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Article

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The development of wine tourism in the Conegliano Valdobbiadene area

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Abstract

Tourism has increased significantly in the last decades, in terms of both international visitor flows and revenues.

Within these dynamics, assuming the Australian model of wine tourism, which is dominant in many wine-growing areas, the study aims to verify the development stage of Conegliano Valdobbiadene DOCG, one of the most important enological districts in Italy.

The paper is divided in three parts. The first introduces the principal changes that have regarded tourist flows in Italy and in Veneto, which is the most important tourist region in the country. The second and third parts describe some of the interpretative models of international (Australia, Argentina, California) and national (e.g. Piedmont, Campania) wine tourism demand in relation to the types that characterize the supply in the case study. In the fourth part, using multivariate analysis methods, the case of Conegliano Valdobbiadene DOCG is investigated by means of a study conducted on a representative sample of 130 wineries.

The choice of the model is validated in the case of Conegliano Valdobbiadene DOCG. The results reveal that the area is at a take-off stage, with as yet unrealized development potential. This model could therefore be usefully extended to other wine tourism situations.

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Keywords: Conegliano Valdobbiadene – Prosecco; Wine expenditure; Wine tourism type

1. Introduction

From 1990 to 2012, tourist arrivals worldwide increased by 52.7%, with an increment of 126.3% in revenues. In Italy, arrivals increased by 12.6%, with a respective revenue increase of 49.8% ([United Nations World Tourism Organization, 2013](http://www.unwto.org/)).

In terms of Italian tourism, Veneto represents the first region for registered tourist flows during 2012. The presence of tourists in Veneto has increased, reaching 62.3 million, while arrivals are attested at around 15.8 million ([Table 1](#)). In 2012, arrivals in Veneto, 64.7% of whom are foreigners, have seen a significant increase of 2.2% on a yearly basis. Foreign number of nights have also been distinguished by a significant leap forward, reaching 64.8% of the total, with an increase of 2.7% over 2011 ([Direzione Sistema Statistico Regione Veneto, 2013](#)).

Veneto's positive performances, highlighted in the short term, are confirmed by the long-term flow dynamics, which denote an increase both in total arrivals, by +58.2%, and total number of nights, with +45.5% over the period 1997–2012.

In Veneto, tourist destinations can be classified as follows: seaside, mountains, lakes, cultural, enogastronomic, territorial/cultural/other. Enogastronomic tourism, in particular, represents a more 'elite' tourist profile with a high level of per capita daily expenditure ([Manente, 2011](#)).

Wine tourism accounts for an important part of the tourist flows in Veneto, if it is considered that, in 2012, the average expenditure by foreign tourists for the purchase of enogastronomic products was 123 euro per presence, a clearly higher value than the average expenditure incurred for other types of tourism (seaside, lakes, mountains, culture, etc.) and higher than the average expenditure in 2011, which was 95 euro per presence ([Manente, 2013](#)).

Wine tourism has been configured, in recent years, as a complementary way for generating income and employment in rural areas ([López-Guzmán and Sánchez Cañizares, 2008](#)). In fact, the changes that have occurred in rural areas, in the wake of globalization, have led to attempts to broaden their economic base by including tourism, which has become part of a natural progression toward 'outsourcing' ([Hall and Mitchell, 2000](#)). Therefore, in many

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Table 1

Arrivals and nights: evolution of tourist flows, Veneto Region, 1997–2012.

Source: processing by Veneto Region – Direzione Sistema Statistico Regione Veneto on ISTAT data - Veneto Region, 1997–2012.

Year	Arrivals Italians Number	Arrivals Foreigners Number	Nights Italians Number	Nights Foreigners Number	Total Arrivals Number	Total Nights Number
1997	4,074,740	6,279,865	22,612,149	28,540,277	10,354,605	51,152,426
1998	4,237,067	6,671,979	22,800,213	29,289,706	10,909,046	52,089,919
1999	4,322,428	6,764,985	22,779,298	30,575,726	11,087,413	53,355,024
2000	4,346,641	7,157,391	22,837,376	31,771,353	11,504,032	54,608,729
2001	4,561,869	7,416,730	23,853,958	33,641,809	11,978,599	57,495,767
2002	4,563,340	7,120,766	23,025,006	32,053,954	11,684,106	55,078,960
2003	4,839,042	6,929,344	23,913,223	30,867,152	11,768,386	54,780,375
2004	4,816,379	7,247,161	23,226,187	31,003,410	12,063,540	54,229,597
2005	4,908,741	7,560,294	24,238,664	32,148,965	12,469,035	56,387,629
2006	5,259,983	8,179,183	24,750,848	34,267,725	13,439,166	59,018,573
2007	5,425,777	8,728,844	25,061,269	36,119,516	14,154,621	61,180,785
2008	5,592,350	8,537,715	24,931,038	35,676,417	14,130,065	60,607,455
2009	5,563,706	8,381,466	24,540,195	35,904,079	13,945,172	60,444,274
2010	5,609,809	8,973,933	24,097,540	36,722,175	14,583,742	60,819,715
2011	5,753,964	10,011,664	24,064,763	39,336,230	15,765,628	63,400,993
2012	5,588,021	10,230,504	21,964,597	40,387,060	15,818,525	62,351,657
Growth (%) 1997–2012	37.1%	62.9%	–2.9%	41.5%	52.8%	21.9%
Yearly average growth rate (%)	2.5%	4.2%	–0.2%	2.8%	3.5%	1.5%

New World wine regions, and increasingly in traditional wine-growing areas in Europe, wine tourism is seen as a means to combat the effects of rural restructuring (Hall and Mitchell, 2000).

The objective of this research is to verify, on the supply side, with regard to the models of wine tourism development, the positioning of the Conegliano Valdobbiadene DOCG situation, in a wine-growing area of the Veneto where Prosecco Superiore DOCG is produced. The aim is to establish, on the basis of some parameters (tourist expenditure and business hospitality) and in comparison with the other wine tourism models in literature, which stage of the lifecycle it is in, and its expressed and unexpressed potentials.

The paper is organized as follows. The second section compares some models of wine tourism at world level with the model of wine tourism taken as benchmark. The third part introduces the case study. The fourth part reports the research and data gathering methodology. The fifth section presents the results and last one the conclusions.

2. The development of wine tourism at international level: a comparison of some international models

From an analysis of the literature, a dominant wine tourism model exists, which takes Australia as reference. In fact, wine tourism supply in Australia is plentiful and attentive to the quality of the service. There is also a network of relationships between the wineries, tourist authorities and government agencies, which creates a strong synergy and makes the territory attractive (Boatto and Gennari, 2011). The importance of employee training and the quality of the service offered to the wine tourist are fundamental, as emerged in another study, which involved the visitors to a sample of wineries in California (Olsen and Thach, 2008). A positive

experience in the tasting room of the wineries is also fundamental in gaining consumer trust (Nowak et al., 2006)

Italian wine tourism, also because of the structural characteristics of the wineries, which still have an average-low reception capacity if compared with those in Argentina, which have an average of 10,000 visitors per year (Boatto and Gennari, 2011), emerges as a situation with potentials that still have to be developed. An example of this is the territory of the Langhe and Roero in Piedmont, where, despite the existence of an active network of organizations in support of wine tourism, there is still no economic support from the State (Castellani et al., 2011). Similar problems have been observed in the case of the *Strade del Vino della Campania*, which still require structural development and a qualitative evolution of the supply (Cembalo et al., 2011).

The development of wine tourism was studied by Dodd and Beverland (2001), who analyzed the different life cycles, identifying five stages: winery establishment, winery recognition, regional prominence, maturity, decline. In the first stage, the tourism is defined as ‘rural’; there are few reception facilities, wineries are not well known and have a small production, and networks are scarce or do not exist. In the second stage ‘rural tourism’ is referred to, with basic reception facilities, a network of relations that is still being developed, while the strategy is to focus on quality. In the recognition stage, there is cooperation between public agencies and private companies, high production levels, and renown at both national and international level. In the stage of maturity, the wine tourism is enlivened by festivals and special events and there are no changes at a level of accommodation facilities, nor of networks between companies and institutional bodies. In that of decline, lastly, there is a trend toward the closure of some structures, a lack of cooperation, an

availability in the company sales point only of excess production, and a decreasing production level. It follows that there is the need to consider the different situations in a territory case by case, because neighboring wineries may often be at different stages of the lifecycle.

3. The case study: wine tourism in the Conegliano Valdobbiadene DOCG area

During the 20th century, some research works dealt with tourism in the Conegliano Valdobbiadene area (Cosmo, 1938; Merlo and Favaretti, 1976; Schiratti, 1968), and because of its growing success, they have been continued in the new millennium (Berna et al., 2011; Boatto et al., 2006). Recent studies have focused on the importance of the connection between the beauty of the landscape and quality of Prosecco Superiore DOCG (Mauracher, 2006; Merlo and Favaretti, 1976; Tempesta et al., 2010; Mastrobuoni et al., 2012; Mauracher et al., 2013). Other research efforts are addressed toward the selection of a high quality tourism supply to meet new national and international demand.

In the area of Conegliano Valdobbiadene,¹ Prosecco Superiore DOCG has a leading role in the development of wine tourism (Boatto et al., 2006).

In this landscape, which has been inserted in the Italian *Tentative List* of nominations for *UNESCO World Heritage* for the beauty of its vineyards, a successful wine system model has been developed, specialized in producing quality sparkling wines. In this area, Prosecco Superiore DOCG, economic sustainability and landscape preservation, on the one hand, and the professional skills of the denomination's companies on the other, have exercised an important role in promoting the identity of the wine system model in Italy and abroad (Boatto and Barisan, 2012). With this background, wine tourism plays a leading role in transmitting the territory's values and strengthens the relation with 'local' and 'international' demand.

The territory boasts a wine-growing and producing tradition by now well-known all over the world: dating back to 1969, in 2012 there are 3068 denomination wine-growers and 437 wine producers. Regarding wine-making facilities, there are 168 sparkling wine companies. More than 5000 people work in the wine-producing sector, of whom over 250 are oenologists. During 2012, the production of Conegliano Valdobbiadene DOCG reached 69.85 million bottles for a value of 450 million euros. Its success on the markets has been accompanied by a significant growth in exports, which have reached 27.9 million bottles in 2011, equal to +132% over 2003 (Boatto and Barisan, 2012).

Wine tourism in the Conegliano Valdobbiadene DOCG area has seen a remarkable expansion during the last years. Both supply of and demand for wine tourism products have risen, in conjunction with an increase in agritourism services and Bed & Breakfast, together with the creation of sales points and wine tasting rooms in the wineries.

A differentiated tourism supply exists in the Conegliano Valdobbiadene area: in the Valdobbiadene zone, the type of tourism may be defined as 'rural', with a large number of agritourism establishments and Bed & Breakfast, whereas there are more hotels in the town of Conegliano.

Wine tourism in the area has also evolved thanks to the growing success of a competitive wine that is now one of the most important international sparkling wines, because of its sensory features, freshness and low grade of alcohol (Galletto and Bianchin, 2009).

With reference to wine tourism flows, the number of visitors has grown, from over 151,000 in 2008 to over 242,000 in 2011, with a growth rate of 60.3%. Incoming flow growth is accompanied by an increase in total expenditure, which reached, in 2011, an estimated value of 15.01 million euros, +24.6% over 2008 (Fig. 1).

4. The methodology used

4.1. The research application

Based on the dominant model of wine tourism discussed above, research was set up to verify the development stages of the Conegliano Valdobbiadene DOCG area.

In particular it was attempted to reveal the development stage of wine tourism in the area. With respect to which drivers does it differ from (1) the dominant wine tourism model?, (2) other international wine tourism models? (3) What are the realized and unrealized wine tourism potentials with respect to the dominant model?

4.2. Research design

The research design was developed based on the existing literature and the knowledge of the wine tourism situation gained over many years of research conducted by the Economic Observatory² of Conegliano Valdobbiadene DOCG (Boatto and Barisan, 2012; Meneghello and Manente, 2012). A literature search was done (see Appendix) in order to obtain the most appropriate variables and evaluate the development of wine tourism. Based on this general information, the specific factors were selected with the aim of gauging the development stage of wine tourism in the Conegliano Valdobbiadene area.

Adopting this approach, an ad hoc questionnaire was drawn up, which was tested on the local companies and subsequently improved.

Following an approach already described in the literature (Castellani et al., 2011; Galletto and Galletto, 2010), the

¹Conegliano Valdobbiadene DOCG area comprises 15 municipalities: Valdobbiadene, Conegliano, Vidor, Farra di Soligo, Pieve di Soligo, Miane, Follina, Cison di Valmarino, Tarzo, Refrontolo, Susegana, Colle Umberto, San Vendemiano, San Pietro di Feletto, Vittorio Veneto.

²The Economic Observatory of Prosecco is a partnership between the C.I.R. V.E. (Interdepartmental Research Centre for Viticulture and Oenology) and Tutelary Consortium of 'Conegliano Valdobbiadene – Prosecco' DOCG. It comprises a scientific committee, a core management team and a research group and staff. Since 2003, the Economic Observatory of Prosecco have made a contribution to research development on Prosecco wine economy and marketing. It enables an integrated information to official statistical sources regarding the technical and commercial production of Prosecco wine.

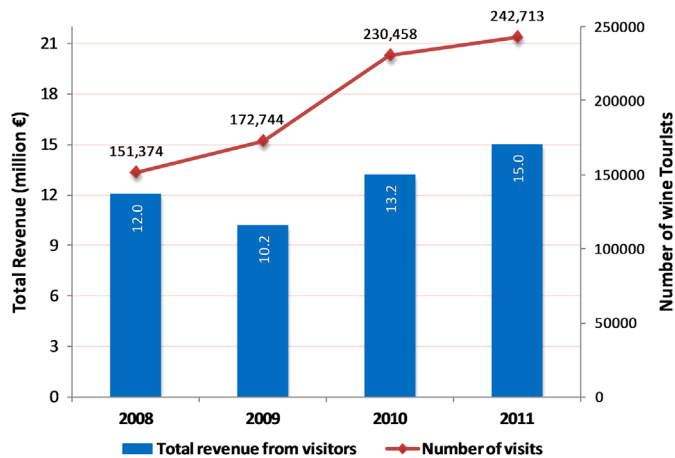


Fig. 1. Conegliano Valdobbiadene DOCG: evolution of visitor numbers and total expenditure at sparkling wine companies, 2008–2011.

Source: our calculations on C.I.R.V.E. Database (2009–2012).

investigated aspects, by means of the questionnaire submitted to the wineries, regarded questions on the demand and supply side.

On the supply side, the drivers concerned the measurement of five key components: product portfolio (number of bottles commercialized per type and supply mix); scale (total bottles of Prosecco commercialized); benefits of the landscape (presence of the viticulture farm, hectares of vineyard and land in the DOCG area); structure and quality of the welcome (dichotomous variables); impact of the main wine tourism events organized in the area on the company performances (level of agreement expressed on a standard 5-point Likert scale).

Five key factors were also considered on the demand side: type of visitors and profile of the wine tourist (number of visitors, percentages of origin, number of nights); motivations for the winery visit (dichotomous variables); expenditure on wine (euros per winery, number of bottles purchased at the sales point, average prices per wine type); seasonality of the visits (percentage of visitors per four-month period); trend of the visits (ordinal variable: increasing, stable, decreasing).

The questionnaire was therefore submitted to the owner of the winery or the marketing manager to better understand the situation and their perception of the trend of wine tourism in the area.

Taking into account these interpretative elements and based on what was deduced by Dodd and Beverland (2011), the wine tourism model of Conegliano Valdobbiadene was analyzed through the ‘lens of the development stage’. Two interpretative keys were taken into consideration for this: (a) wine tourism expenditure and (b) supply types. These were selected as they have a significant impact both on the development stage of a wine tourism area (demand side), and on the individual companies or company clusters (supply side).

According to the literature, tourist expenditure and arrivals are the most common measures of tourist demand (Chironi and Ingrassia, 2010; Crouch, 1994; Li et al., 2005; Lim, 1997; Witt and Witt, 1995). Income and prices have particularly affected the flows of international demand. Studies about explicative variables have most frequently taken as determinant factors for wine expenditure: income, relative prices, costs, exchange rates and other variables considered significant

to the objectives of the evaluation (Agarwal and Yochum, 1999; Downward and Lumsdon, 2000, 2003; Song et al., 2010; Brida and Scuderi, 2012).

As confirmed by Castellani et al. (2011), a relationship exists between average expenditure per purchaser and development stage of the wine tourism. Carmichael (2005) states that the effect of the expenditure on wine provides a definite contribution to the development and economic sustainability of the wineries in Ontario (equal to 70–80% of the sales). These results are confirmed in the Conegliano Valdobbiadene DOCG area, where the small companies (63% of cases) obtain the largest share of their volume of business from the winery sales point (40%), and the larger wineries that are better organized in welcoming tourists register a significantly higher level of prices than the medium-small wineries (Boatto and Barisan, 2012).

On the supply side, the clusters are significant competitive forces in the development of tourism in general and wine tourism (i.e. ‘California Wine Cluster’) (Porter, 1998). Porter et al. (2004) suggest that comparative studies on the clusters conducted in rural ambits can strengthen the understanding of the drivers underlying development. These factors involve the territorial and economic complementarity of the supply types of the wine tourism clusters.

In the light of the above considerations, the analytical process was split into two stages, adopting two multivariate analysis techniques: (a) multiple linear regression and (b) cluster analysis. These were used to explain the determinants of tourist expenditure and to characterize the types of company approach to wine tourism.

In the multiple linear regression analysis the stepwise method was used to select the explicative variables of the model. This approach allows the number of variables initially introduced in the model to be reduced, maintaining only those that have had a statistically relevant effect. The second issue is addressed by means of cluster analysis, using k-means clustering algorithm.

4.3. The sample

The study was conducted on a representative sample of 130 Prosecco wineries belonging to the Tutelary Consortium of Conegliano Valdobbiadene DOCG (78.3% of the total). The study sample consists of wineries that include direct sales of the wine to the public. The investigation was conducted with reference to 2010 year.

Other characteristics of the sample were obtained from the annual report produced by C.I.R.V.E., relating to the period 2008–2011, regarding the trend of some indicators of the structure and quality of the wine tourism welcome in the district (Boatto and Barisan, 2012). The wine tourism situation includes: (i) small wineries (equal to 62.3% of cases); (ii) medium-sized wineries (16.4%); (iii) large wineries (7.4%) and (iv) very large wineries (13.9%).³

³Small wineries (less than 150,000 bottles sold); (ii) medium-sized wineries (150,000–500,000); (iii) large wineries (500,001–1 million bottles); and (iv) very large wineries (more than 1 million bottles).

The sample included 73.4% of wineries with an on-site sales point (+22.8% on a four-year comparison) and 65.3% with a tasting room (+13.6% compared to 2008) (Table 2). The number of wineries which state that their staff includes a client services manager is slightly lower, even if it is a role that companies increasingly decide to introduce (+15.4% compared to 2008).

Regarding the knowledge of foreign languages by the assigned employees (Table 3): (a) English is the most widespread language: 70.5% of wineries state that they have English speaking staff (with a strong growth of 22% compared to 2008); (b) 34.6% of wineries have staff who can speak German (the share has increased by 7.3% on a four-year comparison); and (c) 16.4% of wineries have staff speaking foreign languages other than English and German (+3.7%, mainly French and Spanish). In particular, if on the one hand, the opening of the winery at 8.00 a.m. has decreased from 75% in 2008 to 57.2% in 2011, on the other, a closing time between 6:00 p.m. and 8:00 p.m. has expanded by +7.3% (reaching 73.3% in 2011). Moreover, a weekly timetable that starts on Monday has expanded from 76.7% in 2008 to 90.8% in 2011, indicating an extension to Saturday and Sunday, representing +9.3% over the four-year period (reaching 72% of cases in 2011).

Since 2008, the number of wineries with fewer than 200 visitors has decreased (31% in 2011, 43.5% in 2008), while those which are able to attract more than 200 visitors have increased (62% versus 47.1% in 2008) (Fig. 2).

5. Results and discussion

5.1. Drivers of wine expenditure

A series of multiple linear regression models were used to verify the determinants of tourist expenditure. The independent variables tested in these models represent the potential 'driving forces' from the wine tourism demand side. They are: number of visitors per winery; origin of the visitors (Veneto, Italy, abroad); number of nights; motivations for the winery visit (guided tour, purchase of wine, etc.); bottles purchased at the sales point (number); product portfolio (types of Prosecco DOCG and DOC wines); average prices per product type (DOCG and DOC); seasonality of the visits (percentage of visitors per four-month period); trend of the visits (increasing, stable, decreasing); size of the winery (total bottles of Prosecco commercialized); attractiveness of the landscape (presence of the viticulture farm, hectares of vineyard and land in the DOCG area); structure and quality of the welcome (dichotomous variables); impact of the main wine tourism events organized locally on the company performances (*Vino in Villa*, *Vinitaly*, *Primavera del Prosecco*, etc.).

Among the functional forms examined, the linear one results as being the most appropriate in explaining wine expenditure. The exclusion of the intercept, whose effect was not relevant (p -value=0.139), has allowed the adjustment's goodness of fit to the model to be further improved (increase of R^2 adj from 0.85 to 0.87). With the procedure of gradual removal of

Table 2

Presence of services in wineries, 2008–2011.

Source: our calculations on C.I.R.V.E. Database, 2009–2012.

Year	Sales point in winery	Wine Tasting room	Welcome service manager
2008	50.6%	51.7%	46.5%
2009	63.6%	52.6%	45.7%
2010	65.3%	58.3%	57.3%
2011	73.4%	65.3%	61.9%
Growth (%) 2008–2011	+22.8%	+13.6%	+15.4%

Table 3

Foreign languages knowledge, 2008–2011.

Source: our calculations on C.I.R.V.E. Database, 2009–2012.

Year	German	English	Other languages
2008	27.3%	48.8%	17.4%
2009	30.1%	49.7%	12.7%
2010	30.5%	63.5%	16.4%
2011	34.6%	70.5%	20.8%
Growth (%) 2008–2011	+7.3%	+21.7%	+3.4%

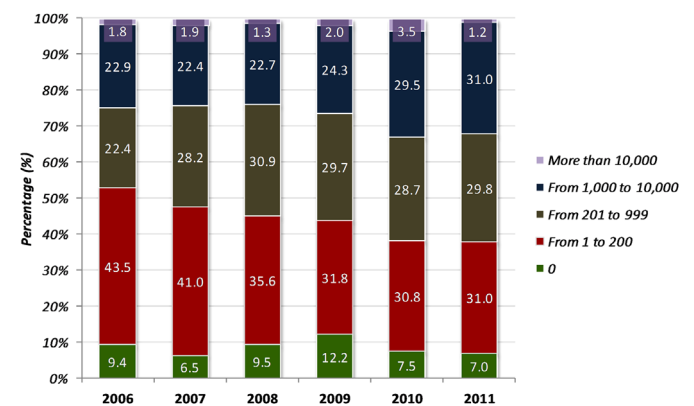


Fig. 2. Distribution of wineries per number of visitors, 2006–2011.

Source: our calculations on C.I.R.V.E. Database (2009–2012).

non-significant variables, the model's explicative power was not substantially altered.

The results in Table 4 show that explicative variables are consistent with the model, suggesting that they have a statistically significant effect on the wine tourism expenditure.

As expected, the most important determinant of the total expenditure is formed by visitor numbers, while the total vineyard area and Prosecco products portfolio contribute less in predicting visitor expenditure. On the other hand, coefficients of the seasonality of company visits (during the period May–August) suggest a negative effect on the dependent variable. In particular, it is interesting to note how with the increasing of visitor numbers by one unit, expenditure increases, on average, by 41 euros. Such a value of wine tourism expenditure is reflected in surveys conducted in other

wine tourism sectors in Treviso (Cristofanon and Galletto, 2010; Galletto and Galletto, 2010). In the case of bottlers, the fact of owning a farm positively affects the company income by almost 2300 euros per additional hectare. This estimate, which is related to the grape production, might also be explained by the surplus value bestowed on the final consumer by means of an individual company's contribution to the common environmental-landscape heritage of the Conegliano Valdobbiadene area. The immersion of the wine tourist in the territory and the reception facilities (in terms of accommodation) yield a positive effect on the 'local' wine tourist and on the 'international' one.

In this area, wine tourism expenditure gains advantage from the size of the companies' product mix. However, there is a negative effect of visitor flows during the period May–August: in fact, with a 1% increase of wine tourist flows in this period, the amount of expenditure per company is reduced by over 1400 euros. It is likely that, in this period, the wine tourist is

less willing to spend compared to other four-month periods of the year (more holiday-like with purchase targets other than wine).

From the results it emerges that not only the number of visitors is an important indicator for the propensity to wine tourism, but also a broad products portfolio.

5.2. Drivers that characterize the different types of wine tourism supply

Cluster analysis has been performed by progressively increasing groups from 3 to 6. The best definition for these clusters has been obtained with analysis in 5 groups.

In this way a group has been identified, number 3, which turns out to be very different from the others on the basis of a high number of variables (Table 5).

The 18 variables used in the cluster analysis have allowed evaluation of the aptitude to wine tourism activity by the 100 companies that have been identified by the analysis.

There are five types:

Type 1. Companies that sell Sparkling Prosecco DOCG mainly by direct sales (62.3% of total), and that welcome mainly wine tourists coming from the Region (58.5%), while foreigners represent just 9.4% of the total. The average expenditure on wine is quite high (111 euros per person) and takes place mainly during the first part of the year (48.5% between January and May). These companies assign high importance to events that take place in the surroundings, such as the *Primavera del Prosecco* (scoring 4.23 out of 5), while

Table 4
Results of the regression model, 2010.

Total wine expenditure	Coefficients	$P > t $	
Visitor numbers	41	0.000	***
Total area DOCG	2,274	0.000	***
Prosecco wine portfolio	6,120	0.003	**
Seasonality of winery visits	−1,423	0.002	**
R^2 adj		0.87	

Statistical significance of 0.1% and 5% is indicated by ***, **, respectively.

Table 5
Cluster analysis: average values for 18 variables; results of analysis of variance (F and level of significance), 2010.

Variables	Clusters						
	1	2	3	4	5	F	Sign.
	Percentage						
	13%	10%	19%	20%	38%	Average values in final clusters	
Veneto visitors (%)	58.46	50.00	15.21	43.55	55.29	13.65	0.000
Foreign visitors (%)	9.38	21.80	52.57	25.97	16.53	20.30	0.000
Average expenditure per visitor and purchaser	111.15	190.50	63.79	34.25	56.34	67.46	0.000
May–August (%)	24.97	27.84	57.76	33.94	33.50	13.87	0.000
September–December (%) events:	26.54	36.83	25.70	27.38	32.36	2.69	0.036
Vino in Villa	2.923	2.700	3.211	2.800	3.158	0.454	0.769
Vinitaly	2.231	3.400	3.895	3.200	3.711	2.905	0.026
Primavera del Prosecco	4.231	3.200	3.158	3.650	3.289	2.274	0.067
Cantine Aperte	2.846	2.800	3.000	2.650	3.053	0.275	0.893
Prosecco Wine Route	3.308	3.400	3.053	3.200	3.395	0.337	0.852
Sporting events	2.769	2.700	2.579	2.500	2.711	0.154	0.961
Sparkling DOCG wine sold through direct sales on the total of Italian channels (%)	62.31	28.00	6.54	86.60	10.59	100.30	0.000
Sales points or wine bar	0.769	0.500	0.895	0.750	0.868	2.119	0.084
Tasting room	0.615	0.600	1.000	0.600	0.737	2.779	0.031
Welcome service manager	0.692	0.800	0.632	0.600	0.789	0.816	0.518
German spoken	0.231	0.600	0.316	0.350	0.395	0.919	0.456
English spoken	0.769	0.700	0.947	0.650	0.816	1.482	0.214
Other languages spoken	0.077	0.400	0.211	0.050	0.316	2.306	0.064

they do not seem to be particularly interested in wider echo events, such as *Vinitaly* (scoring 2.23 out of 5).

Type 2. Companies whose average expenditure per person for purchasing wine is the highest (190 euros). The major rate of arrivals is in autumn (36.8% of cases), 50% of whom are Veneto tourists, with a moderate component of foreigners (21.8%). Actually, this is the type of company in which the main language spoken is German (60%) and languages other than those mainly known (70%), while a high percentage speaks English (70%). Such wineries use well-trained professionals and assign an important role to the presence of the Prosecco Wine Route (scoring 3.4 on 5).

Type 3. A quite specific cluster, consisting of companies that have the major percentage of foreign wine tourists (52.6%) and lower percentage of local tourists (15.2%), with an expenditure for purchasing wine that stands at average values (63.8 euros). Arrivals are concentrated in the summertime, for 57.7% of the total, showing an aptitude of these companies to intensive wine tourism in the strict sense of the term. The opening to foreign markets is confirmed by a considerable importance assigned to an international event such as *Vinitaly*, while direct sales, in this specific company group, cover just 6.54% of the total. Nonetheless, the attitude to wine tourism activity is supported by the presence of a tasting room in all cases, of a sales point or wine bar in 89%, and almost 100% speaking English.

Type 4. Companies with less aptitude for wine tourism. Despite a moderate share of foreign visitors (a quarter of the total), all the elements that favor wine tourism such as the presence of a tasting room, of a welcome services manager and foreign languages spoken, are less reported than in other clusters. These companies are distinguished by a major share of Sparkling Prosecco DOCG sold through direct sales (86.6%), connected with a lower average expenditure per purchaser (only 34 euros). There is also a low opinion about events that might attract tourists.

Type 5. This is the most numerous group of companies (almost 2/5) that are distinguished from the others by a distribution of arrivals in different periods of the year. As for type 1, a high percentage of tourists come from the Veneto (55.3%), while the share of foreign visitors is relatively lower (16.5%). Per person expenditure is mid-level for wine purchasing, at around 56 euros, while the percentage of direct sales is just 10.6% of the total.

5.3. Development stage of the wine tourism

Analysis of the determinants of wine expenditure reveals four factors that have an impact on the performances of wine tourism in the Conegliano Valdobbiadene area. These confirm a connection with the development stage and delineate a profile of the realized and unrealized potential. In particular: the role of the number of visitors can be ascribed to a stage of maturity in the development of wine tourism (see [Dodd and Beverland, 2001](#)). The positive effect of the products portfolio on wine expenditure places the area in the first two stages of the wine tourism lifecycle, in relation to the importance of the

product and its qualities in attracting the visitor. For the vineyard owner in the DOCG area, a positive effect on the wine expenditure appears to be associated to local and international recognition of the landscape value of the area (*regional prominence*). This therefore constitutes a strategic asset in the development of the international competitiveness of wine tourism in the area (Type 3). Lastly, the negative effect of seasonality on tourist expenditure, relative to summertime, denotes development potential still unrealized both in respect to the regional wine tourism of the Veneto and with reference to the dominant model.

Interesting elements emerge from the cluster analysis, which depict an extremely varied situation that differs from the international models. Indeed, even if 13% of the wineries (Type 1) may be classified in the first or second stage of the wine tourism lifecycle, they present some typical elements of the stage of maturity, which lead to the hypothesizing of future developments, such as high per capita expenditure and participation in events with international significance, like *Vinitaly*. Another group (Type 3) can be inserted in the stage of maturity, despite having a low percentage of direct sales. Type 4, which groups the wineries with less aptitude for wine tourism, nonetheless manages to dispose of a high percentage of product through direct sales, so this group can be inserted in the first stage of the lifecycle.

6. Conclusions

Wine tourism in the area of Conegliano Valdobbiadene, with the exception of the adverse trend in the last period, connected to the global economic situation, is characterized by a growing trend in arrivals, number of nights and in reception supply, with a significant increase in recent years. The strengths of this phenomenon rely on the richness of historical, natural and artistic attractions as well as the proximity to tourist attractions known worldwide, such as Venice and the Dolomites, and the presence of easily accessible airports.

Together with wine tourism, the so-called 'territory and cultural-landscape tourism' has also grown, linked to the revival of environment, traditions, food and wine. This is a quality tourism, that differs from mass tourism because it is not supported by any appropriate network of facilities required by the latter, also because of the landscape, consisting of a hilly area in which narrow roads wind, often tortuously, between hamlets and villages. If this aspect might be an obstacle to the diffusion of wine tourism in the Prosecco Superiore DOCG area, it is also a strength, because it represents a potential that has only recently begun to be fully explored. It is therefore possible to speak of a development stage for Prosecco Superiore DOCG wine tourism.

With the increasing visitors' flows, performances are improving on the welcome front, with a higher number of companies that have an adjoining sales point, a tasting room and have hired a welcome services manager.

Analysis of a representative sample of companies in the Conegliano Valdobbiadene area has permitted the importance of some main wine tourism components to be detected. In particular, it was found that the most important determinants

Table A

Literature review – driving factors of wine tourism in Conegliano Valdobbiadene DOCG (CV-DOCG).

	Factors	References
(A) Drivers of the supply		
Company portfolio of Prosecco wines, sales in volume, product quality	Prosecco Superiore DOCG; semi-sparkling DOCG; Superiore di Cartizze DOCG, semi-sparkling DOC; incidence of direct sales on total sales (%)	Boatto and Barisan (2012), Carmichael (2005), Telfer (2001)
Production scale CV-DOCG	Small wineries (less than 150,000 bottles sold), average-sized wineries (150,001-500,000 bottles), large wineries (500,001-1 million bottles), very large wineries (more than 1 million bottles)	Boatto and Barisan (2012)
Landscape attraction CV-DOCG	Presence of a vine firm, vineyard lands in DOCG area, prices, landscape quality	Tempesta et al. (2010), Mastrobuoni et al., 2012, Getz et al. (1999), Hall et al. (2000), Peters (1997)
Reception facilities and quality	Presence wine shop, tasting room, presence of catering/accommodation, presence of a welcome services manager, courtesy and expertise, languages spoken, winery opening days, opening hours, presence of wine tourist reception facilities	Boatto and Barisan (2012), Meneghello and Manente (2012), Olsen and Thach (2008)
Wine events CV-DOCG/ tourist attractions	<i>Vino in Villa</i> , <i>Vinitaly</i> , <i>Primavera Prosecco</i> , <i>Cantine Aperte</i> , <i>Strada del Vino CV-DOCG</i> , sporting events (e.g. Prosecco cycling classics, etc.), historical architectural, cultural, gastronomic attractions, etc.	Boatto and Barisan (2012), Meneghello and Manente (2012), Boatto and Gennari (2011)
(B) Drivers of the demand		
Types of visitors, profile of the wine tourist	Origin: Veneto, Italy, abroad Number of visitors per winery Age, sex, education level Presences/overnight stays per winery	Boatto and Barisan (2012), Dodd and Kolyesnikova (2005), Charters and Ali-Knight (2002), Getz et al. (1999), Getz and Brown (2006), Hall et al. (2000), Hall and Mitchell (2002), Mitchell et al. (2000), Peters (1997), Telfer (2001)
Motivations for the visit	Wine tasting and purchase, guided tour, overnight stay, refreshments, family vacation or with friends, source of information that led to the wine tourism experience (internet, word of mouth, newspapers, radio, etc.)	Boatto and Barisan (2012), Meneghello and Manente (2012), Hall and Mitchell (2000), Mitchell et al. (2000), Evans et al. (2008),
Average expenditure	Average expenditure on wine, bottles sold per product at the sales point, prices at the sales point	Boatto and Barisan (2012), Meneghello and Manente (2012)
Seasonality	January–April, May–August, September–December	Boatto and Barisan (2012), Meneghello and Manente (2012)
Trend of the visits	Increasing, stable, decreasing	Boatto and Barisan (2012), Meneghello and Manente (2012)

of wine tourism expenditure are visitor numbers and the total vineyard area and Prosecco wines portfolio.

Cluster analysis has also identified 5 company groups with different attitudes to wine tourism. Among these, one cluster presents peculiar features, because it intercepts the major percentage of foreign wine tourists and lower percentage of visitors coming from the Region, with arrivals focused on summertime. This type of company presents the greatest aptitude for wine tourism, since it provides adequate services for welcoming a demanding visitor.

The analysis confirms the presence of companies at different stages of development in terms of wine tourism, denoting characteristics that distinguish them from both the dominant Australian model and all the other types. It is a wine tourism with unrealized potential, in search of an identity, which may evolve positively thanks to the international success of the denomination.

Appendix. The auxiliary results

See appendix Table A1.

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