# IMPROVING WINE TOURISM ACTIVITY OF SMALL-SCALE WINERIES IN CHIANTI, ITALY, DURING LOW SEASON

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# PREFACE

As part of the study program International Agribusiness at Aeres University of Applied Sciences, students must conduct a research linked to one of the courses taught in the program. This research results in a thesis, which is written during the placement. This report constitutes the final proof of proficiency of the study program undergone.

The topics of communication and wine tourism were chosen following my interest for these disciplines – I would like to have my future career in the wine industry. Moreover, as I was doing a placement in the Chianti area in Tuscany, Italy, this was a challenging subject to study in order to help small-scale wineries in developing their marketing communication strategy.

I would like to thank:  Mrs. Sintija Kuipers for her coaching during the placement, Mr. Patrick Burgess for his help during the year, and Mr. Alessandro Griccioli for the opportunity he gave me to work in his company.

# TABLE OF CONTENTS

# SUMMARY

Italy is the first wine producing country in Europe and the third most touristic European country. Indeed, Italy benefits from a worldwide renown both in wine and tourism. However, Italian regions do not share the same popularity, the top three is composed by: Veneto, Tuscany and Lombardy. From these two sectors has emerged one particular form of tourism: wine tourism; consisting in visits of wine estates and wine tasting, among others. Precisely, in Tuscany, wine tourism takes an important place thanks to the worldwide fame of the region and its wines. Wine tourism's development in Tuscany is strongly linked to the Tuscan agricultural history and has been seen as a diversification of activities to generate more revenues. However, wine tourism also suffers from decreasing number of tourists during the low season which is a problem when wineries' profits mostly come from tourists' purchases. Focus of this research was on small wineries as they do not benefit from the same renown as big historic wineries. Moreover, wine business is not anymore about production and sales but has been impacted by new consumption habits which now emphasize the importance of introducing wine marketing within the strategy.

Thus, the research aimed at answering a main research question: how to attract more tourists to small-scale wineries during the low season in Chianti area? Therefore, the research was further divided into four sub-questions about: who they are, in what are interested these tourists, how these tourists can be targeted and, finally, marketing tools to use so that small-scale wineries could be provided with concrete elements to improve their marketing communication strategy.

To find these elements, a survey was presented to tourists, desk research was used to provide literature review and a questionnaire was sent to marketing and promotion experts. It was found that low season tourists are mainly from Italy, USA and China, being motivated by Tuscan culture, wine and gastronomy. Moreover, wine tourists are usually highly educated, aged between 30 to 55 years old and have more than average revenues. Regarding communication channels, the main one to be presented by literature is digital with internet and social media channels as they enable companies to create interactions both with customers and potential customers. Results for marketing tools showed that storytelling, photographic languages, brand awareness, public relations and networking are important in wineries' strategy in addition to strategy differentiation according to a specific target group.

In conclusion, small-scale wineries should focus on the main origins (Italy, China and USA) coming during the low season to Tuscany as they represent a bigger target group. Moreover, they as well should target highly educated tourists, income level and involvement with wine as they are the most receptive to purchase. Digital communication channels (Internet and social media) must be part of the marketing communication strategy regarding their growing importance, but still paired with traditional channels (agencies, tour operators). Marketing communication tools to be implemented, are storytelling and wine production related photographic language. Wine experiences should be special for customers with meetings and tastings with the winemaker, or oenologist. Finally, the last recommendation is composed of the creation of network and partnership to implement public relations in the strategy of small-scale wineries.

# 1.  INTRODUCTION

As one of the most famous wine-producing countries in the world, Italy has been experiencing viticulture for a long period of time. Indeed, presence of vine-growing culture dates back to Antiquity (Silberman, 2012). Nowadays, Italy is the first wine-producing European country, ahead of France and Spain, in volume (OIV, 2017). From north to south, vines are cultivated and wine is produced according to strong ancient traditions. In fact, around 500 protected designation of origin can be enumerated (Qualitiva, 2017) thanks to a variety of terroirs, which can be described as zones where the interactions between a "specific soil, topography, climate, landscape characteristics" as well as human vitivinicultural practices provide specificity to the final product (Castellucci, 2010). Moreover, a DOC, Denominazione di Origen Controllata, or DOCG, Denominazione di Origen Controllata e Garantita, is a guarantee of quality and particular savoir-faire for a specific geographic area (IMT, 2011).

However, Italy is not only a country of wine but an important tourist destination as well. With 60 million of foreign tourists in 2017 (ANSA, 2018), this is the third European country with the largest number of international visitors after France and Spain (Statista, 2018) making tourism amongst the most important economic sectors for the country. Even so, the different regions of Italy do not share the same level of touristic attractiveness. Indeed, in terms of tourist visitations, Tuscany is the second most visited Italian region preceded by Veneto and followed by Lombardy (Eurostat, 2017).

Moreover, in Italy, one particular form of tourism has been developed during the last decades: wine tourism. This form of tourism can be described as follows: "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, Sharples, Cambourne, & Macionis, 2002). Consequently, this form of tourism is mainly developed in territories where there is wine production and gathers activities dedicated to the cultural discovery of vine, wine and terroir.

This form of tourism is particularly developed in Tuscany, especially in the Chianti area which is famous for its red wine. More specifically, Chianti is a DOCG situated between the famous cities of Florence, to the north, and Siena to the south (see Appendix 1). This designation is divided in seven sub-designations with their own distinctive features: Chianti Ruffina, Chianti Colli Fiorentini, Chianti Classico, Chianti Montespertoli, Chianti Colline Pisane, Chianti Colli Arentini and Chianti Colli Senesi (see Appendix 1). Nowadays, Chianti wines are known worldwide. Originally, however, they were seen to be of low quality because, amongst others, they were bottled in straw flasks, called "fiasco" (Steinberger, 2010). The evolution of Chianti wines has been made by the centuries of rich history of the region. Indeed, the origins of this wine can be dated back to the XIII and XIV centuries (Robinson & Harding, 2015) but the beginning of the Chianti designation was instituted by Cosimo III de' Midici in 1716 under the name of "Lega del Chianti" gathering villages which are now part of Chianti Classico DOCG (Robinson & Harding, 2015). Then, this area was further expanded in 1932 by the government (Johnson, 2001) and then again in the following years until having the actual delineation.

The development and history of Chianti wines is intimately linked with the history of Tuscany, mainly in the agricultural field. Indeed, Tuscany has a strong past of farming traditions and history (Johnson, 2001). A specific farming system had been established during the XIII century in the region, which was called "mezzadria", translated as sharecropping (Boutier, Landi, & Rouchon, 2004). This

system, based on polyculture, consisted in the establishment of a contract between two entities: a landowner, called "podere", and a farmer, "mezzadro". The farmer was entitled in cultivating the lands of the owner for, at the end, sharing the crops (Johnson, 2001). The sharecropping system had lasted until 1964 (Trivellato, 2007).  The agricultural goods were grapes, olives, fig trees and diverse cereals. Moreover, as part of the contract and to properly cultivate the land, the farmer had to live where the land was. Consequently, the place was structured so that the farmers' houses were close to the land and thus, close to the main villa (Perrin, 2008). However, because of the abolition of this sharecropping system, this led to a rural exodus and the desertion of farms (Cavet, 1967). Moreover, agricultural sector and viticultural sectors suffered a crisis in the 1970s, more specifically, the wine sector was hit by a reduction in consumption paired with an overproduction during the years 1973 and 1974 (Tirone, 1975). In order to respond to this crisis and generate more revenues, owners of land and buildings decided to diversify their activities. Thus, they renovated houses which were initially the farmers housing with the aim of renting them, mainly to tourists. This was the beginning of the "agriturismo", or agritourism which later developed into wine tourism. During the 1970s and 1980s, this trend has been strongly developed in Chianti region (Perrin, 2008).

At the beginning, these activities were mainly developed by big estates and then by smaller estates, which led to different types of accommodation and service level. Several associations emerged such as Agritourist in 1965 (Perrin, 2008), which then gathered into a Consortium, Anagritur, to promote their activities. At the same time, the expansion of this type of tourism was encouraged by the government through different laws, rural development plan and subsidies (Perrin, 2008). More specifically, concerning the viticultural sector and wine tourism, the associations which have been created are: Città del Vino and Movimento turismo del Vino. More recently, demand for wine has decreased due to new concerns and this trend confirmed the necessity of evolution and of the emergence of new practices (Asero & Patti, 2009).

Concerning Tuscany, Chianti is one of the most attractive zones thanks to its landscapes, architecture, location near important cities and its wines and gastronomy. Moreover, as mentioned earlier, they benefit from a great renown in Europe and Chianti wines are highly appreciated in United States. To enhance this reputation, the Chianti region strategy has been to highlight the heritage aspect of the wine, as part of the history and the culture of the region. This was done through the depiction of the know-how and Tuscan, or Chianti, way of life. In this way, the global communication has been elaborated with regard to the significance of the terroir, as described earlier, and its singularity from a place to another which is equally characterised by history and traditions (Asero & Patti, 2009). This approach is used by what is commonly named as Old-World countries for wine production, and are mainly European countries, in opposition to New-World countries which have no traditions but innovation, comprised of countries of the American continent, Australia, New Zealand and South Africa.

As mentioned before, wine tourism has been established in an attempt to diversify activities and, in this way, to attract more people on the estate and generate revenues. However, wine tourism is no exception to the law of low season and peak season which rules tourism in general. The peak season is commonly known as the summer season, but more precisely, from April to end of the August. Thus, the low season is from October to end of March (Poinelli, Papadimitriou, & Boussia, 2017). Indeed, tourists who will have a wine experience during their holidays are more numerous during peak season as this is the case for non-wine-oriented tourists as well. Their presence decreases during low

season at the same time of the global touristic affluence and consequently, business activity linked to tourism will decrease as well. Fortunately, Italy is a very touristic European country meaning that touristic affluence mainly, but not only, concentrate in the peak season. In fact, according to figures, the affluence peak is in July and August; and bed nights, for all combined types of accommodation, are between 5 and 6 million for July and August against around 1 million during the low season according to ISTAT for 2015.  This diminution of touristic affluence is problematic when tourists represent an important basis of potential customers and, therefore, potential revenues for companies relying on touristic activity. This is the case for small-scale wineries, as stated earlier, wine tourism is a diversification of company's activities and represents a possibility of generating additional incomes by attracting people on the estate. In addition to revenues made with different available experiences, such as wine tastings, lunch, visits of the estate for instance, this enables also to sell wines, or any other products sold by the winery, which is the ultimate objective of any company in production and marketing of agricultural products, and more specifically, wine.

Focus is on small wineries as they do not benefit from the same renown of big wineries. Additionally, this is important to define what constitutes a small-scale winery. However, there is no clearly stated definition for that. In this way, they will be described in opposition to big wineries which are mainly historic wineries such as Antinori, Mazzei or Frescobaldi wineries. Indeed, they are old families: Antinori family has made wine since 1385, Mazzei since 1435 and Frescobaldi since 700 years. They own several estates both in Tuscany and in Chianti Classico sub-area, as well as in other Italian regions. Moreover, prices of their wines can be higher than 100 euros. Finally, they benefit from a historical renown through the family name. On the contrary, small wineries have only one estate where vine planted surface is less than 50 hectares and a small production of maximum 50 000 bottles per year.

So as to preserve an average number of visits on wineries estates, this would be useful to study who are the tourists coming in the low season period in order to target them with the right marketing communication strategy.


Wine business is no longer only about producing wine because selling and marketing practices have changed after new consumption habits from customers have emerged. Indeed, currently, the customer has to be considered as the main focus instead of the product (Rouzet & Seguin, 2017). Moreover, wine marketing is evolving, and new trends have been emerging such as the incorporation of social media through digital marketing. In this way, the interest is to execute proper communication with the objective of catching potential customers attention amongst the consequent number of competitors (Viana, 2016).

More broadly, marketing is situated between "the organisation and its customers" (Blythe, 2012). It represents all the actions done in order to sell a product or a service at the end of the chain which are driven by a global company philosophy and resources management. Moreover, marketing is a sum of practices which enables a company, when properly conducted, to know its market and target its potential customers (Blythe, 2012).

To determine who will be targeted by the marketing communication strategy of the company, this is important to know consumers who can be potentially interested in the marketed product. This is done through customers analysis and finally, segmentation which is a way to concentrate company's

"efforts on pleasing one group of people with similar needs, rather than trying to please everybody" (Blythe, 2012). Furthermore, after segmentation, another marketing aspect is crucial. Consumer behaviour is another element to consider when elaborating a marketing communication strategy. Indeed, this is essential to understand what are the different factors influencing the buying decision such as perception or motives (Blythe, 2012). For instance, what are the motives which influenced somebody to choose between different types of holidays?

The aim of this research is to answer the following main question: How to attract more tourists to small-scale wineries during the low season in Chianti area?

Sub-questions included are:

- Who are the tourists coming to Italy during the low season?
- In what are these tourists interested in?
- How these tourists can be targeted?
- Which marketing communication tools can be adapted by small-scale wineries to attract these tourists during the low season?

This report aims at providing small-scale wineries with information about the tourists coming in the low season to Tuscany, Italy, and to the Chianti region so that they will be able to preserve an average activity and an uninterrupted income.

Indeed, the objectives are about finding the main origin(s) of these low season tourists, their main characteristics (age, personal situation, …), their areas of interests, their motivation and what communication means are the most appropriate to target these tourists. In this way, this will help small-scale wineries to properly target and attract these tourists and potential customers.

As touristic affluence decreases during low season, wineries will be provided with marketing communication tools to implement in their already existing marketing communication strategy and adapt to this specific low season period.

# 2.    MATERIALS AND METHODS

In order to answer the main question, the research was carried out following the different sub-questions which have a specific methodology.

For this research, both secondary and primary research were employed. Secondary research was desk research and consisted in a deep study and analysis of available literature related to the field of expertise of this report. Thus, as a whole, targeted reports and literature were tourism data in Italy and Tuscany and wine business researches with an importance of finding the most up-to-date data and information in order to have strong accuracy in sub-questions' answers. More specifically, were searched for: wine market studies, wine consumers behaviours studies, wine marketing studies, wine communication studies, digital marketing and communication studies, social media studies, wine case studies, etc. Moreover, documents provided by public organisations and associations in Italy concerning tourism and wine tourism were studied.

Primary research was based on qualitative method and consisted in interviewing professionals of the different sectors involved. This means professionals of tourism and wine sectors, both situated in Tuscany, Italy, and who could provide information about Chianti area. The targeted persons are further detailed in the sub-question 4 paragraph below. Moreover, in order to properly determine who are the tourists, they were interviewed as well. This was done in Monteriggioni castle. This place is situated between Florence and Siena, thus in Chianti area, on the dual-carriageway linking these two important cities. This castle is a medieval Tuscan touristic place where tourists are accessible and easy to approach. The survey was provided by paper or with a tablet. In order to answer with the tablet, a Google Form was created in order to gather the information automatically when saved by the interviewed person.

According to a Sample Size Calculator, and estimated number of tourists coming to Monteriggioni in October and November, around 2000 visitors, the outcome number of tourists to be interviewed is 300. However, due to time limitations, the targeted number of tourists is at least 100 persons. This can be explained by the fact that available tourists' population in Monteriggioni castle is decreasing. Moreover, research timing was short as the survey had been done over a duration of six weeks, from 15th of October to 23rd of November 2018. With 100 people interviewed, it would be possible to have an overview of the different profiles of tourists during the low season. Then, the results were completed by data from associations and public organisations.

This will be detailed further in this chapter with related sub-question.

*1)   Who are the tourists coming to Tuscany, Italy, during the low season?*

The significance of this sub-question lies in determining who exactly the tourists are during low season in Italy, and more specifically in Tuscany. Indeed, were searched for: country of origin, average age, personal situation and duration of stays. Personal situation focused on whether they travel in family, couple, alone or group of friends.

To provide an answer to this sub-question, first, desk research was used in order to study data provided by different statistics agencies and Italian public organisations related to tourism. Thus, documentation was retrieved from: data available with ISTAT (Istituto nazionale di statistica, to translate as National Institute of Statistics), data as well as studies and researches available on Centro Studi Turistici Firenze's website (Centre for Touristic Studies of Florence), data available with the Osservatorio Nazionale del Turismo, Regione Toscane and Osservatorio turistico of Siena (Touristic Observatory of Siena, data and studies available on ENIT's website (Azienda Nazionale Turismo, to translate by National Agency of Tourism), studies and researches available on Città del Vino's and Toscana Promozione Turistica's websites.

Then, this was completed through a survey provided to tourists coming to Monteriggioni castle from 15th of October to 23rd of November 2018. The questionnaire is provided in Appendix 2, where questions 1 to 5 are related to this first sub-question.

Answers to multiple-choice questions of the survey were analysed after having created a graph in order to see what are: the main origin, main age group, main personal situation, main duration of stay. Then, these graphs were correlated to each other meaning that origin variable was correlated to age group variable, etc. Concerning open questions, they were classified by similar reasons for the answers related to question 3. Then, it was possible to see destination choice justification by age group and origin. This was done with Access where data were entered to create a database and then, correlate the different variables.

Finally, data gathered from statistics and reports completed the results of research done on the field. The aim was to be able to develop a first profile of tourists coming to Tuscany during the low season.

*2)  In what these tourists are interested in?*

After having established a primary set of characteristics of low season tourists, this sub-question was about discovering the tourists' areas of interest. First, this consisted in desk research in the same way as the first sub-question. Data and reports related to tourism from statistics agencies and Italian public organisations which have been cited for the first sub-question were studied in order to collect information from the data they provide. Thus, documentation was retrieved from: data available with ISTAT (Istituto nazionale di statistica, to translate as National Institute of Statistics), data as well as studies and researches available on Centro Studi Turistici Firenze's website (Centre for Touristic Studies of Florence), data available with the Osservatorio Nazionale del Turismo, Regione Toscane and Osservatorio turistico of Siena (Touristic Observatory of Siena, data and studies available on ENIT's website (Azienda Nazionale Turismo, to translate by National Agency of Tourism), studies and researches available on Città del Vino's and Toscana Promozione Turistica's websites.

Then, key words were used in order to find studies and researches from other sources. They were: wine business, wine tourism, wine study, wine consumer, wine consumer profile, wine interest, tourists' leisure activities, tourists' areas of interest, wine tourist profile, wine tourist profile Italy, market segmentation.

Articles such as "Market segmentation in wine tourism:  a comparison of approaches" (Alebaki & Iakovidou, 2011) where they study wine tourist consumer profiles were studied.

Then, as a second step, primary research was used as well. The questionnaire provided questions about the tourists' motivations to come in Italy, and in Tuscany specifically, their areas of interest and leisure activities. As for the first sub-question, the questionnaire was given to tourists in Monteriggioni castle by paper or directly on a tablet thanks to a Google Form. The questionnaire is provided in Appendix 2, where questions 6 to 7 are related to this second sub-question.

At the end of this sub-question, it was possible to know who are these tourists from place of origin to motivations.

The analysis consisted in linking the answers of questions 6 and 7 to the answers of previous questions in order to complete preliminary profiles elaborated with the first sub-question. First, answers to questions 6 and 7 were analysed thanks to a graph in order to reveal which motivations and areas of interest and/or leisure activities are leading. This was done with Access where data were entered to create a database and then, correlate the different variables.

After this sub-question, low season tourists in Tuscany were known from origin to areas of interest.

### 3) How these tourists can be targeted?

The idea of this sub-question was to determine through which channels these tourists can be targeted. This was determined through secondary research. Desk research was carried out with literature review to gather information from previous researches about this subject. Wine marketing has been developed and researches have been carried out for wine marketing and wine communication in general and linked to customers. In this way, this was possible to find consumers' response(s) and behaviours to different communication channels, meaning the media, and ascertain which ones are to be emphasised by small-scale wineries. A communication channel is "the delivery vehicle" for a message (Murphy, 2010).

In order to find documentation, the key words used were: wine, wine marketing, wine marketing communication, communication channels, winery, consumers response, response to communication channels, comparison of communication channels, attitude, marketing distribution channels, marketing channels, wine business, digital marketing, traditional channels, new media channels.

Articles such as "Digital wine marketing: Social media marketing for the wine industry" (Viana, 2016) and "The Importance of Social Media from the Wine Marketing perspective" (Tomazic, 2017) were studied.

So, this consisted in analysing what are the communication channels presented in different articles and through different studies and listing communication channels which are the most effective for the different profiles which would have been elaborated with the previous two sub-questions.

### 4) Which marketing communication tools can be adapted by small-scale wineries to attract these tourists during the low season?

The strategy was divided in two steps. First, desk research and literature review were used in order to gather information from previous researches about this subject. Indeed, wine marketing has been developed and researches have been carried out for wine marketing and wine communication in general and most of the time, linked to the customers. This aimed to gather general information about marketing communication tools for wineries, and small-scale wineries in particular. For this, key words used were: wine business, wine marketing, marketing strategy, marketing communication strategy, communication of winery, marketing tools, communication tools, efficiency, accuracy, marketing study, marketing research, marketing communication study, marketing communication research, experience, customer satisfaction, wine image, wine brand.

Articles such as "Wine prestige and experience in enhancing relationship quality and outcome" (Loureiro & da Cunha, 2017) were studied.

The second step was to contact marketing communication managers of different public organisations and associations to focus and specify on Italy, Tuscany and Chianti situations. Indeed, as these associations oversee the promotion of wine tourism in Italy, Tuscany included, they were able to provide important elements about the marketing communication strategy to employ, or to adapt the present marketing communication strategy.

Associations are: Città del Vino, Movimento Turismo del Vino, Consorzio Vino Chianti Classico.

Public organisations include national or regional organisations promoting tourism, and/or wine tourism. In this way, were contacted: Agenzia Nazionale del Turismo, Osservatorio Nazionale del Turismo, Regione Toscana, Centro Studi Turistici Firenze.

For these associations, persons who were contacted are: from Città del Vino, Angelita Paciscopi, Regional Coordinator Tuscany, and Iole Piscolla, in charge of winetourism, both by email; from Movimento Turismo del Vino, the organisational secretary was contacted by email to have the person most competent in relation to the research's subject. Regarding Consorzio Vino Chianti Classico's website, only a phone number is provided, thus, the first contact was by calling in order to have a person in charge of marketing and communication in this association.

For concerned public organisations, persons who were contacted are: from Agenzia Nazionale del Turismo, Maria Elena Rossi, Director of Marketing Promotion, was contacted by email; from Osservatorio Nazionale del Turismo, the Editorial Office is the only contact available to ask for information; from Regione Toscana, was contacted the special agency Toscana Promozione Turistica by email to be put in contact with the person most competent in relation to the research's subject; Centro Studi Turistici Firenze was contacted by email.

In total, at least 8 persons should have responded to the interview. A list with the websites and contact details of mentioned associations, organisations and persons is provided in Appendix 3. The idea was to conduct semi-structured interviews with themes to approach and adapted following the knowledges, competences and answers of the participant. Subjects are: wine tourism related to small-scale wineries and marketing communication strategy, advices to small-scale wineries, marketing communication tools for small-scale wineries. Questions are provided in Appendix 4.

The analysis of the interviews consisted in determining categories and classifying similar responses into these different categories in order to result with specific marketing tools and solutions to provide small-scale wineries with.

The aim of this sub-question was to provide small-scale wineries with concrete marketing communication tools and actions to implement or to include in their existing marketing communication strategy in order to specifically target the low season tourists to come on the winery's estate.

# 3.  RESULTS

In this chapter, the results obtained during the research phase are presented per sub-question according to the methodology which was used and presented above in the Materials and Methods chapter.

Results from the survey, which was submitted to tourists from the 15th of October 2018 to 23rd of November 2018, are presented. In total, 105 answers were gathered. Results of desk research for the first and second sub-questions are also presented. Then, information retrieved from literature review is displayed for the third sub-question. Finally, interviews with marketing professionals of different agencies and literature review are transposed for the last sub-question.

## 3.1.  Who are the tourists coming to Tuscany, Italy, during the low season?

To answer to this sub-question, desk research was first used in order to gather data from statistics agencies which have been mentioned in the chapter Materials and Methods. First, data retrieved from the data bank on Tuscany's website, which is Regione Toscana, are available in Appendix 5. The most present origins are shown below in tables 1 and 2.

Table 1 Number of arrivals of Italian tourists in Tuscany for the year 2017 during low season per month (Regione Toscana, 2018)

| MONTHS YEAR 2017 | 01/ JANUARY | 02/ FEBRUARY | 03/ MARCH | 10/ OCTOBER | 11/ NOVEMBER | 12/ DECEMBER |
|---|---|---|---|---|---|---|
| NUMBER OF ITALIAN TOURISTS | 279 085 | 282 947 | 377 525 | 383 961 | 356 267 | 394 613 |

In table 1, numbers of arrivals of Italian tourists in Tuscany are presented for the year 2017 and the months, mentioned previously in the definition of low season: January, February, March, October, November and December. From the table 1, it can be seen that, at the end of the year (December), there were far more Italians tourists coming to Tuscany when compared to the beginning of the year (January). Indeed, the difference between January and December is almost 115 000 tourists.

Table 2 Number of arrivals of foreign tourists in Tuscany for the year 2017 during low season per month (Regione Toscana, 2018)

| MONTHS YEAR 2017 | 01/ JANUARY | 02/ FEBRUARY | 03/ MARCH | 10/ OCTOBER | 11/ NOVEMBER | 12/ DECEMBER |
|---|---|---|---|---|---|---|
| NUMBER OF FOREIGN TOURISTS | 220 915 | 230 860 | 365 186 | 673 870 | 289 316 | 229 989 |

In table 2 above, numbers of arrivals of foreign tourists in Tuscany for the year 2017, and the same months which have been mentioned previously for the first table. All countries are included, except Italian tourists. From the table 2, it can be seen that October is the month during which they were the most numerous and exceeded numbers of arrivals of Italian tourists. Indeed, the number of tourists in October is twice the numbers of each other month. Moreover, amongst the three months of the beginning of the year (January, February and March), there are far more foreign tourists coming to Tuscany in March when compared to January and February. The difference between March and January, for instance, is about 145 000 tourists.

Table 3 Number of arrivals of foreign tourists in Tuscany for the year 2017 during low season per country and per month (Regione Toscana, 2018)

| MONTHS YEAR 2017 | 01/ JANUARY | 02/ FEBRUARY | 03/ MARCH | 10/ OCTOBER | 11/ NOVEMBER | 12/ DECEMBER | TOTAL |
|---|---|---|---|---|---|---|---|
| Argentina | 5 694 | 5 636 | 7 047 | 12 674 | 5 950 | 2 765 | 39 766 |
| Australia | 6 647 | 2 288 | 3 467 | 12 720 | 4 000 | 6 325 | 35 447 |
| Brazil | 10 975 | 7 510 | 10 219 | 19 914 | 9 983 | 8 563 | 67 164 |
| China (including Hong Kong) | 36 563 | 34 349 | 41 580 | 64 042 | 39 724 | 31 964 | 248 222 |
| South Korea | 13 586 | 10 891 | 8 689 | 18 858 | 10 827 | 9 816 | 72 667 |
| France | 10 612 | 17 773 | 24 851 | 43 932 | 18 029 | 17 308 | 132 505 |
| Germany | 7 607 | 10 138 | 22 044 | 70 874 | 12 108 | 6 608 | 129 379 |
| Japan | 11 930 | 20 587 | 19 406 | 14 827 | 11 823 | 9 767 | 88 340 |
| United Kingdom | 8 684 | 12 665 | 19 083 | 35 571 | 12 049 | 8 370 | 96 422 |
| Russia | 10 862 | 7 339 | 12 232 | 15 946 | 10 277 | 7 801 | 64 457 |
| Spain | 12 285 | 14 112 | 21 560 | 27 614 | 15 135 | 17 118 | 107 824 |
| United States | 18 635 | 18 819 | 52 729 | 96 338 | 37 742 | 23 820 | 248 083 |
| Switzerland (including Liechtenstein) | 3 237 | 3 676 | 6 602 | 37 232 | 5 964 | 4 648 | 61 359 |

Number of arrivals in Tuscany of foreign tourists are presented in table 3 (above) for the year 2017 and, more specifically, from January to March 2017 and October to December 2017, which represent the low season, as defined previously in the introduction chapter.

As shown in table 3, the foreign tourists the most numerous in Tuscany during the low season are from China, USA, France, Germany and Spain. In addition, regarding table 1, Italian tourists are also important during this low season.

After desk research from data bank, a field survey was done and presented to tourists, in order to have direct knowledge of the profiles of these particular tourists coming to the Chianti region during the low season. In total, 105 answers were gathered. The questionnaire is provided in Appendix 2, where questions 1 to 5 are related to this first sub-question.

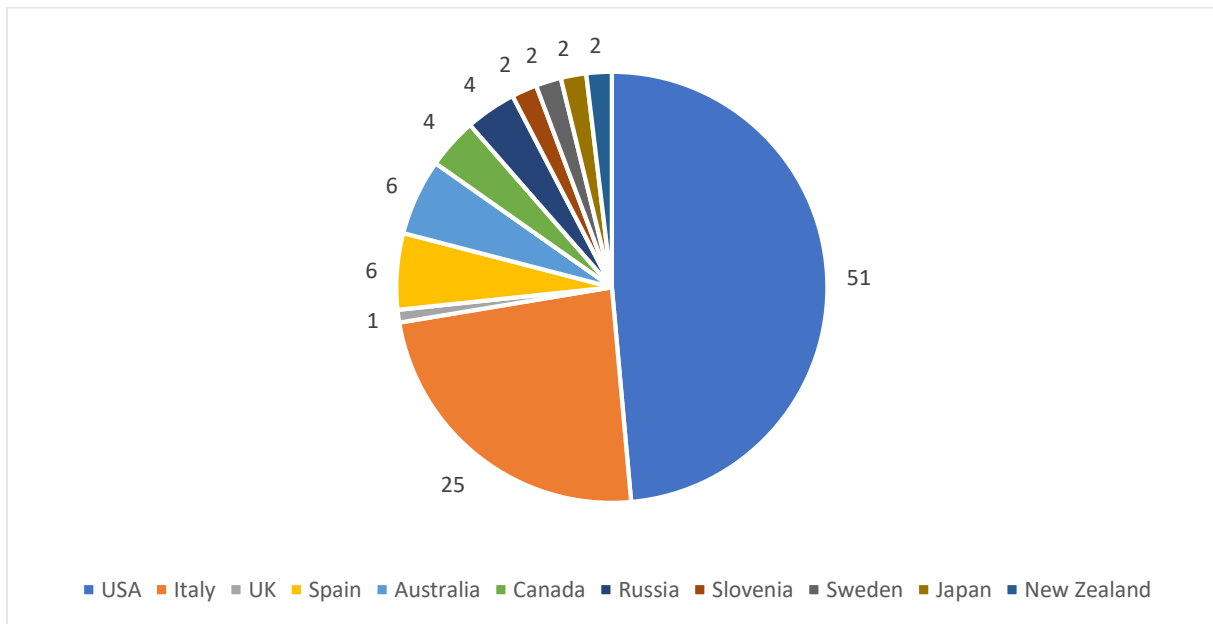Answers to the question "Where are you from?" are:



**Figure 1 Answers of the questionnaire per country of origin**

In the figure 1, some origins are not present as they did not get answer. They were: France, Germany and Brazil. The two main nationalities which answered to the questionnaire are US and Italian nationalities, representing almost three-quarters of the total answers' number. Then, there is no clear majority after these two nationalities.

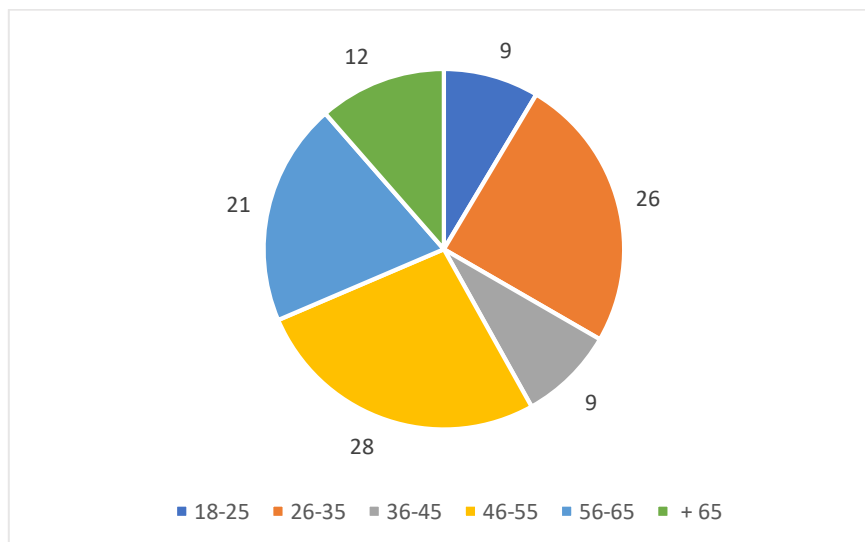Answers to the question "What is your age?" are:



**Figure 2 Answers of the questionnaire per age group**

As shown in figure 2, the three main age groups which answered the questionnaire are, in order from the biggest to the smaller one: 46 - 55 (27%), 26 - 35 (25%) and 18 - 25 (20%).

The possible answers to the question "What is your personal situation?" were "Single traveller", "Couple", "Family" and "Friends (group). No single traveller answered to the questionnaire

which leads to zero answer for this personal situation. Then, couples represent a majority of 54%, families account for 34% and, finally, people travelling with friends (in group) were 12%.

Answers to the question "Why did you choose this particular period?" are:
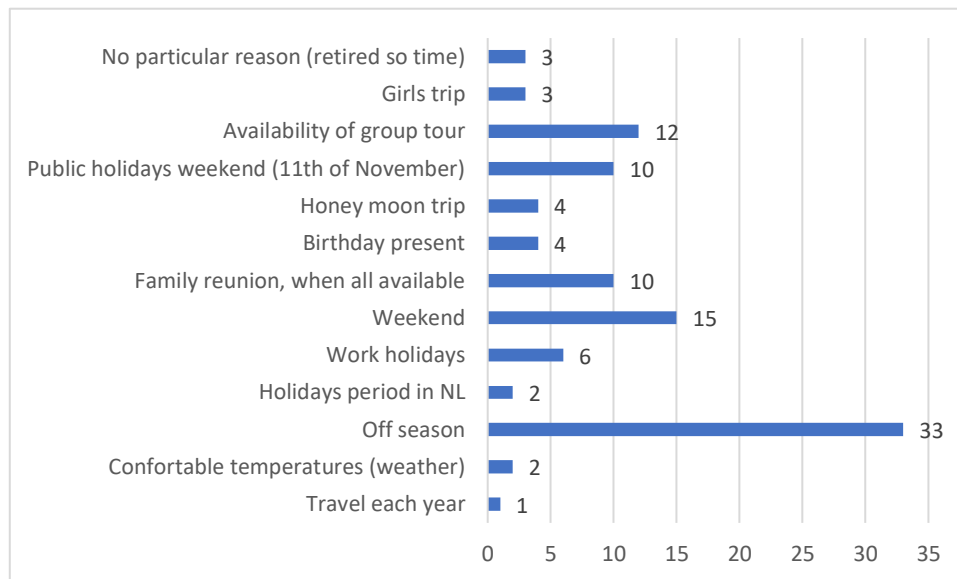


**Figure 3 Answers of the questionnaire per reason to choose low season period**

For this survey, where the results are presented in figure 3, as it was an open question, some answers have been gathered under the same labels. Indeed, they were written differently but they mean the same thing. Regarding answers, the main reason to choose the low season which has been selected by respondents is "Off season". Then, it is followed by "Weekend" and "Availability of group tour".
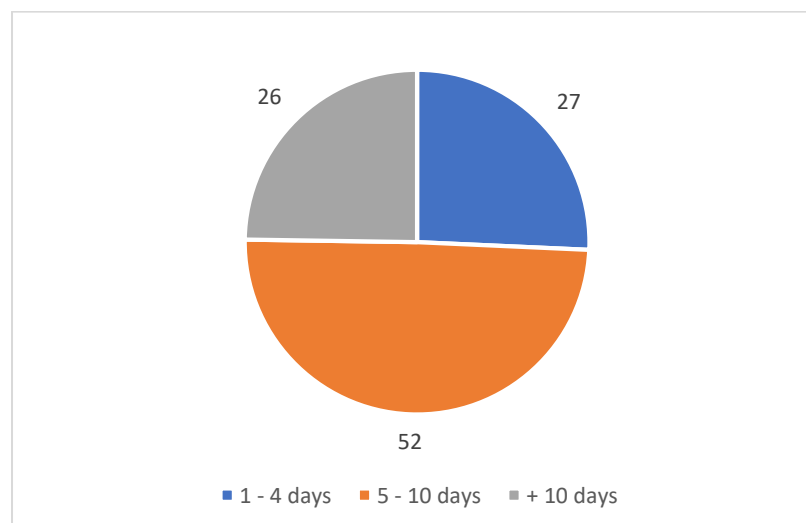


**Figure 4 Answers of the questionnaire per duration of stay**

Finally, answers to the question "What is the duration of your stay?" are 27 (25,7%) for "1 - 4 days", 52 (49,5%) for "5 - 10 days" and 26 (24,8%) for "+ 10 days" as shown above in figure 4. So, the majority of tourists came to Tuscany for 1 - 4 days.

## 3.2.     In what these tourists are interested in?

First, regarding the article "Market segmentation in wine tourism:  a comparison of approaches" (Alebaki & Iakovidou, 2011), they have studied wine tourists' profiles, as they consider wine tourism as a "form of consumer behaviour", in order to provide expertise in wine tourists' characteristics. Several wine tourist, or winery visitor, profiles are mentioned according to different references, as well as their motivations helping in segmentation. This provides a global overview of who and what are the wine tourists in general.

In this article, an important number of literature sources is studied. They make a comparison between younger and older respondents as their results displayed a difference in terms of expectation. Indeed, young wine tourists would place service quality and experience above wine quality. On the other side, older wine tourists would judge the product itself. A reason they justify by the fact that different age groups have different wine knowledge, expenditures and product involvement (Alebaki & Iakovidou, 2011).

Another research, entitled "Segmenting Wine Tourists on the Basis of Involvement with Wine", targeted winery visitors in order to "present alternative of wine tourists' profiles" along with their motives for visiting a winery (Nella & Christou, 2014). Respondents were mainly from Greece, USA, France, United Kingdom, Spain and Italy. In general, they had a high level of education, half of them had an average income higher than 1300€ per month and 39% were spending monthly more than 50€ on wine. Regarding winery visit, they were one third who never visited one and 41% who have visited in a group. Their main motivations were "acquiring information about specific wines, wine tasting, and experiencing the atmosphere of the winery" (Nella & Christou, 2014). Then, the research, according to answers, divided the respondents' group between three segments: low involvement, medium involvement and high involvement with wine. Main characteristics and motives of each segment are presented in the table below.

Table 4 Characteristics and motives of wine tourists' segments

| LOW INVOLVEMENT | MEDIUM INVOLVEMENT | HIGH INVOLVEMENT |
|---|---|---|
| - Mainly group visits<br>- Main reasons/motives for visiting a winery: experiencing the atmosphere of a winery, participating in a group visit<br>- Lower incomes and lower wine monthly budget | - Previous wine tourism experiences for 63%<br>- Main reasons/motives for visiting a winery: learning about wines, tasting new wines, enjoying a winery tour | - Previous wine tourism experiences for 93%<br>- More prone to on-site purchases<br>- Main reasons/motives for visiting a winery: wine tasting, buying, information and meeting the producer<br>- Higher incomes and higher wine monthly budget<br>- Motivations are wine-oriented |

After searching for general wine tourists' profiles information, data regarding tourists in Tuscany were researched. In the Tuscany Regional Survey made by Toscana Promozione Turistica, this

is possible to find a presentation of main destinations and activities in Tuscany with number of tourists attracted.

The first category is "Florence and the main cities of art in the region" which gathers Florence and neighbouring municipalities, such as Siena for instance. These areas are famous for their cultural and historic heritages. In 2016, these areas accounted for 15 million overnight stays, with two thirds in Florence.

The second category is "Spa towns", with Chianciano Terme and Montecatini Terme as main places, which accounted for 2.5 million overnight stays.

The third category mentioned by the report is "Hilly areas" which is described as the Tuscan countryside. They do not provide data about this category.

The fourth category is "Mountain tourist systems" with 1 million visitors a year.

The fifth, and last, category is "Bathing systems" which is represented by coastal destinations and receives most of the tourists in the region with about 40% of official visits.

After desk research, a field survey was done in order to have direct knowledge of the profiles and motivations of the tourists coming to the Chianti region during the low season. This was done through a survey presented directly to tourists. Answers to questions 6 and 7 are displayed below.

The possible answers to the question 6 of the survey, regarding motivations to come in Tuscany, were "Culture", "Wine and gastronomy" and "Resting" with the possibility of selecting several answers. Moreover, it was also possible to write another motivation with the answer "Other".

"Culture" is the first motivation with 86 answers followed by "Wine and gastronomy" with 66 answers and "Resting" with 9 answers.

Answers to the question "In general, what are your areas of interests and/or leisure activities? (several answers possible)" are:
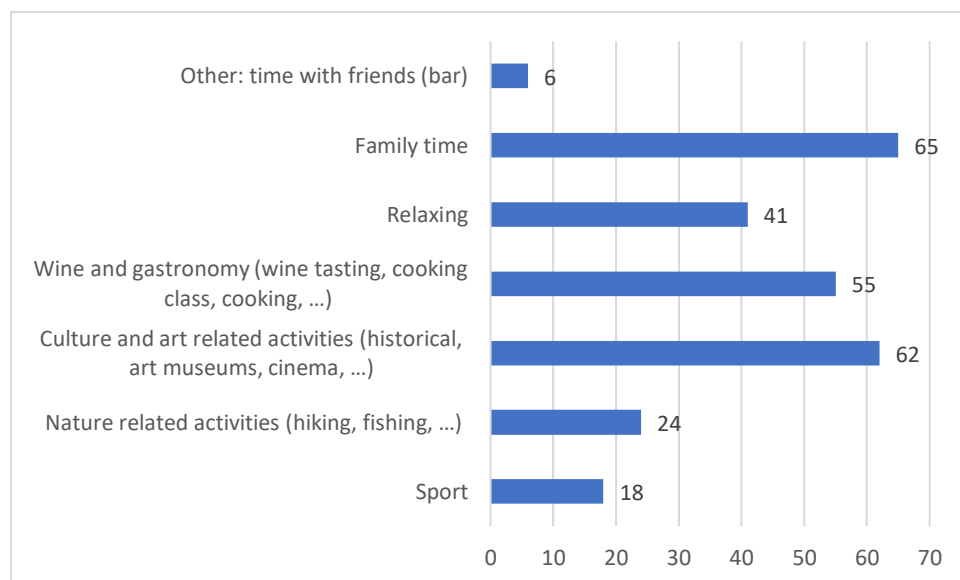


**Figure 5 Answers of the questionnaire per areas of interest and leisure activities**

For this question, the option "Other" gathered answers about having time with friends, thus they have been gathered into one label. There are four main tendencies which are, in order: family time with 65 answers, culture and related activities with 62 answers, wine and gastronomy with 55 and finally relaxing with 41 answers.

## 3.3.     How these tourists can be targeted?

To answer this sub-question desk research was carried out in order to provide a literature review about communication channels gathered from previous researches in relation to wine marketing.

The first article to be studied was "Digital wine marketing: Social media marketing for the wine industry" in which digital wine marketing and digital strategy for wineries is studied. In this article, there is an emphasis on a new challenging target group for wineries: millennials, who are between 21 to 34 years-old. The author states that they should be targeted using digital channels, including Internet channel and social media, as a channel as well. For "Online Advertising", the author mentions websites and "association/partnership with specific sites". For social media, the author gives the example of social media campaigns. She justifies the use of social media as this channel enables not only to deliver information to potential customers but to create interaction with them as well (Viana, 2016).

The second article, "The Importance of Social Media from the Wine Marketing perspective", also presents the importance of using social media as a communication channel for wine marketing. In the article, social medial are described as "as a service channel and channels of two-way communication in the marketing strategies of wine" (Tomazic, 2017). In this article, the author presents another possibility given by this channel which enables to "gather a detailed profile of each customer" such as "demographic information" and "shopping behaviour". Moreover, the author extends social media to the use of applications, platforms or sites that, at the end, create networks and conversations. As social channel, the author has listed: Facebook, Twitter, Instagram, Pinterest, Wikipedia, YouTube, TripAdvisor, Yelp as well as mobile apps. In this article, the existence of wine apps is mentioned where it is possible to create "advertisements, promotions, and coupons" (Tomazic, 2017).

A third article, "Using social media for consumer interaction: An international comparison of winery adoption and activity", was found. As visible in the article's title, this one advises as well to introduce social media as one of the main communication channels to use for a winery. However, authors state that the use of social media for each particular winery should be adapted to its target(s) and its strategy. They describe it as "a key channel for influencing and affecting wine purchase" (Szolnoki, Dolan, Forbes, Thach, & Goodman, 2018). Moreover, in this article, as there is a comparison between several wineries, there is also a mention of different channels: personal communication (face to face), post, phone or fax, email and newsletter. However, there is no mention of how these channels could be efficient.

A fourth article was found "The 2.0 Marketing Strategies for Wine Tourism Destinations of Excellence" mentioning digital and Internet channels with "sites maintained by local tourist organizations (national or regional)" for "reservation management tools". Moreover, in a part of the article entitled "Wine Tourism and the Web", it is stated that events such as wine exhibitions which are used by wineries as way for communicating, are "considered to be less effective" than what could offer and do agencies and tour operators (Scorrano, 2011).

Then, research of literature was more focusing on communication channels for tourism only, and not particularly wine tourism. In an article, entitled "Distribution channel in hospitality and tourism: Revisiting disintermediation from the perspectives of hotels and travel agencies", they compare two categories of communication channels: traditional channels and new channels. In "traditional channels", the authors focus on traditional travel agencies and for the new channels of communication, they include internet and mobile technologies. Authors showed that internet channel has gained importance. However, even if internet is becoming more and more important for booking services, they state that "some customers will still continue to rely on travel agencies to make reservations and purchase-related products and services". The difference which makes the difference is the offered service by traditional booking provided by a person, more personal and professional, than it could be by a website or mobile technologies (Law, Leung, Lo, Leung, & Hoc Nang Fong, 2015).

## 3.4. Which marketing communication tools can be adapted by small-scale wineries to attract these tourists during the low season?

To answer to this last sub-question, the methodology was divided in two steps. First, desk research was used with literature review to study what marketing communication tools are relevant and should be introduced by small scale wineries.

The first article to be studied is "Wine prestige and experience in enhancing relationship quality and outcome" where the authors mention "Tastes experience" as a "tool of marketing communication" in order to improve the "wine image in the tourists' mind" (Loureiro & da Cunha, 2017).

The second article is "Digital wine marketing: Social media marketing for the wine industry" which was used as well previously in the third sub-question. The relevance of this article for this sub-question is that the author provides marketing communication tools to use. The author mentions storytelling and explains that wineries should not only sell a product or a service but "a story to engage with". This must focus on consumers in order to attract them and connect with them, so they can feel to be part of the life of the winery. For this storytelling, the author develops the example of digital influencers with contents on their websites, blogs or other platforms, so they could act as opinion leaders (Viana, 2016).

The third article is "Different preferences for wine communication" where there is an enumeration of certain communication tools for wine. This research is about the reactions of wine professionals and both tourists and wine tourists regarding different attributes used as marketing communication tools in order to define the sensitivity of each group to particular tools. The marketing communication tools considered are attributes of product. The first thing that authors advise directly

to wineries is to "adopt separate attribute as marketing communication tools" to target different segments of potential customers. For general tourists, they found out that "photographic language" is more efficient while for professional operators "textual language" will have to be opted for. Regarding the images, they mention the closures and images "suggesting an approach to wine-production" including aspects such as "natural, historical and cultural". As effective and strongly persuasive tool, they have listed "the combination of viticulture and wine-making" with "landscape, history and culture" which can impact both tourists and professional operators (Sillani, Miccoli, & Nassivera, 2017).

A fourth article was found, "Innovative marketing behaviour determinants in wine SMEs: the case of an Italian wine region", and which provides readers with marketing communication and sales tools for winery to have in their strategy in their table (Contò, Fiore, Vrontis, & Silvestri, 2015). Information focusing on marketing of the table are summarized below in table 5.

Table 5 Marketing tools and description given in the article "Innovative marketing behaviour determinants in wine SMEs"

| MARKETING TOOLS | DESCRIPTION |
| --- | --- |
| Website | Hosting company information. Great tool for achieving notoriety. |
| Newsletter | Information and news from the company to customers or professionals. |
| Wine club | Shipping of wine several times a year. Reward for customers. |
| Wine events | In the cellar. Given examples are tastings, concerts, art exhibitions, conferences, book presentations… |
| Wine education | About production, wine tasting, wine pairing. |
| Mobile App | Facilitates knowledge circulation and extends relationship between wineries and final consumers. |
| Social network and Web 2.0 | Reduces distance between companies and consumers. Relationship between companies and customers. |

Further in the article, it was stated that "wine practitioners should place attention on wine tasting events and wine exhibitions". Indeed, these two elements will help to confirm knowledge about wineries' wine quality and contribute to word of mouth (Contò, Fiore, Vrontis, & Silvestri, 2015).

A fifth article, entitled "Economic and social aspects from social media's implementation as a strategic innovative marketing tool in the tourism industry", was found which specifically studied social media and community building for tourism destinations. Authors state that social media are linked to the creation of experience, in what they include "brand experience on the internet and the engagement of the consumer […] and people's active participation". Customers' engagement will help in building community belonging. The aim of this is to "both servicing and engaging customers" from companies' point of view. Moreover, using tools provided by social media will contribute to data exchange (Kavoura & Stavrianea, 2014).

Regarding wine experience itself, an article, "Enhancing Consumer Value in Wine Tourism", provides readers with the main attributes to be part of the wine tourism experience: "service encounters and the setting and surroundings". Authors precise these attributes with "staff knowledge,

ability, and skill in all aspects of wine service" in order to enrich customers wine experience (Carlsen & Boksberger, 2015).

In a sixth article, entitled "Wine tourism: a business opportunity for winemakers", authors study the state of wine tourism in South of Italy. In a first table, they provide their research's results about wineries' services, which are: individual visit, meeting with the wine producer, tasting with the oenologist, self-harvest, typical catering, local food sale, local artistic and handicraft products sale, snack bar, game/picnic area, hospitality (overnight), services for disabled people, tourism info, cooking lessons and, finally, special events. Then, there is another table which provides with communication tools used by wineries, which are: brochures, street signals, advertising on tourism guides, advertising on journal/radio/TV, advertising on internet, participation to events, wine fairs, tourisms fairs, organisation of events in the winery and participation to associations (Mancino & Lo Presti, 2012).

A new tool for communicating about experiences mentioned in "The new wave of tourism experiences in the sharing economy", is Airbnb experiences which have been implemented by the website in 2016. This recent tool is described as an innovation by the author. The concept is to become "experience host" with a local dimension and provide different activities and visits or tours to customers. The research showed that customers who already tried this type of experiences, mentioned their authentic aspect (Gardiner, 2018).

The second step was interviews with people working in the marketing communication fields at agencies and tourism associations. The questionnaire is provided in Appendix 4.

The first answer to the questionnaire is from Mr. Gherardo Noferi from the agency Toscana Promozione. Results of the questionnaire are presented below.

**Table 6 Marketing tools**

| | |
|---|---|
| **MOST EFFICIENT MARKETING TOOLS** | - Press office<br>- PR (Public relations)<br>- Social and networking |
| **MARKETING TOOLS FOR SMALL-SCALE WINERIES** | - Unconventional marketing<br>- Very punctual selected target<br>- Story telling (product, process, place, history, legend) |

In table 6, are presented marketing tools mentioned in the answers for questions 1 and 6. These marketing tools should be used by small-scale wineries. Moreover, Public Relations, presented in the section of table 6 entitled "Most efficient marketing tools", is the main to be emphasized according to Mr. Noferi with social strategy in parallel with something which could make people talk about. Then, advertising strategy was described as not the most adequate for small-scale wineries, but they should use unconventional marketing. Story telling is also one of the most important tools to be implemented in small-scale wineries' strategies, but it has to be different, from the competition, and interesting for tourists.

**Table 7 Ways of communicating**

| COMMUNICATION TECHNIQUES | Brand awareness | Using Chianti and Tuscany worldwide famous reputation |
| | Differentiation | Create a different service offer from competition |
| | Word of mouth | Thanks to good services |
| SHARED COMMUNICATION | Partnership with actors already promoting Tuscany and Chianti | Example: tour operators, bloggers, media |
| | Creation of a network | With other touristic points of interest. Example: B&B, museums, infopoint, … |

Table 7 gathers answers to question 2 which are about how small-scale wineries should communicate about their wine tourism activities or experience. For their communication, small-scale wineries should take advantage of Chianti and Tuscany worldwide reputation to create brand awareness. As lot of actors already promote the region, and the Chianti area, small-scale wineries should establish partnerships with these actors to put in place Public relations and beneficiate from their promotion. Moreover, small-scale wineries should also create a touristic network with other touristic points of interest, such as B&B, museums, infopoint, etc, that would connect different places. With good services and experiences presented to tourists, wineries could benefit from word of mouth from visitors who would be satisfied and advised the winery to their relatives, friends or colleagues.

**Table 8 Marketing communication strategy and target group**

| DO YOU THINK THAT THE MARKETING COMMUNICATION STRATEGY SHOULD BE DIFFERENTIATED FOR EACH TYPE OF TOURISTS? | YES |
| --- | --- |
| CRITERIA TO CONSIDER | - Motivation<br>- Timing<br>- Culture<br>- Background<br>- Use of media<br>- Different targets according to countries (examples: wine lover, old persons, friends, family, …) |
| WHAT TO DO | - Profile a main target<br>- Ensure an appropriate offer/service<br>- Determine the best tools to get the selected target |

In table 8 are presented elements obtained with the answer to question 4 regarding marketing communication strategy in relation to target group. The idea was to know if the strategy should be differentiated or not according to a target group. The answer is yes and completed with key elements to follow for elaborating the strategy. These key elements are first composed of criteria to strongly

study regarding the target group. Indeed, in order to build a proper offer for a specific target group, small-scale wineries must know as best as possible their motivations, culture, how they use media, … Moreover, the second key elements are about what is necessary to do for elaborating the marketing communication strategy. The first step is to profile a main target for which the second step will be to ensure an appropriate offer/service, according to the first key elements regarding motivations, etc. Finally, the third step will be to determine the best tools to get this selected target, regarding their use of media for instance.

# 4.   DISCUSSION OF RESULTS

The objectives of this research were about finding solutions for small-scale wineries in Chianti area to attract more tourists during the low season. For this, the idea was to find out who are the tourists coming in the low season to Tuscany, Italy, and to the Chianti region in order to preserve uninterrupted income. Research went from origins to motivations and marketing communication channels to tools to efficiently target these tourists and potential customers.

## 4.1.   Who are the tourists coming to Tuscany, Italy, during the low season?

This first sub-question was answered thanks to data collection both by desk research and a survey. Data from desk research were retrieved from data bank available on Regione Toscana's website.

This first part has enabled to find out what are the main nationalities to come in Tuscany during the low season: Italy, China, United States, France, Germany and Spain. Results of the survey, they displayed a majority of Italian and North American tourists. Regarding other survey's questions, it showed that tourists' age groups were mainly: from 46 to 55 years old, 26 to 35 years old and 18 to 25 years old. In terms of personal situations, "Couple" accounted for 54,3% of answers and "Family" for 34,3%. The first reason for choosing this particular period is "Off season", meaning less tourists for some of them. Finally, the main duration of stays was five to ten days with 52 answers over the 106 respondents, the other two durations of stays, one to four days and more than ten days, received almost an equal percentage of answers. Then, results have been specified to the two main origins, USA and Italy, in order to emphasize their main features. Results are as follows.

In total, 51 US tourists answered to the questions of the survey. They were the major origin of respondents.
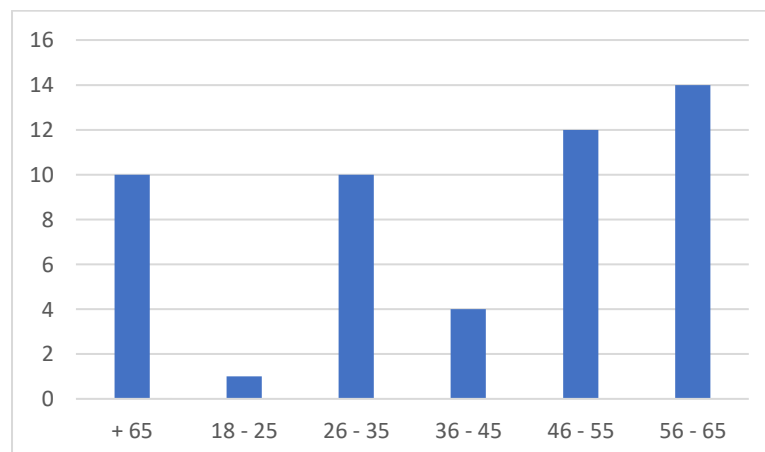


**Figure 6 Age groups of US tourists**

As visible in Figure 6 above, US tourists were mainly aged between: 46 to 55 years old, 56 to 65 years old and more than 65 years old. Another age group stands out: 26 to 35 years old.
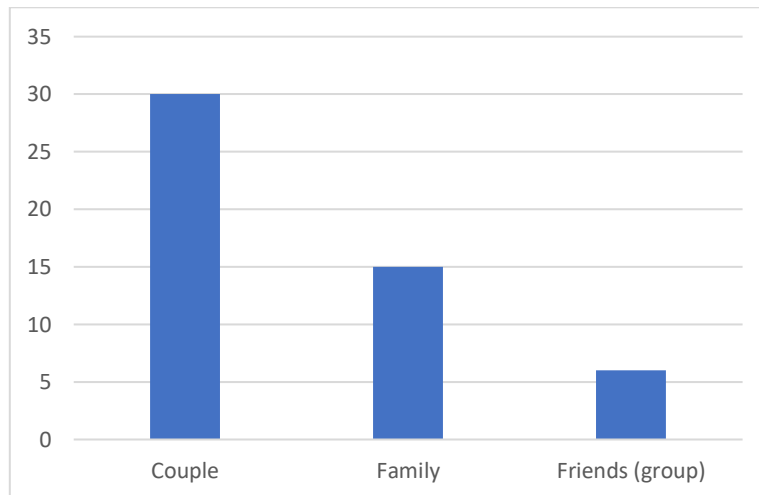
**Figure 7 Personal situations of US tourists**

In Figure 7 are displayed personal situations of US tourists where the answer "Couple" was the main to be chosen by US respondents with 30 answers.

Regarding US tourists' reasons for choosing this particular period, the reason "Off season" was mentioned 15 times and "Availability of group tour" was mentioned 8 times.
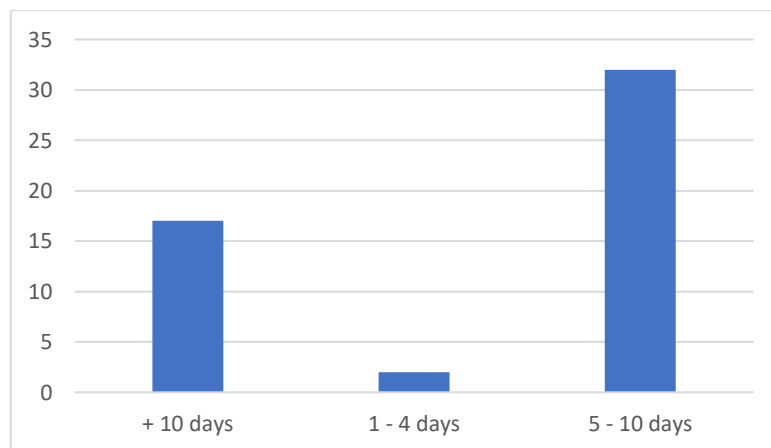


**Figure 8 Duration of stay for US tourists**

Regarding the duration of stay of US tourists, in Figure 8, their main duration of stay was five to ten days with more than 30 answers.

In total, 25 Italian tourists answered to the questions of the survey. They were the second main origin of respondents.

As visible in Figure 9 above, Italian tourists were mainly aged between: 26 to 35 years old and 46 to 55 years old.
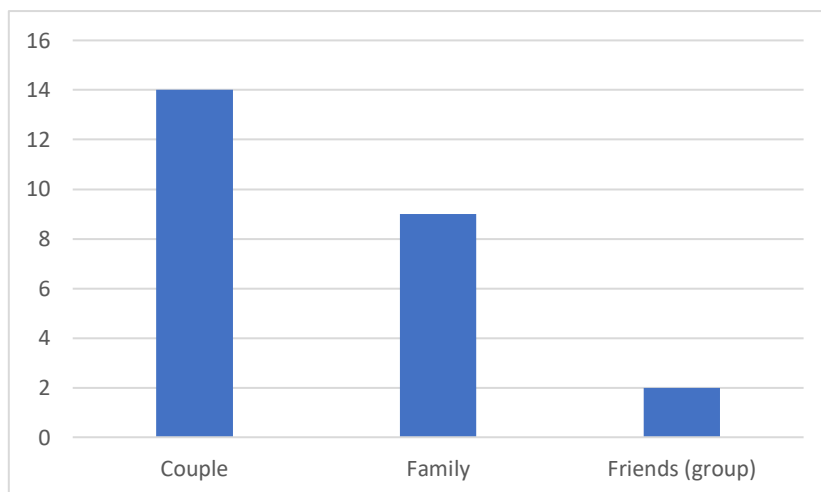
In Figure 10 are displayed personal situations of Italian tourists where the answer "Couple" was the main to be chosen by Italian respondents with 14 answers. The answer "Family" stands out as well with 9 answers.

Regarding Italian tourists' reasons for choosing this particular period, the reason "Weekend" was mentioned 9 times, "public holidays weekend" was mentioned 10 times and "Off season" 2 times.

**Figure 11 Duration of stay of Italian tourists**

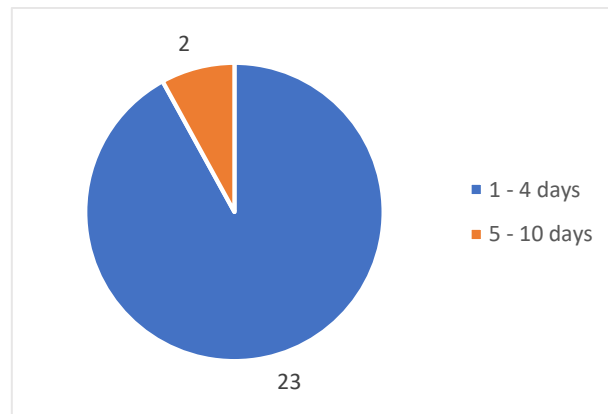Regarding the duration of stay of Italian tourists, in Figure 11, their main duration of stay was one to four days with 23 answers.

To summarize, regarding US tourists, they were mainly aged from 46 to more than 65 years old, travelling mainly in couple and staying five to ten days with main justification of choosing this period as "Off season" and "Availability of group tour". Italian tourists, on the other side, were mainly aged from 26 to 55 years old, travelling mainly in couple and family, and staying one to four days with main justification for the period as "weekend", "public holidays weekend".

When comparing results from the data retrieved from the data bank of Regione Toscana and results obtained with the survey, the origins which have been discovered do not perfectly match. Indeed, in the survey, no Chinese tourist was interviewed while they constitute, before US tourists, one of the main origins to come in Tuscany during the low season. Moreover, it could have been useful to find data about tourists' age from other tourism data bank, but this type of data was not available or non-existent.

Regarding the answer about the reason of choosing this period from Italian tourists, they mainly answered weekend and mentioned "Public holidays weekend" which was related to 11th of November, date of the 1918 Armistice.

Due to a short timing, at least 100 tourists were targeted by the questionnaire. The number of answers reached slightly more than the expected number which fits to the methodology plan. Moreover, the data retrieved from the Regione Toscana's data bank were the exact expected data to be found which helped in completing survey's results. However, some limitations to the research related to this sub-question can be pointed out. Indeed, time to present the survey to tourists was relatively short. More time could have given the possibility to obtain more answers and, thus, more insights about who are the tourists coming in this region. Origins could have been more diversified with other leading origins, different than USA and Italy as data from Regione Toscana revealed an important number of tourists from other countries.

## 4.2.    In what these tourists are interested in?

This second sub-question was answered thanks to data collection both by desk research and a survey. Data from desk research were retrieved from articles entitled "Market segmentation in wine tourism: a comparison of approaches" (Alebaki & Iakovidou, 2011) and "Segmenting Wine Tourists on the Basis of Involvement with Wine" (Nella & Christou, 2014), and from Tuscany Regional Survey made by Toscana Promozione Turistica. As a final step, a survey was presented to tourists in order to determine their motivations for choosing Tuscany and their areas of interests.

In the first article, it was found that, in general, wine tourists have a higher educational level and higher income in comparison to an average tourist, being aged between 30 to 50 years old and with no children. In comparison, in Italy, wine tourists are younger and mainly male. Then, they mentioned that there was a difference in expectation between young wine tourists, who are most toward quality of service and experience and old wine tourists, who focus more on the product and have more wine knowledge (Alebaki & Iakovidou, 2011). In the second article, they made a comparison between three different profiles of wine tourists according to involvement with wine which showed that tourists with low involvement have lower budget to spend in wine and are more interested by a group visit to experience winery atmosphere and not wine itself. In opposition, tourists with high involvement have a higher budget to spend in wine and their main motivations are turned toward the wine, wine tasting, buying and meeting the producer (Nella & Christou, 2014). The Tuscany Regional Survey showed that main destinations in Tuscany are "Florence and the main cities of art in the region", "Spa towns" and "Bathing systems" (coastal destinations).

Regarding the results of the survey for motivations to come to Tuscany, in general, respondents choose "Culture" and "Wine and gastronomy" in majority. Concerning, respondents' areas of interest, "Family", "Culture", "Wine and gastronomy" and "Relaxing" were the four tendencies. When focusing on US tourists, they mainly chose "Cultural" and "Wine and Gastronomy" as reasons for coming to Tuscany. Their areas of interest, on the other side, are mainly "Family time", "Culture" and "Wine and gastronomy". Italian respondents answered the same reasons as US tourists for coming to Tuscany. Their main areas of interest are "Culture", "Wine and gastronomy", "Family time" and "Relaxing".

Then, results have been specified to the two main origins, USA and Italy, in order to emphasize their main features. Results are presented for question 6 in the following tables.



**Figure 5 Motivations for coming to Tuscany of US tourists**

In Figure 12, US tourists' motivations for coming to Tuscany are represented. The two main reasons are "Cultural" and "Wine and Gastronomy". US respondents chose mostly the couple "Cultural" and Wine and Gastronomy" as motivations more than each one alone.



**Figure 6 Areas of interest of US tourists**

Figure 13 represents areas of interest of US tourists. It was possible to tick several choices to answer to the question 7. Results are each area of interest with the number of times they have been chosen by respondents. "Family time" received more answers than other choices with 34, followed by "Culture" with 28 answers, "Wine and Gastronomy" with 26 and finally "Relaxing" with 22 answers.
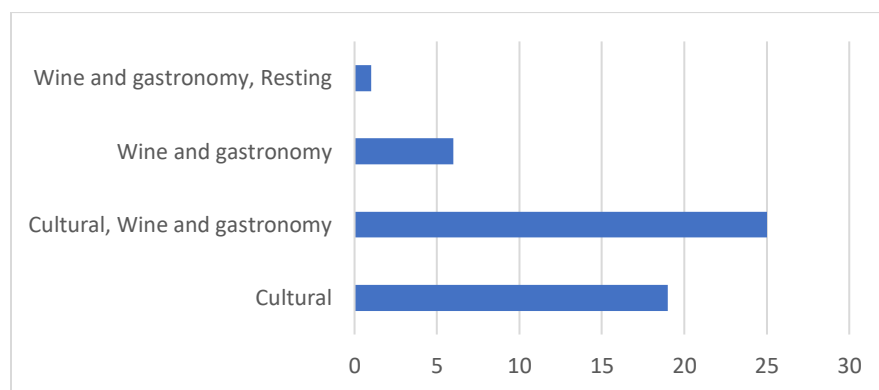


**Figure 7 Motivations for coming to Tuscany of Italian tourists**

In Figure 13, Italian tourists' motivations for coming to Tuscany are represented. The two main reasons are "Cultural" and "Wine and Gastronomy".
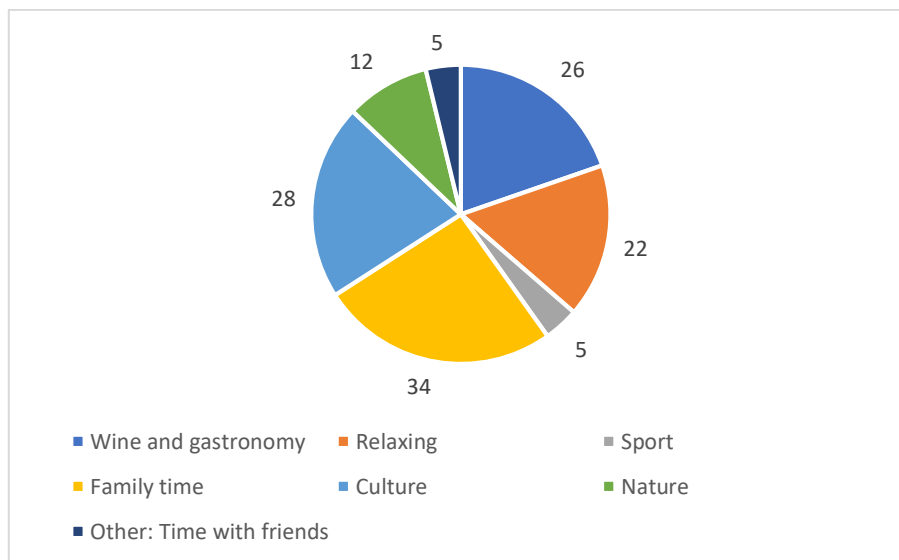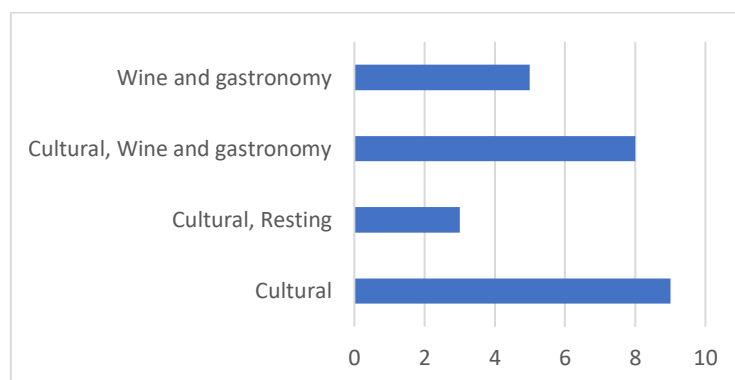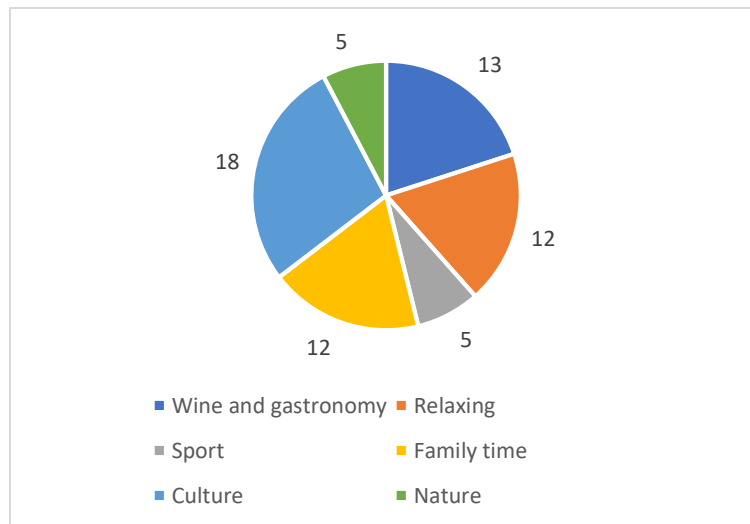
**Figure 8 Areas of interest of Italian tourists**

Figure 15 represents areas of interest of Italian tourists. It was possible to tick several choices to answer to the question 7. Results are each area of interest with the number of times they have been chosen by respondents. "Culture" received more answers with 18, followed by "Wine and Gastronomy" with 13 answers. Then, "Family time" and "Relaxing" received an equal number of 12 answers.

Moreover, in the article "Market segmentation in wine tourism: a comparison of approaches" (Alebaki & Iakovidou, 2011), there is a presentation of different researches which show the main characteristics of wine tourists in different countries. In New World countries, researches concede that wine tourists have a higher educational level and higher income level comparing to an average traveller. Moreover, one of the studies mentioned in the article described wine tourists as being aged between 30 to 50 years-old, with higher income and originate from, or being close to, a wine region. Usually, these tourists do not have children. Some other researches showed that wine tourists were mainly female but still with the same important level of income and education. In opposition, in Italy, a country of the Old World, wine tourists are predominantly male. The levels of income and education were not studied through the survey. However, regarding the average age provided in the article, it matches the main age groups which were found with the survey, meaning 46 to 55 years old and 26 to 35 years old.

Regarding the methodology of the survey, as mentioned previously for the first sub-question, the questionnaire could have been presented to tourists over a longer period of time in order to obtain more answers. However, as questions 6 and 7 were multiple choice questions, they had pre-defined answers. In this way, the sixth and seventh questions could have been open-questions. For instance, question 7 would have been something like "What do you like to do during your free time?" and tourists would have written the answers themselves. This would have enabled to get more diversified and more personal answers from respondents, as a more qualitative-oriented research.

As literature did not provide enough precise information about tourists' motivations, this was a positive point to complete it with the survey. Indeed, information obtained with desk research, mainly about tourists in Tuscany, was not enough to correctly having insights of tourists' motivations and factors attracting tourists in Tuscany. At least, with the survey, it provided information about main factors which are the culture and the gastronomy paired with wine. However, it was interesting to find

elements about wine tourists in general and what are their motivations and who are the most wine oriented according to sociological characteristics such as education level and incomes. Moreover, determining that different tourists' age groups have different expectations from wine experience and wine in itself brought an important aspect to consider when further defining its target group according to winery's offer in terms of experiences.

Concerning wine, it should be mentioned that, in Tuscany, Chianti wines are not the only ones to exist as protected designation. Indeed, other well-known wines such as the Brunello di Montalcino or the Vino Nobile di Montepulciano are as well Tuscan wines but not part of the Chianti designation. So, when tourists answered that they were motivated by wine, survey did not get precisions of either it was an interest in Chianti wines or for the others.

## 4.3. How these tourists can be targeted?

This third sub-question was answered with desk research in order to accomplish a literature review about communication channels in relation to wine marketing that could be used by small-scale wineries. For this, several articles were studied.

The main findings of this sub-question are about digital channels and social media. Indeed, the first article stated that Millennials (21 to 34 years old) should be targeted using these digital channels both Internet channel and social media. The second article also displayed the importance of social media channel in wine marketing as a two-way communication channel for the creation of interaction with customers. Social media also help in gathering data about consumers or potential consumers. In the third article, social media is advised but with the advice of adapting them according to target groups. The fourth article presents digital channels such as websites and reservation management tools and more traditional channels, but still efficient, such as agencies and tour operators. The last article was focusing on tourism in general comparing internet and mobile technologies channels with traditional channels as travel agencies: even if internet is gaining in significance, travel agencies will still be used by certain customers as the service provided is of a higher quality, professionalism and more personal.

Regarding the results, most of the literature was concerning social media channel and only a few literature references were available for traditional channels which rather limits the scope of this sub-question. Moreover, even if there was a mention of traditional channels in the articles, it was most of the time in comparison to social media and internet channels. It could be stated that, when looking at the important amount of articles about digital communication channels, this is a key element revealing the significance of implementing them in winery's marketing communication strategy.

In order to compensate this lack of results about traditional communication channels, the methodology used to answer to this sub-question could have been done in two steps similarly to the fourth sub-question, with both desk research and questionnaire to professionals in promotion and marketing communication.

## 4.4. Which marketing communication tools can be adapted by small-scale wineries to attract these tourists during the low season?

This fourth and last sub-question was answered both by desk research and literature review and a questionnaire with marketing professionals from associations and agencies both in Italy and Tuscany. The aim of this question was to provide small-scale wineries with marketing communication tools to implement their strategy.

Marketing communication tools which have been found are tastes experiences, storytelling, digital influencers (blogs, websites and other platforms), photographic language to target tourists. Images should be about wine production with historical, natural and cultural dimensions to be considered. Other tools were provided by another article: website, wine club, wine events, wine education and mobile apps. Regarding the experience itself, service quality and skills level have to be high, so the experience can be rich for the customers. In this experience, can be included a meeting with the winemaker and a tasting with the oenologist so the wine tourist feels special. Tools used by South Italian wineries are both traditional tools such as brochures, advertising on tourism guides and participation to events (wine and tourism fairs). The newer and more innovative tool provided by the literature was the Airbnb experiences.

Regarding elements obtained thanks to the interview, several marketing tools and communication techniques have been provided such as, for the most important, PR and storytelling. Regarding communication, it was stated that they should create partnership and network as well as using brand awareness. Finally, marketing communication strategy has to be differentiated regarding the target group.

Desk research was rich of literature providing information regarding what tools should be used by wineries and gave interesting and practical solutions. However, articles were not specifically focused on small-scale wineries. Moreover, regarding the questionnaire addressed to marketing and promotion professionals, it did not get as many answers as expected. Indeed, in total, the expected number of interviews was, at least, eight answers. Interviews were expected to be done by phone call. Only one person answered to the questionnaire by email. Two other professionals had accepted to answer to the questionnaire by email, and not by telephone, but they did not send back their answers even after several reminders. Due to this lack of answers, there is no possibility of comparing the results of the questionnaire and having several points of view regarding different marketing communication tools and marketing communication strategies to implement. Moreover, more answers to the questionnaire would have implement the reliability of the information obtained with the interviews such as determining more precisely the necessity, or not, of a specific marketing communication tool, channel or strategy.

Regarding this research, it makes available diverse elements on several strategic aspects for wine tourism and marketing communication to small-scale wineries. Indeed, they now have insights about low season tourists' profiles which they could use to define their target groups and thus specify their marketing communication strategy. However, they could as well complete these results with consumer behaviour study for each main origin (China, USA and Italy) in order to know their cultural features, their use of media and other specific characteristics. Furthermore, the target group of this

research can study what is the best communication channels for their strategy according to the results and consider the importance of digital channels. Moreover, this research provides an important list of marketing communication tools that small-scale wineries can use. This is not mandatory to implement all listed tools, or elements, but they could examine which ones should be implemented as a priority and which one could be the most efficient for them with regards to potentially increase their low season visitations.

# 5.  CONCLUSION AND RECOMMENDATIONS

In Italy, wine tourism is a strategical activity for wineries, and particularly small-scale wineries, as it constitutes a considerable source of revenues occasioned by tourists' winery visitations. The significance of this sector is profoundly linked to Italy's first position in European wine production and touristic worldwide popularity. Throughout Italian agricultural history, this form of tourism has been developed in order to compensate different crisis and diversify agricultural activities. Thus, by using existing infrastructures and taking profit of Italy's cultural background, wine tourism has been extended to promote wineries and their wines. However, as for general tourism industry, wine tourism also suffers from the law of low season which drastically reduces activities from October to end of March. For that reason, this research paper aimed at answering to: how to attract more tourists to small-scale wineries during the low season in Chianti area? The focus was put on small-scale wineries as they do not beneficiate from the considerable popularity of big historical Chianti wineries. The global objectives of this paper were divided into four sub-questions to find out the profile(s) of tourists coming to Tuscany during this specific period, their interests and motivations and then, regarding marketing communication, the most effective communication channels and marketing communication tools to implement in their strategy; with the aim of preserving an average activity and income.

During the low season in Tuscany, the three main origin groups of tourists are from China, Italy and United States with an average age situated between 30 to 55 years old and average length of stay of 5 to 10 days. They are mainly travelling in couple and are motivated by culture, wine and gastronomy. Moreover, in general, wine tourists have a higher educational level and higher income and, if they are highly involved with wine, they are the most inclined to purchase.

Regarding the communication, it starts with the channels to use. The most strategical channels to implement, which were concerning most of the literature, are digital channels, including Internet and social media seen as potentially the most profitable if well implemented in the marketing communication strategy as it creates interaction with potential customers and actual ones. Nevertheless, traditional channels are still considered to be important, such as travel agencies and tour operators, as some tourists will always want personal direct contacts and a high service level.

Marketing communication tools were diverse, but the main ones are, first, an original storytelling and photographic language which should be wine production related addressing historical, cultural and natural aspects. Events also constitute an important tool with wine and tourism fairs but also events in the cellar. Wine experiences should seem unique to customers and special with, for instance, tastings with the wine maker, or oenologist, paired with a high-quality service and skills. Finally, public relations development represents a significant step for wineries with creation of partnerships (press, bloggers, …) and networks with other touristic places.

In conclusion, to attract more tourists during low season in Chianti area, small-scale wineries must focus on specific origins of tourists and adapt their strategy by implementing the most adequate tools and channels of marketing communication. The primordial steps are to introduce a social media strategy within the global marketing communication strategy and to forge relationships with different actors to gain more efficiency in the strategy. Results achieve the objective which were predetermined at the beginning of the research in a sense that key elements were retrieved and will be useful for

small-scale wineries to improve or better focus their marketing communication strategy. Indeed, they are now provided with low season tourists profiles, key communication channels and marketing communication tools provided both by peer-reviewed literature and a marketing and promotion professional. This research can help small-scale wineries as it provides them with clear and practical solutions and

To further complement this research paper, it could be interesting to study consumer behaviours according to each target groups, or origins, mentioned in the paper, to gain more insights and better adapt the marketing communication strategy and wine experiences portfolio.

Following this research, the recommendations are:

- Small-scale wineries should specifically target tourists from the most present origins who come to Tuscany during the low season meaning Italy, China and United States. As they are the most present tourists in this specific period, they represent bigger potential target groups. Even if American tourists travel mostly in couple, most of them do it via tour operators. This is the same for Chinese tourists who travel via tour operator, by group and bus. Thus, in order to reach them, small-scale wineries should try to contact tour operators, both American and Chinese, and build partnerships with them to be included in the tour as an attraction. Examples of tour operators: JiliTour (Chinese), Nancy Aiello Tours (Chinese), Collette (American), Tuscan Escapes, …;

- They should offer a high-quality level of service (staff's knowledge and skills) and experience as it is seen as an important criterion according to wine tourists' expectations. Skills concern the importance of properly serving the wine. Indeed, wine should be served like a sommelier: avoiding any wine drop from the neck of the bottle as it could stain customers' clothes by wiping the bottle neck with white towel after each glass served, not pouring too much wine in the glass as tasting dose are usually quite low and, finally, the person in charge of the wine tasting should serve himself/herself first to taste the wine and be sure that the wine does not have any defect. Concerning the small-scale wineries' experiences, they should offer experiences which integrate customers into the life of the winery in order to provide them with intimacy, typicality, Chianti's culture, way of life and authenticity. This could be done through individual visits, meeting and wine tasting with the wine producer and/or the oenologist, self-harvest or wine making experiences, cooking classes, overnight hospitality, typical Tuscan catering and wine events in the cellar. Small-scale wineries should include the cultural and gastronomic aspects in their experience as they are the main motivations of tourists. Moreover, these elements could as well contribute to the storytelling of the winery;

- They could put these experiences using "Airbnb experiences" tools. On Airbnb, it is possible to publish experiences or activities (visits, classes, photo session, …). The host, here a small-scale winery, has to create a page which will be the experience with all the details of what is included. First, small-scale wineries must create an original and appealing title paired with a qualitative photography which has to be attractive to the eyes of Airbnb customers. Then, on the page, several pictures can be added. In addition, elements which

have to be indicated are: place and duration of the experience, languages in which the experience can be presented, host presentation, experience's program, extra information and what is provided (equipment, food, drink, surprise gifts…). Host presentation and experience program must be written with enthusiasm and be appealing for the readers. Moreover, when Airbnb users have done the experience, they are asked by Airbnb to answer some questions to give their opinion about the experience which are then published on the experience's page;

- However, they should continue using traditional communication channels: brochures, advertising on tourism guides, wine exhibitions such as Sangiovese Purosangue in Siena, tourism fairs, travel agencies, street signals, etc;

- In order to implement an efficient communication, small-scale wineries should establish partnerships with specific sites such as travel agencies to promote their experiences and partnerships with media or bloggers to promote the winery in general. In order to have promotion from media, the winery could organise a yearly event (harvest, vintage of the year, anniversary of the winery, …) in the cellar where will be invited the press and bloggers. Journalists should be provided with housing and food in exchange of an article. It could be journalists from local press or wine magazines (Decanter, …). This could represent a budget to carefully determine before starting the organisation of the event. Regarding travel agencies, this is similar to tour operators mentioned in the first recommendation. Small-scale wineries should try to establish partnership with travel agency by being part of the travel they organise as an option asked to the customers.

- They should as well create a network with other touristic points of interest (museums, B&B, …). For instance, they could be associated with B&B which would promote the winery as a top and typical experience to do in the area. Regarding museums, small-scale wineries could create touristic roads representative of Chianti, where can be added restaurants as well, historic monuments, ... So, when tourists go to the museum, or restaurant, they will be then advised to go to the winery, and vice versa. Small-scale wineries, when contacting these companies, should ask for an agreement about a two-way communication and promotion (reciprocity);

- Regarding the communication content, small-scale wineries should work on their storytelling, or if they do not have implemented it yet, should create it. Their storytelling must be unique, original, convincing and attracting for potential customers;

- Regarding communication channels, small-scale wineries should use digital communication channels: Internet and social media, keeping in mind that social media strategy should be adapted to the target group(s). Social media have to be used to create interaction with potential, or actual, customers of the winery. They have to be used to keep people informed about the life of the winery and contribute to its communication by promoting the winery, the experiences and the wines. As interactions will result from certain posts, feedbacks/opinions from customers will also contribute to the renown of the winery. This has to be done, on social media, with regular posts. However, even if the

best is to publish a post every day, posts must stay qualitative and interesting. It should not be a compulsive posting which could lead to a diminution of the quality of the content. Furthermore, small-scale wineries should plan the posts they will publish which means to have a strong organisation. Apps like Later, Buffer, Hootsuite, Crowdfire, etc., are important tools to start using in order to schedule posts in Facebook and Instagram and provide tables for analysing data (likes, time when it is best to post, when there is more interaction, …) which depends on which version the winery will take, free or not;

- Moreover, they should focus on photographic language to target tourists, as it has been seen to be the most efficient way to get their attention and create an emotion. Thus, images should concern all aspects of wine production as well as landscape (surroundings), history and culture. This photographic language should be used on the website as a well-designed will give a first good impression about the winery and on social media such as Facebook and Instagram. Indeed, high qualitative and well-designed pictures are crucial on Instagram as captions are usually short. For social media, photographic language will be transposed into posts. On the website, there will be illustrations and pictures for the "News" section if existing. It can be also used on more traditional channels such as posters in the touristic points of interests mentioned previously such as restaurants, hostels, B&B, tourism office and museums.

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# APPENDIX 1 – Map of Tuscany
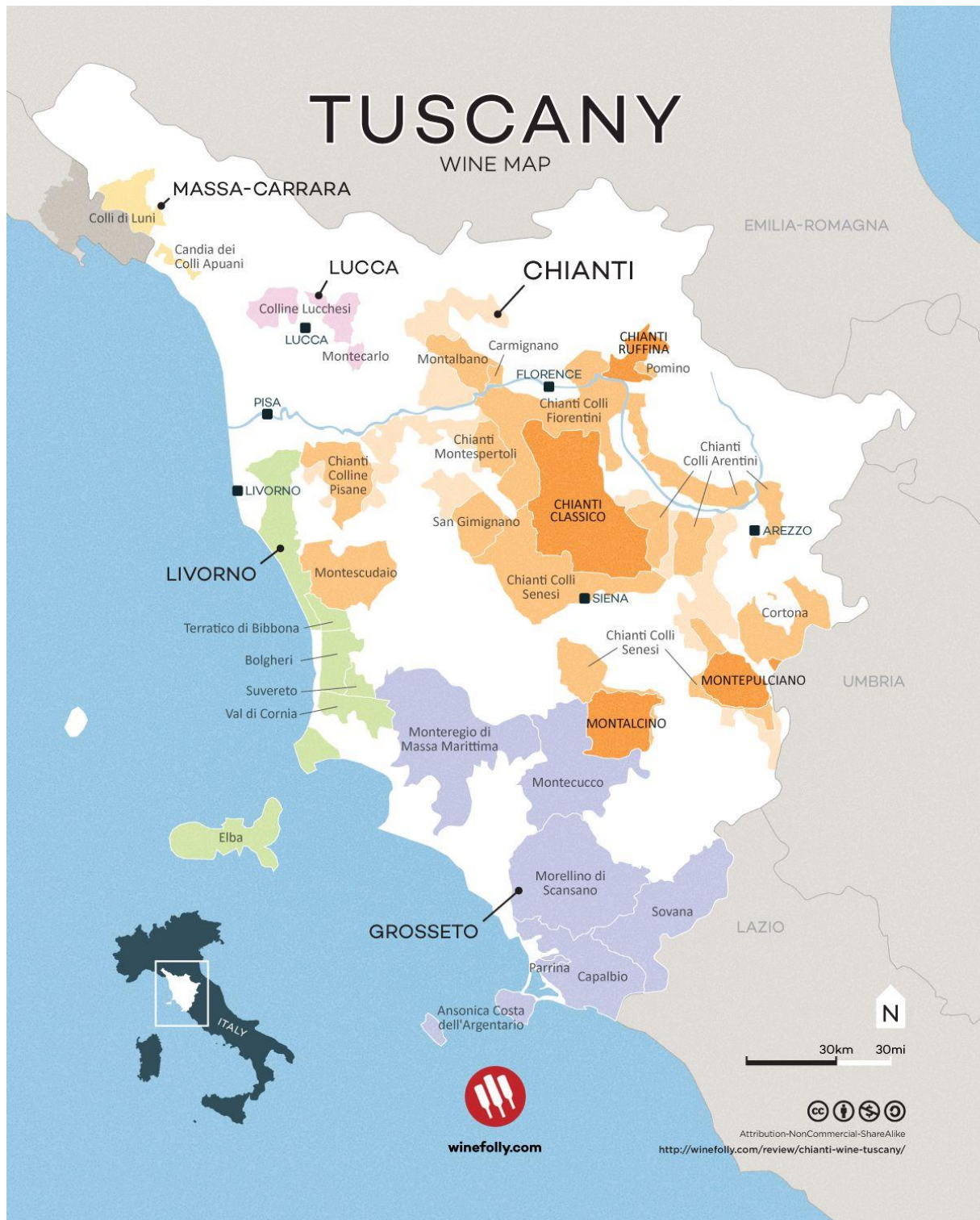


**Figure 9 Map of Tuscany (Wine Folly, 2014)**

# APPENDIX 2 – Questionnaire for tourists

1. Where are you from?
    a. USA
    b. Brazil
    c. France
    d. UK
    e. Italy
    f. Germany
    g. Spain
    h. Other
2. What is your age?
    a. 18 – 25
    b. 26 – 35
    c. 36 – 45
    d. 46 – 55
    e. 56 – 65
    f. + 65
3. Why did you choose this particular period?
4. What is your personal situation?
    a. Single traveller
    b. Couple
    c. Family
    d. Friends (group)
5. What is the duration of your stay?
    a. 1 – 4 days
    b. 5 – 10 days
    c. + 10 days
6. What were your main/first motivations to come in Tuscany?
    a. Cultural
    b. Wine and gastronomy
    c. Resting
    d. Other
7. In general, what are your areas of interests and/or leisure activities? (several answers possible)
    a. Sport
    b. Nature related activities (hiking, fishing, …)
    c. Culture and art related activities (historical, art museums, cinema, …)
    d. Wine and gastronomy (wine tasting, cooking class, cooking, …)
    e. Relaxing
    f. Family time
    g. Other

Google Form: https://goo.gl/forms/L6fhAY4cftn6Pgbq1

# APPENDIX 3 – List of websites and contact details

Associations:

1. Città del Vino: http://www.cittadelvino.it/pagina.php?id=Mg==
    a. Angelita Paciscopi, Regional Coordinator Tuscany: angelita.paciscopi@gmail.com
    b. Iole Piscolla, Wine tourism: piscolla@cittadelvino.com
2. Movimento Turismo del Vino: http://www.movimentoturismovino.it/it/home/
    a. Organisational Secretary: segreteria@movimentoturismovino.it
3. Consorzio Vino Chianti Classico: http://www.chianticlassico.com/en/consortium/history/
    a. Phone number: 055 82285


Public organisations:

1. Agenzia Nazionale del Turismo: http://www.enit.it/fr/
    a. Marketing and Promotion Department: direzione.marketing@enit.it
2. Osservatorio Nazionale del Turismo: http://www.ontit.it/ont/
    a. Editorial Office : redazione.ontit@enit.it
3. Regione Toscana: http://www.toscanapromozione.it/ ;
    a. Toscana Promozione Turistica: toscanapromozione@postacert.toscana.it
4. Centro Studi Turistici Firenze: http://centrostudituristicifirenze.it/
    a. Email: info@cstfirenze.it

# APPENDIX 4 – Questions for professionals

We are going to talk about small-scale wineries situated in Chianti region in Tuscany. My thesis is about how wine tourist activities in these small-scale wineries could be improved during the low season. For that, I am intending to discover who are the low season tourists in Tuscany and Chianti area (from origin, age, areas of interests, …). Then, I would like to know what are the best communication channels through which it is best to target them. And now, I am intending to find marketing communication tools that these wineries could implement in their own strategy to target these particular low season tourists. For this, a semi-structured interview will be used.

1. What are the marketing communication tools the most efficient in relation to wine tourism activities?
2. How should these small-scale wineries communicate about their wine tourism activities/experiences?
3. If you had one only tool to recommend to these small-scale wineries to implement into their marketing communication strategy, what would it be?

Regarding the profiles of these low tourists, who are mostly from USA, Italy and China:

3. Do you think that the marketing communication strategy should be differentiated for each type of tourists? (channels, tools, …)
4. Which wine tourism activities should small-scale wineries offer in general? What could they offer regarding each type of tourists?
5. According to your experience in marketing/communication/promotion, can you tell me what did or did not work in relation to wine tourism to attract tourists in terms of marketing communication strategy?
6. What have you learnt from this?
7. If you have anything to add, please feel free to tell me.

# APPENDIX 5 – Total of tourists, from Regione Toscana

| Paese di provenienza | 01 Arrivi | 02 Arrivi | 03 Arrivi | 10 Arrivi | 11 Arrivi | 12 Arrivi |
|---|---|---|---|---|---|---|
| Abruzzo | 4 003 | 4 316 | 5 925 | 6 483 | 6 542 | 6 602 |
| Basilicata | 1 393 | 1 579 | 2 141 | 2 357 | 2 309 | 2 244 |
| Bolzano-Bozen | 987 | 1 249 | 1 842 | 2 940 | 2 550 | 1 219 |
| Calabria | 4 626 | 4 971 | 6 674 | 6 795 | 6 768 | 5 851 |
| Campania | 21 677 | 24 757 | 27 609 | 25 366 | 28 506 | 30 714 |
| Emilia-Romagna | 20 452 | 19 539 | 29 500 | 31 505 | 29 466 | 28 345 |
| Friuli-V. Giulia | 3 407 | 3 620 | 5 041 | 5 162 | 5 409 | 4 346 |
| Lazio | 42 979 | 46 474 | 57 722 | 61 568 | 57 402 | 76 820 |
| Liguria | 9 449 | 9 683 | 13 001 | 13 989 | 13 227 | 13 040 |
| Lombardia | 45 299 | 40 455 | 63 214 | 60 577 | 54 821 | 63 223 |
| Marche | 7 195 | 6 382 | 8 965 | 10 200 | 10 091 | 11 059 |
| Molise | 818 | 996 | 1 317 | 1 218 | 1 346 | 1 313 |
| Piemonte | 15 984 | 16 897 | 22 266 | 20 608 | 20 752 | 20 289 |
| Puglia | 10 025 | 10 005 | 13 046 | 15 496 | 13 250 | 11 729 |
| Regione italiana non indicata | 3 034 | 2 580 | 4 978 | 7 554 | 3 906 | 4 086 |
| Sardegna | 3 927 | 3 778 | 5 172 | 5 233 | 5 058 | 4 509 |
| Sicilia | 8 867 | 9 783 | 12 363 | 12 185 | 12 435 | 10 422 |
| Toscana | 48 772 | 49 260 | 59 534 | 58 228 | 47 872 | 65 523 |
| Trento | 1 365 | 1 781 | 2 814 | 3 560 | 3 295 | 1 811 |
| Umbria | 6 240 | 6 761 | 7 428 | 7 223 | 7 762 | 7 378 |
| Valle d'Aosta | 325 | 348 | 519 | 681 | 562 | 438 |
| Veneto | 18 261 | 17 733 | 26 454 | 25 033 | 22 938 | 23 652 |
| Altri Paesi Africa Mediterranea | 1 198 | 1 070 | 1 716 | 1 229 | 1 550 | 1 189 |
| Altri Paesi Asia Occidentale | 2 979 | 2 444 | 5 453 | 3 723 | 3 275 | 2 543 |
| Altri Paesi Centro-Sud America | 6 462 | 6 348 | 6 679 | 12 973 | 8 159 | 5 697 |
| Altri Paesi Europei | 3 291 | 3 743 | 7 129 | 10 464 | 5 578 | 4 497 |
| Altri Paesi dell'Asia | 10 152 | 10 648 | 16 640 | 21 488 | 16 726 | 17 768 |
| Argentina | 5 694 | 5 636 | 7 047 | 12 674 | 5 950 | 2 765 |
| Australia | 6 647 | 2 288 | 3 467 | 12 720 | 4 000 | 6 325 |
| Austria | 1 100 | 1 724 | 4 965 | 10 066 | 2 423 | 1 328 |
| Belgio | 2 155 | 2 374 | 8 752 | 6 109 | 2 668 | 1 582 |
| Brasile | 10 975 | 7 510 | 10 219 | 19 914 | 9 983 | 8 563 |
| Bulgaria | 866 | 1 231 | 1 851 | 2 160 | 1 070 | 721 |
| Canada | 1 619 | 1 891 | 5 810 | 15 944 | 3 530 | 1 841 |
| Cina (incluso Hong Kong) | 36 563 | 34 349 | 41 580 | 64 042 | 39 724 | 31 964 |
| Corea del Sud | 13 586 | 10 891 | 8 689 | 18 858 | 10 827 | 9 816 |
| Croazia | 912 | 720 | 1 410 | 3 838 | 1 359 | 1 227 |
| Danimarca | 651 | 523 | 2 152 | 5 961 | 992 | 363 |
| Egitto | 375 | 287 | 431 | 521 | 426 | 403 |
| Finlandia | 283 | 399 | 940 | 2 200 | 547 | 331 |
| Francia | 10 612 | 17 773 | 24 851 | 43 932 | 18 029 | 17 308 |
| Germania | 7 607 | 10 138 | 22 044 | 70 874 | 12 108 | 6 608 |

| | | | | | | |
|---|---|---|---|---|---|---|
| Giappone | 11 930 | 20 587 | 19 406 | 14 827 | 11 823 | 9 767 |
| Grecia | 1 920 | 2 013 | 3 734 | 2 520 | 2 365 | 3 137 |
| India | 1 664 | 2 035 | 3 138 | 7 474 | 3 114 | 3 937 |
| Irlanda | 696 | 1 005 | 1 532 | 3 775 | 1 171 | 682 |
| Israele | 906 | 1 532 | 2 198 | 6 684 | 2 483 | 1 681 |
| Lituania | 264 | 424 | 579 | 769 | 444 | 259 |
| Malta | 406 | 415 | 515 | 584 | 485 | 610 |
| Messico | 2 651 | 1 531 | 3 193 | 6 061 | 4 514 | 3 484 |
| Non specificato | 2 373 | 2 589 | 3 491 | 4 819 | 3 815 | 3 086 |
| Norvegia | 468 | 378 | 1 008 | 4 161 | 975 | 318 |
| Nuova Zelanda | 563 | 261 | 430 | 1 792 | 719 | 661 |
| Paesi Bassi | 2 592 | 2 283 | 4 262 | 14 765 | 3 549 | 2 480 |
| Polonia | 1 895 | 2 627 | 3 675 | 8 564 | 3 409 | 1 586 |
| Portogallo | 1 375 | 1 667 | 1 829 | 3 347 | 1 861 | 1 518 |
| Regno Unito | 8 684 | 12 665 | 19 083 | 35 571 | 12 049 | 8 370 |
| Repubblica Ceca | 510 | 708 | 1 525 | 2 322 | 964 | 531 |
| Romania | 2 644 | 4 030 | 4 877 | 5 285 | 3 871 | 2 712 |
| Russia | 10 862 | 7 339 | 12 232 | 15 946 | 10 277 | 7 801 |
| Slovacchia | 179 | 288 | 577 | 1 068 | 527 | 192 |
| Slovenia | 362 | 500 | 1 464 | 3 695 | 1 052 | 645 |
| Spagna | 12 285 | 14 112 | 21 560 | 27 614 | 15 135 | 17 118 |
| Stati Uniti d'America | 18 635 | 18 819 | 52 729 | 96 338 | 37 742 | 23 820 |
| Sud Africa | 410 | 236 | 537 | 1 410 | 655 | 1 082 |
| Svezia | 980 | 974 | 2 253 | 8 400 | 1 719 | 597 |
| Svizzera (incluso Liechtenstein) | 3 237 | 3 676 | 6 602 | 37 232 | 5 964 | 4 648 |
| Turchia | 4 023 | 2 121 | 3 525 | 5 028 | 3 488 | 2 022 |
| Ucraina | 1 799 | 1 205 | 2 112 | 3 513 | 2 008 | 1 486 |
| Ungheria | 788 | 983 | 2 205 | 5 558 | 1 968 | 824 |

# APPENDIX 6 – ANSWER 1 TO QUESTIONNAIRE

*1.    What are the marketing communication tools the most efficient in relation to wine tourism activities?*

They need a strategy to be interesting (products, services and different ideas). and then press office, PR, social and networking are the most efficient tools. In general, for small wineries it is not the better tool an advertising strategy. It is better unconventional marketing and a very punctual selected target

*2.    How should these small-scale wineries communicate about their wine tourism activities/experiences?*

They can spend the brand and awareness of Chianti as the same also Tuscany.

First of all, Chianti and other wine areas are so famous that tour operator, media or blogger are used to talk about Tuscany but they have to find something new and so for the new and small-scale wineries this is a very good opportunity to be contacted

But for the same reason they need to create an offer or idea good and different to be interesting and to exist in the competition. In this case it could be right to think something different also for target of a slow season

Other opportunities are to be connected in a network with other point of interest for tourist (B&B, museums, beach, infopoint, etc)

In Chianti there are a lot of tourists and a lot of house owner coming all around the world and if a small-scale winery can have some of these with a good service and good points it is easy to use the Mouth to mouth (definitely a lot of friends of them come in Italy and in Tuscany in a few following years)

*3.    If you had one only tool to recommend to these small-scale wineries to implement into their marketing communication strategy, what would it be?*

 If I have just one tool i think PR with social strategy but before I recommend to develop an idea or something interesting because the people need to have something to talk about

Regarding the profiles of these low tourists, who are mostly from USA, Italy and China:

*1.    Do you think that the marketing communication strategy should be differentiated for each type of tourists? (channels, tools, …)*

yes absolutly. Motivation, timing, culture, background, how they use media... everything is different. And for each country there are a lot of different target (wine lovers, a romantic tour, a daily winery experience, just old persons, friends, a young group, families... Before I suggest each winery has to profile a main target and ensure an appropriate offer/service and then it can use the best tool to get to selected target

*2.    Which wine tourism activities should small-scale wineries offer in general? What could they offer regarding each type of tourists?*

Basically taste in language, visit the place, explanation of the wine process.

*3.    According to your experience in marketing/communication/promotion, can you tell me what did or did not work in relation to wine tourism to attract tourists in terms of marketing communication strategy?*

The experiences are generally very appreciated by tourists. Definitely a small winery that offers itself to the tourism market need to create an interesting and different storytelling (working on product, process, place, history, legend and so on) and participate in a network using PR activities

4.    *What have you learnt from this?*

5.    *If you have anything to add, please feel free to tell me.*