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WINE TRAVEL IN THE UNITED STATES: A PROFILE OF WINE TRAVELLERS AND WINE TOURS

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Gastronomy has always been a central part of the tourism experience but in recent years has become one the main motivations to travel for visitors to a particular destination. Wine tourism represents today a key component of this segment. This paper examines the profile of U.S. wine tourists interested in wine-related activities as well as U.S.-based tour operators offering wine holidays in order to gain a better understating of both wine tourism demand and offerings in the U.S. market. The comparison tries to highlight critical issues that may allow tour operators to enter successfully a market where consumers may tend to shy away from organized travels.

1. Introduction

The United States is both a leading tourism source market and destination. According to World Travel Monitor (IPK International, 2015), the U.S. is the world's second-largest outbound travel market behind Germany in terms of number of trips and the largest long-haul source market with 20% of all long-haul trips, mainly for leisure purposes. At the same time it is also the world's top destination in terms of international arrivals and revenue.

Many U.S. leisure tourists show an increasing interest in "authentic" trips and holidays, often seeking authentic, local, or off-the-beaten track, instead of traditional attractions. Among "authentic" tourist experiences, gastronomy tourism (also called culinary or food tourism) plays a big role and represents one of the main key trends in this market together with health and wellness, up-market and “multi-generational” travel (IPK International, 2015). Throughout this paper, food tourism” and “gastronomy tourism” will be used interchangeably.

As one of the most dynamic market segments in recent years, gastronomy tourism and gastronomy tourists have been deeply investigated in both industry and academic research. Recent industry research confirms the increasing participation in culinary and beverage activities of U.S. leisure tourists while travelling, which raised from 17% in 2007 (TIA and Edge, 2007) to 77% in 2013 (Mandala Research LLC “Mandala”, 2013). Although these studies' methodologies were not identical, the results suggest that a larger number of tourists are intentionally looking for food experiences.

The growth of food tourism in U.S. is strictly linked with the rise of interest in food and beverage. According to Sloan (2013), American adults enjoy talking about food, purchase speciality food for everyday meals and regularly watch cooking shows on television. It is not surprising that about 48 millions of American adults define themselves as foodies, who are people having an ardent or refined interest in food and beverages (Packaged Facts, 2015).

Tourism intermediaries (such as travel agencies and tour operators) have recognized the importance of gastronomy in travel and have developed specific experiences. In 2012 the annual survey of United States Tour Operator Association (USTOA) indicated that more than half of respondents (53%) planned to offer new "experiential" travel programs in that year, and culinary (and beverage) tours were at the top of the list (USTOA, 2012). As shown in this paper, some U.S. based tour operators have begun to create specific gastronomic tours and itineraries in order to meet new customers' needs, providing a large variety of experiences and activities.

This paper aims at analysing the profile of U.S. leisure travellers interested in wine activities while travelling as well as U.S. tour operators offering wine tours and packages, gaining a deeper knowledge of both wine tourism demand and offerings in the U.S. market. Therefore, it provides the unique contribution of presenting both demand and supply aspects of wine tourism.

First, we present data on importance of wine to the U.S. leisure tourists demonstrating the level of involvement in planned activities, with particular regard to food and beverage tours and winery/wine trail visits. Second, a summary of wine tours and packages that are offered in the U.S. market is presented, allowing us to make comparisons and recommendations.

2. Literature review

Academic literature has begun to pay attention to gastronomy tourism at the beginning of the last decade (Long, 1998 and 2004; Hjalanger and Richards; 2002; Hall *et al.*, 2003) providing a fertile background for further development. A great majority of the research has occurred in the past ten years (Robinson & Getz, 2014). This literature review provides a brief overview of food tourism and wine tourism, focusing on their definitions.

Several definitions of gastronomy tourism have been provided emphasizing both the overall experience and the way it has manifested itself in destinations. Long (1998: p.21) defines culinary tourism as “the intentional, exploratory participation in the foodway of an Other”. Gastronomy tourism has also been defined as the desire to enjoy food experiences (Hall *et al.*, 2003; UNWTO, 2012; Getz *et al.*, 2014), a mean to access to cultural heritage (Santich, 2008) or simply “food and drink motivated travel” (Everett, 2016: 11).

Wine tourism has become a key component of this segment of tourism in the last decade. Wine tourism can be defined as “visitation to vineyards, wineries, wine festivals and wine shows for which grape wine tasting and/or experiencing the attributes of a grape wine region are the prime motivating factors for visitors” (Hall *et al.*, 2000, p.3). However Getz (2000) suggested that there are three major perspectives on wine tourism, namely that of producers, destinations and tourists. Thus, according to Getz and Brown (2006: p.147), this tourism activity can be considered simultaneously “a form of consumer behaviour, a strategy by which destinations develop and market wine-related attractions and imagery, and a marketing opportunity for wineries to educate, and to sell their products, directly to consumers”.

At the same time a number of commissioned market research studies have been conducted providing similar definitions, focusing on both tourists’ activities and their motivations. A gastronomy tourist can be defined as a person who has intentionally participated in a food and/or drink experience while travelling as well as a person who has been motivated to travel for food/drink experiences (TAMS, 2001; Spark et al., 2005; TIA and Edge, 2007; Mandala, 2013; Stone and Migacz, 2016).

The analysis of food and wine tourism (and tourists) should therefore consider both academic literature and market research. For example, Wolf (2014) identified key elements from academic literature that constitute a useful (even if not exhaustive) starting point both for researchers and tourist operators interested in gaining a better comprehension of food and wine tourists behaviours: age, distance, gender and marital status, nationality, education and income, previous travel experiences and clustering. In addition, he highlighted the need for market research to be matched with field research in order to test products and experiences offered and assess the effectiveness of activities, communication messages and methods. In addition, acquiring a thorough knowledge of food and wine tourism (and tourists) also allow intermediaries to satisfy a target market that frequently prefers to make their own travel arrangements (Croce and Perri, 2010). Travel agents and tour operators serve as both distribution channels and image creators and thus they need increasingly a specialised knowledge in order to meet several tourists’ wants and needs. This study pairs attributes of the American wine tourist with attributes of wine tours currently offered.

3. Methodology

This paper identifies the attributes of American travellers participating in wine tourism using a nationwide survey of leisure travellers, as well as an analysis of United States tour operators that offer wine tours. Therefore, two different sets of data are utilized.

Data concerning the profile of U.S. leisure travellers come from an online survey on food travel experiences with the purpose of obtaining a broad picture of the food travel landscape. The survey was distributed by an international survey research company to a panel of individuals designed to be representative of the American leisure traveller. Respondents (n=570) were at least 18 years old and had taken at least one overnight trip (with a minimum distance of 80 km/50 miles) in the previous year.

Data concerning wine tour operators was collected through a content analysis of the websites listed by "Wine Marketing & Tourism Conference" annually organized by Zephyr Conferences. The list is one of the most complete, although it cannot be guaranteed to be representative of the all U.S. wine tour operators. The analysis was carried out from October to December 2015. A total of 109 tour operators offering at least 1 wine tour were considered.

4. Results

Analysis of U.S. wine tourists

American tourists are more and more attracted to food and beverages activities while travelling, as assessed by several studies carried out in the last decade (TIA and Edge, 2007; Mandala, 2013). Stone and Migacaz (2016) confirmed the growing interest towards food tourism and found that 95% of American leisure tourists had participated in unique food or beverage activities while travelling in the last two years. About three-fourths of travellers had been motivated to take a trip or visit a destination because of a food or beverage activity.

Of the 570 respondents, 31.4% had taken part in at least one wine experience within the past year. In this study, these individuals are identified as "wine travellers" – that is leisure travellers who have participated in a wine travel experience within the past year. Table 1 provides more information about wine travellers.

Table 1. Overview of American wine travellers.

	U.S. Leisure Travellers (n=570)	**U.S. Wine Travellers (n-179)**
All U.S. Leisure Travellers	31.4%	100%
Generation		
Silent	5.5%	7.4%

Boomers	29.8%	20.5%
Generation X	30.7%	40.3%
Millennials	34.0%	31.8%
Gender		
Male	45.5%	46.6%
Female	54.5%	53.4%
Annual Household Income		
$100,000+ USD	30.0%	38.2%
Under $100,000 USD	70.0%	61.8%
Level of Travel		
Taken 5+ Overnight trips in past year	37.5%	50.9%
Travelled internationally in past 2 years	44.5%	61.4%

The data shows that wine travellers tend to be wealthier and more experienced than other leisure travellers. In particular, over 60% of wine travellers have travelled internationally in the past two years, and over half have taken at least 5 overnight trips in the past year. A larger percentage are also in a higher income bracket (annual household income over $100,000 USD).

However, part of these results may be explained by the age of wine travellers. Of the three major generational cohorts in the United States, Generation X has the highest percentage of wine travellers. Because of their age, it is reasonable that many Generation Xers would have a higher income than younger individuals (Millennials) or Boomers (many of whom may have retired).

It is useful not only to identify demographic characteristics of wine travellers, but also psychographic characteristics. The International Culinary Association (ICA), now the World Food Travel Association, defined 13 PsychoCulinary profiles, accordingly to a segmentation analysis (ICA, 2010). Each PsychoCulinary profile reflects how tourists are motivated to make food and beverage experience decisions. For example a person may be a “budget” or “gourmet” food traveller.They may seek also seek “authentic” or be “experimental” in their tastes. These profiles reveal that it is not possible to define a typical food tourist but there is a great variety (ICA, 2010).

In this study, U.S wine travellers were asked which three profiles they identified with most closely. The most common profiles were: eclectic, authentic, and localist (Table 2). Results revealed that wine travellers enjoy a wide variety of wine as well as food experiences, particularly those that are perceived to be local or authentic. Thus, we cannot assume that all wine travellers would enjoy the same experiences. Such findings also suggest how travel and wine experiences can be effectively paired together to appeal to a range of traveller segments.

Table 2. Most common PsychoCulinary profiles among wine travellers.

Profile	Description	%
Eclectic	Travellers seeking a wide variety of food and drink experiences – a little bit of everything	54.7%
Authentic	Travellers preferring “authentic” food and drink, prepared according to the recipes and traditions of the region	42.5%
Localist	Travellers seeking locally-owned and operated restaurants and bars	40.8%

Respondents could identify with up to three PsychoCulinary profiles

Table 3 reveals that U.S. wine travellers participated in many unique food and beverage activities. Many experiences focused on wine, and there is a major difference between the wine travel experiences. In particular, over three-fourths of wine travellers have visited a winery or wine trail, but less than one-fourth of all leisure travellers have. This indicates that wine travellers are likely a unique market segment with specific characteristics, as also stated in other previous analysis in several countries (Dodd & Bigotte, 1997; Mitchell and Hall, 2001; TAMS, 2001).

Table 3. Percentage of Travellers who participated in each experience while travelling in the past year.

	U.S. Leisure Travellers	U.S. Wine Travellers
Visited a wine experience (winery or wine trail)	24.4%	77.7%
Attended a wine festival	14.7%	46.9%
Participated in a food/ beverage tour of a destination	14.4%	27.9%

These findings confirm that wine (and food) activities are not ancillary experiences. Tasting, experiencing and purchasing local gastronomy allow tourists to approach local culture in a more experiential and participative way (UNWTO, 2012). However, cultural heritage remains attractive to these tourists, as almost of U.S. wine tourists are likely to be sightseeing and visiting historical and cultural attractions, including museums, while enjoying a wine (and food) holiday. The data showed that 93% of wine travellers were likely to go sightseeing, 85% were likely to visit historical or cultural attractions, and 81% were likely to go shopping, 66% were likely to attend major events (e.g.

sporting events, festivals), and 60% were likely to attend performing arts events.

Analysis of U.S. wine tour operators

The number of U.S. wine tour operators considered in this analysis is 109, offering 545 food and beverage packages and tours. Although the sample is not representative of all tour operators in this market, the analysis offer a wide and insightful overview of their offerings. Half of tour operators are located in California, one of the most famous wine regions in the United States accounting for nearly 90% of American wine production (Stevenson, 2007).

Concerning the destinations offered (Table 4), the United States ranks at the most frequent destination, confirming the positive impression of the U.S. as a food and beverage destination. Most of tours operators offer packages and tours in California (e.g. Napa Valley and Sonoma) and Oregon (e.g. Willamette Valley). International popular destinations are France (8%), Italy (8%) and Spain (3%). Tour operators also showed interest in South American countries – especially Argentina and Chile –, which are attractive thanks to their long viticultural history. These offerings "pair well" with American travellers perceptions of food travel destinations. According to Stone and Migacz (2016), California ranks 2nd among the most attractive up-and-coming destinations for U.S. food (and wine) travellers while Italy is the only foreign destination cited.

Table 4. Country of destination of F&B packages and tours offered by U.S. Tour Operators.

Destination	Percentage of tours with this country as a destination
United States	72%
France	8%
Italy	8%
Spain	3%
Argentina	1%
Chile	1%
Portugal	1%
New Zealand	0,7%
South Africa	0,7%
Australia	0,5%
Other countries (Austria, Canada, Hungary, Belgium, Croatia, Czech Republic, Germany, Greece, Peru and Slovenia)	Less than 0,5%
TOTAL	100%

Comparing the destinations with the characteristics of tours allow us a better understanding of U.S tour operators (Table 5). The study indicates a large popularity of daily tours (69% of the total amount with destination U.S.), confirming the increasing interests of U.S leisure tourists in short and authentic trips. Tour operators also offer long-haul trips to France, Italy and Spain.

Table 5. Country of destination and length of F&B packages and tours offered by U.S. Tour Operators.

Destination	Length	Percentage
UNITED STATES	Daily Tours	69%
	Short-Length Tours (2-3 days)	4%
	Medium and Long-Length Tours (4-20 days)	10%
	NA	17%
	TOTAL	*100%*
FRANCE	Daily Tours	7%
	Short-Length Tours (2-3 days)	26%
	Medium and Long-Length Tours (4-20 days)	63%
	NA	4%
	TOTAL	*100%*
ITALY	Daily Tours	7%
	Short-Length Tours (2-3 days)	2%
	Medium and Long-Length Tours (4-20 days)	81%
	NA	9%
	TOTAL	*100%*
SPAIN	Daily Tours	6%
	Short-Length Tours (2-3 days)	6%
	Medium and Long-Length Tours (4-20 days)	76%
	NA	12%
	TOTAL	*100%*

In Tables 6 and 7 we focus our attention on typology and activities offered. While wine tourists may have general attributes in terms of being experienced travellers, there is not evidence that they are a homogeneous group, especially in terms of gender and age. Therefore tour operators may like to create valid itineraries for different targets and offer personalised services (Croce and Perri, 2010). The analysis show a wide range of experiences proposed, often including different activities.

Among the tours (Table 6), 70% are “traditional” guided tours with bus and cars. Limousine and jeep tours are quite popular (respectively 3% and 2%). Some tour operators create specific offer for niche segments, such as bikers (11%), hikers (3%) or other people interesting in sport activities (1%), or offer unique experiences on train (2%) and riverboats (1%).

Table 6. Typology of F&B tours and packages offered by U.S Tour Operator.

Typology	Percentage
Guided bus tour	49%
Guided small buses & car tour	21%
Bike Tour	11%
Guided Limousine Tour	3%
Walking/Trekking Tour	3%
Guided Jeep Tour	2%
Train Tour	2%
Riverboat tour	1%
Tour including sport activities (e.g. rafting, kayaking)	1%
NA	8%
TOTAL	*100%*

The most popular tour activities (Table 7) include tastings (97%) and visits to wineries (90%). This supply matches demand, as these compare to the most popular activities for American wine travellers (Table 3). Other activities include visits to cultural and environmental attractions (24%) and unique dining experiences (19%) are less popular since most of tour operators offer only daily tours. Considering only tours and packages with destination Italy, we immediately notice that tour operators usually combine gastronomic with cultural activities and propose a larger variety of experiences, such as cooking classes (47%), dining at famous restaurants (47%), visits to agricultural producers (23%) and other F&B activities (16%), such as truffle hunting.

Table 7. Activities offered in F&B themed packages of U.S Tour Operator.

Activities	Percentage (all destinations)
Tasting local wine and food	97%
Visits to wineries	90%
Visits to cultural and environmental attractions	24%
Unique dining experiences at restaurants	19%
Other activities	12%
Cooking classes/courses	10%
Visits to agricultural producers	7%
Visits to breweries	4%
Other F&B courses	3%

Other F&B activities	3%

5. Discussion & Conclusion

Although wine tourism can be considered a relatively recent industry (Byrd et al., 2016), it is a fast growing and financially lucrative segment across United States. Wine-related activities are no longer complementary experiences but they are a key element for a segment of American leisure tourists, who are defined here as “wine tourists. It is therefore important to gain a deeper understanding of both tourists’ needs and wine tourism offerings, in order to understand how they can be effectively paired together.

There is no singular type of wine tourist, but American wine tourists are often are well travelled and from a relatively high socioeconomic status, confirming findings from other previous studies (Mitchell and Hall, 2001; TAMS 2001; Bruwer, 2003; Cohen & Ben-Nun, 2009; Byrd et al. 2016). While travelling, they are more likely to participate in wine (and food) activities, mainly visits to wineries, wine festivals and events, and wine-related tours. U.S. wine travellers thus seek not only unique experiences but also a large variety of, showing a need for variety and new sensations. Such findings are confirmed by the analysis of psychographic characteristics, which also highlight their desire for proposals that are perceived to be local or authentic. These proposals add value to tourism experience and thus stimulate wine travellers to pay a premium.

The data on wine tours currently offered seem to indicate that the destinations and attractions coincide with wine tourist demand. However, there are opportunities to ensure that wine offerings are suitably authentic and local. Another key finding is that wine travellers tend to see themselves as having “eclectic” tastes, which indicates that wine should only be one element of wine tours—a variety of food and drink offerings should be provided.

It is therefore important for tour operators to address a number of issues if they aim at attracting and satisfy wine (and food) tourists, which tend to shy away from organized travels (Croce and Perri, 2010), The analysis of wine tourists operators shows an increasing capacity to adopt a “multidisciplinary” approach and create itineraries for different targets (e.g. daily visitors, leisure tourists, sports tourists) often combining gastronomy, cultural and other activities also in a personalized way.

Although the sample is not representative of all tour operators operating in U.S. market, the analysis tend to confirm the intention of U.S. tour operators to recognize the importance of food in travel and celebrate authentic culinary experiences (USTOA, 2012). However, the analysis also highlights a lack of augmented offerings, including additional elements (e.g. socializing, meeting locals, and sightseeing) that can reinforce the tourism experience, allowing travellers to have a localized experience while experiencing wine culture in a more participatory way.

To conclude, future research is required to investigate a more representative sample of U.S.-based tour operators and extend the analysis to other elements (e.g. marketing and promotional activities) in order to better understand the coherence between customers' needs and tourists proposals and highlight critical issues that allow U.S. tour operators to enter the market successfully. This research could also be extended to other countries in order to better understand how tour operators can improve their food and beverage tour offerings.

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