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Wine Destination Offered as a Brand – Enotourism in Chile

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Abstract: *Chile is seen as a wine-producing giant from New World Wine, and so its brand as a destination is nowadays mostly associated with nature and then with wine. As a country of wine for incoming tourists, it can offer even more connection to wine due to the superior qualities of its history, culture, and nature. Enotourism is a trend that could explicitly produce the next wine tourism destination, among other things. This paper aims to determine the state of the art on the supply side (wineries) for wine tourism and to find out the extent to which winemakers offer wine services in their winery in a particular wine destination. The field research was conducted in one of Chile´s wine-producing regions: Maule Valley. Semi-structured interviews, followed by the processing of the obtained data, constitute the main source base. This paper also proposes possible recommendations for the wine destination brand of Maule Valley.*

1. INTRODUCTION

Wineries entering the tourism sector must inevitably adapt to the new role of a service provider, although the integration of wine and tourism by combining agricultural values with guest service values is not easy to achieve. However, entering the tourism sector is a demanding challenge for wineries as it constitutes a redirection from the usual way of running a business. Opening the winery to visitors is a marketing tool to increase direct sales, but it also represents a diversification strategy for the winery's activities – the provision of tourism services. Thus, it provides a significant space to promote innovation and boost business growth. At the same time, as a thriving niche tourism business, it can provide an effective way to enrich the (regional) tourism product and respond to the visitors' changing interests. It includes the overall goal of strengthening the attractiveness and competitiveness of the destination (Getz, 2000; Mancino and Lo Presti, 2012) but also the tourists' experience, perspective, and loyalty (Králiková et al., 2021; Zamora and Bravo, 2005). At destinations where grapes are grown for wine, visitors can get acquainted with the cultural and historical heritage of the region. They meet people with similar preferences and interests and participate in other activities related to wine, which are combined into wine tourism (Kubát, 2019).

Enotourism, as wine tourism is often called in Chile, is an important factor in regional development. It contributes not only to the creation of local jobs and the promotion of local goods but also to attracting investment and other forms of tourism at the regional level (Figueroa and Rotarou, 2018; Mitchell and Hall, 2006). The development of enotourism in Chile should also be considered as a direct channel of wine marketing. Even the environment itself remains a challenge for the development of this type of tourism. In general, there is no local culture that values wine tourism activities and the related behavior of the actors in the wine regions. And international promotional activities are not promoted by the wine-producing regions, but only by the wineries themselves, especially the large ones (Kunc, 2010; UNWTO, 2016). Even though wine tourism in Chile has a seasonal disposition (Transforma Turismo, 2016; von Bennewitz and Kubát, 2017),

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there are still winery activities (the wine sector in general) that take place throughout the year, but new services and quality improvements are still needed in the tourism sector (Figueroa and Rotarou, 2018). In addition, the current level must be maintained, which is a prerequisite for further development and concurrently difficult to achieve since the occurrence of COVID-19.

The wine sector (Vini/viticulture and wine production) and tourism sector are perceived as natural partners. From an economic point of view, both sectors face fierce competition (von Bennewitz and Kubát, 2017). As noted by Figueroa and Rotarou (2018) in the currently saturated Chilean wine market, dominated by large producers, smaller wineries are left behind. This is especially true in emerging wine destinations. These regions need local (regional) markets, so-called "cellar door sales", a story they can tell, uniqueness, and other destination differentiators, among other things. These are necessary to build up brand awareness and increase sales (Brunori and Rossi 2000; Tomljenović, 2006). For emerging (wine) tourism destinations blessed with the presence of wine production, the destination wine brand can also be a catalyst for regional economic development. For more established wine-producing regions, on the other hand, it is a tool for improving the image of the destination and diversifying into new market segments (Getz 2000; Tomljenović, 2006). The regional wine brand is especially important to new wineries, as well as new wine destinations, as they need more time to expand their own image and make it recognizable among consumers and other wine producers (Johnson and Bruwer, 2007). As the name of this paper refers, Chilean wineries usually place more importance on the promotion of their wine brands or wineries than their wine regions or even the whole country as a wine destination. Chile presents wine tourism in a different way of thinking than the Old World Wine countries (Kubát, 2019). It could be said that the export of Chilean wine is the main activity after the wine has been produced and prepared for sale. Hence, this paper aims to identify the state of the art on the supply side (wineries) for wine tourism and related activities and to find out the extent to which winemakers themselves offer wine services in their winery. This area of research is in its scarcity in other places than only Chile (Figueroa and Rotarou, 2018; Johnson and Bruwer, 2007). The paper will also propose recommendations for the wine destination in a way of perception as a wine brand.

2. BACKGROUND

Chile having a young history regarding enotourism should be acknowledged when comparing it to other much more developed wine markets in the Old World Wine countries. Enotourism was first officially introduced in Chile in 1996 when the Colchagua Wine Route (la Ruta del Vino de Colchagua) was developed. In 2015, there were over 334 wineries in the country, of which only 64 were able to offer wine tourism services (Aravena, 2015; Figueroa and Rotarou, 2018). Several wineries have stopped offering wine tourism services, partly because of low demand and partly because of the earthquake on 27 February 2010, which destroyed buildings and facilities (i.e., Zareian et al., 2012). The wine sector provides about 300,000 jobs per year and operates 334 wineries, 95% of which are export-oriented and reach 160 countries (Aravena, 2015). The Chilean wine industry is still dominated by a few family-based companies, with the four largest groups accounting for more than 45% of export value, also with the increasing participation of foreign capital in the sector (Cusmano et al., 2010).

In 1994, Act No. 464 was created by the Ministry of Agriculture on wine zoning as well as the standard for its use. This law was amended on 25 September 2015, which divided the country into 6 regions, 17 sub-regions (valleys), 8 zones, and 81 areas (Contreras, 2018; Figueroa and Rotarou, 2018). The main vine-growing valleys are provided in Figure 1. The purpose of these vine-growing areas is to protect the consumer and manufacturer from imitations. This is done to ensure an authentic and quality product, protecting the reputation of the product to improve its marketing at the national and international level and stimulate manufacturers with innovative ideas (Contreras, 2018).

The origin of wine according to each of the production valleys is recognized by the Denomination of Origin (D.O.)[2] (Mena and Moreno, 2014). Climatic conditions in different areas of Chile vary, so each of the valleys has its own characteristics, allowing the wines to have different organoleptic properties. In the central zone, wine is an indispensable asset for the development of tourism, as it is another product that is processed in Chile over a large area between the valleys of Aconcagua and Bío-Bío (Contreras, 2018). The concept of *terroir* is a complement of the D.O. system and supports the wine culture. Both are an essential component of wine quality with wine tourism. Therefore, it is expected that the commitments to brand names, images, and destinations are consolidated in a wine-producing destination where consumers have gained memorable experiences at vineyards and wineries. Creating such a level of loyalty that the purchasing of a product would remain an even price may have essentially risen. The setting up of significant rural tourism services based upon wine-making is the current paradigm for Chile as a wine exporter (Zamora and Bravo, 2005).

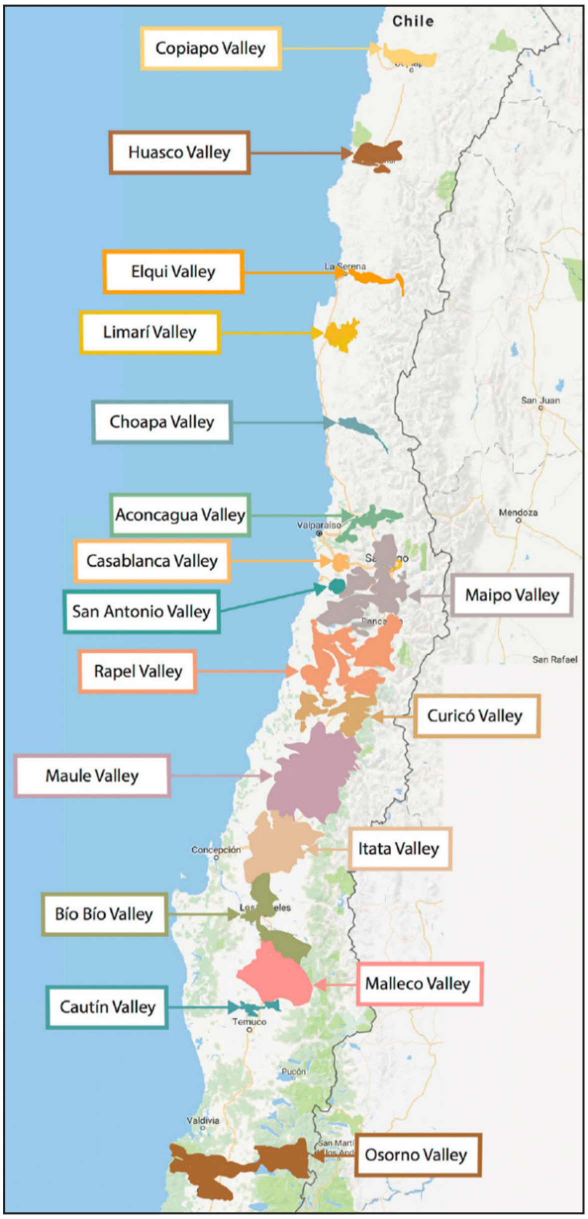

Figure 1. Map of the 17 wine-producing valleys situated in Chile
Source: Figueroa and Rotarou, 2018

The Maule wine region (Región vinícola del Maule or Valle del Maule), or respectively the Maule Valley, is located in central Chile, bordering the Pacific Ocean to the west and Argentina to the east. It is also an area with a higher percentage of the rural population in Chile (35.5%) (Mena and Moreno, 2014; von Bennewitz et al., 2015). The largest Chilean vineyard areas are located in the Maule Valley. There is great variability of characteristics in this region in terms of the size of the producers. On one hand, some particularly small producers cover less than a single hectare, whereas some large producers cultivate extensive vineyards (von Bennewitz and Kubát, 2017). The difference is then noticeable both in the type of wine production and in the type of market they focus on. For small producers, their business is local trade only, while large

[2] The designation of origin or Denominación de Origen (D.O.) gives the identity of the vine-growing region by preserving the origin of the wine. It cannot be assigned to a product that was made in another region (Contreras, 2018).

producers function mainly in terms of export (Mena and Moreno, 2014). The evolution of wine production and the wine export volume of the Maule Valley show a high correlation to what happens at the national level, which is explained by the fact that this region represents 49% of the national wine production (Rojas Aguilera, 2015).

3. MATERIALS AND METHODS

The research was conducted in collaboration with colleagues from the Catholic University of Maule (Universidad Católica del Maule, Chile) in 2018. Suitable locations for data collection within the Maule Valley were processed. The initial intentions of the two parties united in the project led to the strengthening of the collaboration and MOU (Memorandum of Understanding) of both universities. This paper is mainly based on secondary data (Contreras, 2018; Muñoz 2018). The field research and interviews were conducted with eleven wineries (N=11) located in the Maule Valley. Semi-structured interviews with the chosen wineries were conducted. The datasets of the interviewed wineries with their more detailed information can be seen in Table 1.

Table 1. List of interviewed wineries in the Maule Valley

Winery number (n)	City of the winery	Wine valley	Vineyards owned (ha)	Wine production (liters/year)	Primary activity
1	Pencahue	Maule	<50	3,000	enotourism
2	Talca	Maule	50-100	1,500,000	wine production
3	San Rafael	Maule	301-400	4,500,000	wine production
4	San Clemente	Maule	11	n/a	wine production
5	Curicó	Curicó	1030	n/a	wine production
6	Sagrada Familia	Curicó	300	10,000,000	wine production
7	Sagrada Familia	Curicó	64	n/a	wine production
8	San Javier	Maule	300	3,500,000	wine production
9	San Javier	Maule	850	20,000,000	wine production
10	San Javier	Maule	100	40,000	wine production
11	San Javier	Maule	237	2,670,000	enotourism

Source: own collaboration adapted from Contreras, 2018; Muñoz, 2018

In the administrative province of Talca, three wineries were interviewed (n=1, 2, 3), plus one winery (n=4) that, although not associated with the wine route, provides wine tourism services. Another three wineries (n=5, 6, 7) associated with the wine route were surveyed in the administrative province of Curicó. Only two of them provide official tourist services. The third winery also receives tourists as part of the route and has wine sales in its facilities but does not have the infrastructure as such to develop a tourist business. In the administrative division of the province of Linares, the last four wineries (n=8, 9, 10, 11) located in the municipality of San Javier were interviewed. Territorially by administrative divisions, the wineries located in the provinces of Curicó, Talca, and Linares fall under the Maule Region.

4. RESULTS AND DISCUSSION

4.1. Wineries and services extent

This field research was carried out with wineries linked to the wine route (N=7), as an attempt to diversify production and to support wine sales. But also with those not linked to the wine route (N=4) who mainly focus on the sale of the wine itself and the expansion of their business, with no further complementary products or services. Figure 2 shows the designation of a winery located on a wine route in the Maule Valley as Chile's leading wine-making region. It's run by a small group of local wine producers. The emphasis is on routing their various winery members, wine tasting, and selling the various vintage wines. Local tourism attractions have been gradually added to the route. The wineries interviewed in Table 1 present great wine companies known around the world as well as smaller, family-owned wineries. It seems remarkable that two out of eleven wineries mentioned that their primary activity is enotourism and not wine production. However, in much of the research on motivations to visit a winery or wine region, the wine has not ranked in the top positions either (Carlsen and Charters, 2006; Sekulić et al., 2016), except for the North Carolina wine region (Byrd et al., 2016). All activities are primarily associated with wine, or the presence of wine is the prerequisite and basis for the subsequent development of tourist services leading to the creation of a touristic wine-producing region. The Maule Valley has done so by increasing its investment in wine facilities and promoting individual wineries throughout the region. The case of Margaret River is often cited as a successful example of the development of the region into a wine region (Hall et al., 2000; Kerma, 2018).

Figure 2. Designation of wineries located on the Wine Route in the Maule Valley.
Source: personal photo, 2018

Furthermore, wine tasting in Chile is viewed mainly as an "activity for rich people or foreign tourists" (Figueroa and Rotarou, 2018). In addition, as presented also by Sarturi et al. (2016), the concentration of wineries in the valley is low, which means visitors need to travel greater distances between particular wineries, and thus, disburse more.

This paper aims to find out to what extent winemakers themselves offer wine services in their winery, as was debated in the interviews. Thus, it has been found that service income can represent up to 30% of a winery's total income. However, this is the case for the large winery (n=5). In the case of the smaller wineries with this research, the share of service income is between 10-15%. As mentioned by the interviewed wineries, the involvement of services in the activities of the business is profitable or stagnant for most of them.

4.2. Destination, brand, and its development

As wineries proclaimed, analogously like Kunc (2010), in Chile, small- to medium-sized wineries place great emphasis on production factors such as consistent quality driven by improved winemaking practices and competitive prices. In other words, small to medium Chilean wineries are product-oriented and focus on where the producer or certain standards define the quality of the wine, not the market. This is also confirmed by Hall and Mitchell (2000). In Chile, wine tourism, as well as the wine sector (production), is dominated by large companies that have a larger area of vineyards and produce a larger volume of wine, which puts small producers at a disadvantage. Therefore, Mitchell and Hall (2006) point out that mutual support (between wineries) is necessary to strengthen the wine tourism sector and to achieve the coordination of the different wineries according to the relevant policies that promote areas related to wine tourism, the acquisition of traditions, cultural identity, and the creation of related economic activities. As also confirmed by Correia et al. (2016), there is a need for the wine and tourism industries to join efforts on a common goal, which is to provide unique experiences for the consumer. Aravena (2015) compared Chile with international wineries. In terms of the number of wineries open for tourism, as well as the number of visitors and level of promotion and development, Chile is relatively lower. The low interest of domestic tourists in wine tourism and the lack of wine culture were also confirmed by Inalaf et al. (2012), who analyzed Chilean society, where they found that the average citizen does not show interest in learning about their historical roots and their country/region. Therefore, as claimed by all the interviewed wineries, visitors to the winery are mainly foreigners who appreciate Chile as a quality wine producer and are interested in its origins. As also confirmed by Figueroa and Rotarou (2018), only one out of five tourists who visit wineries is Chilean. Therefore, Chile is the only wine-producing country with a much higher number of foreign visitors.

All wineries see more potential in developing Chilean services and wines to attract (not only) foreign tourists. In fact, this was mentioned by the winery (n=1): “Yes [it has potential], because of the tradition of rural grape cultivation, the quality of Chilean wines, and the large number of varieties that are produced.” However, another winery (n=4) adds that “there has been very little exploitation in wine tourism.” Chile has more potential to develop wine tourism, but there is a lack of links between wineries to offer more attractive tourism services and make it known to the public with its own identity. This is particularly true for the promotion of rural tourism, where the winemaking roots come from, and vine-growing in Chile in general. All wineries are cooperating or are involved in some way with institutions related to the promotion or development of tourism. The most frequent is a connection to the wine route, followed by the tourist office, Sernatur , the municipalities (Talca, San Clemente), Corporación Activa Talca , Corfo , or Sercotec . However, all wineries mentioned that cooperate in this area exhibit a low level. As contributed by one winery (n=6): “Everything related to wine tourism has the potential to develop.”

Several large wineries (n=2, 3, 5, 6, 7, 8) are located in the wine region that mainly focuses on the production of wine and international activities: export, wine competition, and the inflow of foreign tourists. They promote the region at the international level under the auspices of the Maule Valley signed by the wine label of Chile. Nevertheless, as also pointed out by Johnson and Bruwer (2007), there is still an imbalance between the relative strength of the regional wine brand and the producer’s own brand. This fact is also pointed out by the question asked in which area wineries recently invested the most money. Seven wineries answered wine production, three wineries answered infrastructure and the last-mentioned new production technologies. Hence, it is evident that the wineries focus on their own business and not on activating marketing on behalf of the destination’s image.

Figure 3. Word cloud of the wine development characteristics introduced by winemakers
Source: own collaboration at Wordart.com, 2021

The characteristics of the wineries and its valley, as well as the evolution of the wine destination according to the opinion of the interviewed winemakers, are as follows (graphically represented in Figure 3):

- quality wine,
- variety and quality of offered services,
- history, tradition, and culture of wine (production),
- promotion of their own wine brand,
- uniqueness – wine, brand, Chile,
- wine-producing facilities and conditions.

Referred to by Getz and Brown (2006), the attractiveness of the wine destination was mentioned as a key attraction for the region. In other words, tourists may choose to visit many wine regions. This creates competition with all of the other possible destinations. The popularity and rivalry of two wine-producing neighboring countries, Chile and Argentina, is still on board topic. These countries are located at a relatively short distance from one another. This creates a dilemma for many tourists in deciding which destination to choose for their visit. Is this due to marketing efforts or the general awareness of the wine destination? This question may lead to new research as Getz and Brown (2006) also corroborate. As Zamora and Barril (2007) pointed out regarding the attributes in deciding whether to purchase wine from Chile, the brand accounts for 25%, whereas the winery and wine region only accounts for 4%. This is due to unsuccessful marketing activities and strategies, which should, for instance, focus more on the characteristics mentioned in Figure 3 and not primarily on the production of wine, selling it abroad, and enhancing its own score. There are no doubts about the quality of the wine and its (sometimes overvalued) price. Nevertheless, there should be a higher accent placed on the other attributes of today's wine business, such as the wine services, the connectivity of wineries strengthened by its association to the wine region/country, and the winemaking history. In addition, the focus should be aimed at the so-called "soft skills" connected to wine propagation and tourism. A need exists for a wine branding campaign at a more regional level for wine destinations that aims to introduce the wine destination to the world as well as what distinguishes it from others (Johnson and Bruwer, 2007).

5. FUTURE RESEARCH DIRECTIONS

The growing interest in wine and related services is undoubtedly a new area of tourism definition. This relatively young type of recreation and leisure offers opportunities and potential in which reserves can still be seen. Due to the diversity in the interviewed wineries' strategies and the volume of their wine production, the results show merely a short insight into the situation and cannot be applied for the whole sectors of wine tourism, neither can they be generalized. Hence, as Chile is a huge wine-producing country, wine valleys, in particular, should be researched by the supply side and, for the appearance of the wine destination brand, separately, later to be compared aftward. The demand side also offers a great field for research, mainly in the area of tourists' preferences among wine products and services (primary and complementary) and their association to particular wine destinations as a choice of a wine brand.

6. CONCLUSION

As mentioned in this paper, Chile remains in the rather early stage of development in terms of enotourism. The level of wine production and quality of wine is increasingly high, however, there is a need to further present the product, not only strictly for export abroad but also at a local level. Generally speaking, wineries and wine destinations are quite far apart, and an opportunity exists to connect these places more through additional transport services. There is also the possibility of providing the wines offered by each winery in a single place, for example, at the entrance to the region or its core. The wineries should cooperate more with each other to bridge more than just the geographical distance between them. Development through deeper cooperation and collaboration in the creation of new tourism products is entirely appropriate. Generally, Chile should also focus on combining wine with its natural beauty and cultural diversification to create a genuine (international) wine tourism destination brand.

> *"The climate and soil of Chile are so similar to those of Europe that I see no difference, and in the whole discovery of America, no other region is so similar..."*

Alonso Ovalle, Chilean priest

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