



MASTER THESIS

WINE TOURISM DEVELOPMENT IN FORTIFIED WINE AREAS. CASE OF STUDY: MARCO DE JEREZ.

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ABSTRACT

The tourism sector is at a time of maximum relevance, although constantly changing. In Spain, tourism is currently the main service activity and is, therefore, a key sector of the country's economy. But beyond the mere economic or commercial stage, and within the cultural dominion, in gastronomic tourism (and, within it, in that of wine tourism), the regional promotion of a place is symbolized to the point of knowing whether it is a wine that describes and attracts tourists to land, or that land attracts the tourist towards its wine, its way of conceiving it, of doing so, of preserving it. The concept of wine tourism is based both on immaterial ideas, such as wine culture, as well as the quality of the product offered and its flavor. Wine routes have taken nature charters over the past few years to value multiple endogenous resources, establishing a stable wine tourism offer in a region. It is an offer to diversify both the field of agricultural production and tourism within the demarcation of the Appellations of Origin.

This study was conceived to evaluate the wine tourism concept within the Sherry Wine Route and also to understand the reasons for it to have arisen as the most visited official wine route in the country notwithstanding the low trend on fortified wine consumption. In the case of Jerez, the urban core has been formed by the development of the wineries and the development of the wine market was what gave way to the formation of the city.

Keywords: Wine Route, Fortified wine, Sherry wine, Marco de Jerez, Regulatory Council.

List of abbreviations:

ACEVIN: Asociación Española De Ciudades Del Vino (Spanish Association of Wine Cities)

MAPA: Ministerio de Agricultura, Pesca y Alimentación (Ministry of Agriculture, Fisheries, and Food).

UNWTO: World Tourism Organization.

DOP: Denominación de Origen Protegida (Protected Denomination of Origin)

OEMV: Observatorio Español del Mercado del Vino. (Spanish Observatory of Wine Market)

1. - INTRODUCTION

This Master Thesis has been developed during the final semester of the WINTOUR Master program based on an internship experience at the Consejo Regulador Denominaciones de Origen "Jerez-Xérès-Sherry" and "Manzanilla - Sanlúcar de Barrameda", in Jerez de la Frontera, Spain. Initially, the purpose of this paper was to do field research to analyze and understand in depth the development of wine tourism in areas widely renowned for the production of fortified wines.

This has been carried out by applying the studies and material imported during the program. Unfortunately, due to the major health crisis caused by COVID-19 and the country facing almost since the start of my practice, it has been necessary to turn the methodology and subject of study into a more theoretical project.

1.1- DESCRIPTION OF THE DEPARTMENT: Communication & Promotion

The promotion of the products involved is certainly one of the main tasks of the Regulatory Council D.O. Sherry-Jerez-Xérès and the destination of an important part of its operating budget. For this, in addition to the resources of its regular budget, the Regulatory Council has extraordinary allowances specifically dedicated to generic promotion activities including a budget destined for different areas.

On the one hand, the Institutional Promotion of the Regulatory Council includes sponsorship activities, publications, participation in trade fairs and exhibitions, or other means of diffusion. A mention should be made of the activities included in the "Training Classroom" project presenting courses, tastings, and seminars given by the staff of the Regulatory Council or by trainers authorized by the institution itself. Online activities also play an important role within the Institutional promotion, carried out on the official website of the Regulatory Council. The activity on this platform is encouraged by the information generated not only by the Council but also by the entire sector, making available a specific section for both professionals and the public audience.

In any case, the generic campaign of the Regulatory Council has been designed to the promotion, education, and image actions, complementing the individual promotional actions of the companies. In mature markets, the objective is to help project an attractive image of the product, younger and modern, but avoiding negative responses from current consumers. In new markets, however, generic actions are

characterized by being more formative, focused onto possible prescribers, and generating awareness of the product.

In all cases, the standard communication of the Sherry Council emphasizes the use of the product, highlighting its consumption and the pairing possibilities to denote its connection and possibilities with gastronomy. A good example of this is the prestigious *COPA JEREZ*, the world's largest international Sherry Wine event consisting of a food and wine pairing competition and a thematic conference that spotlights the latest novelties and research about Sherry. Diversity is undoubtedly one of the features of these wines, so the generic communication always aims to project their variety. Moreover, whenever possible, the communication actions of the Regulatory Council try to accommodate the brands present in each market and the key players of their marketing, such as trade professionals, winemakers, etc. (Consejo Regulador, n.d.)

Among the different projects and elements carried out to increase the international promotion, it is worth mentioning the International Sherry Week, a global event originated to bring together thousands of Sherry wine lovers around the world through identical media and messages online. Lately, this successful campaign reached over 5,700 events worldwide, with a total participation of more than 200,000 people who attended digitally all kinds of events: tastings, paired menus, competitions, etc. In short: a global celebration of Sherry. The purpose of the International Sherry Week campaign is to promote the Wines of the DO de Jerez throughout the world. Only in Spain more than 1100 tastings, pairings, and tastings were carried out, which brings into light the versatility and strong personality of these unique wines in the world, recognized with the DOP Quality Seal (Consejo Regulador, 2020).

In 2020 this event, the world's largest celebration of the Wines of the DO de Jerez, has been awarded at the Drinks International Awards 2020, in the category of Best Digital Campaign and Social Networks. This is the second time that this global event, organized by the Jerez Wine Regulatory Council, has received this award from this prestigious British publication, after obtaining it in 2015. The Wine Marketing Awards recognize those marketing campaigns that manage to have a greater impact on the dissemination and promotion of wines, and their importance in increasing brand recognition. In the case of the Best Digital Campaign, it represents recognition for those works concentrating their actions on digital platforms and successfully applying a viral campaign; this allows the audience to interact and share content on social networks which increases to the traffic brand website (Consejo Regulador, 2020).

1.2- BASES FOR MASTER THESIS PROPOSAL

This study has the aim to analyze the wine tourism concept in the surroundings of the Sherry Wine Route and also to understand which have been the fundamental factors to achieve national and international accomplishment in wine tourism regardless of the declining consumption trend of the type of wine produced.

Similarly, it will be valued the possible opportunities that the wine tourism sector can be offered as a tool to gain consumers and increase the market and therefore contribute to the improvement of the local economy

First, it has been necessary to define the framework subject to this study. From a methodological perspective, this article is framed in ordered to comprehend, the geographical aspect involved in the tourist aspects of the region of Jerez de la Frontera and the wine sector as an expanding element within the tourism sector.

Secondly, we will examine the importance and potential of wine tourism at present at a national and then regional level to understand the current trends in and potential future needs. The use of secondary information sources has been fundamental to carry out this project to understand the current importance of the tourism sector within the wine business and the possibilities of exercise in favor of increased marketing and consumption.

For the development of this thesis, a qualitative approach and analysis were done, based on different original materials collected. The data used in this document came mainly from the database that the Consejo Regulador publishes annually as well as some information provided by the City Council researches and analysis, besides the work done by the author of the thesis with online material from National institutions.

The present work is structured as follows: In the first chapter, the concept of Wine Route and the entity that articulates them are deployed by analyzing the data that provides us with an X-ray of the sector and its figures.

Furthermore, this work aims to narrow the wine tourism in the geographical framework of the research, focusing on the description and research of the cultural, climatological, and heritage particularities which integrate the Denomination of Origin D.O. Jerez-Xérès-Sherry. The state of wine tourism in the region has also been outlined to understand the benefits and/or challenges presented by each of them. It analyses the nature of this wine area its historical route and the communication strategy attached to wine tourism.

Another objective aims to settle and analyze the different strategies and factors that the main actors of the framework, both public and private individual or collectively have carried out in recent years and have placed the Sherry Wine Route at the forefront at the national level.

The methodology used in the work combines the use of primary sources: statistical data and reports that collect relevant information around wine tourism, such as reports of the Spanish Association of Wine Cities (ACEVIN), and the Regulatory Council of Jerez mainly, as well as secondary reports that include reading articles, books and studies, focused on the subjects of this work.

2. METHODOLOGY

2.1 Theoretical framework

The definition and conceptualization of the term wine tourism are not uniform, as it can be analyzed from different perspectives, such as marketing or travel motivation. Getz and Brown (2006), describe wine tourism as a set that encompasses at the same time consumer behavior, the strategy for developing the geographical area and the wine trade, and an opportunity to promote the wineries to sell their products directly to consumers.

In this sense, Mitchell and Hall (2006), identify seven different fields in the study of wine tourism: the tourist product itself and its development, regional development based on wine tourism, the size of the wineries that are the subject of the visit, the segmentation of the wine tourism, the behavior of the tourist, the analysis of the experience of the visitor and a final field of risk research, for visitors, related to health quality controls.

In Europe, wine tourism has developed mainly from tourist routes, characterized by both natural and attractions created (cellars, wine museums, etc.). Bruwer (2003) defined a route as a mixture of cultural, environmental, and social aspects. According to this author, a wine route is characterized by the mixture of natural, cultural, and social agents, as well as winery activities, local gastronomy, wine-world observation activities (such as museums), and purchase of local artisanal and differentiated products.

Wine tourism is acting as a conglomerate of the different tourist resources of the wine regions for the creation of an attractive product for tourists and visitors. And wine tourism is, today, a consolidated reality in many of the major wine-producing countries that are equally leaders in tourism, so this sector appears as a complement to mountain and city coasts providing an opportunity to deal with the seasonality. The growing interest in this modality of tourism has been growing since the beginning of the XXI century, with a remarkable rise in the visits to the wineries and wines museums, a fact that has affected the creation of infrastructures and facilities to satisfy the need of the visitors. In this context, the management of the resulting economic structure becomes essential to articulate the productive framework and create synergies among the establishments to consolidate the activity and improve the local economy in this context where the wine routes are marked (Márquez Domínguez, 2018).

In most Mediterranean areas, there is a wide tradition in terms of appellations of origin and geographical indications, establishing a direct relationship between the quality of food and the territorial origin. Among them, wine routes are featured as routes that emphasize natural, cultural, environmental values and becoming means for the promotion of wine territories and their productions and turning them into a tourist offer (Sigala, *et al*, 2019).

An oenological tourist route can be described as the sum of the efforts of many public and private companies so it is crucial to establish a series of associations between the different stake companies responsible for providing the corresponding services, because in the tourist activity the traveler (consumer) only buys a product (satisfy a need through a trip), while this unique product is sold by several bidders (e.g. hotelier, restaurateur, and winemaker) (Lopez-Guzmán and Millán, 2008).

In the Spanish tourism scene, gastronomic tourism is one of the emerging products that is developing the most in recent years; it has obtained the support of public entities such as the General Secretariat of Tourism in the framework "Quality of tourist products", favoring the development of the Wine Routes of Spain. (Fernandez Alonso, *et al*. 2017).

The project of Routes of the Wine in Spain was intended to integrate the resources and the tourist services of a wine region, to build a product from the quality and identity of the destination, optimizing the joint commercialization, the level of satisfaction of the demand, and the integrated socio-economic development of the territory. Supported by the Ministry of Culture, Fisheries, and Food as well as the Ministry of Industry, Trade and Tourism, and ACEVIN, the wine route is defined as the integration under the same thematic concept of the resources and tourist services of the existing and potential interest of a wine region, raised from the authenticity and directional education to build a product from its own identity and facilitate the joint marketing of the whole area and to ensure the level of satisfaction of the demand comprehensive social-economic development of them (EOI,2012).

2.2 Wine routes of SPAIN

The origin of oenological tourist routes in Spain is very uncertain, as wine has always been a key element in the culture of the Iberian Peninsula (López-Guzmán, Sánchez, 2008). The first routes consisted of simple maps indicating the place where the wineries were physically located. Already in the seventies of the last century, in La Rioja was beginning to design tourist routes with a certain development, which followed, with greater or lesser success, other Spanish wine regions. However, it was the creation in 1994 of the Spanish Association of Wine Cities (ACEVIN) that allowed establishing the methodological bases and training necessary for the wine routes to gradually become a reality (López-Guzmán & Sánchez, 2018).

A *Ruta del Vino de España* is one that periodically accredits compliance with the quality and product criteria that ACEVIN and TURESPAÑA set out in the Spanish Wine Routes Tourist Product Manual. This scheme has allowed the boost of wine tourism in Spain, making it one of the most unique and attractive tourist proposals, as well as an important engine of the economy and sustainable development of our towns and cities. Multiple resources of cultural and heritage character, landscapes of vineyards and nature in their purest state, ancestral traditions and customs, events, festivals, culture, gastronomy and wines with Denomination of Origin, cooperate to create a Wine Route specifically designed to prove that its identity is synonymous with quality and excellence (López-Guzmán, *et al.*, 2014).

In May 2020, The Spanish Association of Wine Cities (ACEVIN) made public the most recent Report on the Demand for Wine Tourism, carried out through the Tourist Observatory of the Wine Routes of Spain, as previously mentioned. The results of the new report, the data of which refer to 2019, are quite alike to those found by the previous studies, although there are some changes and differences as detailed below (ACEVIN, 2020): The average spending on the destination has stabilized after several years experiencing a major ascent. The average amount is €160.21 per day, about the same as last year (€161.88), and also indicates that almost all the related items have experienced a slight increase, especially those relating to catering (€41.81 per day) and accommodation (€36.16 per day). The expenditure is still higher than that of the foreign general tourist (€146 per day, according to the latest report of the INE-EGATUR) and that of the national (€47.70 per day, according to FAMILITUR data¹).

¹ <https://www.ine.es/daco/daco42/egatur/egatur0819.pdf>

Once again, the report shows that, in most cases, wine tourists travel as a couple (44%) and group friends (29%). Family travel continues to increase slightly, which shows the growing importance of this type of tourism as a family holiday alternative. Families traveling with children represent 12.6% whereas those without are nearly half this percentage (6.2%). The percentage of people traveling alone has also grown, now rising to 4.3% (ACEVIN, 2020).

Visitors to the Wine Routes of Spain travel in ever smaller groups (6.2 persons), and for transportation choice, the vast majority commonly chose to use the car, either own or rented (85.5%) which reveals once again the autonomous and personal nature of the wine tourism trips. The length of stay at the destination also seems to remain steadied now with an average stay of 2.40 days, a slight decrease from the previous year (2.43 days). This minor fall features the need to continue the promotion and the creation of new proposals that encourage the visitors to extend the stay. As for the expenditure, it was concluded that the average total expense of the wine tour was 384.51 per day, slightly lower than the previous year (€393.38). When it comes to accommodation, rural accommodation seems to have been fueled with an upturn over the last years, standing out as the preferred option for wine tourists (23%), followed by the traditional first ranked category: four-star hotels (18%) (ACEVIN, 2020).

Visits to wineries lead again the ranking of activities (1.93 wineries per day) being the most popular activity for the visitors (84.4%). Visits to villages came in second place as an activity that has experienced a significant rise, peaking up to 63.5%, which is twice as much as the last two years (2017 was 31.7%). The following activities by the participants are those including gastronomy or wine tastings. The difference in travelers staying overnight at the destination (60.48%) and those who leave on the day (39.52%) remains quite stable, although it points out that overnight stay is increasing all over the country. This year, the study analyzed at length the behavior of visitors who do not stay overnight to find mechanisms that can stimulate this upward trend. The majority of visitors go to the Wine Routes of Spain were driven by the interest in discovering a specific wine destination (40%) or it becomes a part of their leisure or holiday trips (36.3%). Other aspects that motivate the trip are the local gastronomy (5.7%), the culture of the wine territories (5.3%), and nature (3.3%) (ACEVIN, 2020).

When it comes to destination preferences, normally is based on the recommendations of friends and family (40.6%), the interest that wines from an area (24.8%) and the attraction generated from the website, social networks (21.8%) or the Internet in general (19.9%). Another aspect positively valued is that there are more and more visitors who claim to have visited another Wine Route of Spain before and who decide to repeat the experience. To be precise, 58.3% of respondents say they have visited another route earlier which means an increase of 2% towards the previous period. 99.4% of respondents would recommend the Wine Route visited (ACEVIN, 2020).

When it comes to socio-demographic profile, there is a minor predominance of women over men (52.3% versus 47.7%), although wine tourism, in general, is a gender-balanced product. As for the age, the majority (27.8%) is aged between 36 and 45 years old. The age range from 46 to 55 is the next most represented in the wine tourist data (26.4%), but the new report highlights that the youngest audience (18 to 25 years old) has experienced a growth of more than 2%, currently accounting for 9.3% of the total visitors. This fact may be related to how the trip is organized with 50.9% of the reservations online. In conclusion, the level of satisfaction of visitors to the routes shows positive results achieving 8.56 points out of 10, a substantial improvement from previous years (ACEVIN, 2020).

In all of Spain's Wine Routes, an average of 25.3% of international visitors is received compared to 74.7% of national visitors. There is therefore still an important margin of growth in the international market. The growth of wine tourism has been continued during all the months of the year, except for the month of March. The increase in wine tourists received during the months of April and May is especially remarkable, although the month with the highest influx is still October, followed by August and September. Nationally: 77% of wine routes have seen an increase in the number of visitors received compared to 2018. The economic impact of wine tourism on Spain's Wine Routes during 2019 could be estimated at around €256.7 million representing a growth of about 6% (ACEVIN, 2020)

2.3. Wine and Brandy Route of the Marco de Jerez

The Wine and Brandy routes of the Marco de Jerez was certified as an official wine route in 2007 which reflects the quality required to the affiliated establishments to get this recognition and with the main goal of promoting, through the different public administrations and with the support of the private initiative, a project that serves to enhance the socio-economic development of tourism in the area. The initiative was originated with the creation of a varied tourist product focused on the world of wine, the signalization of the route, the structure of different itineraries, the creation of an integrated information system, and the conservation of the wine heritage of the geographical area. The Wine and Brandy Routes of the Marco de Jerez involve the nine municipalities included in the Marco de Jerez region: Chiclana, Chipiona, El Puerto de Santa María, Jerez, Puerto Real, Rota, Sanlúcar de Barrameda, Lebrija and Trebujena, which offer a tremendous variety of landscapes and wine tourism resources to provide the visitors with remarkable experiences (Ruta del Vino y del Brandy de Jerez, n.d.)

The region in which the wines are produced under the Jerez-Xérès-Sherry, Manzanilla-Sanlúcar de Barrameda and Vinagre de Jerez (Sherry Vinegar) Designations of Origin and the Brandy de Jerez Specific Designation, known as "Marco del Jerez", is located in the extreme south-west of Andalusia with more than 7000 hectares of vineyard that with 3000 years of wine-making tradition, during which it developed its special production methods (*Figure 1*).

Jerez has a long and international recognition thanks to the two main styles of wines: Fino and Manzanilla, regarded as outstanding examples of universal enology. Its privileged climate particularly favors the growth of three grape varieties: Palomino, from which the dry wines are obtained, and Pedro Ximénez and Moscatel that provide its sweet wine. A remarkable range of wine types is obtained from these white grapes with their characteristic color palate. Such diversity is the result of the type of aging applied to the wine: biological aging under a velum formed by *flor* (yeasts), or oxidative aging. Also, the Sherries are aged using a unique method: the solera system. This dynamic aging and blending system allows an exceptionally long aging period, giving them great subtlety (Consejo Regulador, n.d.)

One of the greatest qualities of Marco de Jerez wines is their potent versatility, from the palest to the darkest, from the driest to the sweetest, opening the consumption possibilities that there is a different sherry for every time of day, every meal and every taste, colors, aromas, and flavors in between Amontillado, Oloroso, Medium, Pale...



Figure 1: Map of the Sherry region

2.3.1- Resources

The Sherry and Jerez Brandy Route of the Marco de Jerez forms an attractive and differentiated tourist offer in a territory with unique climatic conditions, which makes it possible to enjoy throughout the year outdoor activities and the privileges of the countryside and the coast with extensive beaches of sand.

Home to some of the largest wineries in Europe – locally known as "Cathedrals of Wine" due to their size and architectural features. The architecture of the well-known cathedral wineries is a key factor for the winemaking process of this kind of wine and the structure of the cellar plays a key role in the process of aging due to its height as it determines how much air can be stored, essential for wine aging. Another major aspect of this type of winery is the windows, located at high altitude and covered with esparto mats, which prevents sunlight from penetrating the chamber but favoring indoor ventilation. The town accounts for several artisanal wineries in the historical parts of it,

offers a tour of vineyards and tastings in which it is also possible to enjoy the rich gastronomy, among other possibilities. It is a region that offers both typical and innovative signature cuisine and where the wines and brandies bring a distinguished and special touch. Visitors can enjoy a glass of sherry on a sunny terrace and experience a unique atmosphere and unforgettable experiences (Ruta del vino y Brandy de Jerez, 2017).

These wine tourism experiences that visitors can find include a varied range of possibilities and sensations directly connected to the culture and tradition of Andalusia and this part of Spain. For centuries, the horses have been, along with wine and flamenco, one of the most representative and emblematic elements of Jerez, reaching its peak in the fifteenth century, when the monks of La Cartuja culminated a long process of equine selection, giving rise to the famous Carthusian horses. Nowadays, regular equestrian shows such as those offered by the Royal Andalusian School of Equestrian Art and the Yeguada de la Cartuja (Cartuja stud) and the celebration of the International Horse Fair and other equestrian manifestations during the Harvest Festivals, allow the public to enjoy the beauty of this noble animal and the involvement of wine in many of the events held in the city (Turismo Jerez, n.d.)

Even though it is remarkably difficult to make out where this art form was born, Jerez has regularly been considered as the birthplace of Flamenco, as it is one of the locations where the earliest references about Flamenco were dated. Beyond art form, Flamenco is here perceived as a way of life, an expression of roots and culture. The city gives off Flamenco in an atmosphere that permeates the streets and can be experienced in every corner of the city (Vinoble, 2018).

And if there is a local shelter to those representations and its connection with the wine, we cannot go on without mentioning the “tabancos”. This is not a random bar or classic tavern, but an old and typical local establishment where you can drink the Sherry as it was done centuries ago and that still nowadays secrets itself in the hidden lanes of the old town. The word “tabanco” is rarely known out of Jerez, if not out of Spain. The terms may have arisen between the XVII and XVIII centuries, as a blend of the words *estanco* (a government-licensed tobacconist’s, where, anciently, also other products such as stamps or wine) and the word *tabaco* (tobacco). Originally, most tabancos were getting their wines from partner cellars, sometimes working as the home bar for winery workers. Others, instead, would deal with maturation for the wines themselves, and so, working the also as an *almacenista*, another classic figure of the Sherry culture (Ricoy, 2020).

According to the Regulations, an *almacenista* is a firm registered as an Ageing and Storing Winery with the Consejo Regulador; a winery that keeps inventories of wine undergoing the aging process, but whose *sacas* (extractions of wine) are used exclusively for supplementing stocks of aging wines in other wineries and not destined directly for consumption (Consejo Regulador, n.d.)

Nowadays, the *tabancos* are a slightly evolved version of original facilities, and this evolution, although small, has been very meaningful to recuperate these “wine offices” that were on the verge of disappearing. Today, *tabancos* sell sherry in glass, but the practice of serving from the cask is a must. Such is the case that one of the main requirements to open or establish one is to guarantee that 60-70% of the business provides sherry in bulk, stored in the boots, and served in old wooden bars with brings that old touch of the early twentieth century. Equipped with a small kitchen, local dishes are also present to enjoy gastronomy in perfect match with Flamenco live shows for locals and visitors and undoubtedly enjoy the wine (Ricoy, 2020).

It is also worth mentioning, as a main touristic source the creation in 2012 of 'Tabancora', the first “Route of Tabancos” of Jerez gathering several of these local establishments as a new wine tourist proposal. Launched by both public and private entities, the project aims to project that the tourist industry of the city is constant development and therefore promoting new services and resources that destined to connect with the visitor by offering new experiences in the destination, contribute to the tourism growth of Jerez according to the organizers. The route includes an attractive program of cultural activities to boost cultural tourism linked to the general tourism reception. Also, it represents a varied and offers with roots and cultural background which vindicates the identity of the city and reassures its wine backgrounds (Diario de Jerez, 2012).

Sherry is a complex and varied wine, and therefore easily enjoyable with food. It is the perfect accompaniment to a huge number of flavors and recipes. The wide variety existing within the range of Sherry wines makes them an excellent collection to accompany a multitude of recipes and flavors. From the driest to the sweets, the versatility of Sherry wines has enchanted prestigious chefs and gastronomic personalities from all over the world who has undoubtedly become remarkable ambassadors internationally which leads to increased reputation and represents an attractive showcase outside the wine field. One of the most prestigious and acclaimed representatives of this new trend is Josep Roca, sommelier, head waiter and co-owner of the famous restaurant Celler de Can Roca, awarded with three Michelin stars and

twice named the World's Best Restaurant. He is a firm believer in the high potential of sherry wine and states that the culinary arts are today the best way to introduce Sherry Wines to the general public. Sherry wine lovers already know that for any given course of a meal, there is an ideal style of sherry to take the culinary experience to the next level. That seamless perfection between food and Sherry Wines and the spectacular pairings they offer with leading trends in contemporary world cuisine is, without a doubt, the best ways to increase awareness and consumption (Consejo Regulador, 2016).

The strategy of communication of the Sherry Wine Council Jerez is strongly destined to allow awareness and recognition through gastronomy, a practical perspective that unfolds its cultural value and its capacity to beat other wine styles on the matching field. The best example of this is the prestigious COPA JEREZ competition international recognition.

2.3.2- A leader in Spanish wine tourism

Annually, the Spanish Association of Cities of Wine (ACEVIN) releases a report on the Wine Tourism demand, carried out through the Tourist Observatory of the Wine Routes of Spain. This study aims to obtain the most accurate image possible of wine tourism in Spain and analyze its evolution over time. The report sets out aspects related to the motivations for traveling, the organization of it, chosen destinations, background, age and professional and socio-demographic profile of the visitor, level of satisfaction, and other indicators such as spending and the average stay.

The Association of Wine and Brandy Routes of the Sherry region brings together more than 100 partner establishments holding a common purpose to keep improving their activities and also determined to reflect attractiveness and then the importance of Wine and Brandy as cohesive elements of a culture of the Sherry area. Besides, promoting wine tourism is also aiming to boost the economy while preserving and creating awareness of the natural environment. This partnership includes wineries, accommodation, companies, and establishments linked to cultural services, travel agencies, museums, wine shops, restaurants (Ruta del vino y brandy de Jerez, n.d.)

In 2019 the Wine and Jerez Brandy Route of the Marco de Jerez was the most visited route in the country for the fourth consecutive year reaching 568.997 visits, (Figure 2). And it was the route with the highest number of international visitors in the country with 240,871 foreigners (ACEVIN, 2019).

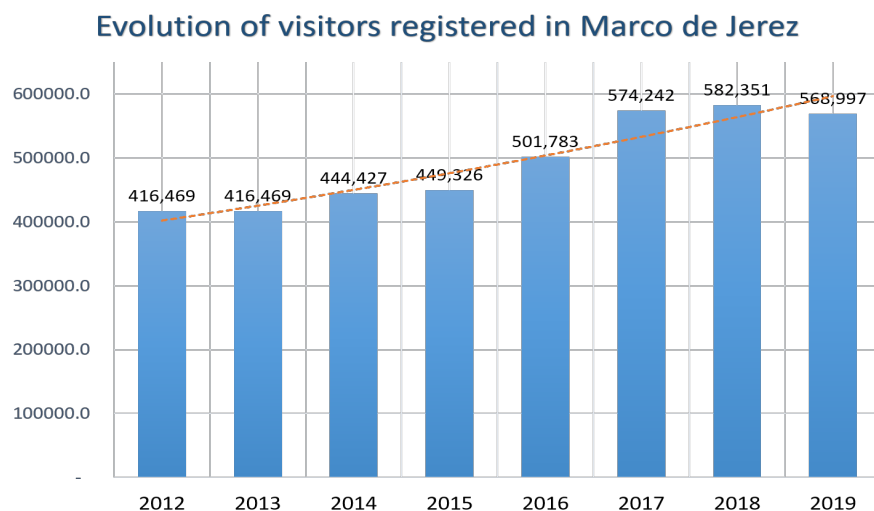


Figure 2: Evolution of visitors of the Wine Route Marco de Jerez. Source: Acevin 2020.

The economic impact of wine tourism on Wine Routes in Spain grew by 20.5 % to exceed €80 million according to the annual report of ACEVIN. Moreover, the number of visitors to the Jerez Wine Route increased in about 10,000 people regarding 2017. September and October were the busiest months for being the period with the largest flood, mostly driven by the harvest and the involving festivals (ACEVIN, 2019).

The Route of the Marco de Jerez accounts for a whole series of gastronomic, cultural, festive, and all kinds of attractions, which allow offering unique and varied experiences allowing the consolidation of a top position as the most visited route in Spain. The other attractions of this are the exceptional gastronomic offer and a variety of plans to enjoy the local nature, such as the Doñana National Park or the Sierra de Cadiz, but also the sun and beach tourism with the sands of the bay of Cadiz. Or in Sanlúcar de Barrameda, which in summer has the great spectacle of horse racing on the beach (Consejo Regulador, n.d.).

2.3.3- Tourist profile

Charters and Ali-Knight (2002), created a classification of the types of wine tourists in a study on tourism management:

- **Wine Lover:** They already have a comprehensive grounding in wine education. They tend to consider themselves more knowledgeable than other segments. Their motivation as wine tourists is also more defined towards the others. They are more likely to want to buy wine, to learn about it, and taste in situ. There is also an extra interest in gastronomy.
- **Wine connoisseur:** They are those who without having a broad education in oenological issues, know the world of wine relatively well; based on university, their main motivation is to implement what they have read in specialized journals or information from external sources.
- **Wine interested:** In this segment are included those who do not have a technical education on oenological subjects, but they are interested in this world; the main motivation of the trip is to know some wineries, although not exclusively but as a complement to other activities.
- **Wine novice:** They are those who for different reasons (such as advertising a route or wanting to try new experiences) approach a winery without having any knowledge in this field; the main motivation of their trip is a completely different one, but they accept, secondary, spend a few hours visiting a winery, where they make purchases intended for private consumption or, in most cases, to give away.

2.4 Sherry Wine Tourist

Thanks to the report that presents graphically the characteristics of the tourist demand, in the Wine Route and Brandy of the Marco de Jerez, we can know information regarding the profile of the traveler visiting the Wine Route and the Brandy of the Marco de Jerez, identifying their habits and preferences based on the information obtained through the Spanish Wine Routes Tourist Observatory through surveys conducted during the period between the second half of 2018 and the first half of 2019 (ACEVIN, 2019). The information discussed is part of the national report but presented individually for this particular Route to provide information regarding the profile of the traveler visiting the Wine and Brandy Route through the identification of behavior and preferences and present the characteristics of the of tourist demand.

Some of the most relevant facts are described as follows and, in some cases, compared to the national figures for its condition of most visited routes in the country. The vast majority of tourists travel with their vehicles (66.8%). Concerning the stay also the highest percentage corresponds to tourists who thus an average of 4 nights of accommodation well exceed the national average located by 2.8%. The preferred accommodation still feels the 4* hotel followed by the tourist apartments that are located at 23.7% (ACEVIN, 2019).

Visits to the wineries lead with 82% of the group of activities with a significant difference from other services and products of the route, reaching an average of 1.65 wineries visited per day. The average expenditure for a person is also slightly higher than the national figures, with €167.61 per person per day with an average of €633.57 per stay, quite above the national media situated in €384.5. These figures can be quite revealing to later analyze the socio-demographic characteristics of the regular visitor.

According to the data² collected by the city council, the main country of origin is Spain, followed by, the United Kingdom, France, and Germany. It must be noted that this data corresponds to general tourists; however, this is in line with the figures of the Route, with Spain as the main place of origin. The main age range is between 26 and 35 which is a younger average audience than the national average, with a majority aged between 36 and 45.

Regarding the motivation, the main reason to visit a winery is to learn about everything related to the world of wine. Also, it is important for the gastronomic specialties of this geographical area accompanied by their corresponding wine.

More than half of travelers choose the destination for leisure (54.4%) and wine tourism comes in second place with just 17.9%. It can be concluded then that, in some way, knowledge of gastronomy and wine is present at the time of the choice of the tourist destination for the majority (ACEVIN, 2019).

And finally, regarding the level of satisfaction, 35.9% of visits are motivated by the recommendation from family or friends. Nearly a third of respondents say they repeat the trip to the Sherry Route (29.45%) and 98.3% recommend visiting the Marco wine route after making an overall assessment of aspects related to the Wine Route that include visits to wineries, gastronomic offer, stay and accommodation, tourist information and value for money, among others. All in all, it results in a high degree of satisfaction for the visit.

² http://siit.turismojerez.com/fileadmin/pdf/SIIT/Barometro_Turistico_Jerez_ano_2019.pdf

2.4.1- Consumer Profile

Knowing the consumer allows choosing the right means for the dissemination of our product and identifying the most effective ways to channel all our marketing strategies. Identifying consumers is crucial for any sector and wine is no exception to understand their behavior in consumption and increase the target audience. Analyzing consumer behavior is part of the marketing process and provides relevant information about the opportunities that can be presented to companies. Marketers who understand consumer behavior have a great competitive advantage in the marketplace (Shiffman & Kanuk, 2010).

Addressing the question of who consumes sherry wine today and what is the profile of the millions of liters that the wineries of the denomination put on the market annually led to a simplified definition implying that the current sherry wine consumers could be classified into three fundamental categories (Domecq, 2015):

- **Traditional:** Regular consumers of sherry in classic markets. In Spain, we find that men represent the largest number, consumers of Fino or Manzanilla; by contrast in the United Kingdom, the Netherlands, etc. In this case, it is the women who lead consumption choosing mostly cream or medium. The average consumer is over 55 years, brand lover with a concept of sherry other than wine as they drink it either as an aperitif or between meals.
- **Occasional:** Very sporadic consumers of any age and gender, who drink sherry on unintended occasions (fairs, celebrations, cocktails...). They have neither brand preferences nor knowledge on the wine; they can drink any type of sherry, according to local preferences, and do it in any form (as an aperitif, for tapas, etc.).
- **Experts:** Wine-lovers and amateur consumers who incorporate sherry into their range of wines consumed frequently. They drink it like any other wine, preferably with food, in relatively informal environments. Generally, they consume all Sherry styles, from the driest to the sweetest style. This group is represented by both men and women of a younger profile (over thirty years old).

There is no doubt that in the immediate future the level of consumption of more traditional customers will continue to be gradually reduced. It is the law of life: consumers one day stop consuming. That client base of sherry, the most important of all we have today, will continue to decline without remission; and its negative developments are the main culprit for the fall in the sector's global figures.

On the other hand, the occasional consumers, those who 'come across' with the wine of Jerez without going to look for it - in our case at the fair, but it could also be in an Andalusian restaurant in Madrid, in the form of a cocktail in New York or during the bullfighting fairs in a Latin American capital - is also a very important part of our figures. And its evolution will depend on the skill we have in the maintenance or even in the generation of those consumption occasions. Something that is not easy, in the face of the voracious competition of countless other products.

So, the main growth opportunity is in the third consumer group. Those we have called 'experts', and which we could rename as the consumers of sherry wine. They are consumers with certain knowledge, or at least, with curiosity or interest in wine, in their largest notion who want to know what kind of wine is best at all times, in what a drink to drink and what food. That is why it is so important that wineries and sectorial institutions do everything in their influence to bring sherry closer to this niche.

2.4.2- Commercialization

Sherry wines remain immersed in a dynamic of reduction of the total volume marketed, although with notable differences depending on the countries and market segments. Total sales of wines armed by the Denominations of Origin "Jerez-Xérès-Sherry" and "Manzanilla - Sanlúcar de Barrameda" during 2018 (Figure 3), amounted to a total of 30,650,977 liters, a drop of 5.8% from the previous year (Consejo Regulador, 2019)

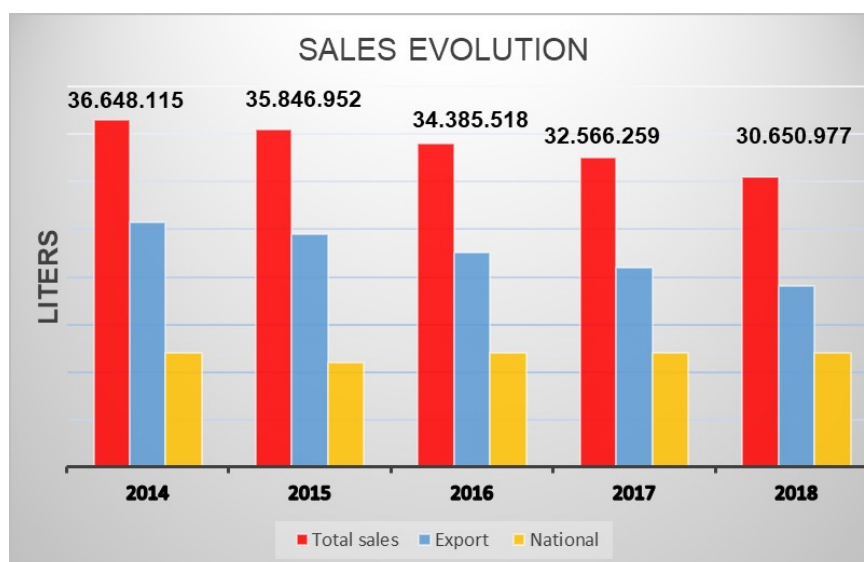


Figure 3. Evolution in total sales of Sherry Wine. Data extracted from the Consejo Regulador Records, 2019.

2.4.3- Sales by type of wine

Fortified dry wines account for 47.2% of total sales of wines included in the denomination, being Manzanilla the best seller with 22.8% of the total, followed by the Fino with 20.8% (Consejo Regulador, 2020). The Amontillado, the Oloroso, and the Palo Cortado account for only 3.6% of the total sales, although it is worth noting a sustained growth in recent years. Fortified liqueur wines also known as blends wines, with varying levels of sweetness, accumulate just under half of the total sales. Finally, natural sweet wines (Moscatel, Pedro Ximénez, and other sweet wines), although they have been maintaining a positive evolution in recent years, only account for 3.7% of total sales of under the denomination (Figure 4).

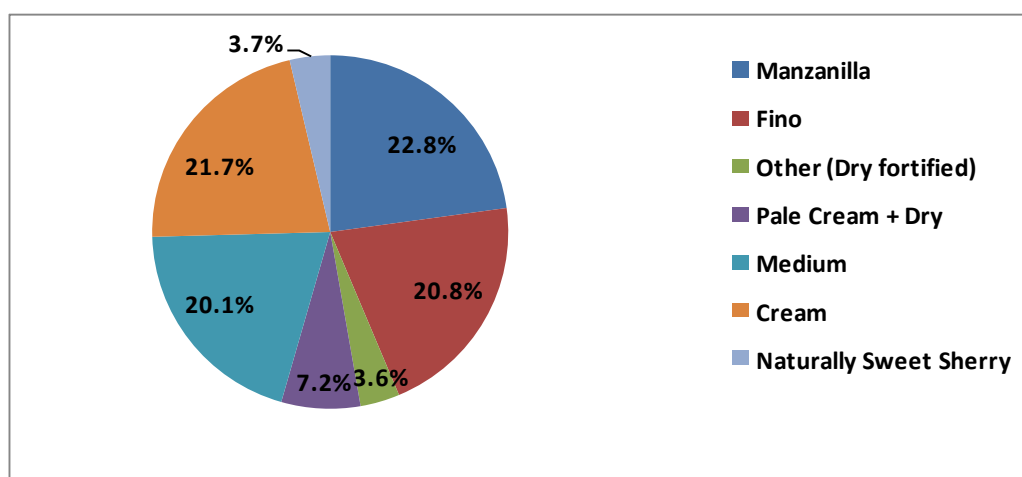


Figure 4. Sales of Sherry by style. Data extracted from the Consejo Regulador 2019 Report

2.4.4- Main markets

The major volume of selling continues to be concentrated in European countries, with almost 94% of total sales and particularly in the four traditional Sherry markets: Spain, the United Kingdom, Netherlands, and Germany. Spain accounts for 38% of sales and maintains the top position since it became in 2014 the largest consumer market for wines included in the appellation and surpassing the United Kingdom, historical top market.

Sales data for the 2019 campaign (Figure 5) shows that the UK represents the first country for international sales with 81,797.83 hectoliters, followed by Holland, where it is worth noting that Sherry wines represent the most commercialized DOP from Spain with a 16.2%. Outside the European Union, other countries worth

mentioning because of the importance of the markets for Sherry wines are the United States, Canada, and Japan, especially in terms of value (Consejo Regulador, 2020).

Special mention must be made to the fact that a large part of exports is dispatched to countries from which they are re-shipped to other markets (such as France); so the data recorded by the Regulatory Council do not always correspond to the final destination where the wines are finally consumed (Memoria Consejo Regulador, 2020).

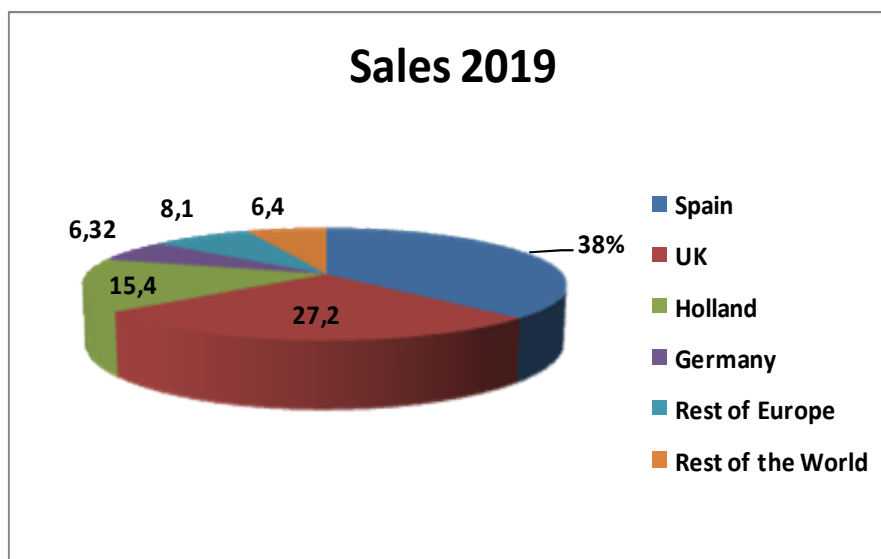


Figure 5. Main markets by country. Data extracted from the Consejo Regulador 2019 report

The latest data published The Ministry of Agriculture, Fisheries, and Food (MAPA³) for the 2017/2018 campaign of the various DOP has been used to analyze the current sales and market evolution. Sherry wines are integrated into the category of liqueur wines along with other DOs of fortified wines listed such as those of the Montilla-Moriles denomination, also in Andalusia, currently on the rise. The figures reflect a manifest decline in both export and domestic sales.

In the total figures of wine sold in Spain according to their typology, liqueur wines are positioned the fourth place behind reds, whites, and rosés, representing only 4.21% of the total. Within its category, Sherry wines are still at the forefront with a remarkable 46.6% (502,969 hl). In 2018 the variation in the total volume commercialized was negative for Sherry wines, with a decrease of 11.25% towards the 2016/17 campaign. For the domestic market, the wines of Montilla-Moriles DOP occupy

³https://www.mapa.gob.es/es/alimentacion/temas/calidad-agroalimentaria/informedops2017-2018modif_tcm30-513739.pdf

the first place within the liqueur wines with 30.7%, followed by the Manzanilla de Sanlúcar and the Sherry wines placed on the fifth position (3.95%). In the area of export, the wines of Jerez continue to be placed in fourth place by a type of wine (4.58%) and leaders with a meaningful difference in the segment of liqueur wines with 81.5% of the total (226,801 hl). It is very curious how Sherry wine maintains its historic leadership in the foreign market while the domestic market share is almost double for Montilla-Moriles at the moment (MAPA, 2019).

3. DISCUSSION

Wine and its context within the Marco de Jerez is one of the oldest heritage of its culture and constitutes a unique element of the landscape, the urban fabric, and of course its culture. As a tertiary activity, wine tourism is an emerging sector, with all the possibilities and potentials that this new tourist typology, but at the same time old economic activity, offers, mainly if we think of the possibility of presenting a solid brand in the wine markets "Jerez", which enjoys great prestige both within the sector and outside it, thanks to its reputation worldwide fame.

El Marco de Jerez and its characteristic wineries are a tourist attraction where several elements that can hardly be found in other cities are combined. Currently, both the political authorities responsible for the tourism sector and the entrepreneurs, are trying to frame this new product in the Wine Route, or what is the same, in a generic offer around wine, where the customer enjoys and knows the culture of wine. This gastronomic offer is based on a series of complementary products where the tourist occupies his leisure time in activities related to wine culture. Therefore, we are speaking about a global conception of the enjoyment of free time related to the world of wine (López, 2010).

Another relevant fact to understand the dominance of the Route of the Sherry area is the tourist attractiveness of the region and geographical surroundings in which it is located, combining, sea, mountain, and several resources including a wide offer for visitors throughout the year. A recent study ⁴showed that Andalusia is the Spanish's favorite region for travel and gastronomic getaways, with 18.6% of the surveyed

⁴DINAMIZA ASESORES - GONZALEZ BYASS. (2017). II Estudio de la Demanda de Turismo Gastronómico en España. Recuperado de <http://dinamizaasesores.es/www/wp-content/uploads/2017/12/Informe-completo-II-Estudio-de-la-demanda-de-turismo-gastron%C3%B3mico-en-Espa%C3%B1a.pdf>

responses. This data was reported by the II study of the demand for gastronomic tourism in Spain carried out by a consulting company in collaboration with one of the most active wineries in wine tourism both in Spain and internationally. Besides, the province of Cadiz is esteemed as a great reference to Andalusian gastronomy, honored homeland to one of the Spanish wines with greater international recognition such as Sherry is. It also has one of the richest and most varied cuisines in terms of ingredients and elaborations process mainly due to its geographical location between the sea and the mountains.

The 1st UNWTO Global Conference on Wine Tourism held Georgia in 2016 already pointed out the relevant role that the wine routes to play when creating a brand, direct ambassadors, and understanding multiple economic, cultural, and historical values. The international organization claims that wine and its winemaking is an integral part of our history as a country and an identity that we must exploit as a national brand image to reach a greater audience inside and outside our borders

We are witnessing times in which freshness, innovation, and going back to the past in the vineyard is on demand. It is a reaction that over time can reach the tastes and preferences of new generations of buyers looking for wines/products with sense and sensitivity. The big problem and at the same time attribute of Sherry wine is its high degree of quality and diversity, that relegates them directly to the hall of highly rated wines, but low in consumption.

For all this, visibility must be given to all those small winemakers that believe in the rebirth of Jerez, with large local and foreign wines that break the standards of origin or elaboration allowed with transgression. Sanlúcar de Barrameda represents an alternative to the noble Jerez and a new way to bypass the rules created by some producers, distributors, and patrons of wines with great potential. Some winemakers and wineries have many things in common that make them drivers of new styles of wines. Thanks to these winemakers the ancestral methods return, are renewed, and adapted to the new times with good practice and outstanding results.

3.1- Reinvention of Tradition

Even the classic and oldest wineries are poured into century-old soleras resulting from six generations in a few bottles. Some others bring up collections of vintages that research new methods of fortification in a single barrel (Single Cask), from its first fine vintages or to explore new fields in oxidative aging at more than 15

degrees like Williams & Humbert is doing.⁵ It is the return to almost forgotten traditions: wines from a single estate, unfortified wines reaching the alcoholic strength with purely sun-dried grapes, or without aging with *flor*. In short, a return to the past to modernize a style of wine marked by history with difficulties going forward. The Consejo Regulador is preparing regulatory changes to welcome this novelty and face the upcoming trends with possibilities that can apply to both the winemaking process and wine tourism opportunities (Corsín, 2017).

3.2- Using Unknown Local Varieties

It is the new paradigm in almost all the new trends: recover forgotten grapes such as the Uva Rey (also known as Chelva) or the Perruna grape. Still wines are also being successfully produced under protected geographical indication (IGP): Vinos de la Tierra de Cadiz. Such is the case of the local Tintilla de Rota, or even foreign varieties with elegant styles such as the Petit Verdot, with more and more followers in the area. This factor represents an added value for the gastronomic and wine tourism offer that expands the 'possibilities reach more public and different types of wine taste (Corsín, 2017).

3.3- The *Terroir* on the Spotlight

Although speaking of Uniqueness in a reputed wine area, trying to make Sherry wines with grapes of quality and reflect a particular estate flavor of different *albariza* soil is an achievement in the Marco de Jerez. For a long time, factors such as the care in the production of the base wine before the long processes of *criaderas* and *soleras* remained in second place. Today growing healthy grapes that express the place becomes more and more important. However, this movement extends beyond production. In line with this, the Wine and Brandy Route of the Marco de Jerez is developing a new project⁶ named "Pagos del Sherry", as a tourist proposal that aims to highlight the entire wine and rural environment that comprises the Sherry area, including the wine tourism offer of the vineyard houses and all the natural, cultural, historical, gastronomic and landscape elements and resources that treasure the

⁵<http://sherryvintages.com/el-sistema-de-anadas/>

⁶ <https://dinamizaasesores.es/enoturismo/los-pagos-del-sherry-una-apuesta-enoturistica-centrada-en-los-vinedos-del-marco-de-jerez/>

territory. All this aims to create a unique, authentic, and genuine product according to the historical and cultural reality of the Sherry terroir (Dinamiza Asesores, 2019).

Over the last years, the wineries of Marco de Jerez have succeeded when opening their doors to tourism and creating unique activities capable of satisfying an eager demand for emotions and sensations. But both the vineyard and the rural areas surrounding the municipalities of the framework were relegated in this regard. With this project, the Wine Route and the Brandy of the Marco de Jerez seek to revalue this rural and natural territory, generating new economic and employment alternatives that contribute to the sustainability of these spaces, territorial balance, and income generation in companies and establishments operating in the area. In brief, it is a sustainable leisure proposal to value the environment of vineyards in all its aspects diversifying the current wine tourism activity of the Marco de Jerez (Dinamiza Asesores, 2019).

3.4. Facing COVID – 19

After several years experiencing significant growth of wine tourism in Spain- and especially in the Sherry region- as mentioned previously in this work, the sector has suffered a strong blow with the economic and social crisis motivated by the Covid-19 pandemic. For this reason, companies linked to wine tourism such as wineries, restaurants, shops, etc. have been paralyzed for a few months in an exceptional situation with a real impact only to have a reflection a posteriori. That is why companies and managers of the Wine Routes found the need to adapt rapidly to the new situation and take appropriate measures. Since the beginning of the alarm state in Spain and the consequent confinement of the population, ACEVIN and Rutas del Vino de España have worked with entities, institutions to prevent as much as possible the impacts generated by the delicate situation that the sector is going through right now. For this purpose, this ACEVIN presented recently the "Guide to Reactivate Post-COVID Wine Tourism", a manual that integrates a series of guidelines and recommendations to reactivate wine tourism and facilitate the reopening of establishments, as an extra tool to the recommendations and protocols defined by the Government and Health authorities, to reactivate tourist services and reopen their doors to the public with all the health guarantees (ACEVIN, 2020).

On the other hand, and following a communication strategy of proximity with companies and the general public in this situation of confinement, Rutas del Vino de España organized a program of sessions through the Instagram profile intending to connect with their audience and showcasing the attractions of wine tourism: wines, landscapes, wineries, towns, peoples, heritage, history, nature... In this way, travelers and wine lovers will be able to escape symbolically from their homes and make a short trip to the Wine Routes of Spain (ACEVIN, 2020).

Likewise, the Regulatory Council of the Marco de Jerez is aiming to emphasize the enormous sacrifice that the current Covid-19 crisis is assuming for the hospitality sector to show its support and raise awareness of the importance that this sector has not only for the economy but also for the local lifestyle. Something that the Regulatory Council has wanted to highlight through different communication actions that give visibility to the admirable work of hoteliers, cooks, sommeliers, waiters and all professionals who are part of a key sector not only for Sherry Wines but for the economy in general says César Saldaña, General Manager of the Regulatory Council. At the same time, the Council aims to reflect this support on the creation and making available for them, resources, and activities to enable them to enlarge their training and acquire new knowledge (Consejo Regulador, 2020).

Among the content offered, there is a wide range with live Master classes performed by Sherry experts, live chats on Instagram, audiovisual productions, such as the Sherry Academy series of training capsules: 8 chapters aimed to know in depth the Sherry enology and many other proposals such as online tastings, interviews, talks, and conferences given by top professionals which can be viewed on the internet. All has been planned to strengthen the great cooperation between the hospitality sector and Sherry Wines and enhance its competitiveness for the near and uncertain future (Consejo Regulador, 2020).

4. - PROPOSAL

4.1 Wine tourism and sales

Wineries are looking to expand the forms of wine distribution as an exhaust valve to reduce domestic consumption. To the considerable increase in export activity, we must add to the increase of direct sales to the consumer in the winery itself, the wine tourism activities, and the incorporation of the Internet as a new sales channel.

The producing sector, the wineries, and the distributor perceive a weight loss of the most traditional channels (which remain very relevant for sale) and an increase in the most modern channels (which are still limited in their expansion). Most believe and recognize that changes are taking place in the consumer, that this is becoming increasingly selective. Therefore, an adaptation to the new consumer is mandatory. The direct sale in the winery is widespread, and so is the link to wine tourism is although with a double position.

For some, it is a positive activity, linked to the image that brings associated benefits, not only to the sale itself but also to the organization of events, reporting outstanding advantages. But other wineries recognize that they do so out of necessity, and it is not a channel that is bet on as they find more disadvantages such as the sales often being more symbolic than relevant. It is also a fact that attractive facilities are required to catch tourist interest if it is intended to promote visits associated with wine tourism, and that will imply in most cases an extra investment.

Yet, wine tourism has now become a general practice in all types of cellars. Most small ones have adopted it as one more form of marketing. Also, there is a direct relationship between the internationalization of the winery and wine tourism with a full range of possibilities to increase its sales. But wine tourism can go further, in other ways like the increase of the wineries dedicated to the activity since many wineries that do not offer any kind of wine tourism although they intend to do it eventually.

4.2- Approaching new generations: consumption and tourism

Wine tourism can be the key for young people to access wine culture in Spain, according to industry experts who ensure that this new consumer time increasingly opts for high value-added, zero-kilometer, and environmentally responsible products.

The wine sector in Spain faces new challenges. The consumption of wine has decayed according to different studies as shown in the report on the wine sector by EAE Business School (2019), which assigns the fall in consumption to demographic issues related to the population aging.

Despite this fall in consumption, expenditure on per capita wine in Spanish households maintains an increasing growth of 1.1% over the past ten years from €20.61 to €22.90. This is because considering that the consumer's age is higher this represents a customer of a higher purchasing level who is looking for higher quality wines. The report presented in 2019 shows a 2% growth in the percentage of young people aged 18 to 25 who participate in wine tourism activities that become 9% of the total, denoting a positive novelty for the sector (EAE Business School, 2019).

According to some surveys, several trends play in favor of the wine sector and its growth in a young market. One of them is the shift towards the consumption of near zero-kilometer products, as well as more bio sustainable practices both in vineyards and in elaboration that leads young people to choose these products. On average young consumers are willing to pay higher prices for water-saving labeled wines. Additionally, wine consumption frequency, label trust, and use, as well as consumers' environmental-friendly attitude, have a positive effect on willingness to pay for these wines. (Pomarici *et al.*, 2014).

Therefore, wine tourism, especially among young people, can act as a decisive weapon for the wine sector to win its race in consumption and also gaining positions in a global tourism market ahead of even stronger Mediterranean competitors. It can reemerge as an activity that captivates travelers due to the peculiar charm of the wine production areas. Among the main motivations that favor its boom is the first-hand knowledge of the most representative wines, the philosophy of the winery, the promotion and collaboration with the development of the town, and the approach to the tourist to enjoying new sensations.

5. - CONCLUSIONS

Wine and gastronomy have been configured in recent years as one of the great motivating elements to visit a certain geographical area. Tourists demand new experiences that allow reinforcing other senses, apart from the visual. Thus, the tourism of wine and also the gastronomic allows reinforcing other types of senses such as taste or smell (López-Guzmán, 2012).

Tourists who come to Spain do so in part because of their gastronomy and the greater knowledge of the different national appellations of origin can lead to improve their internationalization and enhance their distribution. The association of wine with the positive values that it can bring to communities and their appellations of origin such as sustainability, social support or increase in wealth, could help to boost a sector that generated an economic impact of about €81 million on the Spanish economy in 2018, 20% more than the previous year, according to ACEVIN data (2019).

As in many of the most legendary wine areas, the Marco de Jerez is somehow in need to seek new alternatives to incentive the economic and social development of the areas a result in the decline in wine sales and the low productivity generated today by wine farms. And, in this sense, the existence of a tourist route linked to wine has become one of the main tools to achieve this. Continuing to bet on wine tourism is presented as an indispensable tool given the good data it presents, which would provide greater importance to wine tourism proposals oriented to new generations, with alternative options to the classics.

The Wine Route and Brandy of the Marco de Jerez has great possibilities for further development within the nine municipalities for it includes a varied offer related to the wine and complimentary leisure activities, quite suitable for an increase in the wine tourist overnight stays. The combination of existing resources adapted to the demands of new consumer profiles as well as promotion through the international market may be the best scenario for maintaining a favorable position in wine tourism helping to improve consumption numbers at the same time.

It is a reality that some initiatives and projects may represent an important contribution to the leadership status held by this route and oriented to a renewal of its image to reach new generations and consumer profiles. It is a common challenge to be faced by all the areas included in the sherry region, but with enough instruments to re-emerge successfully.

Wine tourism strengthens its position as a particularly interesting holiday option for the national market, contributing to the territorial balance of the country, and complementing other segments such as rural tourism, culture and sun, and beach. This issue is significantly important at a time when the sector is suffering the effects of the expansion of the Covid-19 and a part of its recovery in 2020 may be driven by the domestic market.

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ANNEXES



Annex 1: Acevin Logo



Annex 2: Map of the official Wine routes of Spain



Annex 3: Copa Jerez competition poster



Annex 4: International Sherry Week poster2019