



UNIVERSITÀ DEGLI STUDI DI PADOVA

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Factors driving wine tourism diversification in Veneto
farms: The Valpolicella case

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Abstract

This study investigates the motivations behind the diversification of wine farms into wine tourism activities in the Valpolicella region of Veneto. The main objective is to understand the factors that drive wineries to expand their business models to include eno-tourism. To achieve this, a questionnaire was distributed by the Valpolicella Wine Consortium to local wineries.

The survey collected data on both the characteristics of the entrepreneurs and the specifics of their businesses. Key entrepreneur attributes examined include age, gender, education level, and whether they have children involved in the business. Business-related data were also gathered, such as the primary activities of the wineries, the markets in which they are most active, and the amount of land dedicated to vineyards.

The results indicate that the average entrepreneur that answered in the survey is around fifty years old and male in 88,2% of the cases. Most of these entrepreneurs hold a university degree and have entered the business by inheriting it from a parent. Additionally, these entrepreneurs typically work full-time within their wineries.

Among those who have diversified into wine tourism, the main activities include winery tours and wine tastings. The primary motivations cited by these entrepreneurs for entering the wine tourism sector include personal stimulation, leveraging the scenic location of their wineries, enhancing brand image, increasing customer loyalty, adding value to their products, and raising brand awareness.

These findings provide valuable insights into the demographic and business profiles of winery owners in Valpolicella, shedding light on the factors influencing their decision to diversify into wine tourism. Understanding these motivations can help develop strategies to support and promote wine tourism in the region.

1.0 Introduction

Corporate diversification is a crucial strategy for modern businesses, aimed at reducing risks and seizing new growth opportunities. This approach involves expanding activities into different sectors or new geographical areas to broaden the market base and increase business resilience. A prime example of such diversification can be seen in the Eno gastronomic sector, which continues to prove itself as a key driver for enhancing tourism offerings and fostering the economic, social, and cultural development of a region.

Eno gastronomy is no longer confined to purchasing local products, tasting traditional dishes, and wine tasting; it has expanded to include visits to production sites, historic and gourmet restaurants, participation in food tours, wine tours, and themed events. This expansion has made Eno gastronomy a powerful catalyst for excursions, creating a clear connection between culinary pleasures and recreational activities. The variety of experiences offered engages all the senses and promotes an active enjoyment of the local cultural heritage, positioning Eno gastronomic tourism as a new form of cultural tourism. This is achieved through the preservation and enhancement of agricultural and viticultural landscapes that frame this new way of experiencing a vacation.

Today, these experiences are widespread, with nearly all tourists partaking in them during their travels (94%). In 2023, in Italy, the categories "Food, Wine & Nightlife Tours" saw the highest growth in bookings on TripAdvisor (+141%) (R. Garibaldi 2023). However, it is essential to distinguish that for more complex products, such as wine, the perceived offer can seem homogeneous. Therefore, it is crucial that proposals evolve and differentiate to meet the diverse needs of tourists.

Wine has established itself as an outstanding ambassador of its region of origin, becoming a powerful tool for marketing and cultural promotion. It embodies the perfect blend of tradition and innovation, with the latter being the key differentiator that wineries must leverage. This study aims to delve into the topic of why a company chose to diversify its offer into a wine tourism which is a recent and dynamic phenomenon. In this case will be managed by exploring it in terms of demand, owner profiles, offering strategies, with a particular focus on winescape, kind of terroir, and territorial marketing.

To gather significant data, a questionnaire was administered to companies in the Valpolicella region. This tool provided valuable insights into their experiences and strategies within the wine tourism sector.

In the following section, the concept of business diversification is introduced, and wine tourism is explained from both a conceptual and legislative perspective and in relation to the Veneto wine sector and the Valpolicella region. Section three describes how the questionnaire was organized. Section four presents and analyzes the results obtained from the questionnaire. Finally, section five discusses the interpretation of the results and their implications for the companies involved.

1.1 The corporate diversification

The diversification within a company is a strategic response to the evolving agricultural and socio-economic landscape. In the last few years, the world is pretty changed, we are facing the climate change which distorts the season and it causes damage to the agricultural sector. This leads to unpredictable growing seasons, making crop management difficult; moreover, prolonged droughts, heatwaves, and unexpected frosts can devastate harvests, reducing yields and causing economic hardship for farmers. The shift in climatic conditions also promotes the spread of pests and diseases, necessitating increased pesticide use, which harms the environment and human health and the soil degradation and loss of arable land due to salinity and erosion further compromise agricultural productivity. Furthermore, also the society is changing and the consumer of 10 years ago is not the same anymore. Today's customers are more conscious of the environmental and ethical implications of their purchases, they demand greater transparency from companies about the sourcing and production of their food. (Bonfiglio, Abitabile, & Henke, 2022)

Given these significant shifts in climate and consumer behavior, it is crucial for entrepreneurs in the agricultural sector to diversify their businesses. Diversification helps mitigate risks, farmers can reduce their dependency on a single crop or market by expanding their range of products and services, ensuring more stable revenue streams and opening opportunities for new market segments. Diversification not only enhances resilience against changes but also aligns with the evolving demands of environmentally conscious consumers, positioning the business for long-term success.

In this way, farmers can increase their income, manage risks, and contribute significantly to rural development. However, the success of these diversification strategies is influenced by various factors, including the characteristics of the farmers, attributes of the farms, economic pressures, and policy support. Understanding these determinants is crucial for policymakers who aim to design effective programs that support agricultural diversification and promote sustainable rural development and it is fundamental that the owner knows if there are available some policy that can support him.

Furthermore, diversification within agriculture often encompasses a range of activities such as agro-tourism, organic farming, renewable energy production, and value-added products. By engaging in these diverse activities, farmers not only enhance their income streams but also contribute to the broader socio-economic development of rural areas. These activities can attract tourism, create jobs, and promote sustainable practices, thereby revitalizing rural communities. (McElwee, G., & Bosworth, G. (2010)

At the same time, the concepts of specialization and diversification can be seen as complementary forces within the agricultural sector. While specialization allows for increased efficiency and expertise in a particular area, it can also lead to increased vulnerability due to reliance on a single income source. Excessive focus on specialization can significantly heighten the risk of enterprise failure, particularly in the face of market fluctuations or adverse environmental conditions. (Van der Ploeg, J. D., & Roep, D. (2003). Multifunctionality and rural development: the actual situation in Europe.)

Conversely, diversification spreads risk across multiple activities, providing a buffer against market volatility and external shocks. However, it's important to recognize that diversification is not without its challenges. Rash decisions or inconsistent actions in the diversification

process can lead to substantial risks and potential failures. Effective diversification requires careful planning, market research, and a clear understanding of both the opportunities and risks involved.

Considering these complexities, the role of policymakers becomes even more critical. They must provide the necessary support and resources to help farmers navigate the intricacies of diversification. This includes financial incentives, technical assistance, training programs, and access to markets. By doing so, policymakers can foster an environment where diversification thrives, leading to resilient agricultural systems and vibrant rural economies. Ultimately, the goal of agricultural diversification extends beyond mere economic benefits. It encompasses environmental sustainability, social inclusion, and the overall well-being of rural communities. By embracing diversification, farmers can contribute to a more sustainable and resilient agricultural sector that is better equipped to meet the challenges of the future.

The agricultural market is undergoing substantial transformations driven by policy shifts, economic pressures, and changing consumer preferences. The diversification of farm activities has emerged as a vital strategy for farmers to stabilize and increase their income, reduce risks, and adapt to external socio-economic changes. This approach is particularly emphasized within the European Union's Common Agricultural Policy (CAP), which now prioritizes multifunctionality and sustainability.

Established in 1962, the CAP represents a crucial agreement between agriculture and society, and between Europe and its farmers. Its primary objectives are to support farmers, enhance agricultural productivity, ensure a stable supply of affordable food, and secure reasonable living standards for EU farmers. Additionally, it promotes sustainable resource management and preserves rural areas and landscapes in the EU.

The CAP supports farmers through various measures, such as providing income support via direct payments to stabilize incomes, rewarding environmentally friendly farming practices, and provisioning public goods not typically paid for by markets, like landscape maintenance. It also adopts market measures to manage difficult situations like sudden drops in demand due to health scares or price drops from temporary oversupply. Furthermore, it implements rural development measures through national and regional programs tailored to the specific needs and challenges of rural areas.

Moreover, the CAP aims to modernize farms, promote innovation, improve competitiveness, protect the environment, and strengthen rural communities. This policy is co-financed by Member States, who also contribute with national measures. The CAP was reformed in 2020 and 2023, introducing additional rules such as contributions to the environment and climate change, targeted support for small farms, and greater flexibility for Member States to adapt measures to local conditions.

In this context, the diversification of farm activities, promoted by the CAP, is crucial for addressing current and future challenges, ensuring sustainability, and enhancing the multifunctionality of agricultural activities within the EU.

Meraner, M., Heijman, W., Kuhlman, T., & Finger, R. (2015) observe that the European Common Agricultural Policy has shifted its focus towards "green box" measures, including

agri-environmental supports, to promote agriculture's multifunctionality. This policy change encourages both on-farm and off-farm activities, aimed at increasing farm household income and maintaining agricultural support within the EU. Diversification, in this context, is seen as a way to internalize externalities and mitigate market risks.

1.2 Types of Diversification Activities

Diversification can be categorized into various types: as we can see in the figure 1. These activities not only expand the range of products and services offered by farms but also integrate agricultural income with other revenue streams. (Van der Ploeg, J. D., & Roep, D. (2003))

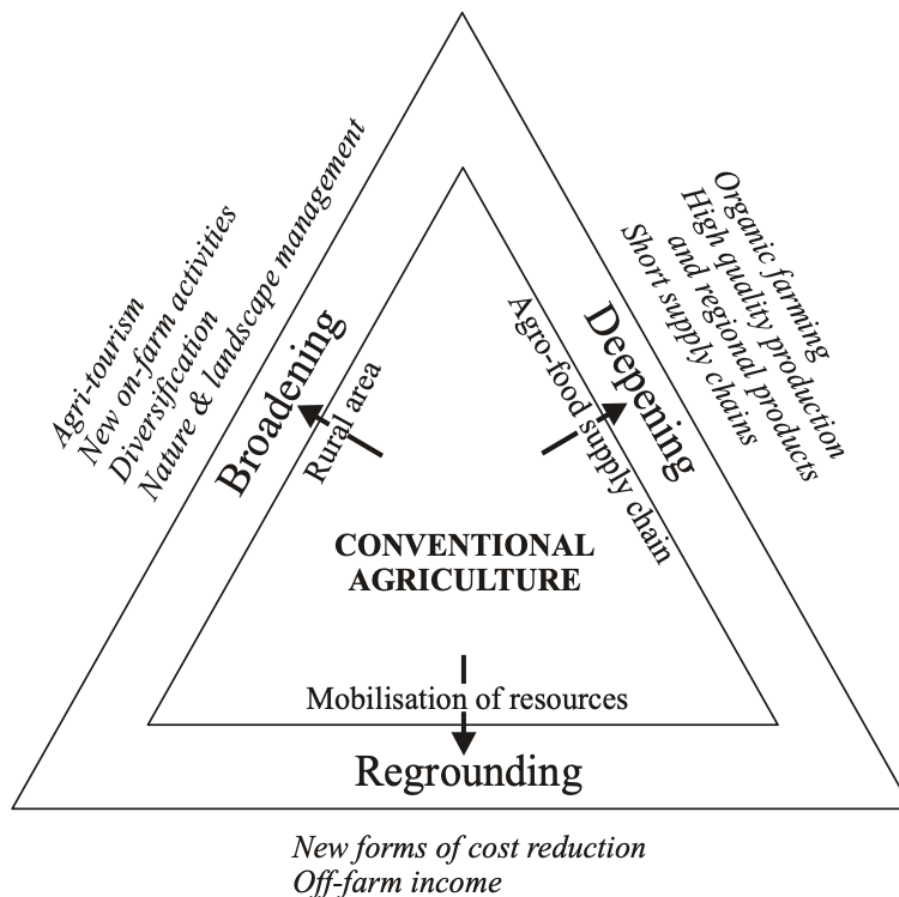


Figure 1: Type of diversification (Van der Ploeg, J. D., & Roep, D. (2003))

-Deepening:

In rural development refers to the enhancement and transformation of traditional agricultural activities to add more value per unit of production, in this case the diversification is along the supply chain. This involves expanding agricultural practices to include organic farming, producing high-quality products, and creating new, shorter supply chains between producers and consumers. These transformations align agricultural production with societal demands,

resulting in products that meet higher standards in terms of quality and added value and can reach specific niche of markets ((Van der Ploeg and Dirk Roep, 2003). An example could be If a farm producer of wheat starts to increase its production making bread, biscuits, a prepared formula for making cake etc.

-Re-grounding:

The concept of "re-grounding" refers to reorganizing and utilizing new resources within a farm enterprise. This process involves grounding the farm in a new set of resources or engaging in new patterns of resource use. Two specific fields of activity illustrate this concept: pluri-activity and farming economically. Pluri-activity means that the farm enterprise is partially supported by off-farm income, allowing the maintenance of farms that would otherwise disappear. This reduces dependence on trends and fluctuations in the major commodity markets, transforming what was once seen as a sign of poverty into a deliberate and preferred strategy. Farming economically involves reducing the purchase of external inputs and loans while simultaneously increasing the efficiency of using available internal inputs, such as grassland and manure. This approach leads to more sustainable agriculture and improves farm income at the same production level. (Van der Ploeg and Dirk Roep,2003)

-Broadening:

Broadening encompasses the expansion of farm activities beyond traditional agricultural production. This process involves incorporating diverse on-farm activities such as agritourism, nature and landscape management, and other services like on-farm care activities. By diversifying income sources, broadening helps stabilize farm incomes and provides services that society values and is willing to pay for. These activities not only generate additional revenue streams but also contribute to the maintenance and enhancement of rural landscapes and community well-being (Van der Ploeg and Dirk Roep, 2003). Some examples of how a winery can do this are: guided tastings, dinner on the vineyards, visit of the winery.

Collectively, deepening, broadening, and re-grounding transform the farm into a multifunctional enterprise that delivers a wider array of products and services (Van der Ploeg and Dirk Roep, 2003). These processes involve innovative shifts in boundaries, expanding the farm into a more complex rural enterprise producing new products and services (Ventura and Milone, 2004). The farm is restructured into a multi-product firm (Scherer, 1975; Saccomandi, 1998), engaging in a diverse range of markets, both global and local. These markets vary from agricultural commodities to tourism, services, labor, and energy. Consequently, total income is increased, promoting continuity. Thus, at both the farm enterprise level and the broader rural economy level, deepening, broadening, and re-grounding act as strategic responses to the previously discussed income squeeze, both independently and collectively.

1.3 The factor for the diversification

Several factors influence a farmer's decision to diversify. Key determinants include:

-Farmer or winemaker Characteristics: Education level, age, and entrepreneurial skills significantly impact diversification decisions. Younger farmers with higher education and non-agricultural work experience are more likely to diversify. (Boncinelli, F., Bartolini, F., & Casini, L. 2018)

Higher education give to farmers and winemakers a broader range of skills and knowledge, making them more capable of understanding and capitalizing on new market opportunities and emerging technologies. Education provides access to essential information and resources for diversification, such as training courses, workshops, and professional networks. Educated farmers are generally more conscious of what a company need and if its time to diversificate and how, as well as the availability of funding and governmental support. If the farmer has sons who works in the winery they are often more inclined to adopt new techniques and practices compared to their older counterparts, this tendency leads to change and innovation. Additionally, younger farmers have a longer time horizon to witness the benefits of investments in diversification. According to De Rosa, M., McElwee, G., & Smith, R. (2019) they are more willing to take risks and invest in new activities that may not yield immediate returns but could be highly profitable in the long run. Lastly, entrepreneurial skills, often developed through non-agricultural work experience, are critical. Farmers with an entrepreneurial background are more likely to diversify their activities, exploring sectors like agritourism, renewable energy production, or the processing and direct sale of agricultural products. Because of their experience outside the agricultural sector they acquire valuable business skills, such as business management, marketing, financial management, and the ability to identify and exploit new market opportunities. These entrepreneurial skills enhance their capacity to adapt to market changes and innovate

-Farm or winery Characteristics: In the study conducted by Meraner, M., Heijman, W., Kuhlman, T., & Finger, R. (2015) the characteristics like the Farm size, production specialization, and geographic location play crucial roles. Larger farms and those located in regions with supportive infrastructure and market access are more likely to diversify. Firstly, the size of the farm or winery is a crucial determinant; in fact, larger wineries have more resources at their disposal, including financial capital, labor, and land. These resources provide greater flexibility and capacity to experiment with new activities and investments. Larger operations can better absorb the risks associated with diversification, as they typically have more robust financial buffers and access to credit. On the other hand, production specialization impacts diversification decisions. Farms and wineries with a narrow focus on a single product or a limited range of products might find it more challenging to diversify due to the deep investment in specific equipment, expertise, and marketing channels. Instead, those with a lower production base are often better positioned to diversify. They can leverage existing infrastructure and knowledge to branch out into related areas, reducing the costs and risks associated with diversification. Geographic location plays a fundamental role in shaping diversification opportunities. Farms and wineries situated in regions with supportive infrastructure, such as good transportation networks, access to markets, and availability of services, are more able to diversify. These areas offer better market access and logistical support, which are critical for the successful introduction of new products and services. Additionally, being in areas with a strong agricultural or viticultural tradition can provide a supportive community and network, further facilitating diversification efforts.

-Economic Pressures: Market variability in yields and prices, along with decreasing consumer spending on food, drives the need for additional income sources. Market variability in yields and prices is a critical factor and in agriculture the production is most of the times uncertain, with yields often fluctuating due to factors such as weather conditions, pests, and diseases. This variability can lead to unpredictable income, making it

difficult for farmers and winemakers to plan and invest in diversification. Furthermore, prices for agricultural products can be highly volatile, influenced by market demand, global trade policies, and competition. This price volatility adds another layer of financial risk, as farmers and winemakers cannot always predict the revenue they will receive for their products. As consumers allocate a smaller portion of their income to food, the agricultural sector faces tighter margins and increased competition. This trend forces farmers and winemakers to seek alternative ways to maintain their income levels. The decreasing consumer spending on food means that producers need to be more efficient and innovative to capture and retain market share.

Indeed Brandth, B., & Haugen, M. S. (2011) sustain that in a recent article in Time Magazine features the agricultural crises in France and stresses the idea that it is agritourism that may save rural France.

In response to these economic pressures, the need for additional income sources becomes apparent. Diversification into new activities such as agritourism, value-added product creation, or renewable energy production provides alternative revenue streams that can help stabilize income. These new income sources can offset the risks associated with market variability and decreasing consumer spending on food, thereby improving the overall economic resilience of farms and wineries.

-Policy Support: Availability of subsidies and support programs, such as those under the Common Agricultural policy incentivize diversification efforts. (De Rosa, M., McElwee, G., & Smith, R. 2019)

Financial incentives provided by these policies help reduce the financial risk associated with diversification. By offering grants, low-interest loans, and other financial aids, these programs make it more possible for farmers and winemakers to invest in new activities. These financial supports can cover initial costs such as purchasing new equipment, upgrading facilities, or implementing new production techniques, thereby lowering the barrier to entry for diversification. Moreover, support programs like the CAP and RDP offer technical assistance and advisory services. These programs often include training and educational resources that equip farmers and winemakers with the knowledge and skills needed to successfully diversify their operations. Workshops, seminars, and access to expert advice help them understand market trends, adopt innovative practices, and navigate regulatory requirements, enhancing their capacity to diversify effectively.

In addition, policy support often includes measures to improve infrastructure and market access. Investments in rural infrastructure, such as improved transportation networks and better access to digital technologies, facilitate the successful introduction and expansion of diversified activities. Enhanced market access allows farmers and winemakers to reach broader customer bases, thereby increasing the potential profitability of their new ventures.

The motivations behind diversification are several:

-Economic Survival and Growth:

Reducing dependency on a single source of revenue is crucial for long-term economic growth. In an unpredictable market environment, having multiple revenue streams can provide the financial flexibility needed to invest in new opportunities and innovations. Diversification allows farmers and winemakers to explore new markets and customer bases, increasing their overall market resilience. This adaptability is essential for responding to changing consumer

preferences, regulatory shifts, and competitive pressures. Moreover, diversification can enhance the overall sustainability and competitiveness of farms and wineries. By engaging in various activities, such as agritourism, direct-to-consumer sales, or renewable energy production, agricultural businesses can create added value and tap into additional revenue sources. These diversified activities not only contribute to economic stability but also foster growth and development, ensuring the long-term viability of the enterprise. As we saw with Winfree, J., McIntosh, C., & Nadreau, T. (2018) the diversification, in this case, wine tourism can significantly influence the demand for traditional wine sales, with high-quality wineries benefiting from a greater presence of wine tourists to promote their product.

-Risk Management:

Diversification helps stabilize farm income and reduce dependency on a single source of revenue. This is crucial in an unpredictable market environment. In fact, Delgado, C. L., & Siamwalla, A. (2018) has demonstrated that African farmers tend to diversify their production activities widely to mitigate risk.

They make this decision for several reasons; first of all diversification stabilizes farm income by spreading financial risk across multiple activities. When a farm or winery relies solely on one product, it is vulnerable to fluctuations in market demand, price volatility, and adverse weather conditions that can impact yields. By diversifying into different products, or services, farmers and winemakers can offset losses in one area with gains in another. This risk management strategy ensures a more consistent income stream, helping to safeguard the business against unexpected downturns.

By engaging in multiple activities, farmers can spread risk and protect against market volatility.

Diversification enables farmers to reduce the impact of adverse events in any single aspect of their operations. For instance, if a farmer's main crop suffers due to unfavorable weather, disease, or pests, additional income from other crops, livestock, or non-agricultural ventures can offset these losses. This approach ensures that the farm's financial stability is not overly reliant on the success of one activity, thereby diminishing its vulnerability to external shocks. Prices for agricultural commodities can vary widely due to shifts in supply and demand, changes in trade policies, and global economic conditions, in this way diversified activities provide a buffer against these price fluctuations. When the price of one commodity falls, revenue from other sources can help maintain the farm's overall income.

Additionally, diversification offers farmers the flexibility to capitalize on various market opportunities and emerging trends; a various range of productions or services allows them to adapt swiftly to changing consumer preferences and market demands. This not only mitigates risk but also opens new avenues for profitability and market growth. For example, integrating agritourism or organic produce into their operations can attract different customer segments.

-Cultural and Social Identity: Diversification allows farmers to maintain and enhance their social identity by integrating traditional farming with new entrepreneurial ventures.

Agritourism, for instance, combines farming with tourism, creating new income streams while preserving cultural heritage.

While diversification offers numerous benefits, it also poses challenges, particularly in terms of identity shifts. Farmers may resist diversification due to a perceived betrayal of their traditional agricultural role. However, studies indicate that diversification can lead to more

complex identities, with farmers seeing themselves as both traditional agriculturists and modern entrepreneurs. Moreover, gender roles also influence diversification, with women often more open to adopting new activities that combine traditional and modern practices. As farms transform into multi-product enterprises, farmers' identities evolve, reflecting a blend of agricultural heritage and contemporary entrepreneurship.

2.0 Wine tourism as a diversification strategy

Wine tourism, or enotourism, is a type of thematic tourism that focuses on wine and its production. It can be simply defined as "the visit to vineyards, wineries, wine festivals, and wine-related events where wine tasting and/or experiencing the attributes of a wine region are the main motivating factors for visitors" (Hall, Sharples, 2004). This phenomenon started in Italy about twenty-five years ago, thanks to the promotional efforts of associations like "Città del Vino", which has been organizing cooperation among Italian cities involved in this type of tourism since 1987, and the "Movimento del Turismo del Vino", a non-profit organization since 1993 with over 800 wineries selected for their quality wine tourism experiences. These two associations initiated well-known events such as "Cantine Aperte", "Calici sotto le stelle", and "Benvenuta Vendemmia", which have become symbols of opportunities for the wine sector. These events, along with private initiatives, have allowed people to visit wineries, build relationships with producers, taste quality wines, and gain an authentic and personal experience of this product. Eno tourism is a clear diversification strategy for the winery.

2.1 What is eno tourism?

Roberta Garibaldi, an expert in this sector, defines in her websites eno tourism as an important branch of food and wine tourism, which includes all activities aimed at understanding and promoting wine directly in the places of production. This practice includes visits to vineyards, cellars and museums dedicated to vine growing tools and techniques. A fundamental aspect of eno tourism is the tasting and marketing of the company's wine production, often accompanied by local food products, which contribute to a complete and integrated sensory experience.

Wine tourism activities can be defined simply as "visits to vineyards, wineries, festivals and wine events for which wine tasting and/or experiencing the attributes of a wine region are the main motivating factors for visitors" (Hall, Sharples, 2004)

These activities include guided tours of the company vineyards and cellars, during which the various phases of viticulture and winemaking are illustrated. Additionally, displays of historic instruments offer an in-depth perspective on the history and evolution of viticultural and winemaking practices.

Another category of wine tourism activities is made up of educational, cultural and recreational initiatives, which can include events such as educational sales, sensory workshops and thematic itineraries within the cellars and vineyards. These events not only provide practical education to participants, but also help strengthen the bond between the territory and its visitors, promoting a more aware and participatory wine culture.

The tasting of the company's wines, often accompanied by local agri-food products prepared on site, represents a further key element of wine tourism. The tasting is not only an opportunity to appreciate the organoleptic characteristics of the wines, but also a moment of cultural dissemination, in which the peculiarities of the vines, the winemaking techniques and the influence of the terroir are explained.

It is an opportunity for the promotion of wine heritage, combining educational, cultural and sensorial aspects. This multidisciplinary approach not only enriches the tourist experience, but also contributes to the valorization and sustainability of local productions, promoting the economic and cultural development of wine-growing areas. In fact, it is a central element of gastronomic tourism and a driving force in diversification strategies for many destinations. It is now firmly established in the overall Italian tourism offering. The 2020 Wine Tourism Report in Italy, published by the National Association "Città del Vino", highlighted a 7% increase in total visitors in 2019, from 14 million in 2018 to 15 million, including day trips and overnight stays. Additionally, the revenue grew by 6%, from 2.5 billion euros in 2018 to 2.65 billion euros. (R. Garibaldi)

Nowadays our country boasts wine productions of exceptional quality, renowned both nationally and internationally. It has a territory highly suited for winemaking, whose cultural value has been recognized by UNESCO. The "Vineyard Landscapes of Piedmont: Langhe-Roero and Monferrato" and the "Prosecco Hills of Conegliano and Valdobbiadene" have been awarded the prestigious designation of World Heritage Sites.

From a tourism perspective, this heritage is highly attractive to both Italian and international tourists, adding value to businesses and stimulating the economic and social growth of the regions involved. According to the "2023 Report on Wine and Food Tourism," more than 3 out of 10 Italians visited at least one winery during their most recent travels and participated in a wine event or festival. Wine tastings and tours were the most booked food and wine-themed experiences on Tripadvisor in 2022, by both domestic and international travelers, especially those from overseas (Americans and Canadians). Tuscany was the most booked destination (nearly 6 out of 10 wine tourism bookings were for this region), followed by Veneto.

Actually, the discovery and tasting of local wine productions remain central, but they are no longer the only elements sought by tourists. The cultural value of wine, represented by a unique mix of product, terroir, and people, fascinates, and attracts more and more visitors.

Today, wine tourism is seen as an opportunity for cultural enrichment, a way to connect with the identity, traditions, and enological culture of the visited area. But it is not only that, it is also seen as a way to stay in the nature and away from the chaos of the city. Tourists often choose not only the more renowned companies but also small family-run businesses and production sites that combine wine with art, music, design, and history.

In addition to the cultural aspect, there is also a focus on well-being. Tourists want to find opportunities in wineries and surrounding areas—such as courses, workshops, and treatments—to rejuvenate, reset their habits, and adopt a healthier lifestyle. This includes wellness activities (massages, hydrotherapy, and spas) in the vineyards. The desire to enjoy open spaces, closely linked to the pursuit of well-being, translates into wine trekking, bike tours, and e-bike tours to explore wineries and other local attractions. Moreover in the tourism report on food wine and sustainability by Roberta Garibaldi it is clear that the food and wine tourism experience becomes an opportunity to acquire healthier habits: it can improve nutritional awareness and, through edutainment, provide guidance to improve one's habits. 7 out of 10 tourists would like to find menus with recipes that are good for their health on holiday. It offers opportunities to rediscover psycho-physical well-being, combining the discovery of local food and wine with light sports activities.

Lastly, but no less important, is sustainability, which has become an increasingly significant driver of choice. Travelers seek experiences characterized by a green approach and social responsibility. This latter aspect of sustainability, often less emphasized, is particularly appreciated and includes the desire to engage in close-contact experiences with producers, such as participating in the harvest.

These figures indicate that 2019 was a record year for wine tourism performance, with significant growth potential due to Italy's economic, social, and cultural heritage. Given these positive results, wine tourism is no longer a secondary activity for winemakers but an essential part of their business that requires careful planning and organization. This sector represents both direct and indirect income, contributing to on-site sales and long-term projects for building a brand and creating customer relationships. Today, wine tourism symbolizes an important alliance for the growth of territories and their unique features, integrating wine resources with other strategic sectors like oenology, gastronomy, and other related tourism forms.

Wine tourism is simultaneously a form of consumer behavior, a strategy for destinations to develop and market wine-related attractions and images, and a marketing opportunity for wineries to educate and sell their products directly to consumers (Getz & Brown, 2006). The growth of wine tourism confirms the potential of Italy's natural and cultural heritage, which is still underutilized. Italy lags other countries in terms of infrastructure quality, personnel training, and promotion. Many municipalities lack a local Tourist Office, and those that do often fail to adequately assess wine tourism presence (National Association Città del Vino, 2019).

Moreover, there is a lack of territorial aggregation, hindering essential synergies for sustainable development. To address these issues and provide tools and solutions for the wine tourism sector, the decree regulating wine tourism activities, titled "Guidelines and directions regarding the minimum quality requirements and standards for the exercise of wine tourism activity," was signed on March 12, 2019. This decree marks a significant step forward in regulating a sector with immense potential, emphasizing the need for greater focus on hospitality and the broader concept of welcoming visitors. Wineries and regions could become receptive sites of Wine Hospitality, offering authentic experiences that are the cornerstone of territorial marketing. Wine tourism, before being about "wine," is fundamentally about tourism, where the service concept is crucial.

2.2 The law behind the wine tourism

According to the decree, "all educational and informative activities aimed at promoting local wine production and wine knowledge, with particular emphasis on geographical indications (DOP, IGP), are considered wine tourism activities" (Article 1 of the "Guidelines and directions regarding the minimum quality requirements and standards for the exercise of wine tourism activity," approved by the State-Regions Conference on March 12, 2019). This long-awaited provision supports the substantial potential of the Italian wine tourism sector, which has operated for years without specific regulation. The decree officially recognizes wine tourism, linking it to the activities allowed for agricultural entrepreneurs by Article 2135 of the Civil Code and the 2016 Law 238 "Organic discipline of vine cultivation, wine production, and commerce," known as the "Consolidated Wine Law," which acknowledged the cultural significance of wine and its territories.

The decree specifically identifies wine tourism activities as guided tours of the vineyards and wineries, visits to exhibitions of viticultural tools, educational, cultural, and recreational initiatives within wineries and vineyards (including educational harvests, wine tasting, and the commercialization of the winery's products, often paired with food prepared by the winery itself) (DM "Guidelines and directions regarding the minimum quality requirements and standards for the exercise of wine tourism activity," 2019). Article 2 of the decree outlines the hygienic-sanitary requirements and standard guidelines to regulate these activities, emphasizing the importance of an online presence and practical technical training for staff.

The Guidelines also establish general requirements, including hygiene, sanitation, and safety standards, as well as standard guidelines for operators engaged in wine tourism activities (Art. 2). These can be summarized as follows:

- Weekly or even seasonal opening for a minimum of 3 days, including Sundays, pre-holiday, and holiday days;
- Use of booking tools for visits, preferably electronic;
- Posting a sign at the entrance of the winery with information related to wine tourism services, including opening hours, types of services offered, and languages spoken;
- Provision of a company website or webpage and informational material about the winery and its products printed in at least three languages, including Italian;
- Indication of parking availability on the premises or nearby;
- Distribution of informational material about the production area, typical and local products, particularly those with denomination of origin, as well as tourist, artistic, architectural, and scenic attractions in the area where the wine tourism activity is conducted;
- Creation or provision of dedicated and adequately equipped spaces for welcoming visitors and for the types of activities conducted by the wine tourism operator;
- Presence of staff with competence and training, including the company owner or assisting family members, employees of the company, and external collaborators;
- Conducting wine tasting activities within the cellars using glass goblets or other materials that do not alter the organoleptic properties of the product;

- Conducting tasting and marketing activities with staff possessing adequate skills and training, including the company owner or assisting family members, employees of the company, and external collaborators.

In essence, the decree serves as a solid support framework with instructions to regulate the relationship between territory, agricultural product, and tourism, enhancing the untapped potential of this sector. Wine has consistently been a part of Italian life, maintaining its socio-economic and cultural importance despite changes in lifestyles and trends. Recently, Eno gastronomic products have diversified the tourism offerings of regions, representing both the expression of traditions and a driving force for tourism.

Wine is the central element of this tourism flow, creating connections between excursions, gastronomy, and leisure activities in typical origin areas. From this perspective, wine tourism can also be a cultural experience, where the main motivation might not solely be the Eno gastronomic product, but it complements other types of tourism and activities offered by the territory, enriching the destination's appeal.

2.3 The wine sector in Veneto

The viticulture sector in Veneto plays a crucial role both economically and culturally. The 2022 harvest yielded over 15 million quintals of grapes (15,041,859), with a significant proportion classified as DOC (72.05%), DOCG (10.54%), and IGT (14.52%). This highlights the high level of specialization achieved by Veneto's wine producers. (Venetoagricoltura.org (2022)) This resulted in a 7.44% increase in grape harvest compared to 2021. Consequently, wine production also rose, reaching 12.6 million hectoliters, thereby reaffirming Veneto as the leading wine-producing region in Italy, ahead of Puglia, Emilia-Romagna, and Sicily.

Veneto boasts over 100,000 hectares of vineyard area (101,165 hectares), with the provinces of Treviso and Verona being the primary viticultural hubs. Treviso, with 43,417 hectares, predominantly cultivates white grapes, especially Glera, the grape variety used in the production of Prosecco PDO. Verona, with 30,289 hectares, is renowned for its celebrated wines such as Amarone and Valpolicella. Region-wide, black grapes constitute only 26% of the total grape production. (ISMEA (2024))

The most widespread grape variety is Glera, covering 36,713 hectares, followed by Pinot Grigio, Garganega, Corvina, Merlot, and Chardonnay. Veneto is home to 27,513 active viticulture businesses, with an average vineyard size of 3.6 hectares per enterprise.

On the export front, Veneto remains the top wine-exporting region in Italy, holding a 36% share of the national total. By the third quarter of 2022, Veneto's wine exports generated approximately 2.08 billion euros, marking a 16.6% increase compared to the previous year. This impressive growth is noteworthy considering the broader context of rising average prices, even though the volume of exports to key markets such as the United States and Germany experienced slight declines. (Venetoagricoltura.org (2022))

Treviso and Verona are the cornerstones of Veneto's viticulture landscape. Treviso's vineyards are predominantly white grape varieties, with Glera making up a substantial portion, reflecting the region's focus on Prosecco production. Verona, on the other hand, offers a more diverse array of grape varieties and is particularly famous for its red wines like Amarone and Valpolicella. This diversity within the region contributes significantly to its reputation and economic strength.

Additionally, Veneto's viticulture sector is characterized by its significant export activity. Despite the slight decreases in volume to certain markets, the overall export value has increased due to higher prices. This resilience in the face of economic and environmental challenges underscores the sector's robust health and adaptive capabilities. Veneto's commitment to maintaining and enhancing its viticulture sector is evident through various regional initiatives. The ongoing battle against issues such as flavescence dorée and drought conditions has prompted the implementation of support measures, not only financial but also technical and educational, to aid producers.

The annual Trittico Vitivinicolo Veneto event, held in three phases throughout the year, exemplifies the proactive approach of the region. This event, which includes a health status review of the vineyards in June, harvest forecasts in August, and a harvest summary in December, provides a comprehensive overview of the sector's status and prospects. The viticulture sector in Veneto is a vital component of the region's economy and cultural heritage. The sector's resilience and adaptability, combined with strategic regional support, ensure that Veneto remains a leading force in Italy's wine production landscape. The region's ability to overcome challenges and leverage its strengths positions it well for continued success in both domestic and international markets.

2.4 The valpolicella area

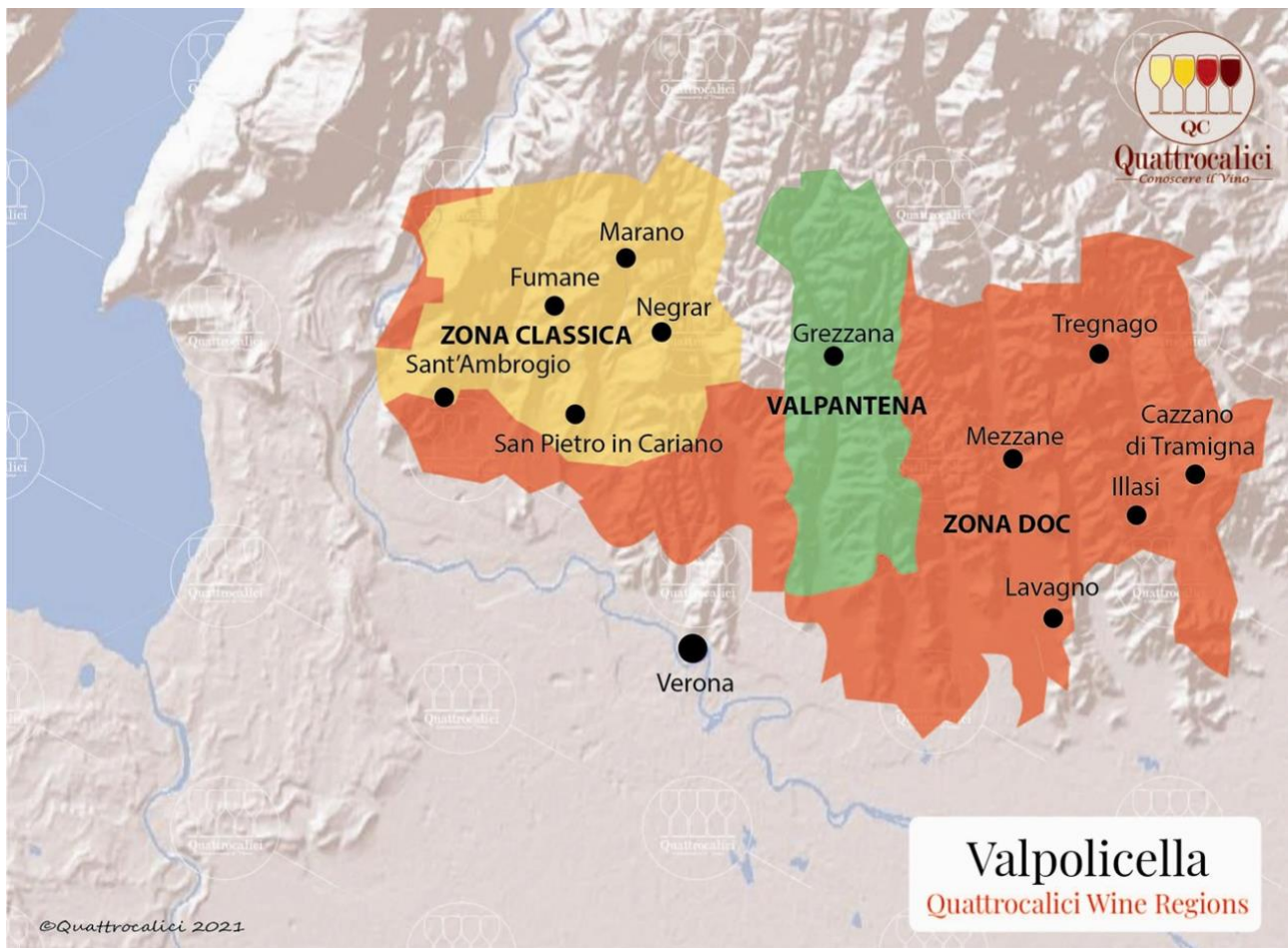


Figure 2: Map of the Valpolicella area (web source: Quattrocalici)

Valpolicella (figure 2), located in the Veneto region of northeastern Italy, just north of Verona, is a renowned wine-producing area celebrated for its rich winemaking heritage and ideal viticultural conditions. The region's diverse landscape, extending from the Lessini Mountains to the Adige River plains, features rolling hills and fertile valleys, which create a range of microclimates perfect for grape cultivation.

Valpolicella's topography includes terraced vineyards that benefit from optimal sun exposure and excellent drainage, essential for growing healthy grapevines. The soils in the region are primarily calcareous and marl, with volcanic and basaltic deposits in some areas, contributing to the unique flavor profiles and aromatic complexity of the wines.

The climate in Valpolicella is mild and temperate, with warm summers and cool winters. The proximity to Lake Garda moderates temperature extremes, creating a longer growing season for grapes to develop full flavors and balanced acidity. The cooling breezes from the Lessini Mountains further enhance the vine health by reducing the risk of fungal diseases. Rainfall is evenly distributed throughout the year, with higher precipitation in the hills compared to the plains. Effective vineyard management, including canopy control and selective harvesting, ensures the quality of the grapes despite climatic variability.

The primary grape varieties grown here include Corvina, Rondinella, and Molinara, which form the backbone of most Valpolicella wines. As we can observe in the figure 3 the most widespread varieties is Corvina with the 56%.

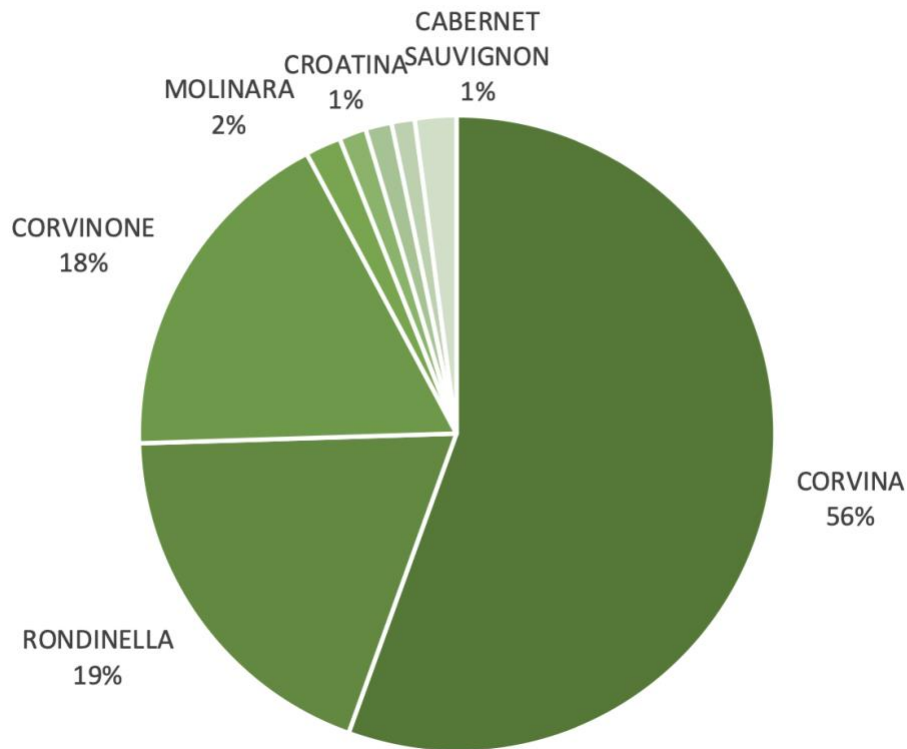


Figure 3: Grape varieties in Valpolicella (

They are grown with the training system called Pergola Veronese (figure 4). It involves growing vines on a horizontal trellis supported by vertical posts. This method spreads the vine canopy horizontally, providing shade and protecting grapes from excessive sun. It enhances air circulation, reduces the risk of fungal diseases, and allows for efficient vineyard management and harvesting.

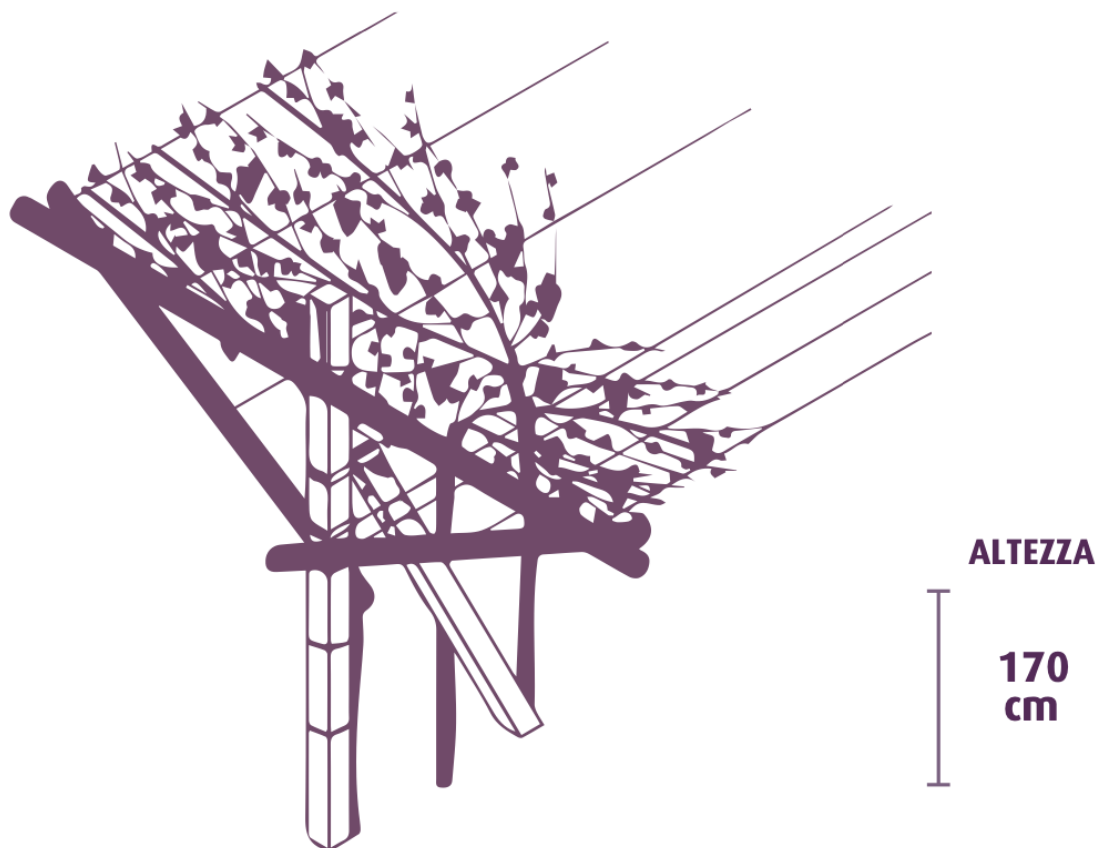


Figure 4: training system (web source: Independent wine)

The wine produced in the area are:

-Valpolicella Classico DOP: This is the most straightforward expression of the region's wines, known for its fresh and fruity character, with flavors of cherry, red berries, and a hint of spice. It is typically light to medium-bodied with a vibrant acidity.

-Valpolicella Superiore DOP: A step up in quality, these wines are aged for at least one year before release. They exhibit more complexity and structure, with deeper fruit flavors, enhanced by notes of dried herbs and a longer finish.

-Ripasso della Valpolicella DOP: Often referred to as a "baby Amarone," Ripasso wines are made by re-fermenting Valpolicella wine on the lees of dried Amarone grapes. This process adds richness, body, and additional layers of flavor, resulting in a wine that combines freshness with depth.

-Amarone della Valpolicella: One of the most prestigious wines from the region, Amarone is made from partially dried grapes, which concentrate the sugars and flavors. The wine is full-bodied, with intense flavors of dried fruit, chocolate, and spice, balanced by a velvety texture and a long, luxurious finish.

-Recioto della Valpolicella: A sweet dessert wine, Recioto is also made from dried grapes. It shares the richness and intensity of Amarone but retains a natural sweetness, making it an ideal pairing for desserts and cheeses.

2.5 Objective of the thesis

The thesis aims to investigate the reasons behind why a winery chooses to diversify its activities into wine tourism. This study involves distributing a questionnaire to the Consortium of Valpolicella Wines, which will then be disseminated to the associated wineries. The primary objective is to analyze the collected data to understand the strategic motivations for this diversification. To develop the questionnaire, a thorough review of the existing literature was conducted to identify and address critical factors influencing wineries' decisions to engage in wine tourism. These factors encompass the characteristics of the owner such as the age, the gender, its educational level, its family situation; the type of the winery such as the size, the economic and geographical attribute. But not only that, the literature focuses also in the geopolitics scenario, for example if there are available some economic benefits by the government or the European Union like the PAC (politica Agricola comune). By examining these elements, the study seeks to provide a comprehensive understanding of the motivations driving wineries in the Valpolicella area to adopt wine tourism as a complementary business strategy.

3.0 Methodology

3.1 Survey

To start this study, it was essential to think a structured approach for questionnaire administration to the Consortium dei Vini della Valpolicella, through which it could be disseminated among the associated wineries. This process commenced with an exhaustive literature review conducted via online platforms such as Scopus and Google Scholar, with the specific objective of identifying scientific articles pertaining to corporate diversification within the agricultural sector. Delving into a lot of academic resources, a deep search was undertaken to unearth relevant insights and perspectives. Following this initial phase, a comprehensive analysis was undertaken to distill and synthesize the findings, thereby illuminating the most salient points encapsulated within the literature.

Upon distillation, the extracted key points were cataloged into an Excel spreadsheet, facilitating systematic organization and management of the vast array of information. This categorization process was undertaken with attention to understand the meaning of the article, ensuring that each key point was accurately captured and appropriately classified. Through this meticulous organization, the insights gleaned from the literature were effectively structured into coherent categories, laying the foundation for subsequent analysis and interpretation.

The categorized key points served as the cornerstone for the development of the questionnaire, providing valuable insights that informed the design of relevant inquiry. Each category within the Excel were necessary for doing pertinent questions and that could be derived to responses from the participants. Thus, the systematic classification of key points facilitated the transition from literature review to questionnaire development, ensuring that the inquiry was grounded in a robust theoretical framework.

After that the key points has been classified, they were divided into the following categories:

- Country of the study
- Main activity of the diversification activity studied
- The most relevant factors that is what can influence, according to the study, the adoption of diversification practices
- Direction of the effect of the different factors (e.g. more inclined young people, high level of education...)
- Reason provided by the study why these effects are observed

Moreover, we consulted several surveys to understand how to properly organize the questionnaire. To gain an accurate perspective on the situation, the questionnaire included 22 questions, most of which were multiple-choice or used a degree of agreement scale. The completion time for the survey was kept under 5 minutes to maintain a consistent level of user attention. It has been proven that excessively long surveys lead respondents to lose interest after a certain number of questions, which in turn decreases their reliability as they may skip questions or provide random responses.

The questionnaire was structured in a detailed manner. In the first section, we collected information about the owner of the winery. This included demographic details such as age, gender, and whether they had children. Gathering this information was essential to understand the background of the respondents and to analyze any patterns or correlations based on these variables.

The second section of the questionnaire focused on the structure of the agricultural enterprise. Here, we inquired about various aspects of the winery's operations, such as the size of the vineyard, its location, and other pertinent characteristics. This section was crucial to comprehend the operational scope and geographical distribution of the wineries participating in the survey.

In the final section, respondents were asked to express their level of agreement with a series of statements regarding enotourism. This part was designed to gauge the attitudes and perceptions of winery owners towards the tourism aspect of their business. Understanding their views on enotourism could provide valuable insights into the potential for growth and the challenges faced by the industry.

Additionally, to obtain key information about the wineries, such as their names and addresses, we included some open-ended questions. These questions allowed for more detailed responses, providing a richer context to the survey data.

By carefully structuring the questionnaire in this manner, we aimed to ensure that it was comprehensive yet concise, allowing us to gather meaningful and reliable data without overburdening the respondents.

For data collection in this research, I found that administering the questionnaire to companies via Google Forms was the most effective method. This approach offered numerous advantages that significantly facilitated the research process.

Firstly, Google Forms is highly accessible and user-friendly. It can be accessed from any device with an internet connection, allowing respondents to complete the questionnaire at their convenience without needing to install additional software or use specific devices. This accessibility likely increased response rates as participants could easily engage with the survey. Secondly, using Google Forms proved to be time-efficient, the creation and distribution of the questionnaire were straightforward and quick, allowing for extensive customization and flexibility in question types, including multiple-choice, checkboxes, rating scales, and open-ended responses. This flexibility enabled me to design a questionnaire tailored to the specific needs of my research. Within a few steps, I was able to design the form, customize it with specific questions, and distribute it via email. This rapid deployment was considerably faster than traditional methods, enabling swift data collection.

Another significant advantage was the streamlined data collection and analysis process. Responses were automatically saved in a spreadsheet, providing an organized and immediate overview of the collected data. This method of survey also offers built-in preliminary analysis features, such as summary charts and graphs, which provided a quick understanding of the results.

Cost-effectiveness was another major benefit. Google Forms is entirely free to use, unlike other survey tools that may require licensing fees or subscriptions.

After a couple of weeks about 17 companies answered to the survey. All the result has been automatically registered in a spreadsheet; in this way I was able to get the graphs for each question in the questionnaire. In the survey, one focus was finding the information of the winery such as how many hectares of property , what consists the main activity, the age of the owner, the gender and other information about its family and winery. The second part is focused on finding information about the market situation of the winery, and on the wine tourism part.

4.0 Data

4.1 Area of the survey

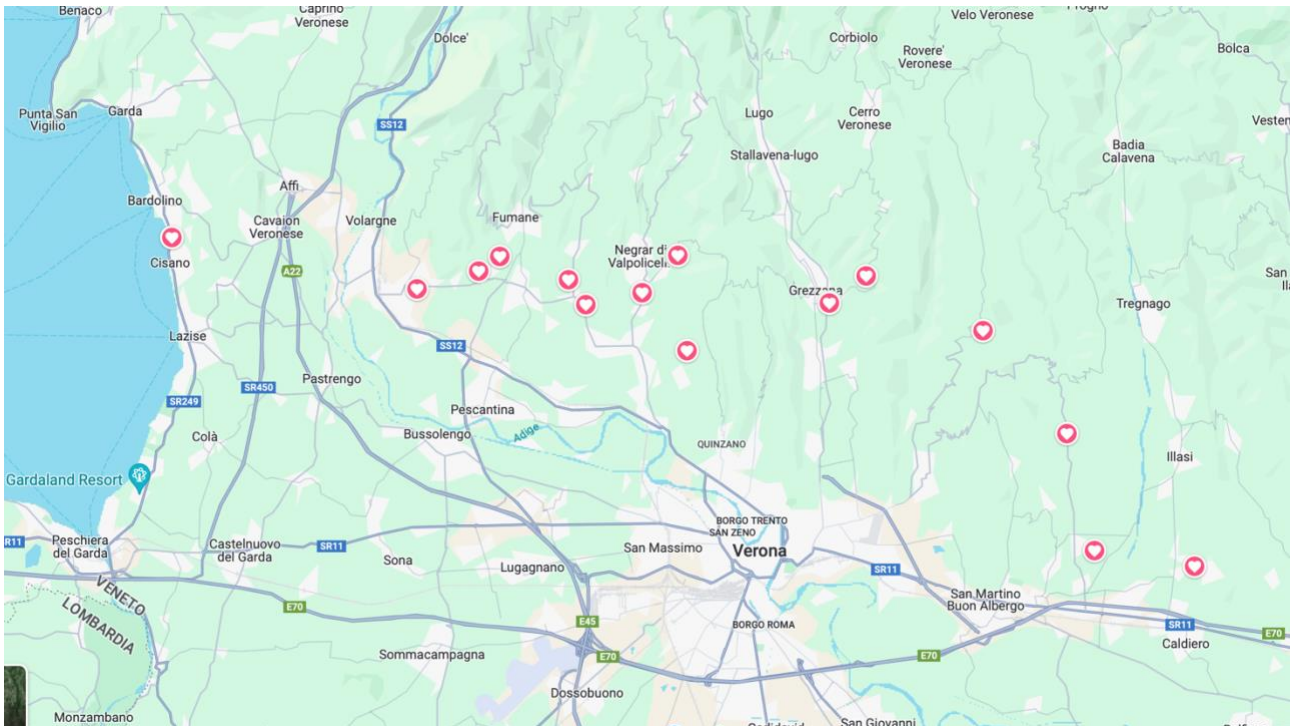


Figure 5: Map of the wineries of the survey (Google maps)

Note: The figure does not show the exact location of the wineries but provides an indicative positioning only.

This map (figure 5) illustrates the municipalities of wineries that participated in thesis survey. The map focuses on the region around Verona, a city in northern Italy renowned for its wine production.

The highlighted wineries are primarily situated to the north and east of Verona. A significant concentration is visible in the Valpolicella area, which includes towns such as Negrar di Valpolicella, Fumane, and Marano di Valpolicella. This region is famous for producing high-quality red wines, including Amarone and Valpolicella. Moving southeast of Verona, the markers indicate wineries around the towns of Illasi and Tregnago. These areas are part of the Soave wine region, known for its white wines. Additionally, the map shows a few wineries to the west of Verona, near Lake Garda. Towns like Bardolino and Cisano are included, known for producing light and fruity red wines, particularly Bardolino.

Overall, the map encompasses a diverse range of wine-producing areas around Verona, highlighting the widespread participation of wineries from these key regions in survey.

4.2 Vineyard surface

The dataset collected from the survey comprises information about the types of land tenure of the farms.

The total number of responses is 17 where 14 wineries reported having zero hectares of rented vineyard area, indicating a strong preference for ownership over leasing. Only 3 wineries reported having any leased vineyard area, with values ranging from 1 to 12 hectares.

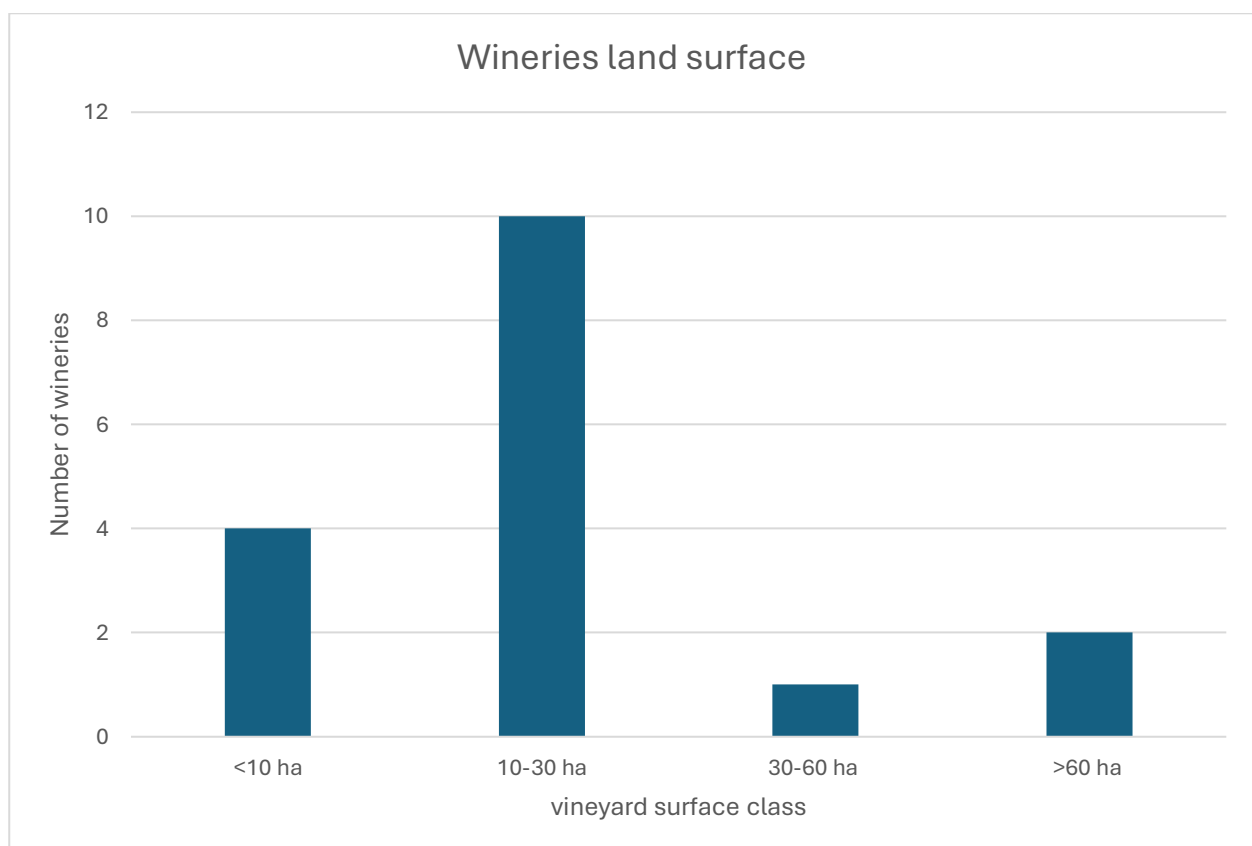


Figure 6: land surface graph (author's elaboration)

On average, the owned vineyard area is approximately 22.35 hectares. This average reflects a broad range of ownership sizes, from as small as 2 hectares to as large as 120 hectares. However, excluding the winery with 120 hectares of property which is an exception, as we can see in the figure 6 the average size of property is 30 hectares.

This high variation suggests a diverse set of wineries in terms of their vineyard size. This wide range indicates that the survey included wineries of various capacities and scales, from small, boutique operations to larger, possibly industrial-scale vineyards.

The average leased vineyard area among the wineries that do lease land is approximately 0.88 hectares. Given that most respondents lease no vineyard area at all, this low average further underscores the preference for owning vineyard land.

A significant observation from the data is the lack of a direct correlation between the size of owned and leased vineyard areas. For instance, a winery with 17 hectares of owned land leases an additional 12 hectares, while another with 15 hectares of owned land leases only 2 hectares. This indicates that leasing decisions are likely influenced by factors other than just the size of the owned vineyard area that might be financial strategies, availability of land for lease.

From the comparison with ISTAT data, it is notable that the proportion of rented land compared to owned land is relatively similar with a slight tendency towards the ownership. However, our survey results reveal a different trend: a higher prevalence of owned land compared to rented land. This discrepancy suggests that while the ISTAT data indicates a balanced distribution between the two types of land tenure, our observations from the questionnaire show a stronger preference for land ownership in the surveyed area.

According to ISTAT, the average farm size, including both utilized and non-utilized agricultural land, is approximately 5.01 hectares across 418 farms. In contrast, the average farm size in our sample is significantly larger, at 25.35 hectares, with a standard deviation of 28.35 hectares. To assess the statistical significance of this difference, a one-sample t-test was conducted, yielding a t-value of 2.96 and a p-value of 0.009. This p-value indicates that the difference between the two means is statistically significant at the 1% level, suggesting that the disparity observed is unlikely to be due to random chance and may reflect a real difference between our sample and the broader population represented by ISTAT.

4.3 Number of employees with permanent contracts in the winery

Wineries with No Permanent Workers: There are 3 wineries that do not employ any permanent workers. This could indicate smaller operations or a reliance on seasonal or temporary labor.

Wineries with 2 Permanent Workers: Another 3 wineries employ 2 permanent workers each. This suggests a minimal, yet stable workforce likely involved in essential operations and it also means that the workers are multi-specialized maybe working in the winery and also in the vineyards when needed.

Small Wineries (3-5 Permanent Workers)

This category includes wineries with a number of permanent workers ranging from 3 to 5. One winery has 3 workers, while two wineries have 4 workers and another two wineries have 5 workers. This suggests that these operations, although small, have a workforce sufficient to manage moderate production and diverse tasks.

Medium-Sized Wineries (6-8 Permanent Workers)

Wineries with a number of permanent workers ranging from 6 to 8 fall into this category. One winery employs 6 workers and two wineries employ 8 workers. This indicates slightly larger operations that may require a more robust workforce to handle more complex or larger-scale production processes.

Large Wineries (10-12 Permanent Workers)

This category includes wineries with a number of permanent workers ranging from 10 to 12. Each of the three wineries in this category employs 10, 11, and 12 workers, respectively. These wineries likely have more extensive operations, necessitating a larger permanent staff to maintain consistent productivity and quality.

Large-Scale Winery (110 Permanent Workers)

One winery stands out with a significantly higher number of permanent employees, 110. This indicates a large-scale operation, likely with extensive production, distribution, and administrative needs.

The data showcases a diverse range of workforce sizes across different wineries. While most wineries operate with a relatively small number of permanent workers, there are instances of medium to large operations requiring a more substantial and consistent workforce. The presence of one winery with 110 permanent employees highlights the scale variance within the industry, from small family-run businesses to large commercial enterprises.



Figure 7: Employers graph (author's elaboration)

4.4 Main activity of the company

It has been asked to the winery to specify in what consist of their main activity: if they only grow the vines and then they sell the grape they figure in Vine growers. On the other hand, if they produce the wine from purchased grapes, they are Wine makers; in the case If they do both, they are vintners.

This data shows that out of the total respondents, four wineries are exclusively engaged in vinegrowing. These wineries focus solely on the cultivation of grapevines, which involves tasks such as planting, pruning, and harvesting grapes, they might sell their grapes to other wineries or cooperatives that handle the winemaking process.

Additionally, twelve wineries manage both vinegrowing and winemaking. These integrated operations handle the entire process from grape cultivation to the final production of wine, allowing them to oversee and control every stage of winemaking. Moreover, only one is also focused in the olive oil production.

This distribution highlights the varied approaches within the industry, with some wineries choosing to specialize in one aspect of the production process while others manage both cultivation and winemaking.

4.5 The age of the owner

Age Range and Diversity

The age ranges from 30 to 70 years old, showcasing a diverse spectrum of experiences and stages in the owners' careers. This diversity suggests a mix of younger entrepreneurs and seasoned veterans who have likely accumulated extensive knowledge and expertise over the years.

The bar chart (figure 8) illustrates the distribution of owners across three age groups: 30 to 45, 45 to 60, and 60 to 75. The highest concentration of owners is within the 45 to 60 age range, indicating that this group is the most prevalent among the owners. In contrast, there are fewer owners in the 30 to 45 and 60 to 75 age ranges, with the youngest and oldest groups having the least number of owners. Overall, the chart highlights that middle-aged individuals (45 to 60) are the dominant age group among the owners.

These measures indicate that while there is variability in ages, the central tendency of the dataset places the typical owner's age around the mid-50s. This suggests a cohort of individuals who may be at a pivotal point in their careers, balancing experience with innovation and adaptation to industry trends. The distribution also highlights that while there are younger owners in their 30s, the majority are in their 50s and early 60s, potentially representing established leaders within their respective vineyards and wineries. This age profile could influence strategic decisions related to succession planning, business expansion, and adoption of new technologies and sustainable practices in viticulture and winemaking.

Overall, the dataset provides a snapshot of the age diversity among winery owners, reflecting both the continuity of established practices and the potential for new directions and innovations within the industry.

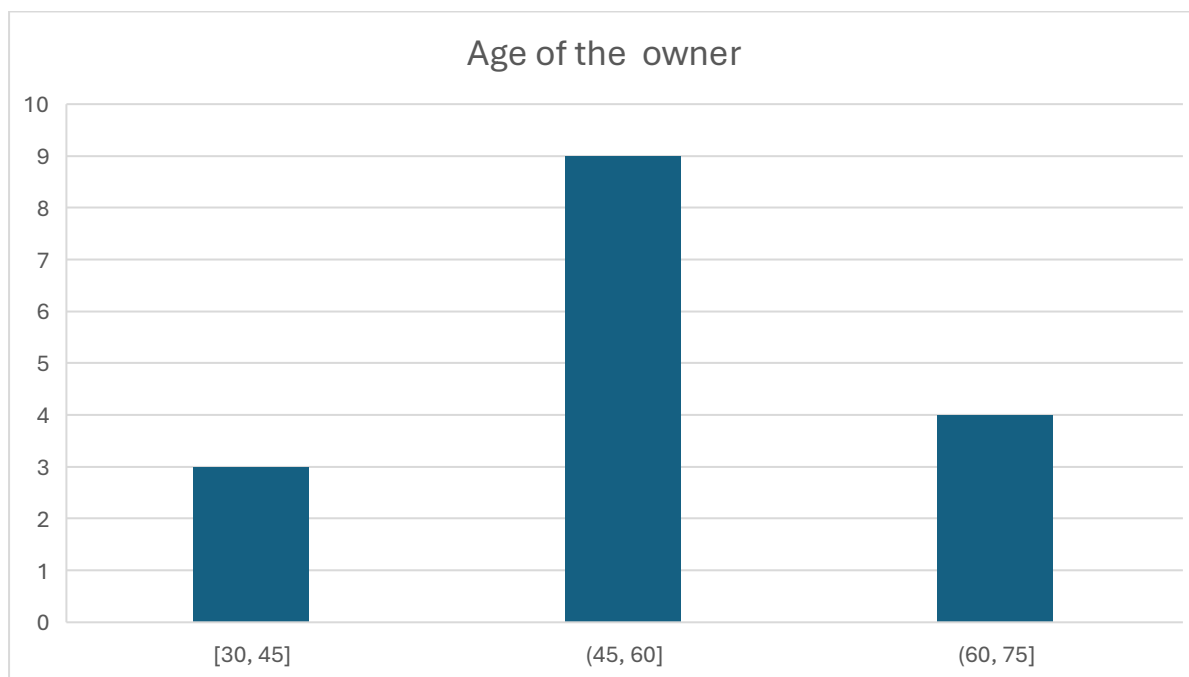


Figure 8: age of the owner graph (author's elaboration)

4.6 Gender of the owner

From the pie chart (figure 9) it is clear that 11.8% of the participants are female, while 88.8% are male. These figures highlight a significant gender disparity, which is common in many sectors, including viticulture and wine production, where leadership and participation have traditionally been predominantly male-dominated.

The presence of 11.8% female participants reflects a growing inclusion within the industry, albeit still a minority. This trend can be attributed to several factors, including evolving gender equality regulations, increased educational and professional opportunities for women in the agricultural sector, and broader cultural shifts promoting diversity and equality. On the other hand, the 88.2% male representation underscores a historical and structural predominance within the wine industry. This predominance can influence business dynamics, strategic decisions, and organizational culture within wineries, where leadership and dominant representation may reflect historical traditions and legacies.

Monitoring these data points is crucial for understanding gender balance in the wine industry, identifying opportunities to promote female participation, and developing company policies that foster an inclusive and equitable workplace environment for all individuals involved in viticulture and wine production.

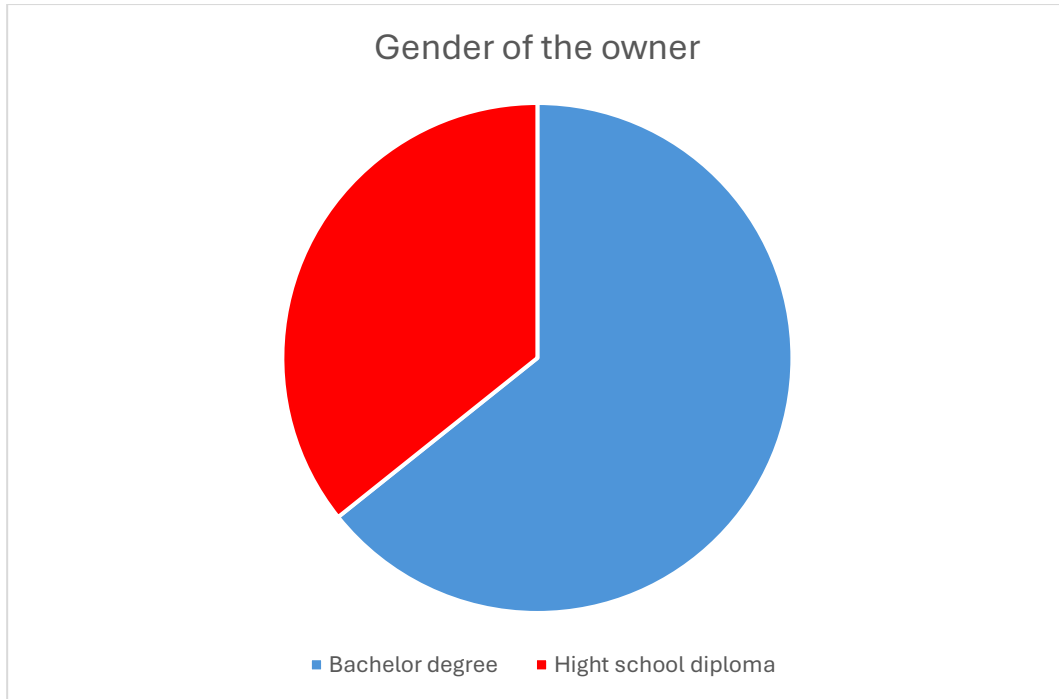


Figure 9: Gender of the owner pie chart (author's elaboration)

The comparison between the ISTAT data and the survey sample for the province of Verona reveals notable differences in the gender distribution of company owners. According to Istat, 20.6% of businesses in the province are led by women, while 79.4% are led by men. In contrast, the survey sample of 17 companies shows that only 11.8% of the companies are led by women, with 88.2% led by men. This discrepancy suggests a lower proportion of female-led businesses in the survey sample compared to the broader Verona population.

The Z-test confirms that the difference between the sample proportion (11.8%) and the Istat proportion (20.6%) is not statistically significant, with a Z-statistic of -0.898 and a p-value of 0.368, which is above the 0.05 significance level. This indicates that the observed difference could be due to random chance rather than a true variation. Therefore, while the survey results show a lower proportion of female-led businesses, there is insufficient statistical evidence to conclude a significant deviation from the Istat data. The small sample size may have contributed to this discrepancy, suggesting that a larger sample and refined sampling methods could provide more accurate insights.

4.7 The educational level of the owner

In the figure 10 , the educational attainment levels of winery owners in the viticulture sector are described as follows:

- 52.9% have a Bachelor's degree: More than half of the owners have completed a Bachelor's degree, indicating a significant proportion of higher education among respondents. This level of education typically signifies a formal academic background that may include studies relevant to agriculture, business, or viticulture.

- 29.4% have a high school diploma: Nearly one-third of the owners possess a high school diploma. This level of education suggests completion of secondary education, which provides foundational knowledge and skills applicable to running a winery business.

- 17.6% have completed middle school (third media): A minority of owners (17.6%) have completed only middle school education. This level of education, while lower than higher degrees, still contributes essential foundational knowledge and practical skills necessary for agricultural and entrepreneurial pursuits.

These educational distributions highlight a predominantly educated ownership base within the viticulture sector, with a significant emphasis on higher education such as Bachelor's degrees. This educational diversity among winery owners likely influences decision-making processes, business strategies, and the adoption of innovative practices within their operations. Understanding these educational backgrounds is essential for assessing industry trends, educational needs, and opportunities for professional development within the viticulture and wine production industry.

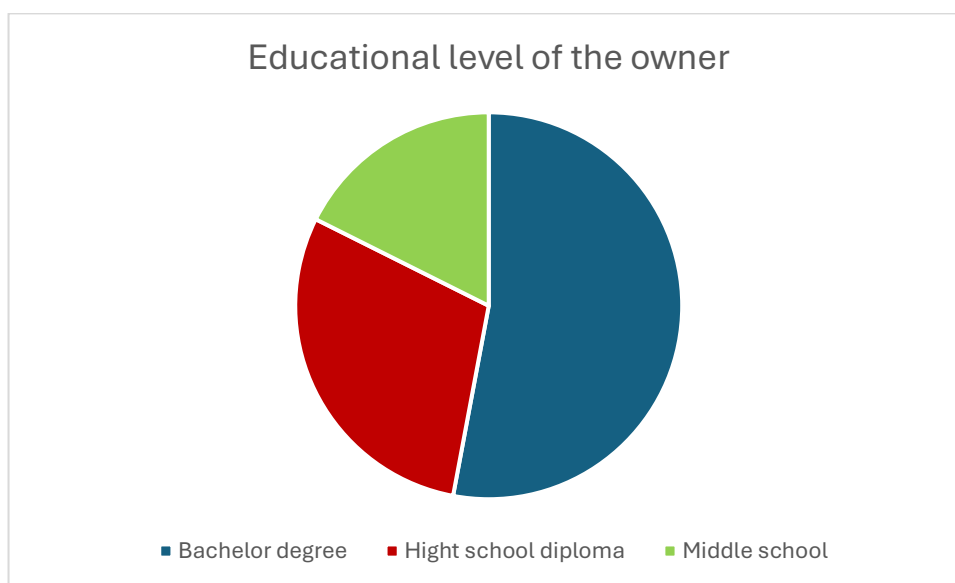


Figure 10: Educational level of the owner pie chart (author's elaboration)

From a comparison with the ISTAT data it is clear that Regarding the age and educational background of business owners, the majority are over the age of 41. This group tends to have more advanced educational qualifications, including high school diplomas and university degrees, both in agricultural and non-agricultural fields. On the other hand, younger business owners, those under 40, are less numerous and generally hold less advanced educational credentials. This distribution indicates a higher concentration of experience and advanced qualifications among the older business owners, while younger individuals tend to have less specialized education. The analysis of the data reveals that the results from ISTAT largely correspond with those obtained from the questionnaire.

The z-test analysis compared the educational levels of winery owners in a sample of 17 companies against the general population data from Istat. The results indicate that there is no statistically significant difference for the proportions of owners with middle school education ($z = -1.52$) or a high school diploma ($z = 0.448$) when compared to the general population. However, the analysis reveals a highly significant difference in the proportion of owners with a university degree ($z = 6.293$), showing that the sample has a substantially higher percentage of university-educated individuals than the general population. This suggests that the sample is notably more educated at the university level compared to the broader population of business owners in the sector.

4.8 *How many sons work in the company*

The results reveal a diverse picture of family involvement in winery businesses:

Winery	Total Sons	Sons Working in the Winery
Winery 1	0	0
Winery 2	1	0
Winery 3	5	2
Winery 4	2	1
Winery 5	2	0
Winery 6	2	2
Winery 7	0	0
Winery 8	2	2
Winery 9	2	2
Winery 10	0	0
Winery 11	0	0
Winery 12	8	2
Winery 13	0	0
Winery 14	3	2
Winery 15	3	0
Winery 16	1	0
Winery 17	1	0

The data and figure 11 reveal a spectrum of involvement:

Some wineries, like Winery 6, Winery 8, and Winery 9, showcase a robust tradition of family engagement, where all or most sons are actively participating in the winery's activities. This indicates a strong commitment to continuity and succession planning within these family-run enterprises. These wineries likely benefit from shared values, collective decision-making, and a deep-rooted understanding of their business operations.

Conversely, other wineries, despite having multiple sons, show varying levels of engagement. For example, Winery 3 has 5 sons, but only 2 are involved in the winery. This variability suggests that factors beyond family size, such as individual career aspirations, external

opportunities, or differing interests in winemaking, influence the level of participation among family members.

Understanding these dynamics is crucial for winery owners for several reasons. Firstly, it informs effective succession planning. By identifying which family members are actively engaged and interested in continuing the family legacy, owners can develop clear paths for leadership transitions and business continuity.

Secondly, it underscores the importance of fostering an environment that encourages family members to contribute their skills and passion to the winery. This might involve creating opportunities for professional growth, promoting a shared vision, and adapting business strategies to accommodate diverse interests and strengths within the family.

Lastly, the data highlights the unique challenges and opportunities that arise from blending family dynamics with business operations. It showcases how some wineries leverage familial bonds to enhance operational efficiency and preserve traditions, while others navigate complexities to balance family expectations with strategic business decisions.



Figure 11: Sons that are not involved in the activity (author's elaboration)

4.9 How many employers are family members?

The dataset provides insights into the presence of family members among the permanent employees in various wineries. Here is a description of the data:

- Wineries with No Family Members Among Employees: There are 7 wineries where none of the permanent employees are family members. This suggests that these wineries either prefer to

hire non-family members or do not have family members available or interested in working at the winery.

- Wineries with 2 Family Members Among Employees: Six wineries employ two family members each as permanent staff. This indicates a moderate level of family involvement, likely ensuring that key operational roles are managed by trusted family members while also hiring non-family employees.

- Wineries with 3 and 5 Family Members Among Employees: Two wineries have three family members working as permanent employees. This points to a higher level of family involvement, with a significant portion of the workforce being family members. One winery employs five family members. This indicates a strong family presence in the winery's operations

- Wineries with All Employees as Family Members: There is one winery where all permanent employees are family members. This suggests a completely family-run operation, emphasizing a strong family tradition.

The figure 12 shows a range of family involvement in winery operations. While some wineries have no family members among their permanent staff, others exhibit varying degrees of family participation, with some being predominantly or entirely family-run. The largest portion that we can observe in the graph is composed of family members who works full time in the winery. This portion is followed by members who have additional occupations (12%) and by members who are only marginally involved (6%).

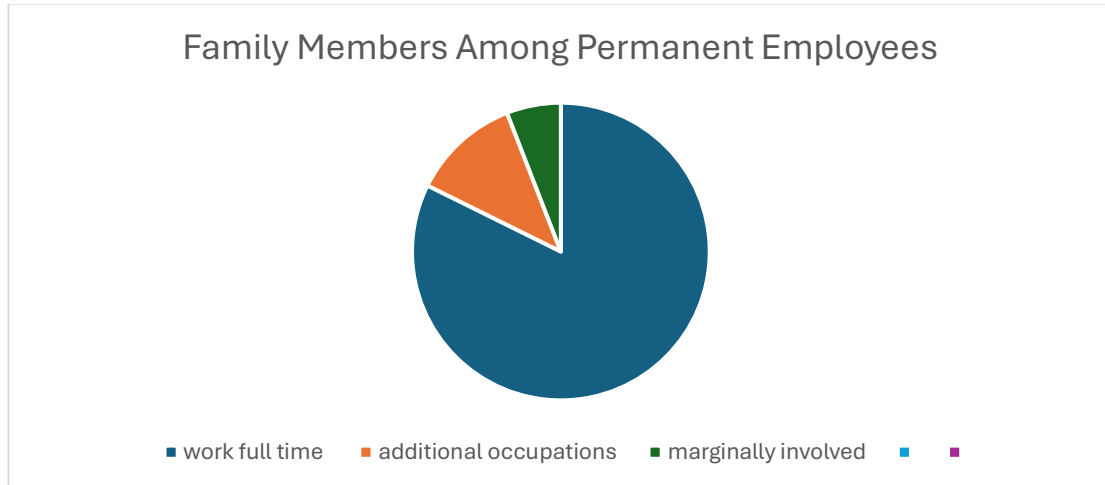


Figure 12: Time of work of family members pie chart (author's elaboration)

4.10 *How many years of working activity*

The dataset provided (figure 13) represents the number of years each winery owner has been actively involved in their respective businesses, offering insights into their experience and tenure within the viticulture and winemaking industry.

The dataset encompasses a range of experience levels among winery owners, providing a glimpse into their professional trajectories and contributions to their businesses:

- **Long-Standing Owners:** Owners with longer tenures, such as those with 35 years or more of experience, signify a deep-rooted commitment to their businesses. These individuals likely possess extensive industry knowledge, leadership skills, and a comprehensive understanding of both the operational and strategic aspects of winery management.

- **Moderate Experience:** Owners with experience ranging from 10 to 35 years represent a significant portion of the dataset. This range suggests a mix of established leaders who have navigated various market conditions, adapted to industry changes, and contributed to the growth and sustainability of their wineries.

- **New Entrants:** The presence of owners with relatively fewer years of experience, such as those with 1 year or less, underscores the influx of new talent and perspectives into the industry. Indeed there is only a winery with this characteristics; these owners bring fresh insights, innovative approaches, and a commitment to driving their wineries forward in a competitive market.

Understanding the varied years of experience among winery owners informs strategic decision-making in several critical areas:

- **Leadership and Succession:** Long-tenured owners play a pivotal role in succession planning, ensuring continuity and preserving the business's legacy. They often mentor younger generations and groom successors to uphold operational excellence and strategic vision.

- **Innovation and Adaptation:** Experienced owners leverage their accumulated knowledge to innovate, embrace technological advancements, and capitalize on emerging trends. This strategic agility enables wineries to stay competitive, enhance product offerings, and expand market reach.

- **Entrepreneurial Spirit:** Newer owners bring entrepreneurial zeal, driving growth through initiatives like market diversification, sustainability practices, and customer-centric strategies. Their fresh perspectives inject dynamism into established operations, fostering innovation and resilience.

The dataset reflects the dynamic nature of the wine industry, characterized by a blend of tradition and innovation. Owners' varying years of experience underscore industry evolution, regulatory shifts, and evolving consumer preferences that shape market dynamics. In conclusion, the dataset on years of experience among winery owners offers a comprehensive view of leadership, resilience, and strategic foresight.

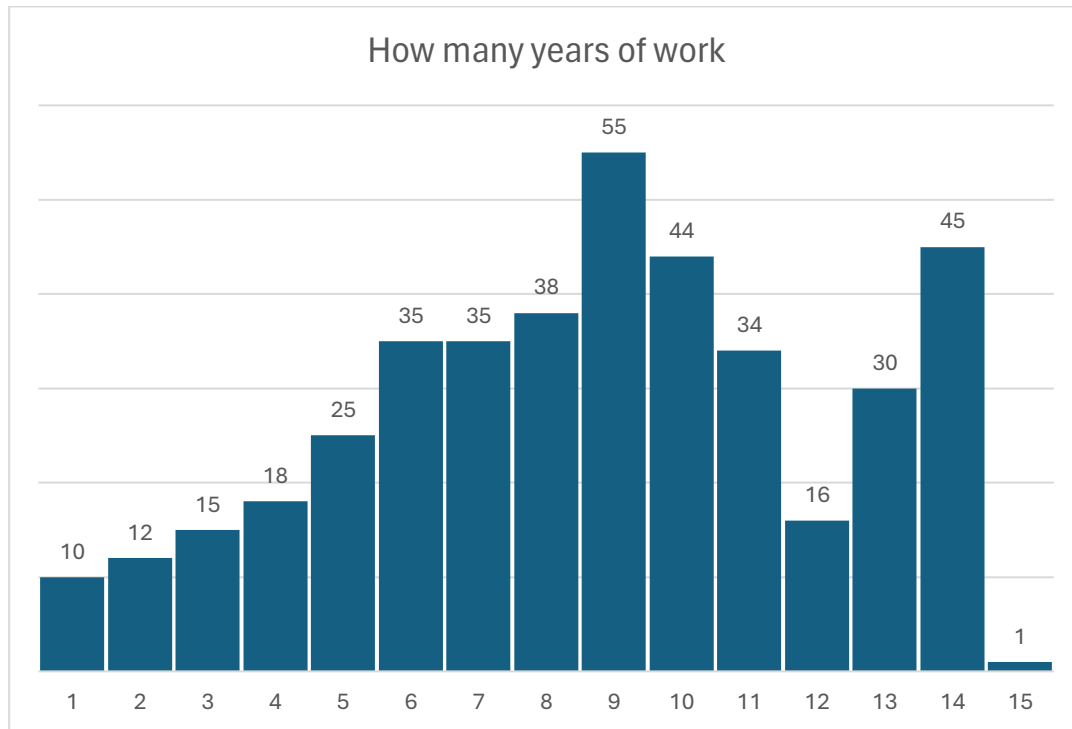


Figure 13: owner's years of work graph (author's elaboration)

The ISTAT survey data indicates that business owners in the surveyed municipalities are predominantly over the age of 41. Additionally, most of these business owners have been operating their businesses for more than 10 years, highlighting the experience and longevity of business ownership in these areas. On the other hand, the owners under the 40 represents a minority. The data from our survey sample closely aligns with the ISTAT data, demonstrating a strong correlation and consistency between the findings of our study and the broader statistical information provided by ISTAT.

The Z-tests comparing the years of experience of entrepreneurs in our sample with the ISTAT data reveal no significant differences across the three experience categories. For entrepreneurs with over 10 years of experience, the sample proportion of 87.5% was compared to the ISTAT proportion of 72.9%, resulting in a Z-statistic of 1.32 and a p-value of 0.187. This indicates that the observed difference is not statistically significant. Similarly, for entrepreneurs with 3 to 10 years of experience, the sample proportion of 6.25% was compared to the ISTAT proportion of 18.5%, yielding a Z-statistic of -1.26 and a p-value of 0.208, suggesting no significant difference. Finally, for those with less than 3 years of experience, the sample proportion of 6.25% was compared to the ISTAT proportion of 8.7%, with a Z-statistic of -0.35 and a p-value of 0.727, also showing no significant difference. Overall, these results indicate that the proportions of entrepreneurs in each experience category in our sample are statistically consistent with those reported by ISTAT, suggesting that our sample reflects the broader population's distribution of years of experience.

4.11 How did he start running the company?

The pie chart (figure 14) significant insights into the succession patterns among winery owners. A substantial majority, 82.4%, of the interviewed entrepreneurs began managing their wineries by taking over from a parent or a relative. This indicates a strong tradition of family succession within the winemaking industry, highlighting the importance of generational continuity and the transmission of knowledge, skills, and business practices from one generation to the next.

Conversely, 17.6% of the owners started their management roles without taking over from a family member, in this way they have purchased some vineyards to start their activity. This smaller segment represents entrepreneurs who either founded their wineries independently or took on leadership without familial succession. These individuals likely bring diverse perspectives and innovative approaches to the industry, potentially driven by different motivations and strategies compared to those who inherited their roles.

Overall, the data underscores the prominence of family legacy in the winemaking sector, while also acknowledging the presence of new entrants who contribute to the industry's evolution and dynamism.

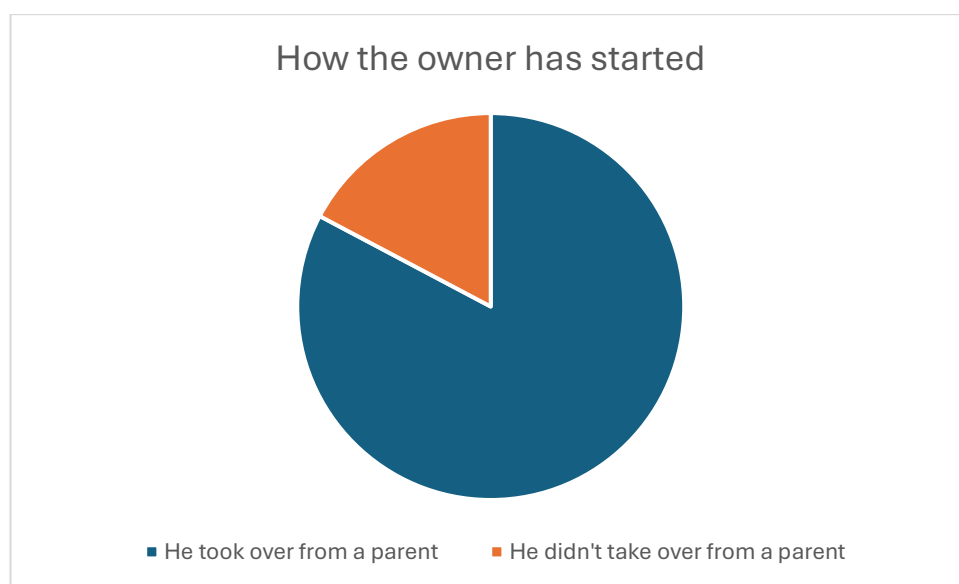


Figure 14: How the owner got the activity pie chart (author's elaboration)

4.12 Analysis of Winery Owners' Involvement in the Business

From the survey we know the level of involvement of winery owners in the day-to-day operations of their businesses. A significant majority, 82.4%, work full-time in their wineries. This indicates

a strong commitment to their business, likely overseeing all aspects of winery operations, from production to marketing and sales.

In contrast, 11.8% of the owners have additional occupations alongside managing their wineries. These individuals balance their time between multiple roles, suggesting a diversified professional portfolio. This could be indicative of owners who may have other businesses, hold external employment, or engage in various professional activities outside the winery.

Finally, 5.9% of the owners are involved in their wineries only marginally. Their limited engagement might mean they play a more strategic or advisory role, relying on other managers or family members to handle the day-to-day operations.

These results (figure 15) highlight the different levels of engagement among winery owners, ranging from full-time dedication to more diversified or minimal involvement.

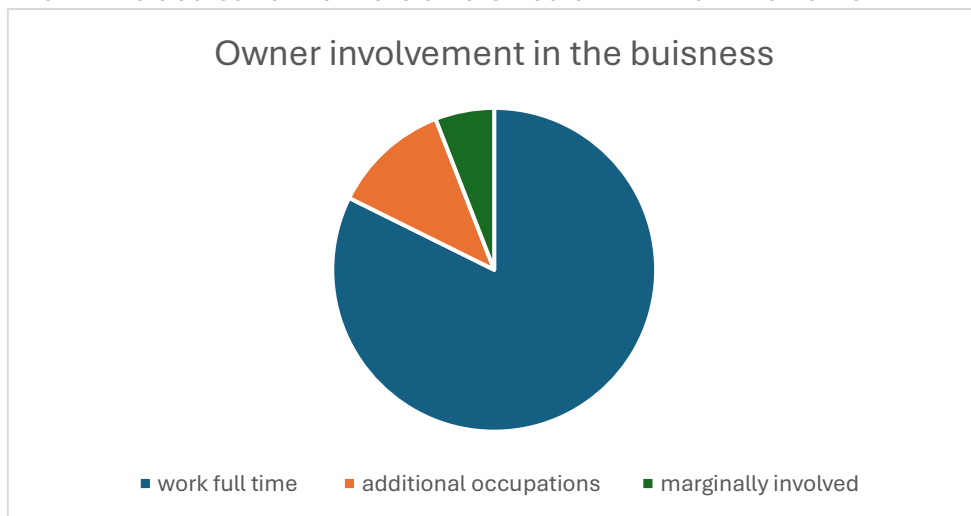


Figure 15: Amount of work time of the owner pie chart (author's elaboration)

4.13 Sales data analysis

This section presents a comprehensive analysis of the sales distribution for wineries that responded to the questionnaire. The sales data is segmented into four geographic levels: provincial, regional, national, and international. For each of these segments, pie charts will be provided to visualize the percentage distribution of sales within each category. The following subsections detail the sales performance at each geographic level, based on the provided datasets.

These detailed analyses provide a sneak-peak into the geographical distribution of sales for the wineries surveyed; highlighting varying levels of market penetration and focus across provincial, regional, national, and international levels. The following pie charts will visually represent these distributions for a clearer understanding of the sales.

Provincial Sales Distribution

The data for provincial sales is categorized into six percentage ranges. Here is a detailed breakdown:

- 0-5%: 7 wineries report that 0-5% of their sales are within the province, indicating minimal local market penetration.
- 5-10%: 3 wineries have 5-10% of their sales at the provincial level.
- 10-20%: 2 wineries fall into this range, showing a slightly higher provincial sales focus.
- 20-30%: 1 winery reports that 20-30% of their sales are provincial.
- 30-50%: 2 wineries achieve 30-50% of their sales locally.
- 75%: 1 winery has a significant provincial sales focus

The market penetration of Valpolicella wines within their province of origin is currently minimal, indicating a limited presence in the market segment. Data shows (figure 16) that these wines have not achieved widespread distribution or consumer adoption within their local market area. While one winery commands 75% of its market share, it is evident that this is an exceptional case.

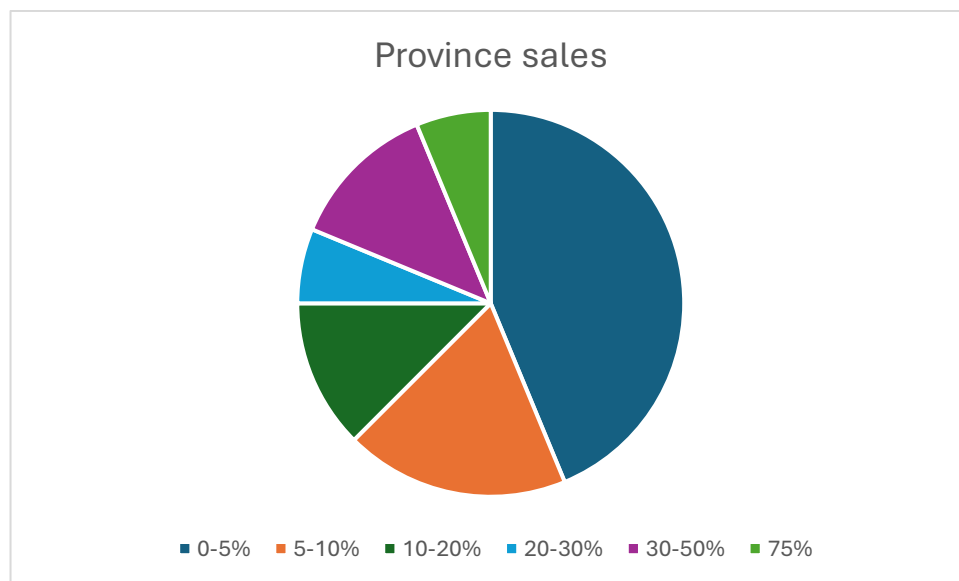


Figure 16: province sales pie chart (author's elaboration)

Regional Sales Distribution

The regional sales data is categorized into three percentage ranges:

- 0-5%: 5 wineries report 0-5% of their sales within the region, showing limited regional market engagement.
- 10-20%: 5 wineries have 10-20% of their sales regionally, indicating a moderate regional presence.
- 30-50%: 3 wineries report 30-50% of their sales in the regional market.

In this case, the data reveals that market penetration is notably concentrated among a select few wineries, with just three establishments capturing over 30% of the market share. Conversely, most of wineries account for smaller portions, typically falling within the range of 0% to 20% of total sales in the Veneto region. This distribution that we can observe in the figure 17 highlights a low-medium market presence among wineries, underscoring the dominance of a minority while illustrating the challenges faced by many in achieving broader market reach.

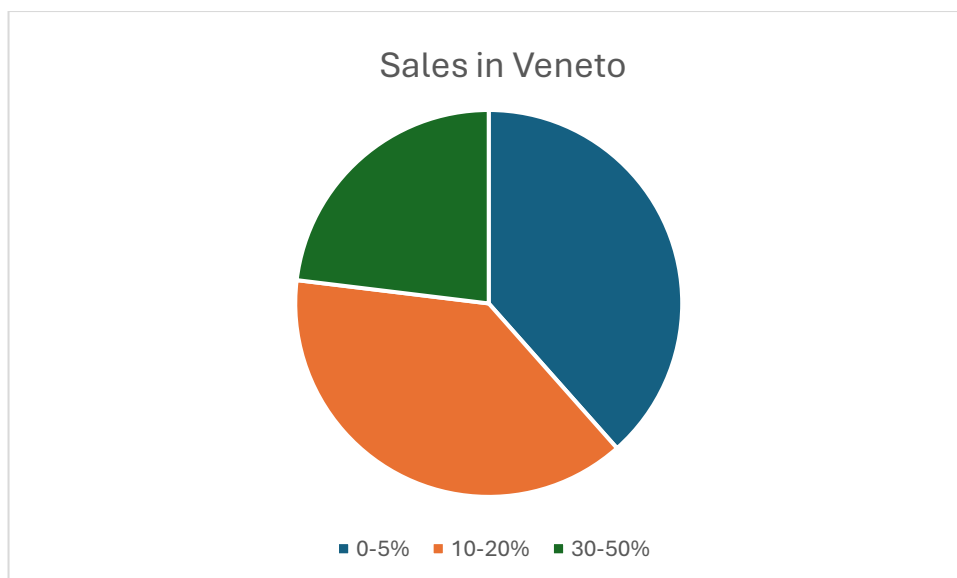


Figure 17: sales in Veneto pie chart (author's elaboration)

National Sales Distribution

The national sales data covers five percentage ranges:

- 0-10%: 5 wineries have 0-10% of their sales nationally, indicating minimal national distribution.
- 10-20%: 2 wineries report 10-20% of their sales at the national level.
- 20-40%: 6 wineries achieve 20-40%, showing a significant national presence.
- 50%: 1 winery reports that 50% of its sales are national.
- 75%: 1 winery has 75% of its sales within the country, indicating a dominant national market focus.

In this case, the national market for Valpolicella wines demonstrates stronger presence compared to provincial and regional sales figures. The data (figure 18) reveals a dual scenario: five wineries exhibit minimal national distribution, whereas another six enjoy a significantly developed distribution network. This disparity underscores varying degrees of market penetration within the national context, highlighting both challenges and successes among Valpolicella wine producers on a broader scale. There is just one winery that has the 75% of its market, but we can conclude that this is an exception.

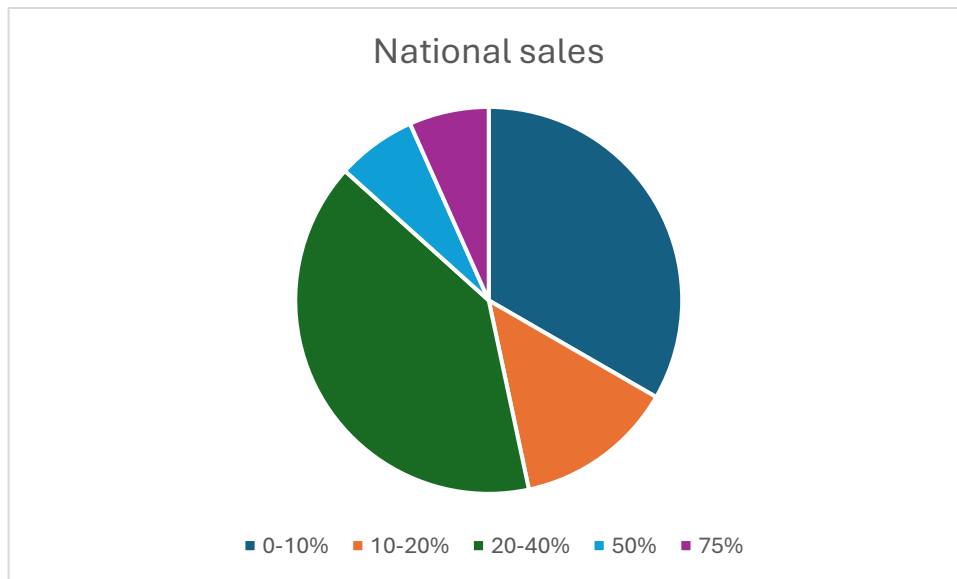


Figure 18: national sales pie chart (author's elaboration)

International Sales Distribution

The international sales data (figure 19) is divided into five percentage ranges:

- 0-10%: 2 wineries report 0-10% of their sales internationally, indicating minimal export activity.
- 20-30%: 2 wineries have 20-30% of their sales from international markets.
- 50-60%: 5 wineries achieve 50-60% of their sales internationally, indicating a strong export focus.
- 60-70%: 2 wineries report 60-70% of their sales abroad.
- 70-100%: 4 wineries have 70-100% of their sales coming from international markets, showing a dominant focus on exports.

In this market segment, we observe the highest level of development among the four. Few wineries have a market share below 50%, indicating strong success in international markets for this category of wine. Most of the wineries export between 50% and 60% of their production, underscoring their significant international presence. Additionally, there are four wineries that exceed a 70% export rate, highlighting their heavy reliance on international markets for most of their sales. This data suggests a robust performance of these wines abroad, reflecting their strong appeal and market demand beyond their domestic region.

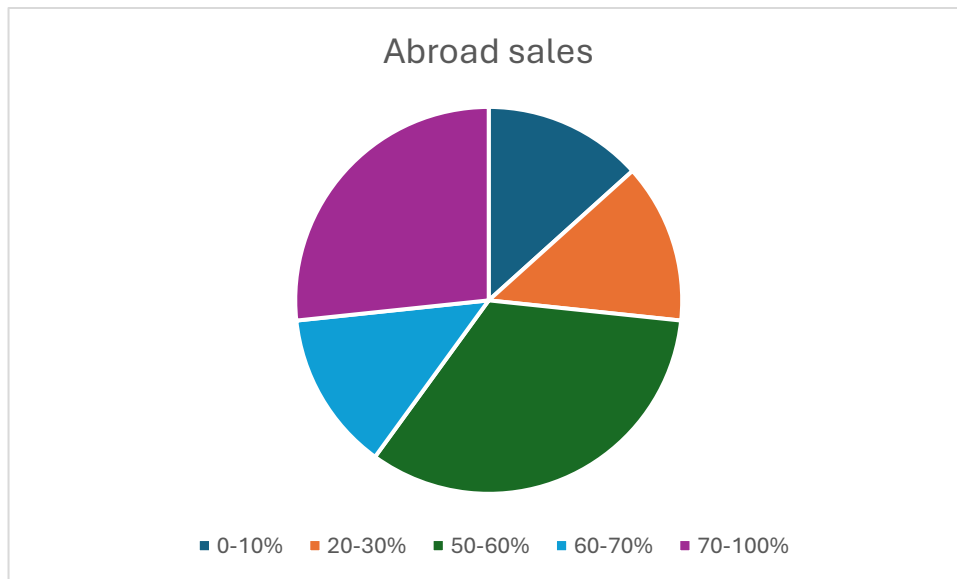


Figure 19: international sales pie chart (author's elaboration)

Wine in the direct sales

The data (figure 20) indicates how wineries distribute their products directly to wine shops, highlighting varying levels of reliance on this distribution channel among different wineries; the results are categorized into specific percentage ranges.

- 0-5%: This range has the highest frequency with 6 occurrences. It indicates that 6 wineries out of the dataset's total have direct sales to wine shops accounting for between 0% and 5% of their total sales volume. This suggests that a significant number of wineries are more developed in other channels.

- 5-20%: The next most frequent range with 4 occurrences including wineries where direct sales to wine shops constitute between 5% and 20% of their total sales. It shows a moderate level of involvement in this distribution channel.

- 30-40%: This range appears 3 times.

- 50%: This specific percentage appears once, indicating that 1 winery derives exactly half of its total sales from direct sales to wine shops. This winery is heavily dependent on this distribution channel.

- 80%: Lastly, this percentage range also appears once, suggesting that another winery has an exceptionally high dependency on direct sales to wine shops.

Based on the data, it is evident that the majority of wineries have relatively low levels of direct sales to wine shops. The most common ranges are between 0-5% and 5-20%, indicating that these percentages represent the average distribution among wineries. Instances where wineries have a higher involvement in direct sales, such as the 30-40%, 50%, and 80% ranges, are rare and represent isolated cases.

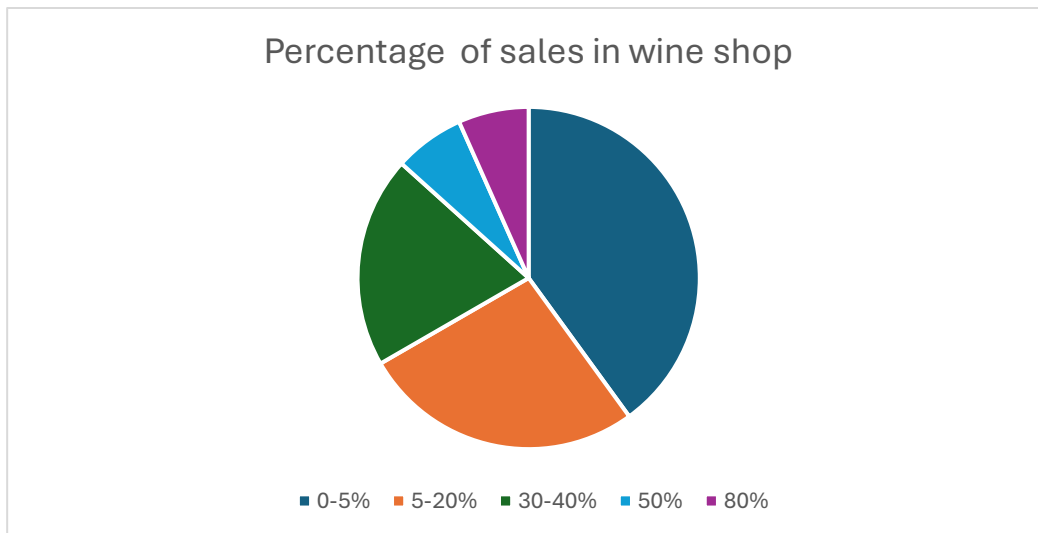


Figure 20: direct sales pie chart (author's elaboration)

4.14 The main sales channel

This chart (figure 21) illustrates the percentage distribution of sales through the main distribution channels for companies. Here's a detailed description of each channel:

- Wholesalers (35.30%): As we can see in the graph this is the primary channel through which companies sell their products, accounting for over a third (35.30%) of total sales. Wholesalers purchase large quantities of wine from producers to sell to retailers and restaurants.
- Wine bars (17.60%): Wine bars represent the second most significant channel, comprising 17.60% of total sales. These establishments specialize in selling and tasting wine, serving as crucial distribution points for wineries.
- Restaurants (23.50%): The graph shows that restaurants constitute the second important sales channel, accounting for 23.50% of total sales. This indicates that many consumers purchase wine directly at restaurants during meals.
- Events (5.90%): Events represent a smaller percentage of total sales, at 5.90%. This channel includes wine fairs, food festivals, and other events where wine is sold or offered as part of the experience.
- Importers (11.80%): Importers contribute 11.80% of total sales. These entities purchase wine from foreign producers to resell it in the local market.
- Direct sales (5.90%): Direct sales account for another 5.90% of total sales. This channel includes direct sales from producers to end consumers through wineries, cellar doors, or online platforms.

This breakdown highlights how companies distribute their products through a variety of channels, with a strong emphasis on wholesalers followed by wine bars and restaurants. Direct

sales, events, and importers also play significant roles in the overall sales mix, reflecting the diversification and distribution strategy of wineries.

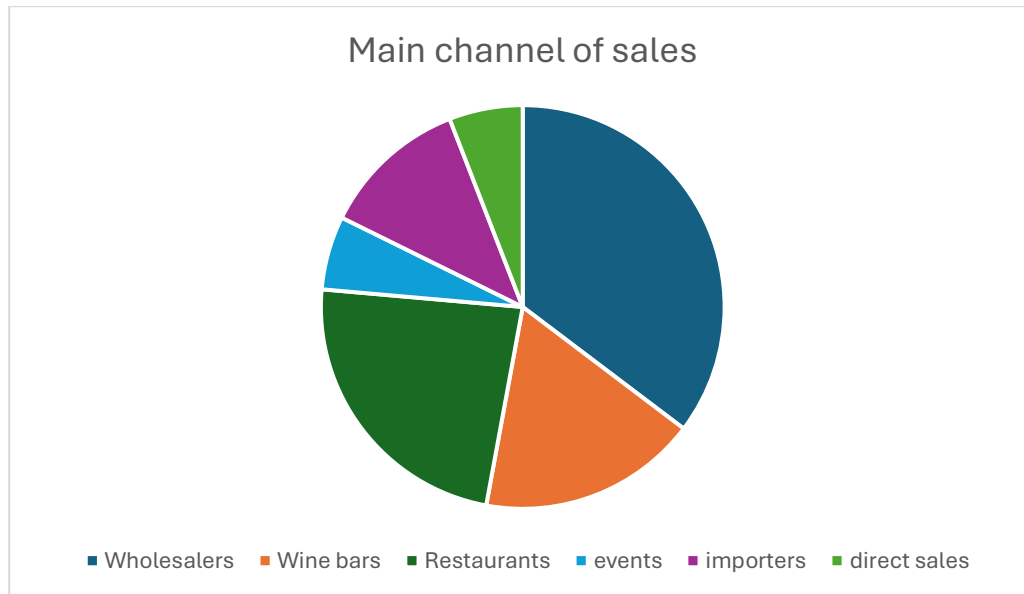


Figure 21: main channels of sales pie chart (author's elaboration)

4.15 Typologies of wine produced by the wineries

The figure 22 provides insights into the types of wine production undertaken by the surveyed wineries, categorized by their adherence to denomination standards. The results are as follows:

- Wineries Producing Wine with Denomination (DOCG/DOC): 35.3% of the wineries produce wines that carry a Denomination of Controlled and Guaranteed Origin (DOCG) or Denomination of Controlled Origin (DOC). This category of wines is subject to strict regulations regarding grape varieties, production methods, and geographic origin, ensuring high quality and authenticity. The substantial proportion of wineries focusing on denominated wines highlights their commitment to quality and adherence to traditional winemaking standards.
- Wineries Producing Wine Without Denomination: 5.9% of the wineries produce wines that do not carry any denomination. These wines may offer more flexibility in production methods and grape sourcing, potentially allowing for innovation and experimentation. However, they do not benefit from the marketing advantages and consumer recognition associated with denominated wines.
- Wineries Producing Both Denominated and Non-Denominated Wines: The majority, 58.8% of the wineries, produce both types of wines. This dual approach allows wineries to cater to diverse market segments. By offering high-quality DOCG/DOC wines alongside more flexible non-denominated wines, these wineries can attract a broader range of consumers, balancing tradition with innovation and potentially enhancing their market presence and profitability.

Overall, the data reveals a significant inclination towards producing high-quality, denominated wines, with many wineries also diversifying their offerings to include non-denominated wines.

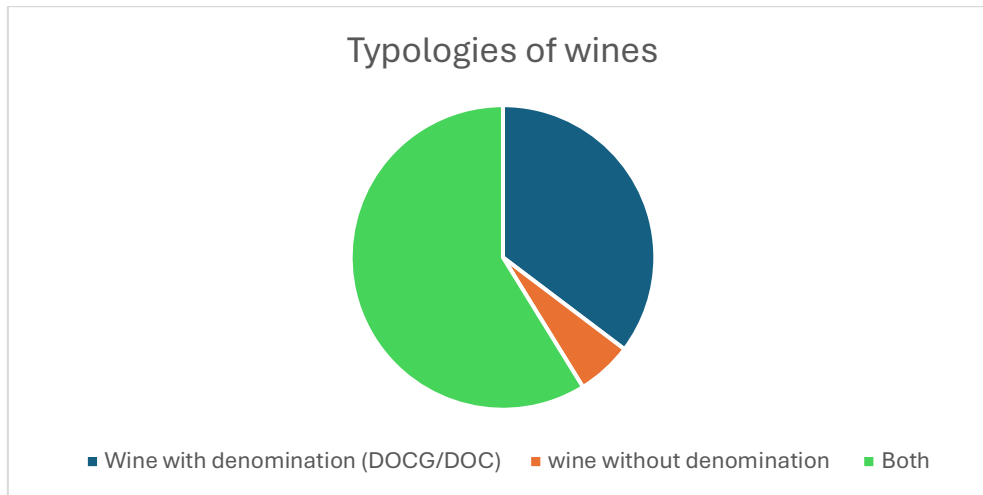


Figure 22: wine with denomination pie chart (author's elaboration)

4.16 Sales of Organic Certified Products

This section presents data on the production and sale of organic certified products among the wineries that participated in the survey. The figure 23 highlights the extent to which wineries are involved in organic production, whether they focus solely on organic wine, include other organic products, or do not engage in organic certification at all. The following analysis provides a detailed breakdown of these practices within the surveyed wineries.

- No Organic Products: 58.8% of the wineries do not produce or sell any organic certified products. This majority indicates that a significant portion of wineries either do not engage in organic farming practices or choose not to certify their products as organic. This could be due to various reasons such as the costs associated with organic certification, challenges in maintaining organic standards, or market strategy focusing on non-organic products.

- Only Organic Wine: 29.4% of the wineries produce and sell only organic certified wine. This substantial percentage highlights a growing trend and commitment towards sustainable and environmentally-friendly viticulture practices. These wineries focus solely on organic wine production, appealing to the increasing consumer demand for organic products and leveraging the benefits of organic certification in marketing and product differentiation.

- Organic Wine and Other Organic Products: 11.8% of the wineries not only produce organic wine but also other organic products. This indicates a diversified approach to organic farming, where wineries expand their product lines to include a variety of organic goods. This strategy could help in broadening their market reach, catering to health-conscious consumers, and maximizing the use of their organic farming practices.

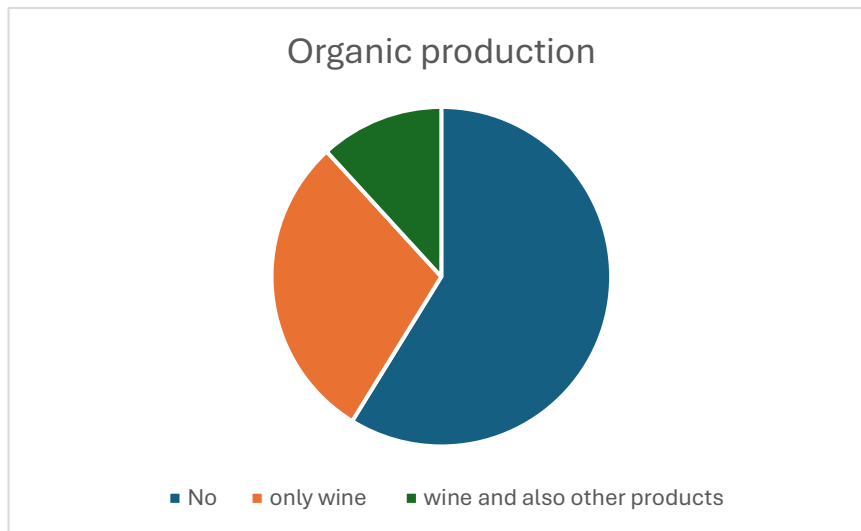


Figure 23: diversification in organic production pie chart (author's elaboration)

The graph reveals a diverse approach to organic production among wineries. While the majority do not engage in organic certified production, a significant portion is dedicated to producing only organic wine, and a smaller segment diversifies into other organic products as well. This reflects the varying strategies and market orientations of wineries in response to the demand for organic products.

From a comparison with the Istat data in the municipalities of the surveyed area, we observe that only 7.45% of farms adopt organic practices, which contrasts sharply with the 41.2% observed in our survey sample. The Z-test reveals a significant discrepancy between these proportions, with a Z-statistic of 5.31 and a p-value well below 0.01, indicating that the higher proportion of organic crop farms in the survey is statistically significant. This difference suggests that the prevalence of organic methods in our survey is substantially higher than the broader data reported by Istat. Such a finding highlights that organic practices are less common in the general population than indicated by our survey, underscoring potential barriers or regional variations influencing the adoption rate. The significant divergence points to a possible discrepancy between the surveyed sample and the broader regional trends, suggesting that organic farming practices may not be as widespread as our data initially suggested.

4.17 Types of Wine Tourism Activities Offered by Wineries

This section presents data on the wine tourism activities offered by the wineries that participated in the survey. The chart (figure 24) categorizes the types of enotourism activities available, ranging from wine tasting to comprehensive tours that include both winery and vineyard visits. This analysis provides an overview of how wineries engage with visitors through various tourism offerings, enhancing their brand experience and consumer education.

Here is a detailed description of the data:

- Tasting Only: Five wineries offer wine tasting as their sole enotourism activity. This basic level of engagement allows visitors to sample and appreciate the wines produced by the winery, providing a direct experience of their products and potentially encouraging purchases.
- Tasting and Winery Visit: Six wineries provide a combination of wine tasting and tours of their winery. This approach offers visitors a more immersive experience, showcasing the wine production process, facilities, and craftsmanship behind the wines. It enhances the overall visitor experience by providing insights into the winery's operations and history.
- Tasting, Winery Visit, and Vineyard Tour: Another five wineries offer a comprehensive package that includes wine tasting, a visit to the winery, and a tour of the vineyard. This full experience allows visitors to see the complete journey of wine production, from the vineyard where the grapes are grown to the winery where the wine is made and finally to the tasting room. It offers a deeper understanding of the winemaking process and the terroir.
- No Enotourism Activities: One winery does not engage in any enotourism activities. This may indicate a focus on production and distribution rather than on direct consumer engagement through tourism.

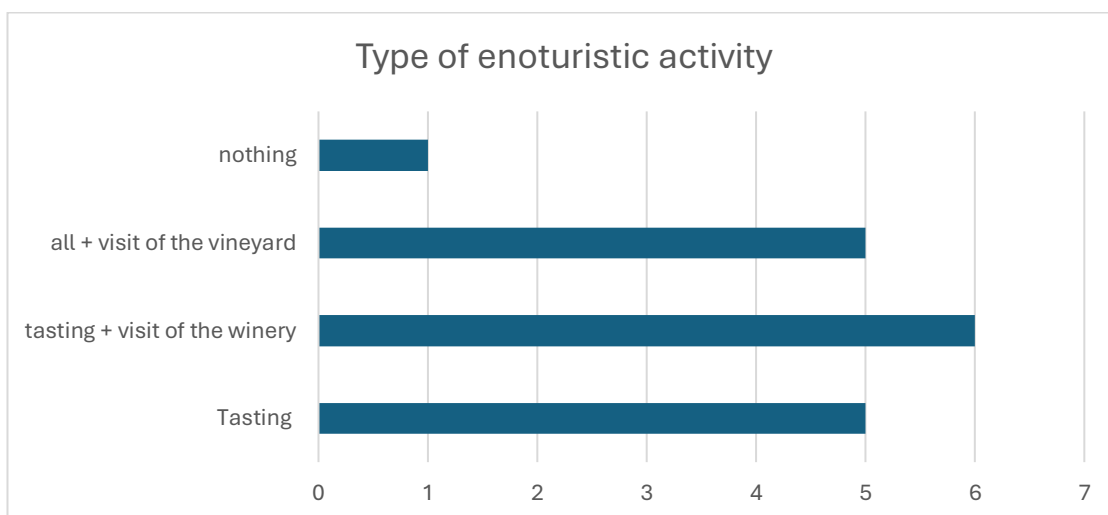


Figure 24: main diversification activities (author's elaboration)

In the graph we can see a varied approach to wine tourism among the wineries. A significant number offer tasting and tours, either of the winery alone or including the vineyard, enhancing visitor engagement and education. A smaller segment focuses solely on wine tasting, while one winery does not participate in wine-tourism at all. These activities highlight the importance of wine tourism as a strategy for promoting wineries, educating consumers, and enhancing the overall brand experience.

4.18 Other diversification activity

This section presents data on the various diversification activities undertaken by the wineries that participated in the survey. Diversification strategies include direct sales, third-party

activities, energy production, and the sale of olive oil and other products as we can see in the figure 25. The following analysis provides an overview of these activities, highlighting how wineries expand their business operations beyond traditional winemaking to enhance revenue and sustainability.

Here is a detailed description of the data:

- **Direct Sales:** The most common diversification activity, with 12 wineries engaging in direct sales. This approach allows wineries to sell their products directly to consumers, bypassing intermediaries and enhancing profit margins. It also provides opportunities for direct customer engagement and feedback, fostering stronger customer relationships and loyalty.

- **Third Party Activities:** Only one winery is involved in third party activities. This could include renting out facilities for events, providing consulting services, or other business ventures that leverage the winery's resources and expertise.

- **Energy Production:** Two wineries have diversified into energy production. This could involve generating renewable energy, such as solar or wind power, either for their own use or for sale to the grid. Such initiatives not only provide an additional revenue stream but also demonstrate a commitment to sustainability and environmental stewardship.

- **Olive Oil Selling:** One winery is engaged in the production and sale of olive oil. This diversification aligns well with the agricultural nature of winemaking and allows the winery to utilize their land and expertise in growing and processing another high-quality product.

- **Production and Selling of Other Products:** One winery produces and sells other products. This broad category can include various agricultural or artisanal goods, providing additional income sources and leveraging the winery's existing brand and distribution channels. The data highlights the diverse range of activities that wineries engage in to diversify their income streams and utilize their resources effectively. While direct sales are the most prevalent, other activities such as energy production and olive oil selling demonstrate innovative approaches to business diversification, contributing to the overall resilience and sustainability of the wineries.

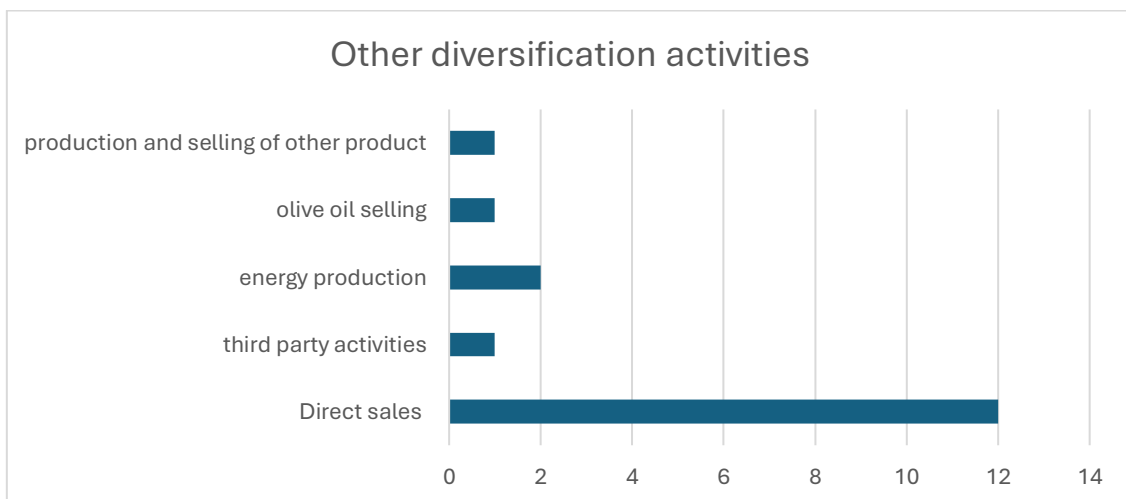


Figure 25: secondary diversification activities (author's elaboration)

4.19 Motivation for introducing wine-tourism activities

In the survey, winery owners with wine-tourism activities were asked to specify their motivations for introducing these activities. The question was: "In the case of my company, I decided to introduce wine-tourism activities to..." The responses were measured on a scale from 1 to 7, with 1 indicating total disagreement and 7 indicating total agreement. This section analyzes the level of agreement with 18 sentences reflecting different motivations for engaging in this kind of activities. In this question 14 wineries has answered, meaning that the most part of them manage this kind of activity.

The statements are:

- Personal motivation (e.g., trying something new, facing new challenges, attraction to these activities)
- Increase the income of my business
- Make my business income more stable
- Reduce the risk associated with other company activities
- Have access to particular sources of financing
- Increase the value of my company
- Make best use of previously under-used company spaces
- Provide employment to members of my family
- Rationalize the use of company labor (e.g., seasonality)
- Enhance the knowledge/skills of the personnel employed in the company
- Promote the direct sale of products
- Increase the valorisation of company products
- Increase consumer awareness of the company
- Increase consumer loyalty to the company
- Improve the image of the product for the consumer
- Take advantage of the company's location in an area with a high tourist vocation
- Take advantage of the company's location in an area with a high wine-growing vocation
- Take advantage of the company's position from a landscape point of view (e.g. panorama, scenic views)

The main results

Statement	Mean	Standard Deviation	Minimum Value	Maximum Value
Personal motivation	4.00	2.31	1	7
Increase income	6.38	1.20	4	7
Make income more stable	4.88	2.03	2	7
Reduce risk	3.75	2.41	1	7
Access to sources of funding	2.38	2.12	1	7
Increase the value of my company	5.38	2.16	1	7
Make the best use of company spaces	4.00	2.35	1	7
Employ family members	3.75	2.14	1	7

Figure 26: Agreement degree of these sentences (author's elaboration)

Analyzing the figure 26 about "personal motivation", responses were widely dispersed, with some answers expressing strong agreement and others showing significant disagreement.

In terms of “increasing income”, there was a clear consensus, with most respondents strongly agreeing with the statement: indicating that many winery owners see it as a vital means to boost their revenue. The statement about “making income more stable” got a range of responses: some respondents agreed, others were neutral or disagreed, reflecting diverse views. When it came to “reducing risk” a notable number of respondents disagreed, suggesting that not all winery owners perceive this diversification activity as a strategy for mitigating business risks. The high standard deviation of 2.41 underscores the significant disagreement on this topic, particularly among older owners, those who employ only family members, or those with other occupations. The characteristics of those who disagreed are the older age of the owners, all the employers are part of the family, the owners have also other occupations.

The sentences about “access to sources of funding” garnered the most disagreement, with the majority of respondents indicating strong disagreement. This suggests that many winery owners do not view this activity as a significant factor in improving their access to funding.

For the statement on “increasing the value of my company”, there was strong agreement among respondents. This means that many winery owners believe that engaging in wine-tourism enhances the overall value of their business.

The idea of “making the best use of company spaces” shows varied opinions generating a high standard deviation of 2.35 which indicates significant differences in how respondents value this aspect: some owners see optimizing company spaces as an important opportunity, while others do not attribute much importance to it. Four companies are completely against this notion, yet there is also a significant number that agree to some extent. This variation implies differing views on the importance and impact of optimizing physical spaces within the company. indeed, who expressed disagree its winery has not a very long story and they do not have a very big number of employees. Furthermore, companies that disagreed with this statement also expressed disagreement with the access to sources of founding and with rationalize the use of company labor.

The motivation to “employ family members” is another area where opinions are mixed with a deviation standard of 2,35. Four companies totally disagree with this idea, while others are more supportive. Companies that completely agree with employing family members tend to be smaller, family-owned operations with strong family ties and fewer non-family employees. These businesses are often managed by individuals who have inherited the enterprise from family members, thus maintaining a solid family tradition, focusing on local markets and direct sales, where personal connections and trust between producer and consumer play a crucial role.

Consequently, this type of management emphasizes family involvement not only as a workforce but also as a fundamental aspect of the company's identity and value.

On the other hand, wineries that completely disagree tend to be larger, with a significant number of non-family employees and a strong presence in export markets. The management of these companies is often more professional and less family-centric, favoring management practices based on skills and expertise rather than familial ties. This preference for professional management reflects a business strategy aimed at broader growth and access to international markets, where competence and experience are essential for success.

Sentence	Average	Standard deviation	Minimum value	Maximum value
Rationalize the use of company labor	3.0	1.52	1	5
Enhance the skills of the staff	4.0	1.36	1	6
Promote direct sales of products	5.0	0.0	5	6
Increase the valorization of company products	6.0	0.0	6	6
Increase the company's awareness	6.0	0.0	6	6
Increase customer loyalty	5.0	0.74	4	6
Improve product image	6.0	0.0	6	6
Leverage the company's location	5.0	0.0	5	6

Figure 27: Agreement degree of these sentences (author's elaboration)

With the “rationalization of the use of company labor” we can observe in the figure 27 a general reluctance to strongly agree with the idea of rationalizing labor use. Most respondents are either neutral or lean towards disagreement, with a notable number strongly disagreeing. Enhancing “the skills of the staff” shows us a moderate level of agreement on the importance of enhancing staff skills. Five companies fully agree with this statement, suggesting a strong commitment to staff development. For those who are completely in agreement with the statement, their businesses operate with a focus on local markets. The owners in these companies frequently come from a family background, having taken over the business from previous generations. On the other hand, companies that completely disagree are generally larger, have more non-family employees, and are heavily involved in export activities.

Promoting “direct sales of products” received overwhelming support, with almost all respondents strongly agreeing. This underscores the importance of direct sales as a critical objective for those involved in enotourism.

The statement about “increasing the valorization of company products” has met an unanimous agreement with twelve companies completely agree with this statement, showing a clear consensus on the importance of enhancing the perceived value of their products.

About “increasing the company's awareness” is a priority for many respondents; with twelve companies that have completely agreed with this statement, showing a clear consensus on the importance of enhancing the perceived value of their products.

The sentence “improving product image” got twelve agreement highlighting a shared focus on improving the company's visibility and recognition. These findings suggest that winery owners view wine-tourism as a powerful tool for enhancing their brand and market presence.

Finally, the statements about “leveraging the company's location” also received strong agreement, indicating that many winery owners see the strategic advantage of their location as a key component of their activity.

4.20 Motivation for Introducing Enotourism Activities in Wineries that do not have it

The questionnaire also targeted wineries without existing enotourism activities, asking them to express their level of agreement with the same sentences of the previous question. The responses were recorded on a scale from 1 to 7, where 1 signifies total disagreement and 7 signifies total agreement. In this question only 3 wineries have answered, meaning that just a small fraction have not yet this kind of activity.

For the statement "Personal motivation", responses indicated minimal agreement, with most participants either totally disagreeing or showing slight neutrality. This suggests that personal motivation is not a significant factor for these wineries in considering wine-tourism. Regarding "Increase income, there was a mix of slight agreement and neutrality, with no strong consensus. "Make income more stable" saw responses indicating slight agreement or neutrality, showing that some respondents see potential stability benefits, though it is not a strong motivating factor.

Seeing the figure 28, for "Reduce risk", most responses were towards disagreement, indicating that reducing risk is not seen as a primary benefit of enotourism by these winery owners. Also like "Access to funding" were largely negative, suggesting that owners do not believe enotourism would significantly enhance their funding opportunities. "Increase the value of my company" received some agreement and neutrality, indicating some recognition of potential long-term value increases, but not as a strong motivator for many respondents. "Make the best use of company spaces" saw mostly disagreement, suggesting that optimizing space usage through enotourism is not a key consideration for these wineries. "Employ my family", got a good level of disagreement, indicating that family employment is not a significant factor for most respondents when considering enotourism.

Statement	Mean	Standard Deviation	Minimum Value	Maximum Value
Personal motivation	3.00	1.15	1	5
Increase income	3.00	1.00	1	4
Make income more stable	2.00	1.00	1	3
Reduce risk	3.00	1.00	1	4
Access to funding	2.00	0.87	1	3
Increase the value of my company	3.00	1.00	1	4
Make the best use of company spaces	3.00	1.00	1	4
Employ my family	3.00	1.73	1	5

Figure 28: Agreement degree of these sentences (author's elaboration)

While in the figure 29 for "Rationalize the use of company labor" and "Enhance the skills of the staff", responses were primarily negative, indicating that this is not a key motivating factor for introducing eno-tourism. The sentences "Promote direct sales" and "Increase valorization" both saw slight agreement from a minority of respondents.

While "Increase brand awareness", "Increase customer loyalty", "Leverage the company's location", and "Improve product image" saw some positive responses, indicating that some owners recognize the marketing and branding benefits.

Statement	Mean	Standard Deviation	Minimum Value	Maximum Value
Rationalize the use of company labor	2.00	1.00	1	3
Enhance the skills of the staff	2.50	1.12	1	4
Promote direct sales	3.00	1.15	1	4
Increase valorization	3.00	1.73	1	5
Increase brand awareness	3.00	1.15	1	5
Increase customer loyalty	3.00	1.00	1	4
Improve product image	3.00	1.00	1	4
Leverage the company's location	3.00	1.00	2	4

Figure 29: Agreement degree of these sentences (author's elaboration)

Overall, the data suggests that while there are various potential benefits to introducing enotourism activities, winery owners without such activities are generally skeptical, with most showing low levels of agreement with the motivating statements. This contrasts with responses from wineries already engaged in wine-tourism, who demonstrated higher levels of agreement with similar motivations.

5.0 Discussion

The results of this research provide a detailed overview of the diversification of wineries in Valpolicella towards wine tourism, highlighting numerous demographic, motivational, and operational aspects. The data, collected through a questionnaire distributed by the Consorzio Tutela Vini Valpolicella, revealed that the average entrepreneur involved in wine tourism is typically a fifty-year-old man, university-educated, who inherited the business from his parents and works full-time within the winery.

The comparison with ISTAT data shows that wineries engaged in wine tourism in Valpolicella tend to have owners with higher educational qualifications than the broader agricultural sector. Specifically, a much larger proportion of these owners hold a bachelor's degree (52.9%) compared to the 9.1% observed in the general agricultural population according to ISTAT data. This suggests that wine tourism requires more advanced skills and knowledge, which are obtained with higher education levels. The higher educational in the wine tourism could provide to who works in this sector the necessary tools and networks to successfully manage this specialized business activity.

The surveyed wineries in Valpolicella are primarily small to medium-sized family-owned businesses, reflecting a strong tradition of familial involvement in wine production. These wineries typically have an average of 10 to 20 employees, with a significant proportion of the workforce composed of family members. The number of hectares owned varies, with many wineries owning between 5 and 15 hectares of vineyards and it is not often the renting of additional land to expand their production capacity. On average, the respondents have two to three children, in 5 wineries the owner's sons work ensuring the continuity of family management. The primary markets for these wineries are abroad, the national sales are the second market accounting the 20-40% and the 0-10% range of sales in the most of the wineries. While the province and the regional sales are, in average, around the 0-5%, meaning that this kind of wine have a more success at a international level than in the area where it is produced.

There may be a direct connection between wine tourism and export growth this is because wine tourism not only allows for direct exposure of the wine to visitors, including international tourists, but also facilitates indirect promotion through word-of-mouth. By engaging visitors firsthand and offering memorable experiences, wineries can enhance their brand visibility and reputation, potentially leading to increased export opportunities as satisfied tourists share their positive experiences with a broader audience. This dual benefit highlights how wine tourism can serve as a strategic tool for expanding both domestic and international market presence.

The focus of their production is mainly on high-quality wines indeed only the 5,9% of the wineries produces wine without denomination; this reflect the unique terroir of Valpolicella, with a strong emphasis on traditional grape varieties and winemaking techniques. Talking about organic wine the bigger part of the companies interviewed are not interested to produce it.

These entrepreneurs have chosen to diversify their activities mainly by including guided tours of the wineries, wine tastings and visit of the vineyards because nowadays there is a higher demand of these activities. The main motivations for diversification into wine tourism include seeking new personal stimuli and challenges, leveraging the natural beauty of the surrounding area, creating a deeper and more personal connection with customers, building a more loyal customer base through direct and engaging experiences, integrating sensory experiences that increase the perceived value of the wines, and expanding brand visibility and recognition.

However, some motivations had a negative agreement degree or did not yield the expected benefits. For instance, the assumption that wine tourism would significantly increase and would be an access point for sources of founding was not universally realized. Also, the motivation to be a way to employ the family members, to increase the staff motivation and to optimize the company spaces and the staff labor did not have a great consensus.

Conversely, some wineries have chosen not to diversify into wine tourism. The reasons for this decision include a focus on traditional wine production without the added complexity of managing tourism activities. This kind of wineries perceive the initial investment costs and ongoing operational expenses, indeed a lot of them are in disagree with the motivation of: reduce the risk, optimize the use of the company spaces and enhance the skills of the staff. There are also concerns about the impact on the quality of their core wine production activities and a preference to maintain a more private and controlled business environment. To enhance wine tourism in Valpolicella, a well-rounded strategy is key. This involves offering training to improve hospitality skills, providing financial support for upgrading facilities, and running targeted marketing campaigns to showcase the region's unique wine experiences. Developing enticing tour packages that include local attractions, upgrading visitor amenities, and encouraging collaboration among wineries will also make a big difference. With these steps, Valpolicella can firmly establish itself as a top destination for wine enthusiasts.

In this situation we can see a correlation between the decisions of diversification and the age and the background of the owner. In fact, it is evident that older owners with lower levels of education tend to be more resistant to diversifying their businesses due to a combination of experience and risk aversion. However, the percentage of wineries that choose not to engage in wine tourism is quite small. This indicates that market demand plays a significant role in driving owners to diversify into wine tourism, compelling even those who might be initially hesitant to adopt this strategy.

Diversification into wine tourism not only offers an additional source of income but also helps strengthen the bond with the territory, improve the economic sustainability of the businesses, and promote the local wine culture. Moreover, tourism activities can increase the visibility for the products, creating a memorable experience for visitors and increasing brand awareness. However, it is important to recognize the limitations of this study. The sample size, while representative, may not fully reflect the diversity of wineries in the surveyed area; in fact the number of wineries that have answered to the survey is limited. Additionally, the self-reported nature of the data collected through the questionnaires can introduce response bias, as entrepreneurs may have emphasized positive aspects or minimized difficulties.

Moreover, considering future developments in the wine tourism sector, it is important to consider the consequences if the motivations for wine companies to adopt wine tourism were

to change. If many companies engage in wine tourism primarily to generate additional income, a drop in demand could reduce profitability and lead to a decrease or cessation of tourism activities. This could negatively impact revenue streams and brand visibility. However, if companies see wine tourism as a strategy to optimize the use of labor and improve business operations, the situation may be different. In this scenario, wine tourism would be integrated into day-to-day operations, and a drop in demand could be mitigated by the benefits of more efficient management. Therefore, the resilience of the sector may depend on how companies perceive wine tourism: as a source of additional income or as a strategic element to improve their operations and long-term sustainability.

Future research could benefit from a larger sample size and diversified methodologies, such as qualitative interviews and direct observations, to get a deeper understanding of the dynamics in this sector. Moreover, future studies could further explore the impact of support policies, analyze the expectations and satisfaction of wine tourists to improve tourism offerings, and investigate how wine tourism practices can contribute to the environmental and social sustainability of wineries. In conclusion, diversification into wine tourism represents a promising strategy for wineries in Valpolicella. This study offers valuable insights for industry entrepreneurs and policymakers on how to further support and promote this segment, contributing to the economic and cultural development of the region.

6.0 Conclusion

In conclusion, this thesis aims to investigate the motivations driving wineries in the Valpolicella region to diversify into wine tourism. The primary focus was to understand why these wineries are incorporating tourism activities into their business and to identify the key factors influencing this decision. To achieve this, a structured questionnaire was distributed to the wineries through the Consorzio Tutela Vini Valpolicella, collecting data on both the personal attributes of the winery owners and the operational characteristics of their businesses.

The analysis of the collected data revealed that the typical winery owner in Valpolicella is a fifty-year-old male with a university education, who has inherited the family business. These wineries are predominantly small to medium-sized family enterprises with a significant international market presence. The study identified several key motivations for diversifying into wine tourism, including the opportunity to capitalize on the region's natural beauty, the desire to create more connections with customers, and the goal to increase brand visibility and loyalty.

These findings are essential for several reasons. Firstly, they provide valuable insights into the strategic decisions of winery owners, revealing that the integration of tourism activities can offer both personal and business benefits. Moreover, by creating unique visitor experiences, wineries can not only increase their revenue but also strengthen their relationships with the local community.

Secondly, the study highlights that while many wineries see significant value in wine tourism, not all anticipated benefits, such as increased funding and family employment, have been uniformly realized. This suggests that while wine tourism has great potential, it also presents challenges that need to be carefully managed.

The significance of this research extends beyond individual wineries, offering important implications for the broader wine industry and regional policymakers. Understanding the motivations and challenges associated with wine tourism can help in developing targeted strategies to support wineries in maximizing the benefits of this diversification. For policymakers, these insights can guide the creation of supportive policies and programs that help the growth of wine tourism, in this way contributing to the economic and cultural development of the Valpolicella region.

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