

The Impact of Tourism Strategies and Regional Factors on Wine Tourism Performance: Bordeaux vs. Mendoza, Mainz, Florence, Porto and Cape Town

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- *Purpose: Wineries face an increasing need to add value to wine tourism experiences. The goal of this study is to measure the performance of wine tourism business in several wine regions of the world and explain how performance correlates with winery characteristics and the regional environment. We isolate four explanatory dimensions of performance: 1) investments in tourism, 2) products/services offered, 3) marketing strategies, as well as 4) external factors (e.g. regional capital).*
 - *Design: Based on an international survey launched by the Great Wine Capitals Global Network, we collected 186 surveys from six wine regions of the world: Bordeaux, Mendoza, Mainz, Florence, Porto and Cape Town. We analyze the structure of wine tourism activities, top sources of profits, wine tourism investments and other external contributing factors. We use a multiple regression analysis to show how the above four dimensions contribute to the performance of wine tourism, contrasting Bordeaux with the other regions.*
 - *Findings: We provide some preliminary answers for explaining wine tourism performance. The Bordeaux region puts a greater emphasis on the cultural and educational aspect of the wine experience based on the region's fame and historical capital. Other regions view their profitability originating more from a holistic approach, which encompasses wine tasting, hospitality and building a long-term relationship with the visitor. Interestingly, we find that the best performers in the Bordeaux region differentiate themselves by using strategies unique to the other group of regions, and vice versa.*
 - *Practical implications: We have made the first step in creating quality and performance benchmarks in wine tourism and our study contributes to the understanding of the success factors and other conditioning regional factors.*

Keywords: Wine tourism, Performance, Bordeaux, Mendoza, Mainz, Florence, Porto, Cape Town.

INTRODUCTION

The number of tourists visiting wine chateaux in the Bordeaux region during the period from January to August in 2007 was 11,355 visitors, and in 2010, the figure reached 14,754 visitors. A 30% increase in the span of just three years. Saint-Emilion, a UNESCO heritage village, and the Medoc wine country are the two main destinations attracting the most wine tourists in the region.

This growth in the wine tourism business has been supported by an expansion of associated services in the Bordeaux region. More than 480 wine chateaux, cooperatives and wine trade houses open their doors to visitors, year-round. Each week more than 40 specialized visits lining up wine tasting and chateaux tours take place and more than 20 offers of weekend-stays bringing together wine, historical heritage, spa and golf and trail explorations are made in vineyards around Bordeaux (CCIB, 2009). This adoption of wine tourism practices may be due to the fact that wine tourism has become an important alternate source of revenues given the competition between wine-producing regions.

According to Trip Advisor, in 2008 Bordeaux was number 1 in the Top 10 wine tourist destinations in the world before Napa Valley (California), Tuscany (Italy), the vineyards of Chili, South Africa or New Zealand. However, in 2012 Tuscany edged out in front of the wine-growing regions of France and Spain. Bordeaux moved in second place in the European ranking. What business strategies are used in these regions that yield in this type of success?

The goal of this study is to measure the performance of wine tourism business in the several wine regions of the world and explain how performance correlates with several winery and regional characteristics (Dodd, and Beverland, 2001; Charters and Ali-Knight, 2002; Orth et al, 2011). Specifically, we analyze how investments in tourism infrastructure, types of products/services offered, marketing strategies used, as well as other external factors such as regional capital impact the ability of wineries to attract more tourists and/or more spending per tourist. Our focus is to contrast the performance of the Bordeaux region versus a group of other wine regions: Mendoza (Argentina), Mainz (Germany), Florence (Italy), Porto (Portugal) and Cape Town (South Africa). The data was obtained from an international survey of wineries conducted by the Great Wine Capitals Global Network in 2011.

1. WINE TOURISM SUCCESS FACTORS: A REVIEW OF THE LITERATURE

Hall et al. (2000, p.83) define wine tourism as “touring vineyards, wineries, wine festivals, and wine exhibitions, where wine tasting and/or experiencing the attributes of the wine region are the principal factors of motivation for the visitors”.

In 2010, worldwide wine tourism generated about \$17 billion annual revenues. Wine tourism is attractive because it appears as a means of diversifying and growing wineries’ sources of revenues (Barney, 1991; Peteraf, 1993; Getz and Brown, 2006). However, it is clear that wineries have to be careful to adopt strategies that are adapted to their specific wineries and to the unique natural, human and historical capital of their region (Alant and Bruwer, 2004; Brunori and Rossi, 2000; Bouzdine-Chameeva, 2011). What are these “adapted” strategies?

Answering this question may help wineries and other wine industry actors such as tourism operators or local governments identify the key factors contributing to the success of the wine tourism business. Several factors related to the offering of wine tourism services are usually highlighted in the literature:

- External Factors
 - Regional Capital: Alant and Bruwer (2004) show that the “wine region” is a key motivational dimension for wine tourists’ behavior. They recognize that regional brand image and landscape are primary characteristics. Accessibility, proximity and infrastructure matter as well. Indeed, Carmichael (2005, p.191) suggests that “the rural landscape is an integral part of the wine tourism experience”. Mitchell et al. (2012) go further and argue that wine tourism should be situated in the wider context of the physical and cultural landscape in which it is taking place (Getz and Brown, 2006). Hall and Mitchell (2002) used the term “touristic terroir” to describe the combination of physical, cultural and natural environments that give each region its distinctive appeal as a destination for wine tourists. Both natural and cultural features are important, but attractiveness is also related to distance (real and perceived) to markets. Because of their central role, wine capitals like Bordeaux, Cape Town, Mendoza and Porto act as focal points for attracting wine tourists to the regions.
 - Regional branding: Durrieu (2008) defines the Regional Branding concept in case of French geographical characteristics such as PDO and PGI. These take into account the impact that individual and collective reputations, brand constellation, winemaker and styles have on buyers' perceptions of the product.
 - Alliances: Telfer (2001) emphasizes the importance of both horizontal and vertical strategic alliances, which entails cooperation between wineries, with the food industry, local crafts industry and tour operators.
- Activities Offered:
 - Food: From an experiential point of view (Pine and Gilmore, 1999), native food and wine representing the place of origin, as well as local landscape and culture, become fundamental elements in order to build a food and wine experience. According to this new view, food and wine events become polysensorial experiential units (holistic approach) through the “mise-en-scene” of different elements and the synergy of all operators.
 - Gastronomy: For instance, some researchers have mentioned the importance of collaborative relationships among stakeholders of a wine region (Wargenau and Che, 2006). In fact, the development of food and wine destinations through many centuries, as is the case of Mediterranean Europe regions (Brunori and Rossi, 2000) demonstrates that different consumer segments have a strong appreciation for travelling to rural areas to experience foods that are local, or that have been grown and produced locally for generations.
 - Wine Tasting; Getz and Brown (2006) emphasize that consumers desire visitor friendly wineries.
- Promotional Tools:
 - Branding: Vlachvei et al. (2012) argue that (Greek) wine firms would benefit more from cultivating networks with the tourism industry, which enhance brand loyalty and awareness.
 - Festivals: Mason and Paggiaro (2012) state that with the hedonic nature of the culinary tourism experience, the role of festivalscape has an increasingly intuitive appeal for management to generate emotional experience and enhance loyalty. Where “Festivalscape” refers to the way participants perceive a festival, both in its physical and affective manifestation.
- Investments: The early studies on wine tourism in the 1990s analyze the level of capital investment in wine routes and show that the development of routes increase costs and demand heavy management input (Dodd, 1993, Day 1996). Correia et al (2004) state that more than 70 % of wineries in their study carry out financial investments to upgrade their

facilities and improve infrastructure in Portugal. Most of the respondents emphasize their intention to make new investments in infrastructure in the future and regret the lack of financial support from governmental institutions.

2. SAMPLE AND METHODOLOGY

This study is based on wineries belonging to the Great Wine Capitals Global Network. The Great Wine Capitals is a Network of nine major global cities in both the northern and southern hemispheres, which share a key economic and cultural asset: their internationally renowned wine regions.

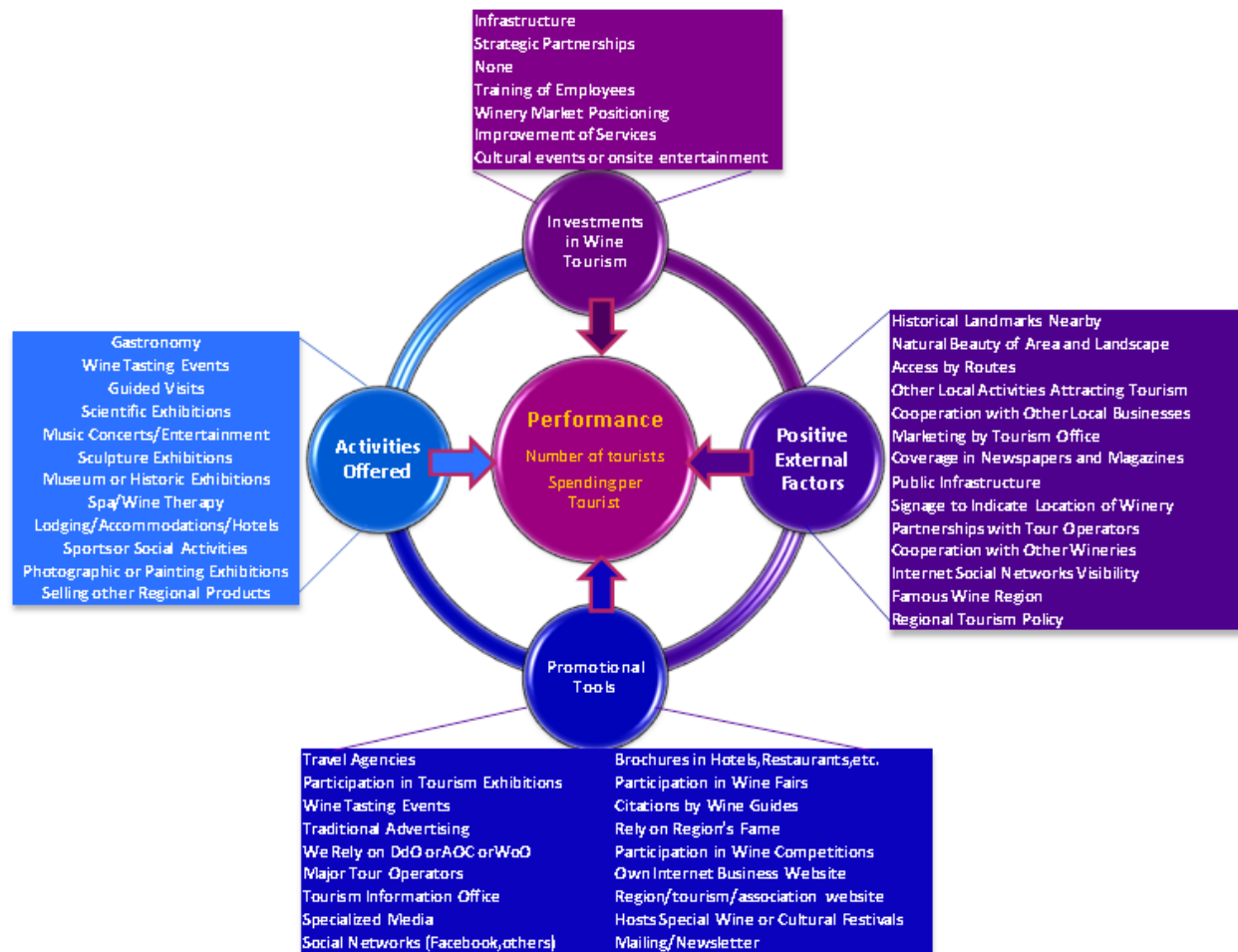


Figure 1: The Four Dimensions and Related Variables Used to Explain Wine Tourism Performance

During winter 2011/12 and spring 2012, through online and phone surveys, we gathered 186 surveys in six wine regions of the world: Bordeaux, Mendoza, Mainz, Florence, Porto and Cape Town. The surveys were administered to winery owners or general managers. The sample was split into two main groups. The choice of identifying two groups allowed the comparison of the wine tourism tools implemented in the Bordeaux region vs. the practices employed in five other

wine regions of world – Argentina, Germany, Italy, Portugal and South Africa.¹ We split the sample into two groups. Group 1 is composed of Mendoza, Mainz, Florence, Porto and Cape Town (91 responses) and Group 2 includes only Bordeaux (95 responses). Whenever appropriate for the validity of the analysis, we also created Group 3 composed of Mainz, Firenze and Porto. Group 3 regroups exclusively 'Old Europe' wine capitals. This helps us contrast Bordeaux with wine regions from different parts of the world (Group 1) and with others cities with –supposedly- similar culture and background about 'onsite wine experience' (Group 3).

The survey questionnaire covers the winery's owners' (or general managers') perception of visitors and several indicators of performance. The four main explanatory dimensions of performance in wine tourism are detailed in Figure 1. These are: Investments in Wine Tourism; Activities Offered; Promotional Tools and Positive External Factors.

All explanatory variables belonging to these four dimensions shown in Figure 1 are dichotomous variables (Yes= 1/No= 0). For example, the category Gastronomy encompasses gastronomy and food.

Given the paucity of quantitative answers received regarding revenues or business expenses linked to wine tourism, we use *Number of Tourists* and *Spending per Tourist* (i.e. the average expenditure per tourist at the winery) as our two performance measures to conduct an explanatory analysis. We use Size in Hectares as the control variable for capturing the size of the winery, given that alternate measures asked in the survey, such as the market value of the property received very little responses.

To analyze the key determining factors of wine tourism performance, we perform an OLS regression of the *Number of Tourists* visiting a given winery and/or *Spending per Tourist* onto the exogenous variables listed in the above four main dimensions.

It is important to point out that the responses we obtained regarding performance and those related to external factors having a positive impact on the business were self-reported and not independently and objectively measured.

3. SURVEY RESULTS AND ANALYSIS

Table 1 illustrates the basic characteristics of the average wine tourist in a global sample and in Groups 1 and 2. The vast majority of visitors are males (67%) and above 35 years old with a dominating category of persons between 35 and 55 years old. A large percentage of visitors are nationals (45%). The visitors to French wineries tend to be older and are comprised of a larger percentage of women. Fewer foreigners come visit the Bordeaux wineries relative to the count given by Group 1 cities.

We asked wineries to give a breakdown of their main sources of wine tourism revenues. Overall, wine sales constitute the lion's share of wine tourism sales. Interestingly, food and other services occupy a more important position among Group 1 at about 24% of sales vs. Bordeaux only at 9%. In terms of activities offered, most wineries offer wine tasting and guided visits as

¹ Given the small number of responses in the group 1 regions we had to treat these wine regions as a homogenous group, even though we understand that European regions may be a more homogenous group. To reflect that point, and whenever appropriate for the validity of the analysis, we also created Group 3: Mainz, Firenze and Porto of European wine capitals.

their main activities. We find that Group 1 tends to offer more lodging and cross-selling of other regional products, than Bordeaux region wineries. On the other hand, Bordeaux wineries consider arts (painting, photo) exhibits and entertainment activities (concerts) more important.

Table 1: Demographic Characteristics of Visitors.

	AGE DISTRIBUTION		WOMEN vs. MEN		Locals & Nationals vs. Foreigners	
Whole Sample	Less than 35	15%	Women	33%	Locals	18%
	Between 35 and 55	48%			Nationals	45%
	More than 55	37%	Men	67%	Foreigners	37%
Mendoza, Mainz, Firenze, Porto, Cape Town	Less than 35	12%	Women	24%	Locals	17%
	Between 35 and 55	44%			Nationals	42%
	More than 55	44%	Men	76%	Foreigners	41%
Bordeaux	Less than 35	17%	Women	43%	Locals	19%
	Between 35 and 55	51%			Nationals	48%
	More than 55	32%	Men	57%	Foreigners	33%

The top sources of wineries' profits are first and foremost from high-end and middle priced wines. Wine tasting fees, accommodations and food services represent bigger profit centers for Group 1 as compared to Bordeaux wineries. For Group 3 cities (Group 3: Mainz, Firenze and Porto) the contrast is even more pronounced, with a greater emphasis on accommodations.

Concerning the investments in wine tourism, wineries report that their main investment has been in infrastructure. Group 1 wineries put more emphasis on investing for improving services, brand positioning and training employees while Bordeaux counterparts have put more emphasis on investing in infrastructure and in cultural events.

Having asked the wineries about the external factors that contribute the most to help their wine tourism business, the dominant response is the goodwill capital generated by the brand reputation of the wine region. The Bordeaux sample puts a heavier emphasis on that category and on marketing by tourism office. On the other hand, Group 1 capitals put a greater emphasis on natural beauty, and partnership with tour operators as well as regional tourism policy.

To study wine tourism performance we perform an OLS regression analysis to explain the *number of tourists* visiting a winery (see Tables 2 and 3 below). We correct for the effect of a winery's size, as bigger wineries should be attracting more tourists. We find that investments in employees training correlates the with increased tourist visits. The regional capital embodied with the region's fame is also a contributing factor. Investing in improved services helps.

The next findings are surprising. Marketing by tourism office, AOC DdO or WoO appellations and investments in infrastructure are *negatively* correlated with visits. We must point out that the variable Marketing by Tourism Office is not an objective variable, but rather an assessment by wineries of how helpful the marketing from their tourism office is. Hence, the result may just be a reflection that wineries *who struggle more* find the marketing done by their Tourism Office more valuable.

TABLE 2: OLS Regression of Wine Tourism Performance (Bordeaux)

	Number of tourists		Spending per Tourist	
Size in hectares	17.63	(4.57)***	0.02	(0.65)
Infrastructure	-1910.34	(-1.95)*	29.70	(1.85)*
Strategic Partnerships	21.78	(0.02)	22.76	(1.51)
Training employees	2294.63	(2.90)***	-15.21	(-1.06)
Improved Services	1368.05	(1.9)*	-3.64	(-0.28)
Landmarks Nearby	821.55	(0.93)	16.09	(1.08)
Easy Access	-986.58	(1.04)	-5.31	(-0.32)
Marketing by Tourism office	-2194.11	(-2.24)**	-0.14	(-0.01)
Signage	923.11	(0.77)	-4.07	(-0.2)
Partnership with Tour Op	-132.59	(-0.11)	-28.54	(-1.3)
Internet Visibility	-327.42	(-0.3)	29.48	(1.52)
Famous Wine Region	2125.11	(2.38)**	29.13	(1.8)*
Gastronomy	1213.41	(1.46)	-21.73	(-1.64)
Wine Tasting Events	908.00	(0.44)	92.19	(2.61)**
Guided Visits	-1522.87	(-1.02)	-26.08	(-1.00)
Entertainment	76.07	(0.11)	-20.71	(-1.65)
Sculpture Exhibits	1122.57	(1.23)	-5.40	(-0.34)
Museum Exhibits	77.49	(0.07)	7.08	(0.4)
Lodging and Hotels	-271.82	(-0.3)	21.32	(1.4)
Sports or Social Activities	522.40	(0.51)	-21.77	(-1.19)
Photo or Painting Exhibits	261.65	(0.33)	7.00	(0.51)
Other Regional Products	-137.64	(-0.18)	0.13	(-0.01)
Travel Agent	1441.73	(1.42)	33.77	(1.76)*
Tourism Exhibitions	-117.29	(-0.1)	-13.69	(-0.66)
Traditional Ads	639.14	(0.43)	-27.08	(-1.15)
Appellation	-3293.46	(-2.06)**	1.47	(0.06)
Social Network	-502.79	(-0.52)	-13.62	(-0.74)
Brochures in Hotels	763.74	(0.93)	-0.62	(-0.05)
Wine Fairs	913.30	(1.08)	-14.31	(-1.00)
Citations by Wine Guides	-321.34	(-0.37)	-1.34	(-0.09)
Own Website	930.39	(1.25)	-13.84	(-1.06)
Association Website	391.66	(0.46)	6.67	(0.48)
Special Festivals	-1954.13	(-1.29)	10.05	(0.38)
Newsletter	-1085.71	(-0.75)	68.14	(2.73)***
Constant	-304.04	(-0.12)	-46.13	(-1.02)
Observations	74		72	
R-squared	0.78		0.55	
Adj. R-squared	0.59		0.14	

Coefficients followed by t-statistic in parentheses. * significant at 10%; ** at 5% and *** at 1%

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The more troubling result is the one about Investments in Infrastructure, which is negatively correlated with the number of tourists. It may be a case here that some large wineries in the Bordeaux sample have reached their tourism capacity and maximized their clientele, and as such, incremental investments do not improve the numbers. Other surprising results are the fact that Wine Tasting and Traditional Ads do not seem to contribute to bringing more visitors. A possible perspective is that wineries who find these strategies very valuable are the ones who are the least effective at bringing in more visitors. Or, it may be the case that they choose not to concentrate on bringing larger numbers, but rather on bringing the “right-type” of customers, for example seeking to attract connoisseurs or “serious leisure” type tourists (Brown and Smith, 2010).

The next step of our analysis of performance is to analyze *spending per tourist* (See Tables 2 and 3). For Group 1 capitals we find that the more wineries use Wine Fairs the higher the

spending per tourist. Signage is also a strong positive factor as it contributes to a successful business. Own Website and Citations in Wine Guides and magazines also play a positive role. However, because Citations had a negative effect on the number of tourism, we can deduce that for these kinds of wineries a more select clientele is probably sought out. Amongst other variables, Travel Agencies, Internet Visibility, Wine Tasting events and Gastronomy are statistically insignificant. This finding may be due to the fact that these factors are not *a-priori brand discriminators*, in the sense that most wineries in the business of offering onsite degustation will consider this as an important element of the business (Charters and Pettigrew, 2005). Indeed, as seen previously, more than 80% of wineries consider this an important activity.

TABLE 3: OLS Regression of Wine Tourism Performance (MMFPCT)

	Number of tourists		Spending per Tourist	
Size in hectares	22.98	(0.81)	-0.04	(-0.34)
Infrastructure	13196.79	(1.2)	0.86	(0.03)
Strategic Partnerships	-3294.12	(-0.23)	55.41	(1.04)
Training employees	-2988.18	(-0.24)	19.80	(0.48)
Improved Services	11999.34	(1.03)	44.25	(1.14)
Landmarks Nearby	-49521.55	(-3.13)***	-117.09	(-2.22)**
Easy Access	8818.47	(0.56)	-5.55	(-0.1)
Marketing by Tourism office	35838.20	(1.51)	18.17	(0.15)
Signage	-6357.94	(-0.32)	116.59	(1.99)*
Partnership with Tour Op	10789.77	(0.91)	-22.83	(-0.51)
Internet Visibility	35087.31	(2.36)**	-49.36	(-0.97)
Famous Wine Region	19960.20	(1.48)	28.94	(0.8)
Gastronomy	10392.52	(0.89)	0.92	(0.02)
Wine Tasting Events	21720.98	(0.99)	-6.00	(-0.1)
Guided Visits	-21776.95	(-1.13)	-70.32	(-1.29)
Entertainment	12964.02	(0.85)	17.45	(0.33)
Sculpture Exhibits	22139.09	(1.31)	-47.69	(-1.06)
Museum Exhibits	-39507.69	(-1.83)*	-23.70	(-0.45)
Lodging and Hotels	-20143.86	(-1.65)	-27.09	(-0.66)
Sports or Social Activities	-13690.77	(-1.07)	-30.02	(-0.75)
Photo or Painting Exhibits	40160.40	(2.52)**	48.41	(1.13)
Other Regional Products	-20146.32	(-1.76)*	16.41	(0.41)
Travel Agent	20626.69	(1.51)	53.13	(0.99)
Appellation	47140.16	(1.72)	96.46	(1.51)
Social Network	11398.36	(0.69)	-32.40	(-0.63)
Brochures in Hotels	-51894.91	(-2.36)**	-87.86	(-1.34)
Wine Fairs	-11197.17	(-0.79)	117.04	(2.46)**
Citations by Wine Guides	-19794.45	(-1.48)	56.34	(1.25)
Own Website	-6301.99	(-0.43)	75.50	(1.41)
Association Website	-17935.48	(-1.36)	-83.93	(-2.08)
Special Festivals	-19484.23	(-1.08)	-6.60	(-0.13)
Newsletter	-18735.37	(-1.3)	53.42	(1.18)
Dummy Mendoza	-81091.93	(-2.74)	9.23	(0.1)
Dummy Firenze	-14773.66	(-0.82)	-25.91	(-0.5)
Dummy Porto	884.5012	(0.04)	6.45	(0.11)
Dummy Cape Town	-49420.71	(-1.14)	-166.16	(-1.38)
Constant	29576.11	(1.41)	40.54	(0.57)
Observations	55		54	
R-squared	0.72		0.8	
Adj. R-squared	0.17		0.37	

Coefficients followed by t-statistic in parentheses. * significant at 10%; ** at 5% and *** at 1%

In the case of Bordeaux wineries, Newsletters are a differentiating factor that seems to give a competitive edge. Wine Tasting events now is a strong discriminating factor. In that case, the fact that many wineries who do not offer this activity do poorly, as this activity may constitute a minimal business practice. Infrastructure Investments, Famous Wine Region and Travel Agencies are also strong contributing factors. It is tempting to infer that wineries which utilize

these promotional tools and make these investments have a comprehensive and coherent business strategy that is indeed paying off. However, this inference lacks solid evidence and needs further investigation. In particular, information about underlying practices is missing.

We also asked the wineries about their outlook regarding future (growth) performance. While Group 1 wineries are less optimistic about wine tourism revenue growth forecast for 2012 than their Bordeaux counterparts, Group 1 wineries are relatively more convinced that, over the next five years, wine tourism will grow faster than their other revenues and that wine tourism is a strong and viable source of alternate income. At the same time, these wineries anticipate that wine tourism will reach full capacity at their winery over the next five years.

4. MANAGERIAL IMPLICATIONS AND CONCLUSIONS

This research is still exploratory and based on a survey that has inherent limitations due to for example to the fact that performance is self-reported and not independently and objectively gauged. A related bias is that professionals might be prone to over-emphasizing the attractiveness of their wine or wineries, rather than the bundle of cultural and recreational experiences that consumers desire (Getz and Brown, 2006).

Nonetheless, this study has produced some preliminary answers regarding the impact that wineries' strategies (activities, investments, promotional tools and external factors) have on business performance. First, it is reassuring to find that wine tasting and guided visits are the main tourist activities offered by the large majority of wineries. Wineries in Group 1 (Mendoza, Mainz, Firenze, Porto and Cape Town) view their profitability originating more from wine tasting and accommodations than Bordeaux wineries.

From the data analysis, we conclude that Group 1 wineries put more emphasis on a holistic tourism experience with the wine experience as a key component. They use more tour operators and other means of connecting with their clientele and create an emotional attachment with the winery. Bordeaux wineries put more emphasis on investing in the cultural and educational aspect of the wine experience and rely more on the region's fame and historical capital. In that sense, *regional capital*, which includes the geological features, the cultural and historical landscape as well as the reputation of wines (Durrieu, 2008), appears to be a conditioning factor that shapes the approach towards wine tourism.

If we were to distill the essence of the managerial implications from this research it would be that: wineries which perform well in *one* group do so by selecting and adapting few strategies from the set widely used by the *other* group.

1. In terms of attracting tourists, Group 1 capitals benefit from offering unique experiences to their visitors, in particular some type of cultural or arts exhibitions. Internet visibility is also a key winning strategy.
2. On the other hand, Bordeaux wineries that attract more visitors seem to emphasize employee training and improving services.
3. In terms of attracting more spending per tourist, Group 1 wineries do better based on participating in wine fairs. Regional capital (e.g. signage) matters to them as a success factor.
4. Bordeaux wineries that attract more spending use promotional tools such as newsletters and travel agencies in combination with wine tasting events. These strategies are supported by overall investments in tourism infrastructure.

Several questions remain open that are beyond the scope of this study. How is performance impacted across different generations of customers that have different motivations for wine tourism; and various levels of revenue (Carlsen, 2004)? Is it possible that wine tourism adds volatility to wineries' profits because it distracts from the core activity? We leave these themes for future exploration. Ultimately, our aim is to create quality and performance benchmarks in wine tourism to follow the evolution of the situation on an annual basis.

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