

6th UNWTO Global Conference on Wine Tourism

Alba, Italy
19-21 September 2022

ITALIAN WINE TOURISM

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ENIT- Italian National Tourism Board

Wine tourism in Italy

The 10 trends

1 Beyond the product: the territorial identity

2 Beyond environmental sustainability: The social sustainability

3 Living outdoor spaces

4 Nature bathing

5 A novel connection between urban and rural areas: the food and wine hub

6 A 360 Degree Hospitality

7 The new wine traveller

8 The pairings

9 The marketing evolution

10 Strategic planning



1. BEYOND THE PRODUCT: THE TERRITORIAL IDENTITY

Italian wine and its numbers



Number of certified wines¹

526 (408 POD, 118 PGI)

The highest number in Europe, +4 in the period 2011-2022



Wine production²

50 million hectolitres

First worldwide producer



Wine companies²

310,428



Organic vineyards³

19% of the total country area under vines

The highest percentage worldwide



Use of phytosanitary product in Italian agriculture⁴

-32%

Between 2011 and 2019, confirming it as the most sustainable in Europe



Total revenues of wine industry²

13 billion €



Area under vines²

674,030 hectares



Tons of CO₂ generated by Italian agriculture⁴

30 Million

Less than France, Germany and Spain

Data source: (1) Fondazione Qualivita (2022), data refers to September 2022. (2) ISMEA (2022), data refers to 2021. (3) ISMEA (2021), data refers to 2019. (4) Fondazione Symbola (2021).

Wine tourism in Italy



Visitors¹
14 million



Total revenue¹
2,5 billion €



United Nations
Educational, Scientific and
Cultural Organization

- 2 World Heritage Sites linked to food & wine
- 4 Intangible Cultural Heritage linked to food & wine
- 3 UNESCO creative cities of gastronomy
- The highest number in Europe²*

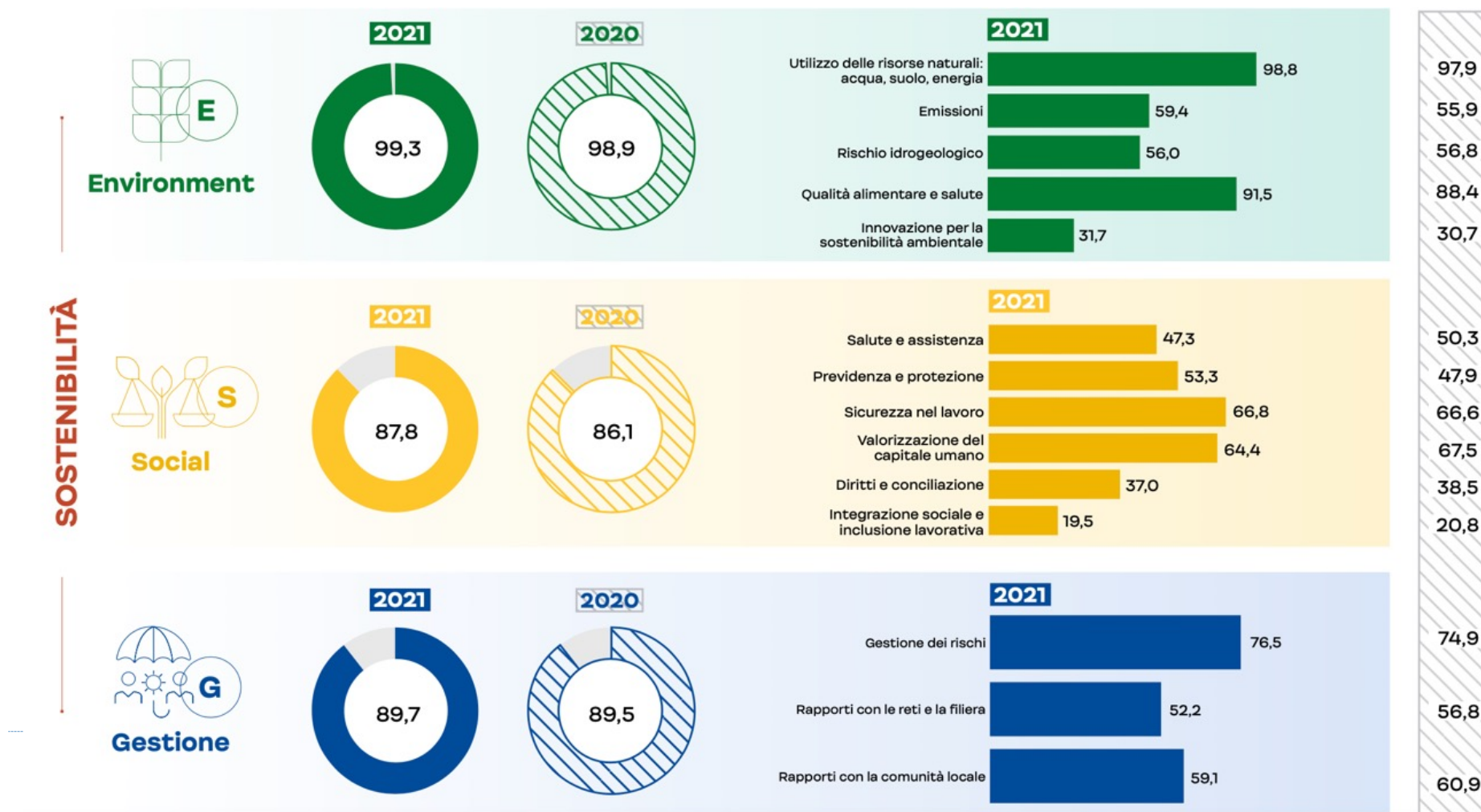


2 FAO Globally Important
Agricultural Heritage
Systems³



2. BEYOND ENVIRONMENTAL SUSTAINABILITY: THE SOCIAL SUSTAINABILITY

Italian farms' commitment to sustainability



Data source: (1) Reale Mutua and Confagricoltura (2022), survey conducted on a panel of 2,162 farms.



CONSORZIO DI TUTELA
BAROLO
BARBARESCO
ALBA LANGHE E DOGLIANI



I PAESAGGI
VITIVINICOLI DI
LANGHE ROERO
MONFERRATO
UNESCO WORLD HERITAGE SITE



ECOLOG

#LogisticaGreen



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Wine and... social
sustainability
ECOLOG project, Piedmont

Photo credits: ideawebtv.it

Logistica green

Sustainability drives travellers' choices

The social dimension

Willingness to visit production sites (e.g., farms, wineries) that adopt the following sustainability-related initiatives.

	 All Italian travellers	 Food & Wine motivated tourists
Ongoing projects and/or initiatives that help local community	71%	77%
The adoption of ethical policies regarding e.g., employees, farming methods	71%	76%
Ongoing projects and/or initiatives that help disadvantaged groups (including those from outside the local community)	66%	71%
Having the opportunity to live in the local community, spending a day with local producers (e.g., in the vineyards during the grape harvest, in the rice fields, etc.)	66%	71%

Data source: Garibaldi (2021), survey conducted on a representative panel of 1,000 Italian travellers. Note: Question based on a Likert scale (1=Strongly disagree; 5=Strongly agree). The table shows the % values of the answers with values of 4 and 5.

Wine pairs with... social sustainability

Slow wine coalition, Slow Food, Italy



Slow Food®
Slow Wine Coalition



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19-21 September 2022



Photo credits: slowfood.it

A COLLABORATIVE WINE NETWORK



3. LIVING OUTDOOR SPACES

Wine pairs with... bike

E-bike tour of “Vino Nobile” in Montepulciano, Tuscany

Willingness to use bike for a trip among local food and wine producers



All Italian travellers

36% (+18%)



Food & Wine motivated tourists

39% (+20%)



Data source: Garibaldi (2021).



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Wine pairs with... bike

Eroica Montalcino

Eroica through different countries

Nova Eroica California

Eroica California

Eroica Limburg

Eroica Hispania

Nova Eroica Switzerland

Eroica Germania

Eroica Japan

Eroica South Africa

Nova Eroica South Africa

Photo credits: eroica.cc

Wine pairs with... trekking

Wine trekking, Argiolas winery, Sardinia

Willingness to go trekking in the vineyards

All Italian travellers

46%



Food & Wine motivated tourists

53%



Data source: Garibaldi (2021). Photo credits: facebook.com/ArgiolasWinery

Wine pairs with... picnic

“Manifesto Città del Vino 2023”, Città del Vino

Willingness to do outdoor picnics, e.g., in the vineyards, olive groves, etc.



All Italian travellers

75%



Food & Wine motivated tourists

75%

Data source: Garibaldi (2021). Photo credits: cittadelvino.it




Wine pairs with... dinner

Dining in the vineyards, Querceto di Castellina, Tuscany

Willingness to have a dinner in the vineyards

All Italian travellers
62% 

Food & Wine motivated tourists
66% 

Data source: Garibaldi (2021). Photo credits: quercetodicastellina.com

4. NATURE BATHING

Wine pairs with... wellbeing Filodivino Wine Resort & Spa, Marche

Willingness to find wellness activities (e.g., treatments, spas) in the vineyards



All Italian travellers

51% (+5%)



Food & Wine motivated tourists

56% (+4%)



Wine pairs with... relaxation Wine yoga, Monte del frà winery Veneto

Willingness to do relaxation
activities like e.g., yoga
courses, etc.

All Italian travellers

46%



Food & Wine motivated tourists

53%



Data source: Garibaldi (2021). Photo credits: f montedelira.it

Wine pairs with... art courses

Water colour painting course in the vineyards, Barone Ricasoli, Tuscany

Willingness to do art courses in the vineyards



All Italian travellers

40%



Food & Wine motivated tourists

47%



5. A NOVEL CONNECTION BETWEEN URBAN AND RURAL AREAS: THE FOOD AND WINE HUB

Wine as ... a link to urban and rural

Urban vineyard “Villa della Regina”, Turin, Piedmont

Willingness to find food and wine hubs in the destination



All Italian travellers

60%



Food & Wine motivated tourists

66%

Data source: Garibaldi (2021). Photo credits: flawless.life



Wine as ... a link to urban and rural “Oro di Montalcino” museum, Tuscany

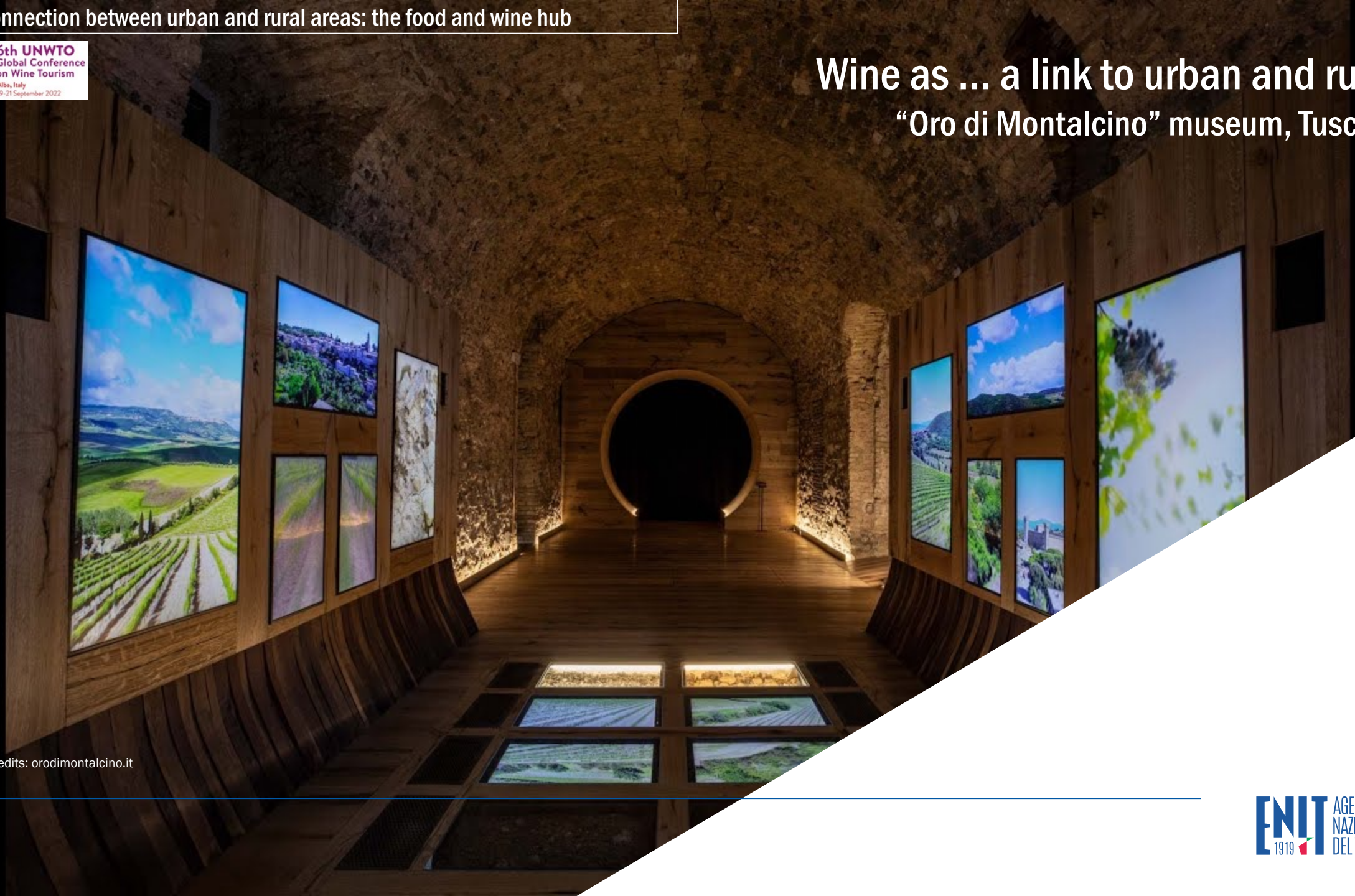


Photo credits: orodimontalcino.it

6. A 360 DEGREE HOSPITALITY

Wine pairs with... hotel accommodation

Masseria Amastuola Wine resort, Puglia

Willingness to stay in a food/wine/etc. themed hotels



All Italian travellers

48%

Real stay: 22% ($\Delta=27\%$)



Food & Wine motivated tourists

56%

Real stay: 32% ($\Delta= 24\%$)

Wine pairs with... glamping

Glamorous Camping, Strada del Barolo, Piedmont

Willingness to stay at a glamping sites



All Italian travellers

25%

Real stay: 12% ($\Delta = 13\%$)



Food & Wine motivated tourists

29%

Real stay: 17% ($\Delta = 13\%$)

Data source: Garibaldi (2021). Data data inside the parenthesis refers to the % difference with real stay during holidays. Photo credits: patatofriendly.com

Wine pairs with... gourmet food

Osteria di Guado al Tasso, Guado al Tasso wine estate, Tuscany

Willingness to have a lunch and/or dinner in a winery restaurant

All Italian travellers
68%



Food & Wine motivated tourists
72%



Data source: Garibaldi (2021). Photo credits: osteriadeltasso.com

7. THE NEW WINE TRAVELLER

Wine and Food tourism are...

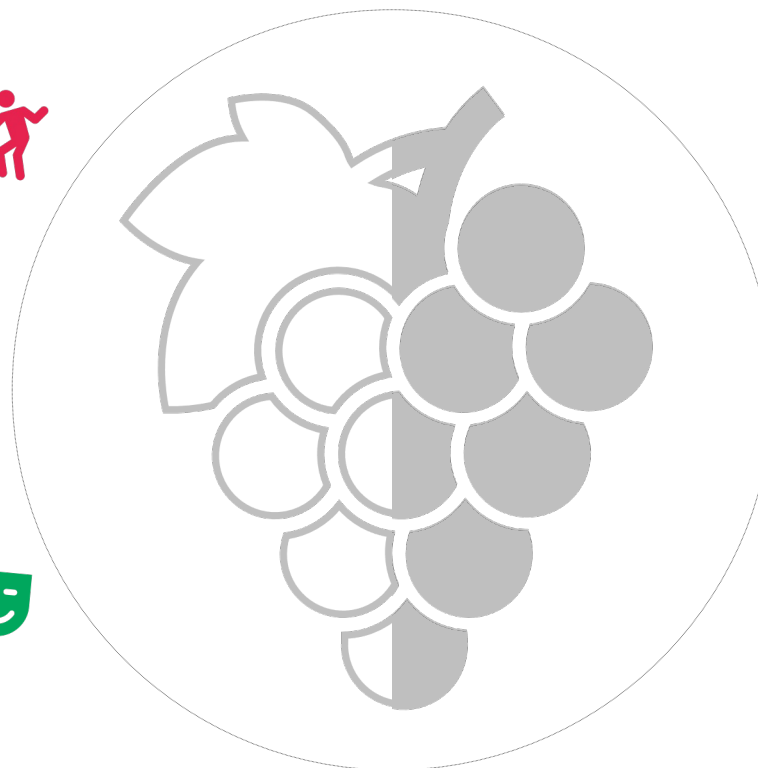
Experiential tourism practices

Emotionally involving



Cultural tourism practices

Being introduced to local cultural heritage through wine and food



Social practices

Sharing experiences and memories

The changing market: the new wine travellers

Generalists, Millennials, Women, Families... and Generation Z?



Photo credits: oggi.it



8. THE PAIRINGS

Wine pairs with... arts

Ceretto Winery, Piedmont

Willingness to attend events and/or proposals combining
gastronomy with arts



All Italian travellers

64%



Food & Wine motivated tourists

70%



Wine pairs with... design

Tenuta Castelbuono, Umbria



Photo credits: itrepubblica

Wine pairs with... land art

Cretto di Burri & Tenute Orestiadi, Sicily



Wine pairs with... design

Antinori nel Chianti Classico, Tuscany

Willingness to visit a modern designed winery



All Italian travellers

46% (+9%)



Food & Wine motivated tourists

53% (+2%)

Data source: Garibaldi (2021). Photo credits: viaggioff.it

Wine pairs with... history

Castello Banfi, Tuscany

Willingness to visit a winery located in a historical building



All Italian travellers

67% (+7%)



Food & Wine motivated tourists

72% (+3%)



Wine pairs with... history

Le Vie Angarano, Veneto



Photo credits: italybyus.com

Wine pairs with... family wineries

Cantina Foradori, Trentino South Tyrol

Willingness to visit family-run wineries in order to discover new, even if less renowned, productions



All Italian travellers

49% (+10%)



Food & Wine motivated tourists

58% (+8%)





Wine pairs with... archaeology

Diodoros winery in Valle dei Templi, Agrigento, Sicily



Photo credits: agrigentoweb.it

Wine pairs with... archaeology

Mastroberardino winery in Pompeii site, Campania



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Wine pairs with... historical trains

“TrEno” Langhe-Roero-Monferrato, Piedmont

TrEno

LANGHE - MONFERRATO - ROERO

Food and Wine Experience



Wine pairs with... music

Rocca di Frassinello, Tuscany

Willingness to attend events and/or proposals combining
gastronomy with music

All Italian travellers
62%



Food & Wine motivated tourists
66%



Data source: Garibaldi (2021). Photo credits: roccadifrassinello

Wine pairs with... religion

Abbazia di Novacella wine estate, South Tyrol





Wine pairs with... fashion

Il Borro Toscana, Tuscany

Photo credits: ilborro.it

Wine pairs with...
underwater
Bisson “The underwater
winery”, Liguria



Photo credits: dissapore.com/

Wine pairs with... business

Diego Pressenda, Piedmont

Willingness to visit a modern designed winery



All Italian travellers

47%



Food & Wine motivated tourists

56%



#livingitalian

Photo credits: ENIT 2022
Photo credits: planeta.it

Italian shopping

#livingitalian

Photo credits: ENIT (2022)



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Italian monument

#livingitalian

Photo credits: ENIT (2022).



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9. THE MARKETING EVOLUTION

Neuromarketing



Wine pairs with... cinema

“Love in the villa - Innamorarsi a Verona”, NETFLIX

*Love
in the
Villa*

Photo credits: winenews.it

NETFLIX

TOMMASINI®
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Ti consiglio un vino
bianco fruttato
e aromatico

Wine going digital
Alexa voice assistant “Vino Perfetto”



Wine tourism going digital

The metaverse experience “Enonutilus Wine Theatre”, Vanilla Innovations

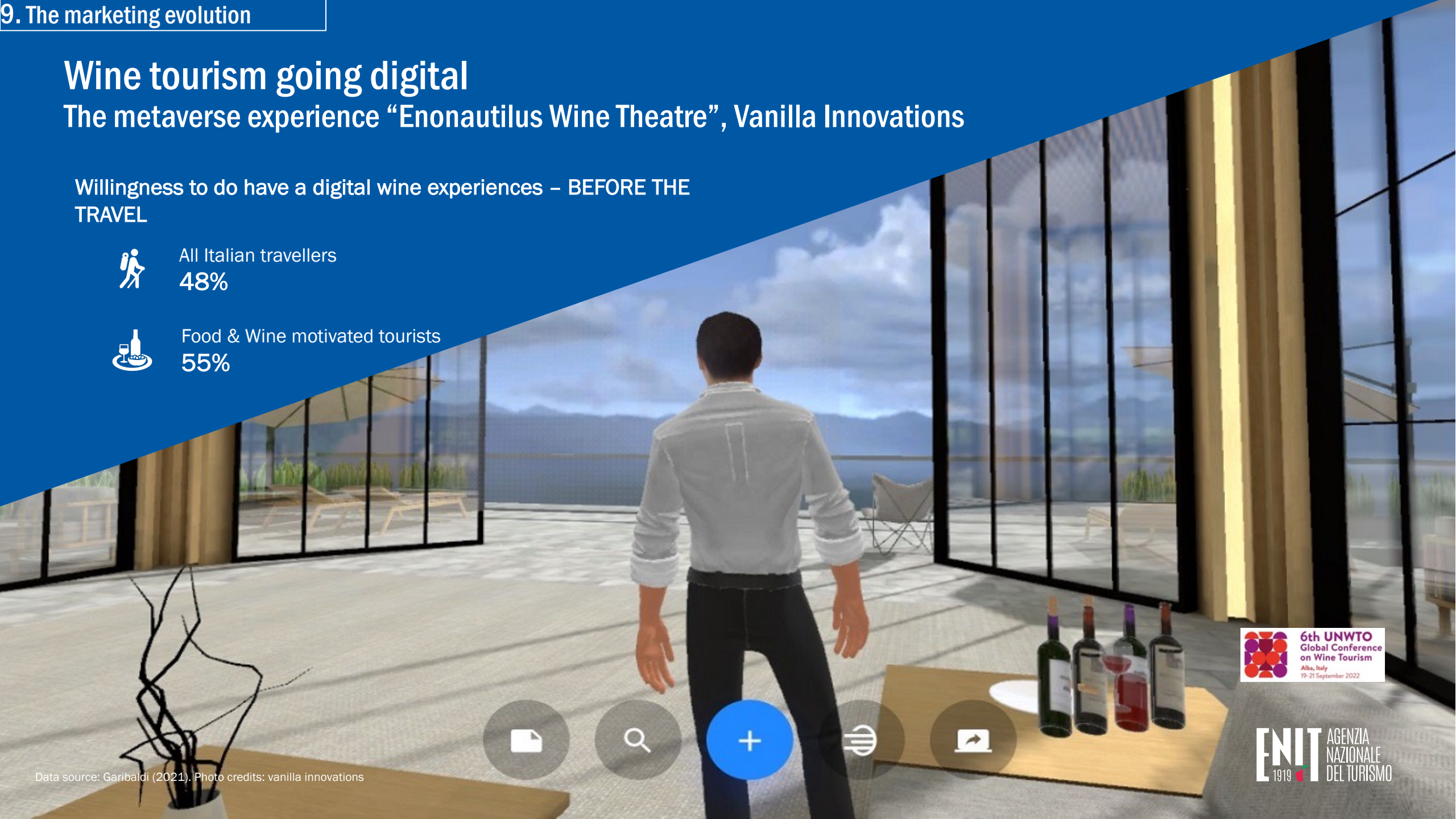
Willingness to do have a digital wine experiences – BEFORE THE TRAVEL



All Italian travellers
48%



Food & Wine motivated tourists
55%



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Wine tourism going digital

The metaverse virtual shop “Loft Italy”, Loft Italy



Photo credits: foodserviceweb



Wine going to comics “Cantine a fumetti”, Donne del Vino



LASCIA PERDERE,
POVERA CENERENTOLA!
I PRINCIPI HANNO GUSTI
RAFFINATI!

SE IL NOSTRO
VINO NON HA FAT-
TO COLPO, COME PO-
TREBBE MAI PIACER-
GLI IL TUO?

Photo credits:lanazione.it

Wine pairs with... gaming

From grape to the bottle", MAVV – Artmuseo dell'arte, del vino e della vite, Naples, Campania

Esegui in successione le fasi della
vinificazione! Controlla i risultati
del tuo lavoro cliccando su
'Degustazione'.



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Wine going digital... tastings

Willingness to do have a digital wine experiences – AFTER THE TRAVEL



All Italian travellers
50%



Food & Wine motivated tourists
57%

Data source: Garibaldi (2021); Photo credits: fruitecom.it

10. STRATEGIC PLANNING

The strategical framework

Increasing the capability of food and wine to generate value for tourism in the long term



Ambitions
(What to change to
get there)



System strategies
(What to achieve)



Operational directions
(What to do)

1. Preserving

- 1.1** Incentivizing investments for food and wine heritage preservation and enhancement
- 1.2** Supporting tourist valorisation of the food and wine heritage

2. Developing

- 2.1** Creating a supportive legislative and regulatory framework for food and wine-based tourism activities
- 2.2** Facilitating the emergence of attractions and services to enrich the tourists' experience
- 2.3** Empowering professional competences to ensure high-quality tourism experiences
- 2.4** Facilitating tourists' understanding and appreciation of the food and wine heritage
- 2.5** Adopting innovative and high-quality standards

3. Networking

- 3.1** Promoting active collaboration between public and private stakeholders from food/wine and tourism industries
- 3.2** Developing innovative and integrated tourism products centred on food and wine

4. Communicating & Promoting

- 4.1** Improving country's position in those Category Entry Points (CEPs) linked to food and wine travels
- 4.2** Enhance food and wine as effective travel motivators
- 4.3** Broadening the coverage of distribution and sales channels

Preserving old grocery selling bulk wines



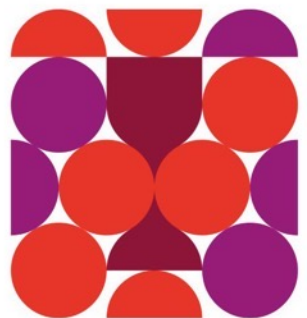
Photo credits: ilvinoinbottega.com

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Preserving Heroic Viticulture of “Cinque Terre”

Photo credits: winetourism.com



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**LOOKING FORWARD TO
WORK WITH YOU!**

Roberta Garibaldi
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