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## Article

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# Italian wine tourism and the web: A necessary wedding

A Business Article by Donatella Cinelli Colombini\*

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## Abstract

Director and founder of “Fattoria del Colle” agritourism and “Casato Prime Donne” winery (Montalcino), Donatella Cinelli Colombini has published books about wine business and tourism and received numerous awards for her entrepreneurial activities, such as “Best Italian producer” in 2003 and “Vinitaly International Award” in 2012; moreover, she was Tourism Councilor for the Municipality of Siena from 2001 to 2011. In this business article, the author examines the Italian wine tourism market, which has a huge potential but it is still not fully exploited, supplying suggestions for possible effective strategies to improve its success.

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How to make tourism an effective business for the wine? As a matter of fact it already is, but tourism could vastly increase its contribution in favor of wineries, wine-growing districts and the entire Italian economy. But how?

In order to answer this question, this discussion will analyze the opportunities and problems of the Italian wine tourism market, which is the first “export” market for most of the 35,000 wineries that bottle with their own brand; in conclusion, the tools to intercept more visitors will be discussed.

This analysis requires some context data. Tourism is a sector that is growing a lot: in 1950 there were 25 million travelers in the world, today they are more than one billion, and, probably, this number will nearly double by 2030. This huge stream currently generates the 9% of the Gross Domestic Product of the planet. In 2012, 45 million travelers arrived in Italy; they spent 32 billion euros, the healthiest part of the Italian trade balance. Researchers estimate that 11% of the tourism revenue is due to food and wine, so this means that foreign visitors spend 3 billions and a half per year for

these goods. The effects of internal flows must then be added to these data: in recent years food tourism by Italian citizens has grown tremendously due to the pursuit of saving and health benefits. According to the National Tourism Observatory, the majority of “gourmand tourists” are Italian and, according to the well-known Negroni survey, in 2009 “foodies” (people who particularly enjoy food) were 8% of the entire Italian population.

High quality food, wine and cuisine with strong components of typicality are therefore important tourist attractions, insomuch as, according to certain inquiries, they even exceed the huge Italian national artistic heritage (and they are always indicated as the “favorite memories” of those who travel to Italy).

If we focus on the behavior of food tourists in the wine districts, and anticipating some aspects of the demand that will be discussed later, it is possible to distinguish two types of winery visitors: those who are looking for a wine with good quality-price ratio and those who are attracted to excellence bottles. Among Italian citizens, one third of the entire population shops in wineries.

The dynamics of these two segments are slightly different: according to Mediobanca, sales of wine with a good quality-price ratio represent 7.8% of the total revenue, while those of high quality wines are over 10%.

Data show a large prevalence of cheap supply and that only 1200 of the 21,000 wineries with direct sales are equipped for tourism hospitality – meaning designated areas for sales and tastings, tours and merchandise, English speaking staff, public restrooms.

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Wineries, though often disorganized, give a lot of importance to the direct sale because it provides immediate cash income with unbeatable profit margins; this is the main reason for the high number of wineries open to the public and their constant increase.

However, many advances have occurred in the last twenty years. In 1993, the year the “Open Cellars” event was inaugurated, all the wineries were designed just to produce, and only later a part of them was adapted to welcome tourists. Today, on the other hand, tourist hospitality is planned at the early stages of projects for new production facilities.

There are currently four types of “tourism wineries”: the functional ones, where the main attention is on enology and very little is left to romanticism; the monumental ones, designed by great architects; the castles and villas of great historical and artistic importance; the “passion chests”, where everything revolves around wine and the attempt to achieve excellence.

Everyone can have a role in the wine market, and the game is not won by those who produce more but by those who achieve the best reputation for their wines, their hospitality, their diversity and their ability to make themselves known. There are opportunities for everyone, large or small, but everyone must be unique: from Antinori's Bargino winery to the small family cellar where grandpa receives his guests by the fireplace and serves his wine with homemade ham while explaining how he chooses the best grapes one by one.

The 3–5 million visitors that every year head toward wine areas with the intention of purchasing rare bottles and to gather first-hand information belong to several behavioral groups and several nationalities. Simplifying, it is possible to group them in four typologies: accidental tourists in organized trips; classic wine tourists with a higher wine and enological culture; opinion leaders who often turn wine into a cult object; luxury lovers looking for exclusiveness at any price. Each of them looks for different types of wineries and needs to be welcomed in a different way.

In Italy, there are wineries equipped to satisfy any demand, because no Country in the world is able to provide such a number of diversified wine-making facilities with good wines, excellent local cuisine, beautiful landscapes and culture.

After a brief examination of the supply, let us see some aspects of the demand. Wine tourists are mostly male (61%), between 30 and 50, with academic qualifications and high income. Italian visitors often opt for a self-organized trip, while USA visitors usually take advantage of wine tours with a polyglot and wine-expert guide. The new big spenders are the Brazilians and the Russians, the latter responsible for 29% of the tax free purchases in Italy in 2012.

Wine tourism has an above average daily expenditure, thus represents a segment of richer visitors, and, according to Censis (Wine Tourism Observatory for the Cities of Wine), spreads its beneficial effects over the whole territory: each euro spent on wine produces at least four euros spent on meals, sightseeing tours or shopping. Wine tourism is able to create a dynamic development and an increase in employment in entire areas, although in the vast majority of cases it is limited to short day trips.

But let us focus on the main issue now: why does wine tourism produce 60–80% of winery revenue in Napa or Stellenbosch or even in new areas such as Niagara Falls in Canada but not in Italy? Why is the growth of the wine tourism business in Italy so slow and incoherent?

We can find a first answer by taking a look at the drivers of such a form of tourism: information technology, management and accessibility. Italy is not performing well on either of these.

Let us start from the latter: a winery is usually considered accessible when the necessary time to reach it is less than 6 h. In the current scenario, dominated by short trips of 1 or 2 days, travel time decreases and visitors choose locations that are better connected to airports and train stations and those that are able to communicate a comfortable, easy and convenient way to get there. Connection and transportation are key issues that must be better addressed in a joint effort by the public and private sector.

In terms of management, then, things are going wrong. The wine tourism supply is organized in 170 “Wine Roads”, but only a dozen of them are really working. There is no national coordinating body, with the exception of “Cities of Wine”, and, moreover, there is no useful information on the official Italian Tourism website, that only provides a brief text page with links to other websites and statutes and procedural that bear no interest for visitors.

Yet, the Italian expenditure for tourism promotion is much higher than that of the competitors: twice the expenditure of France, three times Spain's, and 10 times the expenditure of the United States (and all these Countries centralize their communication through a national body, while Italy manages the whole thing through Regional Authorities). The result is a dispersion of resources and strength. Then, if we look at the web traffic of “Wine Roads” sites, the situation is even worse: the only website with a decent traffic is “Flavors of Trentino”, in the 1,174,734th position. Wine tourism is virtually invisible on the web, as it was shown at Vinitaly 2013 in the “Wine and Social Media: The netnography for a strategic approach to the new marketing of wine” symposium.

But the web is the key for tourism. Even in Italy, not the most digitalized nation of the world, 10% of all the tourism business and 30% of the bookings happen online. According to TripAdvisor, mobile phones or smartphones will be crucial for orienting visitors during their travel experience. Future travelers will not ask for information anymore and will look at the web for guidance on what to see, where to eat or sleep and what to do. In other words, all the useful information to turn a tour into something unique will be available online.

Virtual word of mouth has replaced the real one also in the wine tourism; this year CENSIS has reported that in 89% of the cases wine lovers can be intercepted online. Even the Cst survey conducted in 2012 for the Wine Tourism Movement, confirmed the preponderant role of the internet: the use of social media by wine tourists is six times higher than average and two thirds of winery tours are planned online.

In conclusion, a brief synthesis and a few proposals. Wine tourism potential in Italy is huge – according to TripAdvisor's Choice Award 2012, Tuscany is the most attractive destination

in the wine sector – but, on the other hand, economic and territorial development results are lower than those of foreign competitors. In order to reduce this gap, Italy needs direction, and it should come from a national director's chair; coordination aimed at improving and standardizing hospitality in wine areas and at increasing its visibility on the web is strongly needed, using a single, national database and building strong international connections with wine lovers through social media. This might be the only way to attract millions of wine tourists from around the world, take part to international fairs and draw up effective agreements with airlines, car rental companies, tour operators, etc. This is not an easy task, especially in a Country like Italy, where a national tourism coordination plan for the 2013–20 period, loudly asked for by the enterprises, has already faced the opposition of Regional Administrations.

Even if a referendum ruled for the abolition of the Ministry of Tourism in 1993, and despite the possible loss of autonomy by local administrations, the birth of a new national authority seems to be the only way to transform the excellent individualities of the Italian wine sector into a well organized team able to face foreign competitors, create new job opportunities and encourage development in wine growing areas. Following the example of “Wine Roads”, other “roads” should be created for the many excellences of local food productions (cheeses and especially Parmigiano, but also salami, truffle, pistachio, etc.) in a new plan based on many strong and distinctive profiles, and completely different from the current situation based on

the 170 “Roads of Wine and Flavors” which both marketing and common sense suggest to reformulate.

Making Italy the “Land of Plenty” would be good for everyone.

Reading Boccaccio's Decameron helps to understand the ancient attraction for Italian tastes:

*«Maso rispose che le più si trovavano in Berlinzone, terra de' Baschi, in una contrada che si chiamava Bengodi, nella quale si legano le vigne con le salsicce e avevasi un'oca a denaio e un papero giunta; ed eravi una montagna tutta di formaggio parmigiano grattugiato, sopra la quale stavan genti che niuna altra cosa facevan che far maccheroni e raviuoli e cuocerli in brodo di capponi, e poi gli gittavan quindi giù, e chi più ne pigliava più se n'aveva; e ivi presso correva un fiumicel di vernaccia, della migliore che mai si bevve, senza avervi entro gocciola d'acqua.»*

*“Maso replied, ‘Chiefly in Berlinzone, in the land of the Basques. The district is called Bengodi, and there they bind the vines with sausages, and a denier will buy a goose and a gosling into the bargain; and on a mountain, all of grated Parmesan cheese, dwell folk that do nought else but make macaroni and raviuoli, and boil them in capon's broth, and then throw them down to be scrambled for; and hard by flows a rivulet of Vernaccia, the best that ever was drunk, and never a drop of water therein’.”*

Boccaccio, Decameron, Eighth Day, Novel III