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Wine producers' perceptions of wine tourism

Abstract

Wine tourism has generated tremendous interest over the last two decades from both, both, industrial and academic circles. Wine tourism is a hybrid activity that integrates wine and tourism industries. Many wine regions and wine producers promote their wine through visitations of wineries. Wine, wine region and wine producers are main elements of wine tourism product. A successful wine tourism experience depends on point of view of producers on visitation to wineries as well as quality of wine and regional attractiveness. On the other hand, tourism is often a secondary product for wine makers, whose primary focus is on grape growing and wine production. Wine producers have an important effect on development of a wine region and quality of wine tourist experiences in this region. For small wine producer, wine tourism can be marketing activity and a promotion tool. However, for large wine producers, wine tourism brings some extra cost for their operations. This study aims is to determine differences of perceptions of wine tourism between wine producers according to their size. A survey of 84 Turkish wineries was conducted to investigate differences of wine tourism perception between wineries according to their production levels. The results indicate that many wine producers are aware of benefits and cost of wine tourism, but that they also vary with the size of the winery.

Keywords:
wine tourism; wine producer; Turkish wine industry; Turkey

Introduction

Due to geographic latitude Turkey has an important predisposition for viniculture and, therefore, wine production. History of wine production in Turkey goes back centuries BC. First vitisvinifera originated in the Caucasus and Anatolia almost 6000 years ago. In Anatolia, wine had been produced by many ancient civilizations like Hittite, Phoenician and Lydia (Doğer, 2004; Mc Govern, 2003). Although, as its history testifies, Turkey has a great potential for wine production, winery and vineyards visitation has only recently become important for, both, wine producers and wine regions. However, with the traditional orientation on summer holiday market segment, visits to wineries and wine tasting are less important motivating factors for visitors. Therefore, many wine producers and wine regions have not, to date, organized their wine tourism product.

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Yet, wine tourism is beneficial both to the winery, the wider community and industry as a whole (Beverland, 1998). While wine tourism has been in existence for many decades in Europe, it is also of considerable importance in the New World wine countries, with areas like California's Napa Valley and Australia's hunter Valley becoming prime wine tourism destinations (Getz, Dowling, Carlsen, & Anderson, 1999). Since middle of 1990s, many New World Wine regions have embarked on wine tourism development, especially in Australia (Macionis, & Cambourne, 2002; Getz et al., 1999), where one of the first regional wine tourism strategies was drafted in 1998 (Brown, & Getz, 2005). The increased popularity of wine tourism was also accompanied by the increased interest of scholars, with a sizeable body of work published on the topic, especially from the industry or destination perspective, but whose focus was mostly on the New World countries. This is mostly due emphasis given to wine tourism in a number of countries, and in particular Australia, where wine tourism is considered a tool for creating competitive advantage (Getz, & Brown, 2006). Wine market is extremely competitive and wine producers often look for new distribution channels, of which direct cellar door sale to visitors is becoming increasingly popular (Mc Donnell, & Hall, 2008). Although, wine and tourism have been closely associated with each other for many years, recently the importance of wine tourism as a major source of revenue has become increasingly recognized by researchers and industry specialists (Dodd, & Kolyesnikova, 2005).

In spite of the size of Turkish grape production and emerging wine industry built on this, the wine tourism has not yet been recognized for its potential. To the extent that wineries should take the lead role in initiating wine tourism development, it is of importance to determine the attitudes of winery operators towards opening up their establishments to visitors. In this context, the purpose of this study is to determine wine producers' perception of wine tourism. The paper is divided into three main sections. Firstly, wine tourism and the role of wine producers in wine tourism are discussed. Secondly, an overview of Turkish wine industry is provided. Finally, results of winery survey are presented, with an aim to determine the Turkish's wine producers' perceptions of wine tourism.

Wine tourism and wine producers

Wine tourism, as special interest tourism, encompasses a wide range of experiences built around tourist visitation to wine outlets, wineries and wine regions (George, 2006). One of the most widely used definition of wine tourism is from visitor perspective. Hall has defined wine tourism as visitation to vineyards, wineries, wine festivals, and wine shows for which grape-wine tasting and/or experiencing the attributes of a grape-wine region are the prime motivating factors for visitors (Hall, 1996). However, while Hall proposed a customer oriented definition, Getz's definition is multidimensional. According to Getz (2000), wine tourism has many dimensions. Firstly, from a destination point of view it is a strategy to develop and market wine related attractions, secondly, from a customers point of view it is their motivation and attitude to prefer a wine destination and thirdly, from wine producers perspective it is an opportunity to educate and sell their wine directly to customers. At this point wine tourism can be defined a marketing opportunity for wineries to educate and to sell their products directly to consumers (Getz, 2000).

Wine tourism is a relatively new tourism product and, as such, is confronted by a range of critical development issues, which have potential to adversely affect its sustainability and long-term profitability (O'Neill, & Charters, 2000). One such issue is that of wine producers' perception of visitation to wineries. Wine producers and wineries are the core attractions for wine tourists, but not all wineries want or need to develop a tourism orientation (Getz, & Brown, 2006a). Tourism is often a secondary product for wine makers, whose primary focus is on grape growing and wine production and, as such, represents a form of diversification from agricultural production to the provision of value added services and experiences (Macionis, 1998). Wine-makers exhibit a strong product orientation, focusing predominantly on wine production and often having little understanding of tourism or tourism marketing. The problem is that wine tourism is essentially a secondary or tertiary activity for most wineries, despite visitors or cellar door sales being an economic essential for the cash flow of many small wineries. The focus is on wine making and the final wine product, with often little understanding of tourism and tourism needs, marketing and service standards (Beames, 2003).

Wine tourism has many advantage and disadvantage for wine producers. The importance of cellar doors sales for producers is clear. The minimal distribution costs (by bypassing wholesalers) and consequently higher margins make sales at the cellar door particularly attractive to wine producers (Charters, & O'Neill, 2001). Wine tourism also facilitates producer–consumer interaction and involves education about and experience of wine products and wine regions including local cultures and winescapes (Fraser, & Alonso, 2006). Some wine producers have focused on using various forms of wine tourism — cellar-door tasting and sales, vineyard and cellar tours, and wine festivals — as a means to increase the amount of sales in the short term and educate the consumer and create brand and product loyalty in the longer term (Hall, & Mitchell, 2000). In addition to the cash flow generated by cellar door sales, an implicit reason given for these activities is brand building in terms of awareness and eventual repurchase of varieties of the brand (Barry, 2008).

Wine tourism is an important component of the potential marketing and selling mix of wineries and wine businesses. Many wineries often do not have sufficient production to distribute through wholesale or retail channels. Wine tourism, in such cases, can be the core business for many small wineries. For such wineries, wine tourism is an opportunity for increased margins and brand awareness (Dodd, 1995). It provides cash flow and assists in achieving a better sales mix at higher price or yield for small wine producers. It also enables them to successfully brand their product and winery (Hall et al., 2000). For others, wine tourism may be secondary part of their business operation, though potentially serving roles as a sale/promotional channel and/ or a means of educating the customer (Hall et al., 2000). Therefore, small wineries are the ones that are most dependent on sales at their premises. The sales of wine directly to visitor are also more profitable as transport and retail costs are avoided (Fraser, & Alonso, 2006). The effect of wine tourism for large wineries is variable. Wine tourism is the way to increase publicity and is important public relation tool for large wine producers (Hall et al., 2000). On the other hand, for large wineries involvement in wine tourism creates additional costs and takes up valuable management time (Dodd, 1995). In short, regardless of the winery size, wine tourism is important for them as it can: increase wine sales; educate visitors and foster brand loyalty; attract new market segments; obtain higher profits from wine sales; improved links with wine trade; create new networks and clusters (e.g. with tourism industry) and test new wines (Dodd, 1995; Getz, 2000).

In spite of these benefits, there are also some disadvantages associated with winery involvement in tourism - increased costs and management time, capital required and inability to substantially increase sales (Dodd, 1995). In some cases, wine makers do not see themselves as a part of tourism industry, and while they might welcome the extra sales from the cellar door, they also might view the tourism side of their business as a distraction (Beames, 2003). Nevertheless, many wineries are also important enterprises within their local communities and, even though not considering the visitors' side of their business important, they might get involved as they feel a responsibility to do something for regional wine tourism (Beames, 2003).

In summary, the review of the literature is clearly pointing out that: a) there are many benefits that can be realized by the involvement in wine tourism, but that the potential costs associated with wine tourism involvement at the level of individual enterprise should not be ignored and b) the way benefits are perceived can vary with the size of the winery, as their size might determine the available capital for investment, the availability of human resources and the readiness to take a risk. Thus, when questioning wine producers perceptions on wine tourism, especially in terms of getting valuable input into policy development, besides ascertaining opportunities that they recognize, potential costs and benefits should also be included. Therefore, the specific aims of this study was, firstly, to obtain wine producers perspectives on cost, benefits and opportunities associated with involvement in wine tourism and, secondly, to ascertain if these perceptions vary with the size of the winery.

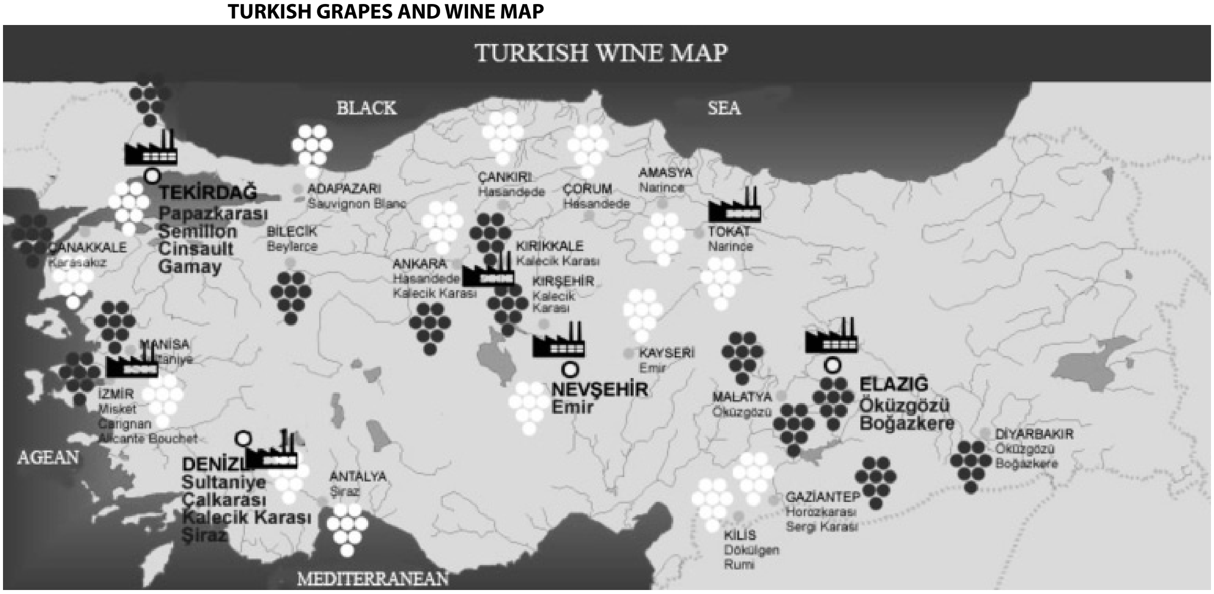
Turkish wine industry

Due to climate, and geographic latitude, Turkey has a considerable grape and wine potential. Turkey has the fourth largest area of land devoted to vineyards in the world. With 482,789 hectares under vineyards, Turkey is the sixth biggest grape-growing country in the world (3,919,000 tones/year) (TURKSTAT, 2009; FAOSTAT, 2009). Approximately 37% of Turkey's grape production is set aside for raisin, 50% for consumption of fresh grapes and 12% for wine production (TURKSTAT, 2009). There are almost 1,100 grape varieties, of which 34 are used to produce wine and only 22 are indigenous (Gumus, & Gumus, 2008).

In spite of the long history of grape production, wine production is relatively new. More serious development started about 30 years ago, with the lessening of religious influence and favorable governmental policies. In 2005, 287,000 hl of wine were produced and 268,000 hl were consumed. This was consumed mostly domestically, as only 27,000 hl were exported (OIV, 2009). In terms of Turkish alcoholic beverages consumption, wine takes third place, after raki (an aniseed-like spirit) and beer (SPO, 2007), but its consumption is growing steadily. Most often these are dry red wines, even though quality white wine grapes are produced. Rose and sparkling wines are rare. As seen in Figure 1, grapes are grown though the entire country, although wines are mostly produced on the North West and West side of Turkey. The major wine production regions are Tekirdağ (Mürefte, Şarköy), Çeşme, Ankara and Cappadocia and Elazığ (Yalçın, 2006).

As in many countries, wine production is fragmented and small producers dominate. However, there are attempts to improve quality of wines and bring it up to the international standards. In that respect, in 2009, there were 84 firms with the production and sales license from Tobacco and Alcohol Market Regulatory Agency (TAPDK, 2009). Recently, a number of reports were prepared for development of wine industry. One of these reports produced by the State Planning Office (Committee Report of Beverage and Tobacco and Tobacco Products) is focused on identifying strengths and weakness of Turkish wine industry. According to this report, the State Planning Office identified a rich gene potential, large vineyards, cheap labor, climate and soil conditions variety of vitisvinifera, agricultural techno parks as major strengths of wine industry in Turkey (SPO, 2007). Coupled with Turkey's significant tourism potential, Turkish wine tourism product has an important opportunity for progress with support in terms of funding and more favorable tax policy.

Figure1
TURKISH GRAPES AND WINE MAP



Source: adopted from www.sarapgunlugu.com

Methodology

As outlined in the introduction, the aim of the research was to identify wine makers perceptions of the wine tourism and their own involvement, as they are the backbone of wine tourism and the knowledge of their perceptions regarding involvement in wine tourism is essential in shaping effective policy. Thus, the focus of the study was on wine producers. Due to the fragmented and often unregistered wine production, it was impossible to identify all wine producers in any wine region of Turkey. Therefore, the population of this study was defined as all wine producers officially certified. As there were, in 2008, 84 such wine companies (TAPDK, 2008), the entire population was surveyed. When officially certified, TAPDK also groups them according to the volume of annual wine production, so they were divided into three categories – small (1 to less than 100 thousand liters), medium (100 thousand to less than 1 million liters) and large producers (1 million liters or more). For the purpose of this study, this official classification was used and results compared across these categories. Data was collected via phone interviews and, in the cases where respondents have requested so, the questionnaire was sent to them via e-mail. In total, 25 wine producers participated in the survey, resulting in a response rate of 32%. While this rate can be considered low, especially given the method of data collection, it is similar to response rate reported in other studies focused on wineries and winery visitors (Alonso, Sheridan, & Scherrer, 2004; Bruwer, 2003; Christensen, Hall, & Mitchell, 2004).

Survey instrument consisted of a questionnaire, containing 20 close ended questions that sought to collect information on wine producers' perceptions of wine tourism in terms of benefits, costs and opportunities. These dimensions were identified in the literature review as important for winery involvement in wine tourism. Participants were asked to rate each attribute's importance on a five-point Likert-type scale, ranging from 1 for strongly disagree and five standing for strongly agree. Kruskal-Wallis test was applied. Kruskal-Wallis test is a nonparametric (distribution free) test, which is used to compare three or more groups of sample data.

Results and discussion

As identified through the literature review, the cost associated with the involvement in wine tourism can be a major obstacle to involvement and often might be seen as out weighting potential benefits. In that context, it is likely that the perceptions of winery visitation will vary with the size of the winery.

Costs are becoming less of an obstacle as the size of the winery is increasing. Table 1 features responses on cost dimension of wine producers' perception about wine tourism. According to Table 1, large wine producers agree on an educational cost of wine tourism. Due to their expectations of wine tourism benefits, large producers are concerned not only with wine production but also tourism and visitation of wineries. For this reason tourism education for their staff is a cost item for them. Investments need to vineyards are seen a cost for medium wine producers. Medium and large wine producers are aware of importance of new technologies such as web page for marketing and promoting wine tourism experience. Therefore, they agree on it as a cost item. Responses of all three groups of producers indicate that "need of new production technologies", "increase of management costs" and "need new sales store" are not seen as a cost item for producers by the time they open their wineries to wine tourists. As a result of Kruskal Wallis test there is a significance differences only on the item "need of new investment in vineyards" (P: 0,025-P<0.05) according to the size of the winery.

Table 1
COST DIMENSION OF WINE PRODUCERS' PERCEPTION OF WINE TOURISM

Statements	Total		Small producers		Medium producers		Large producers		p-value**
	Mean*	SD	Mean	SD	Mean	SD	Mean	SD	
Need for increased quantity of production	3.84	0.688	3.90	0.568	3.60	0.843	4.20	0.447	0.28
Need for new investment to vineyards	3.80	1.291	3.10	1.287	4.60	1.287	3.60	1.637	0.03
Need for new information technologies (Internet)	3.76	1.052	3.20	1.135	4.10	0.876	3.91	0.837	0.12
Necessity to provide tourism training to sales employee	3.52	1.388	3.20	1.549	3.40	1.430	4.40	0.548	0.36
Need new retail stores	3.48	1.194	3.00	1.155	3.80	1.398	3.80	0.447	0.27
Need new production technologies	2.92	1.356	3.10	1.449	2.90	1.524	2.60	0.894	0.71
Increased management cost	2.68	1.180	2.50	0.972	3.00	1.247	2.40	1.517	0.48

*response on a 5-point scale, with 1=strongly disagree and 5= strongly agree
**Kruskal-Valis test of p<0.05

It is important that benefits of wine tourism are recognized by producers. This situation raises expectation of wine producers from wine tourism and therefore wine producers are more willing to get involved in wine tourism. As seen at Table 2, responses of all wine producers indicate that "additional sales", "brand loyalty" and "brand awareness" are important benefits of wine tourism for all wine makers. Wine tourism is seen a significant marketing tool - a way advertise their brand in wine industry – especially important due to advertisement restrictions on alcoholic beverage in Turkey. Although there are not statistically significant differences in perceived benefits according to the winery size, in relation to sale margin it appears that larger wineries more readily perceive this as a benefit in comparison to small ones. Likewise, in contrast to smaller wineries, medium and large ones are seeing advantages in terms of collecting customer information and reducing marketing cost. The results indicate, albeit only tentatively, that medium size wineries, in particular, perceive wine tourism to be of benefit to their marketing efforts. Larger wine producers emphasize that wine tourism provide a reduction of intermediary costs which are for large wineries significant due to the volume of wine produced.

Table 2
BENEFIT DIMENSION OF WINE PRODUCERS' PERCEPTION OF WINE TOURISM

Statements	Total		Small producers		Medium producers		Large producers		p-value**
	Mean*	SD	Mean	SD	Mean	SD	Mean	SD	
Brand awareness	4.52	0.510	4.50	0.527	4.60	0.516	4.40	0.548	0.764
Additional sales	4.36	0.810	4.50	0.707	4.20	1.033	4.40	0.548	0.278
Build brand loyalty	4.28	0.737	4.20	0.632	4.30	0.949	4.40	0.548	0.736
Increase sale margin	4.28	1.100	3.70	1.494	4.70	0.483	4.60	0.548	0.360
Opportunity to collect data about customers	4.16	1.068	3.60	1.430	4.70	0.483	4.20	0.447	0.265
Cash-flow	3.92	1.288	3.60	1.430	3.90	1.370	4.60	0.548	0.707
Decreasing marketing costs	3.84	0.800	3.60	0.516	4.20	0.789	3.60	1.140	0.194
Decreasing intermediary costs	3.64	1.036	3.40	1.075	3.60	1.174	4.20	0.447	0.394

*response on a 5-point scale, with 1=strongly disagree and 5= strongly agree

**Kruskal-Valis test of $p<0.05$

The third dimension under investigation is the opportunity dimension. Knowledge or awareness of the opportunities offered by wine tourism can provide competitive advantage for, both, a company and region. Responses of wine producers relating to perceived opportunities that involvement in wine tourism can provide are presented in Table 3. Larger wine producers are concerned with wine tourism and being in a wine tourism network. Larger wine producers agree that wine tourism is an important factor in attracting municipal and national government attention to wine industry. Responses of producers indicate that all groups of wine producers agree on the "contribution to development of wine industry", "support for development of wine producers" and "ensure competitive advantage for wine producers". In terms of the variation in response according to the winery size, the result of Kruskall Wallis H test show no statistically significant differences on any of the item related to the opportunity dimension.

Table 3
OPPORTUNITY DIMENSION OF WINE PRODUCERS' PERCEPTION OF WINE TOURISM

Statements	Total		Small producers		Medium producers		Large producers		p-value**
	Mean*	SD	Mean	SD	Mean	SD	Mean	SD	
Contribution to development of wine industry	4.48	0.714	4.20	0.919	4.50	0.527	5.00	0.000	0.573
Support to development of wine producers	4.40	0.577	4.40	0.516	4.30	0.675	4.60	0.548	0.187
Ensure competitive advantage for wine producers	4.24	0.663	4.10	0.738	4.40	0.699	4.20	0.447	0.736
Networks with tourism enterprises	3.92	1.038	3.90	1.101	3.80	1.229	4.20	0.447	0.678
Attract attention of municipal and national government to wine industry	3.72	1.275	3.20	1.549	3.90	1.101	4.40	0.548	0.265

*response on a 5-point scale, with 1=strongly disagree and 5= strongly agree

**Kruskal-Valis test of $p<0.05$

Summary and conclusions

As highlighted at the outset, Turkey has a tremendous wine history. First grape had been cultivated in Anatolia and wine had been essential for civilization in Anatolia 8000 years ago. Nowadays, Turkey is fortieth wine producer country in the world; although it is the sixth biggest grape production country in the world. Only 12% of grape production is used in wine production. Recently new investments and technologies are introduced to wineries and vineyards. Wine producer use latest technologies in their production process. Through these industry developments, there is a growing interest in wine tourism at wine regions and among the wine producers.

Last decade wine tourism has taken both industrial and academic interest. Wine producer regions, especially new world of wine countries have marketed their wine through winery visits. Visitations to wineries provide an opportunity to producers in the matter of introduce brand, additional sales, create brand loyalty and customer relationship. Wine producers are key elements of wine tourism, and an important determinant of wine tourism experience quality. Many wine producers are mostly concerned with production, and secondary with tourism. For this reason many wine producers consider visitation to wineries as extra costs. In this study, wine tourism perceptions' of wine producers were determined. The results of the study indicate that many Turkish wine producers have positive attitudes towards wine tourism. They believe that there are many advantages and opportunities of wine tourism to wine producers. Especially the large wine producers are favorable towards involvement in wine tourism. They state that networks with tourism companies and educational activities about tourism would be facilitated in their company. Most middle level producers are concerned with wine tourism due to its marketing effect. Like middle producers, small wine producers believe that their brand and promotional activities can be boosted by involvement in wine tourism. Wine producers in Turkey also believe that wine tourism can be of significant benefits to the wine industry overall development. They believe that attentions of many private and governmental organizations could be attracted with wine tourism.

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