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Servitization of wine production: is wine tourism creating value for independent wineries?

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1. Executive Summary: is wine tourism creating value for independent wineries?

Research Objective:

This research aims to understand the dimensions of wine tourism value for wine estates and how these influence their business models for optimal performance.

Key Findings:

- **Multidimensional Intangible and Tangible Value:** Wine tourism value is multifaceted, encompassing financial, extra-financial, HR organizational, sustainability, customer relationship management, and innovation aspects.
- **Prioritizing Dimensions:** While wine quality and tours are fundamental, wineries should focus on enhancing customer experiences through digitalization, sustainability practices, and staff expertise.
- **Visitor Expectations:** Visitors prioritize authenticity, quality, and immersive experiences (wellbeing/nature). Understanding these preferences is crucial for tailoring offerings and maximizing satisfaction.
- **Challenges and Opportunities:** Wineries face challenges in measuring profitability and fostering loyalty through wine tourism. However, there are opportunities for growth through strategic investments in digitalization, infrastructure, and marketing.
-

Recommendations:

- **Digital Transformation:** Implement digital tools to streamline operations, enhance customer experiences, and gather valuable data.
- **Strategic Investments:** Prioritize investments in sustainable practices, staff training, and infrastructure to improve overall value proposition.
- **Customer-Centric Approach:** Focus on understanding visitor expectations and tailoring offerings accordingly to create memorable experiences.
- **Regional Collaboration:** Collaborate with local stakeholders to address challenges related to transportation, infrastructure, and financing.
- **Data-Driven Decision Making:** Collect and analyze data to measure the impact of wine tourism initiatives and make informed decisions. Wine tourism



should be separated from the overall business model to assess its performance and return on investment.

Conclusion:

Wine tourism offers significant potential for value creation for wine estates. By understanding the key dimensions of value, addressing challenges, and implementing strategic recommendations, wineries can optimize their business models and achieve sustainable growth.

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2. Presentation of the research project.

2.1. Introduction

Wine Tourism (WT) stands as a compelling strategy for diversification among wine estates, epitomizing the concept of servitization outlined by Vandermerwe & Rada (1988), whereby wineries integrate services to support wine sales and enhance overall performance. However, despite its potential, winery owners and managers often struggle to grasp the full impact of wine tourism on their businesses. This research endeavors to delve into the dimensions of a wine company's overall performance influenced by wine tourism. While some studies (Senkiv et al., 2022; Tafel & Szolnoki, 2020) have reported the positive impact of wine tourism on rural territories, assessing the value creation at the scale of individual wine estates remains challenging due to the industry's lack of formalized financial data, especially for independent wineries (Festa et al., 2020). Our study aims to unravel the structure of wine tourism value for wine estates and the consequent evolution of their business models for optimal performance.

2.2. Our research questions

- 1. What dimensions constitute the value of wine tourism for wine estates?**
- 2. What are the value dimensions for wineries to prioritize so they achieve their WT goals?**
- 3. How are these dimensions perceived by customers and do they lead to a better Customer Relationship Manager (CRM) or loyalty?**



2.3. Methodology and Plan

To address these questions, we have devised a threefold mixed-method study. The initial exploratory phase involves qualitative analysis through interviews with owners, managers, and employees of Best Of Wine Tourism award-winning wineries in Bordeaux and Mainz regions. Drawing on servitization literature, we crafted a question catalog to capture the perceived tangible and intangible dimensions of wine tourism value from the wine estate's perspective. The synthesis of the qualitative analysis supported the design of a quantitative survey to pass onto wine producers of both regions. Lastly, a quantitative study has been conducted on visitors to address the third research question, examining their perception of wine tourism value dimensions and their impact on customer relationships, loyalty, and acquisition. A juxtaposition of these quantitative studies enables a comparative analysis of producer and consumer viewpoints, facilitating the development of an Importance-Performance Analysis (IPA) matrix (Azzopardi & Nash, 2013; Martilla & James, 1977).

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2.4. Managerial implications

This research aims to elucidate the managerial dynamics of wine tourism for wineries, helping them to optimize asset utilization, prioritize investments, develop best practices and navigate the organizational challenges associated with diversification strategies. By fostering wine tourism innovation management, wineries can maintain competitiveness and foster sustainable growth, benefiting all stakeholders within the wine region ecosystem.



3. The team

Our team is composed of two main partner establishments: Kedge Business School and Geisenheim University, as we designed a study comparing French and German wine tourism cultures.

3.1. Leading actors

Claire Lamoureux, Grant recipient

As a Ph.D. student at KEDGE Business School and Bordeaux University, Claire leverages over 8 years in the wine industry and 3 years in higher education. Her research focuses on the global performance of wine companies and wine tourism business models. Prior roles include Business Development Manager at KEDGE and various positions in wine estate transactions and customer management.



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Professor Tatiana Bouzdine

Tatiana Bouzdine-Chameeva, Senior Professor in Operations Management and Information Systems, holds a PhD in Applied Mathematics from Moscow State University and an M.B.A. from the University of Minnesota. With two habilitations, she specializes in decision support, DEA, and operations research. A wine management expert, she led research at the Wine and Spirits Management Academy in Bordeaux, garnering awards like the JSPS fellowship and numerous prizes for publications in renowned journals.

Professor Gergely SZOLNOKI

Gergely Szolnoki completed his PhD at Justus Liebig University, Giessen, and has been at Geisenheim University Senior Professor of Market Research. His expertise lies in wine business research, teaching undergraduates and MSc students, and mentoring PhD candidates. He has authored numerous articles and books in German, English, and Hungarian, spanning market research, consumer behavior, market analysis, wine sensory evaluation, and social media's role in the wine industry.



3.2. KEDGE Business School students

Lénaé MARCHESSEAU

Master student in master's in management, Lénaé has worked as an Events and Communication Assistant at Bordeaux Wine Council (CIVB), managing operations for 100% Bordeaux Wines in oyster huts, organizing the Bordeaux Wine Festival's restaurants-cellars event, and overseeing ticketing services. Currently, since September 2023, she is serving as a Customer Success Assistant at Namastrip, offering personalized services, managing bookings, organizing retreats, handling e-commerce, and ensuring customer satisfaction and website improvement.



Valentine MARCK

Graduated from Vatel Hotel & Tourism Business School, Brussels in 2022, and Valentine pursues MSc Wine & Spirits Management. Experienced in sales at Château du Carrubier, handling business development, customer follow-up, and export to the USA and Ireland. She also worked at Villa Lario, Italy, planning events and managing F&B and housekeeping tasks. Previous roles at The Woughton House, MGallery by Sofitel, included food & beverage services in restaurant, bar, and events.



3.3. Geisenheim University x BOKU Universität für Boden Kultur

Victoria Hochmayer

Victoria is currently enrolled in a joint master's program at the University of Natural Resources and Life Sciences in Vienna, partnered with Geisenheim University. Holding a bachelor's in international Wine Business from Krems, her expertise spans cellar management, marketing, sales, and distribution. She manages her family business in Weinviertel region. Her practical knowledge is enhanced by multiple internships, while her soil sampling services across Austria contribute to agricultural sustainability.



4. Study 1: exploratory phase, interviewing Best Of Wine Tourism award winning wineries

4.1. Best Of Wine Tourism award-winning wineries' experience of WT.

From November to December, we designed the question catalog for producers, encompassing both tangible and intangible dimensions of wine tourism value to assess its impact on wine estate performance. The finalized catalog was tested on winery owners and managers in January 2024. Work was distributed by GWC Region, involving contact with award-winning wineries in "Innovative Wine Tourism Experience" and "Sustainable Wine Tourism Practice" categories, conducting interviews, and transcribing them. In February 2024, a total of fourteen winery owners and employees were interviewed. The list of interviewees is described in Table I, below.

Table I List of the interviewees.

Bordeaux wineries	6 Interviewees
Chateau 1 Libourne	Communication, Commercial and Venue Manager
Chateau 2 Sauternes	Business Development and Tourism Manager
Chateau 3 Saint Emilion	Tourism and Commercial Manager
Chateau 4 Barsac	Tourism Manager
Chateau 5 Saint Emilion	Family owner
Chateau 6 Saint Emilion	Family owner
Mainz wineries	8 Interviewees
Weingut 1 Bechtheim	Winery Owner and the Tourism and Office Manager <i>(currently retired and a family member)</i>
Weingut 2 Selzen	Winery Owner and the Customer Service and Event Manager
Weingut 3 Essenheim	Winery Owner and the Sommelier and Sales Manager
Weingut 4 Guntersblum	Winery Owner and the Event and Tourism Manager

Regrettably, we encountered a higher rate of refusals to participate in interviews in the Bordeaux region compared to Rheinhessen, resulting in a limitation on the



number of interviewees. Nevertheless, we succeeded in conducting interviews with a diverse range of award-winning estates, varying in size, positioning, and appellations, to ensure the project's content is comprehensive and cohesive. The Bordeaux wineries' staff structure led us to interview only the wine tourism manager when the owners were not living on site; in the case they were, we directly exchanged with the owner, who was also the main wine tourism head. In Rheinhessen, Victoria Hochmayer conducted face-to-face interviews during a two-day visit to the region. Due to the family structure of businesses in the region, Victoria could interview one family owner and one employee of each wine estate who accepted to answer our questions.

Interviews underwent transcription using the online software *Happyscribe*, followed by manual verification by the interviewers. This process yielded 4 hours and 50 minutes of interviews in German and 3 hours and 41 minutes in French, resulting in 225 pages of transcripts.

The qualitative data was augmented with information from interviewees' websites and communication channels, all coded abductively. Open coding utilized the question catalog structure, supplemented by emerging codes. Axial and selective coding stages were conducted regionally and compared across countries to reach a consensus. We used MaxQDA (24.5.0) to ease the qualitative analysis process and produce visuals of this report.

4.2. Results and synthesis

4.2.1. The dimensions of wine tourism's value

As demonstrated by the recent study of Szolnoki et al., (2022), run in the post-covid period, European wineries were not as focused on CRM as new world ones. Therefore, the main unexpected result of our analysis was the prominence of customer relationship management (CRM), being the main motivation of the wine tourism and the main economic outcome. Surprisingly, the role of the customer database increase overshadowed traditional financial considerations, if return on investment was not straightforward calculated, the growth and quality of the customer database was cited as the created value. This shift underscores a fundamental change in priorities, where nurturing and understanding customer relationships



have become key for success. We could also involve the high quality-profile of these award-winning wineries in these results. Figure 1, below, represents the main themes and categories defined at the end of the final selective phase of coding.

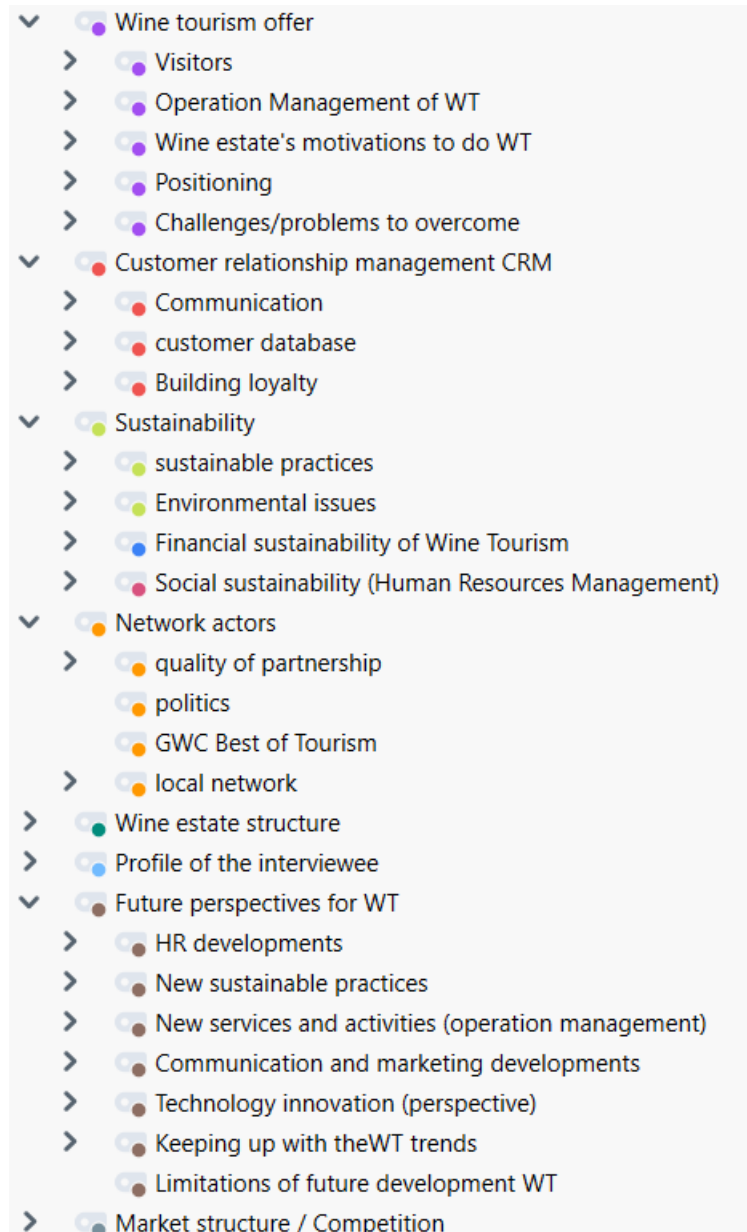


Figure 1. Code tree of the qualitative analysis of transcripts

Through our investigation, the three essential pillars of sustainability (Purvis et al., 2019) emerged as crucial dimensions in the value of wine tourism: Environment, Social, and Economics. These pillars form the foundation upon which sustainable practices and long-term viability are built within the industry. By prioritizing these aspects, wine tourism can thrive while fostering positive impacts on both local communities and the natural environment.



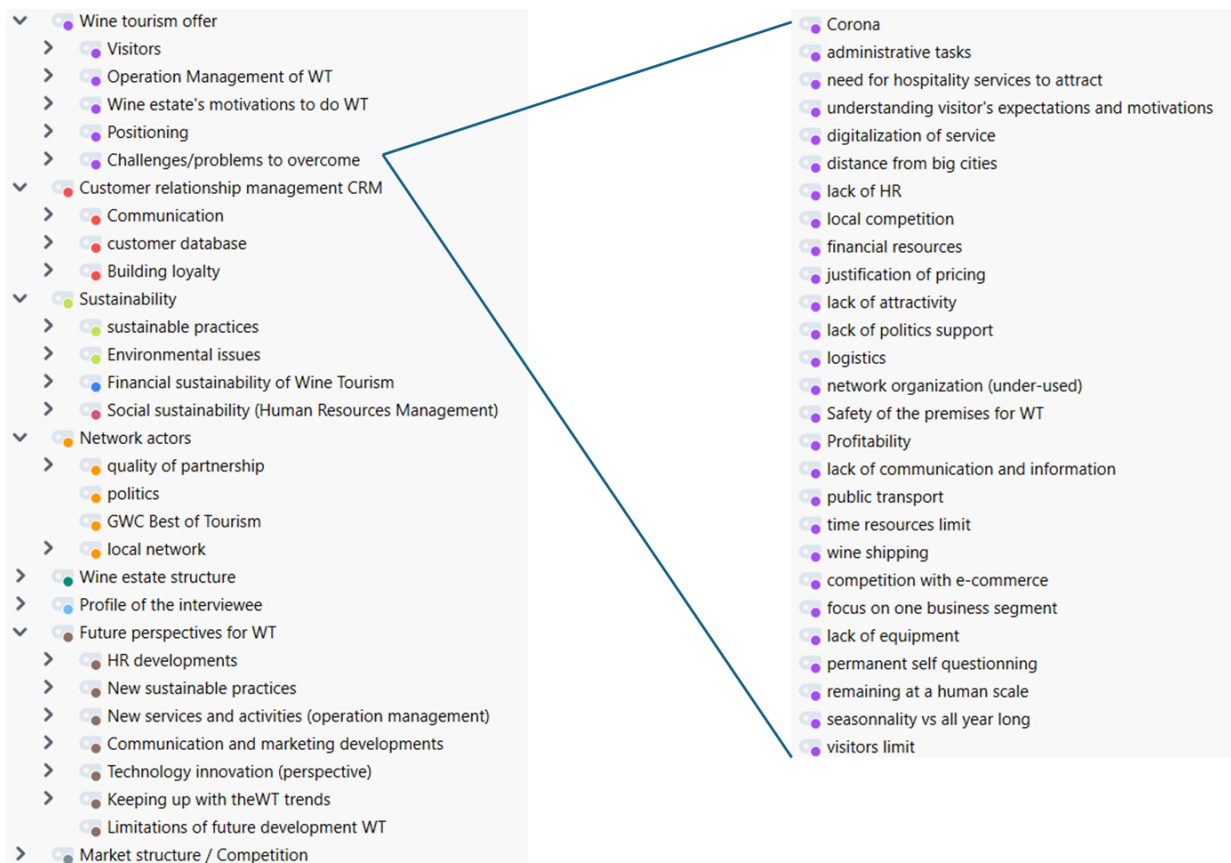


Figure 2. Zoom into “Challenges/problems to overcome” category

Based on Figure 2 (above), which represents the list of challenges reported by the interviewees, we could organize the main struggles met when developing wine tourism into the following categories (table II.) :

Table II Challenges of Wine Tourism

External challenges			Internal factor		
Global factors	National policies	Regional network	Operation Management	Marketing	Technology
Covid-19	Administration Politics support	Hospitality infrastructure	Logistics	Understanding visitor's needs and expectations Pricing E-commerce Market segment Attractivity	Digitalization Communication
		Distance from big cities	HR		
		Local competition	Financials		
		Politics support	Safety		
		Public transport	Profitability		
			Time - Seasonality		
			Shipment		
			Limit of visitors		



This list is crucial for understanding the constraints on development and value creation. Overcoming these challenges must involve the regional stakeholders to maximize wine tourism development.

Overall, we have extracted five direct and explicit dimensions of wine tourism value for wineries and their stakeholders :

- Increasing Customer database and customer relationship.
- Harmonious sustainable development of the winery.
- Social impact at the scale of the winery and the region (human resource management and local connections)
- The openness to innovation.

Two other dimensions were understated following our interviews, and must be confirmed in the next study:

- Financial profitability
- Visitor's satisfaction

The total of these seven points will be evaluated in the [second study](#), which will involve a quantitative survey of winery managers in the global regions of Bordeaux and Mainz.

4.2.2. Fundamental differences between Bordeaux and Mainz region in the wine tourism perception

In Rheinessen region (Mainz, Great Wine Capital), the focus lies on confronting challenges head-on, implementing effective labor division strategies, and organizing wine tourism initiatives to attract visitors. Contrastingly, Bordeaux wineries prioritize financial management, cultivating extensive networks within the industry, and optimizing human resources for maximum efficiency. While Mainz interviewed wineries emphasize overcoming obstacles and promoting tourism experiences, Bordeaux interviewees' attention is directed towards financial stability, networking prowess, and harnessing human capital for sustainable growth and development in the wine sector. These connections are showing in Figure 3, in the next page.



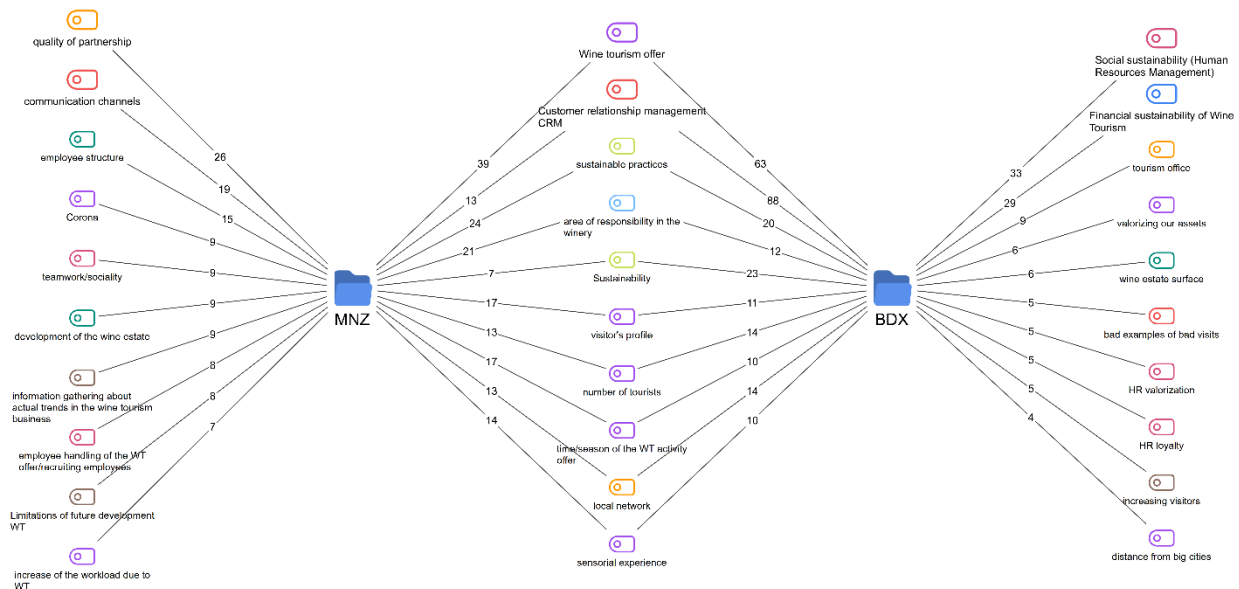


Figure 3. Two-case Model mapping of the most frequent codes between Bordeaux and Mainz region

4.2.3. Adapting future developments

The main future trends reported by our interviewees were described as such:

- **Communication and Marketing Developments**

- Enhance Communication and Recognition: Increase brand visibility and awareness.
- Expand B2B Opportunities: Develop stronger relationships with businesses for partnership and sales.
- Strengthen Online Presence: Improve website, social media, and digital marketing efforts.
- Drive Visitor Traffic and Loyalty: Implement strategies to attract and retain visitors.
- Boost Direct Sales: Increase local sales through the winery's own channels.
- Stay Updated on Trends

- **Conduct Market Research:**

- Gather information and monitor industry trends.
- Observe New Services: Stay informed about innovative offerings in the wine tourism sector.

- **Develop New Services**

- Expand Events: Organize more frequent and diverse events and activities to attract visitors.
- Enhance Food Offerings: Offer a wider range of food options to complement wine tasting experiences.



- Explore Accommodation: Consider developing accommodation options, such as on-site lodging or partnerships with local hotels.
- **Prioritize Sustainability**
 - Implement Sustainable Practices: Align with sustainability goals, including public transport options, sustainable wine tourism activities, and offering alcohol-free options to address health concerns.
- **Invest in Human Resources**
 - Long-Term Planning: Implement a strategic approach to recruitment and training to ensure a skilled workforce.
- **Embrace Technology and Innovation**
 - Leverage Virtual Reality: Explore virtual tours and experiences to enhance the visitor experience.
 - Digitalize Processes: Modernize booking systems and customer relationship management (CRM) databases.



5. Study 2: Value dimensions of the wine tourism for wine estates managers/owners, the regional surveys

5.1. Design of the survey

Based on the findings from the initial interviews, we developed a quantitative survey to assess the significance of the identified dimensions of wine tourism for wine estate owners and managers across the Bordeaux and Rheinhessen regions.

The survey was divided into seven sections as determined by [study 1](#):

- **Financial:** Perceived costs and benefits of wine tourism
- **Extra-Financial Benefits:** Non-monetary advantages of wine tourism
- **HR Organization:** Human resource management aspects
- **Challenges:** Obstacles limiting in wine tourism growth
- **Environmental Protection and Sustainable Practices:** Importance of sustainability
- **Customer Relationship:** Managing customer interactions
- **Innovation:** Adoption of new ideas and technologies

5.2. Data collection

In Bordeaux, data collection was conducted by AMS Conseil, a junior company affiliated with KEDGE Business School. They collected data through phone interviews over a three-week period in April 2024. In Mainz, Victoria Hochmayer oversaw the online launch of the German version of the survey during June 2024.

We gathered 109 responses from Bordeaux and 134 responses from Rheinhessen. While the number of responses from Mainz producers appears higher relative to their overall vineyard surface, it's important to note that a smaller percentage of them engage in wine tourism. As a result, we collected only 54 complete answers from Rheinhessen, ensuring that the proportions of responses from each region remain representative. In each table, the number of respondents to the specific question is mentioned.



	Total surface of vineyard	Total number of wineries	Total of number of respondents (no. of resp.)
Bordeaux region ¹	100 000 ha	5400 ²	109
Rheinhessen ³	27 500 ha	438	134 - 58

5.3. Results

5.3.1. Surveyed groups of producers

5.3.1.1. Distribution on the regions

The following maps illustrate the distribution of responding wineries across their respective territories. This allows us to visualize the coverage of each region. Notably, we are examining two vineyards that differ significantly in size, geographical spread, and population density.

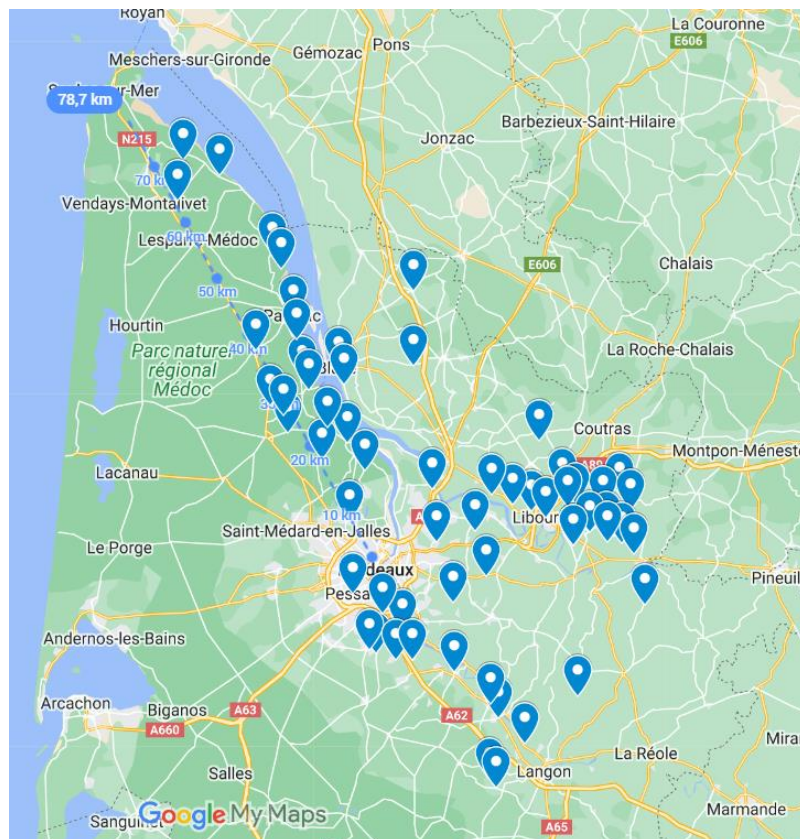


Figure 4 Map of respondents in Bordeaux region

¹ <https://nouvelle-aquitaine.chambres-agriculture.fr/filieres-et-territoires/productions-vegetales/viticulture/> - 10 000 ha pulled-out in 2024.

² <https://www.bordeaux.com/fr/Notre-savoir-faire/Metiers/Viticulteur>

³ <https://www.winesofgermany.com/our-regions/growing-area/70/rheinhessen>



While density and distance vary greatly within Gironde (Figure 4.): 78,7km for the further distance from Bordeaux city, and population densities of 665 inhabitants (inh) /km² in Bordeaux, 41 inh. /km² in Médoc, 121inh. /km² in Libourne/Saint-Emilion, and 50 inh. /km² in Langon ⁴, we can observe distinct patterns in Rheinhessen (Figure 5.), involving smaller distance to Mainz⁵ and overall denser territory (250 inh/km²).

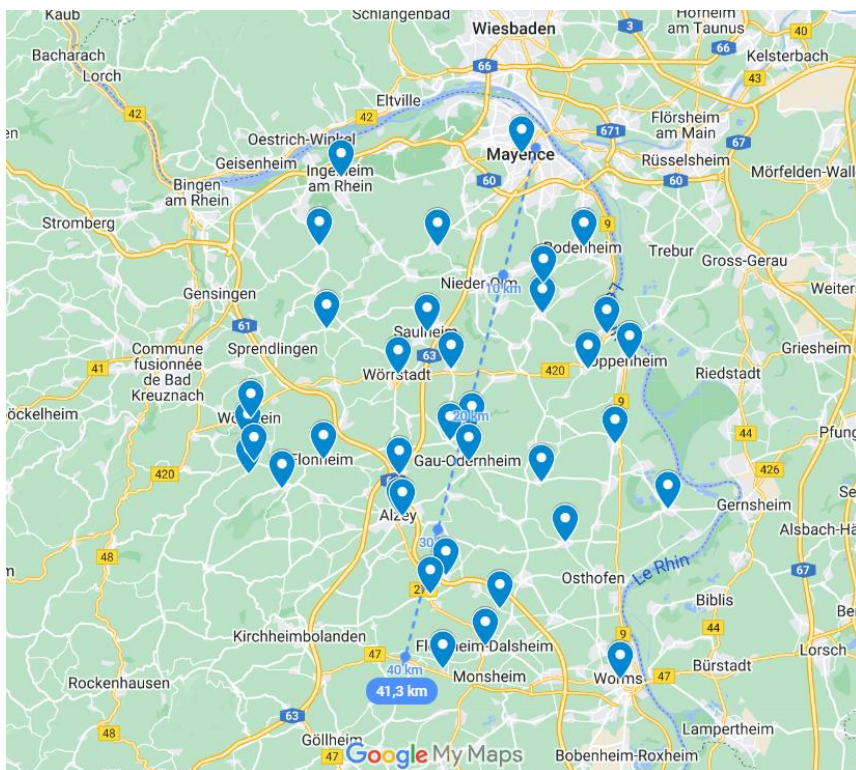


Figure 5 Map of respondents in Mainz region

5.3.2. Average surface and production

Despite a smaller average size, the German respondents seem to have a bigger production, meaning higher yields, and they mainly produce white wines, while their French counterparts produce in majority red wine.

GWC Region	No. of resp.	Average surface of vineyard (in ha)	Average surface of individual vineyard of the region (in ha)*
BORDEAUX	107	37.51	19
MAINZ	85	26.96	60
Total	192	32.84	

⁴ Website of Institut National de la Statistique et des Etudes Economiques <https://www.insee.fr/fr/statistiques/1405599>

⁵ "Bevölkerungsstand 2022, Kreise, Gemeinden, Verbandsgemeinden" Statistisches Landesamt Rheinland-Pfalz. 2023.



*calculation based on table in [Distribution on the regions.](#)

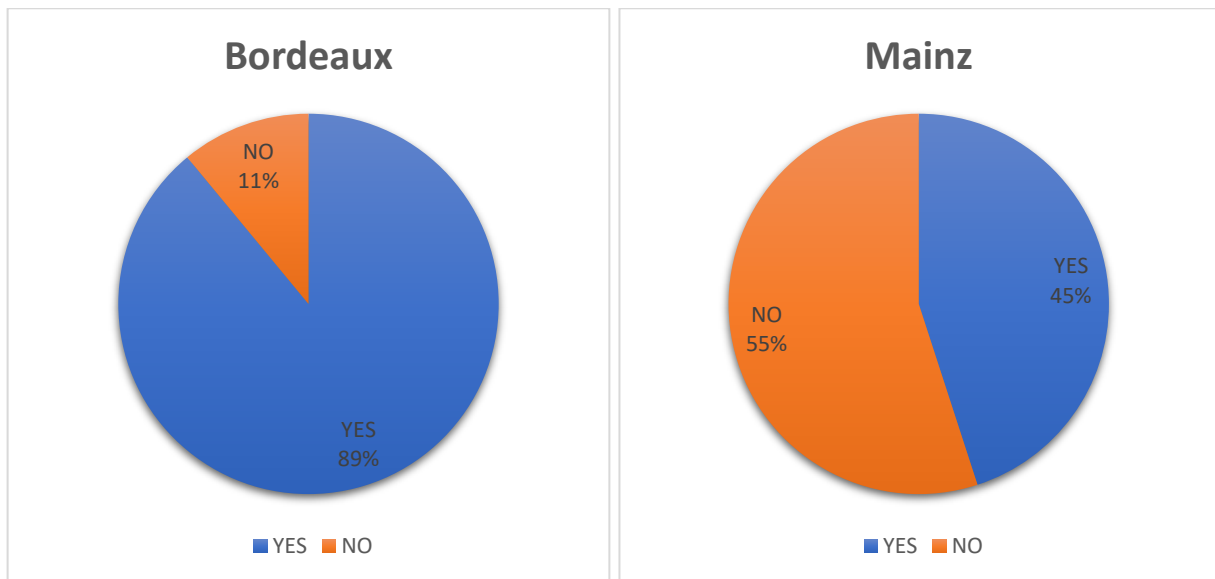
We note that the respondents do not represent average size of their region. Bordeaux respondents are bigger in size than the 19-ha average size, and Mainz respondents are smaller in size than their region average. In Bordeaux region this could be explained by the minimum size required to be able to develop wine tourism and be available to answer surveys, while in Mainz 24 collective cellars could be affecting the average size calculation.

GWC Region	No. of resp.	Average prod (L)	Average Red production (in%) *	Average White production (in%) *	Average Rosé production (in%) *
BORDEAUX	107	221 052	87	33	14
MAINZ	85	258 119	21	67	12

*The average percentage of production is calculated based on the number of wineries reporting a specific wine color. For example, on average, producers in Bordeaux who declare producing red wine account for 87% of red wine production. It's important to note that the total percentage of all wine colors may not add up to 100% because some wineries may not produce all three colors.

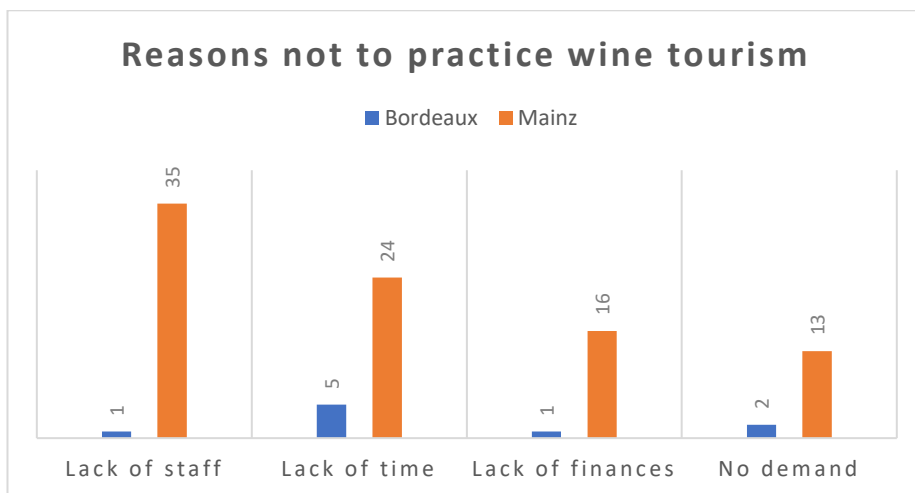
5.3.3. Wine tourism practices and offers

The initial survey question asked if the wineries offered wine tourism activities to their visitors on-site.



While most of Bordeaux producers are now open to wine tourism, this practice is less prevalent in Mainz, with less than half of the respondents indicating their participation.

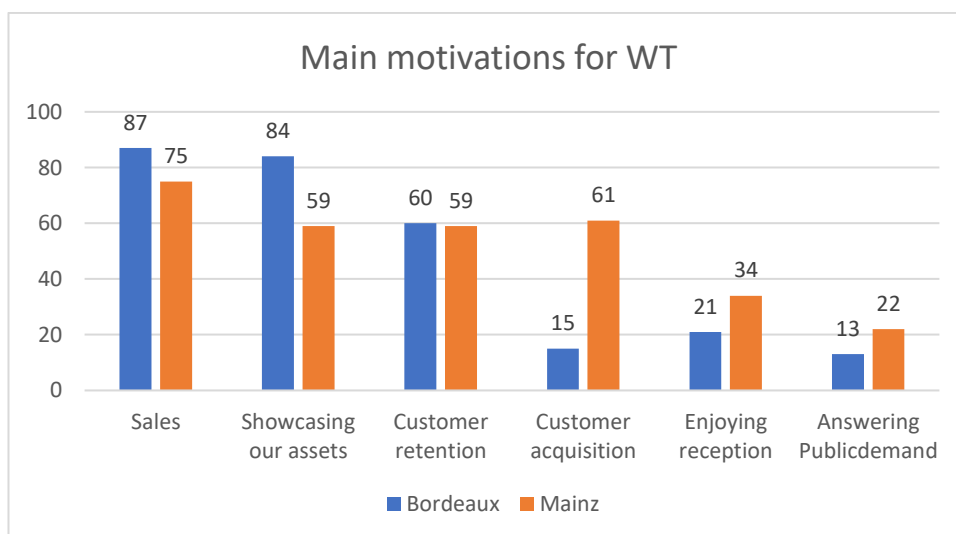
The wineries that answered 'No' to the first question provided the following primary reasons for not engaging in wine tourism:



Additionally, we found the following remarks in the comments section, explaining their decision not to engage into WT :

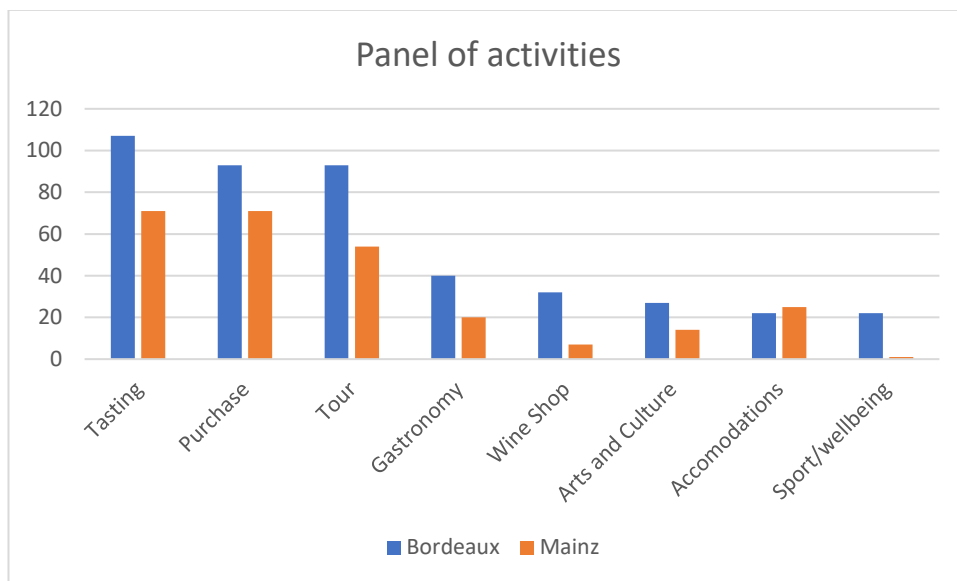
- The size of the wine production :“big enough, no need for further development”
- The type of customer that does not practice WT: “export only”; “other clients”
- Their condition to organize a visit : “on booking only”
- Lack of time: “too busy”

5.3.4. Motivations to practice wine tourism



Among the primary motivations of wineries, **'Increasing Sales'** emerged as the top priority for both regions. However, in Mainz, **'Customer Acquisition'** was deemed more important than **'Showcasing Assets'** and **'Customer Retention.'** We will analyze the [results](#) of the customer part to determine if these motivations are being fulfilled.

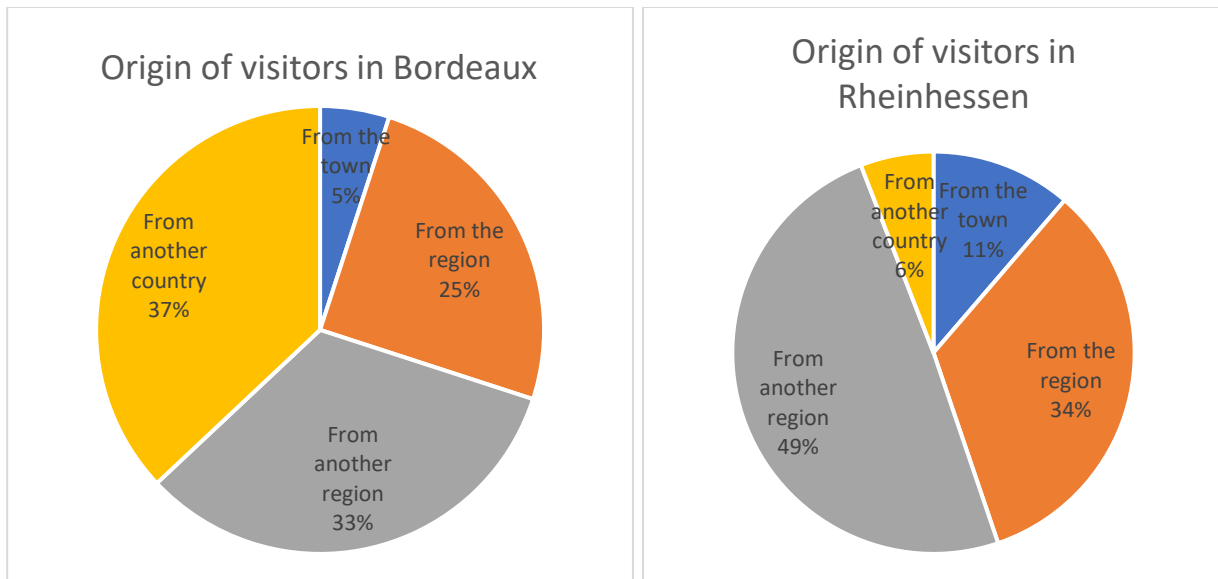
To achieve their goals, wineries are developing the following activities for their visitors:



All wineries engaged in WT offer wine tasting, tours, and the option to purchase wine on-site. However, only a small percentage have a dedicated wine shop available.

To understand and reflect on the difference between the two regions' practices described further, it seems appropriate to mention their respective visitor's typology here. Notably, visitors' origin is an interesting reason in the response difference between Bordeaux and Mainz.



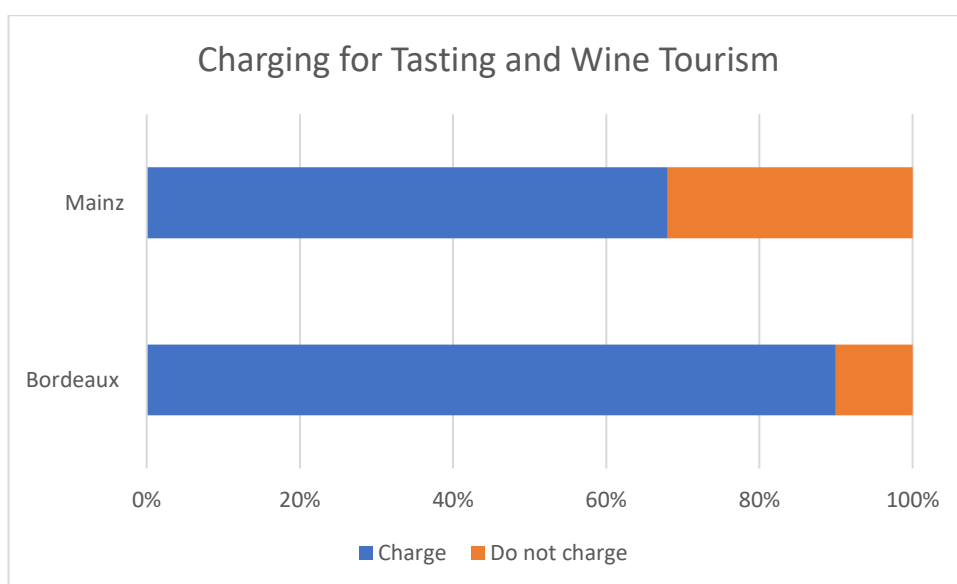


More detailed information regarding visitor demographics will be presented in the [study 3 part](#).

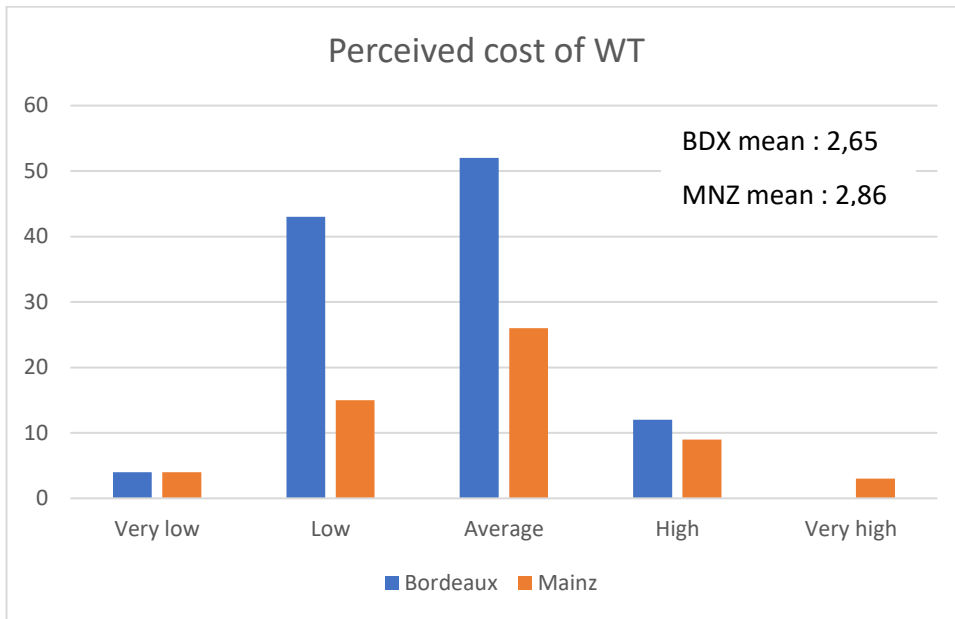
5.3.5. Financial and extra-financial gains

As reported in the interviews, the financial profitability of wine tourism remains a challenge for many winery managers.

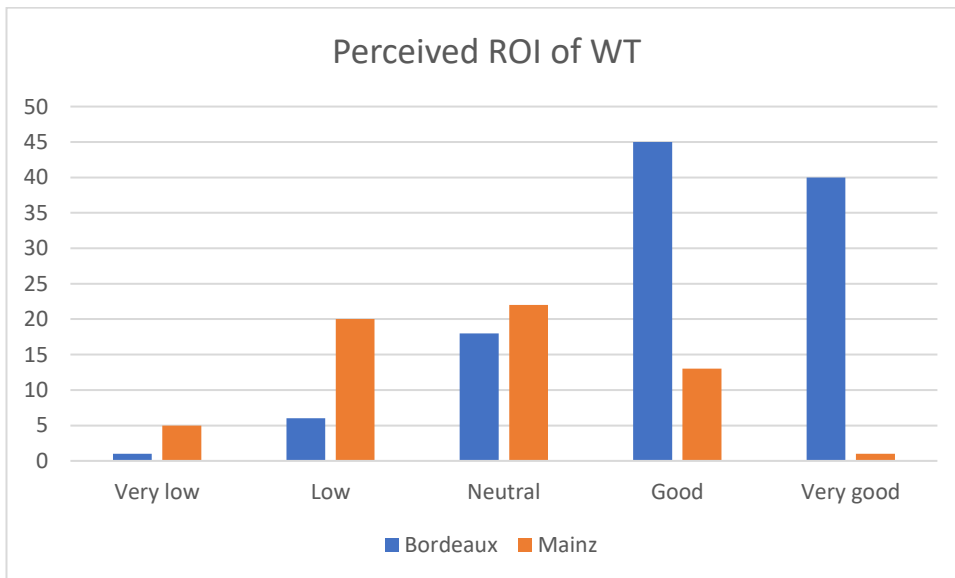
While most wineries charge for wine tastings and wine tourism activities like tours, it's surprising to note that some still offer these services for free. In such cases, direct wine sales are the sole revenue source from wine tourism.



Nonetheless, in both regions, wine tourism is not perceived as a costly occupation.



This is confirmed by a positive perception of **wine tourism's return on investment (ROI)**. The German wineries' more moderate view might be attributed to challenges in value proposition. This is further supported by the [satisfaction ratings regarding prices among visitors to Mainz wineries](#).



In terms of **average visitor expenditure**, it is important to report that some wineries are still unable to answer this question due to lack of monitoring of purchase during

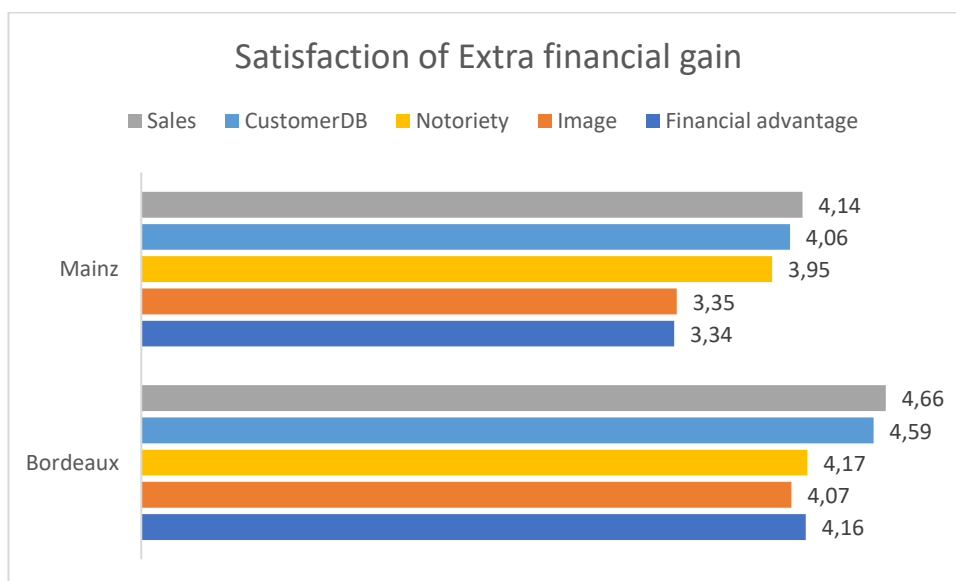


and after visit. The variation is due to the range of activities too, i.e. a night stay will raise the average expense significantly.

GWC Region	no. of resp	Average expenditure (mean) in EUR.	Min. expense (in EUR)	Max. expense (in EUR)
BORDEAUX	103	64.18	5	300
MAINZ	53	101.21	10	500

Despite lack of monitoring and formalism in purchase data, it is reassuring to see that producers engaged into WT have a positive perception of ROI.

The **overall satisfaction** (on a scale from 1 to 5), regarding the wine tourism activity is positive. **Financial advantage** (in dark blue) is confirmed to be one the least satisfying dimension, however, producers are satisfied of the sales and the customer database improvement. Notoriety and Image are also satisfied.



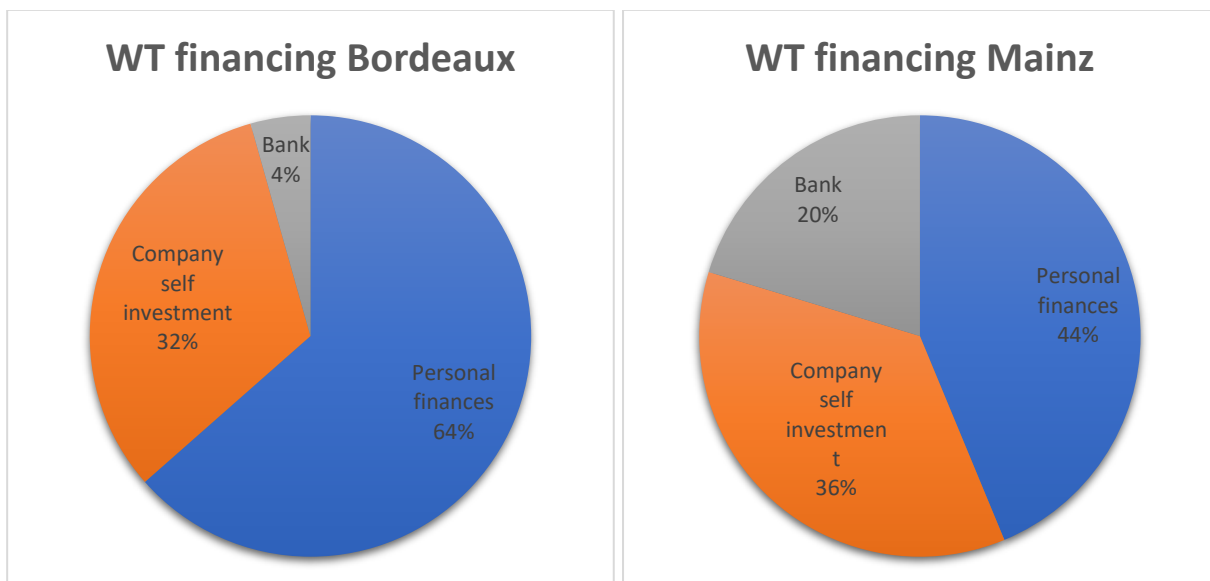
These non-financial benefits are likely a significant factor in the overall satisfaction of winery managers with WT.

Bordeaux wineries demonstrate higher overall satisfaction, and a long-term strategy for wine tourism is considered more important in that region (on a scale of 1 to 5).

GWC Region	no. of resp	Mean Global Satisfaction	Mean of Importance of Long-Term Strat.
BORDEAUX	110	4.23	4.21
MAINZ	64	3.06	3.73



Financing business development is often a limiting factor, when not able to demonstrate potential profitability, business partners and financiers are harder to convince. Therefore, we asked respondents about their sources of funding for wine tourism. Funding for wine tourism has been discussed in previous literature and interviews. If in majority, WT is self-funded by shareholders private funds or self-investment of the company, we can note that banks appear more willing to support wine tourism development in Germany compared to France.



5.3.6. Human resources management

GWC Region	Mean no. staff	Max. no. staff
BORDEAUX	3.06	23
MAINZ	2.68	10

Wineries engaged in wine tourism employ an average of 3.06 dedicated staff members in Bordeaux and 2.68 in the Mainz area. This difference can be attributed to the higher concentration of larger wineries in the Bordeaux region.

During the interviews Bordeaux wineries mainly, reported difficulties to hire experienced staff and it is confirmed in the next part [Challenges and limiting factors](#) If both regions agree on the “knowledge of wine and viticulture” as the most important criteria to recruit someone in charge of wine tourism, the rest of their



requirements varies. Receiving more [international visitors](#), Bordeaux wineries pay more attention to the international dimension of previous professional experience in candidates, while it comes last in Mainz.

Importance of Recruitment criteria (from most frequently answer to the least)	BORDEAUX	MAINZ
1	Knowledge	Knowledge
2	International	Tourism
3	Tourism	Network
4	Network	International

Recruitment sources also vary significantly. While Bordeaux wineries often utilize specialized and generic job websites, Mainz wineries rely more heavily on word-of-mouth, such as personal recommendations and spontaneous applications.

These differences could be attributed to the low population density in some areas of Bordeaux, such as Médoc, which can make it challenging to attract experienced staff. Additionally, the closer-knit 'family' structure of Mainz vineyards may contribute to a preference for internal or personal referrals.

Mean to recruit in order (from most frequently answer to the least)	BORDEAUX	MAINZ
1	Specialized website	WoM
2	General HR websites	Spontaneous
3	WOM	Specialized / generic Websites
4	Spontaneous	Recruitment agency
5	Recruitment agency	-
6	Interim	Interim

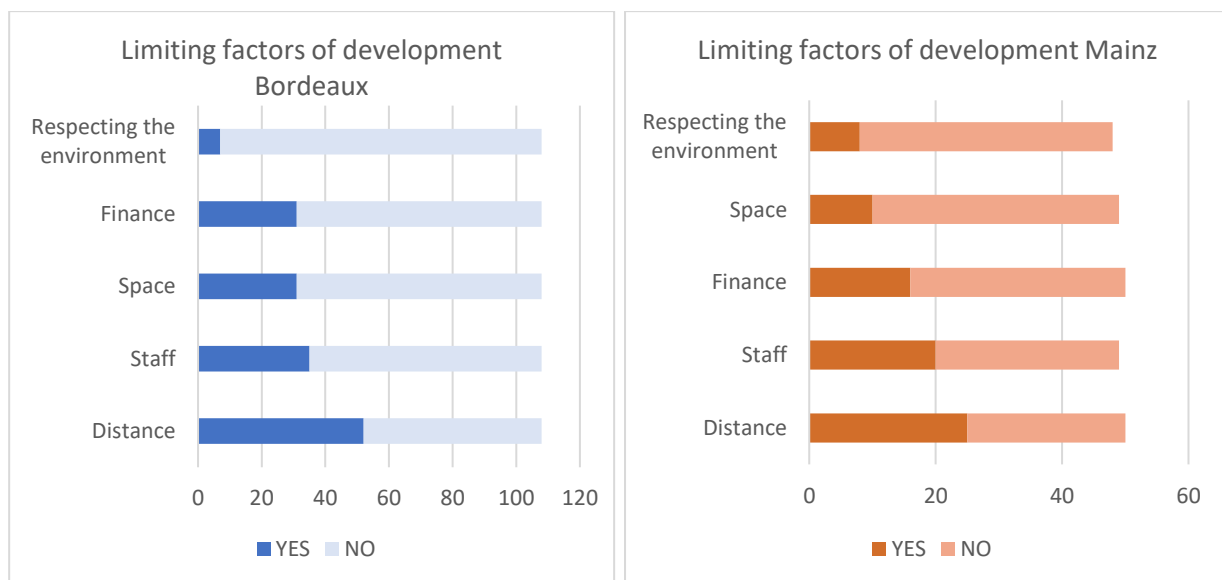


5.3.7. Challenges and limiting factors

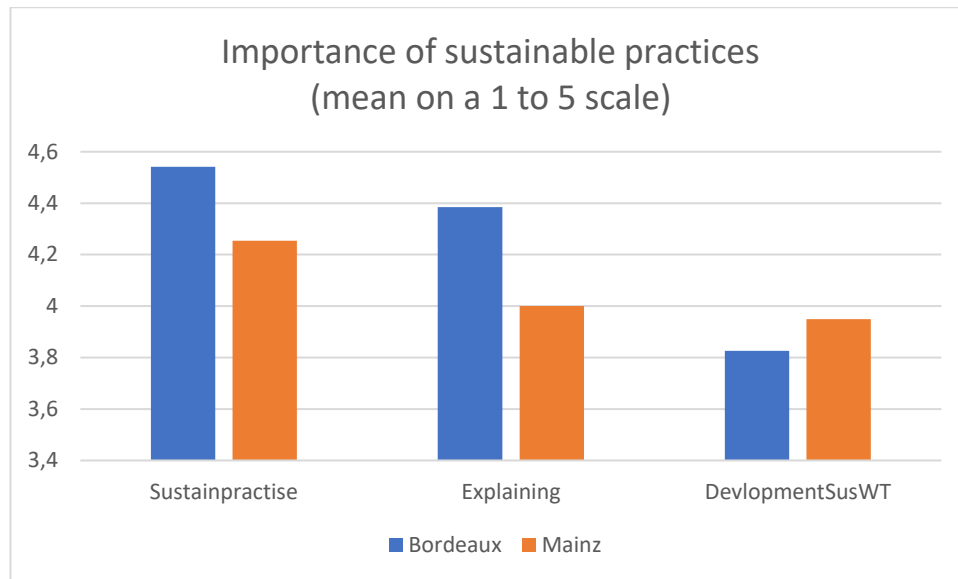
When asked about the challenges they face in implementing wine tourism, significant differences emerged between the two regions.

Main difficulties	BORDEAUX	MAINZ	Main difficulties
Hiring	65	42	Seasonality
Location	65	39	Infrastructures
Seasonality	56	33	Location
Funding	44	26	Customization
Region network	28	23	Customer expectations
Infrastructures	23	21	Hiring
Customization	17	20	Local network
Local network	16	16	Region network
Customer expectations	9	14	Funding
<i>no. of resp.</i>	108	52	

Nonetheless, they agree more on the limiting factors to their WT development. As such, the location of their wine estates, far from main cities and the lack of infrastructure come back often. These are external factors that wineries must endure. This echoes to the need for transportation mentioned later in [Innovation](#) part.



5.3.8. Sustainable practices and impact on wine tourists



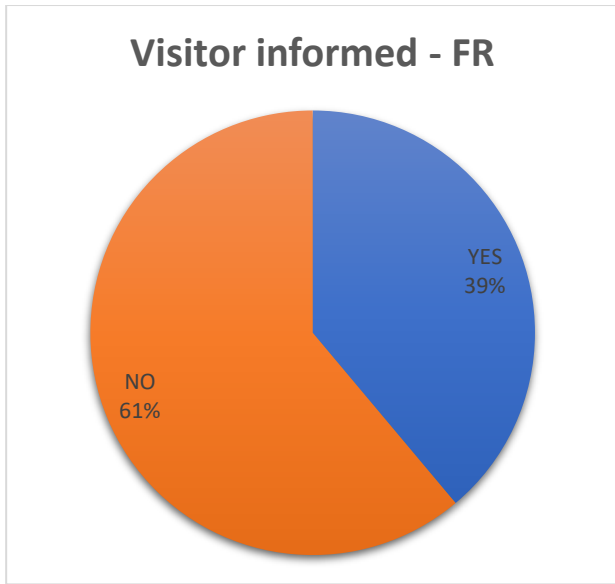
When asked about the importance of sustainable practices (Sustainpractise) in their vineyards and wine cellars, both regions agreed on the relative significance of this aspect.

However, Mainz wineries reported a lower emphasis on providing visitors with information (Explaining) about these sustainable practices during the wine tourism experience. Instead, they viewed the development of wine tourism as a contributor to the overall sustainable development of their businesses (DevlopmentSusWT), while this relationship was less prominent for Bordeaux wineries.

This finding aligns with the data in the following table, which shows that most Mainz producers believe their visitors are well-informed about sustainable practices, whereas only 39% of Bordeaux producers shared the same perception.

GWC region and no. of resp.		Visitor informed (in%)	Sustainability influence on Visitor's Choice (in %)	Conflict between Wine tourism and sustainability (in %)
BORDEAUX 108	YES	39	44	3
	NO	61	57	97
MAINZ 58	YES	72	55	7
	NO	28	48	95

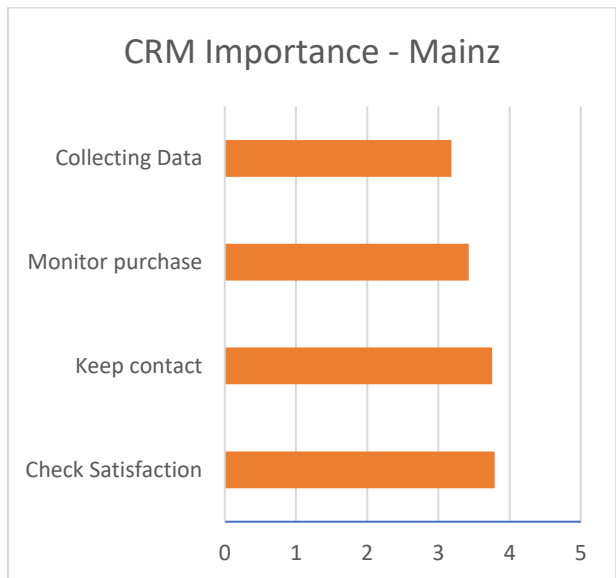
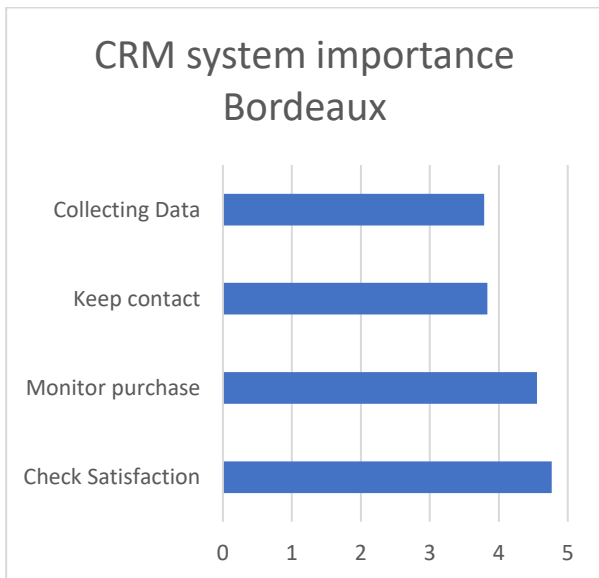




Both regions agree on the significance of sustainable practices in influencing visitors' choices of wineries to visit, and they report minimal conflict between wine tourism and sustainability.

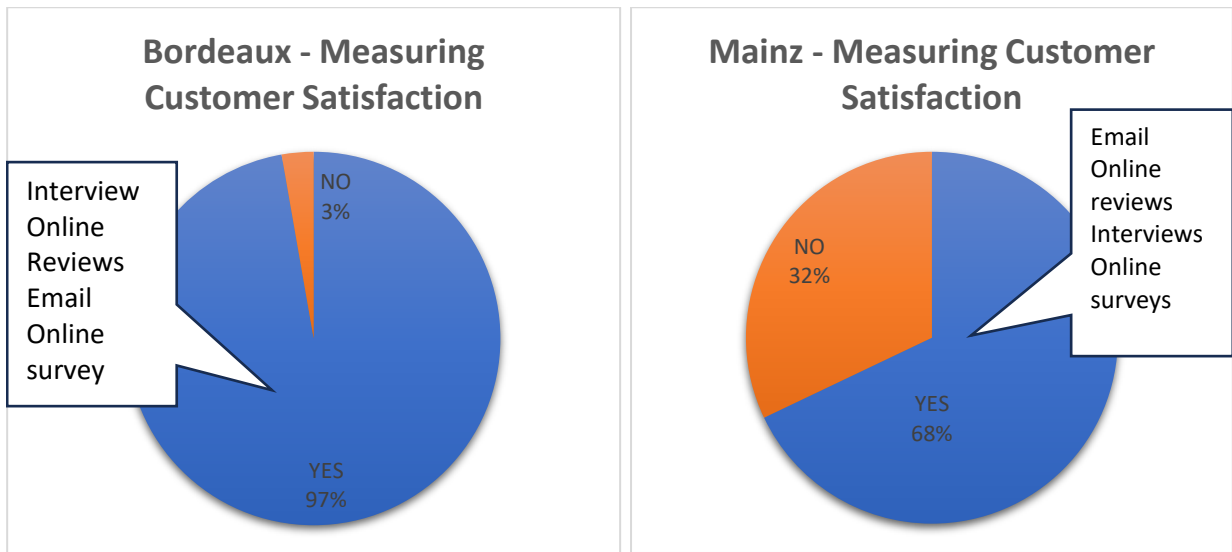
5.3.9. CRM : managing relationship and visitor's satisfaction

When asked about the importance of CRM systems, both regions prioritized 'checking satisfaction' above other functions such as monitoring purchases, maintaining contact, or collecting personal data.



Despite prioritizing customer satisfaction, the implementation of satisfaction measurement tools is often limited. For example, many wineries rely primarily on post-experience interviews with visitors, which may not be the most effective method for gathering feedback.

While there are variations in how wineries collect this type of information, online surveys are generally the least used approach in both regions.



Regarding communication channels, both regions favor their own websites, followed by social media platforms.

Favorite Communication Channels	Bordeaux	Mainz	Favorite Communication Channels
Website	99	49	Website
Social Network	79	37	Social Network
Specialized website	79	30	Newsletter
Travel Agency	54	14	Google ref
Newsletter	41	10	Print
Google ref	12	9	Specialized website
Print	10	0	Travel Agency



Overall, Facebook and Instagram are the most popular social media platform by a significant margin. No mention of the blooming TikTok network.

Favorite Social Network:

Facebook	50
Instagram	54
LinkedIN	4
Press	1
Youtube	3
RuedesVignerons (French booking platform)	2
Tripadvisor	2

We could question the efficiency of each of these communication channel when looking at the customers favorite mean to plan a visit or leave a review.

5.3.10. Innovation

No. Occurrences	Bordeaux	Mainz	No. Occurrences
52	Events	Events	19
15	Restaurant / Chef	Digitalization of booking	18
8	Digitalization of book	Restaurant / Chef	15
7	Accommodation	Digitalization of CRM	11
4	Digitalization CRM	VR	10
3	VR	Accommodation	8

When asked about their areas of innovation, producers in both regions mentioned increasing the frequency and variety of their events. However, digitalization of the booking process and CRM systems were prioritized more highly in the Mainz area. This might indicate a greater preference for technology in Germany. Cultural differences could also play a role in these variations. Surprisingly, we have also observed a reluctance to implement innovation or technology in some cases, indicating resistance to change among certain individuals in the comment section.

Comments on innovations	Occurrence
Transport	9
No digitalization/ no innovation	3
Outdoor cinema	2
Accessibility	1
Bike	1
Infrastructure, restaurant	1
Online tasting	1
Open air activities (events)	1
Picnic	1
Tasting workshop	1
WoM	1



6. Study 3: Motivations and Satisfaction, the visitor's perspective

6.1. Design of the survey

To complement our previous research, we conducted a survey among visitors to assess their perceptions of the various dimensions of wine tourism values and winery priorities.

32

6.2. Data collection

In Bordeaux, data collection was conducted by AMS Conseil students, who surveyed visitors at 28 wineries during the summer season. In Rheinhessen, data collection was carried out by students of Professor Szolnoki, who surveyed visitors at 12 different wine estates. In total, the study gathered 422 responses: 200 from Bordeaux visitors and 222 from Mainz visitors.

6.3. Results

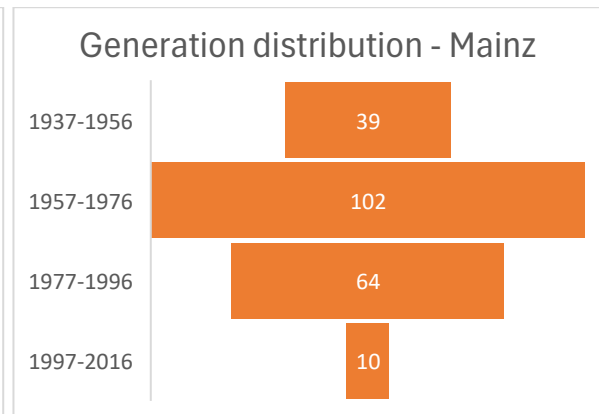
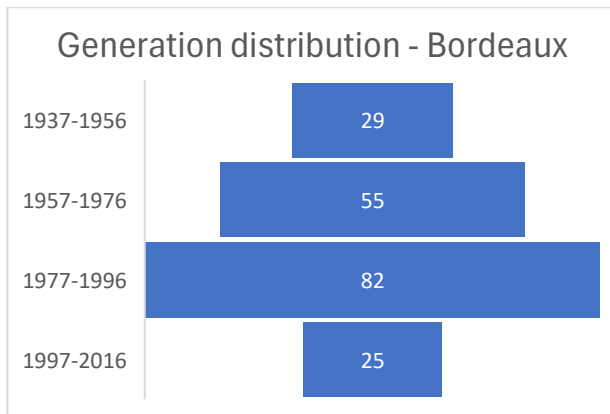
6.3.1. Demographics of visitors

The sample of respondents is balanced in term of gender representation in both regions.

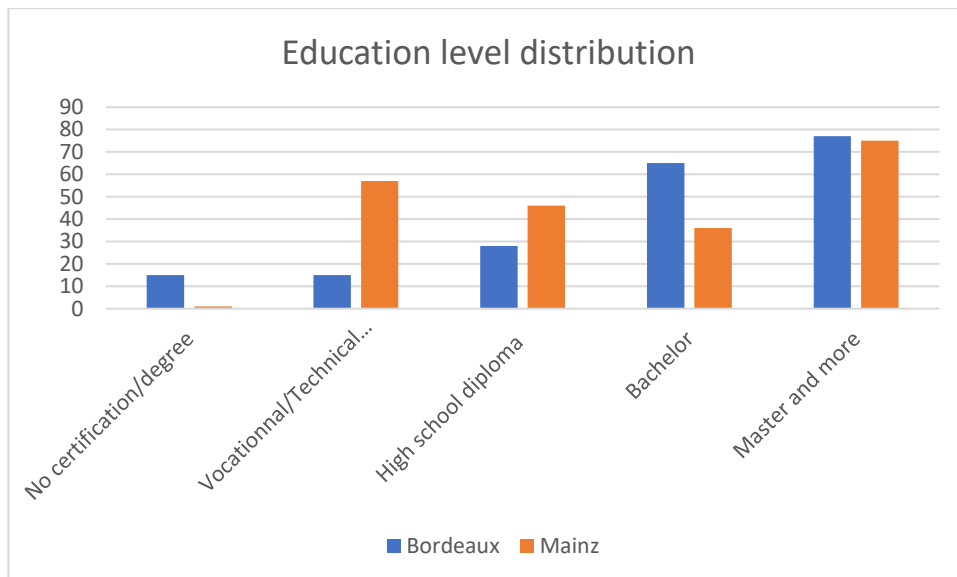
GENDER	Bordeaux	%	Rheinhessen	%
Male	98	49	101	47
Female	80	40	109	50
Diverse	21	11	1	0
Not disclosed	1	1	6	3
Total	200		217	

The generation distribution is slightly different, with older visitors represented in Mainz region.



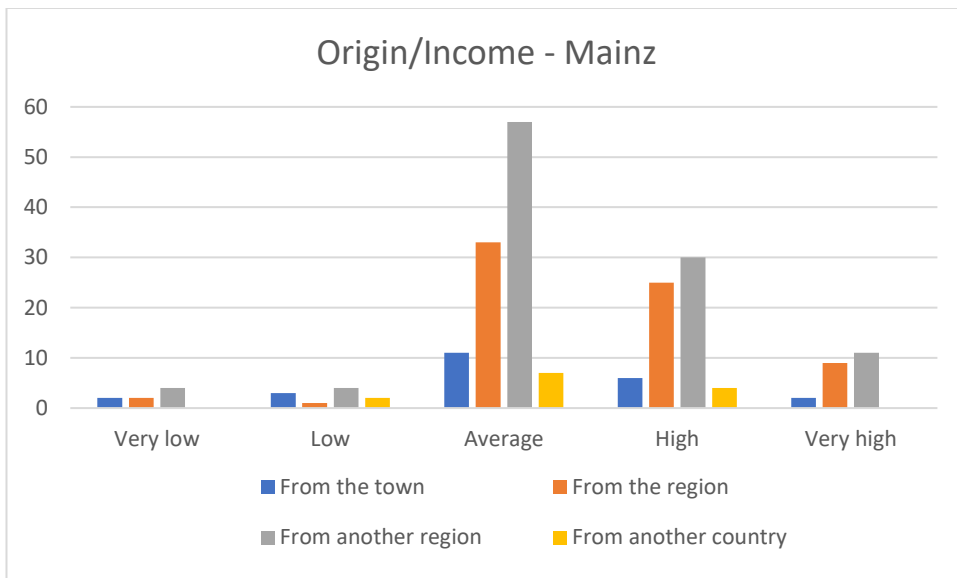
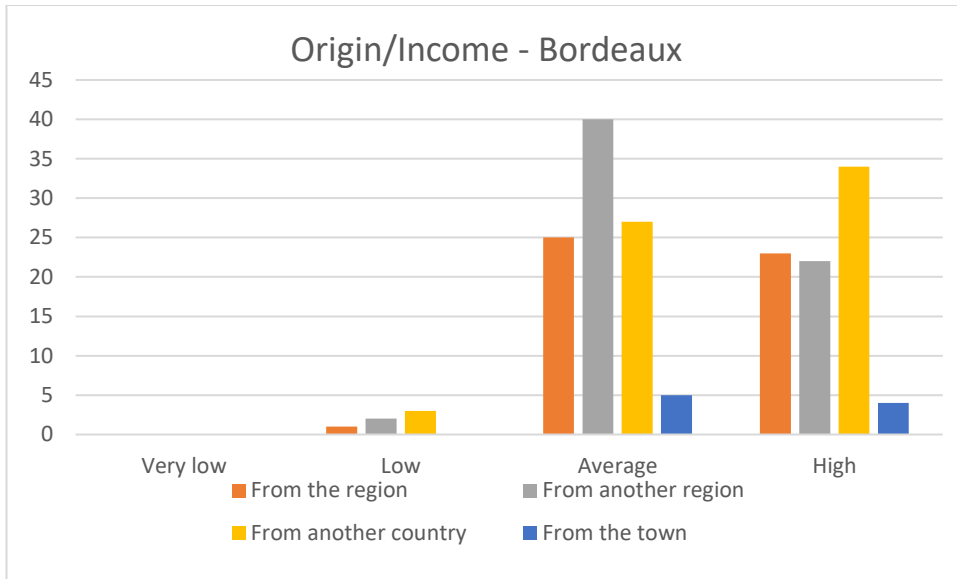


As mentioned in [Motivations to practice wine tourism](#) in the producer study, Bordeaux attracts a lot of international visitors and few locals, when Mainz visitors are mainly from the region or the rest of country. There international visitors are underrepresented.



The education level distribution could be affected by international visitors, having higher education and better income to be able to travel, but also cultural effect of degree at each national level. This can also affect the crossing between origin and income, as shown in the graphs next page.





6.3.2. Wine tourism and consumption habits of the visitors

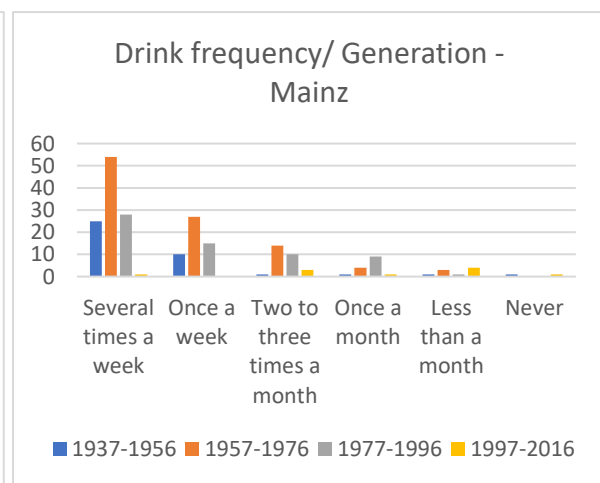
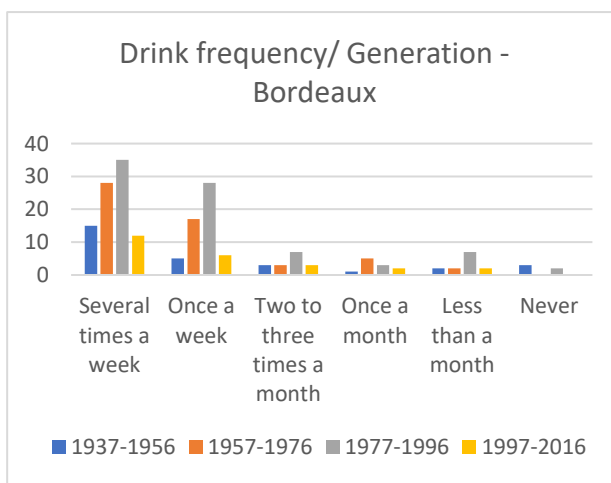
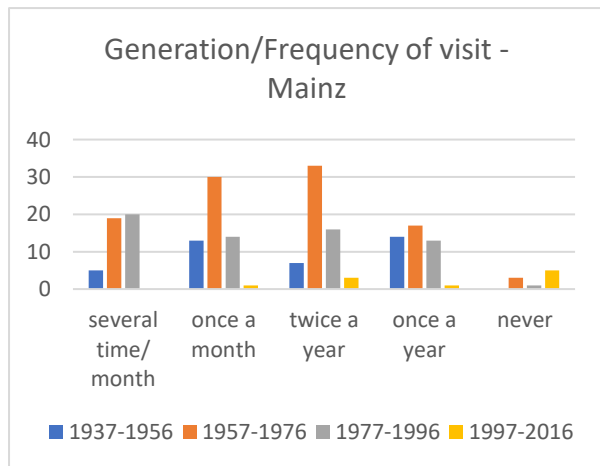
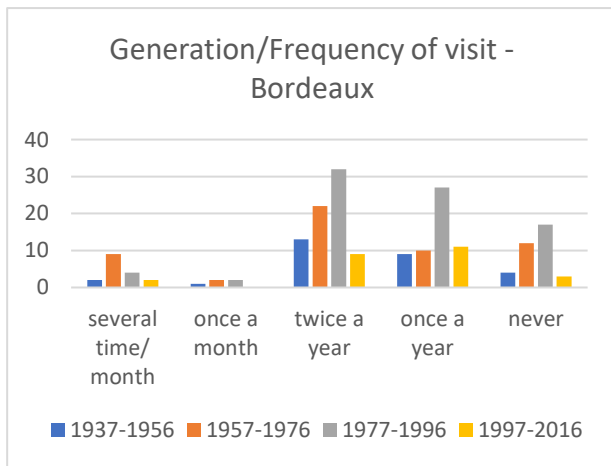
The visitors in Germany being local, their stay last mainly between one and two days, while length of stay is more spread in Bordeaux region.

No DAYS of STAY	Bordeaux	Rheinhessen
1	79	147
2-6	75	71
7-11	33	3
12-16	8	1
17-21	3	
27-31	2	
Total	200	222

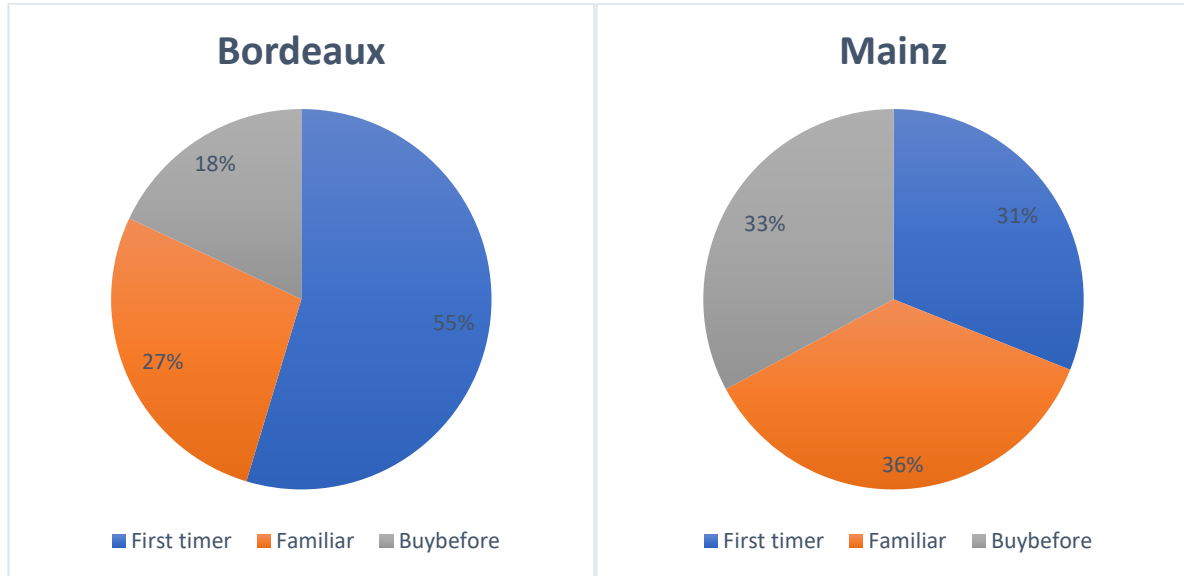


COMPANY	Bordeaux	Mainz	COMPANY
couple	70	90	friends
friends	66	81	couple
Family with children	45	19	alone
alone	9	16	Family with children
business	9	6	business
Total	199	212	Total

If in both regions, wine tourism is seen as a social experience, enjoyed by couples and friends. Bordeaux visitors seem to bring their family with children more than in Mainz region. This should encourage producers of Bordeaux to include child-friendly activities to retain this category. When examining the relationship between generations, vineyard visit habits, and regional drinking patterns, we found that Mainz visitors are more frequent attendees of wine tourism experiences, while Bordeaux visitors are less regular. In both regions, older visitors and more regular wine drinkers tend to participate in wine tourism activities.



Regarding their visits to the wineries where they were interviewed, Bordeaux visitors were more likely to be first-time visitors (55%), compared to Mainz, where regular visitors and consumers made up over 69% of the visitor base.



6.3.3. Planning of the visit

Interestingly, a majority of visits were planned, primarily based on personal recommendations, highlighting the significant influence of word-of-mouth.

Did you plan your visit?	YES	NO	Total
Bordeaux	134	66	200
Rheinhessen	158	64	222

How did you plan your visit?	Bordeaux	Mainz	How did you plan your visit?
personal recommendations	57	79	personal recommendations
Google search	36	36	previous purchase
Other	24	30	Other
previous purchase	21	11	Google search
Social media	16	10	Social media
Website	16	5	Website
Print	1	4	Newsletter
Newsletter	0	4	Print



This may also indicate that travel planning is more involved, especially in remote areas, making spontaneous visits less common. Printed materials and newsletters are the least preferred methods for visitors to plan their trips to wineries.

When spontaneous, the visit has been usually recommended by local actors:

If not planned, how did you hear about the wine estate	Bordeaux	Mainz	If not planned, how did you hear about the wine estate
WoM	39	21	WoM
Other	20	12	Other
Signage on the road	7	3	Signage on the road

It is confirmed in the comment section of the question:

Comments:	Occurrences
Recommendation Airbnb/hotel/guide/restaurant	10
Website/Internet/Online recommendations	5
Recommendation from friends	3
Tour (cruise, wine tour, tour operator)	3
with Family	2
with Friend	2
Online recommendation (Rue des vigneron/Olala Bordeaux)	2
Program of visits/organized trip	2
Bought wine	1
Invitation	1
Tourism office	1
Tripadvisor	1

6.3.4. Motivations and activities practiced

When asked to rate their motivations for visiting a vineyard on a scale of 1 to 5, we obtained the following rankings based on the average scores:

Motivations	Bordeaux	Mainz	Motivations
Wine	4.05	4.37	Wellbeing
Nature	4.01	4.35	Nature
Gastronomy	3.96	4.26	Gastronomy
Architecture	3.79	4.23	Wine
Culture	3.61	4.16	Fun Social
Friends			Friends
Family	3.60	3.25	Family
Wellbeing	3.49	3.24	Sport
Fun Social	3.19	3.18	Culture
Sport	2.51	3.08	Architecture
Business	1.54	1.77	Business



We note that 'Well-being' is the main motivation to visit a vineyard in Mainz region, while is very little proposed in wine estate of this area.

The activities enjoyed by visitors also vary between the two regions. There is a notable alignment between winery priorities and visitor preferences in Mainz, with 'Purchase of Wine' being the most frequently cited activity. In Germany, tours of the vineyard and facilities are not as highly sought after as in Bordeaux. The relatively strong ranking of 'Wineshop' underscores the importance of having such a space on-site.

Activities	Bordeaux	Mainz	Activities
Wine tasting	181	134	Purchase
Tour	144	130	Wine tasting
Purchase	98	72	Gastronomy
Gastronomy	70	63	Wineshop
Wineshop	58	35	Tour
Sport	16	14	Night
Art	9	14	Art
Night	8	9	Other
Other	1	2	Sport

6.3.5. Satisfaction factors

SATISFACTION Factors	Bordeaux	Mainz	SATISFACTION Factors
Staff	4.43	4.61	Staff
Facilities	4.36	4.53	Ambiance
Ambiance	4.35	4.47	Wine quality
Wine quality	4.33	4.38	Facilities
Information received	4.26	4.25	Access
Sustainable Practice	4.08	4.25	Price
Access	4.03	4.17	Information received
Activity range	3.98	4.07	Customization
Customization	3.98	4.01	Sustainable Practice
Price	3.81	3.98	Activity range

As demonstrated in previous research, the quality of staff is considered the most satisfying factor for visitors, reinforcing the importance of personal interaction, genuine engagement, and authenticity for the visitor experience. This highlights the crucial role of effective training and recruitment for those involved in wine tourism.



The last position of price in Bordeaux region raises some question about the value perception of the experience. When comparing overall satisfaction and price satisfaction to level of income, interestingly we find that the highest is the income the highest is the satisfaction and the price.

Income/Satisfaction	Overall satisfaction	Price satisfaction
Low	4.17	4.17
Average	4.26	3.75
High	4.35	3.73
Very High	4.43	4.50

6.3.6. Sustainability perception

To evaluate their perception of the winery’s sustainability we asked visitors if the guide communicated on sustainable practices implemented in the wine estate, if they learnt something new and if it comforted their opinion of the overall sustainability of the wine estate.

Sustainability perception	Communication On Sustainable practice	Learn	Comfort your opinion
BORDEAUX			
YES	166	144	150
NO	34	56	50
MAINZ			
YES	103	69	112
NO	114	148	103

Mainz visitors, primarily German, were the most knowledgeable, indicating that they learned little new during their visits. This finding aligns with the producers' perception of their visitors.

6.3.7. Loyalty and CRM

Building loyalty is a key motivation for producers to engage in wine tourism. While visitors in both regions are enthusiastic about sharing positive experiences with their relatives, sharing personal data and becoming loyal customers are less likely (on a scale of 1 to 5, 1 very unlikely, 5 very likely).



Loyalty	Bordeaux	Mainz	Loyalty
Positive recommendation	4.41	4.48	Encourage to Buy
Recommend	4.29	4.45	Positive recommendation
Encourage Buy	4.25	4.33	Recommend
Buy wine	3.61	4.13	Repeat
Review on Social media	3.52	3.68	Buy wine
Repeat	3.01	3.60	Loyal
Personal data	2.91	2.77	Personal data
Loyal	2.81	2.05	Review on Social media

7. Conclusions

7.1. Producers' priorities VS Customers' satisfaction (IPA Matrix)

The **Importance Performance Matrix** categorizes potential improvements by comparing service/product providers' priorities with their customers' satisfaction factors.

Here is a summary of our three studies' conclusions:

- **Basic:** These are the fundamental elements a provider must offer to fulfill its mission or "reason to be." For WT, wine quality is paramount since wine tasting is central to most visits. Tours are also crucial, as visitors often want to see where the wine they enjoy is made.
- **Potential Overkill:** This quadrant represents potential overinvestment in this area, managers might allocate excessive effort for minimal customer satisfaction gains. For example, complimentary tastings and tours could be overdone, fair pricing is an efficient way to manage revenue without damaging satisfaction. Communication channels could be optimized to align better with customer preferences, and booking processes could be streamlined.
- **Keep up the good work:** where to maintain excellence, producers' efforts and customer satisfaction factors perfectly align. Examples include well-highlighted sustainable practices, the quality of staff, and their expertise.
- **Prioritize Focus:** Investment and attention are needed in this area to avoid neglecting important factors that contribute to customer satisfaction. Here we can mention digitalization of the service to offer better WT experience, but also relieve workforce of unnecessary tasks. Developing events, especially



wellbeing and open-air events will fulfill the expectation of immersion in Nature for the visitors.

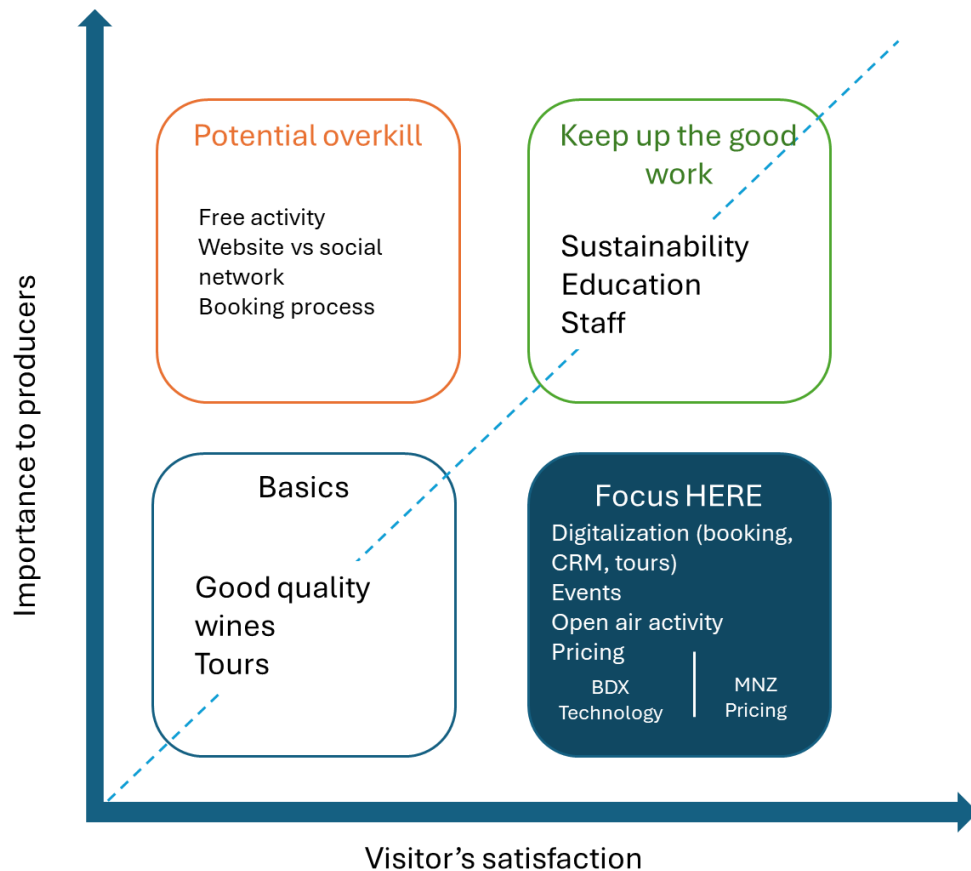


Figure 6 Importance-to-Producers/ Visitor's-satisfaction (IPA) matrix

7.2. Managerial recommendations to increase value creation of wine tourism

To address our [initial research questions](#), we can conclude the following:

- The value creation of WT is multidimensional and cannot be solely measured by economic factors. We identified seven dimensions in which WT contributes to the overall value creation of wineries:
 - Financial: Perceived costs and financial benefits of wine tourism
 - Extra-Financial Benefits: intangible advantages of wine tourism
 - HR Organization: Human resource management aspects
 - Challenges: Obstacles limiting in wine tourism growth
 - Sustainability: Importance of sustainability



- Customer Relationship Management
 - Innovation
- Regional wineries' perspectives align with those of award-winning wineries from Great Wine Capitals. However, these Best Of Wine Tourism winners are market leaders with a broader strategic vision for achieving their goals. For instance, survey results on innovation were more modest compared to interview responses.
- Visitor expectations and habits regarding WT consumption need to be better understood to ensure that resource investments (time, money, energy) are optimized. Unfortunately, refining the profitability threshold of WT requires more data, which is difficult to access and analyze. At this stage we could not demonstrate a strong influence of WT on loyalty to the winery.

We can also add the following recommendations:

- **Digitalizing the WT service landscape** does not compromise authenticity but can streamline booking processes and CRM monitoring.
- **Key areas for stakeholder involvement** include regional transport and infrastructure, to ease the visitor traffic and decrease the limiting impact it can have.
- **Financing wine tourism development** is essential, for this profitability thresholds and models must be developed to get financial support.
- **Loyalty programs** need to be re-evaluated. Loyalty is not reported by visitors, unless their priority is to buy wines as it is more the case in Mainz, WT experience does not spark loyalty. It is more efficient to improve image and notoriety.
- **Communication** should prioritize social media, SEA (Search Engine Advertising), and SEO (Search Engine Optimization), with the website as a secondary communication channel.
- **Online surveys** can gather visitor feedback to adjust offer.
- **Adapting to cultural differences** is crucial. As shown, different populations of visitors will have different expectations and habits of consumption. Speech and discussion should be adapted to their cultural background.



- **Human resources:** as staff is considered a highly regarded component of the visitor's satisfaction, they must be properly trained and recruited with care. Therefore, they might be one of the biggest investments to plan for.

Note: These conclusions could be applied to other regions within the Great Wine Capital network. It would be valuable to replicate this audit experiment in those areas to identify any additional dimensions. The authors recommend using the same dimension template and IPA matrix in future audits.



8. Budget

Please find below the detail of expenses accomplished by September 2024.

TOTAL: 7 500 EUR received	Description	Amount
Victoria HOCHMAYER's visit in the vineyards. 15 th , 16 th and 17 th of February 2024	Driving	597,52 EUR
	Accommodation	244,00 EUR
	Food	22,19 EUR
Technology	MaxQDA qualitative analysis software	1 296,00 EUR
	5 individual licences	
	1 Teamcloud access	
	Happyscribe 10h (transcript)	120,00 EUR
Quantitative survey producer data collection	AMS Conseil KEDGE Business School Junior Entreprise	1170,00 EUR
Claire Lamoureux's travel to AWBR 2024	Flight Bordeaux-Verona	382,50 EUR
Gergely SZOLNOKI's AWBR participation	Registration fees and travel expenses	1504,92 EUR
Quantitative survey visitor data collection	AMS Conseil KEDGE Business School Junior Entreprise	1700,00 EUR
	Valentine Marck's travel expenses	144,00 EUR
	Lenae Marchesseau's travel expense	22,66 EUR
	Vouchers	300 EUR
TOTAL SPENT		7503,79 EUR



9. Acknowledgements

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We must recognize the significant dedication and work ethic exhibited by our three students, Lenae Marchesseau, Valentine Marck, and Victoria Hochmayer, whose efforts were essential in facilitating this study.

Artificial intelligence was used to proofread and enhance the quality of English in this report.

Raw data is available on demand by email claire.lamoureux@kedgebs.com

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