ITALIAN WINE TOURISM

Roberta Garibaldi
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 wines
526 (408 POD, 118 PGI)
The highest number in Europe, +4 in the period 2011-2022

Wine production
50 million hectolitres
First worldwide producer

Wine companies
310,428

Total revenues of wine industry
13 billion €

Area under vines
674,030 hectares

Organic vineyards
19% of the total country area under vines
The highest percentage worldwide

Tons of CO₂ generated by Italian agriculture
30 Million
Less than France, Germany and Spain

Use of phytosanitary product in Italian agriculture
-32%
Between 2011 and 2019, confirming it as the most sustainable in Europe

Wine tourism in Italy

Visitors
14 million

Total revenue
2.5 billion €

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 Europe

2 FAO Globally Important Agricultural Heritage Systems

Data sources: (1) Città del Vino (2020), data refers to 2019. (2) Garibaldi (2022), elaboration on UNESCO data. (3) Garibaldi (2022), elaboration on UNESCO data. (4) FAO, data refers to September 2022. Photo credits: winenews.it; UNESCO; FAO.
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.
2. Beyond environmental sustainability: The social sustainability

Wine and... social sustainability
ECOLOG project, Piedmont
### Sustainability drives travellers’ choices

#### The social dimension

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

<table>
<thead>
<tr>
<th>Initiative</th>
<th>All Italian travellers</th>
<th>Food &amp; Wine motivated tourists</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ongoing projects and/or initiatives that help local community</td>
<td>71%</td>
<td>77%</td>
</tr>
<tr>
<td>The adoption of ethical policies regarding e.g., employees, farming methods</td>
<td>71%</td>
<td>76%</td>
</tr>
<tr>
<td>Ongoing projects and/or initiatives that help disadvantaged groups</td>
<td>66%</td>
<td>71%</td>
</tr>
<tr>
<td>(including those from outside the local community)</td>
<td></td>
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<tr>
<td>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.)</td>
<td>66%</td>
<td>71%</td>
</tr>
</tbody>
</table>

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.
Beyond environmental sustainability: The social sustainability

Wine pairs with... social sustainability
Slow wine coalition, Slow Food, Italy
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).
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

<table>
<thead>
<tr>
<th></th>
<th>All Italian travellers</th>
<th>Food &amp; Wine motivated tourists</th>
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<tbody>
<tr>
<td></td>
<td>46%</td>
<td>53%</td>
</tr>
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</table>

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

All Italian travellers
51% (+5%)

Food & Wine motivated tourists
56% (+4%)

Data source: Garibaldi (2021). Photo credits: filodivino.it
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: fmontedelfra.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%

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

5. A novel connection between urban and rural areas: the food and wine hub
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% (Δ=27%)

Food & Wine motivated tourists

56%
Real stay: 32% (Δ= 24%)

Data source: Garibaldi (2021). Data inside the parenthesis refers to the % difference with real stay during holidays. Photo credits: teditour.com
Wine pairs with... glamping
Glamorous Camping, Strada del Barolo, Piedmont

Willingness to stay at a glamping sites

- **All Italian travellers**
  - 25%
  - Real stay: 12% (Δ = 13%)

- **Food & Wine motivated tourists**
  - 29%
  - Real stay: 17% (Δ = 13%)

Data source: Garibaldi (2021). 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

Social practices
- Sharing experiences and memories

Cultural tourism practices
- Being introduced to local cultural heritage through wine and food

The new wine traveller
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 combing gastronomy with arts

- All Italian travellers: 64%
- Food & Wine motivated tourists: 70%

Data source: Garibaldi (2021). Photo credits: ceretto.com
Wine pairs with... design
Tenuta Castelbuono, Umbria
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
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%)

Data source: Garibaldi (2021). Photo credits: tripadvisor.it
Wine pairs with... archaeology
Diodoros winery in Valle dei Templi, Agrigento, Sicily

Photo credits: agrigentoweb.it
8. The pairings

Wine pairs with... archaeology
Mastroberardino winery in Pompei site, Campania

Photo credits: agro24.it
Wine pairs with... historical trains
“TrEno” Langhe-Roero-Monferrato, Piedmont
8. The pairings

Wine pairs with... music

Rocca di Frassinello, Tuscany

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

<table>
<thead>
<tr>
<th>Category</th>
<th>Percentage</th>
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<tbody>
<tr>
<td>All Italian travellers</td>
<td>62%</td>
</tr>
<tr>
<td>Food &amp; Wine motivated tourists</td>
<td>66%</td>
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</table>

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
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%

Data source: Garibaldi (2021). Photo credits: diegopressenda.it
#livingitalian
Italian shopping

#livingitalian
Italian monument

#livingitalian
9. THE MARKETING EVOLUTION

Neuromarketing
Wine pairs with... cinema

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

Photo credits: winenews.it
Wine going digital
Alexa voice assistant “Vino Perfetto”

Ti consiglio un vino bianco fruttato e aromatico
Wine tourism going digital
The metaverse experience “Enonautilus Wine Theatre”, Vanilla Innovations

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

All Italian travellers
48%

Food & Wine motivated tourists
55%
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
Wine pairs with... gaming
From grape to the bottle”, MAVV – Artmuseo dell'arte, del vino e della vite, Naples, Campania
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
Preserving Heroic Viticulture of “Cinque Terre”
LOOKING FORWARD TO WORK WITH YOU!

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