

Exploring marketing strategies in wine tourism: a comparative study of Roussillon and Empordà wine regions

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Abstract

Purpose – This study addresses a gap in the literature by examining the marketing strategies adopted by wineries in the context of wine tourism. This study aims to identify marketing strategic orientations and highlight their significance in the context of wine tourism.

Design/methodology/approach – The research uses a comparative case study approach, focusing on two wine regions, Roussillon (France) and Empordà (Spain). It involves the analysis of 99 active winery websites to identify marketing orientations. Descriptive statistics, cluster analysis and ANOVA tests were used to achieve this.

Findings – The study reveals four distinct wine tourism strategic orientations adopted by wineries in these regions. It emphasizes the importance of external ties, varying levels of competitiveness, website performance and geographical differences as key findings. The results show that wineries with a clear diversification strategy benefit from a higher level of competitiveness.

Originality/value – This research contributes to the academic literature by identifying different marketing strategies within wine tourism, highlighting their importance and providing a comprehensive analysis of key areas, thus adding original insights to the existing body of literature.

Keywords Marketing strategies, Wine tourism, Competitiveness, Clusters, Wine region

Paper type Research paper

Introduction

The wine sector is an important industry for many national economies. Among the top three wine producers in the world by volume, the wine sectors of France and Spain contribute significantly to both the economic and cultural spheres (Ugaglia *et al.*, 2019) of the countries.

Furthermore, according to the International Organization of Wine (Organisation Mondiale de la vigne et du vin [OIV], 2019, 2022), Spain has the largest area of vineyards in the world (13% of the world surface), followed by France in second place (9% of the world



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surface). However, the European wine sector is currently undergoing significant changes that make it more vulnerable and require the implementation of new development strategies. It faces significant international competition from new producers such as Chile, Argentina and New Zealand (Aleixandre *et al.*, 2016; Ugaglia *et al.*, 2019), the European wine sector is dealing with other factors affecting its competitiveness, such as a decline in global wine consumption due to financial constraints on households (lower purchasing power, economic and pandemic crises), production difficulties related to weather variability and the effects of climate change, and the evolution of consumption practices in favor of more responsible products such as organic wines, which results in reduced consumption (Goncalves *et al.*, 2020). Therefore, the wine sector, and wineries in particular must face challenges to remain competitive and rely on various levers to improve the marketing of their wines.

In this context, some wineries have bet on diversification, creating specific tourism products, and taking advantage of local policies to promote wine tourism. In fact, wineries are a kind of special economic agent that frequently adopts a hybrid role, being industry producers and service providers at the same time (Carlsen, 2004), acting frequently as key agents who contribute to regional development in rural areas (Bruwer, 2003; Camprubí and Galí, 2015; Hall, 1998). Hence, attracting visitors represents for most wineries the opportunity to have a wider variety of ways they generate revenues by selling their products directly to the final consumer (Getz and Brown, 2006) and by offering wine tourism experiences expanding their sources of income (Remeňová *et al.*, 2019). Accordingly, and considering that the wine region may influence the decision to engage in strategic alliances for wine tourism development, wineries may develop different business models with varying degrees of emphasis on the development of wine tourism activities.

In view of the above, and according to Scorrano *et al.* (2018), the connection between wine and tourism has gained relevance for the competitive advantage of the region and the products developed by different actors as wineries. In this context, wine and tourism stakeholders need to rethink collaborative promotional strategies and use efficient communication tools to disseminate and promote, not only individual businesses (wineries, hotels, etc.), but also the wine region as a whole (Bhat and Milne, 2008; Ramos *et al.*, 2018). This requires effective online communication such as websites and social networks, to ensure proper dissemination. Thus, it would be interesting to gain a deeper understanding of marketing-related issues, such as the product portfolio and the existence of a collective regional strategy by analyzing the website marketing practices.

The research proposed in this paper is in line with Getz's (2000) assertion that an essential area of research in wine tourism should focus on evaluating the marketing strategies and other factors that influence the success of both wineries and destinations. Therefore, the purpose of this study is to explore the marketing strategies used by wineries by analyzing their websites. More precisely, this paper aims to analyze whether wineries with different characteristics use distinct marketing strategies in terms of diversification toward wine tourism. Also, this paper aims to investigate the extent to which different marketing strategies vary across two wine regions (Roussillon in France and Empordà in Spain).

To achieve these objectives, this study first reviews the literature focusing on wineries' tourism strategic orientation opportunities, both for the wineries themselves and for the destination as a whole, emphasizing the need for wineries, of relying on the Internet and developing digital tools such as a website to deploy their marketing strategies. Second, the methodology is outlined, followed by the presentation of the research findings. The study concludes by addressing conclusions, limitations and future research.

Literature review

Wineries' tourism-oriented strategy

The wine sector is currently undergoing significant changes that require the implementation of new development strategies. In this context, wine tourism, located at the crossroads of cultural tourism and gastronomic tourism (Atout France, 2017), can be an interesting tool for the development of wineries. Wine tourism can be classified as a type of niche tourism (Hall, 1998), which includes various experiences such as visits to vineyards and wineries, wine tasting, wine festivals and wine shows (Hall, 1996). As various authors have argued, the benefits of wine tourism for wineries are twofold: (a) it represents a marketing opportunity to promote the wines of the vineyards, develop brand image and brand equity and build loyalty (Byrd *et al.*, 2016; Getz and Brown, 2006; Marzo-Navarro and Pedraja-Iglesias, 2021); and (b) it represents a financial opportunity to increase direct sales and additional benefits (Alonso and Liu, 2012; Marzo-Navarro and Pedraja-Iglesias, 2021). Wine tourism strategic orientation, therefore, is framed within the context of a diversification strategy, which allows wineries to develop their activity and benefit in the long-term (O'Neill and Palmer, 2004; Rasch and Gretzel, 2008). Diversification, according to Ramanujam and Varadarajan (1989), "is defined as the entry of a firm or business unit into new lines of activity, either through processes of internal business development or acquisition, which entail changes in its administrative structure, systems and other management processes." Thus, a diversification strategy means that firms are simultaneously engaged in different businesses (Pitts and Hopkins, 1982), which requires new skills, new techniques and new facilities (Ansoff, 1957, p. 114) and allows for improved business performance. When a winery incorporates wine tourism into its business model, it is a challenging process (O'Neill and Palmer, 2004) that requires significant learning and organizational changes. However, some wineries show a poor development of wine tourism activities and do not take the strategic marketing opportunity to diversify their activity, despite wine tourism constitutes an important driver of business for wineries (Marzo-Navarro and Pedraja-Iglesias, 2021; Rasch and Gretzel, 2008). In this sense, some authors have pointed out several challenges for the development of wine tourism activities (O'Neill and Palmer, 2004; Wargenau and Che, 2006) and especially for medium and small-sized wineries (Marzo-Navarro and Pedraja-Iglesias, 2021). For instance, wineries, typically agriculture-based enterprises, need to integrate elements of a service-based industry into their operations, to develop the benefits with the wine tourism diversification strategy and ensure a positive experience for visitors (O'Neill and Palmer, 2004). It leads to physical and organizational changes in the structure of the business (Ansoff, 1957). But, as many wineries are medium or small businesses, their limited resources, limited customer base and limited marketing practices may hinder the implementation of a clear diversification strategy that aims to incorporate wine tourism into their product portfolios (Vrontis *et al.*, 2011) and, thus, their business models.

Strategic alliances as a mean to develop wineries' tourism activity

Academic literature has widely recognized that wine tourism is a type of tourism that can promote development in rural areas (Bruwer, 2003; Camprubí and Galí, 2015; Rasch and Gretzel, 2008); and improve destination competitiveness by creating labels and wine routes (Bruwer, 2003; Marco-Lajara *et al.*, 2023). Wine routes refer to designed circuits that outline specific travel itineraries within a particular geographical area, where all the attractions and points of interest for tourists are clearly marked with appropriate signage (Cruz-Ruiz *et al.*, 2020). The design of a route needs to take both its geography and resources into consideration (Camprubí and Galí, 2015); and frequently, both wine and gastronomy appear to be linked (Getz, 2019). In this sense, wine routes are postulated as a collective strategy not

only for vineyards and wineries that are part of the label, but also other businesses in the regional tourism sector (Sigala, 2019; López-Guzmán *et al.*, 2011). Hence, the creation of business partnerships or strategic alliances (Palmer and Bejou, 1995, p. 616) involving tourism and wine stakeholders is attractive for the tourism industry as it allows offering a complex product, answers customer needs and promotes the destination as a whole.

According to Gulati (1998, p. 293), strategic alliances are “voluntary arrangements between firms involving the exchange, sharing, or codevelopment of products, technologies or services. They can occur as a result of a wide range of motives and goals, take on a variety of forms, and occur across vertical and horizontal boundaries.” They help coordination across firms promoting trust, mutual dependence and reciprocity (Rao and Reddy, 1995); enabling organizations, at the same time, to develop a competitive advantage (Kinderis and Jucevičius, 2013). As a part of the regional strategic alliances, wineries are encouraged to develop a range of activities to attract tourism, such as guided tours and tastings. However, there are no specific rules, and each winery has the individual command to make its strategic choices and decide its degree of implication or contribution to the wine tourism development, thus creating its own tourism product. Thus, to market wine tourism, marketing strategic alliances between local wineries (horizontal alliance) and/or between wineries and regional tourism partners (vertical alliance) seems to be essential to develop the strategy (Wang and Fesenmaier, 2007; Wargenau and Che, 2006) and contribute to the success of the wine tourism strategy. In fact, as Rasch and Gretzel (2008, p. 320) explain concerning horizontal alliances, “by working together, wineries can effectively create a wine region that tourists can easily visit.” In fact, through the promotion of a wine route, for example, wineries can establish strategic partnerships, allowing them to join marketing resources (Wargenau and Che, 2006) and be more efficient. In another way, vertical alliances involve links to other tourism agents of the destination, such as the DMO, accommodation companies, restaurants, tourist attractions or other tourism partners that contribute to the success of the wine tourism marketing strategy (Jaffe and Pasternak, 2004; Rasch and Gretzel, 2008; Wargenau and Che, 2006).

Globally, wine tourism literature highlights the importance of marketing strategic alliances (Jaffe and Pasternak, 2004; Rasch and Gretzel, 2008; Wang and Fesenmaier, 2007; Wargenau and Che, 2006) as they allow to pool marketing resources and efforts (Palmer and Bejou, 1995; Reid, 1987) and tackle the various challenges faced by medium- or small-sized businesses, particularly in terms of online communication and promotion.

Wineries' website strategy: a tool to analyze wine tourism strategic orientation

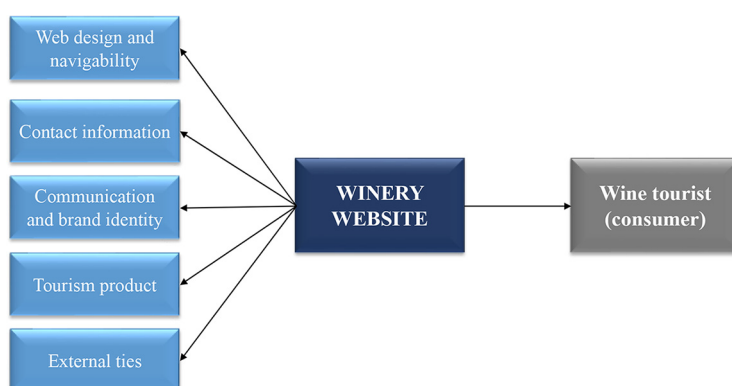
In a context of competition and consumer behavior changes, online marketing strategies are pivotal, and websites are recognized as essential tools for the strategic development of the wine industry (Gurău and Duquesnois, 2011). The academic literature has highlighted the importance of online information in tourist decision-making (Kim *et al.*, 2013; Marzo-Navarra and Pedraja-Iglesias, 2021) as Internet is commonly used among wine tourists (Rasch and Gretzel, 2008) and influences the consumer decision-making process (Getz and Brown, 2006; Zeithaml *et al.*, 2002). In this context, the rise of the Internet and digital tools has become vital for businesses and destinations (Buhalis and Law, 2008; Alebaki *et al.*, 2022).

The wine industry, which has traditionally used on-site marketplaces to sell its products, has found the Internet, and websites in particular, to be a crucial marketing tool for disseminating and promoting its offer (Bruwer, 2003; Doolin *et al.*, 2002; Kielsing *et al.*, 2023; Rasch and Gretzel, 2008), including wine tourism products such as wine tasting and guided tours of wineries and vineyards. For wineries, the Internet is essential to remain competitive and overcome challenges (Begalli *et al.*, 2009; Christie *et al.*, 2003;

Kleindl, 2000; Sparkes and Thomas, 2001) as it is an important source of information to attract consumers. In fact, following the pandemic crisis, the website has become an essential marketing tool to disseminate and promote wine offers and provide information about destinations, helping consumers to prepare their trip and visits in advance (Byrd *et al.*, 2017; Garibaldi, 2022).

To deploy the marketing strategy and achieve better visibility and enhancement of the tourism offers developed by the various stakeholders in the wine and tourism sector, wineries' online marketing practices are an interesting approach to promote wineries in particular, as well as destination as a whole (Alebaki *et al.*, 2022). In wine tourism, wineries not only compete for the sale of wines, but also for attracting visitors to their vineyards, to whom they can offer their products and wine tourism experiences. Therefore, wineries' online marketing strategies (Begalli *et al.*, 2009) are of great importance to impulse online wine purchases and tourist visits to wineries, as "web tools provide the first virtual experience of the destination" (Scorrano *et al.*, 2018, p. 134). So, websites are of great importance because they can influence the competitive capacity of wineries when they use this tool in a more efficient way.

In this context and, as websites can be a source of competitive advantage (Hernández *et al.*, 2009), it is necessary to take into account "the key concepts when designing a commercial website which contribute to a successful e-strategy" (Hernández *et al.*, 2009). Since website conception influences perception (Notta and Vlachvei, 2013) and consumer behavior (Zeithaml *et al.*, 2002), different levels of online marketing practices are developed by wineries beyond websites (Begalli *et al.*, 2009; Chaffey *et al.*, 2000; Ditto and Pille, 1998) (Figure 1). Online marketing practices involve developing key information to communicate, educate, inform, build a brand and promote tourism offers. These practices encompass various objectives such as informing consumers (e.g. contact information) (Taylor *et al.*, 2010); presenting offers related to wines and tourism experiences offered by the winery (e.g. wine tasting, guided tours...) (Notta and Vlachvei, 2013), but also by the DMO (Camprubí and Galí, 2015; Rasch and Gretzel, 2008); developing a corporate identity through branding and storytelling (Rasch and Gretzel, 2008) and fostering interaction with consumers (Berthon *et al.*, 1996).



Sources: Elaborated from Lemoine (2019); Notta and Vlachvei (2013); Rasch and Gretzel (2008) and Taylor *et al.* (2010)

Figure 1. Conceptual framework for wineries websites

In particular, [Taylor et al. \(2010\)](#) state that it is essential to develop websites that include specific features to disseminate stories about wineries and their wines, to make wineries websites more attractive and pleasant. This includes presenting the winery history, profiles of winemakers, specific wine information, wine awards and other relevant information in a way that aligns with brand content. In their analysis, [Rasch and Gretzel \(2008\)](#) analyzed websites regarding general online marketing practices, including winery image, online direct sales and so on. They also evaluated wine tourism marketing, including both wineries and regional promotion. In addition, the quality of a website is not limited to a utilitarian dimension (navigation, quality of information, reliability, security, privacy respect, etc.) but also to a hedonic dimension (aesthetics, fun, etc.), allowing a pleasant online experience ([Lemoine, 2019](#)). In this sense, the website also provides an opportunity to show wine offerings, tourism activities (e.g. wine tasting), contact information and external ties information ([Notta and Vlachvei, 2013](#); [Taylor et al., 2010](#)). These elements are crucial for encouraging online wine purchases and winery and destinations' visits (see [Figure 1](#)).

Hence, the website serves as a platform for evaluating the effectiveness of the implemented marketing strategy, a crucial factor for the winery's overall performance and the success of both the destination and the featured wine tourism product. Consequently, this research aims to determine the extent to which wineries have embraced a diversification strategy in the context of wine tourism.

Methodology

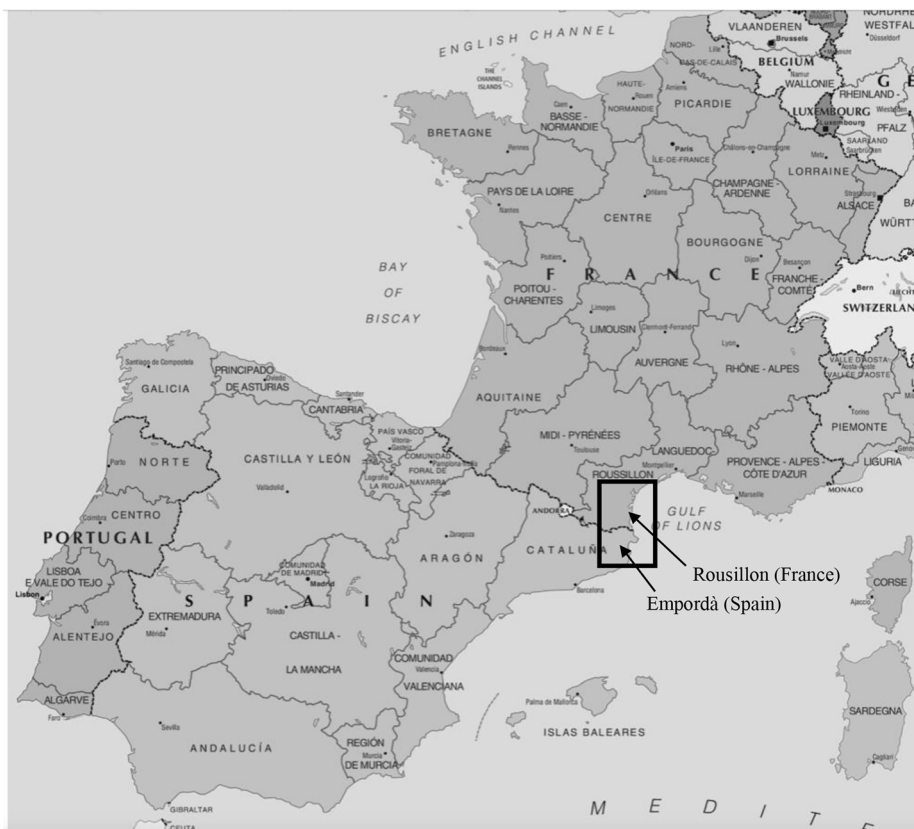
Study sites

This study focuses on the analysis of wineries located in two winery regions ([Figure 2](#)): Roussillon (East of Pyrénées-Orientales, France) and Empordà (North-East of Catalonia, Spain). It is worthy to remark that in both countries, France and Spain, wine tourism is viewed as a strategic tool for promoting both wine and regions while encompassing elements of culture, gastronomy and heritage.

Both selected regions boast labels that attest to the quality and uniqueness of the wines they produce ([Charters et al., 2017](#)). In the case of the AOP (Appellation Origine Protégée) Côtes du Roussillon, this designation was awarded in 1936. Roussillon includes an area of 3,640.00 hectares dedicated to vineyards, with a production rate of 32 liters per hectare, resulting in an annual production of 115,131.00 hectoliters. As for the DO (Denominació d'Origen) Empordà, the label was granted in 1975. Initially known as DO Empordà-Costa Brava, it transitioned to DO Empordà in 2006. Empordà covers nearly 2,000 hectares allocated to vineyards, yielding an annual production of 56,848 hectoliters. Notably, 15% of Empordà's wines are exported to countries such as Germany, Switzerland, the USA, The Netherlands, Norway, the UK, Belgium and Denmark.

Despite the obvious differences between these two territories in terms of the size of vineyards and wine production, the interest in conducting a comparative study is rooted in identifying certain similarities in the development of wine tourism. These territories are located in nearby geographical areas with significant orographic similarities and potential for wine tourism. Therefore, this study provides comprehensive insights into wine tourism and its implications for regional development.

This study comprises wineries affiliated with the "AOC Côtes du Roussillon" label and the "DO Empordà" label that have an active website. Initially, 102 wineries were identified, but 3 cases were excluded due to unavailable websites. The final sample includes 99 wineries, with 55 wineries in the Roussillon region and 44 wineries in the Empordà region.



Source: Adapted from printable-maps.blogspot.com

Figure 2. Study sites location

Data collection

A content analysis of the wineries' websites was carried out to assess their marketing strategy and determine whether a strategy to position them in wine tourism exists. Content analysis is "an observational research method that is used to systematically evaluate the symbolic content of all forms of recorded communications" (Kolbe and Burnett, 1991, p. 243). A total of 36 items were considered for the content analysis, organized into five different thematic areas based on previous literature (Begalli *et al.*, 2009; Camprubí and Galí, 2015; Cerquetti and Romagnoli, 2023; Doolin *et al.*, 2002; Gassiot-Melian and Camprubí, 2021; Luna-Nevezer and Hyman, 2012; Marzo-Navarro and Pedraja-Iglesias, 2021; Morrison *et al.*, 1999; Rasch and Gretzel, 2008). Items were assessed using dichotomous values (yes/no), with "yes" indicating that the item was present and available on the website following previous studies (Camprubí and Galí, 2015; Marzo-Navarro and Pedraja-Iglesias, 2021; Rasch and Gretzel, 2008).

Table 1 provides specific information about the items considered for the analysis. The thematic areas are as follows:

Table 1. Analyzed items

THEMATIC AREAS	ITEMS	Begalli Camprubi and Gali (2009) (2015)	Cerquetti and Romagnoli (2023)	Doolin et al. (2002)	Gassiot-Mellan and Camprubi (2021)	Luna-Nevarez and Hymán (2012)	Marzo-Navarro and Pedraja-Iglesias (2021)	Morrison et al. (1999)	Rasch Gretzel (2008)	Stepchenkova et al. (2010)
Website design and navigability	Intuitive navigation	x						x		x
	Mobile compatibility									x
	Fast load time				x					x
	Responsive design	x								x
	Modern design									x
	Internal search engine	x	x	x		x	x	x		
	Site map	x	x	x	x	x	x	x		
	Languages	x	x	x	x		x	x		
	Initial banner		x							
	Interactive banner (including animated images)						x			
Contact information	Contact details (address, telephone, email, contact form...)	x	x	x	x		x	x		x
	GPS coordinates									
Communication and brand development	Company's history		x	x	x		x	x		x
	Wine information	x	x	x			x		x	
	Newletters/Club		x	x			x		x	
	Awards							x		
	Photos and videos gallery	x	x	x			x	x		
Social networks use	Ethical issues	x								
	Social networks use	x	x			x	x			
	Winery logo		x							
Location map	x				x	x	x		x	

(continued)

Table 1. Continued

THEMATIC AREAS	ITEMS	Begalli <i>et al.</i> (2009)	Camprubi and Galli (2015)	Cerquetti and Romagnoli (2023)	Doolin <i>et al.</i> (2002)	Gassiot-Melian and Camprubi (2021)	Luna-Navarez and Hymman (2012)	Marzo-Navarro and Pedraja-Iglesias (2021)	Morrison <i>et al.</i> (1999)	Rasch Gretzel (2008)	Stepchenkova <i>et al.</i> (2010)
Tourism product	News section (ongoing developments, events, trends, etc.)*							x			
	Tourist information provided				x				x		
	Route membership			x							
	Reference to the wine route	x									
	Wine tourism activities (type of activities, diversity...)	x	x	x		x		x			x
External ties	Diversity of activities										
	Links to accommodation			x				x			x
	Links to restaurants			x				x			x
	Links to tourist attractions			x				x			x
	Link to tourism office			x				x			x
Links to other partners		x	x				x			x	

Note: News section has been considered as an additional variable, to highlight the relevance to generate self-publicity

Source: Own work

- Website design. This category includes elements related to website usability, such as intuitive navigation, mobile compatibility, fast loading time, etc.
- Contact information. This section includes general information to contact the company such as the address, telephone, email address, contact form, among others.
- Communication and brand development. This theme contains specific information on the website that can help to promote the company and its products, such as company history, wine information, news section, awards, photo gallery, etc.
- Wine tourism product. This section includes information on the characteristics of the winery's tourism products and services, its membership in the wine route and its contribution to the promotion of the destination.
- External ties. This section includes links to other tourism operators of the destination, such as the DMO, accommodation providers, restaurants, tourist attractions or other partners.

Content analysis was conducted by three coders: the two authors and an independent coder (Camprubí and Coromina, 2016). Rules, criteria and procedures were established by the authors, and the independent coder was trained accordingly (Kolbe and Burnett, 1991). A pretest of 15 websites was conducted to ensure consistency of the rules and criteria (Holsti, 1968). Each website was analyzed twice to validate the collected information. In case of inconsistencies, the matter was discussed until an agreement was reached (Camprubí and Coromina, 2016). The guidelines provided by Camprubí and Coromina (2016), Kolbe and Burnett (1991) and Holsti (1968) were taken into account to ensure the objectivity, validity and replicability of the results obtained.

Data analysis

Various statistical methods were used to analyze data, using SPSS 21 for iOS. First, to determine the most salient characteristics of analyzed wineries descriptive statistics were conducted. Second, a cluster analysis was used to determine marketing orientation of wineries.

Cluster analysis is a technique used to group data into a smaller number of clusters, with the goal of classifying the data into mutually exclusive groups (Hair *et al.*, 1998; Cea, 2004). Cluster analysis implies making a number of decisions. First, the cluster analysis has been conducted using as classification variables the thematic areas performance indices computed for this purpose, to obtain a quantitative measure of data collected. Indices are the sum of the values of the items in each thematic area, divided by the number of items. Additionally, a competitiveness index was calculated to provide an overall measure of the wineries' competitiveness in the context of wine tourism. By taking the average of the other performance indices, which represents specific aspects of the wineries' websites (website design, contact information, communication and brand development, tourism product and external ties). This index serves as a valuable metric for understanding how wineries fare in the competitive landscape of wine tourism through their wine tourism strategic orientation, providing insights into their relative strengths and areas for potential growth. In this study, a hierarchical method was selected because the number of cases does not exceed 200 (Hair *et al.*, 1998). The Ward method was chosen as the classification algorithm because it minimizes intragroup variance and tends to create clusters with a similar number of objects that are roughly spherical in shape (Jurovski and Reich, 2000; Cea, 2004). A Euclidean distance measure was used because it is appropriate when using the Ward method (Cea, 2004). Also, variables were standardized using the z score to minimize the impact of the Square Euclidean Distance on the resulting clusters (Cea, 2004). The cluster analysis results were analyzed for groupings of two, three, four and five

clusters. Ultimately, the four-cluster grouping solution was found to be the most effective in terms of explained variance and coherence (Hair *et al.*, 1998). Finally, an ANOVA test was conducted to determine if the marketing strategic orientation of wineries is influenced by the region in which they are located.

Results

Websites' descriptive analysis

The results obtained from the descriptive statistics show the strengths and weaknesses of the wineries' marketing strategy. Ideally, all the rated items should be present on winery websites, taking into account the literature review used to define them (Begalli *et al.*, 2009; Camprubí and Galí, 2015; Cerquetti and Romagnoli, 2023; Doolin *et al.*, 2002; Gassiot-Melian and Camprubí, 2021; Luna-Nevarez and Hyman, 2012; Marzo-Navarro and Pedraja-Iglesias, 2021; Morrison *et al.*, 1999; Rasch and Gretzel, 2008).

Based on the data in Table 2, and focusing on "website design and navigability" it appears that most part of the websites have a responsive design (76.8%) and intuitive navigation (74.5%), they are mobile compatible (72.7%), and they have a modern design (70.7%), but a relatively low percentage have a fast loading time (59.6%). In general, there is a small percentage of websites that include an initial static banner (35.40%) presenting information about the winery. However, the number of websites that have an interactive banner with animated pictures is higher (66.40%). This is a positive feature to attract the attention of website users (Luna-Nevarez and Hyman, 2012).

With regard to "contact information," the results show that most of the websites analyzed contain the essential information needed to contact the wineries, such as an e-mail address (91.9%), a telephone number (89.9%) and the address (86.9%). The number of websites that also include a contact form (74.7%) is relatively lower, but it is still generalized. However, relatively few websites include GPS coordinates (23.2%).

Regarding "communication and brand development," the majority of websites include wine information (93.9%), specific information about the company's history (80.8%), as well as the winery's logo (86.9%), and a location map (73.7%). In terms of communication tools integrated in the website, findings reveal that the most part of the wineries add information about their social networks profiles (82.8%), but they do not use the full potential of other types of communication tools. For example, just over half of the websites have a section to present news about their activities or achievements (54.5%), and less than 30% offer the possibility of subscribing to their newsletter. In terms of visual information, galleries are also only present on some websites. To be more specific, 53.5% of the websites include a photo gallery, and nearly 20% include a video gallery. Finally, it is relevant to highlight the fact that only 31.3% of the wineries' websites provide ethical information or considerations. This information could include references to the use of organic production, a sustainable production process or advice on responsible consumption of wine products.

In terms of "tourism products," 75.8% of the wineries offer some kind of enotourism activity, but only half of the wineries offer two or more activities (50.5%). However, there are other aspects of the enotourism product that are less common among the vast majority of the wineries such as specific references to the wine route (37.4%) or a specific mention of their membership of the route (46.5%). Only 20.2% of the wineries provide specific to tourist information on their websites, which is relatively uncommon.

Finally, "external ties" to other tourism businesses and attractions to the destination are relatively uncommon, representing a low level of external integration. Some of the partners that appear as links to their websites are links to accommodation business (11.1%) or

Table 2. Frequencies of thematic areas by items

Items	<i>n</i>	%
<i>Website design and navigability</i>		
Intuitive navigation	74	74.50
Mobile compatibility	72	72.70
Fast load time	59	59.60
Responsive design	76	76.80
Modern design	70	70.70
Initial static banner	35	35.40
Interactive banner (animated pictures)	66	66.40
Search engine	22	22.20
Site map	33	33.30
Languages (variety)	69	69.70
<i>Contact information</i>		
E-mail	91	91.90
Contact form	74	74.70
Address	86	86.90
Telephone	89	89.90
GPS coordinates	23	23.20
<i>Communication and brand development</i>		
Location map	73	73.70
Company's history	80	80.80
Wine information	93	93.90
Newsletters/club	26	26.30
News section	54	54.50
Awards	35	35.40
Photo gallery	53	53.50
Videos gallery	22	22.20
Ethical issues	31	31.30
Social networks use	82	82.80
Winery logo	86	86.90
<i>Tourism product</i>		
Tourist information provided	20	20.20
Route membership	46	46.50
Reference to the wine route	37	37.40
Wine tourism activities	75	75.80
Diversity of activities	50	50.50
<i>External ties</i>		
Links to accommodation	11	11.10
Links to restaurants	10	10.10
Links to tourist attractions	3	3.00
Link to tourism office	2	2.00
Links to other partners	15	15.20

Source: Own work

restaurants (10.1%). Links to tourist attractions (3%) or the tourist office (2%) are very uncommon.

These findings lead to the conclusion that while many winery websites have commendable attributes, particularly in the areas of “website design and navigability,”

“contact information” and “communication and brand development”; there are still some areas for improvement, particularly in the areas of “tourism product” and “the external ties.” Although the vast majority of wineries are making efforts to offer a wine tourism product, it cannot be said that the proposed experiences are consistently integrated into the overall marketing strategy of all wineries in the way that [Pitts and Hopkins \(1982\)](#) conceptualize diversification. Additionally, the limited incorporation of strategic alliances with other businesses and attractions in their websites, suggests a potential missed opportunity for wineries to enhance their visitors’ experience by providing convenient access to complementary services and attractions. In this sense, according to [Gulati \(1998\)](#), strategic alliances must involve the exchange, sharing or codevelopment of products, technologies or services. In other words, it is important to consider that when wine tourists seek information about a destination, they try to compile exhaustively all the information that will be useful in organizing their trip, including information about the region’s wineries, as well as information about the wine itself and the physical characteristics of the region ([Marzo-Navarro and Pedraja-Iglesias, 2021](#)). Findings suggest that this is not achieved in a relevant part of the cases. [Marzo-Navarro and Pedraja-Iglesias \(2021\)](#) also consider aesthetic aspects and seek information on cultural attractions, accommodation and restaurants in the area, as well as many practical details (winery opening hours, activities, etc.); all of which should be readily available on winery websites. Based on suggestions from the academic literature on strategy, the results indicate a need for improvement in this area.

Wineries’ cluster analysis

A cluster analysis was conducted to identify the marketing profiles of the wineries in terms of wine tourism strategic orientation, using the performance indices of the thematic areas as classification variables. [Table 3](#) depicts results of these performance indices, which confirm the trends previously identified in the descriptive analysis for all the thematic areas. In particular, the competitiveness index, which is a composite index as explained in the methodology section, shows a relatively low average level (0.4874). This indicates that wineries have room for improvement to strengthen the digital marketing strategy of the wine tourism sector ([Marzo-Navarro and Pedraja-Iglesias, 2021](#); [Rasch and Gretzel, 2008](#)) and their market position.

Regarding the cluster analysis results ([Table 4](#) and [Figure 3](#)), four cluster groups solution was the most suitable approach in terms of explained variance and coherence ([Hair et al., 1998](#)). The four identified typologies of wineries based on their online marketing strategies are as follows:

Table 3. Wineries’ websites performance indices

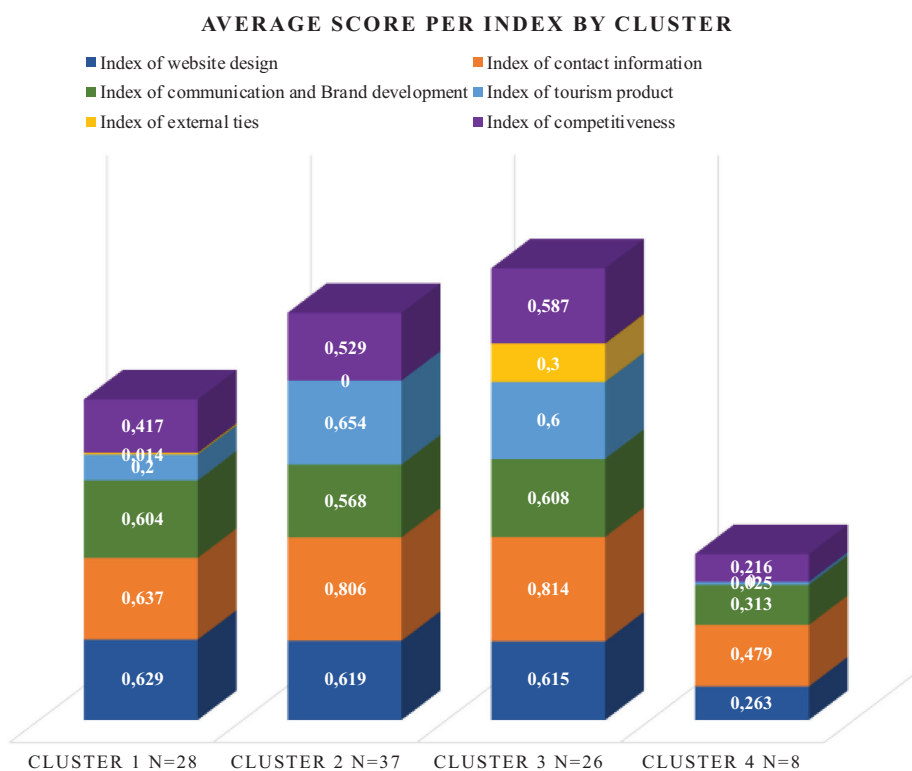
Indices	N	Minimum	Maximum	Mean	Std. deviation
Index of website design and navigability	99	0.10	1.00	0.5919	0.17995
Index of contact information	99	0.00	1.00	0.7340	0.20471
Index of communication and brand development	99	0.10	1.00	0.5677	0.17947
Index of tourism product	99	0.00	1.00	0.4606	0.28920
Index of external ties	99	0.00	0.60	0.0828	0.14849
Index of competitiveness	99	0.06	0.80	0.4874	0.12813

Source: Own work

Table 4. Summary of cluster analysis

Indices	Cluster 1 N = 28	Cluster 2 N = 37	Cluster 3 N = 26	Cluster 4 N = 8	Total	F	p-value
Index of website design	0.629	0.619	0.615	0.263	0.592	13.469	0.000
Index of contact information	0.637	0.806	0.814	0.479	0.734	12.224	0.000
Index of communication and brand development	0.604	0.568	0.608	0.313	0.568	7.411	0.000
Index of tourism product	0.200	0.654	0.600	0.025	0.461	58.240	0.000
Index of external ties	0.014	0.000	0.300	0.000	0.083	106.767	0.000
Index of competitiveness	0.417	0.529	0.587	0.216	0.487	60.390	0.000

Source: Own work



Source: Own work

Figure 3. Average score per item by cluster

- (1) Cluster 1: “Production-focused wineries” (28.3% of wineries). These wineries stand out from the rest, particularly because they have a low average score for the tourism product index (0.200) and an almost nonexistent average score regarding external ties index (0.014). The other indices, including the competitiveness index, are close to the global average. These results indicate that the wineries in this cluster are particularly focused on developing their core activities of wine production and sales, with little emphasis on diversifying into wine tourism.
- (2) Cluster 2: “Tourism-focused wineries” (37.4% of wineries). This is the largest group. This group is characterized by consistently above-average scores on both the tourism product index (0.654) and competitiveness index (0.529), as well as high average scores on the contact information index. However, they lack external ties. These results suggest that these wineries are highly diversified and focused on wine tourism, yet they fail to capitalize on potential opportunities stemming from vertical and horizontal strategic alliances with other actors in the tourism sector.
- (3) Cluster 3: “Top wine tourism wineries” (26.3% of wineries). These wineries consistently achieve the highest average scores in all the areas studied. Specifically,

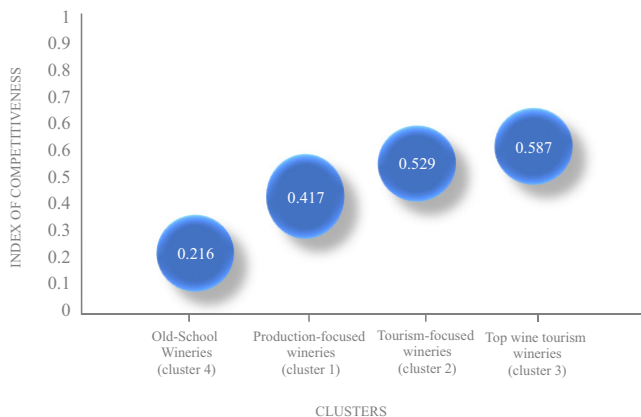
it can be observed that this is the cluster with a higher average score in the competitiveness index. This group demonstrates a clear focus and specialization in wine tourism, particularly distinguished from other clusters by their high average score in the external ties index.

- (4) Cluster 4: “Old-school wineries” (8.1% of wineries). This is the smallest cluster and represents the least common strategy among the wineries studied. It is characterized by low scores on all indices, including a competitiveness index that is significantly lower than other cluster groups. Results indicate that wineries in this cluster are primarily focused on wine production and sales, with their websites playing a minor role in supporting the promotion and commercialization of their products.

Figure 4 also illustrates the relationship between the strategies performed by each cluster and their impact on their competitiveness. Results reveal a relevant pattern, where clusters of wineries focused on wine selling strategies tend to be less competitive than those oriented toward a diversification strategy involving tourism-related activities. Therefore, wine tourism activities represent a competitive advantage for wineries, but also for the destination, as a whole (Scorrano *et al.*, 2018; Rasch and Gretzel, 2008).

Table 5 presents the results of the cluster analysis by geographical area. The association test was conducted, and the results suggest that there is a significant association between these two variables (Phi and Cramers’ V = 0.49; *p*-value < 0.000). Regarding the composition of the clusters in terms of geographical area, it appears that most of the wineries in Cluster 2 are located in the Empordà region, while the most part of wineries in the other three clusters are located in the Roussillon region. These findings could indicate that the wine industry in the Roussillon region is more decentralized and showcases a wider range of marketing strategies, in contrast to the more concentrated strategic approach observed in the Empordà region (Figure 5).

Furthermore, the average scores for each item by region are statistically significant, with a *p*-value less than 0.001. Comparing the results for the two regions (Roussillon and



Source: Own work

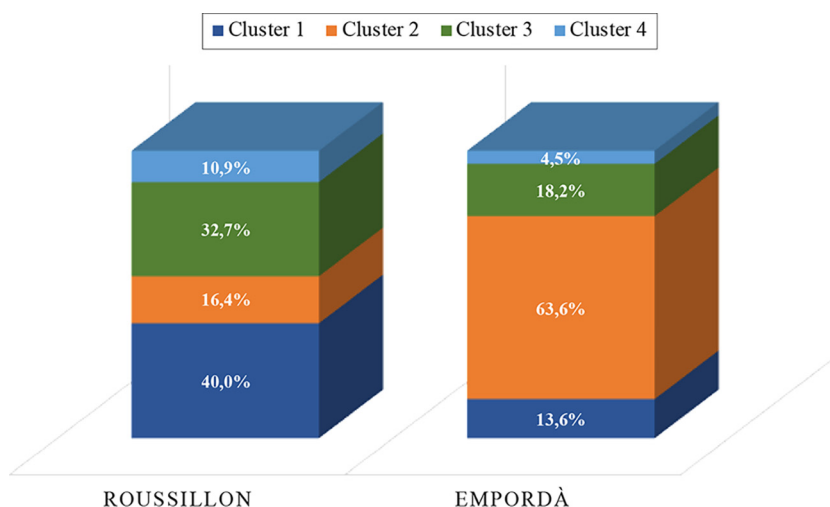
Figure 4. Index of competitiveness by cluster

Table 5. Clusters by wineries' region

Clusters	Roussillon		Empordà		n	Total %
	n	%	n	%		
Cluster 1	22	78.60	6	21.40	28	100.00
Cluster 2	9	24.30	28	75.70	37	100.00
Cluster 3	18	69.20	8	30.80	26	100.00
Cluster 4	6	75.00	2	25.00	8	100.00
Total	55	55.60	44	44.40	99	100.00

Notes: Phi and Cramers' V = 0.49; *p*-value < 0.000

Source: Own work



Source: Own work

Figure 5. Size of clusters by region

Empordà), the websites in THE Roussillon tend to have higher scores for most of the indices than those in the Empordà. However, there are some exceptions, such as the index of tourism products, where the scores for both regions are similar.

With regard to the results by cluster (Table 6), we can see that in Cluster 1, the websites in Roussillon have higher scores for “communication and brand development” and “contact information,” while the Empordà wineries have higher scores for the “website design.” The “tourism product” index is very low for both regions, and the “external ties” index is slightly higher for Roussillon. In this case, the competitiveness index is slightly higher for Roussillon wineries. In Cluster 2, Roussillon websites have higher scores for “contact information” and “web design,” while the average score for “communication and brand development” is higher for Empordà websites. The “tourism product” index is higher for those wineries belonging to the Empordà region. “External ties” index in both cases is null. In Cluster 2, the competitiveness index is slightly higher for the Empordà wineries. In Cluster 3, the Empordà websites have

Table 6. ANOVA. Means by cluster and region

Clusters	Region	Index of website design	Index of contact information	Index of communic./ branding	Index of tourism product	Index of external ties	Index of competitive-ness
Cluster 1	Roussillon	0.6227	0.6515	0.6045	0.2000	0.0182	0.4194
	Empordà	0.6500	0.5833	0.6000	0.2000	0.0000	0.4067
	Total	0.6286	0.6369	0.6036	0.2000	0.0143	0.4167
Cluster 2	Roussillon	0.6444	0.9074	0.5556	0.4889	0.0000	0.5193
	Empordà	0.6107	0.7738	0.5714	0.7071	0.0000	0.5326
	Total	0.6189	0.8063	0.5676	0.6541	0.0000	0.5294
Cluster 3	Roussillon	0.6056	0.7963	0.5889	0.5111	0.3333	0.5670
	Empordà	0.6375	0.8542	0.6500	0.8000	0.2250	0.6333
	Total	0.6154	0.8141	0.6077	0.6000	0.3000	0.5874
Cluster 4	Roussillon	0.2167	0.4444	0.3000	0.0333	0.0000	0.1989
	Empordà	0.4000	0.5833	0.3500	0.0000	0.0000	0.2667
	Total	0.2625	0.4792	0.3125	0.0250	0.0000	0.2158
Total	Roussillon	0.5764	0.7182	0.5582	0.3309	0.1164	0.4600
	Empordà	0.6114	0.7538	0.5795	0.6227	0.0409	0.5217
	Total	0.5919	0.7340	0.5677	0.4606	0.0828	0.4874
F		13.469*	12.224*	7.411*	58,24*	106.767*	60.39*

Note: p-value < 0.001

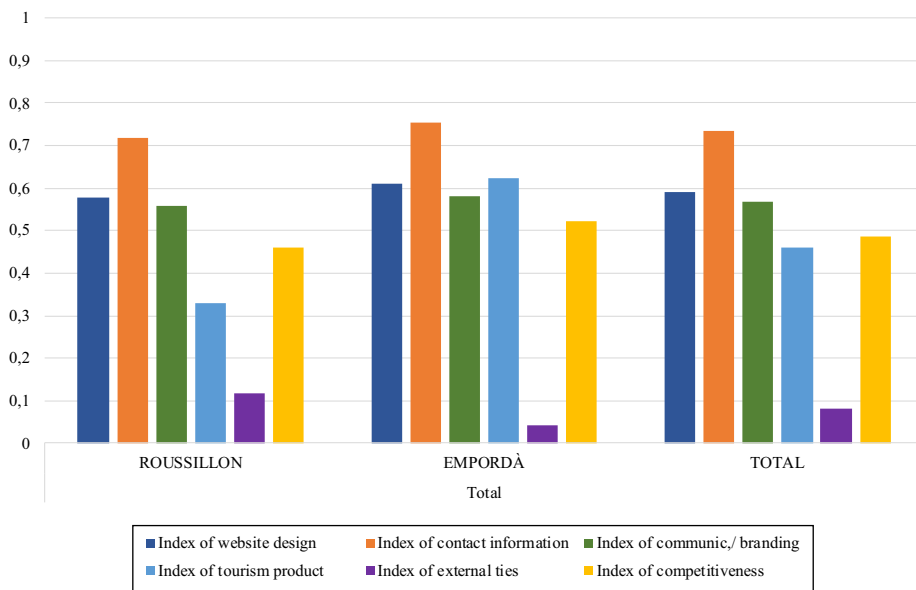
Source: Own work

higher scores for all the indices, in exception of the “external ties” index, which is higher for the Roussillon region. Consequently, the competitiveness index is higher for the Empordà region. Finally, in Cluster 4, the scores for all the indices are low for both regions, in comparison with the other clusters. However, it seems that the Empordà wineries have higher scores for “website design,” “contact information” and “communication and brand development,” while the Roussillon wineries have a higher score for the “tourism product” index. As a result, the competitiveness index is higher for those wineries located in the Empordà region.

These results suggest not only the existence of different winery profiles representing four different marketing strategies toward wine tourism, but also reveal significant differences when comparing two wine regions. Findings also reveal that “tourism product” and “external ties” are influential factors of wineries’ tourism orientation strategy as it is depicted in Figure 6. This emphasizes Hall’s (1998) idea that rural areas can be developed through a tourism-oriented strategy, which helps to improve the competitiveness of the region (Mancino and Presti, 2012).

Conclusion

Analyzing wineries’ marketing strategies in two wine regions (Roussillon and Empordà) is the scope of this study by means of a website content analysis in terms of wine tourism strategic orientation; focusing at the same time on the potential differences between these two regions. From a theoretical point of view, this research contributes to the development of knowledge on regional studies, strategic academic literature and wine tourism by focusing on marketing strategies. This research opens a new avenue to better understand the importance of the diversification strategy to increase the competitiveness of wineries, but also offers new perspectives on the strategy of wineries located in similar geographical areas.



Source: Own work

Figure 6. Performance index by region

The contribution of this paper is fivefold, understanding: (a) wineries' wine tourism strategic orientation, (b) the importance of external ties, (c) levels of competitiveness, (d) geographical differences and (e) website marketing practices.

First, four different marketing strategic orientations (clusters) are carried out by wineries of the two tourism destinations included in this study. Two of them were mainly focused on wine commercialization and the other two are oriented on a clear diversification strategy by incorporating wine tourism into their product portfolios, following strategic theory requirements. These findings highlight different levels of tourism product development among wineries, in line with previous research (Canovi, 2019; Koch *et al.*, 2013; Boatto *et al.*, 2013; and Hojman and Hunter-Jones, 2012). Several reasons can explain these differences. On the one hand, a lack of skills, high marketing costs, small-size and/or fear of identity loss (Canovi, 2019; Vrontis *et al.*, 2011). Similarly, it may be due to the lack of involvement of the wineries in the promotion and commercialization activities carried out by the DMO (Camprubí and Galí, 2015; Wargenau and Che, 2006). Considering these elements, it is plausible to suggest that these differences may stem from the fact that both regions are at different stages of their life cycle, as observed by Tomljenović and Getz (2019) in the context of Croatia or Ferreira (2019) in South Africa.

Second, the findings also reveal the relevance of strategic alliances by considering the multiplicity of actors within a destination, as it was stated by Wang and Xiang (2007) and Tinsley and Lynch (2001). In this study, it has been demonstrated that external ties have the capacity to compensate for low levels of efficiency in other areas such as tourism product performance (e.g. Cluster 3), thus contributing to the development of higher levels of wine business competitiveness (Vrontis *et al.*, 2011). Concerning destinations, the development of collaborations among actors appears essential to "enable the destination to succeed in the long run" (Wang and Xiang, 2007, p. 75). Thus, beyond the individual contribution to the wineries, the tourism-oriented strategy of wineries benefits all stakeholders in the region (Carlsen, 2004; Rasch and Gretzel, 2008) and helps to establish an identity for the region, strengthening its position as a wine tourism destination (Conto *et al.*, 2014). In other words, a diversification strategy has implications not only for individual results but also for collective outcomes. However, this study shows that a relevant number of wineries may have missed the opportunity to improve the guest experience by providing easy access to other services and attractions (Marzo-Navarro and Pedraja-Iglesias, 2021).

With reference to the above, this study confirms that the degree of diversification adopted has an impact on the competitiveness of wineries (Mancino and Presti, 2012). In particular, the competitiveness index helps to identify how competitive each cluster is in terms of its online marketing strategies and involvement in the wine tourism sector. The higher the competitiveness index score, the more competitive the cluster is perceived to be, indicating a higher level of effectiveness in attracting and engaging visitors through its online presence and tourism offerings. Therefore, these results suggest that a strategic orientation toward wine tourism gives wineries a competitive advantage over wineries that have not bet on a diversification strategy, as mentioned by Scorrano *et al.* (2018). This context does not represent a static picture, but may change over time depending on whether other wineries decide to diversify their product portfolio toward wine tourism, as suggested by Boatto *et al.* (2013).

Additionally, this study provides specific knowledge at a geographical level by comparing two wine regions. Even if the wineries in France and in Spain are very similar (Ibàñez Rodríguez, 2014), the results show that there are differences between the regions in terms of the wine tourism strategies adopted. The results show a more balanced distribution between the number of wineries and the strategies adopted by the Roussillon wineries, some

of them with an essential wine production orientation (Cluster 1) or some others with a “top wine tourism wineries” (Cluster 3). In contrast, in the case of the Empordà, wineries are mainly associated with a strategy of “tourism-focused wineries” (Cluster 2). There is a very small number of wineries in both destinations that do not have any wine tourism orientation and a low use of online tools (Cluster 4). If it is considered that the “top wine tourism wineries” strategy is the most efficient strategy in terms of competitiveness, results show that Empordà needs to strengthen its external ties within the regional tourism ecosystem with the support of DMO to encourage more wineries to adopt this strategy.

Furthermore, the website is recognized as being an essential tool to support the marketing strategy of businesses (Buhalis and Law, 2008), thus conditioning competitiveness. Findings reveal that in general terms wineries websites can improve information provided, since visitors when seeking information try to compile as much information as possible about the wine itself and features of the wine region (Marzo-Navarro and Pedraja-Iglesias, 2021). This is particularly important in Cluster 4, where the potential of the website as an effective communication tool to disseminate and promote not only individual wineries but also the wine region as a whole is not fully exploited. According to Batat (2016), in a context of growing competition, tourism destinations need to rethink their promotion and enhancement strategies, to increase their attractiveness; and the importance of information and communication technologies in business strategies is no longer to be demonstrated (Scorrano *et al.*, 2018).

This study is not free of limitations. Since this study relies on existing theoretical frameworks to analyze wineries’ marketing strategies. These frameworks might not fully capture the unique dynamics and complexities of the wine tourism industry, leading to potential oversimplification or misinterpretation of the findings. More particularly, this study has been limited to identifying the marketing strategic orientations of wineries in two regions through websites’ analysis and its influence on their competitiveness. Therefore, it is crucial to gain an in-depth understanding of why wineries are oriented toward one strategy or another and what factors influence their strategic orientation. In this sense, a qualitative study based on in-depth interviews with decision-makers from wineries in both territories might provide insight into motivations and constraints that guide wineries in their strategic decision-making process; and in turn, the role of DMOs and other tourism stakeholders in this strategic process in the regional context. In addition, the study defines competitiveness mainly in terms of online marketing strategies and involvement in wine tourism. However, competitiveness in the wine industry could be influenced by a wider range of factors, such as product quality, distribution channels, pricing strategies or profits, among others. The narrow focus on online marketing could overlook other important dimensions of competitiveness, which must be considered in future research.

Finally, relevant managerial implications for both wineries and regional DMOs are also derived from this study, providing guidance on strategic orientations. Therefore, the managerial implications of this study enable wine tourism managers to make strategic decisions that can enhance their competitiveness, customer engagement and long-term success. First, the recognition of the importance of external relationships and collaborations within a destination underscores the need for proactive networking and partnership-building. By understanding the significance of these relationships, managers can actively seek partnerships with other stakeholders in the tourism ecosystem (Ramos *et al.*, 2018). Managers can leverage these relationships to enhance their winery’s visibility and access to resources, ultimately contributing to improved competitiveness. Second, the study emphasis on website utilization highlights the significance of an effective online presence. Managers can optimize their websites to attract and retain potential visitors, facilitating direct sales and

boosting revenue. They may consider investing in website improvements. Optimizing their online platforms can help wineries attract and engage potential visitors, ultimately driving more tourism-related revenue. Third, the acknowledgment of geographic variations in strategy and performance enables managers to tailor their approaches to their specific regions, considering local characteristics and market dynamics.

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