

## ENOTOURISM: A NICHE TENDENCY WITHIN THE TOURISM MARKET

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### *Abstract*

*This paper is aimed at establishing the required actions to be taken so as to improve perception on Romanian wine and vine tourism. In the Romanian wine and vine field, the main changes over the last ten years have been the modernization of wineries by maintaining the valuable local grape varieties and replanting soil with resistant and productive varieties, introducing new technologies in wine production processes and local producers' relocation on the market. Besides all these, technical and material facilities were developed by rehabilitating, modernizing and opening of numerous wine cellars, constructing modern accommodation units within or close to vine areas and implementing marketing programmes aimed at promoting vine areas. The tendencies of hospitality industry corroborated with the change of interest and the perceptions of the tourism products consumers make us reach the following conclusion: enotourism has to be adapted to the innovative market spirit, an efficacious brand strategy has to be defined for the final goal of attracting as many consumers as possible. Enotourism is that form of tourism which offers great local development opportunities to vineyards areas. To conclude, the study will describe the market features and tendencies, based on a large range of resources and it will present ideas connected to the tourism management and economic policies that may positively or negatively influence this field.*

**Key words:** consumer profile, enotourism, promotion, viticulture & viniculture, Wine Road

### INTRODUCTION

Being a dynamic phenomenon, tourism constantly undergoes changes due to various factors of social, cultural, economic, political nature, as well as natural and technological ones. The implemented changes have led to an increased interest in new types of tourism, of which Oenotourism has a particular place.

However, this is not a new concept; the first reference to wine tourism is found under the shape of a "Wine Road" ("Weinstraße") carried out in Germany in 1935 when, as a result of poor crops, Josef Bürckel had the idea to connect by a single road the villages of viticulturists in the Rhineland-Palatinate region in order to stimulate the sales of wine. All the local roads existing along this route were renamed by including "Weinstraße" in their names, and the local municipalities used the extension "an der Weinstraße" in the names of their localities.

Thus, enotourism is a relatively new form of tourism. Its history varies from region to

region. In the Napa Valley region from the USA this form of tourism was launched only in 1975, after some concerted marketing efforts. In other regions, such as Catalonia in Spain, enotourism marketing started in the mid 2000s, with a focus on how such a tourism type can be an alternative to beach and sun, which are basic features that Spain is well-known for as a tourist destination.

In France, the first studies intended to get quality information on the wine tourism routes, local products and actors, as well as the elaboration of marketing and advertising budgets started only in 2000.

Italy is one of the main wine producers in the world, and at the same time, it is one of the main world tourist destinations. Thus, in most cases, enotourism is combined with traditional forms of tourism. The Italian enotourism products are named "Strade dei vini e dei sapori – The wine and taste roads" and it is in 1970 that they started being promoted.

## MATERIALS AND METHODS

Based on the research results published in the recent years, the paper presents an comprehensive image of enotourism at global, European and Romania level. Important remarks are made regarding the map of viticultural regions of importance for enotourims, the EU Policy on Enotourism, the European Charter of Enotourims, wine capitals, European networks of wine cities, the pillars of the EU enotourism, global tourism industry in figures and Romania's situation.

## RESULTS AND DISCUSSIONS

### Policy Governance-European Strategy in Oenotourim

The policy of the European Union is to promote co-operation between the regional authorities and other public authorities throughout its entire territory and of the neighbouring countries that aim at becoming member states of the Union. This approach allows common projects to be implemented and co-operation networks to be developed.

#### A.CERV/AREV

The transfer of functions and competencies to the European power, hitherto assumed by the national authorities in matters of agriculture, environment, international trade and fiscality, justifies the development of dialogue between Europe and the regions.

This dialogue between regions and Brussels involves a preparing work implying a confrontation of the standpoints meant to highlight common interests. Because of the diversity of the wine-producing countries which have different cultural and economic models, a "European parliament for vine and wine" had to be established.

In 1988, the European Wine Regions Conference (CERV) was created in Bourgsur-Gironde/Aquitaine in order to make possible a concerted examination of the European policy on viticulture & viniculture and to create the appropriate framework for all opinions to be heard, both of the regional executive bodies and of the representatives of the wine-producing and naming areas. This political and professional forum, as a structure

allowing joint proposals and agreements, makes it possible to clarify conflicting positions, to limit disagreements and gradually reach the common denominator.

In 1994, in order to increase its efficiency, the European Wine Regions Conference (CERV) adopted in Marsala/Sicily a new statute and became the [Assembly of European Wine-producing Regions \(AREV\)](#), which is the present depository of the entire association, organizational and moral assets of the former CERV.

Thus, AREV has become a European and international spokesman as regards wine industry, intervening with all the institutions and authorities directly or indirectly in charge of European or world policy on viticulture & viniculture and getting involved in all the wine-related fields.

AREV collaborates with the following European institutions and authorities:

- European Commission (Directorates for Agriculture, Internal Market, Trade, Economic Affairs/Eurostat, Environment, Regional Policy, Management Committee for Wine)
  - European Parliament (Wine Intergroup, Committee on Agriculture)
  - Council of the European Union (Commission on Environment and Agriculture, Congress of Local and Regional Authorities)
  - Committee of the Regions (Commission on Agriculture)
  - Assembly of European Regions (AER)
  - International Organization of Vine and Wine (OIV)
  - World Trade Organization (WTO)
  - Food and Agriculture Organization (FAO)
- AREV has been actively involved in the following fields of viticulture & viniculture:
- Common Market Organization for Wine (CMO)
  - Viticulture of adhering countries
  - Viticulture in difficult areas, being directly connected to the Centre for Research, Environmental Sustainability and Advancement of Mountain Viticulture (CERVIM)
  - Fiscality / Excises

- Protection of the European geographical names
- Harmonization of labels
- Organic viticulture
- Genetically modified organisms
- Informatization of accompanying commercial documents
- Wine tourism, European wine roads
- Wine and health
- International Academy of Wine Tasters



|                            |                    |                       |            |                      |
|----------------------------|--------------------|-----------------------|------------|----------------------|
| Bulgaria                   | Georgia            | Italia                | Portugalia | Castilla-La Mancha   |
| Cehia                      | Kakheti            | Campania              | Açores     | Castilla y León      |
|                            | Racha-Lechkhumi    | Emilia-Romagna        | Alentejo   | Catalunya            |
| Croatia                    | Germany            | Friuli-Venezia-Giulia | Madeira    | Euskadi              |
| Istria                     | Baden-Württemberg  | Liguria               | Norte      | Extremadura          |
| Franta                     | /Bayern            | Lombardia             | Romania    | Galicia              |
| Alsace                     | Hessen             | Piemonte              | Alba       | La Rioja             |
| Aquitaine                  | Rheinland-Pfalz    | Puglia                | Arad       | Madrid               |
| Champagne-Ardenne          | Autriche           | Sicilia               | Constanta  | Murcia               |
| Franche-Comté              | Burgenland         | Südtirol              | Iasi       | Navarra              |
| Languedoc-Roussillon       | Niederösterreich   | Toscana               | Prabova    | Valenciana           |
| Midi-Pyrénées              | Steiermark         | Trentino              | Vrancea    | Ucraina              |
| Pays de la Loire           | Umbria             | Val d'Aoste           | Slovenia   | Odesa                |
| Poitou-Charentes           | Kentriki Makedonia | Veneto                | Ungaria    | Bacs-Kiskun          |
| Provence-Alpes-Côte d'Azur | Peloponnisos       | Luxembourg            | Spain      | Baranya              |
| Rhône-Alpes                |                    |                       | Andalucia  | Borsod-Abaúj-Zemplen |
|                            |                    |                       | Aragon     | Tolna                |

Fig.1.Map of the regions or country members of the AREV

### **B. European Network of Wine Cities-RECEVIN**

The VINTUR programme was implemented in the viticulture & viniculture field, within the INTERREG IIIC programme, being coordinated by the “European Network of Wine Cities – RECEVIN”. The RECEVIN is intended to defend with one voice the interests of the local administrations from the entire Europe in matters related to the economic policies on wine industry. This network provides a common platform for exchanging expertise, contact information and for partnership.

Nine European countries are members of RECEVIN (Germany, Austria, Slovenia, Spain, France, Greece, Hungary, Italy,

Portugal), that resulting in the strength of nearly 800 cities across Europe.

The VINTUR project was meant to promote the exchange of knowledge and technology, and to develop actions to increase the quality of the enotourism products. The vine and wine tourism product consists in integrating the interests, the present and potential resources and the services from a grape-growing area into a whole concept.

In this respect, RECEVIN developed far-reaching projects aiming at recognizing the vine and wine tourism in Europe. They are the following:

- *The European Charter on Oenotourism* – a consensual document defining the wine tourism concept at European level and establishing the participation and co-operation strategies for various agents with a view to their development and self-regulation.

- *The European Enotourism Handbook* – establishes the Quality Management System for wine tourism at European level, and defines the method of starting, developing and the recognition of the European Roads of Wine.

- *The European Day of Enotourism* - an initiative that positions this type of tourism as a unique and yet multiple reality in all the member states of the network. The goal of the “Enotourism Day” is to promote the vine and wine tourism worldwide, and at the same time in all the European countries, and to unify the European wine routes’ quality standards. This day is held on the second Sunday of November each year. In the 2012 edition, over 60 wine routes and cities from Spain, Italy and Portugal participated in this event, more than in the former editions.

- *The European City of Wine* – a competition initiated as a part of the advocacy and dissemination of enotourism in Europe. The first edition of the competition was in 2012.

The competition of the European City of Wine takes place, on a rotating basis, in different countries, members of the RECEVIN network. Following the selection, the 2012 edition took place in Portugal, in 2013, it will take place in cities of Italy, in

2014, in cities of Spain and in 2015, in cities of France.



Fig.2. RECEVIN member countries map

This context is a good opportunity for the European wine cities to present the wealth, diversity and their own wine culture, providing a better understanding of the landscape, economy, gastronomy and local heritage.

After a methodical assessment, in accordance with the requirements of the competition, the winning city from Portugal was PALMELA.

As a result of implementing the VINTUR project, two documents were elaborated, representing the basis of enotourism development in Europe.

#### ***The European Charter on Enotourism***

This Charter defines the concept of wine tourism at the European level and establishes a common strategy for all the wine tourism regions in Europe, based on defining goals and commitments of all the involved areas. The report has a wide vision of the sector, emphasizing the concept of “wine-growing culture”, an idea that comprises both the wine-growing aspects of a territory and the tourism in it. This vision offers the opportunity to use wine as a tool to promote the local tourism (niche tourism).

This global approach implies a significant number of participants, from the public and private sectors to the ordinary inhabitants of the wine tourism destinations. We should mention here that some parties described this document as a proposal approaching only the absolute minimum and that it was not exacting enough. Like any other strategic document it comprises certain predetermined values: sustainability of the enterprise economic activities and promoting local development; the need for co-operation among various parties; a collective vision; promoting restoration of buildings instead of new constructions; utilizing local human resources, and improving quality of life of the local residents. The document also mentions the necessity to manage the tourist flows, anticipating some corrective measures, such as utilizing means of public transport, bicycles and walking.

The adherence to the Charter takes the elaborate form of a report that can be seen as a strategic plan for a wine tourism destination. The report includes a diagnosis of the situation, the involvement of its members, common strategic goals, allocation of necessary resources, an action programme and assessment of results.

78 organizations have signed the Charter so far, out of which 64.1% are organizations from Italy and Spain.

#### ***The European Enotourism Handbook***

The same European project developed “*The European Enotourism Handbook*” that establishes the Quality Management System of the European Enotourism, being a first step to implementing the future project entitled “The European Wine Route”. This document, which was inspired by the *European Charter on Oenotourism*, encourages new ideas and points out the necessity to promote wine culture throughout all stages of the tourist programme (before, during and after ending the tour) and in all the aspects related to the value chain. It also emphasizes the *authenticity*, which is an important complementary resource for the enotourism experience and one of the key values of the winemakers (wine cellars), which are many

times oriented to producing handcrafted wines for a demanding and customized market, unlike the mass production model.

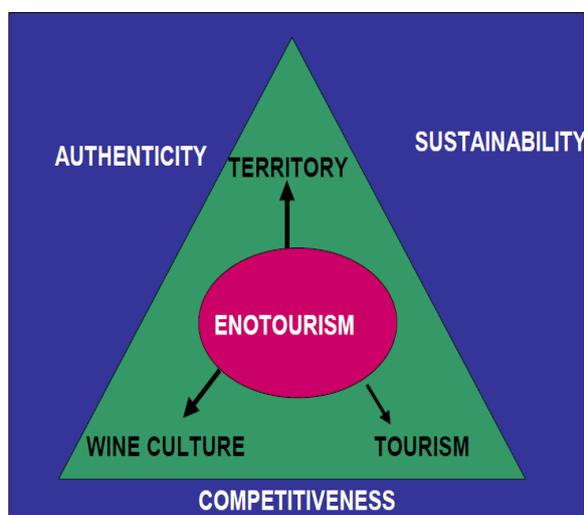


Fig.3. The pillars of the European enotourism

The specific requirements have been laid down for the public sector (local or regional administrations), and for the private one as well, according to what is wished to be offered to a traditional or a wine tourist, i.e.: accommodation, restaurants, shops, travel offices, travel agencies, tour operators, wine cellars, museums, wine shops, wine tasting services and courses.

Each destination has to set up an administrative body in order to supervise and check the adherence process, and to draw up a three-year strategic action plan.

In addition to the logical criteria (Documents of Origin -DO, the promotion itself, the existence of an administrative body, a brand and a logo, proper signage) there are also specific requirements for the destination to have a minimum of six wine factories, that can be visited at least 12 hours per week, two days per week, with 5 complementary services (of which two have to be a restaurant and accommodation premises) and the destination has to promote a fair and reasonable price policy.

Although the wine tourism products offered meet the overall requirements, they are separately analyzed for each subsector. For example, knowledge of a foreign language is considered of high importance for the persons

working in tourism agencies and for the tourism agents as well, to the same degree as it is important for the employees of a restaurant to understand and to know the local wines.

The wine shops, particularly the wine cellars, must have special places for wine tasting endowed with adequate glassware, a shopping area, provide guided tours and meet other specific requirements (toilettes, souvenir shops, etc).

The additional requirements for certification of excellence must also be met, the specific goal being to improve the administration (greater dedication and capacity to make decisions), to increase the number of services and products provided in every destination, to create and to implement control systems (creating enotourism sustainability indicators), and to develop tools for assessing the profile of the demand.

In order to reach this last goal, the administrative body shall create an information collection system and shall generate a profile of the wine services consumer, information that can be subsequently disseminated and analyzed in the entire market.

The members of the business community have also to commit themselves to provide the required information in order to carry out such analyses.

### ***C. The Great Wine Capitals – GWC***

The Great Wine Capitals is a network of nine cities located in both the northern and the southern hemispheres, sharing a common economic and cultural philosophy. What attaches them to one another is the wine industry, strongly represented in their regions. This is the only network comprising regions both from the old and the new world of wine.

The Network was created to encourage the exchange of travels, education and good practices in the economic field between internationally renowned centres: Spain (Bilbao, Rioja), France (Bordeaux), South Africa (Cape Town), New Zealand (Christchurch, South Island), Italy (Florence), Germany (Mainz, Rheinhessen), Argentina

(Mendoza), Portugal (Porto), USA (San Francisco, Napa Valley).

Since 1999, when it was created, the Network has introduced a prestigious annual prize competition entitled "Best of Wine Tourism" Awards.

This international competition was created to reward the wine-making companies from each member city that distinguished themselves by excellence in wine tourism art and culture, the development of a sustainable wine tourism, as well as in providing quality experiences to the public.

Since the launch of the awards, more than 309 properties out of 2099 candidates received prizes, which attests how rigorously are the candidatures assessed.

The organization also created a business network offering ample programmes of information and training seminars, forums and tastings.

The Great Wine Capitals presents an annual report following the carrying out of research studies entitled "International Research Grant". Grant is intended to promote excellence in research and innovation in the wine industry and encourages researching of new and interesting subjects for the network (wine tourism, wine marketing, sustainability).

The programme also supports programmes for the students of the universities from the cities members of GWC.

This network also supports the organization of numerous expert symposiums on investments in the viticulture and viniculture sector, and initiatives in the relevant educational branches. These events are many times held on the occasion of the annual general meetings or of conferences where crucial problems affecting the large world of wine are debated.

Trips of technical or commercial nature are organized for the members of the network.

The know-how exchange is an essential part of the network; thus, each city can benefit from the strong points of its network neighbors.

The Great Wine Capitals developed a tourism network, in order to facilitate inter-regional

travels, if the travel agencies from each city develop wine-related programmes and routes. There are destination specialists in every city, who are able to meet all the requirements for the travel to and from the "Great Wine Capitals".

In this way, all those visiting these cities gain experience and, at the same time, help the cities to make known to the whole world the extraordinary cultural, heritage and geographic resources.

The wine tourism destination Dealu Mare, in the Prahova County, has a poor presence within the European associations for viticulture & viniculture tourism.

Together with the counties of Arad, Alba, Constanța, Iași and Vrancea, they are members of the AREV.

The last international event that took place in Romania, in Alba Iulia, was the International Council of the AREV, in the year 2007. Romania is not a member of the RECEVIN European Network.

#### ***D.Key figures of global wine tourism industry-Consumer profile***

In the year 2011 when the VINEXPO exhibition took place in Bordeaux, "The Great Wine Capitals" presented a report on "The key figures of global wine tourism". This is a very ambitious title, which actually raises great expectations.

"The Great Wine Capitals" launched in 2009 a study on enotourism of various producers, wine cellars, other operators involved in tourism activities in the nine regions of the network. They were contacted by telephone, email or Internet, and they were required to answer to an interview made up of open and closed questions. The participants in the study were 454 producers divided as follows: 102 from Cape Town, 102 from Bordeaux, 68 from Florence, 53 from Mendoza, 43 from Mainz-Rheinhessen, 34 from Bilbao-Rioja, 27 from Porto and 25 from San Francisco-Napa Valley.

As regards the profile of the tourists, it has been found that enotourism is a form of tourism essentially of proximity, since 25% are local visitors, 40% of the visitors are from

the same country, while 35% are foreign tourists.

At a global level, most of the tourists come from the European Union, the United States and Great Britain.

In the European Union, the most tourists come from the Netherlands, Germany and Belgium.

Two-thirds of the tourists are men, while one-third are women.

As regards the age of the visitors, 45% of them are aged between 36 and 55. Persons aged over 56 are also enotourism lovers.

They represent 30% of the total consumers. The remaining 25% represent persons aged between 18 and 35.

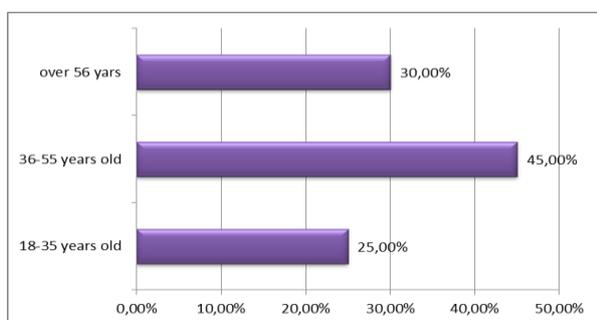


Fig.4. Age of visitors

59% of the producers state that they receive more than 2500 visitors annually.

They also confirm that the activity of enotourism is closely linked to vacations, 70% of the visitors traveling in the summer. Autumn, which is a very important season to wine growers, is preferred only by 15.3 % of the tourists, to the surprise of the researchers.

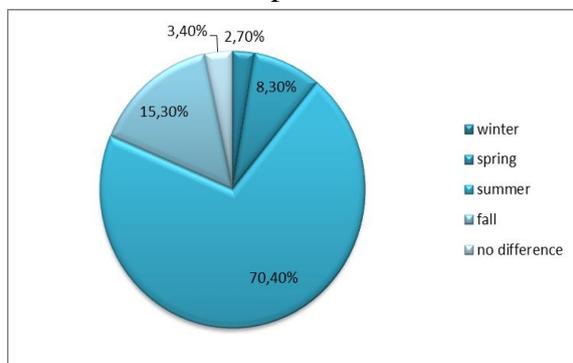


Fig.5. The highest number of visitor by seasons

The expenses per visitor oscillate between 30 and 200 US \$, depending on the region.

In Italy, in Florence more precisely, the average expense per visitor is the highest, namely about 200 US\$. In Napa Valley, 188 US \$ are spent on the average.

In opposition, the lowest amount of money is spent in Bilbao Rioja, Mainz and Cape Town, an average of 30, 40 and 41 US \$, respectively.

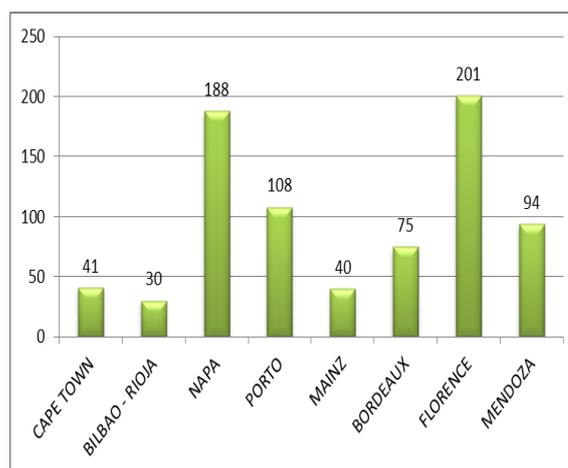


Fig.6. The estimate average expenses of each visitor (in US\$)

As regards the services provided to the tourists, the answer of the wine growers was the following: wine tasting represent 83%, guided tours 75% of the cases, visiting of bodegas and wine cellars 40%, providing accommodation services (hotels, chalets, cottages, etc) 29%, providing sport activities under various forms 20%, providing cultural activities 20%, organizing temporary exhibitions within the wine-making premises 17%, providing therapies based on the benefits of wine and viticulture 4%.

As regards the communication with the customers, the results seem to vary depending on the geographical area, two positions standing out: the “new world” area (America, South Africa, New Zealand) that mostly uses the socialization networks, the Internet and communication by e-mail; and the European area, where the traditional methods are preferred to communicate with the customers: tourism offices, wine fairs, booklets, tour-operators, etc.

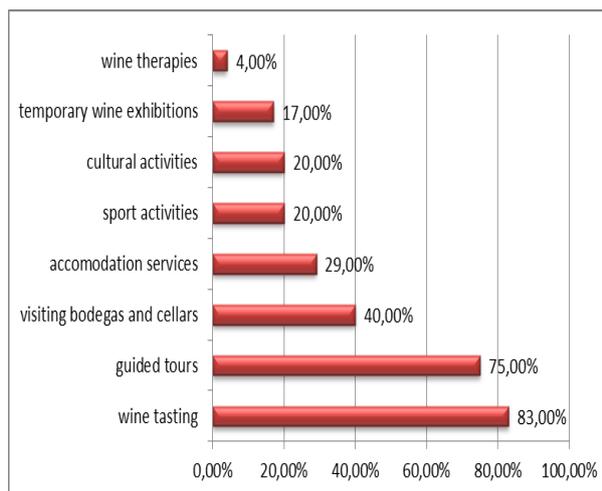


Fig.7. Service provided to the tourists

Analyzing the viability of wine tourism, the following conclusions can be drawn from this study: 78% of the wine producers' income is directly linked to the sale of their products, while the remaining 22% comes from various sources, including the wine tourism.

If their own tourism activities (except for the direct wine sales) are taken into consideration, the incomes can be divided as follows: incomes from accommodation 37%, incomes from restaurants 24%, incomes obtained from various tourist services, such as visiting wine cellars or vineyards, 20%, incomes from sales of goods and gadgets 9% , other incomes 10%.



Fig.8. Incomes from tourist activity

For 74% of the owners, the wine tourism has contributed to the increase of wine sales for the last five years. The Argentineans are more enthusiastic in declaring the benefits of the

wine tourism related to the sales level (98% of them declare so). The Europeans are much more reserved and sometimes even disappointed.

When the wine-makers were asked what were the main benefits brought by enotourism, they answered: image improvement (69%), income increase (62%), a better positioning of the wine farm in the tourism market (54%), increase in the number of visitors (53%), increase in the number of workers (36%), social responsibility (24%).

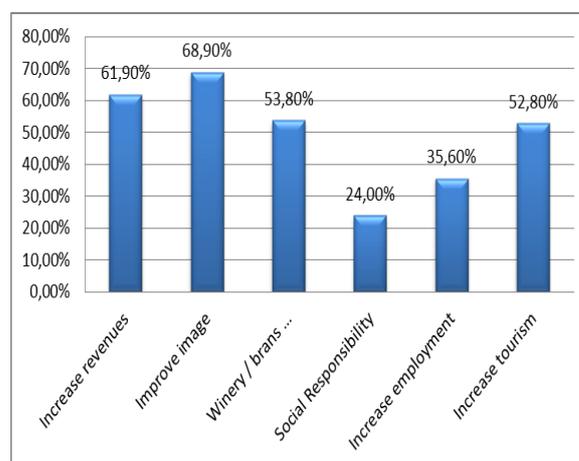


Fig.9. The most important benefits that wine tourism brings to winery and community

When the respondents were asked about the viability of the wine tourism, 68% of them declared that this tourism activity is financially viable.

The most enthusiastic answers came from Napa Valley, where 100% of the respondents considered that this form of tourism is a viable one.

In general, the participants from Spain and Germany declared that they were confident in enotourism.

The Americans consider the direct sales to the tourists as an opportunity to increase the profit margin.

The Europeans' optimism is particularly focused on improving infrastructure and services, training the personnel and establishing strategic partnerships that will certainly generate an increase in this activity.

## CONCLUSIONS

In general, the Romanian market cannot differ considerably from what happens on a global level in this industry.

There are some adjustments related to the particularities of this part of the world, but the Romanian enotourism is a local one. 80% of its tourists are Romanians. Bucharest and the large cities such as Braşov, Timişoara, Cluj, Iaşi, represent the main source of tourists.

As regards the foreign tourists, they come especially from the European Union, from countries as Germany, Italy, France, Belgium, the Netherlands, and from Asian countries as well (Japan and China).

As for the access, they use the means of road transport: cars and tourist means of transport (coaches and minibuses).

As regards the age of the tourists for Romania, the figures are similar to the European ones.

An increase is seen in the number of visiting women. In the future, women can become a strategic segment with an increasing potential, particularly of the premium segment.

Pioneering initiatives are arising, with women specific programmes. Over the last years, wine consumption has increased in women, this leading to creating fruitier wine assortments, with low alcohol content.

As for the accommodation, it is the 3-star rated accommodation establishments that are extensively used in Romania. Over the last years, there have been demands for 4-star rated hotel rooms, too.

Tourist farms and holiday dwellings are also used. The sums of money spent by tourists are difficult to quantify. In general, an average consumption of 60-80 Euros per person is estimated. This amount represents the expenses for accommodation, meal and visits to wine-cellars.

The trip average duration is of 2.6 days, what means in general the week-ends or the long-week-end trips.

The most attractive seasons are summer, the time of holidays, and autumn when grape harvest begins.

In Romania, the wine tourism is generally made in groups formed by friends, workmates or family. The group size is usually of 3 to 5 persons. In the case of foreign tourists, groups are usually larger, of 20 persons on the average.

The most frequent activities are closely linked to the culinary and wine culture in the region: visiting wine cellars, tasting of wines and tasting of local cuisine dishes.

Other complementary activities, such as vineyard tours or visiting specific museums play a much less important role and are, in the same time, activities that are rarely provided.

The most visited vineyards are those located in the Curvature Sub-Carpathians (the Dealu Mare vineyard) because of their proximity to Bucharest and to the main tourist routes in Romania; the Murfatlar vineyard, due to being located close to the Black Sea Coast; the Cotnari vineyard, due to the old wine cellars dating back to the reign of Prince Stefan cel Mare (Stephen the Great), in the 15th century; the wine cellars and the castle of Jidvei, thanks to the good name of the white wines made here.

As the distance between the residence of the tourists and the tourist destinations is small, in general visits are multiple, which means that the great majority of visitors repeat their visits.

As a rule, tourists make online reservations or by phone, directly at the destination place.

The travel agencies do not play a significant role; they usually step in only when group visits are organized.

The recommendations made by the family or friends are some of the most frequent sources of information.

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