Wine Tourism in South Tyrol

Bachelor Thesis for Obtaining the Degree

Bachelor of Business Administration in

Tourism and Hospitality Management

Submitted to Lalicic Lidija

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Vienna, 10th June 2016
Affidavit

I hereby affirm that this Bachelor’s Thesis represents my own written work and that I have used no sources and aids other than those indicated. All passages quoted from publications or paraphrased from these sources are properly cited and attributed.

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Abstract

This Bachelor thesis illustrates how South Tyrol’s wine tourism should develop in the future and which improvements should be done in order to become a better known wine destination that can compete with popular wine destinations. The overall findings of the topic that emerge of the literature are rather low. That is why four interviewees who were familiar with this topic have been asked about their opinions about South Tyrol’s wine tourism and what should be enhanced. With those outcomes a SWOT analysis has been formed to find out what is already good, where it can improve, what is not working well and on which things it is hard to have control on. The outcome of the SWOT analysis shows that South Tyrol has already many advantages and it is already on the right track, nevertheless there are some parts where South Tyrol can advance to become a more precious wine destination.

Keywords: wine tourism, culinary tourism, tourism, wine region, wine area, South Tyrol, destination development
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List of Abbreviations

SWOT  Strengths, Weaknesses, Opportunities, Threats
RME  Regional Management Entity
1. Introduction

Wine tourism is a niche market (Getz, 2000), which means that “the market which has been identified has some special characteristic and that is worth marketing to” (Staff, n.d.). South Tyrol is the oldest wine region of the German speaking area (Vinumhotels, n.d.), which therefore has a huge potential in getting more famous. It is one of the smallest wine regions in comparison to other Italian wine areas, but it is an area that produces high quality wines that can easily compete with the international market (Suedtirolwein, n.d.). Years ago, South Tyrol’s economy was predominantly oriented on agriculture, which is still important today in cultivating wine and apples. However, South Tyrol became well known in the tourism branch as an often revisited tourist destination during the last decades. (Regione.taa, n.d.) The combination of both, wine and tourism results in wine tourism.

Sometimes wine plays a special role in making a certain area to a wine region and building up tourism in this regard where it has not existed yet. However, South Tyrol is already a highly visited tourism destination and is famous for its beautiful landscape, its culture and over all for its products. Nevertheless, wine tourism in South Tyrol could open up to attract a new type of wealthy guest that comes and visits the region and who has higher expenses than a normal South Tyrolean tourist. Often tourists have other motivations than wine when they decide to go on their holidays to South Tyrol though. This means that tourists rather come for hiking, relaxing or other activities. So, it is questionable if South Tyrol has a big potential as a wine region (Waldboth, 2016).

Wine as a stand-alone factor, is often not that successful and needs some other elements as a support in order to make it more precious (Jaffe and Pasternak, 2004). Food and wine always go hand in hand. The International Culinary Tourism Association explains culinary tourism as “the pursuit of unique and memorable eating and drinking experiences” (Manolis, 2010). It is
mostly looked as a local action where tourists consume mostly products of that specific area. This in turn, helps the region to become more sustainable in a way (ibid.). A great tourism experience is the most valuable return a provider can feature to the guests. However, this experience is not that easy to achieve, because it is more than just offering food at a winery or promoting some wines. It is the reflection of the culture, the taste of local products and the authenticity of the region (Winemaker’s federation of Australia, 2012). Especially, South Tyrol has so much to offer and benefits from its authenticity of easy dishes, which are already hundreds of years old and still cooked today, like “Knödel”, “Schlutzer” or “Gerstensuppe”, and its regional products, like wine, cheese, bacon and apples. The restaurants, where they offer those typical dishes reflect exactly the feelings of cosiness and warmth and an authentic way of life that contributes a big part to a customer’s experience, which results in the end in good reputations as well as word of mouth and coming back to that destination (Jeanny, 2013).

In this thesis South Tyrol’s wine tourism has been observed in detail and four interviewees gave their opinions about how South Tyrol performs in its wine tourism today and what could be improved in the future. Some changes in the region South Tyrol took already place, but it can still make some enhancement, to perform better within the region’s wine tourism. This is why the aim of this thesis is to find out where South Tyrol can improve further in order to amplify its position in the wine market. Therefore, the research question is stated as the following: How can South Tyrol enhance its wine tourism for a better future performance and positioning in the wine industry?

As to see how the region can improve in this sector, it is important to first inspect its current positioning in the market and to define and explain some of the main aspects that are key in the field of wine tourism.
2. Literature Review

The following section includes the literature found regarding the topic wine tourism in general, as well as wine tourism in relation with the Italian region South Tyrol. But at first, a map of South Tyrol with its important history is provided, plus a short introduction to South Tyrol itself is stated to better understand the case of the destination.

2.1. South Tyrol in general

2.1.1. South Tyrol’s geographical location

South Tyrol is an Italian region, which is located in the North of Italy, which borders on Austria and Switzerland. It represents an important role because it is the transit between Middle Europe and Italy (Regione.taa, n.d.).

On the next page a map of South Tyrol has been provided. South Tyrol is located in the Alps which cross through the whole region. The white lines represent the main roads, which traverse the main valleys and link together the whole region. In the centre the main city Bozen is located. In the North, above the city of Sterzing, there is the Brenner which is the border to Austria. South Tyrol also borders on Austria in the East, where the Pustertal is situated, whereas in the South-West the region borders on Switzerland and in the South on the rest of Italy.
On the next map South Tyrol’s wine areas are shown in detail.
South Tyrol’s main wine area is located in the South (Überetsch and Unterland), where for instance Kaltern is situated, and goes up until Meran. However, Meran cultivates huge amounts of apple trees too. Bozen, as a wine area is also very strong. The Vinschgau and Eisacktal areas are located higher than the others and therefore it is colder in those regions. Nevertheless, those areas still have the possibility and capability to produce great wines (Vinumhotels, n.d.).

### 2.1.2. South Tyrol’s history

South Tyrol is one of the cases with a long history that influenced the inhabitants’ lives until today and had a strong effect on its languages. In the year 1363 the Habsburgs who ruled over the Austrian empire, took Tyrol and kept it for over 500 years. Around 1910 most of the people in South Tyrol spoke German and just 4% were Italian speakers. In 1919, everything changed because after the 1\textsuperscript{st} World War, Tyrol was split into North Tyrol, East Tyrol and South Tyrol, whereby the first two were kept by Austria and South Tyrol came to Italy as loot. This was a crucial turning point of South Tyrol’s history. From the year 1922 until 1945 under the power of Mussolini, Italy has been radically Italianized and German was prohibited to be spoken. This meant that for instance all German family names were changed to Italian, as well as it was done for city names. South Tyroleans who did not want to stay in Italy had the option to move to the German empire. After the 2\textsuperscript{nd} World War, South Tyrol tried to become an autonomy and in the 1972 it came into force, so both German and Italian became the main languages of the region (suedtirol.info, 2015).

### 2.2. Wine Tourism

After having provided a short introduction to South Tyrol’s location and history, it is now time to pass over to the main topic of this thesis, which is South Tyrol’s wine tourism.
There are several definitions of wine tourism. Hall (1996) defined wine tourism 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, 1996). Another definition states that wine tourism is related to travel and can be “a form of niche marketing and destination development” (Getz, 2000). A wine tourist, on the other hand, has more specific characteristics which are introduced in below.

### 2.2.1. What is a wine tourist?

Tourists who participate in wine tourism are heterogeneous and need to be specified. Wine tourists often differentiate themselves based upon their motivations for example. In order to understand wine tourism, one has to have a closer look to the various wine tourists. According to Corigliano (1996), a wine tourist besides being a “professional”, having a high income and knows everything about wines, also is the one person who can hold technical conversations about the beverage with like-minded people and is approximately in the range of 30 and 35 years old.

Other authors believe a typical wine drinker can be assigned to one of the following types: “passionate newcomer”, “follower” or “drinker”. The “passionate newcomer” likes to travel and is ready to experience something new. The wine plays a rather socializing form in his or her perception, which is to build up relationships with others. This kind of wine tourist is between 25 and 30 years old. The “follower” is defined as a tourist who likes wines and knows the basics about the liquid. He or she is between 40 and 50 years old. The last one in this categorization is the “drinker”, which is defined as a tourist from the older generation (older than 50 years), who takes the opportunity of a weekend’s winery visit for drinking and going out and who likes to drink a little bit more (Corigliano, 1996).
Another distinction of wine tourists is explained by Hall (1996), who defined three categories: the “wine lovers”, the “wine-interested” and the “wine-curious”. “Wine-lovers” have a high knowledge and interest of wines and everything what surrounds it. Wineries and its wines are the prime factor why those tourists plan their visit to a certain destination and where they surely purchase some wine (Hall, 1996). The “wine-interested” on the other hand would like to know more about wines and enjoys it. However, it might not be the first and only reason why he or she goes to that specific wine area. This tourist knows some basics about wines and would probably buy some wine during his or her trip (Hall, 1996). Lastly, the “wine-curious” tourist is not as interested in wines as those two mentioned before, because visiting a winery is more an activity for him or her to spend the free time and make some social relations (Hall, 1996). Thus, considering these two definitions of a wine tourist, one can say that a wine tourist is mostly interested in wines, is usually a little bit older, has a rather high income, is well educated and likes to drink wine with his or her friends, family or a group of wine-interests.

2.2.2. Motivations of a wine tourist

After having considered what a wine tourist is, it is also of importance to know the motivations why this kind of tourist visits a wine area. Hall (2000) as well as Bruwer (2002) found the main motivation factors of a wine tourist for visiting a wine area. According to the two authors, the most important reason that motivates someone to visit a wine region is the want to taste and buy wine. Other motivations which are ranked a little bit lower are, for instance, establishing relationships with other people who are interested in wines too, getting in contact with others, learning some basics about wine and enjoying the atmosphere at the winery (Hall, 2000; Bruwer, 2002). In conformity with some of the previous aspects, Thompson and Prideaux (2009) argued that food and wine are one of the most important or the most important motivator for tourists in wine tourism. A wine region also contributes to the motivations to go on a wine trip. This includes, for instance, the geographic
location of a wine region, the brand image of that area, the profiles of the wineries and their wine products, the landscape that surrounds the wineries and some other attractions, like a wine road, a wine festival or another wine event. This again is supported by how easy an area is reachable, its infrastructures and its climate (Alant, 2004; Bruwer, 2004). To sum it up, all of those motivations are relevant for a wine tourist’s visit and need to be deeply cultivated and always further developed in a wine region.

2.2.3. Customer’s perception of a wine region

But what contributes to a wine region from a customer’s perspective? A wine region includes three core features, which combined generate the attractiveness of a wine region. Those features are the core wine products, the cultural products and the core destination appeal. The first one includes the main focus of wine tourism which is the visitation of established and friendly wineries, the good knowledge of the winery staff, wine festivals or events and well-known wineries in general. Those factors are related to how many wineries are located in the region, if the wines have a good image, in relation to good wines and if the wineries offer some tours through the vineyards. Cultural products refer to the offer of unique accommodation with regional flair, good restaurants and traditional wine villages. It is also of importance that regional products can be bought nearby, especially some self-made farm products. The core destination appeal for wine tourists includes an attractive landscape, nice climate, beautiful wine trails and in general that a lot of attractions are offered, preferable outdoors. If those features are provided in a wine area, it is a good starting point for a wine tourist to have a good holiday experience (Getz and Brown, 2006).

2.3. Culinary Tourism

“Culinary tourism is defined as the pursuit of unique and memorable eating and drinking experiences. By combining travel with these edible
experiences, culinary tourism offers both locals and tourists alike an authentic taste of place” (Ontarioculinary, n.d.).

2.3.1. Partnerships with stakeholders

It is necessary to state that wine tourism does not only have to do with wine, but it has so much more to offer and promotes the entire tourist region of the wine destination. One winery alone, as a separated single factor, has not a huge bandwidth in attracting a large number of tourists. That is why a formation of partnerships or alliances with travel businesses, farmers, restaurants, hotels and other wineries or wine organizations could help a region to support each other simultaneously, like synergies, to boost one another. Those partnerships can also work with each other during the developmental phases and organization of the establishment of the partnership in order to share a platform in the industry under the same entity. Then they can as well arrange co-organized events such as wine festivals, wine tours and wine fairs with promotions and provision of some local products, for instance apples, cheese, homemade Knödel and Apple Strudel and other local typical dishes, in order to grow as a wine area and that everyone benefits from it (Jaffe and Pasternak, 2004).

In addition, co-operations with hotels can also be an advantage, because on the one hand, they can provide regional high quality wines on their wine carts and on the other hand, they can give their guests information about wineries, wine tastings, the wine road, and evening programs, such as a wine event in their surroundings. Restaurants in the neighbourhood of wineries can also gain on popularity and could be a reason why tourists after drinking a special wine, that they liked very much, visit a winery (ibid.). A close collaboration signifies a win-win situation for all sides and therefore is essential so that everyone takes something out of it.
2.3.2. Co-branding

Nowadays, tourists want to experience the whole region where they spend their holidays at the moment. An element which is a more increasing factor in this trend is the culinary part. So, tourists are aware of the importance of knowing where they are and what products the region offers (Boniface, 2003). A way to promote food and wine simultaneously and become more popular in the market is for instance to co-brand those products. Co-branding “is a marketing partnership between at least two different brands of goods or services... to increase their sales and cash flow”. (Investopedia.com, 2010)

This will succeed with complementary products, like wine and cheese for instance. So, the cheese producer will benefit from the co-operation of wineries and other organizations that work together (Jaffe and Pasternak, 2004). In South Tyrol all the regional products could have been thought to be complementary. The “Marende” was years ago a so-called small meal in between lunch and dinner, which was eaten after having completed the hard work at the farm. Nowadays, it is still part of the South Tyrolean culture and can be acquired at mostly every restaurant. The Marende includes next to a glass of wine, cheese, bacon, gherkins and bread, like the local “Schüttelbrot”, which is shackled, hard bread (Horvat.it, 2016). Moreover, South Tyrol already owns a family brand, named after its region, which is used by products and tourism companies that show specific criteria. Agricultural products, however, like apples, bacon and wines have even a European protection because of its higher quality (SMG, 2016). A brand like this can improve the image of a region, which it already does in South Tyrol and shows the stable quality of those products (Interview, Mrs Filippi and Mrs Stürz).

Wine Tourism is not a stand-alone activity, because food does always go together with wine and that is why both of them need to support each other and need to be supported by its surroundings too. Nevertheless, it has a huge potential to become bigger as a lonely business and could gain more on
popularity. The co-operation with others stakeholders in the area makes this possible, subsequently with positive effects on a destination development. Overall, this will make the whole region more attractive and contributes at the same time to the enhancement of the region and its brand image. The next section will explain more in depth the literature related to destination development.

2.4. Destination Development

2.4.1. What is destination development?

Firstly, “a tourist destination is basically a travel destination that attracts large numbers of travelers, or tourists”. (WiseGeek, n.d.) The destination is supported by some factors, like “attractions, amenities, access, human resources, image and character and price”. (World Tourism Organization, 2007) Wine tourism in a destination has become very precious in the past years. First, a wine destination attracts a lot of tourists to a certain area with the products that it offers and with other outstanding factors, like its landscape or its climate. Second, wine is strongly related with quality which is directly transferred to the region itself. Third, the wine tourism can generate and enhance attractiveness in a rural area, can develop it and offers new jobs (Szivas, 1999). However, to become a wine area, it is not enough to offer just wines, but a certain wine destination development has to appear. This is a process where the area already has or needs to build up some attractions, the infrastructures for being a wine destination for tourists are provided, the staff in the hospitality field is well trained and has a wide knowledge about wine and there is a proper marketing plan of that certain area. In order to develop these products and the image of the wine area, the help of several organizations is needed, which are not only the wineries, but also DMO’s and some other organizations that are related to a region’s wine tourism (Getz, 2000). In general, a “destination development is a continuous process of coordination and development of amenities, facilities, products and services
that support host communities to deliver quality experiences for visitors and enhance residents’ well-being” (Sustainable Tourism Online, n.d.).

Wine tourism is a package and one element of it is the “wine landscape”, which is, on the one hand, the nature which surrounds the wine area and on the other hand, the buildings and the architecture. Those two elements are further explained in the following sections.

2.4.2. Perception of a wine landscape

Wine tourism offers a whole five senses experience: tourists can of course taste the wine, but they can experience the wine tourism through smell, touch, sight and sound too (Getz, 2000). The landscape is definitely an important factor of it, because it represents the country’s culture and its tradition (Mitchell and Hall, 2006). However, the “winescape”, next to the landscape, according to Peters (1997) includes the vineyards, the winemaking activity and the wineries where the production of the wine is held and where the wine is stored. Charters (2006) tries to analyze and interpret the perception of a wine tourist and states that he or she will have both, a physical and aesthetic perception. The physical perception of the landscape is the appearance of the landscape itself and the aesthetic perception includes perceptual (senses), expressive (feelings, emotions), symptomatic and symbolic (ideas) cognitions, that are created and influenced by the landscape (Charters, 2006).

2.4.3. Wine and architecture

Nowadays, wine and architecture in the winescape are two factors which can’t be thought separately. They are like a symbiosis, which is a “relationship of mutual benefit” (The free dictionary, n.d.), because it combines pleasure with aesthetics and adjusts it to the surrounding landscape. The winemakers want to make the process of wines and its storage transparent for its guests. Everything is well thought-out, in order to bring up a perfect result. (Schlögl,
n.d.) South Tyrol went through a big change during the last ten years. It features a variety of different buildings which are characteristic for this area, like castles, old farms, courtyards, and ancient estates. However, modern buildings have become indispensable for South Tyrol too. So, architects get the chance to create something totally new and original, which fits into the landscape perfectly, but which stands out from its competitors. This project could either be a restoration or a brand new concept (Südtirol – The other side of Italy, n.d.). An example of South Tyrol’s architecture in the field of wine represents the vineyard Manincor in Kaltern, which is the richest wine area of the region. Manincor consists of an old courtyard, which was built in 1609 and a new building, built in 2004. The crucial point of this example is that the whole area is a protected landscape, and that is why the owner of the courtyard, Mr. Goess-Enzenberg, in co-operation with three architects decided on building the construction underneath the hill, in order to adjust it to the landscape, so that it only has a little impact on the natural surroundings (Kaiser, 2004). This idea has some other advantages too, for example the availability of a huge surface, which is about 3.000 square metres and a natural ventilation system for a perfect cellar climate, which helps the storage room to stay dry and in addition it regulates the air transfer, so that the cellar gets the humidity needed (Manincor, n.d.). A second architectural example represents the winery of Tramin, which is a highlight for wine lovers and architecture fans. It is a construction designed by the architect Mr. Tscholl, who covered the facade with green imitations of branches of vine trees, which entwine around the building (Südtirol.info, 2011). Nowadays, the architecture of the wineries contributes to a nice atmosphere while being at the yard, but in some cases the wineries also take the opportunity to become more sustainable with its new covering.

2.4.4. Sustainability in wine tourism

"Sustainable development is a dynamic process which enables people to realize their potential and improve their quality of life in ways which
simultaneously protect and enhance the earth's life support systems". (Forum for the Future, n.d.) On the basis of the winery Manincor, sustainability was already succeeded in its building. In addition, the whole construction benefits from the geothermal energy, which allows heating it up during the winter, while during the summer, the heath returns to the ground. If this is not enough during the winter, Manincor heats the building with its own wood from the private forest, so the whole property excludes petroleum and petroleum gas (Manincor, n.d.). A further step in sustainability is a biodynamic cultivation of the vine, which is the realization of an entire ecosystem, which is influenced by the lunar cycle and natural rhythm. Furthermore, the winemakers do not manipulate the wine with other substances or processes, such as acidity adjustment (Vinny, n.d.). The process of biodynamic is achieved by Manincor as well as by the winemaker Alois Lageder. The owner of Manincor, Mr. Goess-Enzenberg, realized that the new way of doing agriculture is to do everything with machines and some substances that pretend to help and make the best out of the cultivation of plants. But in the end, the result is not the very best what he could have achieved, because the soil is inanimate. The idea of the biodynamic process is that the farmers do not wait until the vines are ill, but prevent the illness with substances, like teas, in order that the plants don’t get damaged and the production doesn’t get affected or delayed. The easiest way to make the vines more stable is through healthy nutritive substances. Mr. Goess-Enzenberg wanted to go back to the roots, back to how the grandfathers and grandmothers cultivated their wines. He tried to create a cycle with the help of animals, like sheep and chicken, because they provide a more natural mucked soil. In addition, his vineyards are not an entire monoculture, but he interrupts the vineyards with trees and hedges and after every second vine there are different kinds of seeds, like flowers, rapes and grains, which make the soil more nutrient. This whole process of biodynamic pays off and can be seen in the good quality and in the great balance of the wine and the wellbeing of the vines. By now the biodynamic process has become
indispensable for some of the best winemakers in South Tyrol (Manincor, n.d.).

2.4.5. Vinum Hotels

Coming back to wine tourism again, South Tyrol helps to develop as a wine touristic region with its upcoming trend of the wine hotels. 29 wine hotels brand together in the past year to the “Vinum Hotels”, which are all located in one of the seven wine areas of South Tyrol. This union of wine hotels is very new; hence, they still need to develop a lot. The owners of the hotels deal with wine and do not just have a high knowledge about it. They are real wine lovers, who want their guests to experience the wine region to the fullest. The hotels are entirely focused on everything concerning wine, like cellar visits, wine hikes, wine tastings, wine events and wine seminars. The brand of the wine hotels promises an authentic wine experience that can fulfill the high expectations of the wine tourists, in collaboration with experts in the wine field as well as the wineries (Vinumhotels, n.d.). The brand is very new and needs some time to settle down, but it is certainly a brand which brings some benefits with it and contributes a certain part to South Tyrol as a wine region and to its wine tourism.

To summarize, the region tries to enhance itself through several different ways, for example through its authentic architecture, its particular awareness of sustainable and biodynamic processes and its authenticity of experiencing the wine, just to be present in some wine-interested heads of future guests and already existing ones. Nevertheless, South Tyrol has always an opportunity to do things better and to improve itself in developing wine tourism even more.
3. Methodology

In this chapter, the approaches are shortly explained and analyzed that are used to retrieve the data for explanatory reasons.

3.1. The interviews

To get the empirical data for this study some interviews were held. Those interviews, specifically the questions of the interviews, are the result of primary data research, which is done by the researcher itself for his or her specific purpose. Secondary data are sources which are collected by others for other purposes. That information can be retrieved from various ways, such as scientific articles, journals and published materials on the internet (Hair, 2013). The research approach, which is used for the interviews, is the qualitative research approach, which “involves looking in-depth at non-numerical data” (Boyd, n.d.). Its advantage is that it gets a high quality of answers from the participants and their subject perspective (Hair, 2013). However, there are some disadvantages too, which are for instance the lack of generalization and in the case of this thesis the rather low quantity of data because of the time factor and the time constraint. The outcomes of the interviews were entirely used for the SWOT analysis afterwards. The interviews of this study were in-depth interviews. They are characterized by “a formal interview process in which a well-trained interviewer asks subject set of semi-structured questions in face-to-face setting” (ibid). The interview participants were five pre-selected people, all living in South Tyrol. The first one was Mrs. Stefanie Pramstrahler who works at the “Südtiroler Weinstraße”, which is a designated wine road along the vines in South Tyrol. The second interviewee was Mr. Goess-Enzenberg who is the owner of the winery “Manincor” based in South Tyrol. The third interview was held with Mrs. Sarah Filippi and Mrs. Martina Stürz from the organization “Wein.Kaltern”, which is an organization for the old wine village Kaltern, to revitalize the wine culture in the village for everyone, its wineries, its hotels,
its inhabitants and its tourists. The forth and last interview was held with Mr. Ganthaler which is the president of the Vinum Hotels and hotel owner of “Muchele” in Burgstall. All of them were asked nearly the same open-ended questions to have a clear outcome for the SWOT analysis.

3.2. The SWOT analysis

The information that was retrieved from the interviews was then used for South Tyrol’s SWOT analysis. A SWOT analysis is a method to identify the strengths, weaknesses, opportunities and threats of something like a company, a destination, etc. The first two factors are internally, which in the case of South Tyrol can be handled by the destination itself or by its wine area. Furthermore, opportunities and threats are external factors, on which the destination has no control on. The final step of the SWOT analysis is to try to mutually minimize the negative factors and to maximize the positive ones (Berry, n.d.).

4. Results

In this chapter the SWOT analysis of South Tyrol as a wine destination is represented in detail, but at first a short introduction to the results is given.

4.1. Introduction to Results

As mentioned at the beginning of this thesis, South Tyrol as a touristic destination is highly influenced by the Tyrolean and Italian culture because of its historical background and offers a wide range of tourism attractions. It shows predominantly possibilities of outdoor activities with its great infrastructures, like hiking trails, skiing slopes, swimming lakes or mountain lakes, but there are also museums, like the one of the iceman “Ötzi”. The greatest part of tourists who visit this area come from German speaking countries. In fact, Germany makes the biggest percentage out of it, which was 43,4%, Switzerland with 4,5% and Austria with 4,4% in 2012. Those countries
like to spend their holidays in South Tyrol because of the convenience of still having the possibility to speak their mother language and of being able to access the region by car. Another important market for South Tyrol is its own country, Italy, with a percentage of 37.6% (Institut für Wirtschaftsforschung, 2013).

However, South Tyrol as a wine region which tries to take care and improve its wine tourism, carries out special wine attractions such as the wine days, weeks of wine tasting, wine festivals or wine hikes. But in the end, South Tyrol’s tourists are still more interested in hiking or biking than in experiencing its wine culture. Only professionals and some wine-interested tourists participate in those attractions like the “International Wine Festival” in Meran (Hechensteiner, 2010). Yet, this has to change says Helmuth Köcher who is the president of “Gourmet’s International”. According to Hansjörg Mair, South Tyrol’s wine tourism needs some better marketing and coordination of local stakeholders in the destination. In the current situation, individual stakeholders try to make their own profit, and see each other more as competitors instead of co-operators. In addition, the majority of the stakeholders do not really realize how big the potential of the market segment of South Tyrol’s wine tourism could be (ibid.). In order to make a difference, the destination needs to develop into a more attractive wine tourism oriented destination, with a solid stakeholder management and consequently a centralized and better organized marketing strategy. The next section will analyze the region using a SWOT analysis.

4.2. SWOT analysis

In order to see where South Tyrol is strong and where it is weak and which opportunities it has to grow or threats that make South Tyrol’s wine tourism more difficult, a SWOT analysis has been generated to deconstruct the region as a touristic wine destination. The first step is to reflect the strengths, weaknesses, opportunities and threats from an external point of view.
Afterwards, those key observations are put together to build up some strategies or to give some recommendations for the development of the region in the future. The aim at the end is to maximize all the positive elements of strengths and engage into opportunities and to minimize the negative ones meaning all the weaknesses and threats.

The chart below represents the SWOT analysis of South Tyrol as a wine destination:

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**Figure 3: SWOT Analysis of South Tyrol's Wine Region.**
Adapted from the four interviews, by Isabelle Zuegg, April 2016.
4.2.1. Internal analysis

Strengths

S1 – The biggest strength is the South Tyrolean package, where all factors do not stand alone but are one product and everyone benefits from each other, like synergies. South Tyrol as a tourist destination, but also as a wine destination, profits from its climate, which is influenced by the mild mountain climate of the Alps and the Mediterranean climate of Southern Italy. South Tyrol has about 300 sunny days per year, because of the protection of the mountains. This of course is where the landscape and nature benefits from and why tourists find this region so attractive. The landscape is multifarious and shows so many different types of landscape on only 7,400 km², for example high mountains, beautiful lakes, different types of agriculture fields, like grapes, apples, apricots, potatoes and asparagus and the flair of old and new architecture that is combined in this region.

S2 – The South Tyrolean cuisine is another big advantage of South Tyrol, because it has been cultivated since many years and has improved and expanded a lot. At the beginning, traditional meals such as “Polenta” or “Knödel” were seen as easy dishes and food for the poor. Nowadays, it is offered in nearly every restaurant and represents the South Tyrolean culture which is influenced by the traditional old South Tyrolean cuisine and the Italian culture. However, the unique South Tyrolean kitchen is very popular and tourists specifically come to the region to experience it personally and still it has so much more to offer. There exist about nineteen restaurants with 23 Michelin stars in South Tyrol, which clearly states that the region has a big potential and a high quality in this field.

S3 – South Tyrol is indeed a small region and makes out 0.7% of the Italian’s wine economy. Out of those wines over 90% are characterized with the DOC seal, which is a controlled designation of origin of Italy. South Tyrol set a high value on quality and that is why it makes this region so special. It also won
many awards for its wines, which is great for such a small region and such a small share of wines growing there compared to the whole country Italy. But not just the wines have a high quality, also South Tyrolean’s food as mentioned before is very famous for its high quality and also the friendliness and the professionalism of the various hotels.

S4 – The hospitality in South Tyrol is appreciated very much by its tourists. It is a region that for the most part lives from its tourists and from being a touristic destination. South Tyrol does not really have those big chain hotels, but rather offers small family owned businesses that are cultivated by its generations. South Tyroleans since many years learned how to work in the hospitality field and know how to satisfy a customer. At the same time they do not play any role, because they do their work with their hearts; they are friendly, courteous and know what a customer wants to fully experience this region. The locals are authentic in what they are doing, which stands in relation to its culinary tourism, its tourism in general and its traditions such as wearing the traditional dress, the “Dirndl” and making some music events with their brass bands, that all together make a tourist’s experience worthwhile.

S5 – South Tyrol features an important history for its region, which is still very present today. It is indeed an Italian region; however, 69% of the locals speak German because it belonged to Austria before the 1st World War. Today, South Tyrol benefits from this loss in the past, because of its multilingualism. Especially the tourism field can take something out of it. Next to the 69% of Germans, 26% are Italians and 5% are Ladins (which is a Romanic ethnos) and 9% are foreigners (Astat, 2013). Nowadays, schools also teach English, which is already and in the future will be even more a huge advantage for South Tyrol’s tourism.

S6 – After having heart everyday’s’ news that so many bad things are going on in the world, some tourists just want to spend their holidays somewhere
nearby and in a safe place. South Tyrol is a small region where many people still live in some kind of a “bubble” in relation to its safety, because nothing very dangerous happens there. Both, locals and tourists, feel very secure in this region. Tourists like to spend their holidays in this quiet environment; they can relax and calm down, whereas this might be more difficult in some very popular holiday destinations or cities.

S7 – South Tyrol has three indigenous grapes that stand for its region, which are the white wine “Gewürztraminer” and the two red wines “Lagrein” and “Vernatsch”. Those three grape sorts are not really the classical wine grapes that everyone knows. However, this could be an opportunity for South Tyrol to build up a homogenous image of South Tyrol’s wines, which focuses on its old traditional wines and promotes them as their main sorts.

Weaknesses

W1 – Unfortunately, there are many organizations and societies in South Tyrol that work together in some way in the wine sector and are also mutual members in those. The result of that is that there are a lot of activities that go parallel in those organizations. They have nearly the same offers and sometimes there are many events right after each other or even on the same day. This has as consequence that internal members of organizations or societies like winemakers leave some institutions, because it is getting too much for them and they even have to pay a fee in every single organization in order to be a member. Another consequence is that tourists are getting very confused because of too many organizations, events and offers that are quite similar.

W2 – To connect on this argument, every organization owns a website and that contributes to why it could leave a tourist a bit confusing. In this matter, South Tyrol does not really focus on quality. A tourist does not often think further, he or she just wants to go on holiday and tries to organize some things they could do during their stay. If the tourist does not understand how
all those organizations are related to and different from each other and when he or she does not understand what the advantages are of those individual organizations, it makes his or her planning of a holiday more difficult and makes it frustrating.

W3 – South Tyrol has about 25 different grape sorts, which is a lot. On the one hand, it is of course great that South Tyrol has the availability of several factors, like soil and climate, to grow all those different kinds of grapes. On the other hand, it is very hard to promote them all and to give South Tyrol a clear and transparent profile and positioning, such as Bordeaux for example. The wine region Bordeaux makes predominantly its Bordeaux wines for which it is famous for. For South Tyrol, this means that its grapes are often not well known, because they are more or less grown only in this region and there are too many of them.

W4 – As mentioned before, South Tyrol’s main market is Germany. However, it tries to expand and attract new markets, in order to not being dependent on just one market. Nevertheless, South Tyrol’s problem is its connectivity which means that it is only accessible by car or train. Also, as soon as a tourist is in South Tyrol, he or she is more or less reliant on a car. Today’s discussions come down to build an airport and the problem of the closing of the border to Austria, the Brenner, because of the immigrants. Both topics will have a big influence on South Tyrolean’s tourism in the future and its accessibility. That refers to either being more competitive and accessible to the broad public if the airport is built but risking mass tourism or having a competitive advantage of being more difficult to reach and being some place special to visit. The closing of the border could implicate not being considered as an attractive tourist destination anymore because of the traffic jams at the Brenner and the immigrants which are caught in South Tyrol.
4.2.2. External factors

Opportunities

O1 – Nowadays, most of the people who live in cities are continuously stressed because of their jobs, their hectic lives, new technologies that make their lives more difficult because people need to be available 24/7. The urge to live healthy and to be sustainable was never this high before. People want to know where products come from and set value on their health. Likewise, tourists want to get back to the roots of an easy and authentic life. In South Tyrol tourists can emerge into the landscape and are directly in touch with the authentic way of life and traditional, fresh products. That is why people try to go on holiday to a remote and safe place where they can calm down and relax, where they live healthy and sustainable in a way and where they feel the authenticity of an easy lifestyle outside of the city. South Tyrol is one of those places that contains and combines all of those things. Therefore, it has a huge opportunity in promoting itself as a healthy, safe and sustainable region to visit and to calm down from everyday life and to experience the authenticity of this region and become part of it.

O2 – South Tyrol’s wine tourism has so many organizations, that it represents an opportunity to establish one homogeneous organization, that stands above all other organizations and coordinates and promotes the region’s wine tourism outwards. However, to build up such an organization everyone who is a part of South Tyrol’s wine tourism needs to understand the advantage of it and how important it is to work together. The current entities need to understand how important a clear and transparent outside communication and promotion of South Tyrol is: one winery alone has no chance of being recognized, whereas South Tyrol and all its wine organizations under one family brand have much more advantages and opportunities to become more popular and qualitatively better in this area.
O3 – As mentioned above, South Tyrol could become more known in other markets if it is *more easily accessible* for them. Some co-operations with train services like the “Deutsche Bahn” have already been started and are in progress. Also, South Tyrol has some airports in its surroundings, such as Verona or Innsbruck. However, those are a minimum of two hours car drive away. The establishment and the re-usage of the already existing airport in Bozen, the main city of South Tyrol, could open way more doors to attract new markets for South Tyrol’s tourism in general. In addition, tourists are becoming more and more comfortable and so the probability that tourists accept to drive more than 400km to their destinations by car is declining. This means that South Tyrol needs to look ahead in order to make it more comfortable for a tourist to reach his or her end destination. To stay a remarkable competitive market in tourism this might imply that the airport in Bozen is indispensable in the future.

O4 – The new group of hotels which has its focus on South Tyrol’s wine tourism are the *Vinum Hotels*. It is the first hotel co-operation which exists in Europe that combines the three factors of vine, cuisine and accommodation, where wine represents the main factor. This hotel group exists since a short period of time and tries to help the wine tourism to benefit from it and to develop it in a positive way for both sides.

O5 – South Tyrol has a huge advantage with its variety of different wine types. However, sometimes the wines are not always promoted properly by culinary oriented organizations. One reason might involve the low knowledge of the wines by the employees. Those culinary oriented organizations such as restaurants need to work more closely with the wineries and need to have at least one who has a good knowledge about the different wines they offer (like a sommelier) in order to enhance the image of South Tyrol as a wine region with high quality wines and to increase the recognition of its wines.
**Threats**

T1 – One of South Tyrol’s threats in wine tourism is the *parochial politic*. The parochial politic appears when groups like societies or municipalities only go for their own advantage and want to be better than their like-minded. This can become a discrepancy because on the one hand those societies need to work together for example when they represent South Tyrol outwards while on the other hand they are competitors and want to be better than the other group/society. Nevertheless, the parochial politic is nothing where South Tyrol makes a profit out of it, so it would be better to abandon it and work together for everyone’s wellbeing.

T2 – Since several years *climate change* has become a crucial topic in the tourism branch where the wine tourism is also an important element. Winemakers such as Mr. Goess-Enzenberg already feel some changes in the winemaking process. One of the changes is that the average air temperature increases and so the winemakers need to start planting their grapes higher up on hills or mountains, because it is getting too warm for them. This problem might also result in the need to come back to other grape sorts, which are more warm resistant such as Spanish grapes. However, in today’s world climate change is a relevant topic but it is still kept within a limit and its dimensions and impact is still not very clear.

T3 – South Tyrol is a small region with a small share of wines. However, it produces good and high quality wines which have a *high competition* outside of South Tyrol. Whereas, internally South Tyrol does not feel how high the competition is, because everyone feels quite satisfied with what they offer and what they do. Wineries often are closed for tourists on Sundays, which actually is a very important day for tourism. Also, their offers do just slightly improve each year, because it is running good for them right now. In addition, competitors outside of South Tyrol have developed further and went beyond just producing wine. Some have accommodations in the winery;
others offer a restaurant with dinner and wine tastings. If South Tyrol does not actively expand further and develop into new areas how its competitors have done, this could become a big risk for wineries in the region and leave them not competitive enough in regard to the competition elsewhere.

T4 – Wine tourism is a niche market and not for every kind of tourist. This means that often wine is not the main motivation to go on holiday or to choose the holiday destination. That makes this market rather small and hence it is still in its developing phase, like a trend that came up a few years ago. Its threat is seen in not becoming one of the main motivations for more tourists when going on holiday, because those tourists really develop this tourism branch.

T5 – If new infrastructures such as the airport are built, South Tyrol could attract the new types of tourist on which it hasn’t been focusing on before. A normal tourist in South Tyrol has about 105€ of expenses daily, whereas a wine tourist in general pays about 260€ per day. If for example low cost flights start to land in South Tyrol, mass tourism and low cost tourists, who want to make holidays for little money, could be the outcome, which is not advantageous for South Tyrol’s wine tourism. This is a threat for South Tyrol’s tourism generally, because with mass tourism and lower prices the high quality would decrease and the region could lose its image of a special holiday location with high standards as it has been until now.

4.2.3. Recommendations and strategies

Strengths and Opportunities

S6 – O1: South Tyrol is seen as a remote and safe region, which is very close to its main market Germany too. Safe can be seen as two different ideas, where the first idea is that the region is not dangerous and the criminal rate is low; whereas the second one is more seen in a way that people know what they get as a destination product. The life there is held rather easy but still
feels very authentic, which is supported by its traditional culture of music, food and traditional clothes, like the “Dirndl” and the “Lederhosen” and other traditions, which is highly protected by its inhabitants and its hospitality. People of today often want to escape from their everyday lives, because it is too hectic and they are curious to experience how it feels to live in an authentic and easy way, outside from cities surrounded by friendliness and easiness of life. In addition, South Tyrol gives tourists the possibility to live healthy. People can go hiking through the natural finish environment and swim in natural lakes. Also, they can consume regional products, which are processed to high quality wines, cheese, marmalades and jams as well as other typical products.

S1, S2, S4 – O4: The Vinum Hotels as mentioned before is a hotel group that deals with everything that is related to the topic wine. However, the hotels in general need to market the whole South Tyrolean package, which is its landscape, its climate and its attractions. Furthermore, the hotels need to focus on a high quality restaurant, which does not mean that it should be extravagant. South Tyrol’s dishes are easy, rather economic, but very good in taste and of high quality. If the hotel does not own a restaurant, then it needs to have some good hints where its guests can go for lunch or dinner to enjoy the South Tyrolean cuisine. Nevertheless, what is important in a restaurant owned by the hotel or not, that the staff members are well educated wine professionals who need to know which wines are good companions to which dishes and share their knowledge through giving advice to their guests. All those elements are very important for this new hotel group concept in order to become a well recognized hotel group which has its main focus on its regional wines.

S5 – O3: South Tyrol benefits from its multilingualism. However, the older generations mostly only know one language, either Italian or German and have some difficulties to learn English, especially because years ago it was not so important to be learnt. But today the young generation set value on being
multilingual and on travelling and knowing other cultures. This could be a huge advantage for the upcoming years of becoming more international, because whatever tourist comes to South Tyrol, he or she can communicate in German, Italian or English. It is of course not possible to generalize that everyone has a good command of all three languages, but it is improving and increasing a lot since the last years.

**Strengths and Threats**

S1 – T4: The problem is that wine is often not seen as main motivation why people book a holiday, because it does not have a huge bandwidth of people that it can reach. That is why South Tyrol needs to promote itself and the package it has to offer including its wine, because it is a main pillar that constitutes South Tyrol’s attractiveness. In this way, the wine tourism in the region can become more known and the attention of people even of those that are only slightly interested in wines can be attracted, so that they might become “wine passionate newcomers” or “followers”.

S1 – T3: The competition of South Tyrol’s wine tourism is quite high and so South Tyrol cannot do the mistake to stop its promotions and not develop further. South Tyrol has to look out of the box to its competitors even outside of the region, which are its real ones, and not orient themselves to South Tyrolean standards where actually everyone works together in a way, because the standards are way higher in competitive countries. Maybe it is not as known as the most popular wine regions, but it has all factors given to become one of them. South Tyrol’s wine tourism benefits from its natural environment, its climate and its attractions, like from its wine hikes through the vineyards, talks with some experts and tastings of its high quality wines. The whole atmosphere already exists where tourists can fully experience the wine tourism and that just underlines the competiveness of the wine region that has to be further promoted and expanded.
Strengths and Weaknesses

S3 – W2: Nowadays, the web presence is one of the most important ways to attract new customers and to be competitive. Right now, the homepages of South Tyrol which are related to wine and wine tourism are a lot. Nearly every society, organization or wine village has its own homepage and most of them present nearly the same contents, which makes the search of a tourist rather confusing than easy. This has to change if South Tyrol’s wine tourism organizations want to perform qualitatively better in this field as well. The main focus lies on the right positioning of every organization. All of them are similar but all of them have different qualities in which they are experts, so they should focus on what they are standing for and what they are doing best and leave the rest to other societies. Following this way, South Tyrol’s wine tourism could improve very much.

S3, S7 – W3: South Tyrol has about 25 wine sorts, which is seen to be difficult to promote. As a region that focuses mainly on quality, it should take its three indigenous grapes Gewürztraminer, Lagrein and Vernatsch that stand for South Tyrol in order to give its region a clear profile. This can be a strategy for South Tyrol as a wine region to improve its image and enhance recognition among other wines. Once this is established, other wine sorts can be added to the assortment to be promoted.

Weaknesses and Opportunities

W1 – O2: South Tyrol does not possess a homogenous structure that represents the region as a wine destination. According to Mr. Waldbot, there are indeed many organizations that promote the destination as a wine region. However it is often not their main motivation and if it is, they just promote a small part of South Tyrol and not the entire region as a wine area. That is the reason why a homogenous structure which shall be in charge of solely the wine tourism in South Tyrol is really needed to directly approach the wine tourists. The “ideal” organization would be one single association
that acts for and promotes the whole region and which combines the two economies of tourism and wine. The new installation of the Organization “IDM”, which stands for “Innovation, Development and Marketing”, is going to become effective starting from 1st January 2018. This is a tourism reform that is responsible for South Tyrol’s development and regional promotion (Waldbot, 2016). According to nearly all my interviewees Mrs. Pramstrahler, Mrs. Filippi, Mrs. Stürz and Mr. Goess Enzenberg, the IDM could become this new and homogeneous organization responsible for wine tourism in South Tyrol that is so much wanted and required. Another possibility that Mr. Waldbot mentioned, is to take an already existing organization that could be extended, in order that it operates for the whole region, for instance the “Südtiroler Weinstraße” or South Tyrolean wine road (Waldbot, 2016). No matter which new organization will become responsible for South Tyrol’s wine tourism, most of the interviewees think that it is necessary to do something to develop and to enhance this tourism sector throughout the region.

W4 – 03: South Tyrol does not want to be reliant on just a few main markets but wants to start to attract new markets and this is not easy because of its weak infrastructures. To become more competitive and to make travelling easier (this even concerns the German market because sometimes tourists needs to travel more than 10 hours by car) the reopening of South Tyrol’s airport would be advantageous for its tourists and also for its locals. Nevertheless, South Tyrol needs to pay attention to not attract the wrong type of people so that the quality factor is not lost on the way of change.

Weaknesses and Threats

W1 – T1: South Tyrol has too many organizations that work for their own progress and benefit, which is called parochial politics. However, many of those organizations should actually work together because of mutual internal members and this could raise the chance to expand together. But this often is
not the case and becomes a huge disadvantage, which can cause internal damages for several of those organizations. The new organization which is required shall stop the parochial politics and make people realize that only by working together everyone can perform better. By being represented externally as one entire union every society can benefit from each other.

**Opportunities and Threats**

O5 – T3: As mentioned above, wine and food are two elements that cannot be thought separately. If South Tyrol set value on a good collaboration between wineries and culinary oriented organizations, that wines are promoted properly and the staff is well trained in the field of wines, it has a big potential to stand out from the crowd. This is not only because of its high quality wines and high knowledge about it but also because of its good and friendly hospitality as well as its traditional cuisine.

All those recommendations and strategies stated above could help South Tyrol to grow as a wine destination and to enhance and further develop its wine tourism. With a clear and transparent communication of the South Tyrolean experience by one entity the region could arise to an appreciable wine area in the market that is worth to visit.

**4.3. Limitations of results**

This section states some limitations that were evident during this research.

The number of the respondents of the interviews was rather low, which resulted in four interviews in total with five interviewees. However, it is not certain if the same result would come out when interviewing more than just five people who are familiar with the topic of wine tourism in South Tyrol. Due to this reason, the findings that result of those four interviews are not completely reliable. In addition, it is doubtful what all the other organizations think about the spill over of organizations and if a homogeneous structure is
necessary. Another limitation is the factor of time that was not enough to have had the possibility to interview more respondents.

Nevertheless, when considering those limitations to the result, the momentary performance of South Tyrol seems quite satisfying.

5. Conclusion

In the following and last chapter the outcome of the performance of South Tyrol as a wine region is summarized and the research question of the Bachelor thesis will be answered, which was stated as such: How can South Tyrol enhance its wine tourism for a better future performance and positioning in the wine industry?

South Tyrol is already a strong tourism destination, which is highly visited by the German speaking market. Its wine tourism benefits enormously from this fact and will do so in the future too, because it is only a niche market of the whole tourism field. However, it also makes the destination more flexible through the offer of new activities related to wine. Nevertheless, South Tyrol’s wine tourism has to be positioned underneath a family brand “Südtirol” and has to be promoted through the South Tyrolean package, which is its unique landscape, its climate and its products. This communication of benefits to tourists represents a great starting point for the region’s wine tourism in order to become more competitive and recognized by the international market. Wineries and other organizations that have a stake in this field need to build up a strong internal cohesion to be promoted in the market as one entity. In addition, they need to benchmark it to other wine regions and find out how they compete in the industry in order to develop further. Although everyone needs to work together to be competitive enough, it is significant that inside the entity within the region there is still a slight competitive pressure present, so that every part of its wine tourism improves thoroughly and continuously,
because there is always something that can be improved in order to make one step onward.

It is important to mention and necessary to understand that wine and wineries often do not play a main factor when visiting South Tyrol. This is why South Tyrol’s wine tourism needs to cooperate with other societies or organizations in order that everyone takes a stake out of it. This could be collaborations with culinary organizations, hotels or other wineries. In addition, it is also very important for the wine tourism itself to become more recognized by the South Tyrolean guests who go there on holiday normally but unfortunately do not spend much time and money on wine. A change here could be achieved by organizing events and promoting activities, such as tours through vineyards, or the possibility to see how wine is actually made. This could reach a broader amount of people that would be interested in participating in such events. Also, it can make wine tourism more interesting for people that belong to the group of the “drinker” for example, who enjoy drinking wine, while being in the nature and see the beautiful landscape.

Furthermore, South Tyrol sets strong value on quality which has already been achieved in many parts. The region is represented as a high quality tourism destination, with good restaurants and nice accommodation, which are mostly family owned and offer high quality products, like wines, cheese and bacon and which attaches great importance to friendliness, authenticity and feeling welcome. Nevertheless, South Tyrol’s wine tourism is in urgent need of a homogeneous structure that coordinates and promotes everything that is related to its main product wine, in order to generate an easier proceeding of a tourist’s planning of his or her holiday and to provide a better understanding for the ones working in the wine tourism.

In today’s situation, some factors that have definitely huge potential in enhancing South Tyrol’s wine tourism in the future are the bio and/or biodynamic production of South Tyrolean wines which stands in relation with
the region itself that should focus on staying as natural as it is and in a way sustainable too, with its unspoiled landscape, its regional products and the easiness of life that characterizes South Tyrol. In addition, nowadays, people try to find remote places that provide pleasure and recovery from their stressful everyday lives of urban places. People recognized the necessity of paying attention to their health and want to live more sustainable. Therefore, South Tyrol has a huge chance to become known as a sustainable, natural region that cultivates its own products and promote this fact even more.

South Tyrol is already doing well as a wine destination which benefits a lot from its actual tourism and existing product, for which tourists come to visit South Tyrol. However, there is a huge potential and a lot of space to do improvements on the current position. The combination of all those examples if they are carried out correctly can help South Tyrol to enhance its wine tourism in the future. This might be the support needed to maybe become a well-known wine destination in the international market, because the base product is already given and only needs to be further developed and extended.
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Appendices

1. Appendix: Summary of the interview with Mrs. Pramstrahler of “Südtiroler Weinstraße”, 28th April 2016, appointment at 12 noon, duration of the interview: 52.03 minutes

The organization of the “Südtiroler Weinstraße” which is the South Tyrolean wine road, has several members of different fields such as some wineries, some municipalities and some tourism offices of the affected wine villages. It is an organization which combines the topics of tourism and wine. On the one hand tourism benefits from the high quality wines, the architecture of the wineries and the wineries themselves. On the other hand, wineries benefit from the tourists that come and visit the wineries and perhaps buy some wine and participate in the events that are related to wine. The Südtiroler Weinstraße focuses on the development of the product wine and organizes tours and events such as the “Wine Safari” and “Wine and Architecture” and the “Cellar Night”.

Most of the participants that come and book something directly through the Südtiroler Weinstraße are tourists. However, South Tyroleans are interested in those events and tours too. Mrs. Pramstrahler said that tourists contact the organization directly because they found some interesting activities on the internet or in brochures that are available in many tourism offices and hotels. Yet, according to her it would be more efficient and easier if hotels would work together with the Südtiroler Weinstraße and give information about the activities offered by the organization to their guests and that the hotels book tours for them. But until now, this has not been the case.

Mrs. Pramstrahler said that often there is a lack of communication and a lack of cooperation between organizations, which has to be improved because then everyone will benefit from each other, but this is often not seen by many of them. That is why it is difficult to find a common denominator.
between everyone. This type of politic where people or organizations try to increase their own outcome is called parochial politics.

The Südtiroler Weinstraße has some competitors who want to offer similar activities that the wine road already offers. For example another area (Eisacktal) wants to build up its own wine road. Other locations for example at Meran would like to become a part of the already existing ‘old’ wine road. According to Mrs. Pramstrahler, it would be good to expand the wine road in order to stand out from the crowd and include Meran and Eisacktal as well to maybe become this homogeneous organization that is needed in South Tyrol, but this has not been accepted by some members of the wine road, which have a voice in the decisions made in this organization. South Tyrol is very messy and does not set on quality when it comes to organizations that have to do with wine and wine tourism because some organizations go parallel and offer the same activities. This makes the holiday planning very difficult for a tourist, because he or she does not think in limits. That means for example that tourists who make their holidays in South Tyrol, but who sleep outside from the wine road do not get the advantages of the wine road. As soon as the tourists arrive in South Tyrol they realize that their plans do not work out. That is why something has to change in South Tyrol. According to her an option could be to expand the Südtiroler Weinstraße or the second option is to transfer all the responsibilities to another organization which is build up right now, the IDM Südtirol Alto Adige. That company could take the opportunity to become the main organization of South Tyrol’s wine tourism.

Some disadvantages of South Tyrol’s wine tourism is that everything is working so well, that wineries for example do not open their doors on Sundays, which is actually an important day for the tourism. Plus if everyone feels comfortable there is the risk that South Tyrol remains on the same spot and does not develop further.
SWOT

**Strengths**: landscape, people, culture, hospitality, openness of people, authenticity, quality, weather, culinary culture.

**Weaknesses**: many organizations that go parallel, South Tyrol’s wine tourism has some difficulties to promote itself

**Opportunities**: better communication and co-operation internally, homogeneous organization

**Threats**: climate change, parochial politics, competition does not sleep and South Tyrol cannot stop developing,

2. **Appendix: Summary of the interview with Mr. Goess Enzenberg of the “Manincor” winery, 28th April 2016, appointment at 2.30pm, duration of the interview: 1 hour and 27.58 minutes**

Mr. Goess Enzenberg stated that in his opinion there are too many organizations that deal with the subject wine and somehow everyone works on the same topics. Nevertheless, every board of an organization thinks that they are worth it and do not want to break up. This has as a consequence that people are members in many organizations that often have the same functions and need to pay fees, which can be very costly. The solution for that could be an organization that stands above all the other organizations and coordinates and promotes South Tyrol as a wine region and promotes the region towards the outside. The IDM Südtirol Alto Adige could be a good start to do it. Also, in the field of the wineries it is often the case that agricultural co-operative societies band together to become more competitive and stronger.

The wine tourism has developed extremely since the last years and it is like a new trend which stands in its initial phase. The South Tyrolean wine tourist is an individual who wants to experience something, who is sustainable and
who sets value on quality and not on mass. ¼ of Manincors’ wines is sold in
the winery itself and around 4,000 people per year come and visit the winery.
However, usually wineries do not sell directly in the wineries so much, but
Manincor has such a good reputation. The main markets for wineries are
wine shops and restaurants.

In general, South Tyrol’s tourism has improved enormously for example the
service, hospitality, authenticity, recognition of a guest’s desire and the
wellbeing of a guest. Those things are very important and that is the right
way to win some more patrons. Nevertheless, South Tyrol has still a lot of
space open to improve.

**SWOT**

**Strengths**: climate, nature, many opportunities to do, multilingualism, safe
and close region, quality

**Weaknesses**: too many sorts of vines and that is why it is hard to promote
them all

**Opportunities**: promoting South Tyrol as safe region, healthy way of living,
professional promotion of the region

**Threats**: climate change

3. **Appendix: Summary of the interview with Mrs. Filippi and Mrs.
   Stürz of “Wein.Kaltern”, 29th April 2016, appointment at 10am,
   duration of the interview: 1 hour and 10.49 minutes**

“Wein.Kaltern” is an organization that deals with the topic wine in its own
village called Kaltern. Its name means that wine stands in front and the village
in the background and it supports everything that has to do with wine. Some
time ago, a tourist did not really recognize that he or she is in a wine village
and Kaltern is actually one of the most known wine villages in South Tyrol.
That is why in the year 2000 people from different fields, which have however a stake in the wine branch of the region, band together to found the organization Wein.Kaltern which is in charge of the wine culture of its village and the high quality of its wines. So the organization built up step by step some wine hikes, wine buildings, which were either restored or newly built, to make the wine tourism in this village more authentic and noticeable for its guests. There is also the wine academy and a wine museum situated in this village. This organization contains different types of people of the village, like winemakers, accommodation providers, restaurants, that have a strong cooperation with each other and which form some synergies. The strongest synergy is the one between Wein.Kaltern and the tourism office of the village.

According to Mrs. Filippi and Mrs. Stürz, South Tyrol already improved enormously due to the development of the family brand of “Südtirol”, which did a good job in positioning South Tyrol correctly in the international market. The tourism reform in South Tyrol together with the IDM Südtirol Alto Adige beginning on 1st January 2018 could help South Tyrol a lot in order to reduce the existing organizations that have to do with wine and in order to improve South Tyrol’s tourism in general. With this reform the eight existing tourism associations are going to be disposed and three regional management entities (RME) are established (West-, Middle- and East-South Tyrol) that stand under the IDM Südtirol Alto Adige and coordinate South Tyrol’s tourism. Underneath those RMEs there still exist the tourism offices of the villages. Nevertheless, such organizations such as the Südtiroler Weinstraße have to be preserved because they are different and something special and therefore it is even more important to position those organizations correctly, in order that they do not stand in the way of someone else’s activities. The more South Tyrol promotes itself outside the region, the more important it is for small organizations to stand under the family brand and pull together. The next step for South Tyrol is to try to get new markets on board and that is
why a good positioning is very important, which in South Tyrol’s case is its
mountains, its landscape and nature and its high quality wines.

**SWOT**

**Strengths**: quality of wine, small region but is able to win some certificates,
band together of winemakers, three indigenous grapes

**Weaknesses**: some people do not work together, although it is very
important; locals do often not see that South Tyrol produces such great
wines, South Tyroleans are too modest

**Opportunities**: life is getting more stressful and people live often in cities →
people want to relax, calm down in a remote place outside from cities. They
want to live healthy, sustainable and set value on their health. They want to
feel the authenticity of a place and want to know where products come from.
South Tyrol can do well in all of those points and this is a big opportunity to
promote South Tyrol in this way; safe region: 1. not a dangerous place, 2.
tourists know what they will get as a product in South Tyrol.

**Threats**: mass, competition → that is why South Tyrol cannot stop, fear
because of something new.

4. **Appendix**: Summary of the interview via email because of
unavailability, with Mr. Ganthaler of the Vinumhotel “Muchele”.

South Tyrol improved very much over the past years and today the region is
the most qualitative wine region of Italy. Most of the winemakers just have a
field of 0,8Ha which is very small, and that is why most of the winemakers
deliver their grapes to wine cooperatives, which are about 16 and deliver
about 75% of the wines. There are also 40 private wineries that deliver
around 20% of the wines and the “free wine farmers”, which is an association
of winemakers who do the whole production and marketing on their own,
that deliver 5%.
Mr. Ganthaler stated that the culinary habit changed during the last years, because in the past, people ate solid dishes accompanied with stronger wines. Nowadays, it changed completely, because people want to eat lighter and healthier and so lighter wines are required. This is a big chance for one of the indigenous grapes of South Tyrol, the “Vernatsch”, to compete with the international wine market. However, around 60% of the South Tyrolean wines are already consumed by its locals, so its main market is the domestic market.

South Tyrol’s future is on a good track if it keeps its quality on such a high level. But not only the wines are of very high quality but also some culinary products, like dairy products, fruits and meat.

Mr. Ganthaler explains that both the normal tourism and the wine tourism are based on small family owned businesses that guarantee contact to the guests, friendliness, good hospitality and the authenticity of the way of living. According to him, the accessibility of the region is important and that is why it is necessary to have good train connections (on which South Tyrol is already working on) and to have an airport nearby. The reason for that is that people are getting lazier and do not want to drive far by car, so in the normal case they go on a plane or come by train, which is difficult in South Tyrol’s case.

The competition is high in the tourism branch. South Tyrol established a new hotel group where hotels band together and where the competition is not that high. This group of hotels is called “Vinum Hotels”. Those hotels combine the three factors of wine, cuisine and accommodation, where everything is focusing on wine and thus represent the first hotel cooperation of wines. All of the hotels need to fulfill some criteria, which are for example that they need to be located in a wine area; all types of wine glasses need to be provided at the hotel; South Tyrolean wines need to outperform in the wine menus; regional cuisine that needs to base on South Tyrolean wines and the
offering of wine activities such as wine tasting, wine seminars, wine hiking, etc.