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Wine travel in the United States: A profile of wine travellers and wine tours

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ABSTRACT

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 researches confirm the increasing participation in culinary and beverage activities of U.S. leisure tourists while travelling, which raised from 17% in 2007 (TIA and Edge, 2006) to 77% in 2013 (Mandala Research, 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.

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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.

1.1. Literature review

Academic literature has begun to pay attention to gastronomy tourism at the beginning of the last decade (Hall, Sharples, Mitchell, Cambourne, & Macionis, 2003; Hjalanger & Richards, 2002; Long, 1998, 2004) 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 (Getz, Robinson, Andresson, & Vujicic, 2014; Hall et al., 2003; UNWTO, 2012), 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, Sharples, Cambourne, & Macionis, 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 (Lang Research Inc., 2001; Mandala Research, 2013; Spark, Roberts, Deery, Davied, & Brown, 2005; Stone & Migacz, 2016; TIA and Edge, 2006).

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 & 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.

2. 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.

3. Results and discussion

3.1. 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 (Mandala Research, 2013; TIA and Edge, 2006). Stone and Migacz (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.

The data shows that wine travellers tend to be wealthier and more experienced than other leisure travellers. In particular, over 60% of

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%