Developing more Wine Tourism in Britain

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Abstract. ***There has been considerable research on the characteristics of wine tourism but little on how it affects the U.K. wine industry. This paper looks the 7 'Ps' of marketing strategy, how they apply to the U.K. wine industry and how they can help individual vineyards to enhance their own tourist-related marketing strategy.***

There has been much research around the world into the characteristics of wine tourism. When looking at retail analysis of U.K. vineyards in 2003, *Richardson and Dennis* [13] examined how McCarthy's (1960) '4 P's (product, promotion, place and price) applied. In this paper, the relevance of the "7Ps", based on the model proposed by *Booms & Bitner* [4] will be examined.

The most important factor is undoubtedly **people**, who they are, where they are coming from, why they are coming. **Product** mainly concerns the wine and other items marketed by the vineyard. Many tourists wish to see the **process** by which the product is made. Thus guided tours of vineyard and winery can enhance peoples' experiences and make them willing to pay the **price** for the product. This price depends largely on the area and the type of people. In an established tourist region, people may be willing to spend far more on a bottle of wine than they would say, in a farmers' market . **Place**, for vineyards, is not something that can easily be put 'on the tourist trail', since it depends on the growing conditions available, however, to be on a tourist route, it must be accessible. **Packaging** should address both the approaches to, and the first impressions of as well as the layout of the site. Few people will stay if faced with a small shed and one or two people wandering about. Finally, the products must be **promoted**, either on-line, by leaflet or (hopefully) by word of mouth. The customer must know that the products exist and have confidence that the experience is worth their time spent on a visit.

Who is the Wine Tourist?

A wine tourist can be defined as a person who visits a vineyard. Early research, using comments from vineyard owners, seemed to regard most tourists as 'mobile drunks' rather than potential long-term customers. However, there is now research which analyses the reasons why people visit vineyards. The benefit of this for a vineyard owner is that by knowing the nature of their visitors, they can target their advertisements and offerings precisely. This paper is concerned with examining how vineyard regions across the world have tackled these seven factors and how such analysis could be applied in the U.K.

Wine tourism can be defined as '*visitation to vineyards, wineries, wine festivals and wine shows for which grape wine tasting and/or experiencing the attributes of a grape wine region are the prime* *motivating factors for visitors'* (*Hall and Macionis* [6]). The 'winescape' to which they are attracted is, in many countries, an attribute of a whole region, e.g. 'The Champagne' or 'the Napa Valley'. In Britain it is more difficult to define a 'winescape' as vineyards in most areas occupy only a very small proportion of any area (Hampshire vineyards for example, occupy less than 1% of that county). However, the features that are needed, according to *Peters* (1997) are '*the presence of vineyards, the wine production activity and the wineries where wine is produced and stored'*. Further writings by Hall suggest that the environment also needs a 'tourist terroir' i.e. a combination of physical, cultural and natural environment that will attract visitors. Wales and Cornwall certainly fit this description. Carmichael (in Columbini) believes that the tourist landscape includes '*cultural heritage, festivals, romance and relaxation, exploration*'. Linking wine tourism to such industrial, cultural, rural and special interest tourism have also been cited as important by many writers.

Wine tourism gives vineyards the opportunity to increase their sales either individually, or in conjunction with other regional attractions. If marketed regionally, it can be very successful. *Karlsson* (2017) noted that the development of Wine Trails in Spain has increased revenues by 15% while those of California add $2billion to the economy. Viticultural regions in those countries may be strong enough to work in isolation but those in countries such as Britain are not and need to look for strategic alliances with other local attractions in order to create tourist trails.

1. People

i) **New Zealand**. According to research by *New Zealand Tourism* [15] the country saw over 220,000 international visitors in 2004, with 13% of them going to a vineyard. Of these, Marlborough region saw 43,000 visitors in 2009, closely followed by Auckland with 30,000. Between 2009 and 2014, the average number of wine tourists from Australia was 47,500, from the USA 22,200, from the UK 20,700 and from Germany 6,400. Sweden, the UK and Canada also feature in the figures. This suggests that people from northern hemisphere countries have an appetite for this type of tourism, and, this, for English vineyards, represents a largely untapped market. New Zealand research also shows that the main age ranges for wine tourists are from 25-34 (28%) and from 55 to 64 (23%). The lowest figures are for visitors of wine consuming age below 24. 89% of these wine tourists were independent travellers, while the others were part of a tour or on package holiday. Most of the tourists included relaxing rural activities as part of their tour, including museums and galleries, wildlife and bird watching.

ii) **Italy**, *Colombini* [5] suggests that wine tourism sales represent 17.8% of vineyard turnover. Much of this takes place while the tourists are following 'food trails'. This percentage could be larger if more wineries were equipped for tourism- at present only about 1200 of 21000 wineries are so equipped. In Italy, similar groups have been recognised by Movimento del Turismo del Vino and cited in '*Wine Tourism around the world* [16],

a. The "Professional
b. "The "Impassioned Neophyte"
c. The hanger on
d. The drinker

These visitor breakdowns are not universal across Italy. According to Pezzone [2] visitors to Puglian vineyards are 99% tourists, with very few local residents joining wine tours.

iii) **France**, *A Tout France*, the Tourist development agency, has calculated that the 42% of the 10m wine tourists are foreign and has targeted advertising campaigns aimed at Canadians and Americans. Statistics for 2016 also show that the average amount spent per visitor is Eu2409, of which Eu1256 in spent on wine.

iv) **Other countries** Studies in various other countries have found fairly similar patterns. In Greece, *Alebaki and Iakovidou* [1] found 4 groups, The Wine Lover, (highly educated and wealthy); The Neophytes (low income students with a special interest in wineries); Occasional wine tourists (interested mainly in all forms of local gastronomy) and hangers-on (those who have joined tours etc. as part of a general package tour in a specific region). As a result of this and other studies, Greece has developed '*Wine Roads* ' to motivate potential vineyard visitors. The South East Vineyards Association in the UK has a similar online route.

Little research has been done in the UK. However *Pezzone* [14] identifies 4 different types of tourist. The 'curious' who are looking for something different to do at the weekend; the Wine Lover, who have interests in the growing and making; trade customers and impromptu visits by couples. Each must be dealt with in a different way.
All the studies agree that amongst the groups are those who seek knowledge about wine, its production, ethos and regional difference. These range from the connoisseur, who seeks new experiences to add to their palate, to the novice, who may become interested given encouragement. There are also many who are aware of wine, but who have no specific interest apart from as occasional consumers, but who have been encouraged to visit as part of a general regional package.

2. Product

The range of offerings at a vineyard can be a major attraction, the most important of which is the availability of sufficient quantity and quality of wine. In smaller vineyards, this may be a problem since many have insufficient wine to last until the next year's vintage becomes available. Few, if any, UK wines are marketed as 'vintage', simply because demand outstrips supply. The only exception to this is in the sparkling wine sector (now the main product) where aging is usually expected. *Nyetimber* [10] for example, one of the first specialist sparkling wine producers, is currently selling wines from 2009 through to 2013. In the still wine area, *New Hall in Essex* [8], one of the oldest commercial vineyards, is an exception, selling still wines from 2016-2017. Expanding the offerings beyond wine can increase the attractiveness of the vineyard by providing sales when wine is not available. Several vineyards, such as Yorkshire Heart, brew beer and Pant Du in North Wales produces its own bottled water and cider.

3. Process

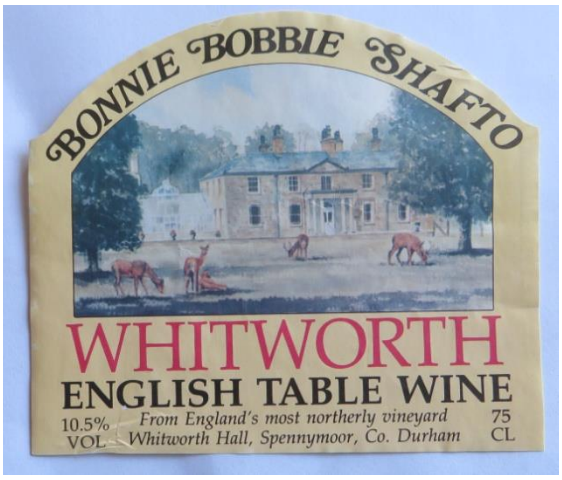
Not all U.K. vineyards can offer a demonstration of wine making as the cost of equipment means that many of the smaller establishments contract out all or part of their wine making. In Wales and the Midlands, Halfpenny Green and Three Choirs carry out the actual processing, though the product will be taken back to the vineyard where tastings take place. Where facilities are not available on site, then large scale photographs, information displays and videos of the processing could be made available. Tours of the vineyard could also be used in order to show methods of growing and pruning, are also common.

4. **Price**

Attracting customers with a low price is rarely an incentive in Britain, since the cost of growing and making wine and of tax has always been high. A supermarket may sell a bottle of southern hemisphere wine for about £6.00 as that covers the production, transport costs and profit margins. In Britain, prices are much higher as volumes are lower. In Cornwall, a bottle of home produced still white would retail for an average of £16 and in Kent – where many vineyards are larger, for about £12.50. In Leicestershire, where there vineyards are more of a rarity, prices vary between £12 and £15. However, because of demand, most vineyards sell all their production.

Place

Colombini [5] identifies castles and villas of great historical or artistic interest as major tourist destinations and those with vineyards as even more so. The British Isles have a long history of growing grapes in the gardens of stately homes which could be expanded. In Hampshire, the Gore-Browns planted at Beaulieu in the 1960s, and left their vineyard to Lord Montagu. It still exists and the motor museum, vineyard and stately home make for a day trip which others could use as a model. One who followed this example was Sir Reresby Sitwell, who planted at Renishaw Hall in Derbyshire in 1972. At that time, it was the most northerly vineyards in Britain. Today, it is still there, together with the gardens, house and museum. Castell Coch, home of the Marquis of Bute, and Whitworth Hall in County Durham also had vineyards, which sadly have disappeared, but Croft Castle in Herefordshire has recently been added to the attractions of that National Trust property. The potential is there for other owners of Britain's many stately homes and in surrounding areas. In Ceredigion for example, Llaethliw vineyard lies adjacent to the National Trust property at Llanerchaeron which could be of mutual benefit. The vineyard also needs to be near a tourist route. Being an agricultural product, dependant on the weather, makes a vineyard a difficult thing to locate from the tourist's point of view. Thus they need an incentive to come to the vineyard, however far down a narrow road it may be. This requires signage and prior knowledge that there is a worthwhile experience at the destination. It may also preclude large coach parties if country lanes are unsuitable. *Colombini* [5] believes that in Italy, 6 hours is the maximum time that a visitor is prepared to take to reach their destination, and that it should be accessible from an airport or train station.



5. **Packaging**

In the tourism context, packaging can be described as making the whole offering attractive to the potential customer. The customer, having arrived at the site, needs to see an attractive layout and sufficient facilities in order to make then keen to stay. *Karlssons* [7] found 4 main groups of activities that attract tourists. Big Budget features include accommodation. Holmfirth Vineyard has invested heavily in converting an old quarry into sustainable holiday units, while both Llanerch and Denbies have units that allow families booking the vineyard for their wedding receptions to stay overnight. Many others have invested in cottages- especially in the south-west where a vineyard makes an

Karlssons' model

ideal base for touring. In Edutainment, one Kent vineyard organised a speed-pruning competition in which teams paid to prune the vines! The presence of a winery, where demonstrations or talks can take place is another major attraction. In California, blending classes are held at which participants can make their own wine from several different varietals.

Linking vineyards together or to other tourist attractions is vital, as coach parties (an increasing market in many countries) often want a full experience of an area. Specialist parties can be catered for, as can be seen in Surrey, where 5 vineyards have banded together to produce a tourist leaflet. In Italy for example, there are pre-arranged tours e.g. 'Exclusive Chianti' lasting anything up to a week. Britain is beginning to see this trend. Two companies offer one day coach trips of either Kent or Sussex. One of them has visits to Bluebell and Court Garden vineyards, a gastro pub and then a scenic excursion into the Downs. The Kent trip involves Chapel Down and one other vineyard. The potential is there in other areas, but most of the other cited bookings involve visits to a single vineyard, often including the possibility of staying in the vineyard cottage. Virgin Experiences have eleven such offers on their books.
Packaging also includes the label on the wine. Some overseas vineyards have gone for humour while others prefer a stark simple design.

6. Promotion

Progressive wine-growing countries have organisations that, having recognising the potential of wine tourism, have put money into producing websites targeted at a world audience. Canada, not specifically known for wine, has a national tourist internet site with a major section '*From Canada-Keep Exploring'*. This provides details of all its wine regions in turn, including a listing of Nova Scotia's '*Good Cheer Trail'* [9] – a vineyard, craft brewery and distillery tour. This should not be difficult to reproduce in Britain, given our vast increase in the artisan producers in all three fields. Their vineyard tours are marketed under the slogan 'Grape Escapes'. The Canadian site also describes Similkammen- a semi-desert in British Columbia as '*one of the best wine regions you've never heard of*' – a slogan that could be applied to parts of Britain! Australia too has a national Internet site [2] with a simple attractive winery page that allows the potential tourist to delve into the wine areas that interest them, before they set out.

In Britain there are few regional (or national leaflets) or internet sites concerning vineyards. The South-East Regional Association has produced an excellent on-line wine-trail leaflet which is good on a computer screen or smart phone but when printed, has to be reduced to an illegible 2 point type before it will fit on the average printer. Only a few commercial tourist sites include vineyards.

The internet does not work in all countries, especially where connections are poor. *Colombini [5]* found that although there are many Internet 'Wine Roads' set up in Italy, very few receive much traffic. Even the most popular,' *Flavours of Trentino'* is very little visited and, while it has many pictures, it has few if any route maps. She suggests that this is a result of web expenditure being regionally based, with wine tourism being a very low priority for the web designers. The value of a tourist wine business in countries with more centralised sites can be seen from the fact that 80% of winery revenue in Niagara, Canada comes from tourists, many of whom book tours via the tourist web sites. Even Nova Scotia, with only a dozen wineries, has a variety of 'Grape Escape' tours bookable online.

Twenty years ago, I was driving through the Chilterns when I came across a sign in the roadside saying 'Vineyard Open'. I knew vaguely that there was a vineyard in the area, but confirmation came as a welcome surprise, and so I found 'Castle Vineyard' at Bampton (probably long since grubbed up.) Today, tourists have less patience and need far more encouragement. The least they expect is a set of brown tourist signs. In 2019, I came down the A487 south of Caernarfon and was guided to Pant Du vineyard with a sign at every road junction. An enlightened local authority! In an article 'Wines of the Balkans' three features were stressed- location, branding and signage. All writers on tourism stress that the minimum requirements for tourist facilities would be:

i) Adequate parking
ii) Friendly staff who believe in the product. Pezzone (2019) believes that visitors should have the opportunity to try any wine before buying.
iii) Family friendly facilities (toilets and a café) and even a picnic area.
iv) Links with 'nature based' activities (a guided walk round the vineyard with labels on trees, views etc.)
v) Proximity to other tourist destinations, and indicators as to how to get to them.
vi) Interaction with the wine maker or grower.
vii) The ability to put your product in the visitor's mind, so that they will come back or will buy in future. A one-time buyer is not a good method of 'growing' the business.
viii) Have a product to sell. With smaller vineyards, this could involve buying in wine from other local producers, so enhancing the regional identity.
ix) The ability to speak a common language with the visitors. Colombini [5] noted that of 21,000 Italian wineries, only 1200 have English speaking staff and restrooms.

Examples of British vineyard customer analyses and facilities

Many British vineyards contacted have so far found tourism to be a small proportion of sales. In holiday areas, with other attractions, this is often much higher. For example

County od sample vineyard	Immediate area	County/ region	Other British visitors	Overseas visitors	Publicity	Facilities
East Berkshire	40%	60%				STW
Oxon	Mostly				Word of mouth	SW
West Berks	50%	35%	5%	10%	Leaflet, local listings	STR
Leicestershire	50%	48%	2%		See below	TW
Monmouth (Vineyard 1)	10%	10%	70%	10%	Local listings, Leaflets	ST
Monmouth (Vineyard 2)	10%	30%	30%	30%	Leaflets, Food trails, Local listings	ST
Key	A- Accommodation, S-= Shop, T= Tours W= Winery R= Restaurant					

One Leicestershire vineyard has had a mixed response to advertising and the type of people who attend. "*I advertise by flyers that I hand out at events (WI talks and stands at local fairs) and heavy use of social media. I have paid for adverts in local free magazines but no reported response from* *these. There are quite a mix of people attending tastings. For the tutored wine tastings, which I do in collaboration with Thirst Media, it seems that about half the tickets have been bought as presents. There are groups that have brought their own picnics with the wine tasting. There are also special occasions, such as birthdays and quite a few reunions and a couple of hen nights. Word of mouth is bringing people in for these. My out and about talks help here. The attendees contain no apparent alcoholics attending, but mainly the curious*."

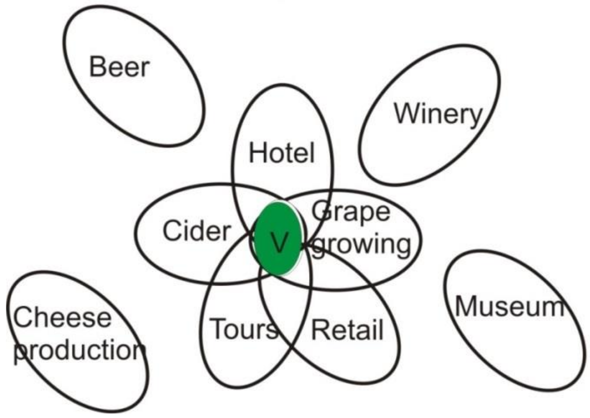
To attract more visitors from afar requires publicity. The respondent vineyards listed their publicity as follows:

i) Local leaflets for individual vineyards (All responding vineyards)
ii) Leaflets produced in conjunction with other local activities. (One Monmouthshire vineyard)
iii) National leaflets. None
iv) Multi-language leaflets. None
v) Vineyard internet sites (all responding vineyards)
vi) Internet sites aimed at tourists. (some social media) Several regional associations e.g. South East, Thames & Chilterns, have, or are in the process of producing a map of vineyards for circulation.

A local strategy

There is a need for a marketing mix, which would bring in tourists with a variety of interests, could improve footfall.

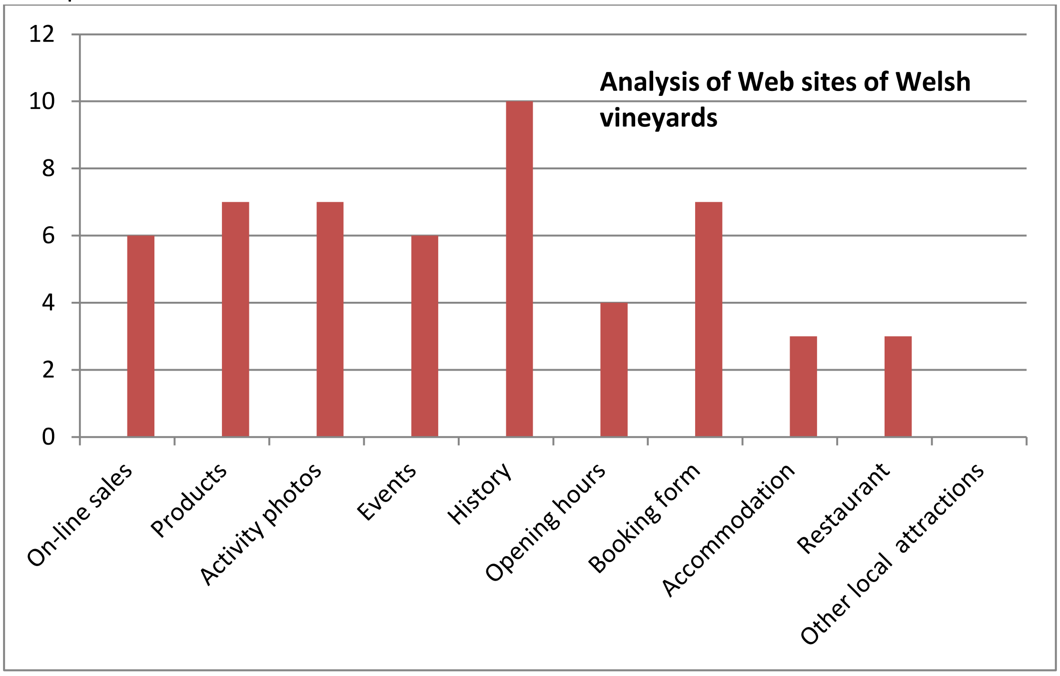
An example of a vineyard with several attractions



In the diagram above, vineyard 'V' grows grapes, produces cider, undertakes tours and has both a shop (which may include other local products, and has accommodation. Other activities shown are not available on-site, but could be marketed as part of a local package which could appeal to tour operators. The only vineyard in Britain which had a museum on-site is Denbies, which hosted the national music collection for the composer Vaughan-Williams. Sadly the museum has now closed but has been replaced by enhanced accommodation. Several vineyards have other alcohol-related activities which attract visitors. Yorkshire Heart has a brewery and both Buzzards Valley and Ludlow have distilleries. Several, such as Trevibban Mill and Avalon also grow cider apples and produce both cider and apple juice. Sharpham in Devon is well known for both its cheese as for its wine. This ensures a wider range of products to attract customers.

Regional strategy

Currently, most publicity in Britain is mainly single-vineyard centred. The internet sites are mainly lists of vineyards, largely produced by regional associations as a platform for their members, or for subscribers. Anyone not a member is ignored. Internet searches may bring them up, but usually by accident unless a specific vineyard is cited (e.g. Camel Valley, Denbies, Chapel Down or other well-known names) the search term 'tourism' will rarely bring them up. If a search term 'Canadian Wine' or 'Californian Wine' was used, regional leaflets would appear. In Britain, there is little work on this. Development of a 'Vineyard App', which allows tourists to locate vineyards in a specific area could help. However there are hopeful signs. Five vineyards in Surrey have recently banded together to produce 'Vineyards of the Surrey Hills'. The South East Vineyards Association has included local inns and restaurants on its leaflet, which provides a basis for a day out. Chapel Down Vineyard has produced a web-based printable leaflet, enabling visitors from afar to have details of what is available before they leave home. Ridgeview Vineyard holds a wine festival for local suppliers, and Brightwell in Oxfordshire is hosting an English Wine and Food festival for local producer and artisan food producers.

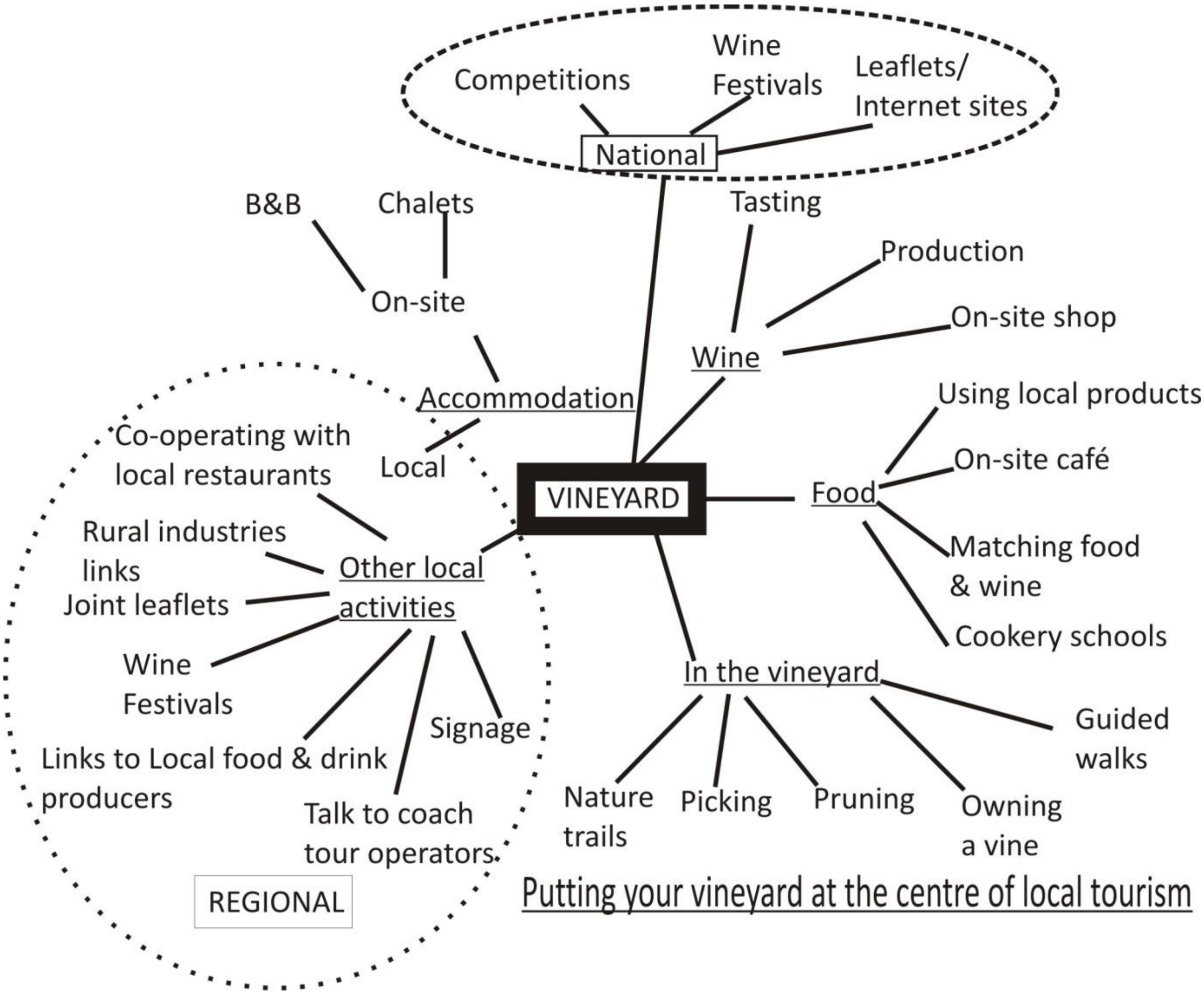


On web sites, Individual vineyards highlight their own activities, largely with photographs. Few if any highlight local activities.

Vineyards in many parts of the British Isles are still thinly spread and often relatively unknown. Because of this, it would benefit them if they worked with other local activities in order to raise their profile and to attract more tourists. To do so requires a business plan, of the type that the PR company Levercliff recently produced for the Welsh Vineyards Association (with Welsh Government funding!) They list features that the local industry needs to do

- Working with other local vineyards to produce a regional brand identity
- Promoting this with local businesses, including the tourist industry. This includes improving quality and availability of products, improving awareness of Welsh wine and perceptions and implementing a market development plan to stimulate tourism. This means that a BRAND IDENTITY is necessary
- Appealing to a market outside the immediate region. In the case of Welsh Wines, this needs the tourist to be aware that Welsh Wine is of good quality and worth pursuing. When articles start to appear describing Wales as the home of 'beer, cheese and wine', in the same way as Scotland can be described as the home of whisky and haggis', then viticulturists will know that they are succeeding
- Associating your product with the regional identity. In the case of Wales, this is straightforward as Wales has a cultural, regional and qualitative identity. Cornwall is probably the other obvious region that meets these criteria.
- Promoting your vineyard in the targeted tourist markets.

- Establishing regional 'Wine Roads' to encourage visitors to explore a wide area.



Any strategy needs to look at which of the features in the above diagram a vineyard is able to provide and which are appropriate to them. When a visit is booked, the nature of the group needs to be known so that the correct level of expertise is available for them and the tour can be planned. For example, the visitors may care to experience viticulture at first-hand, by assisting with picking or owning a vine. Most visitors will certainly need to be able to sample before they buy. 20 years ago, a few bottles could be sampled standing up in the winery, which was usually 2 miles up a narrow lane, signposted only by a piece of cardboard (anyone recognise this description?) This was commonplace in the early 1990s! Today tourists are often looking for more sophisticated facilities. The food and accommodation developments, originally developed by Denbies at Dorking, are now becoming more common. However it is the co-operation with other local activities that represents the biggest challenge, and the potential biggest gain, for the industry. It would also be useful to find out where else in the region that tourists have visited, and contact those places in order to produce a co-ordinated marketing strategy. National and international coverage may also attract visitors by emphasising the professionalism and quality products of your operation.

Conclusions

There is no 'one size fits all' strategy available. Each vineyard will need to assess what it can offer and fit the strategy to meet its facilities and potential demand. Examining the '7 P's with relation to local conditions will assist with this. Once this has been implemented, then a new study can be done to look at potential markets, especially as relates to tourism, firstly at a regional level and then, if size permits, nationally. This will undoubtedly involve investment both in capacity and facilities. Working with other local tourist sites will assist this study.

As an internet site on Balkan vineyards [3] stressed, there needs to be emphasis on Location, Signage and Branding. The vineyard needs to put into the mind of the tourist, by whatever means. Then, the tourist needs to get to the location easily and then see that there is an attractive product to buy at a price that they are willing to pay. First impressions matter but second impressions are what makes people come back and makes them recommend you to their friends, and on internet tourist guides. Any strategy can be summed up as **‘tell them what a wonderful experience they will have**, **tell them how to get there, show them what you have to offer, and sell it!’** Then make sure they go away happy and tell their friends about it.

I have memories of a slogan that was prominently displayed in the industry in which I worked – ‘The customer is king!’ To attract the customer, any industry must have a product to sell and a strategy for selling it and staff that can empathise with the visitors. Tourism is a large revenue earner for the UK. The wine industry needs to ensure that it gains its share.

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