

Wine tourism and enhanced value: a comparison between Italian successful destinations¹

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Abstract

In the last few years the models of tourist consumerism have become increasingly complex to interpret, mainly because there is an increasing variety of reasons which motivate tourism. It is universally acknowledged that tourism requires a new interpretative method, in which it is not *tourism* which is analysed, but *tourisms*. This is due to the existence of models and forms of customer behaviour which are significantly differentiated in terms of how the destination is chosen and in how the tourist experience is enjoyed (Buhalis, 2000).

In this context, *wine tourism* is one of the most dynamic and significant *new forms of tourism*. Important growth is taking place in this sector and the direct consequence is that different areas are increasingly interested in constructing offer systems to meet the demand.

On this basis, the *starting point* of the present research is an investigation into the *systems and management structures which wine-growing areas can use to build successful offer systems for wine tourism*.

With this aim, we assumed that the typical material logics of destination management (Franch, 2002) could represent a theoretical and operational reference model for defining policies to improve wine tourism resources in a certain area. *The direction of this study expects that specific and targeted destination management policies can be an essential pre-requisite for the transformation of wine-growing areas into successful wine tourism destinations*. This means recognition that the quality of the wine produced and the competitive potential of the producers (Barney J., 1991) can - within certain limits - be considered as being necessary, but are by no means sufficient to ensure that a wine-growing area will have a successful competitive position in wine tourism.

Moving on from these assumptions and deductions, this study has attempted to validate the theoretical assumption by empirical testing carried out at two distinct - but linked - levels of analysis. First of all we identified the most successful wine-tourism destinations in Italy, also according to the theoretical assumptions on which Country of Origin Effect studies are based (Bilkey W.J., 1982). Analysis was carried out by constructing a special set of indicators and by observing certain elements present in the different destinations we studied. Some excellent wine

tourism destinations have emerged from our analysis and can be considered as the reference benchmark for the second line of research followed in this work. We carried out a critical

¹ Although the present work is the joint work of the authors, parts 1 and 2 are by Amedeo Maizza, and parts 3,4 and 5 by Pierfelice Rosato, while the conclusion is the result of joint collaboration.

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analysis of the excellent wine tourism destinations identified by the benchmarking method, and then used an inductive approach to draw conclusions about the main determining management practices which function to create value in this specific sector of tourism.

Although this needs further investigation, our present research has made it possible to identify some clear and evident economic and managerial “best practices”, common to all the excellent destinations we identified. The common denominator underlying the different processes of territorial valorisation in the wine tourism sector lies in the search (by means of destination management policies inspired by a system) for management processes (Wernefelt B., 1984) which can feed into the positive “famous wine – famous destination” cycle.

This result was predictable from the outset, but is still interesting if read as a stimulus for wine-growing areas which have thus far demonstrated only a limited aptitude for using destination management processes to enhance their potential in the specific sector of wine tourism.

1. Wine tourism and the wine tourist: implications for management

Wine reminds the consumer of its area of origin more than any other agricultural food product (Bilkley W.J. – Nes. E. 1982) and is therefore active in the positive cycle which enhances an area through distribution and promotion of its products, respect for the environment and the pursuit of wholesomeness and quality *latu sensu* (Mastroberardino P. 2002).

With this in view, we can well see how the ample and variegated range of “territories” may represent an opportunity, and at the same time a constraint, for the development and diversification of a country’s wine offer. On the one hand it can be considered that the pursuit of distinctive characteristics and thus differences emphasises the potential present in different vines and wines. On the other hand this very aspect has negative effects on the ability to communicate, distribute and understand these distinctive features. It is well known that the communication strategies for niche products (Mattiacci A. 2000) are still paying the price of a legacy of chronic inefficiency, due above all to a shortage of available funds. So a wide-ranging territorial policy may ease the implementation of the circuit of value, guaranteeing the achievement of a suitable critical mass to obtain synergies set up by the different territorial sectors. In order for this to occur, it is obviously necessary to have a management able to harmonise the different tendencies and specific sectors which characterise an area (Golinelli C. 2002).

Wine tourism is an opportunity in this context, as an element in the diversification of the offer and also because it makes it possible to launch common actions set up by the different operators, along with others active in the territory and its management. It is a matter of successful unified communication of the diversity present in a certain geographical area, not only by means of suitable advertising campaigns, but also (or above all) by means of actions with a single common denominator (for example the offer not only of wine as a simple product, but of all the elements connected with its area of origin; history, tradition, art, culture, cuisine, landscape) able to offer guarantees to the customer thanks to a general activity of protection and monitoring (Antonioli Corigliano, 1996).

Wine tourism in our country is a relatively recent development dating back to the 1990’s in its most structured articulation (for example the law establishing “wine roads” is no. 28 – 27/07/1999). This delay – which naturally has effects on the development of wine tourism itself – is in evident contrast with our wine-making traditions, especially if we see how other European countries have already developed a consolidated offer which undoubtedly contributes to the enhanced value of the wineproducers and to tourism in general.

However, Italy is able to generate a flow of about 4.5 million wine tourists, with a turnover of about 2 thousand million euros: figures which could double in the next 5 years (Censis 2007). At the moment this is mainly concentrated in central and northern Italy, revolving around the 15 districts (mostly in the North) which are the most efficient at attracting wine tourists. However, we can predict that there could be at least 50 other destinations (intended as territorial areas) in the near future, representing different distinctive Italian features and specialities. It must also be pointed out that all information about the data on wine tourism is incomplete, due to:

- the lack of an identification of the wine tourist
- the incompleteness of the sources providing the data.

Using the Censis data on wine tourism for 2006, we can draw up a profile of the wine tourist: he has a reasonable knowledge of the product, an average age of about 40, an average-high income, and usually travels as a couple or with friends. The wine tourist's interest in wine makes him want to see the place of production (especially for "great" wines), and then he is attracted by the landscape, the local culture, the cuisine, and not least by the artistic heritage.

One aspect of relevant interest, but at the same time a potential problem for its implications on the offer, is the composition of the average daily expenditure of 167 euros (an increase of 12% compared with 2003), of which 50 for overnight accommodation, about another 50 for food, 32 for wine and the rest shared between purchases of local crafts and services. It is interesting to notice how this does not necessarily have positive effects, since this must be considered as average expenditure, much higher than that of the "ordinary" tourist, and implies an adequate offer system able to ensure an average-high level of services. This aspect could appear – as we were saying – a problem for the offer if, as is seen in some cases, this derives from "improvised" or poorly structured formulas which evidently undermine the potential present in the area of operation. Wine tourism is closely correlated to the tourist attractions of the area, as much as other types of tourism, and so it is important not to neglect this element. For this reason it can be seen that in the case of poorly articulated initiatives which do not take account of the demand can damage not only these same initiatives, but also to a certain extent the whole territorial catchment area. This seems to be a strong affirmation, but is motivated by analysis of another interesting piece of data which emerged from the Censis report we mentioned above, according to which the primary source of information for wine tourists is word of mouth. This is as important a factor in choosing the destination as

knowledge of the product and specialist guidebooks. This brings out another interesting factor with relevant implications for the offer; it was easy to predict this, the importance of the combination product/territory and level of tourist satisfaction.

The companies which cater to tourists must therefore aim at high standards of service in order to avoid the negative effects of viral marketing (Aaker D.A. – Joachimsthaler E. 2000) which plays an even more strategic and uncontrollable role in the field of business communication in the age of internet (consider the importance of forums, blogs, chat rooms etc.).

2. The consumer behaviour: the case of wine tourism.

In the last few years, the sector which studies the competitiveness of tourist operators has observed the increasing importance of the theme of strategic management, through joint action undertaken by the different elements which have an increasing influence on the nature of tourism.

A first aspect has to do with the complexity of consumption models, which show the increasing importance of tourism use models based on a significant demand for product *personalisation*.

The customer-tourist wants to contribute, as a “prosumer”⁴ (Normann R. 1995) to the process of composition and distribution of the tourism experience. So there is an evident “explosion” of tourism experience in a wide diversity of forms and contents where there is a pursuit of “authentic” forms of tourism experience, and where the qualifying and distinctive elements are represented by relationships with the territory, culture, traditions and lifestyles. This causes the emergence of different kinds of “niche tourism” which have a link to the territory and seem able to enhance the specific authentic resources which an area is able to offer as destinations – where these are suitably recognised and valued. This development of consumer behaviour together with increasing interest in the wine sector means that wine tourism is a very important part of the overall offer of a destination.

These developments in the models of tourism consumerism create significant consequences for the offer system. Tourism products seem increasingly to take on the appearance of emotional experience goods. This developmental tendency contributes to the growth of wine tourism, an important component of which is the emotional experience. When the wine tourist chooses a destination, he favours the combination “area/wine”, meaning the joint presence of traditional attractions – which we will talk about shortly – and wine producers which can guarantee a suitable level of service.

This means recognising the need to define a system of destination offer which can meet the demand increasingly directed towards varied authentic experiences necessarily including quality – this can be done by offering specific high quality proposals.

It therefore becomes necessary to create an offer based on the integration of different consumer experiences by means of more or less codified mechanisms of co-ordination between the different kinds of resources and services (Rispoli, 2001). The need appears evident, then, to move from the concept of *tourist product* to the concept of *tourist destination* wherever “destinations are amalgams of tourist products, offering an integrated experience to consumers” (Buhalis D. 2000). The value assigned to the tourist experience, the real subject of the demand, is created through a complex relational system between tourist and the elements making up the specific destination. The destination takes on the appearance of a “system of overall offer in which many products and forms of aggregation can co-exist and intermingle, and in which the economic and decisional interdependence of the many operators involved create diverse situations of co-ordination and integration” (Tamma M., 2002). With this in view, the wine tourism offer of an area becomes a component of a wider systemic composition which uses suitable strategies to meet with the diversity of tourist consumers and direct them towards different kinds of offer.

This is decisive for valorising the tourism resources in an area and causes two distinct - but complementary - levels of tourism competition. The first of these is the competition between alternative destinations, each busy defining its own different proposals of value to position on one or more sectors of demand (obviously the amplification of the offer plays a decisive role in this competition, and here again the importance of wine tourism is evident for the completion of the area’s offer). The second of these is concerned with the contextual presence of competing tourist operators within the same destination. Therefore, in the tourism sector and within the destination there is the need for competing businesses to co-operate in order to increase the competitiveness of the entire destination. The competitiveness of a destination is

⁴ The term “prosumer” means the customer who becomes an integral part of the system providing the service. Customer participation means thus increasing integration between the functions of producer and consumer. (Normann R., 1992).

therefore significantly conditioned by the capacity to define the relationships of co-operation between competing businesses in the same destination.

3. Destination management strategies: a possible way to interpret wine tourism

Orientation towards the destination concept may be reached by identifying some aims pertaining to the process of strategic destination management:

- achievement of a common and shared vision of the development process which may be translated into concrete choices of competitive positioning;
- favouring the emergence of a “destination contract power” for different subjects and external systems which influence the specific competitiveness (for example: tour operators, airlines etc.)
- construction of a system of relations which involves the different destination actors and is directed towards supporting overall competitiveness and at the same time the different subjects operating within it.

The concrete possibility of making suitable progress towards these aims are also strongly influenced by real understanding of the different components of the destination offer system, and also by identification of the specific processes of co-ordination and integration between the components previously identified (Napolitano, 2000).

The complex system of a destination offer may be sub-divided into four different macro-categories of component elements (Franch, 2002):

1. The set of specific resources (natural, cultural, architectural, artificial, wine and gourmet cuisine etc.) which characterise the destination;
2. The set of “generic” resources (physical and/or technological infrastructures, environmental protection, quality of life, resident population hospitality, etc.);
3. The variety of tourism services “qualified” to meet tourist-customer needs;
4. The set of “intangible” resources (image and reputation of the destination, competence and professionalism of the different businesses and institutions operating on the destination, relational capital).

With reference to the first aspect it is evident that all the different territories have some type of specific tourism resource. However, in order to identify specific resources which can be components of a competitive destination system it is necessary to grade the different resources according to their capacity to be defined as specific “distinctive resources”⁵ to make the destination “unique” in perception of the specific tourism segment identified. A suitable mapping process of these resources requires not only a static, but also a dynamic, view (Napolitano, De Nisco, 2004). It is possible to identify some potential tourism resources which may become tourism resources by means of a suitable process of valorisation⁶. The reference to wine tourism seems almost superfluous when we consider that it is a relatively recent type of tourism offer and is the result of a development of wine producers from being “simple” mono-sector operators to a stage where they are able to diversify their own offer while still retaining their original distinctiveness.

The offer system of a destination is also made up of resources which are defined as “generic” because not strictly connected to tourism and which have a significant role in making a destination competitive. These resources mainly consist of the degree of physical

⁵ The distinctive resources of the businesses are differentiated and so determine different performances and in this way generate competitive advantages. (Barney, 1991; Grant, 1991; Peteraf, 1993; Hamel, Prahalad, 1994; Wernefelt, 1984).

⁶ Merely as an example see the role of architectural restoration of monuments, churches, palaces, old towns can play in the emergence of specific architectural and cultural resources in these areas.

access and access to information, to mobility within the destination and the capacity to make the destination welcoming. Achievement of this requires a continuous process of adaptation of the physical and intangible infrastructures in line with the “specific” tourism development of the destination (Napolitano, 2000).

The variety of basic tourism services is a factor determining the emergence of the destination (Tamma, 2002). In particular, it seems necessary to evaluate the dynamism of the congruity of the model of accommodation, restaurant services, incoming etc. of the destination in line with the specific strategic choices in competitive positioning. Therefore a quantitative and qualitative evaluation is needed of the system of tourism offer, in order to understand how the differentiated tourism services of the destination meet with the requirements of the different segments of the present and potential demand (Pechlaner, Weirmair, 2000).

Last but not least, the destination offer system is composed of those “intangible resources” which have a particularly significant role in the competitive destination process (Cantone, Risitano, Testa, 2007). In the first place, the image and reputation of the destination – image meaning the way in which the destination is perceived by the specific segment of the demand at which the destination - meaning the offer system – is aimed. Reputation pertains to the level of knowledge of the destination in the reference market. The competences and professionalism of the different business and institutions operating represent “intangible” strategic resources for the destination. A real evaluation of the stock of these resources in relation to the requirements of the market appears indispensable for any growth process of the area (Sainaghi, 2004). Further intangible resources are also represented by the level of trust in relations and by the inclination for institutional and inter-business collaboration of the different destination operators. In all of these aspects we can see the importance of the wine tourism offer as a component of the global creation of the set of intangible destination assets. Consider the importance – in terms of image and reputation – of the destinations Montalcino, Chianti, Barolo etc. or the contribution in terms of tourist attraction of the initiative promoted by the various wine routes.

The concrete definition of strategic processes of destination management starts with the qualification of the different elements making up the destination offer in relation to the strategic positioning imagined according to the potential expressed by the destination (Brunetti, 2002).

Not infrequently, there are cases of tourist destinations with evident tourism potential for a certain segment of customer demand due to specific “distinctive” tourism resources, but which are limited in their development by evident shortfalls in the quality of the other elements of the overall offer system (for example, the generic infrastructure resources or the limited capacity for institutional and/or inter-business collaboration). In this case, the processes of destination management firstly require the adaptation of the level of “quality” of the single components of the offer system in order to pursue the aims previously mentioned. For example, re-qualification of the accommodation system, or giving the destination adequate material and intangible infrastructures, or investment in the professionalism of the operators.

One indispensable element in the complete emergence of a destination policy is the definition of the offer system in its different components, but this alone is not sufficient. As we highlighted earlier, it is necessary to identify specific co-ordination and integration processes between the components previously identified. These processes may take different forms and have an extremely diversified level of formalisation⁷; it seems important to

⁷ This report analysed the different experiences of “wine routes” in Italy – about 107 – in order to identify points of excellence according to the capacity to create an organisational model able to incorporate different subjects into a system, and in this way to adequately valorise the potential of the area in the specific segment.

underline here that the real usefulness of these forms of organisation is apparent when it is able to express a vision which is coherent with the “qualitative” state of the different components of the offer.

4. Identifying the best Italian destinations in wine tourism

As we said at the outset, this study aims first of all to use analysis of certain parameters to identify the areas in Italy which have had the best results in terms of valorisation of their potential in wine tourism and which could therefore be considered destinations of excellence for wine tourism in Italy. In order to achieve this we carried out a comparison between different areas which have a significant wine-producing tradition, such as Tuscany, Friuli Venezia Giulia, the Veneto, Piedmont, Campania, Sicily and Apulia. This recognition is necessary to carry out a critical analysis of the results obtained to permit the identification of some significant management approach tendencies. These originate from a specific context, but can nevertheless contribute to formulation of guidelines for the valorisation processes of a tourism offer system directed towards wine tourism. The identification of the areas of excellence was carried out by joint analysis of the following qualifying elements of the area:

- A first reference parameter is represented by the wine routes defined as “excellent” by Censis in the VIth Report on Wine Tourism in 2007.
- In the second place we considered the relative proportion of quality wine production (DOC and DOCG) of total production referable to different territorial sectors. This parameter becomes important because it can provide an indication of the quality of wine production and of the reputation of the destination in the wine segment.
- Furthermore, we considered the quality of wine production in the different regional contexts. To achieve this, we measured the numbers per region of the wines defined as “super three stars among the best tasted” from the Veronelli “Gold Wine Guide”.
- Lastly, we analysed the quality of typical regional restaurant facilities, an aspect of the total tourism offer held to be closely connected to a position of excellence in the wine tourism sector. For this parameter we considered the restaurants mentioned in the Slow Food Guide as having a “rich and qualified wine list”.

The following tables present a particular of the results of analysis of these parameters.

Table 1. Excellent “Wine Routes”

“Valpolicella” wine route	Veneto
“Astesana” wine route	Piedmont
Barolo wine route	Piedmont
“Franciacorta” wine route	Lombardy
“Costa degli Etruschi” wine route	Tuscany
“Chianti Colli Fiorentini” wine route	Tuscany
South Tyrol wine route	Trentino Alto Adige
Doc Collio wine route	Friuli Venezia Giulia

Source: VIth Censis Report on Wine Tourism (2007).

Table 2. The quantitative and qualitative characteristics of wine production in the main Italian regions.

	DOC + DOCG wine 2005 in hectolitres (total quantity and % in Italy)	% quality wine of total 20004	Total wine production in hectolitres (total quantity and % in Italy)
Valle d'Aosta	11,300 (0,1%)	45.4%	22,000 (0.04%)
Piedmont	2,001,455 (18.2)	83.5%	3,263,000 (13.5%)
Friuli V.G.	714,906 (6.5% ⁹)	62.3%	1,344,000 (2.5%)
Veneto	2,238,874 (20.4%)	27.7%	8,843,000 (16.6%)
Tuscany	1,467,123 (13.3%)	55.7%	3,166,000 (6%)
Emilia Romagna	1,273,215 (9.7%)	27%	7,155,000 (13.5%)
Campania	193,216 (1.8%)	11.9%	1,878,000 (3.5%)
Apulia	376,482 (3.4%)	11%	7,610,000 (14.3%)
Sicily	234,908 (2.1)	4.5%	6,964,000 (13.1%)
ITALY	13,183,691	31%	53,133,000

Source: our elaboration of Istat data + Istituto Tagliacante elaboration of Chamber of Commerce data.

Table 3. Excellent wines in Italian wine sector

	Excellent wines (total)	Excellent wines out of Italian total
Piedmont	169	41%
Tuscany	116	28.6%
Friuli	21	5.2%
Veneto	22	5,4%
Apulia	5	1.2%
Campania	14	3.4%
Sicily	9	2.2%
Abruzzo	6	1.5%
Basilicata	8	2%
Calabria	3	0.7%
Sardinia	4	1%
South Tyrol	19	4.7%
Lombardy	6	1.5%
Liguria	1	0.2%
Valle d'Aosta	1	0.2%
Lazio	-	-
Emilia Romagna	2	0.5%

ITALIA	406	100%
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Source: Our elaboration of data from Veronelli Gold Wine Guide.

Table 4. Restaurants

	Number of restaurants	Percentage of total in Italy
Piedmont	56	11.4%
Tuscany	54	11%
Friuli	25	5.1%
Veneto	65	13.2%
Apulia	20	4.1%
Campania	36	7.3%
Sicily	12	2.4%
Abruzzo	15	3%
Basilicata	4	0.8%
Calabria	14	2.9%
Sardinia	1	0.2%
South Tyrol	22	4.5%
Lombardy	37	7.5%
Liguria	13	2.6%
Valle d'Aosta	4	0.8%
Lazio	28	5.7%
Marche	23	4.7%
Umbria	9	1.8%
Molise	1	0.2%
Emilia Romagna	54	11%
ITALY	493	100%

Source: Our elaboration of data from Slow Food Guide 2007

From analysis of the data shown in the tables above it can be seen that between the different territorial areas which are said to be significant destinations for wine tourism in Italy, those which can be considered as excellent are Piedmont (especially the areas of Asti and Cuneo), Tuscany (in particular the areas of Livorno and Florence) and Friuli Venezia Giulia (above all the area of Gorizia).

These different territorial areas all have the elements previously listed which we consider in this work to be the aspects which make an excellent destination for wine tourism.

First of all Piedmont, Tuscany and Friuli Venezia Giulia are the regions with the highest quantity of quality wines produced out of the total. In particular, 83% of the wine produced in Piedmont is DOC and DOCG; and this region produces 18.2% of the total Italian DOC and DOCG wines. The evident importance of quality wine production in this region is also confirmed by the presence of 169 Piedmontese “tastes” (41% of the national total) in the Veronelli Guide list of excellent wines. Similar considerations are also possible for Tuscany and Friuli, because these regions produce a significant proportion of the total of DOC and DOCG wines (Tuscany 55.7% and Friuli 62.3%) and likewise have many quality “tastes” (116 in Tuscany and 21 in Friuli).

The situation in regions like Apulia and Sicily is quite different, where there is a very high level of specialisation in wine production, but a very limited orientation towards quality wines (Apulia and Sicily are the Italian regions next after the Veneto for wine production in Italy – Apulia at 14.3% and Sicily at 13.1%). Only 3.4% of the wine produced in Apulia and

2.1% of Sicilian wines are DOC and DOCG, and another confirmation is provided by the fact that only 5 Apulian wines are among the “best tastes” proposed by Veronelli.

In Piedmont, Tuscany and Friuli we find five of the eight principal Italian “wine routes” classified according to the Censis report already mentioned. This information is certainly significant because the “wine route” is the most articulated and significant organisation of the territorial wine tourism offer. Finally, an aspect of importance is that these regions have been able to build a typical restaurant system over time which valorises the alliance between gastronomy and wine production. Indeed, about 27% of the total offer of typical Italian restaurants cited in the Slow Food Guide with “a rich and qualified wine list” is concentrated in Piedmont, Tuscany and Friuli Venezia Giulia.

5. Best wine tourism practices: managerial implications

Once we have identified the excellent destinations for wine tourism in Italy (Piedmont, Tuscany, Friuli Venezia Giulia) it is necessary to identify some best managerial practices for destination management which have made it possible for these destinations to emerge in the specific “wine tourism” sector.

The first element to consider is the existence of a direct and very close relationship between the quality of the wine produced in the area and the ability to attract wine tourists. The wine tourist, as we said previously, looks for consumer experiences which hinge on the quality of the wines offered. This makes the reputation of quality wines and indispensable element for the pursuit of successful strategies of competitive positioning in the specific tourism sector. From this we can see that the “simple” vocation of an area to produce wine is not in itself a determining factor for success in wine tourism. Apulia is the region with the highest percentage of land cultivated to wine grapes in Italy, but does not appear to have been able to create an adequate system of tourism facilities in the wine sector. This is mostly due to the lack of quality in the wine production system.

The quality of the wine offer is certainly necessary in order for the emergence of a quality “wine” tourism offer, but not sufficient. In the destination management sector, the quality of the “elementary” tourism resource (Rispoli, Tamma, 1996) needs to be integrated into a wide and articulated system in order to define a tourism product which meets all the needs of the customers.

Specifically, the destinations in Piedmont, Tuscany and Friuli Venezia Giulia have put into practice destination policies aiming at a systemic approach to valorise the different “specific”, “generic” and “intangible” resources necessary for defining tourism services directed towards the creation of an entire tourism product to position in the “wine tourism” sector.

In particular, this valorisation process originated in the recognised need to construct an offer system for wine based on an integrated set of specific tourism resources. These different resources are perceived by the specific customer group as being complementary to each other. The main basic tourist resources referred to are wine, foods and drinks and cultural resources. “Wine” has been turned into a tourism resource through the best practices mentioned by defining experience products connected to wine production which go beyond just tasting the wine, and transforming the places where wine is produced – wineries and vineyards – into specific places attractive to tourism. We think that we should mention the tendency of employing prestigious architects to renovate old winery buildings, to transform them into tourist attractions able to create a flow of specific tourism.

The integration of “wine” as a resource with the gastronomic resources of the area is based on the offer of “land food”, meaning the creation of gastronomic experiences whose very relationship to the area is their qualifying element.

Cultural resources are a complementary resource of extraordinary importance for excellent wine tourism destinations. “A wine trip” seems to be closely connected in consumer perception to enjoyment of the artistic and cultural heritages. This means that wine tourists and cultural tourists are very close in terms of some requirements concerning the whole consumer experience, such as the pursuit of “quality” tourism services, less importance given to cost when choosing the destination, and the need to have a high standard of hospitality services. Because of these homogeneous elements, the wine tourism destinations have an extraordinary attraction for tourists in the shape of their cultural resources; tourists perceive wine as a complementary element in the enjoyment of their trip while the artistic and cultural heritage of the area can be the main reason for choosing the specific destination. The combination of “wine-land food – artistic and cultural heritage” seems to be a unique combination of fundamental attraction resources in the wine tourism sector which characterises the different areas of excellence in Italy.

As we have highlighted, specific tourism resources need to be integrated with “generic” resources, specific tourism resources and “intangible resources” to become tourism destination products.

The analysis carried out so far shows the importance not only for an adequate system of transport and mobility infrastructures in order to reach the destination but also for adequate internal mobility and specific hospitality services to favour enjoyment of the differentiated tourism resources of the destination, especially because of the travelling involved in the consumer experience of this specific tourism sector.

Moreover, there has been significant investment in differentiated tourism services in the wine tourism destinations, which could represent a suitable response to the specific requirements of wine tourists because of their quality and the service level offered. The main tourism services which function in creating a destination offer system positioned in wine tourism can be ascribed to:

- high quality non-hotel tourist accommodation services ;
- definition of activity of specialised incoming tourism;
- service centres specialised in enjoyment of “wine” resources.

The destinations we analysed have known how to rethink the non-hotel accommodation situation, not as being synonymous with a low ratio of quality to price, but as a tourist accommodation system aiming to satisfy the specific expectations of the cultural tourist and the “wine” tourist; this means high quality together with the pursuit of an “authentic” consumer experience (Ferrari, 2005). We can mention as an example the significant investment in Tuscany to develop a high quality accommodation system based on farmhouse holidays, historic residences, old houses, hotels in old towns etc. There has also been a development of important business experience to meet the specific needs of wine tourists; among these, the construction of specialised routes and services to favour enjoyment of “wine” in the area.

These areas have also known how to build up a system of institutional and inter-company collaboration which has led to the great success of some “wine routes”. The success of these initiatives lies mainly in the high level of trust shown by the different actors in relations and in the ability to collaborate. The negative experiences of wine routes in Italy – often existing on paper, but not in operation – are the result of an unfortunately widespread tendency in collaboration between different economic actors, who think that the creation of collaboration is the starting point for having the same objectives, whereas in reality it should be the point of arrival, of formalisation of a route made up of shared objectives and operating strategies.

Initial conclusions and indications for further research

In the last few years tourism has developed an increasing complexity of styles and dynamics. It is recognised that here is no longer one standardised form of tourism, but a complex of differentiated “tourisms” which integrate with each other, compete and sometimes fuse to define various consumer styles and behaviours.

Wine tourism develops within this scenario. “A wine trip” is the main reason for travel or else is a very important element capable of influencing the tourists’ choice towards destinations which have a differentiated offer and propose wine as a resource. Wine tourism seems, therefore, to be a growing sector and to have good potential for future development. Moreover, wine tourists spend more than the average tourist and this means that these destinations have a competitive position able to ensure good economic returns for the entire offer system.

However, it is necessary to stress again the need to define the characteristics of a wine tourist, to have information as close as possible to reality and also to adapt the offer system to the main requirements of customer demand. Our work cannot reach definitive conclusions but can be considered complete concerning identification of the need to carry out further research into the characteristics of demand – we need a correct answer to the questions “who is the wine tourist” – and consequently on the need to adapt the offer, which we have dealt with here partly by examining the best practices mentioned before.

It is evident from information reported here so far that for many Italian areas with a big wine producing sector it is advisable to define destination policies directed towards wine tourism. The potential of different areas is due to our consolidated wine-producing tradition in Italy, but requires a specific destination management approach based on the relations between the different subjects operating in the area.

Some destinations have matured positive experiences which can be defined as excellent wine tourism destinations, and these help to highlight some possible lines of intervention to develop systems in areas which are still only potential wine tourism destinations. From what we have verified in this paper, some common management denominators seem to stand out in the actions of the different areas identified as excellent wine tourism destinations.

Firstly, we found that the success of a wine tourism destination depends on the capacity to integrate the “wine” resource with other elements such as gastronomy, cultural and landscape features, and especially with an accommodation model which is different from – but not inferior to – the traditional types of offer.

The best practices considered have been able to continuously feed into the positive “wine reputation-destination reputation” circle. In all the cases analysed the reputation of the wine represents the starting point for valorisation of the destination for wine tourism. Despite this, the possibility does not seem remote for an inverse process where the reputation of the destination could reinforce the potential of the wine sector in it (maybe not yet at a standard of excellence).

Lastly, but not of least importance, it is seen how the diverse territorial excellences have shown the capacity to construct institutional and inter-company collaboration (for example the “wine routes”). These are based on a widespread heritage of “resources of trust in relations” and a great tendency towards co-operation, and have become promoters of destination policies really able to qualify the demand for a systemic vision of the area.

Perhaps this last aspect is the crucial point for setting off the positive cycle mentioned above. There is no doubt that tourism – especially in the case of wine – is a particular form of use of an area, and so requires the existence of a strong alliance between the public and private sectors. Only when there is synergy between these is it possible for a systemic model

to emerge which - as we said at the outset – for success needs a governing body capable of governing the structure present in a certain context. Areas like Apulia and Sicily produce a lot of wine and have the potential (still partly unfulfilled) for tourism, and so should view this kind of tourism with particular attention and interest. The opportunities which exist in these contexts (wine and tourism potential) deserve the attention of researchers and suitable government choices able to set up a positive cycle of “satisfaction-attractiveness-value” which can fuel the socio-economic growth of an area.

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