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# **Status of Coopetition in Wine Tourism Research: What? Who? How?**

## **Abstract**

Coopetition plays a central role in the tourism and wine sector interplay, but there is a literature gap about the state-of-art on wine tourism coopetition. Our research aims to structure the knowledge status on wine tourism coopetition from the core research dimensions and the future trends indicated by the researchers. We answered four questions: What is the current coopetition research in wine tourism? Who are the prominent scholars? How are themes and authors correlated? What are the motivations and trends of the wine tourism coopetition? We conducted a bibliometric study using multiple techniques: Historiography, Correspondence Analysis, Thematic Relevance, and Development Matrix.

Additionally, we performed a Content analysis to identify the motivations for Coopetition. Key results showed four cluster themes on this topic: Wine segmentation studies, Tourism experience studies, Studies of sustainability of wine tourism, and new theories to study wine tourism. We synthesized the dimensions and motivations of Coopetition as context, process, and results. Theoretical and practical implications showed Coopetition as a mostly unintentional process in the wine industry related to territorial synergy, interdependence, complementarity, and strategic fit. It is a broad intersectoral interplay that covers many industries. However, wine tourism coopetition should become a planned strategy to improve outcomes.

**Keywords:** coopetition, wine tourism, research dimensions, trends, bibliometric analysis

## **1. Introduction**

Tourism coopetition and wine tourism are fields of study that grew independently, but scholars started combining these research topics a few years ago. For this reason, some authors are analyzing wine tourism coopetition studies to identify the gaps and discuss this dual perspective (Crick, 2018a; Salvado, 2017). Various industries focus on synergistic benefits through coopetition as a business strategy (Gernsheimer et al., 2021). Coopetition is the simultaneous cooperation and competition between rival firms to create a collective competitive advantage from a shared goal despite individual interests (Bengtsson & Kock, 1999). Wine tourism covers wine tasting to contact with the local gastronomy and visiting vineyards, wineries, wine festivals, or grape shows (Hall & Mitchell, 2007); the motivation of tourists to wine tasting is to search for new flavors and smells that reveal the region's terroir (Zamarreno-Aramendia et al., 2021). Developing wine tourism in the place where wine is produced, accompanied by gastronomy based on typical regional products, highlights the cultural legacy of the communities and the landscapes shaped by viticulture (Baird et al., 2018). The wine region attributes in tourism represent the prime tourism resource and motivation to attract visitors (Maracajá

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et al., 2022). Wine regions find synergies with the tourism sector. However, both industries must be worked with sustainability (Alonso & O'Neill, 2009). Collaborative strategies become a context for these two old industries (winery and tourism) to co-develop (Telfer, 2001), boosting cooperation networks.

Scholars have highlighted the tourism destination as a natural context of cooperation. Tourism is a suitable sector for studying cooperation behavior (Della Corte & Sciarelli, 2012). This assumption was amplified by Crick (2018b), who defends wine tourism as an ideal context for cooperation research since the settings used to test a theory can shape the direction of future research or yield counter-intuitive findings. Indeed, there is a difference. Emergent or intentional cooperation is a behavior; however, if it is planned, it becomes a strategy. Miná and Dagnino (2016) emphasized that cooperation has taken on a relevant area of strategic management, becoming a subfield that theorizes about multifaceted strategic relationships. In other words, it explores how organizations can work together and compete simultaneously. Tourism Cooperation is a dyadic behavior of cooperating and competing simultaneously between two or more players to develop the tourism destination as an integral product (Chim-Miki & Batista-Canino, 2017).

Cooperation has been studied for 25 years, but the last five years concentrated two-thirds of all articles on the theme (Gernsheimer et al., 2021). Scholars have proven several approaches in this cooperation research path; many others still need to be answered. Also, researchers provided the transference of knowledge across different sectors, such as tourism. Cooperation is comprehensive and strategic to any industry (Bouncken et al., 2015); thus, prior literature reviews broadly synthesized the state-of-art. For instance, the systematic literature review of Gernsheimer et al. (2021) provided core research dimensions and future trends of cooperation for researchers and practitioners; a bibliometric analysis of research articles published between 2010 and 2020 developed by Yadav et al. (2022) indicated the global developments in cooperation research; a theoretical review performed by Chim-Miki and Batista-Canino (2017) focused on tourism cooperation provided a research agenda; and, Della Corte (2018) focused on the literature review on cooperation and innovation.

Literature reviews are essential to synthesize the state-of-art and identify research gaps and emerging trends in the research field. For this reason, periodic literature reviews must update the state-of-the-art to contribute to building the cooperation paradigm. Also, literature reviews of sub-fields or sectors are welcome because of a gap in cooperation studies (Gernsheimer et al., 2021). Our investigation is a systematic literature review on cooperation with some differentials. Our study aims to link two industries (wine and tourism) where cooperation can play a central role, and research is still recent. We fill this thematic gap by structuring the developments of cooperation in wine tourism to understand its progress from the core research dimensions and future trends for researchers and practitioners.

Our research questions are: (RQ1) What is the current state of cooperation research in the wine tourism segment? (RQ2) Who are the prominent authors in this research area? (RQ3) How are wine tourism study themes and authors correlated? (RQ4) What are the dimensions of motivations and trends of cooperation in wine tourism research? We conducted two searches in the Web of Science (WoS) database to identify relevant papers, which resulted in 201 articles after the screening phase. We defined a set of criteria to identify articles that provide an overview of themes related to cooperation, representing the hybrid behavior between wineries and tourism.

We chose this thematic subfield due to its relevance to rural and regional development; the rural wine regions can promote tourism aligned with the sustainable use of endogenous resources and social inclusion (Andrade-Suarez & Caamano-Franco, 2020). Wine tourism increases tourism destinations' attractiveness and competitiveness, improving the residents' quality of life and the performance of firms (Scorrano et al., 2019). Our study contributes to an updated view of the cooperation research in wine tourism while indicating the trends and highlighting implications for theory development. Our findings suggest what gaps remain in this thematic subfield of tourism cooperation. Thus, it can be valuable to other scholars to build knowledge on wine tourism cooperation. Besides, it provides knowledge synthesis, which is always helpful for researchers.

For tourism practitioners, our study offers the drivers of coopection networks in wine tourism to indicate how managers can improve coopection outputs.

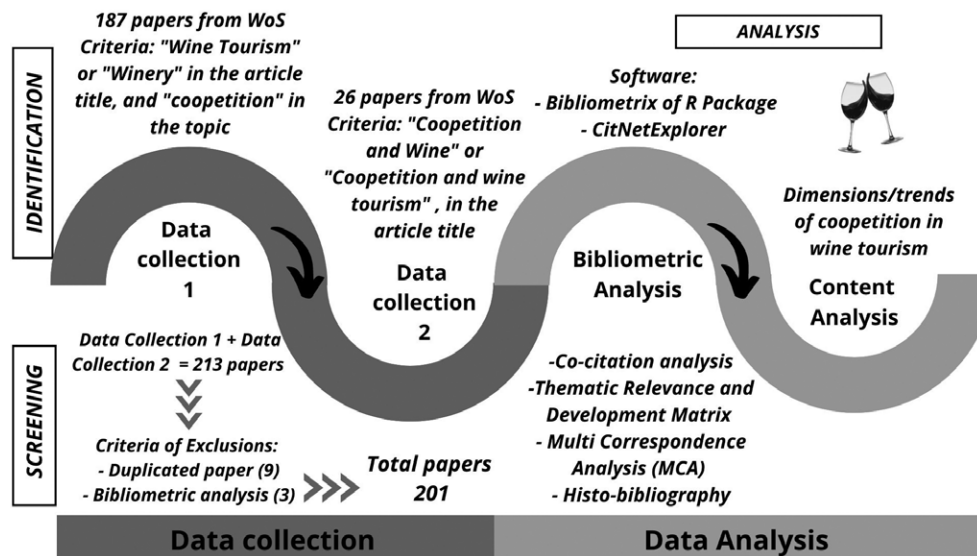
## 2. Methodology

According to Paré et al. (2015), conducting a Systematic Literature Review (SLR) means visiting the conceptual bases that support the study area in search of clarifications, consensus, divergences, and gaps. Bibliometric studies have become helpful tools for developing SLR. Its popularity among scholars is growing because the results of bibliometrics allow inferences about future research direction and provide an area overview (Cardoso de Santana et al., 2021; Bem Maracajá et al., 2021).

Our literature review has a narrower focus: coopection in wine tourism. However, we established criteria to be more inclusive and find relevant articles. For this, we did two searches in the Web of Science database. The first search used as criteria that the paper's title should contain the words 'wine tourism or winery' and 'coopection' should be in the article's topic (title, abstract, keyword). In the second search, the articles should have the words 'coopection and wine' or "coopection and wine tourism" in the topic. In this way, we amplified the search without losing our focus. According to these criteria, we captured 213 articles published in peer-reviewed journals between 1990 and 2022 in the Science Citation Index - SCI, Science Citation Index Expanded - SCIE, Social Science Citation Index (SSCI), Tourism Index (TI), and Wine Tourism Citation Index (WTCI) of Web of Science database. The search was on April 26/2022.

We performed a screening phase to eliminate the overlaps between the two searches, removing 12 duplicated articles and three literature reviews. The remaining 201 papers were analyzed using a multimethod and software synthesized in Figure 1. Our study is classified as a CAQDAS (Computer Assisted Qualitative Data Analysis), a term used to express different qualitative analyses supported by software (Sinkovics & Alfoldi, 2012) that generates a systematic and rigorous analysis of substantiated qualitative data with enhanced trustworthiness (Ang et al., 2016). Qualitative research, including bibliometric analysis, gained more popularity based on the richness of collected data and advancement in the study techniques assisted by software. Two software applications assisted our bibliometric analysis: CitNetExplorer and Bibliometrix, an R software package that performs co-word analysis, co-citation analysis, multi-correspondence analysis, and histo-bibliography.

**Figure 1**  
Methodological design



Bibliometrix and CitNetExplorer are valuable tools for quantitative research in bibliometrics using data matrices regarding co-citation, coupling, scientific collaboration analysis, and word analysis, an open-source tool accepted by the user community to organize bibliometric research (Aria & Cuccurullo, 2017). Our data analysis using Bibliometrix used four main techniques:

- i) A strategic diagram to generate a Thematic Relevance and Development Matrix of wine tourism studies to provide an overview of the field and the emerging trends. The basis is a co-word analysis. In the Bibliometrix software, this matrix corresponds to the thematic map provided by the function of conceptual structure analysis. We defined as parameters to the output software: 1) authors keywords; 2) Minimum Cluster Frequency (per thousand docs) to words- 5 repetitions; and 3) based on Walktrap algorithm, that is, it used the graph theory to identify communities in large networks via random walks based on the distances between nodes. The density and centrality of the themes are classified and mapped in dimensional diagrams. The matrix plot themes in four quadrants: (1) upper-right quadrant: motor themes; (2) lower-right quadrant: basic themes; (3) lower-left quadrant: emerging or disappearing themes; (4) upper-left quadrant: very specialized/niche themes (Aria & Cuccurullo, 2017).
- ii) From normalized data, we applied the dimensionality reduction technique of Multiple Correspondence Analysis (MCA) to identify the relationship between the themes, the status of the research, and the subfields (Aria & Cuccurullo, 2017). MCA is an exploratory multivariate technique for the graphical and numerical analysis of multivariate categorical data. Bibliometrix software uses co-word analysis to generate an MCA applied to a Document x Word matrix. The method indicates the most important relationships among categorical variables (R. Singh et al., 2022). Our correspondence analysis was performed in the Bibliometrix using the following parameters: Method – Multi Correspondence Analysis (MCA); Field – Author Keywords; Number maximum of terms - 50; Frequency of word repetition - 5; Number of clusters - Automatic. It is a technique to reduce large sets of variables into smaller sets of components that summarize the information contained in the data. Still, the software has some fixed configuration by default, so we did not choose rotation or missing data procedures. The conceptual structure includes natural language processing (NLP) routines to extract terms from the database. Bibliometrix uses Porter's stemming algorithm to reduce inflected (or sometimes derived) words to their word stem, base, or root form. Also, the software uses a Murakami quantification technique (Mori et al., 2016), which is a non-metric principal component analysis for categorical variables with multiple quantifications.
- iii) Histo-bibliography of the field to analyze the citation network. In the CitNetExplorer software, each publication is assigned to a group algorithmically using a clustering technique that analyzes the citation networks. Among the four configuration options in the software for clustering and analyzing citation networks, one option considers the direction of citations (Van Eck & Waltman, 2017). The technique follows a variant of the modularity function. Each node represents an article, and the lines point out the binary nature of the relationship, that is, if one publication cites the other, indicating the author-network temporal path in the structure of the field (Van Eck & Waltman, 2009). By default, CitNetExplorer uses internal citation scores, that is, the number of citations of the publication within the citation network being analyzed. Histo-bibliography, using the co-citation analysis, examines the literature over time, helping detect a shift in paradigms and schools of thought (Aria & Cuccurullo, 2017). Our histo-bibliography provided the path of wine tourism studies; thus, it complements the overview of the state-of-art on wine tourism and cooperation studies. As criteria in the CitNetExplorer, we defined the minimum number of citations as 5, minimum cluster size as 5, merge small clusters, number of iterations as 3, and drill down based on groups.

iv) Content Analysis is used to extract the dimensions of coopetition in wine tourism. We cluster the focus research indicated by the authors and provide the trends on the crossline between wine tourism and coopetition. We adopted a prior codification defined based on the agreement of three senior researchers; then, the articles were fully read by two independent researchers who extracted the data according to three main groups of subcategories:

1. Identification subcategories: publication year, authors, journal, article title, and author's keywords.
2. Structural subcategories: research objective and focus according to the authors' definition.
3. Connection subcategory: actions, variables, or analysis of the wine industry that shows the interplay among stakeholders or synergy among industries. For example, the interplay of winegrowers' cooperatives for co-marketing.

The data was systematized in Excel sheets. Then, in an independent task, two researchers grouped these subcategories and associated them with a code: Territorial synergy and configurational; Interdependency and complementarity to tourism offer; strategic fit; Cooperation Networks and Cooperatives organizations; Management model; Co-marketing and co-promotion; Co-development, and Sustainable development. A third researcher confirmed the codification and decided on some cases of divergence among the researchers in extracting and categorizing information. The three researchers are scholars on wine tourism, coopetition, and tourism destination management, and they are from different universities and countries.

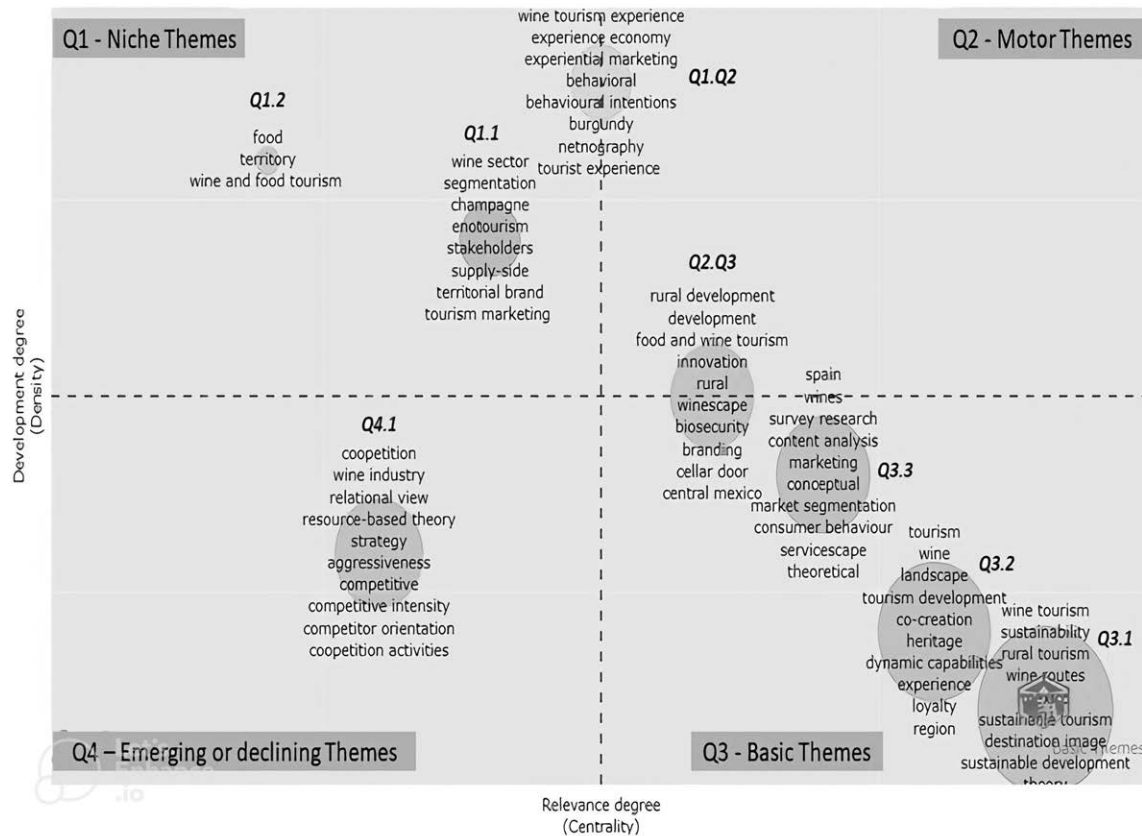
### 3. Analysis of results

According to the criteria (Figure 1), our sample consisted of 201 scientific articles on wine tourism and cooperation, which included 444 authors. The timeline showed an increase in publications from 12 papers in 2012 to 40 documents in 2021; that was the year with more publications. From 2014 to 2022, 177 articles were published, representing 88% of all publications on this theme at WoS, indicating that wine tourism and coopetition nowadays are part of the research agenda.

#### 3.1. Thematic relevance and development matrix of wine tourism studies

We used the conceptual structure analysis through the thematic map of Bibliometrix, which, based on a co-word analysis, classified the research themes into a Relevance and Development Matrix of the studies on wine tourism to answer the RQ1. In the matrix, the x-axis depicts the developed degree of the topic, and the y-axis shows the relevance degree (Figure 2). The matrix has four quadrants. Topics plotted in Q1 represent 'Niche themes' since they have more development but still need more relevance in the studies. Q2 represents the 'Motor themes', topics of study with higher growth and relevance in the studies on wine tourism. Topics plotted in Q3 are the 'Basic themes' as they are studies with higher relevance but minor development. Q4 gathers the 'Emerging or declining themes' in scientific studies. This strategic diagram is from the authors' keywords and shows eight thematic clusters with different densities, sizes, and centralities (Figure 2).

**Figure 2**  
**Thematic relevance and development matrix of wine tourism studies**



Q1 (Niche themes) has two sets. In the first set (Q1.1), studies focus on wine segmentation and its relation to tourism (Figure 2). Coopetition is the basic behavior since the studies showed co-development of value, products, brands, and markets (Kirova, 2021). Coopetition occurs inter-organizationally and inter-sectorial between the wine and tourism industries, as Monticelli et al. (2018) indicated. Due to the increase in competitiveness, more wineries concentrate on specific products and territorial brands, as Alonso and Kok (2020) proved. Investigations in this subset delve into the intricacies of stakeholder dynamics within wine-producing regions, such as the study by Festa et al. (2020). Also, studies focus on the stakeholders of wine territories to develop ecotourism and shared tourism marketing. For instance, they approach the creation of value through the wine as a tourism product, which occurs between winemakers and other stakeholders of the tourism destinations toward loyalty and satisfaction of tourists in the winery (Chi n et al., 2016; Festa et al., 2020; Giacosa et al., 2019; Mitchell et al., 2012).

The second set (Q1.2) is smaller and directly related to the link between *wine and local gastronomy*. The studies amplified the inter-sectorial cooperation to include the synergy with the F & B sector (Food & Beverages services); for instance, Salvagni et al. (2020) studied cooperation innovation and tourism in the grape and wine region - Brazil. Food and wine represent a niche to explore in the tourism offer recognized by the winery scholars (Calabro & Vieri, 2016; Salgueiro Rachao et al., 2020; Robinson, 2021). Nevertheless, it must still be more relevant among wine tourism and coopetition scholars. The research addressed the appreciation of local products, including the local community and their partnership (Crick & Crick., 2021a). Also, there are studies with more significant concern about the cultural sustainability of gastronomy (Zamarreno-Aramendia et al., 2021), which helps wine tourists increasingly experience the winery. Studies

in this quadrant include collaborative initiatives that bridge the gap between wineries and local communities, being essential for fostering positive relationships, sustainable growth, and the maintenance of cultural authenticity in the evolving landscape of wine tourism (Robinson, 2021; Salgueiro Rachao et al., 2021; Tanase et al., 2022).

No sets were entirely plotted inside Quadrant 2 - Motor themes (Figure 2). Instead, one set (Q1.Q2) is on the borderline of Q1 (Niche themes) and Q2 (Motor themes). Another set (Q2.Q3) is on the borderline of Q2 (Motor themes) and Q3 (Basic themes). The set Q1.Q2 focuses on studies on wine tourism as a tourism experience, including research based on experiential marketing (Leri & Theodoridis, 2021), ethnography (De Jesus Contreras & Xavier Medina, 2021), and the intentional behaviour of wine consumers as tourists (Alonso & Kok, 2020). It can be a Thematic Niche and Motor because it contains studies focused on France, a consolidated region in studies on wine tourism, and an innovative area of wine products, for instance, the Charters and Menival (2011) study. Also, Motor themes address issues related to the experiences of different groups (ethnography), as Thanh and Kirova (2018) studied in the context of the wine tourism experience, and the impact on behavioral intentions that can produce new consumer profiles (niche themes); for example, the article of Popp and Mccole (2016) on emerging rural tourism regions based itinerary mapping to a wine tourism region in Michigan. The Quadrant has studies on the brand territory from products and services as a business strategy and leadership in the wine sector (Santos et al., 2020). Also, there are studies on wine tourism profiles, experiences, sensations, new communication channels, and social relationships in wineries (Canovi & Pucciarelli, 2019; Celik, 2019). The cooptation emerges from these studies with the tourist as a player in the co-creation, as claimed in the investigation by Crick et al. (2020). Furthermore, the focus on regional development demands an interplay among diverse partners and a cooptation network (G. Santos et al., 2019).

The set Q2.Q3 focuses on the opportunities for rural development since wine tourism (Figure 2). It is a motor and basic theme of wine tourism since the leading resource of this tourism modality is the wine landscape, which is essentially rural (Manfio, 2019). The scholars highlight the dependence between wine tourism and gastronomy tourism to complement their tourist experience at the winery where the visits occur, for example, the study of Contreras and Medina (2021). The tourists show even more interest in participating in holidays involving local gastronomy and having more significant social interaction and memories through a creative process experience in wine tourism (Robinson, 2021). Also, studies showed the development of wine tourism by valuing the wine-growing landscape as a form of innovation (Salvagni et al., 2020). The cellar door is another theme scholars discuss as a direct channel of sales supported by wine tourism that improves profits for wineries (V. Santos et al., 2022; Baird et al., 2018). Some recent studies focus on the tourist's biosecurity to maintain winery visitation to guarantee wine tourism as a marketing strategy to create brands, local identity, and rural development (Baird et al., 2018; Hall, 2005). Creating regional brands and local identity includes many stakeholders, direct competitors, providers, complementary firms, supporting organizations, and clients; therefore, it is the Value Network that Brandenburger and Nalebuff (1996) suggest as the cooptation process.

Most themes are plotted in three sets in the Q3 (Basic themes). The first set (Q3.1) concentrated on studies of the *sustainability of wine tourism*. It usually develops wine tourism from the wine routes (e.g., Cebrian Abellan & Rocamora Sebastian, 2017; De Jesus Contreras & Thome Ortiz, 2019; Zamarreno-Aramendia et al., 2021), and many studies focus on collaborative alliances in rural wine communities. For example, in Robinson's (2021) study, the development of wine tourism offered a connection between local activity and public/private stakeholders to determine the nature of wine products, considering the potential of all communities involved. Some studies, such as Marlowe and Lee (2018), showed that the designations of the origin of wines are a joint representation directly related to the development's production, quality of the environment's geographical characteristics, and the local terroir. The set also contains destination image studies to generate

rural development (Iatisin et al., 2018; Robinson, 2021; Sottini et al., 2021) and studies on the sustainable use of natural resources by wineries and wine tourism (e.g., Martins et al., 2017; Serra-Cantalops et al., 2021; Sun & Drakeman, 2020). The research points out cooperation to achieve sustainable goals and create a wine tourism destination image, but also a co-competition for resources among the two industries, wine, and tourism. Findings on these topics address the sustainable development of wine tourism. The focus is offsetting through carbon credit (Sun & Drakeman, 2020, 2022), sustainable wine production (Alonso & Liu, 2012; Baird et al., 2018; Coros & Popa, 2018), and green marketing as a differential between the wineries in the last years (Karagiannis & Metaxas, 2020). The Q3 subset occupies a fundamental space within the matrix, examining the interplay between sustainability, collaborative alliances, rural development, destination image, and the conscientious use of natural resources (Andrade-Suarez & Caamano-Franco, 2020).

The second set (Q3.2) studies the *wine landscape* and its capacity to generate loyalty. For example, they consider the value of co-creation from the tourist experience (e.g., Carvalho et al., 2021; Kirova, 2021; Salgueiro Rachao et al., 2021), heritage (e.g., Andrade-Suarez & Caamano-Franco, 2020; Da Silva et al., 2018; Frost et al., 2020), winescape (e.g., Bruwer & Gross, 2017; Williams, 2021), and regional dynamic capabilities to provide a competitive advantage to wine tourism (e.g., Kranjcevic & Gartner, 2019; Scorrano et al., 2019). Scholars' findings indicated an alignment between the local strategies and the other strategies adopted in the wineries, for instance, in the study of Dressler (2017). This alignment can generate the strategic fit that boosts co-competition. The wine tourist highlights his experience, linking the co-competition between the establishments so that all the social and economic actors involved can grow economically, as shown by Dolci et al. (2021). Some studies emphasize that new services are incorporated into visits so that there is always something new for tourists (e.g., Smyczek et al., 2020). The Q3.2 subset encapsulates a spectrum of dimensions, from co-creation and heritage (Frost et al., 2020) to winescape and regional dynamic capabilities (Cassar et al., 2018). Studies in this quadrant underscore the multifaceted role of the wine landscape in the dynamic interplay between co-competition and cooperation within the wine tourism domain.

The last set in Q3 also focuses on *marketing segmentation* (Q3.3) as Q1.1. However, studies in this quadrant have more distance of co-competition behavior. In Q3.3, the scholars studied tourism segmentation from the consumer viewpoint, while in Q1.1, they analyzed it from an offering perspective. Scholars highlight the concept of wine consumers (e.g., Alonso & Liu, 2012; Ruediger & Hanf, 2017; Thanh & Kirova, 2018), opinion research (e.g., Marzo-Navarro & Pedraja-Iglesias, 2009, 2021; V. Santos et al., 2022), consumer behavior (e.g., Goncalves et al., 2022; Sampaio, 2012), marketing segmentation (e.g., V. Santos et al., 2022). Also, the scholars focused on servicescape as a winery service offered to wine tourists, as the study of Bruwer and Gross (2017) considered. Research within this subset collectively contributes to establishing a nuanced understanding of the consumer experience, informing targeted marketing initiatives, and fostering a deeper connection between wine tourism offerings and diverse consumer segments (Mitchell et al., 2012; Riguccio et al., 2017).

As Emerging or Declining Themes (Q4), the results indicated one set of themes related to *classic and novelty theories to study wine tourism*. For instance, the theoretical roots of research on wine tourism are from the classical Resource-based Theory (e.g., Bruwer & Rueger-Muck, 2019; Canovi et al., 2020; Pablo Torres et al., 2021) to the Relational view (Monticelli et al., 2018) to achieve the co-competition assumptions (e.g., Crick, 2018b; Crick & Crick, 2021b; Salvagni et al., 2020; Serra-Cantalops et al., 2021). Also, the set presents studies with new frontiers for managers of the wine industry. For instance, they can balance aggressive co-competition through cooperation using co-opetition activities, as Crick (2018a, 2018b) demonstrated. Co-competition studies showed that rural development in cooperation territories influences wine tourism with social, economic, and environmental opportunities in the local economy (e.g., Baird et al., 2018; Ferreira & Hunter, 2017; Stastna et al., 2020). Research also showed that local events, co-marketing, diversity of entrepreneurs, lifestyle and sustainable tourism, and synergy between rural, mass, and wine tourism minimized the regional seasonality



(Dawson et al., 2011; Peršurić et al., 2016; V. Santos et al., 2022). The Q4 subset stands as an arena of exploration that reflects the dynamic evolution of wine tourism research. It encapsulates the shift from classical theories to more relational and cooperative paradigms (Charters & Spielmann, 2014), showcasing the role of co-competition in driving industry growth and development (Iatisin et al., 2018).

The relevance and development matrix comprehensively explores the studies on wine tourism, showcasing how distinct themes interweave and overlap across the four quadrants. It revealed how co-competition in wine tourism has emerged. The studies showed many operational ways of wine tourism and different approaches and perspectives used in the papers that are typical of co-competition. For instance, the development of joint actions between competitors (Crick & Crick, 2022), strategy fit of stakeholders and sectors (Festa et al., 2020), shared goals as creating regional branding (Scorrano et al., 2019) or image of wine tourism destination (Terziyska, 2017), interdependence and complementarity among firms (Lavandoski et al., 2018), and other modalities of tourism (Dressler, 2017).

### 3.2. Conceptual structure map of wine tourism studies - Correspondence analysis method

We use the functions Bibliometrix with the R package to perform a Multiple correspondence analysis (MCA) with the 201 selected papers. This technique complements the conceptual structure map of wine tourism studies and identifies the current state of co-competition research in the wine tourism segment (RQ1). The Multiple correspondence analysis (MCA) shows two-dimensional graphics reflecting similarity and correspondence (Figure 3). The closer the points represent the keywords in the graph, the more corresponding the distribution, which means that they coexist in the articles with greater frequency, and these terms are the ones that explain the question under study.

The horizontal dimension explained 10.7% of the variance in the data, whereas the vertical dimension explained 7.49%. Together, these two dimensions explained 18.19% of the variance. That low result is due to the broad scholars' focus. There are 912 keywords in these articles. However, the keywords used more than five times are only 7%. The hapax index was 75.9%, i.e., the number of words without repetition was high, resulting in the low power to explain the data variance in the dimensions since 693 words appear only once. Nevertheless, there is a strong correspondence between the keywords on the core groups. Figure 3 shows two groups, one addressing the Wine Sector theme and another focusing on co-competition.

The MCA places the row labels on the plot such that the closer two rows are to each other, the more similar their residuals are. The same logic applies to the column labels. Keywords closer to the plot's center and distributed more concentratedly received more attention from scholars. On the contrary, more evenly spread keywords represent less frequently discussed research topics.

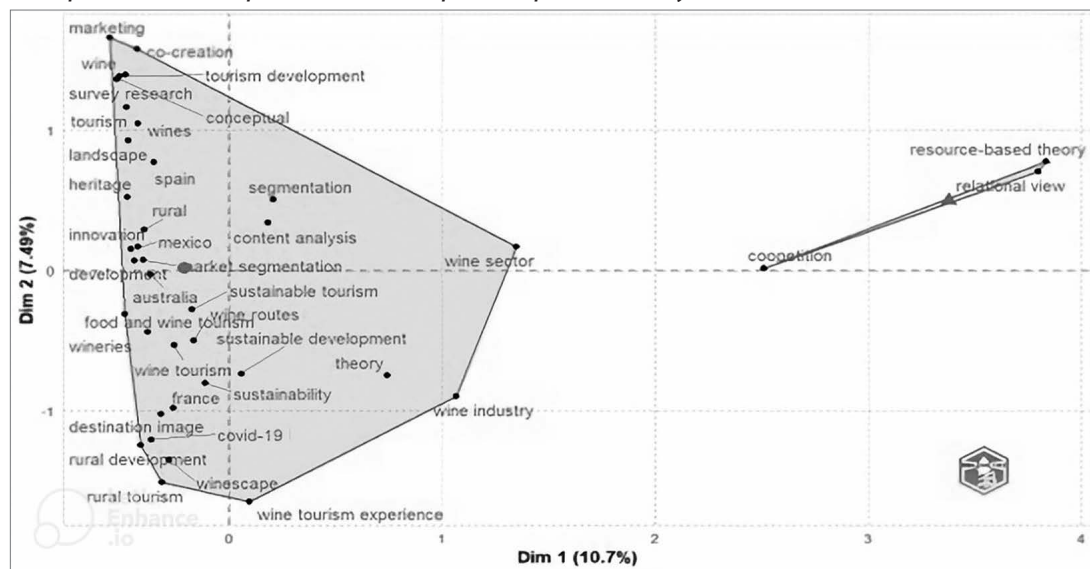
Our results point to a dense group of words relating the wine sector to tourism. There is correspondence among studies about creating a wine tourism destination image through endogenous resources, such as heritage, gastronomy, rural routes, and winescape. An example of this approach is the article by Jones et al. (2015). There is also correspondence in wine tourism research regarding marketing studies and value co-creation, including segmentation, sustainability, and innovation, for instance, the V. Santos et al. (2022) study. A less dense group studied wine tourism using co-competition assumptions as the main theoretical background (e.g., Crick & Crick, 2022). Findings showed a high correspondence between co-competition and the two theories. This stream follows the discussions on co-competition behavior as a relational resource inside the resource-based theory (Crick & Crick, 2021b). It is a rethinking of classical approaches from the co-competition perspective.

The correspondence analysis compares labels based on distances. Longer lines indicate that the row label is highly associated with some column labels. Also, small angles indicate an association, 90-degree angles indicate

no relationship, and angles near 180 degrees indicate negative associations. Our results show an association among the studies since the angles are small, and some words represent themes linked by longer lines, for example, between marketing and wine sector, marketing and rural tourism, or wine industry and wine tourism. Within this landscape, a smaller but significant group of studies is dedicated to exploring coopetition as a theoretical lens. Based on the line distances and angles, they have high correspondence. These investigations underscore a reevaluation of classical approaches through the prism of coopetition, revealing a transition topic in the research agenda of wine tourism, as indicated in the article of Monticelli et al. (2018).

In the resume, MCA results showed a stronger association among studies that formed a cycle between marketing, the wine industry, tourism experience, and rural tourism, which corresponds with many other themes (Figure 3). The Marketing is directed toward the wine sector (Iatisin et al., 2018), co-creation and wine tourism experience (Salgueiro Rachao et al., 2021), rural development (Sottini et al., 2021), and food wine tourism (Gu et al., 2018), with more works on this theme. In the plot, the small coopetition group confirmed that few studies used the theoretical lens of coopetition to understand wine tourism development (Crick & Crick, 2022). Still, they represent a transition topic in the research agenda of wine tourism.

**Figure 3**  
Conceptual structure map with method multiple correspondence analysis (MCA)



### 3.3. Factorial map of documents with the highest contributions to wine tourism

The Factorial map indicates, at the same time, noteworthy articles, and prominent authors in this research area (RQ2). According to remarkable scientific papers, the factorial analysis revealed two clusters (Figure 4). Cluster 1 grouped the highest contributions in wine tourism, while Cluster 2 grouped the highest contributions of coopetition in the wine industry. Despite coopetition as a theme being a smaller dimension in the Conceptual Structure Map generated by the Method Correspondence Analysis (MCA), the topic presented more remarkable papers. This result confirms coopetition as a trend in the researcher's agenda to develop wine synergies and tourism.

Cluster 1 has four remarkable contributions. Singh et al. (2021) verified driving factors for wine tourists to revisit vineyards: countryside lifestyle and spillovers of international travel. Carvalho et al. (2021) showed that wine and food interactions contribute to value creation and co-creating stories among winemakers,

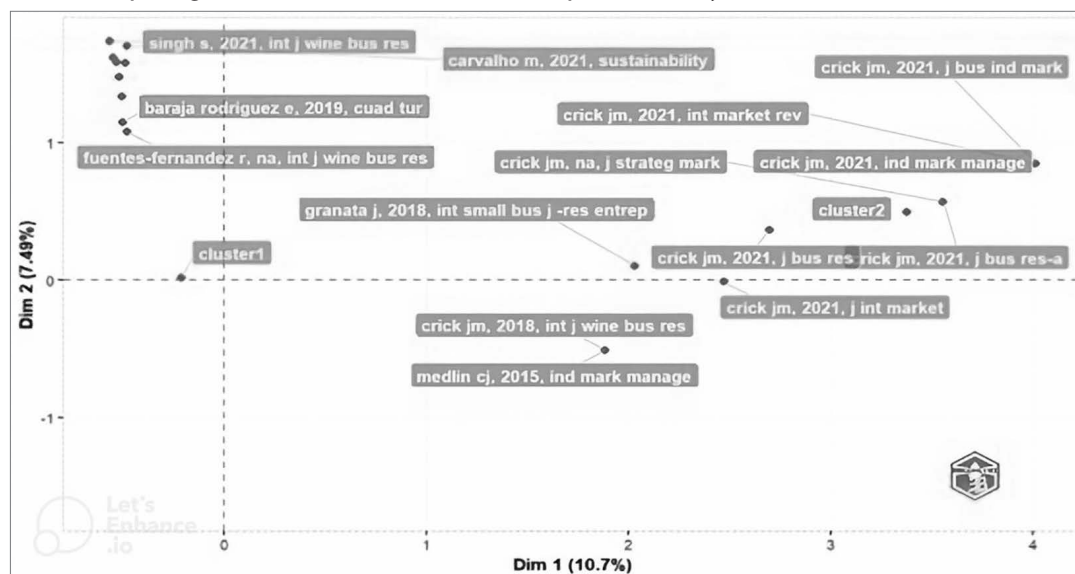
destination stakeholders, and visitors. Baraja Rodriguez et al. (2019) studied wine tourism to consolidate the productivity of quality wines associated with heritage elements of landscapes. Fuentes-Fernández and Gilinsky (2022) focused on cooperation and collaboration in the natural wine industry to face the challenges in the 21st century.

Cluster 2 has nine remarkable contributions, most from the same authors and published recently. Seven outstanding papers from Crick and his co-authors studied the wine industry. They showed: 1) The relationship between a coopetition-oriented mindset and coopetition-oriented behaviors to internationalization in the wine industry from the lens of resource-based theory and the relational view. 2) Coopetition has a non-linear (inverted U-shaped) relationship with the market performance of internationalizing wine producers, and the competitive intensity generates a negative moderation effect. 3) The wine industry is a highly suitable empirical context for researchers to explore coopetition. 4) The importance of social capital in building relationships with trustworthy and complementary partners within and across clusters to enhance the performance of family-owned wine producers. 5) Existence of potential dark sides behind the coopetition-financial performance relationship in the wine industry. 6) Insights on managing risk to owner-managers decision-making after major environmental market disruptions. 7) Coopetition has a positive association with customer satisfaction performance. However, it is negatively moderated by competitive aggressiveness.

Also, in Cluster 2, Granata et al. (2018) is another highest contribution. It analyzes how micro-firms manage coopetition, observing similarities concerning large firms. Findings showed that the smaller the firms, the higher the individual-level dimensions of coopetition. Finally, the study of Medlin and Ellegaard (2015) also was remarkable. They explored the distinctions between non-competitive, competitive, and rival firm activity using a case study of exporters and importers of fine wine, highlighting the healthy behavior and priority of goals as pointers of competitive processes.

These clusters offer a comprehensive panorama of the evolving research landscape, underlining the interplay between wine tourism and coopetition dynamics. Cluster 1 underscores the diverse dimensions of wine tourism, while Cluster 2 underscores the growing recognition of coopetition's role in shaping wine industry synergies and tourism strategies.

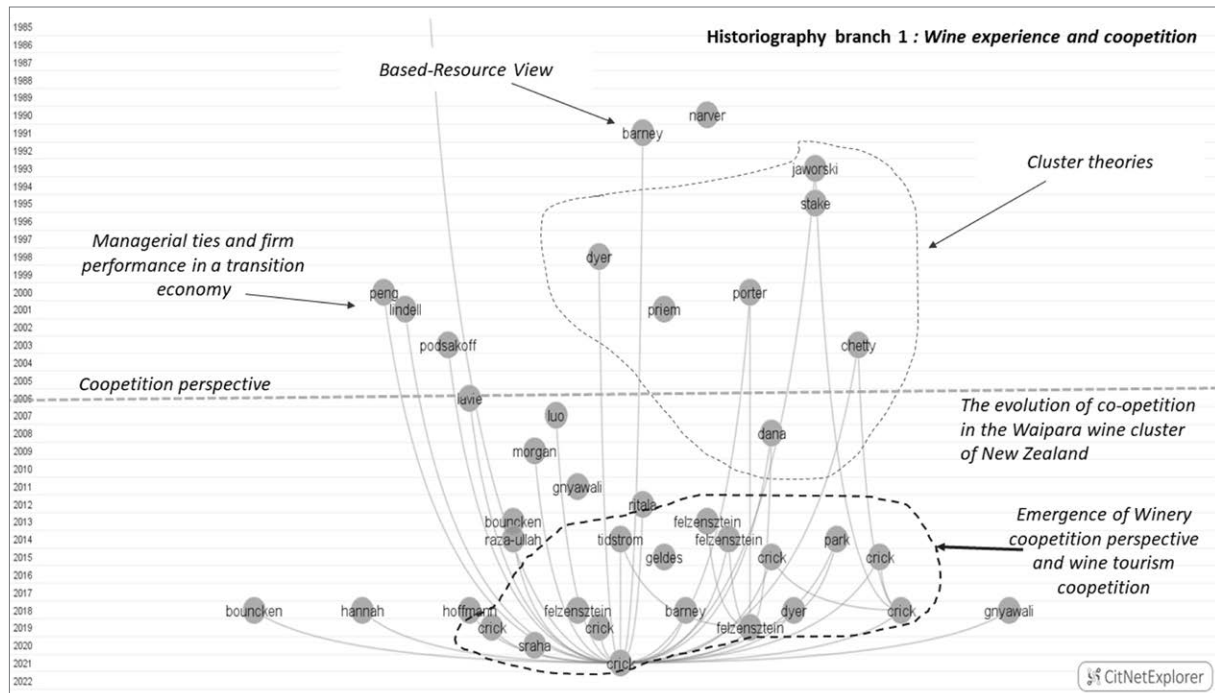
**Figure 4**  
Factorial map of highest contributions with method correspondence analysis (CA)



### 3.4. Histo-bibliography of wine tourism under coepetition: Drivers, evolution, dimensions and trends

To understand how wine tourism study themes and authors are correlated (RQ3), we performed a Historiography Analysis. Of the 201 papers examined on the wine industry, only 26 used coepetition theories as theoretical background. Similarly, only three studied wine tourism directly from a coepetition perspective, although the scholars studied cooperative networks among competitor wineries or alliances along the tourism chain and wine industry. Historiography Analysis, considering co-citation, reveals the relationships between research areas or keywords and articles that frequently cite the same references. We used the criteria 'Based on the predecessor and successor' with clustering technique considering at minimum three iterations. The results showed two branches: 1) Wine experience and coepetition (Figure 5) Wine business coepetition networks (Figure 6).

**Figure 5**  
*Historiography of coepetition in wine studies - Branch 1*



The historiography branch 1 (Figure 5) was called *Wine Experience and Coepetition*. Although coepetition has been published since 1996, this theoretical perspective became an academic background in wine industry articles only in 2006. A remarkable article was Dana's 2008 study on cooperation in a cluster of wines in New Zealand. Dana and Winstone (2008) were references for other studies, creating a denser core of studies on wine tourism and the wine industry from 2014. Since then, a few authors have emerged and concentrated studies on this topic. Most of the papers are from Crick and co-authors or Felzeinsten and co-authors.

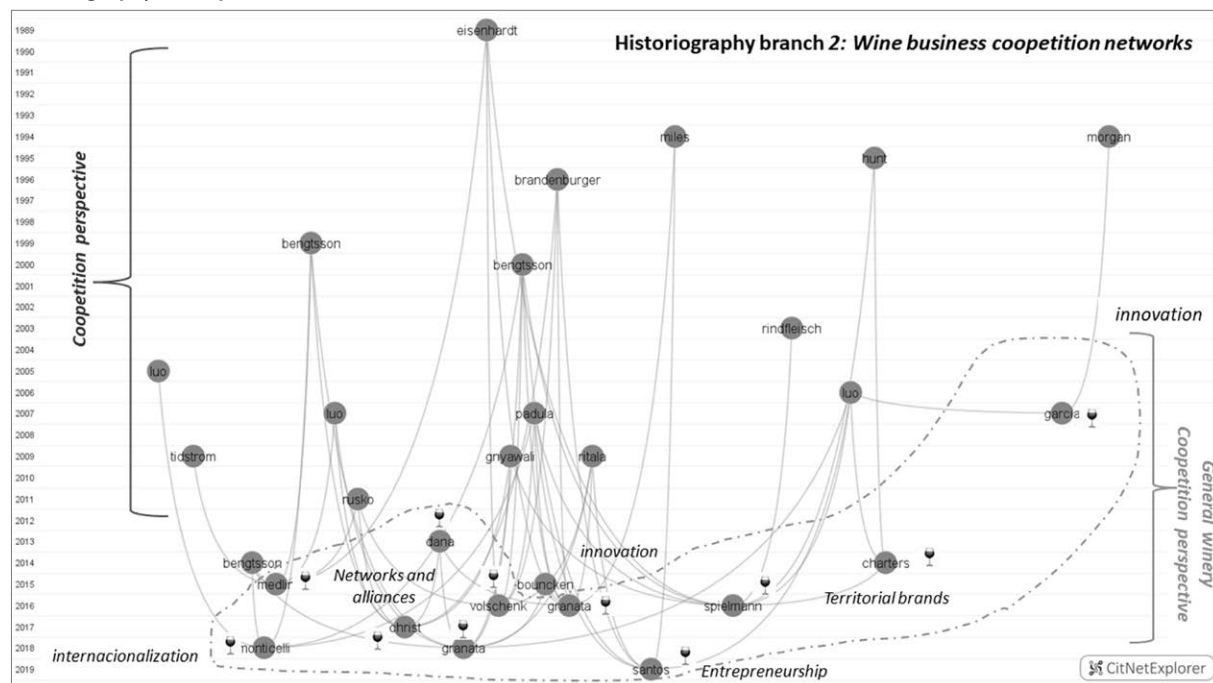
Crick provided directions for future research on coepetition in the wine industry (Crick, 2018b). He studied the facets, antecedents, and consequences of coepetition from an entrepreneurial marketing perspective with 25 wineries. His findings showed that coepetition increases performance in ways that would not be possible if firms did not collaborate with their rivals (Crick, 2018a). In 2020, Crick and co-authors published a study

about a co-creation network among wine hospitality and tourism, such as accommodation and restaurants through wine sales, including at cellar doors. Other studies from Crick and co-authors focused on how to balance co-creation behavior (Crick & Crick, 2021b), co-creation in family-owned wine producers (Crick & Crick, 2021a), the co-creation-oriented mindset and co-creation-oriented behaviors and the sustainability of rural wine regions (Crick et al., 2020). Recently, the author researched how to minimize co-creation risks (Crick et al., 2022).

Felzensztein and co-authors authored other remarkable articles in the historiography of Branch 1. They studied factors that influence the development of inter-firm marketing cooperation (Felzensztein & Deans, 2013) and the internationalization of small firms in wine regions clustered (Felzensztein et al., 2019). The theoretical line of Felzensztein and co-authors follows the cluster perspective and co-creation, and most are empirical studies in Latin America, for instance, at Chilean cluster wine. On the other hand, Crick's studies used the co-creation paradigm and resource-based view theory with empirical research on the Australian wine industry. In both cases, wine tourism is in consolidation.

Branch timeline 1 indicates that the relationship between the wine industry studies and co-creation research has antecedents from cluster theories, Resource-Based Views, and transitory economics studies (Figure 5). The journey in this historiography branch 1 indicates the theoretical cornerstones of co-creation in wine tourism.

**Figure 6**  
*Historiography of co-creation in wine studies - Branch 2*



The historiography of branch two was called Wine Business Experience co-creation networks (Figure 6). The timeline indicates a theoretical background from the seminal publication of Brandenburger and Nalebuff (1996). The studies in this branch tend to include all stakeholders in the co-creation context, not only direct co-creation among wineries (vertical co-creation) or along a productive chain (horizontal co-creation). They consider a diverse network of co-creation that includes direct competitors, complementary businesses, suppliers, and clients. However, branch 2 has no wine tourism studies, only research

on the wine industry to use co-competition as a strategy for internationalization (Monticelli et al., 2018), sustainability corporate (Christ et al., 2017), SME networks (Granata et al., 2018), innovation and entrepreneurship (G. Santos et al., 2019). Branch 2 also has studies on the cycle of value co-creation and value appropriation in the wine networks, for example, the article of Volschenk et al. (2016), whose theoretical base is from Ritala's studies.

The paper's timeline of Branch 2 showed that some scholars recognized co-competition authors, such as Brandenburger, Bengtsson, Ritala, Peng, Rusko, and Padula. This branch focuses on the wine business that provides consolidated networks for co-marketing, value co-creation, and entrepreneurship. Some authors highlight the regional identity, co-brand, and visitors as channels to direct sales. However, the connection with tourism is tenuous and underexplored.

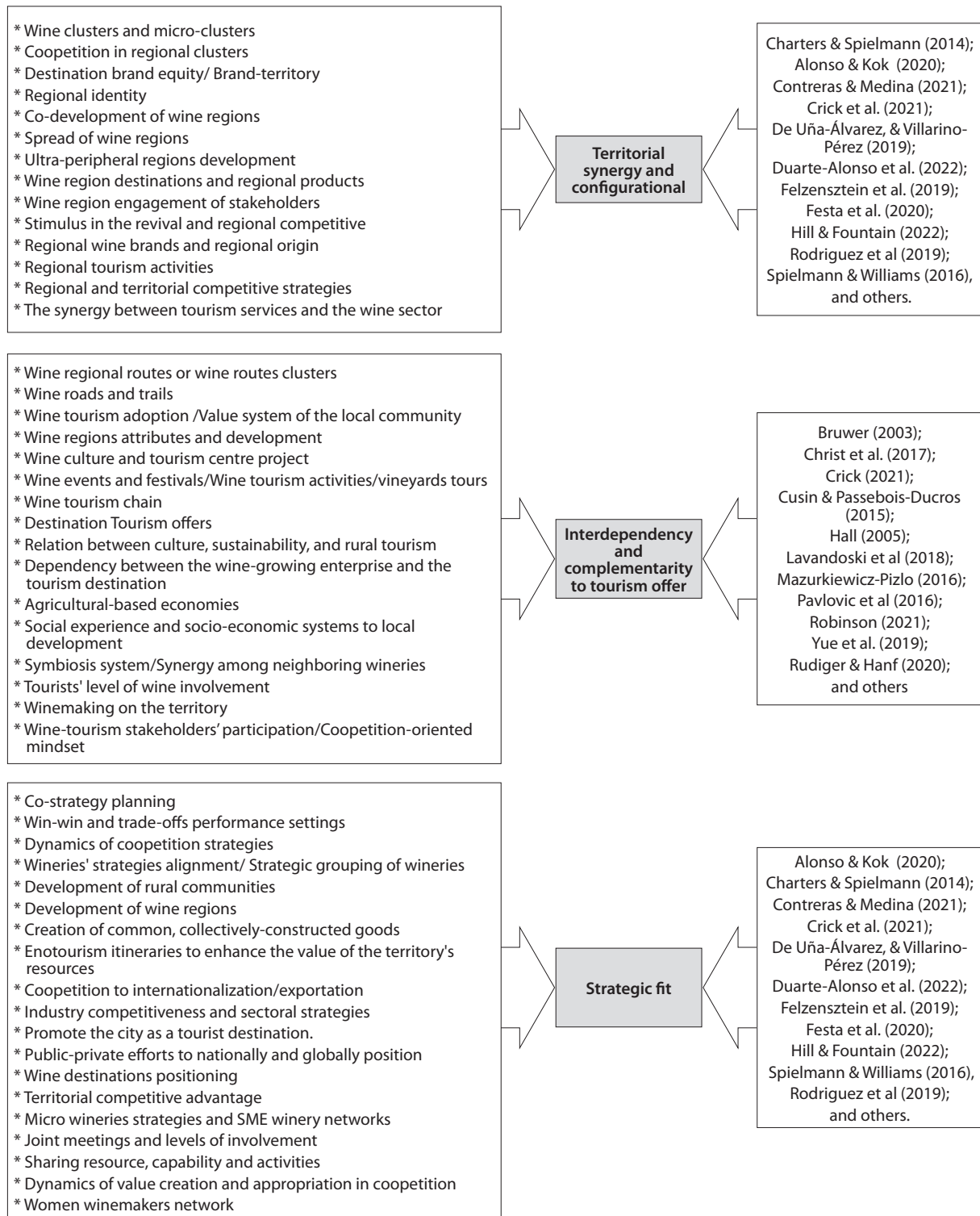
Our histo-bibliography analysis indicated that co-competition is an intrinsic behavior in the wine industry, such as co-developing a regional brand. The two branches evolved from studies of networks and alliances to shared strategies and co-competition, amplifying the number and types of players and industries. Co-competition is also intrinsic in tourism destinations (Della Corte & Sciarelli, 2012). Therefore, it is logical that co-competition is a natural and emergent behavior in wine tourism, almost an elementary strategy. As claimed by Crick (2018b), co-competition in wine and tourism occurs because of the context. Also, co-competition is part of the process, the *modus operandi* of wine tourism, despite being an unplanned strategy, as the study of Fuentes-Fernandez and Gilinsky (2022) demonstrated. Finally, co-competition generates results for the wine industry, as Granata et al. (2016) proved.

### 3.5. Content analysis of wine tourism studies: Dimensions of co-competition motivations

The Content Analysis of the articles reinforced our previous findings and answered the RQ4. We analyzed the focus of each research to identify the motivations for the interplay among wine industry stakeholders according to the codes presented in the methodological section. Results showed that most of the time, co-competition in wine and tourism is not an intentional strategy. It is an emergent behaviour due to the territorial wine context (Crick et al., 2020), strategic co-planning (Granata et al., 2016), and shared goals and objectives (Volschenk et al., 2016; Felzensztein et al., 2019). Furthermore, sometimes co-competition is a context; other times, it is a process or result of the wine industry and tourism. Thus, we regrouped our codification results into three typologies (context, process, and results).

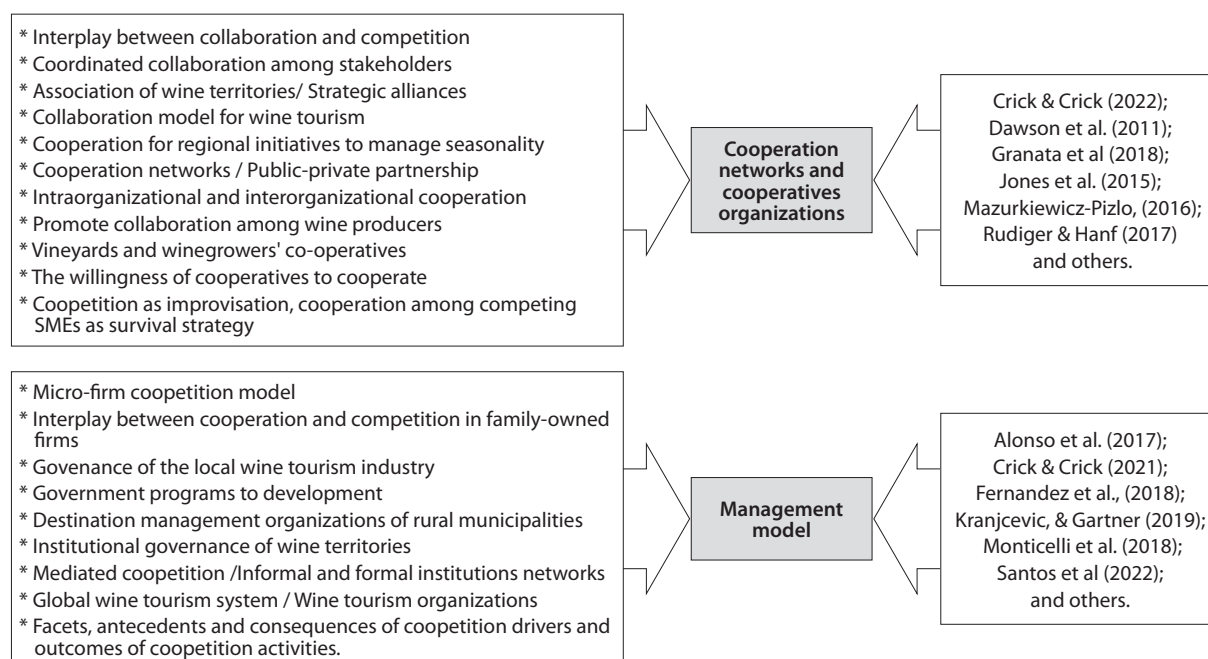
Figure 7 shows a synthesis of motives for unintentional co-competition as context and examples of studies in this line. Co-competition, analyzed as context, is a chain that adds value to a firm through its environmental interactions (Bengtsson et al., 2010; Monticelli et al., 2018). In wine tourism, co-competition as context is the wine territories and their organization; therefore, the motivations are related to 1) Territorial synergy and configurational: It shows wine territories' collaborative and synergistic aspects. It involves motives related to drivers to different players within the wine tourism ecosystem to create an attractive destination; 2) Interdependency and complementarity to tourism that cover motives that emphasize co-competition to enhance the variety and appeal of the tourism offer within wine territories. Different actors contribute distinct offerings that collectively create a well-rounded visitor experience; 3) Strategic fit refers to motives derived from the strategic rationale for co-competition within wine territories. It considers how working together strategically benefits individual actors and contributes to the overall competitiveness of the destination.

**Figure 7**  
**Dimensions and motivations of unintentional coopetition as context**



As a process, coopetition is studied by several authors who analyze organizational networks that use coopetition strategies. These studies assume coopetition with a subfield of strategy and a new paradigm. The motives extracted from the wine tourism studies indicated two dimensions of coopetition as a process, primarily unintentional: 1) Cooperation Networks and Cooperative Organizations and 2) Management Model (Figure 8). The first dimension, the motives for coopetition, is collaboration networks between wineries (Crick & Crick, 2022), wineries associations (Mazurkiewicz-Pizlo, 2016), regional joint development initiatives (Fuentes-Fernandez & Gilinsky, 2022), and public-private partnerships (Festa et al., 2020; Dawson et al., 2011). The motives are survival and business development, which press toward a coopetition behavior. The second dimension grouped motivations related to the management model in wine tourism that gathers many family-owned firms (García Fernández et al., 2018; Crick & Crick, 2021) and SMEs through governance and public policies in wine territories (Alonso-del-Real et al., 2017; V. Santos et al., 2022). Also, some motivations are related to the emergence of Rural Tourism Management Organizations and Wine tourism organizations (Rudiger & Hanf, 2017; Alonso et al., 2017), which can foster the consolidation of coopetition.

**Figure 8**  
*Dimensions and motivations of unintentional coopetition as a process*

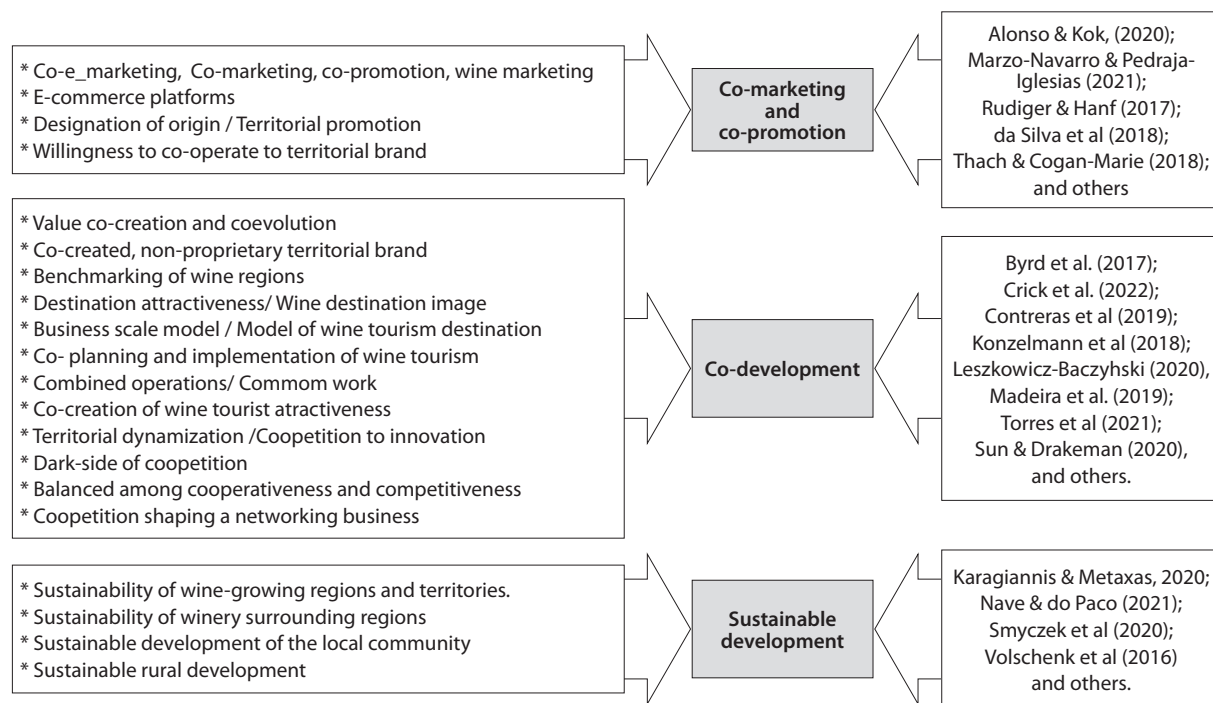


Coopetition, as a result, can be intentional or unintentional. In the wine tourism or wine industry, coopetition emerges from the context and often improves performance, generating outcomes. The content analysis extracted the motives and grouped them into three dimensions of coopetition: Co-Marketing and Co-promotion, Co-development, and Sustainable Development (Figure 9). The first dimension focuses on shared marketing actions that are usual in many tourism destinations, and it is one of the most recognized outputs of tourism coopetition (Alonso & Kok, 2020; Spielmann & Williams, 2016). The joint promotion of the wine destination and the developing of marketing strategies, such as e-commerce platforms (Marzo-Navarro & Pedraja-Iglesias, 2021), results in cooperative networks. In the second dimension, Co-development, the authors focus on cooperative business models, combined operations, and other ways of shaping networks (Byrd et al., 2017; Crick et al., 2022). Even if the network of stakeholders is not consciously managed under the assumption of coopetition, cooperating competing is present in the structure formed, bringing results.



It produces territorial promotion, innovation, and strengthening of the territorial brand due to Co-planning and implementation of wine tourism. However, a recent study also warns about the undesirable outputs of competition due to the networks among competitors (Crick et al., 2022). In the last dimension, the scholars focus on the sustainability of wine regions, communities, and the winery surroundings (Baird et al., 2018; Volschenk et al., 2016). The theme of sustainable development is essential, especially in rural areas and tourism (Baird et al., 2018). Nevertheless, scientific production on cooperation, wine tourism, and sustainability is scarce.

**Figure 9**  
*Dimensions and motivations of unintentional cooperation as a result*



## 4. Conclusions

Our study has two groups of findings. Firstly, results derived from the multi-methods of bibliometric analysis, namely thematic cluster and citation analysis, matrix and historiography analysis, and multi-correspondence analysis (MCA). These bibliometric analyses allowed answers to three research questions (RQ1 to RQ3). Second, findings from the content analysis provided evidence to complement the answer RQ4. We identified the motivations for the interplay among wine industry stakeholders and provided an overview for future research on cooperation in wine tourism.

According to our results, studies of cooperation in wine tourism show that it is a trend. Although only 1,5% used cooperation as the leading theory to study wine tourism, in the remaining 98,5% of papers, the approaches focus on collective strategies, networks, and co-creation among a diversity of players and sub-sectors. It reinforces Crick's (2018) assumptions: wine tourism is a proper context for the cooperation strategy. Many studies focus on cooperation among wineries, i.e., among competitors, although the authors do not name it as cooperation.

In different ways, the scholars studied the interplay among stakeholders in regional development, from tourism and winescape, through strategic adequacy of networks, clusters, associations, or governance. It is

coopetition, although the practitioners were not aware of it. Although unintentional and therefore not planned as a coopetition strategy, the interplay between the wine industry and tourism showed a hybrid behavior of cooperative coopetition. It can be the foundation of its fruitful development.

Findings from the Content Analysis showed that motivations for coopetition could come from the winescape context (intrinsic behavior), from the wine business models (partnership processes), or even from the results of wine strategies (coopetition outcomes). The conclusions emphasize the complex interplay between coopetition and cooperation in wine tourism and open possibilities for further studies to provide theoretical development and practical applications.

## 5. Theoretical implications

Findings point out that coopetition is a transitional theme as a new paradigm to understand the connection between wine tourism and the wine industry. The studies can provide an evolutionary view of the cooperative relationship between wineries and their rural surroundings, a new frontier of management to wine tourism destinations. The overview of the themes of wine tourism studies is one of the theoretical implications of our study. We clustered the themes into four groups: 1) Wine segmentation studies - mainly focused on wineries clusters, specific products, territorial brands, co-creation of value, and stakeholders of wine territories to develop ecotourism and shared tourism marketing; 2) Tourism experience studies - primarily toward experiential marketing and intention behavior of wine consumers as a tourist, as well as the opportunities for rural development since wine tourism. 3) Studies of sustainability of wine tourism - mainly toward developing sustainable wine tourism routes, collaborative alliances in rural communities, and servicescape as a winery service offered to the wine tourist; 4) New theories to study wine tourism - essentially associated with the relational view and coopetition that can balance the aggressive coopetition through cooperation generating rural development based on the influences of wine tourism with social, economic, and environmental opportunities in the local economy. In all four thematic groups, there are authors whose studies are directed at the wine industry and others at wine tourism, but all papers present joint actions to co-develop a group of firms or regions.

The line of coopetition theoretical background in the wine industry started from the remarkable article of Dana in 2008 on cooperation in a cluster of wines in New Zealand. Since then, we have found a few authors' emergent but highly concentrated studies of Crick and co-authors or Felzeinsten and co-authors toward the wine industry. Crick started to study wine tourism in 2020. Other remarkable authors who are more focused on the synergy of the wine industry and tourism are Singh (2020), Carvalho (2021), and Rodrigues et al. (2019).

Another theoretical implication is understanding the motives of coopetition behavior in wine tourism. We provided an approach that showed many motivations, some of them due to the context (territorial synergy), others by the process (winery regions *modus operandi*), or motivated by the results (shared outcomes). Our findings pointed out that despite many motivations, it is usually unplanned coopetition. We provided the eight dimensions of motives for coopetition in wine tourism into Territorial synergy and configurational, Interdependency and complementarity to tourism offer, Strategic Fit, Cooperation Networks and Cooperative organizations, Management Model, Co-Marketing and Co-promotion, Co-development, and Sustainable Development. These dimensions of motives can create an explanatory model to foster planned coopetition in wine tourism.

## 6. Practical implications

From a practical viewpoint, our results indicated that the studies performed by the authors focus on shared strategies for regional development, alliances, governance models, collaborative systems, territorial brands,

regional routes, and so on. Therefore, it is unintentional coopetition. Our findings support the claim that wine tourism is an ideal context to test the coopetition theory and shape the direction of future research (Crick, 2018). Also, the findings suggested that coopetition creates collective value for wineries if they work together despite the coopetition to appropriate the generated benefits (Sigala, 2019). The results showed practitioners and managers that coopetition networks help wine-growing regions promote tourism growth. Coopetition benefits tourism by allowing it to be developed based on endogenous resources. It boosts social inclusion, competitiveness, quality of life, business performance, development of local gastronomy, tourist experience, sustainability, and highlighting of the terroir of the region (Alonso & Kok, 2020; Salvagni et al., 2020; Scorrano et al., 2019; Sottini et al., 2021).

The cooperative networks result in the joint promotion of the wine destination and the development of marketing strategies, such as e-commerce platforms (Marzo-Navarro & Pedraja-Iglesias, 2021). Another indication to practitioners derived from our analysis is the emergence of Rural Tourism Management Organizations and Wine tourism organizations. They are a way to formalize the network since they are coopetition hubs. These organizations aim to manage the network, minimize intrinsic tension, and press to consolidate cooperation. In the co-planning and implementing wine tourism, there are essential motives to promote collaboration between wineries, such as territorial promotion, innovation, and strengthening of the territorial brand. Finally, studies showed that cooperation could result in collective and individual advantages for wine destinations and the wine industry. Therefore, practitioners must foster a competitive mindset and promote actions to improve the willingness to cooperate among the stakeholders.

## 7. Limitations and further research

It is essential to note that while we confined our search to the Web of Science database due to software compatibility, this resource's comprehensiveness and multidisciplinary nature helped mitigate this limitation. The number of analyzed papers might seem limited, but our stringent search criteria aligned with our research objectives. As the coopetition in wine tourism research continues to evolve, more studies addressing these limitations can advance and enrich our understanding of this strategy for the wine industry. Despite this limitation, our research acknowledges coopetition as the primary behavior of wine tourism. It provides a solid foundation to help shape the future discourse and strategies in the wine tourism industry.

Despite the growth in coopetition studies, the current state of this subject, which is applied to wine tourism, needs more development. Also, it is necessary to improve coopetition as an intentional strategy. The coopetition is critical to the interplay between tourism and the wine industry. Thus, we suggest further research in this direction. Research is needed to develop an explanatory model of wine tourism cooperation as a tool to manage the industry synergy and the winescape. Reshaping the wine tourism destination as a strategic coopetition business model could help build this knowledge and provide more effective results from this strategy. Studies on how individuals are driven and prepared to embrace coopetition behavior mediated by destination tourism organizations or wine industry associations are another theme to scrutiny. Despite recognized studies on value creation and appropriation in coopetition, only some studies explain how firms manage this value cycle in wine tourism. Also, only one study deals with the dark side of coopetition in the wine industry. The coopetition risks still represent a significant gap in research. New studies can deepen the use of a coopetition strategy to achieve sustainability in wine tourism destinations, considering the importance of this topic to both the rural winescape and the tourism sector.

Finally, the interplay among public and private partners as an intentional process of coopetition for local development from wine tourism is only starting to be built by practitioners and scholars. Coopetition capability is a competitive advantage because of the interdependence and complementary nature of the wine industry and tourism. We encourage further empirical research to apply the coopetition strategy to wine tourism.

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