AIM OF THE SURVEY:

This market survey will focus on how the economic subjects working in the wine and wine tourism sectors in each Capital have faced the current economic crisis; the theme “Financial stability and viability of wine business in the GWC” will be developed by investigating on the diversification of business managed by the wineries, particularly in wine tourism and alternative sales concepts.
1. Methodology
2. The Wine Tourist’s Profile
3. Wine Tourism’s Figures
4. Promotion
5. Sales and Export
6. Income
7. Investments
8. Best of Wine Tourism Competition
9. Conclusions
1. METHODOLOGY
METHODOLOGY

Technique: quantitative research
Contact: per e-mail and web
Referred to: wineries opened to tourism in each GWC member city
Sample: 454
Questionnaire: structured interview with closed and open questions

<table>
<thead>
<tr>
<th>Capital</th>
<th>Nr</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cape Town</td>
<td>102</td>
</tr>
<tr>
<td>Bilbao – Rioja</td>
<td>34</td>
</tr>
<tr>
<td>San Francisco - Napa Valley</td>
<td>25</td>
</tr>
<tr>
<td>Porto</td>
<td>27</td>
</tr>
<tr>
<td>Mainz - Rheinhessen</td>
<td>43</td>
</tr>
<tr>
<td>Bordeaux</td>
<td>102</td>
</tr>
<tr>
<td>Florence</td>
<td>68</td>
</tr>
<tr>
<td>Mendoza</td>
<td>53</td>
</tr>
</tbody>
</table>
2. THE WINE TOURIST’S PROFILE
The wine tourist’s profile:

The presence of national costumers and of foreigner costumers is predominant. Local people play a little role in the wine tourist’s profile. As far as the foreigners are concerned they usually come from EU, USA, UK, Netherland and Canada.
What gender your visitors are:

- Female
- Male

There is a clear prevalence of male customers.

Age of the visitors:

- Over 55 years old
- 36-55 years old
- 18-35 years old

The age range is between 36-55 years.
3. WINE TOURISM’S FIGURES
Opening Year of the 3 oldest wineries* in each city:

<table>
<thead>
<tr>
<th>City</th>
<th>Year 1</th>
<th>Year 2</th>
<th>Year 3</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bordeaux</td>
<td>1300</td>
<td>1300</td>
<td>1500</td>
</tr>
<tr>
<td>Mainz</td>
<td>1566</td>
<td>1650</td>
<td>1700</td>
</tr>
<tr>
<td>Porto</td>
<td>1692</td>
<td>1818</td>
<td>1820</td>
</tr>
<tr>
<td>Bilbao - Rioja</td>
<td>1896</td>
<td>1924</td>
<td>1940</td>
</tr>
<tr>
<td>Florence</td>
<td>1592</td>
<td>1707</td>
<td>1773</td>
</tr>
<tr>
<td>Cape Town</td>
<td>1685</td>
<td>1710</td>
<td>1822</td>
</tr>
<tr>
<td>Napa</td>
<td>1963</td>
<td>1948</td>
<td>1973</td>
</tr>
<tr>
<td>Mendoza</td>
<td>1990</td>
<td>1998</td>
<td>2000</td>
</tr>
</tbody>
</table>

Old wine cities: opening between 1300 and 1773

New world wine cities: opening between 1685 and 2000

* Among the wineries that involved in the survey
Beginning of the wine tourism activities:

In which year did you start your wine tourism activity?

The beginning of the wine tourism activities attests in all the cities around the 90’s.
How many tourists, approximately, visit your winery every year?

- Up to 700: 35.5%
- 700-2,500: 14.8%
- 2,500-6,000: 15.3%
- 6,000-10,000: 23.3%
- More than 10,000: 11.0%

In which season do you welcome the highest number of visitors?

- Winter: 70.4%
- Spring: 15.3%
- Summer: 8.3%
- Fall: 3.4%
- No difference: 2.7%
There is a gap between the visitors’ expenses in Florence, Napa and Porto and the rest of the city members of the “Great Wine Capitals” international Network.
Which are the most important benefits that wine tourism brings to your winery and to your community?
4. PROMOTION
How do you promote the tourism services of your winery?

- Incoming travel agencies/Tour operators: 47.9%
- Tourist information office: 68.0%
- Participation in tourism exhibitions: 29.3%
- Participation in wine fairs: 52.3%
- Specialized media: 33.2%
- Wine tasting events: 63.7%
- Traditional advertising (Facebook, others): 28.6%
- Social networks (Facebook, others): 41.2%
- Mailing/Newsletter: 61.0%
What kind of activities/services do you offer to tourists?

- Gastronomy/restaurant: 39.9%
- Guided visits: 74.9%
- Museum: 83.1%
- Wine tasting events: 10.1%
- Spa/wine-therapy: 3.6%
- Lodging/Accommodation: 28.7%
- Temporary Exhibitions: 17.1%
- Sports, cultural or social activities: 20.3%

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What are the most important assets that help you to attract enotourism to your winery?

- Brand Positioning: 60.3%
- Winery history: 53.6%
- Proximity to important city or natural area/park: 48.8%
- Winery architecture: 39.0%
- Winery services (restaurant, accommodation, conference room, spa...): 42.6%
How do you promote your wines on local and international markets?

- Direct promotion
- Website
- Mailing / Newsletter
- Professional fairs
- Town fairs/local markets
- Wine tasting events
- Social networks
- Traditional advertising
- Specialized media

**International Market**

- Direct promotion: 129
- Website: 276
- Mailing / Newsletter: 259
- Professional fairs: 340
- Town fairs/local markets: 252
- Wine tasting events: 250
- Social networks: 320
- Traditional advertising: 145
- Specialized media: 158

**Domestic Market**

- Direct promotion: 61
- Website: 102
- Mailing / Newsletter: 66
- Professional fairs: 134
- Town fairs/local markets: 201
- Wine tasting events: 174
- Social networks: 192
- Traditional advertising: 102
- Specialized media: 101
5. SALES AND EXPORT
Have your wine sales increased in the last 5 years?

- Yes: 73.8%
- No: 26.2%
Does your winery export?

- Yes: 83.3% - No: 16.7%
- Yes: 82.6% - No: 17.4%
- Yes: 63.6% - No: 36.4%
- Yes: 81.4% - No: 18.6%
- Yes: 74.1% - No: 25.9%
- Yes: 95.8% - No: 4.2%

SALES AND EXPORT
Main countries of exportation

Do you think consumers in your export markets are potential clients/visitors for your activity?
Even if the tourism activity contribute to the income approximately 20% the winery’s income mostly depends on the wine sales.

What percentage of your income comes from wine sales and from tourism activities?

- Wine sale: 77.90%
- Tourism activity: 19.45%
What is the most important distribution channel for your wines?
Could you say that wine tourism in your winery is financially viable?
6. INCOME
Regarding your income related to tourism, how is the percentage distributed?

- Wine sales: 68.03%
- Hangising/gadgets: 8.72%
- Tourism services: 20.52%
- Food services: 23.61%
- Accommodation: 36.58%
- Other: 14.10%
Can you give an estimation of the income coming from your tourism activities (in US $)?

The Napa’s information collected on this response was not wide enough sample to demonstrate the average.
Do you consider wine tourism activities as a good alternative to face economic crisis periods?

- 38.8% Yes
- 24.5% Yes, very much
- 27.5% More or less
- 10.0% No, not at all
7. INVESTMENTS
### How much did you invest in wine tourism last year (in US $)?

<table>
<thead>
<tr>
<th>Category</th>
<th>Investment (US $)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Infrastructure</td>
<td>247</td>
</tr>
<tr>
<td>Winery market positioning</td>
<td>233</td>
</tr>
<tr>
<td>Training of employees</td>
<td>151</td>
</tr>
<tr>
<td>Strategic partnerships</td>
<td>186</td>
</tr>
</tbody>
</table>

### During the last 5 years, did you make any investment in any of these fields related to wine tourism?

<table>
<thead>
<tr>
<th>Category</th>
<th>Investment (US $)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Improvement of services</td>
<td>45 020</td>
</tr>
<tr>
<td>Winery market positioning</td>
<td>75 375</td>
</tr>
<tr>
<td>Training of employees</td>
<td>54 000</td>
</tr>
<tr>
<td>Strategic partnerships</td>
<td>136 217</td>
</tr>
<tr>
<td>CAPE TOWN</td>
<td>4 157</td>
</tr>
<tr>
<td>BILBAO - RIOJA</td>
<td>28 092</td>
</tr>
<tr>
<td>NAPA</td>
<td>15 895</td>
</tr>
<tr>
<td>PORTO</td>
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<td>FLORENCE</td>
<td>15 895</td>
</tr>
</tbody>
</table>
When do you think your investment will prove results?

Investments are expected to prove results in the medium term. This means that the investment have been fairly significant.
8. BEST OF WINE TOURISM COMPETITION
Do you know the "Best of Wine Tourism" competition, created by the Great Wine Capitals Global Network?

Have you ever participated in the competition?

- Yes: 78.2%
- No: 21.8%
If you have been awarded once, did the award contribute to the promotion of your winery?

- Yes: 65.3%
- No: 34.7%
Here a list of some important comments:

• No one seemed to care, besides a mention in the local paper. (Napa)
• The application process is not clear regarding standards. (Porto)
• Communicate more and more and create networks and create events together with the other cities. (Bordeaux)
• They need to accommodate the smaller producer that is NOT close to big cities and proximate of a lot of people. You cannot compare what the wineries are offering. (Cape Town)
• More interaction among the awarded wineries. (Florence)
• The award is not known. (Bilbao – Rioja)
• We are proud of our award but the visitors do not know what kind of award it is and why we achieved it, it has not helped us to promote our winery in an international way. (Mendoza)
9. CONCLUSIONS
• The wine tourism activity seems to be sustainable and financially viable.

• Incomes are in general pretty positive.

• It is a lively activity, with a lot of different possibilities.

• There is still a gap between the “old wine cities” and “the new world wine cities”, but are we truly different?
Thank you for your kind attention!