in certain parts of Europe like France, e.g. Beaujolais, Bordeaux, Burgundy (O'Neill and Palmer, 2004). However, the level of development in wine tourism is not uniform (Mitchell and Hall, 2006) There are differences between highly developed and less developed regions or countries, e.g. some Mediterranean countries (Hall and Mitchell, 2000). Researchers found that many problems affect the development of wine tourism like consumer behaviour, lack of infrastructure, regulatory restrictions, promotion of wine routes without investment in facilities or cellar door staff training, strong focus of wine makers in production and product, lack of intersectoral linkages and inter organizational coordination within the industry (Hall and Mitchell, 2000; Carlsen, 2004; Jaffe and Pasternak, 2004; Correia et al, 2004).

This paper proposes a review of the wine tourism development in Chile. The information presented in this paper comes from a Chilean wine industry directory (Directorio de la Industria Vitivinícola Chilena, 2006), surveys and visits to wineries and industry reports on activities related to wine tourism in Chile. The paper employs the motivational framework for wine tourism suggested in Alant and Bruwer (2004), Carlsen (2004), Mitchell and Hall (2006), and Getz (2000).

On the one hand, Getz (2000) defined the contents of wine destination development from a supply side: attractions, services, infrastructure and organizational development. Specific wine tourism produces are wine-themed visitors centres, wine villages, wine routes, and wine country tours. In an excellent review of the estate of play in wine tourism research, Mitchell and Hall (2006) defines the wine tourism as "a combination of the attributes of the wine tourist and the wine tourism product and highlight the fact that the wine tourism product is a confluence between the tourism and wine industries, within the wider context of the wine region and the winescape. As such, the product is not only derived from the winery, its staff, and setting, but it is intertwined with the wider regional tourism product. This is a useful way of conceptualizing the wine tourism product as it provides context for discussion of the core product of wine tourism, which is undoubtedly the winery and vineyard itself" (pp. 312). This is the first aspect of the review about the wine tourism development in Chile, which complements and updates the previous review performed by Sharples (2002).

On the other hand, the demand side: the wine visitor has been studied in different situations and from different approaches such as: demographic profile, tripographic behaviour, and winery visit performance (Mitchell and Hall, 2006). For example, Charters and Ali-Knight (2002) studied motivating factors and goals, based on visitors' wine knowledge and about their interest in wine. Alonso *et al* (2007) found spending differences between domestic and overseas winery visitors in several areas: commercial opportunities due to higher incomes and their relatively younger age.
These visitors may continue developing their wine knowledge as well as increasing their involvement with wine in the years to come (Alonso et al, 2007). However, a key factor given the low level of development in wine tourism is to study the motivations for visiting wineries, which are important in understanding the lack of the winery visitor. For example, internal motives include various aspects of learning about wine (e.g., storing and aging and winemaking) and seemed to be more appealing to "Wine Lovers," but external motives such as tours of the winery or vineyard were more appealing to "Wine Novices" (Charters and Ali-Knight, 2002). Given the exploratory and broad overview of the wine tourism development in Chile taken in this study, the motivational aspect and the differences between local and foreign tourists are the main issues about wine tourism demand presented in this review .

Chile Wine Tourism: A review of wine tourism infrastructure development

Wine tourism is a significant factor in regional development because it helps not only to create local jobs and promote local merchandise but also to attract investment and other types of tourism at regional level (Mitchell and Hall, 2006). Chile has thirteen clearly identified wine regions located in a range of 1000 km (see plate 1), from north to south: Elqui Valley, Limari Valley, Aconcagua Valley, Casablanca Valley, San Antonio Valley, Maipo Valley, Cachapoal Valley, Colchagua Valley, Curico Valley, Maule Valley and the south region comprising Itata Valley, Bio Bio Valley and Malleco Valley (Wines of Chile, 2007; Knowles and Sharples, 2002). However, the majority of Chile's premium wines are made in the wine regions of Maule, Maipo, Aconcagua, Cachapoal and Colchagua, which are attractive destinations for the tourist market because of their closeness to Santiago, Chile's capital city, and rich cultural aspects (Sharples, 2002). Six of the thirteen wine regions have established a wine route: Aconcagua Valley, Casablanca Valley, Cachapoal Valley, Colchagua Valley, Maule Valley and Curico Valley (Sernatur, 2006). Maipo Valley is the most visited wine region with 116,000 visits in 2005 – 49% of all visits, followed by Casablanca Valley with 21% and Colchagua with 14% (Chilevid, 2006).

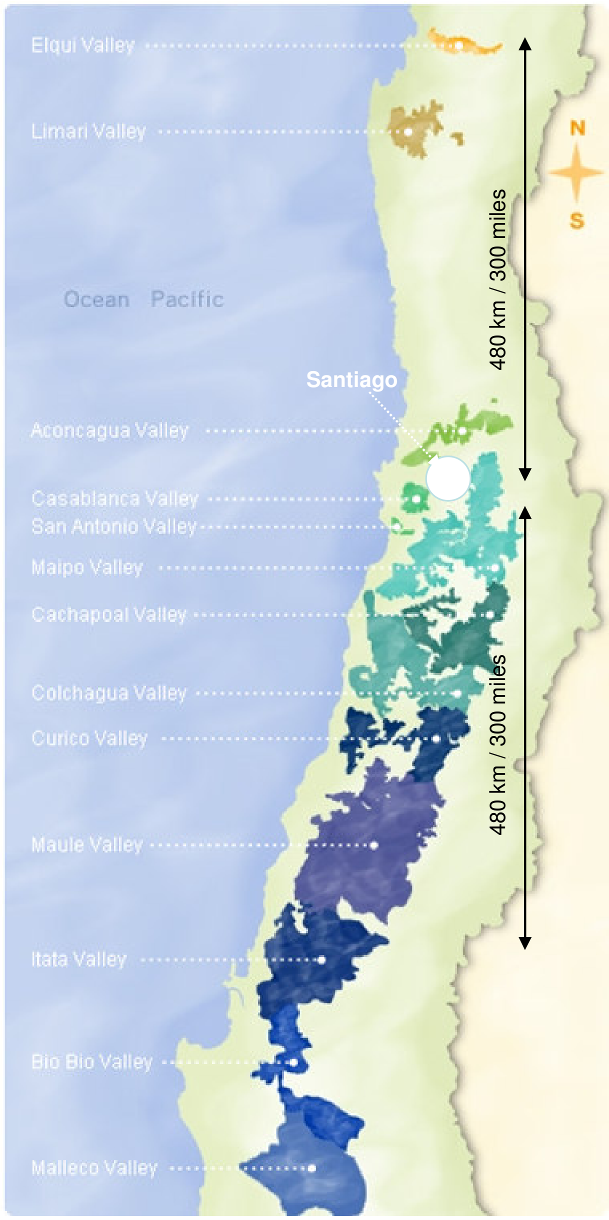

Plate 1. Wine Regions in Chile (source: http://www.winesofchile.org/wine-regions)

Wine routes

Aconcagua Valley wine route (no website) is comprised by four traditional wineries with cellars dating from the Spanish colonial times in 1800 (Sernatur, 2006). Casablanca Valley wine route is comprised by ten wineries specialized in white wines (www.casablancavalley.cl). This valley was discovered only recently and became an icon in Chilean wine industry because of its internationally recognized white wines. Cachapoal Valley has established a central facility to receive wine tourists. This wine route is located 110 km south of Santiago and it offers guided tours in English and French, which finish with a lunch in one of the wineries (www.cachapoalwineroute.cl). There are nine wineries in this route, which follow French traditions in winemaking, as well as traditional 'haciendas' (old colonial ranch) (www.cachapoalwineroute.cl). Colchagua Valley (www.rutadelvino.cl) is located near Santa Cruz, a city located 180 km south of Santiago. This wine route has a centralized office where tours are organized to the six wineries from the eighteen wineries associated to the route, and it has a hotel, two museums and a steam train circuit (www.rutadelvinocurico.cl). Colchagua Valley's strengths are in its Chilean cultural traditions as well as the entrepreneurial spirit of founders of the wine route (Sernatur, 2006). Maule Valley wine route (www.valledelmaule.cl) starts in Talca, a city located 250 km south of Santiago, and ends in Constitucion, a city in the Maule region next to the Pacific Ocean. The wine route has a central facility where tours depart to visit some of the fifteen wineries comprising the route (www.valledelmaule.cl). The wine route is divided into three options: Maule river valley, the Andes and the coast of the Pacific Ocean. Curico Valley wine route also has a coordination office in Curico, a city located 190 km south of Santiago (www.rutadelvinocurico.cl). The wine route comprises 16 wineries (www.rutadelvinocurico.cl).

A completely different picture is Maipo Valley (no website). Maipo Valley is the oldest wine region in Chile and one of the areas where wine tourism is highly developed even though there is not an established wine route. The closeness to Santiago downtown and, in some cases, easiness of transportation – some underground lines can leave the tourist only 5 minutes away from a winery – imply that most of the tourist visitors prefer going to one of the wineries in this region. Maipo Valley is the region where internationally recognized wineries are located, e.g. Concha y Toro, and there are twelve independent wineries not forming a proper wine route (Sernatur, 2006). Concha y Toro's international reputation attracts approximately 500 tourists daily in a tour costing 12 US$. The tour shows the old mansion of the owner Mr. Concha y Toro, his famous "Casillero del Diablo" (Cellar of the Devil) story that supports the marketing effort of the firm to position this brand as a global brand with 1 million cases per year, and it includes tasting two red wines. The winery has a state-of-the-art wine shop and wine bar.

In terms of wine route development, Chilean wine regions appeared to have built an important infrastructure. However, there are some issues to solve that may be affecting wine routes. A workshop run by Chilean Production Development Corporation (CORFO) on wine routes in 2005 found that 48% of the participants (mostly owners of wineries) believed that commitment is a key success factor for the development of the wine route but they agreed that there were not strategic plans for the existing wine routes. Moreover, they considered that not all the wineries could become part of a wine route because they were not attractive enough to tourists or lack infrastructure (restaurants, tasting rooms or guesthouses). While most of the wine routes' objective is to help positioning the wine region in the mind of the consumers, few wineries see the wine route as a truly direct marketing channel but an additional business in the tourist sector. Table 1 provides with a summary of the wine routes and their associated wineries assisting to the workshop that were operative at this moment.

Wine Route	Foundation	Wineries Associated	Number of wineries	Estimated number of visitors	Strengths
Limari Valley	2004	Viña Casa Tamaya, Viña Tabali, Viña Francisco de Aguirre, Hacienda Santa Cristina, Ovatruz	5	4,700	Emerging valley, next to a highly popular summer resort, 360 days of sun
Casablanca Valley	2000	Viña Matetic, Viña Catrala, Kingston Family Vineyards, Viña Casas del Bosque, Viña Casablanca, Viña Morandé, William Cole Vineyards, Quintay, Viña Ventisquero, Viña Mar de Casablanca, Villard Fines Wines, Viñedos Orgánicos Emiliana – V.O.E, Viña Veramonte, Viña Ventisquero, Viña Santa Rita, Viña Carmen, Viña Indomita	18	48,000	Closeness to Valparaiso (famous port for cruise ships) and Santiago, new valley, high level of investments in cellars, restaurants
Colchagua Valley	1997	Bisquertt, Casa Silva, Casa Lapostolle, Cono Sur, Estampa, Jacques & Francois Lurton, Laura Hartwig, Los Vascos, Luis Felipe Edwards, Montes, MontGras, Siegel, VOE and Viu Manent.	14	32,000	Hotel, Museums, Steam train, World-renowed wineries (e.g. Viña Montes)
Cachapoal Valley	2003	Altaïr, Anakena, Casa Lapostolle, Casas del Toqui, Chateau Los Boldos, Gracia, Misiones de Rengo, Morandé, Porta, San Isidro, Torreón de Paredes and Hacienda Los Lingues	13	4,700	There are complementary programs with golf, hot springs, restaurants, etc.
Curico Valley	2003	AltaCima, Viña Aresti, Viña Astaburuaga, Viña Correa Albano,Viña Echeverria,Viña Ines Escobar, Viña La Fortuna, Viña Las Pitras, Viña Los Robles, Viña Mario Edwards, Miguel Torres, Millaman, Viña Pirazzoli, Viña San Pedro, Viña San Rafael, Viña Santa Hortensia, Valdivieso	17	4,700	There are complementary attractions: natural reserves, lakes, fishing village
Itata Valley	2003	Viñedos Tierras de Arrau, Viña Casas de Giner, Viña Tierra y Fuego, Viña Valle del Itata, Vinos del Larqui, Viña Männle, Viña Casanueva	5	4,700	Closeness to a famous skiing and hot springs resort
Maipo Alto	2005	Viña El Principal, Viña Aquitania, Viña Pérez Cruz, Viña Quebrada de Macul, Viña Huelquén, Viña Hacienda Chada, Viña Portal del Alto, Viña Haras de Pirque	8		Not fully implemented yet but its closeness to Maipo Valley may help them to receive the tourists looking for small wineries instead of the large wineries like Concha y Toro

Source: Workshop on Wine Routes (CORFO, 2005) and First Analysis of Wine Tourism in Chile (Chilevid, 2006)

Table I. Summary of Wine Routes Development in Chile

Wine festivals

Wine and food festivals are components of the wine tourism product around the world and can be important catalysts for future wine tourism and wine consumer behaviour (Mitchell and Hall, 2006). There are two wine festivals in Chile. One is an old event, a key event in Colchagua's wine tourism industry, the Colchagua Harvest Festival, started in 1998, and now the largest wine festival in Chile (Woods, 2002). The festival brings every year more than 40,000 tourists to Santa Cruz, the city at the centre of Colchagua Valley (Woods, 2002). In the last version, 18 wineries participated during the festival, most of them well-known locally and internationally. The festival lasts three days and there were different activities such as traditional dances, antique carriages, regional foods and crafts, and the selection of a Harvest Queen (www.rutadelvino.cl). The other festival started in 2007 and is organized by Cachapoal Valley. It is a jazz and wine international festival. It lasted two days and two wineries of the wine route hosted different jazz bands including food and wine tasting (www.cachapoalwineroute.cl).

Wineries' cellar door activities development and strategic positioning

Wine production and tourism are located at opposite ends of the industrial spectrum and the characteristics of each activity are essentially different in microeconomic sense (Carslen, 2004; pp. 8). Wine production economics is supply-led, price taking, production of a homogeneous product, so the managers focus is on cost-minimizing activities and reliant on capital growth to create wealth (Carslen, 2004). On the other hand, tourism is a service industry – essentially demand-driven, price-making and heterogeneous service – that relies on profits to create wealth (Carslen, 2004) and looks to emphasize an experiential approach to wine (Hall and Mitchell, 2007). In that sense, experience-driven wineries want to develop and maintain relationships directly with their customers to develop their loyalty (Hall and Mitchell, 2007). For these companies, cellar door activities are effective tools to build brand loyalty, to allow consumers to try actual or new products with reduced level of risk and to obtain marketing intelligence at low cost (Dodd, 1995)

Wine tourism in Chile has begun recently with important investments in facilities oriented to visitors, growing awareness of gastronomy to accompany these facilities and organization into wine routes. When the level of development of Chilean wineries' cellar door activities is compared with other more developed regions in wine tourism like Niagara (Getz and Brown, 2006), the differences seem to very important as table II shows. When Chile is compared with other less developed region like Okanagan in British Columbia, Canada (Getz and Brown, 2006), Chilean wineries appear to be better off.

Winery attribute	Niagara (n=38)	Okanagan (n=44)	Chile total (n=301)	Colchagua (n=34)
Open all year (%)	89	48	27	53
Tours available (%)	89	50	66	91
Meals available (%)	29	18	15	N/A
Accomodation on site (%)	11	2	11	N/A
Websites operational (%)	100	41	60	62

Sources: Getz and Brown (2006) for Niagara and Okanagan information, Chilevid (2006) and author''s research

Table II. Development of Cellar Door Activities in Chile compared with Niagara (Canada) and Okanagan (Canada) wine regions

While there are very good facilities, like state-of-the-art cellars, that may be feasible to convert, or are already converted, to wine tourism in many wineries (Echecopar et al, 2004), Chilean small to medium wineries have a strong emphasis on production factors such as constant quality driven by improved viticulture practices and competitive prices (Kunc, 2007). In other words, small to medium Chilean wineries have an orientation and focus towards product, where the producer or certain standards define the quality of wine, rather than the market (Hall and Mitchell, 2007). Wineries oriented towards product may invest in cellar door tasting rooms or other facilities to attract tourists but their managers do not believe that cellar door actions can increase sales or build loyalty more than investing in promoting wine through the distribution channels (Ali-Knight and Charters, 1999).

Wineries' cellar door activities efficiency

Another important aspect at firm level is the efficiency of cellar door operations in those firms that are already operating cellar door activities. In order to promote return visits, it is essential that management engage in relationship marketing after a visit (Jaffe and Pasternak, 2004). It is important that the cellar door manager never lets a visitor leave without attempting to establish a relationship (Jaffe and Pasternak, 2004). Every winery should build a database with contact information of every visitor or potential visitor, especially those that purchased wine in a previous visit or express a desired to visit the winery, but very few wineries do it (Jaffe and Pasternak, 2004; Correia et al, 2004, Getz and Brown, 2006; Thach et al, 2007). As part of this research, the author visited six wineries located in Casablanca, Maipo, Alto Maipo, Cachapoal and Colchagua Valleys and no one asked for his contact details to promote return visits or long-term relationships for wine sales, even at a very large firm that had enough resources for doing so. The author also sent emails to another six wineries located in the same places to book a visit for a specific date, but they were fully booked. None of them ask in their replies for contact details for future visits or sales promotions.

To summarize, every cellar door activity and contact with a visitor should be an opportunity to establish a strong link with an actual or potential consumer. Unfortunately, marketing activities are believed to be stronger to achieve sales and loyalty in the market.

Chile Wine Tourism: A review of tourist level aspects

Foreign Wine Tourist in Chile

Most of wine tourists in Chile are foreigners (67% percent of total tourist) according to the latest study in wine tourism (Chilevid, 2006), which is the opposite picture with respect to countries like Australia where approximately 25% of wine tourists are international (Tourism Australia, 2005) or New Zealand with 20% on average (Mitchell and Hall, 2006). While 175,000 international tourists may look a good number, it only represents less than 9 % of the total international tourists visiting Chile, where in Australia the number was 579,000 international visitors, which is more than 10% of total international visitors (Tourism Australia, 2005).

The actual motivations of foreign visitors are generated because a visit to a winery is part of any traditional package offered to any visitor to Chile. However, survey to international tourists in Chile's main airport found that 80% of tourists do not know anything about the wine routes existing in Chile. This result is surprising even though half of them were returning visitors to Chile on holidays and most of them (62%) know about wine making (DuocUC, 2003). From a lifestyle typology, wine lover represent only the 2% of wine tourists in Chile, wine interested tourists are only 23% and 75% of wine tourists can be categorized as curious tourists (Chilevid, 2006). Thus, it is not surprising that foreign wine tourists visit a winery as part of a holiday, usually taking one-day tours and visiting two or three wineries near Santiago (more than 50% of the wine tourists go to Valle del Maipo region). This results reinforces the concept that most of the wine tourists are 'curious tourists' since they tend to visit wineries in organized tours (Charters and Ali-Knight, 2002). Thus, it is important the role of other actors, like tour companies, to bring those curious tourists to a winery.

The role of tour companies in bringing tourists to wineries is not without problems for wineries. In a recent meeting, managers from different wineries argued that tour operators are not interested in long-term alliances with wineries (Vendimia & CCV, 2007). Among a sample of tour operators, they usually program tours to the following wine regions (in terms of preference): Colchagua Valley (100%), Casablanca Valley (75%), Maule Valley (60%), Maipo Valley (42%) and Cachapoal Valley (17%) (DuocUC, 2003). Tour operators charge between USD 120 and USD 150 per person per day for visiting a group of wineries including lunch and a cultural visit, e.g. a wine museum.

Local Wine Tourist

The local consumption per capita in 2001 was 16 litres, far below from the 36 litres consumed in 1987. In Chile, similarly to the old world of wine, wine was part of everyday life for millions of people who grew up drinking wine at every meal but younger generations replaced it for beer or non-alcoholic beverages. This trend is similar to other traditional wine producing and consuming countries (Hall and Mitchell, 2007). However, the renewal occurred in the Chilean industry and an increase in local purchasing power started attracting a new generation of consumers increasing local consumption to 18 litres per capita. While the consumption is equally divided among wine, beer and spirits, wine has become a symbol of status associated with special occasions in Chile. However, only 33% of the wine tourists are local tourists, a very low percentage when is compared with other developed countries. While most of local wine tourists come from Santiago, Chile's capital, a recent study in Santiago found that 75% of the people knew about wine routes but only 29% had visited at least once. Half of the visitors to a wine route visited Casablanca Valley and 32% visited Colchagua Valley.

There are many factors that may account for this low percentage. While scenery is a key motivator to visit a winery either for visitors and non-visitors (Jaffe and Pasternak, 2004; Correia et al, 2004), there are many spectacular natural resources like the Andes mountains and skiing and coastal resorts that compete against the attraction of a wine region. Another important aspect is how important is wine region for wine consumers. Winery and wine region only account for 4% of the attributes deciding the purchase of a wine in Chile compared with price (31%) and brand (25%) (Zamora and Barril, 2007). The importance of price and brand can also be attributed to the role played by liquor stores which buy directly from wineries. The behaviour of these stores focuses the consumer towards price and brand rather than the region where the wine comes. Therefore, there are not incentives for the consumers to travel to the wine regions and enjoy 'consumer experience tourism' (Mitchell and Hall, 2004).

Conclusions

Although only preliminary, the findings seem to suggest a number of interesting issues. For example, vineyards are increasingly giving up a pure transactional market approach and, instead, supplement transaction marketing with more relational marketing activities in a very much similar way as occurred in New Zealand (Lindgreen, 2001). While initially the focus of the Chilean wineries was product quality and market development through distributors (Kunc, 2007), there is an increasing awareness of the need to connect directly with the customers. The Chilean wineries are doing strong efforts supported by the government to establish more direct marketing channels like wine routes, tasting rooms and restaurants. However, the environment is still difficult for developing wine tourism because there is not a local culture valuing wine regions in their purchasing behavior and international promotion activities do not promote wine regions or even the country. Thus, the payoffs for establishing more direct marketing channels will not be received immediately and may affect the sustainability of the actual efforts.

In the case that the visit to the winery is only part of an overall holiday in, or near to, a wine region, it is important to understand the context of the visit to the winery so as to really assess the existence of a wine tourist market (Carslen, 2004). There has been a shift in wine country imagery from an emphasis on wine production processes and related facilities to more of a focus on aesthetic and experiential values associated with more leisurely recreational and tourist pursuits (Williams, 2001). Chile should focus on combining wine with its natural beauties to conform a solid image as international tourism destination.

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