UNIVERSITÀ POLITECNICA DELMARCHE

FACOLTÀ DI ECONOMIA “GIORGIO FUÀ”

Master Double Degree in International Economics and Commerce and Maestría en Administración de Empresas

EXPRESSING THE VALUE OF TERROIR: A STRATEGIC APPROACH TO WINERY INTERNATIONALIZATION THROUGH WINE TOURISM FOR MARCHE WINERIES

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Academic Year 2024/2025

To my family, friends, and loved ones,

for walking with me, even from afar.

To U.N.L., my Argentine university,

for providing me with a public, high-quality, and free education.

To U.N.I.V.P.M.,

for welcoming me with generosity and the opportunity to look beyond.

To those who offered their time and testimony,

confirming that true growth happens through community and shared synergy.

Above all, to God,

for encouraging and sustaining the steps of this restless heart.

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ABSTRACT (ENGLISH)

Wine production has long been one of Italy's most emblematic economic and cultural activities. However, the sector is currently facing structural challenges, including a sustained decline in per capita consumption and increasing market saturation. In this context, value-driven strategies, based on quality, narrative depth, and internationalization, are gaining importance. This study explores the potential of enotourism as a strategic lever to strengthen the international positioning of artisanal wineries in Marche, a region with high-quality but underrecognized wine production.

The research adopts a mixed-methods approach. The first chapter outlines the theoretical framework, grounded in literature on the experience economy, international trade, and strategic innovation. The second chapter analyzes key sectoral trends in Italy and Marche. Chapter 3 presents a strategic diagnosis of the region using data from the *Slow Wine Guide 2025* and a survey conducted with local producers. Chapter 4 introduces a business model that connects immersive visits with export pathways, supported by interviews with wineries interested in a pilot phase.

The analysis concludes with reflections on implementation and includes an annex with empirical materials. The project aims to foster export-oriented growth through meaningful visitor engagement, contributing to the visibility and sustainability of Marche's viticulture.

ABSTRACT (ESPAÑOL)

La producción de vino ha sido históricamente una de las actividades económicas y culturales más representativas de Italia. No obstante, el sector enfrenta actualmente desafíos estructurales, como la caída sostenida del consumo per cápita y la creciente saturación del mercado. En este contexto, adquieren relevancia estrategias centradas en el valor, que priorizan la calidad, el relato y la internacionalización. Este estudio analiza el potencial del enoturismo como herramienta estratégica para mejorar el posicionamiento internacional de bodegas artesanales en Marche, una región con vinos de alta calidad y limitada proyección global.

La investigación adopta un enfoque metodológico mixto. El primer capítulo presenta el marco teórico a partir de literatura sobre economía de la experiencia, comercio internacional e innovación estratégica. El segundo examina tendencias clave del sector en Italia y Marche. El tercer capítulo ofrece un diagnóstico regional basado en datos de la *Guía Slow Wine 2025* y en una encuesta a productores locales. El capítulo final propone un modelo de negocio que vincula visitas inmersivas con canales de exportación, apoyado en entrevistas a bodegas interesadas en una fase piloto.

El análisis concluye con reflexiones sobre su aplicación y un anexo con el material empírico. El proyecto apunta a fortalecer la conexión entre experiencia turística y desarrollo comercial vitivinícola.

INTRODUCTION

Wine is not only one of Italy's most emblematic products, but also a central pillar of its economy, culture, and international image. As of 2023, the country remained the world's leading wine exporter by volume, with over 22.1 million hectoliters shipped globally and total exports exceeding EUR 8 billion (ICE, 2024). Beyond its economic impact, however, Italian wine represents centuries of agricultural know-how, regional diversity, and symbolic capital, shaping both local identities and national prestige. The European Union as a whole, continues to dominate global production, with Italy, France, and Spain at the core of an industry that still contributes significantly to rural development, trade, and tourism.

However, this centrality is now being challenged by a complex set of structural shifts. Global wine production in 2023 fell to 244 million hectoliters, its second-lowest level since 1961, while world consumption dropped to 221 million, the lowest since 1996 (OIV, 2024). Italy mirrored this trend, with its production dropping by 23% year-on-year and domestic consumption reaching its lowest level since 1980. These shifts reflect not only adverse weather conditions and cyclical pressures but also long-term behavioral changes: rising health consciousness, declining per capita consumption among younger demographics, and increased competition from alternative beverages such as craft beer and spirits.

Amid this decline in volume, however, a counter-trend has gained strength: a transition from mass consumption to value-driven, experience-rich engagement with wine. In response, Italian producers have increasingly embraced premiumization, sustainability, and direct-to-consumer (DTC) models. High-end wines such as Barolo and Brunello di Montalcino have seen strong export growth, while organic wine production now accounts for 34% of Italy's vineyards (UIV, 2024). These changes signal not merely an economic adaptation, but a broader cultural shift: a new emphasis on authenticity, narrative, and personal connection over price and volume.

Strategic Opportunity: Wine Tourism as a Relational Interface

Wine tourism emerges as a strategic response to these dynamics. It creates immersive experiences that connect visitors with the people, places, and stories behind the wine, transforming consumption into a form of cultural participation and emotional engagement. Through this lens, wine becomes not only a product but a vector of identity, and tourism becomes more than leisure: it becomes a tool for territorial branding, rural valorization, and long-term commercial activation.

This potential is especially relevant for regions like Marche, which remain underrepresented in Italy's enotourism map despite offering a high concentration of DOC and DOCG wines, a rich historical and cultural landscape, and a dense network of small, artisanal producers. The region's relatively limited international exposure, often framed as a weakness, can be reinterpreted as an opportunity for differentiation, particularly among high-affinity visitors seeking exclusivity, authenticity, and meaningful connection. In this context, wine tourism becomes not only a source of immediate income but also a strategic channel to foster export relationships, bypass intermediaries, and enhance symbolic capital through direct experience.

The present study explores how a hybrid enotourism-export model, grounded in curated, high-value experiences, can unlock the commercial and reputational potential of Marche. By focusing on international visitors, especially trade professionals such as restaurateurs and boutique importers, the project seeks to demonstrate that enotourism can function as an interface between place-based storytelling and global market integration. Rather than scaling volume, the model proposes to scale trust, narrative, and direct access.

Objectives and Methodological Approach

The primary objective of this work is to design a **business project** capable of positioning Marche as a reference point for international wine tourism, while simultaneously creating a viable pathway for export-oriented growth among small-scale producers. The proposed model is rooted in the principles of the experience economy (Pine & Gilmore, 1999), strategic destination branding, and the Business Model Canvas framework (Osterwalder & Pigneur, 2010), adapted to the specific socio-economic and territorial characteristics of the region.

Methodologically, the research follows a mixed-methods approach, combining:

- A comprehensive literature review on enotourism, niche tourism, premiumization, and wine business models.

- Comparative analysis of leading international wine regions (Tuscany, Napa Valley, Mendoza, Margaret River, etc.)
- The use of Slow Wine 2025 as a primary database to map the structural profile and quality recognitions of regional producers.
- A quantitative survey administered to wineries in Marche, focusing on their readiness for enotourism and internationalization.
- In-depth interviews with a subset of producers to validate and enrich the proposed model with grounded insights.

Structure of the Study

The work is structured in four chapters, each addressing a different analytical layer of the research question:

- Chapter 1 lays out the theoretical foundations of niche tourism and wine-related business models. Drawing on classical and contemporary sources, it traces the evolution of enotourism, the concept of premium value in tourism, and the structural characteristics of DTC models and collaborative governance. This framework provides the conceptual lens through which the opportunity in Marche is later interpreted.
- Chapter 2 presents a comparative market analysis of global wine tourism destinations, identifying key strategic patterns in experience design, visitor segmentation, and positioning. It also reviews consumer trends, psychographic profiles, and regulatory aspects related to international wine

commerce. This benchmarking exercise sets the stage for evaluating the distinctive potential of Marche.

- Chapter 3 offers a strategic diagnosis of Marche, combining secondary data with primary fieldwork. The region's production structure is analyzed in terms of surface area, output, and typology, using the *Slow Wine* guide as a consistent and value-aligned reference. A structured survey was conducted with local producers to assess their enotourism practices, export experience, and openness to new models. These findings are complemented by a SWOT analysis and contextualized within broader regional and institutional dynamics.
- Chapter 4 develops the business model design, articulating a concrete and adaptable strategy to activate the region's symbolic, relational, and commercial potential. The model integrates experiential design, post-visit export pathways, operational coordination, and financial feasibility. It is supported by qualitative insights from interviews with producers already engaged or interested in the proposed framework, highlighting both enthusiasm and practical constraints. The chapter concludes with a set of evolutionary scenarios and resilience mechanisms designed to ensure adaptability under uncertain market conditions.

The present study concludes with a synthesis of the main findings, critical reflections on the model's limitations, and potential directions for future research and implementation. An annex is also provided, containing the full set of empirical materials, including interview transcripts, the producer survey instrument, and supporting documentation, ensuring transparency and methodological rigor. Additionally, selected visualizations, graphics, and grammatical refinements were developed or supported using artificial intelligence tools, enhancing the clarity and communicative effectiveness of the final output. This structure aims to offer both analytical depth and practical relevance in addressing the evolving intersection of wine tourism and international commerce.

CHAPTER 1: Theoretical Foundations of Niche Tourism and Wine Business Models

1.1 Evolution of Enotourism: From Mass Tourism to Exclusive Experiences

The evolution of wine tourism, or enotourism, reflects broader socioeconomic changes and shifts in consumer behaviour over recent decades. Originally, wine tourism was a marginal, almost incidental activity for wineries, an extension of mass tourism characterized by standardized tours and brief tastings aimed primarily at local visitors and wine enthusiasts (Getz, 2000). This initial phase, sometimes referred to as the Incubation Period (pre-1980s), was marked by unstructured, ad-hoc visits in which wineries considered tourism a secondary activity rather than a strategic revenue stream (Carlsen, 2004).

With globalization and rising consumer expectations, the industry entered what has been termed the Commodification Era (1980s–1990s). During this phase, regions such as Australia's Hunter Valley and California's Napa Valley formalized their cellar door operations and established quality benchmarks that transformed ad-hoc visits into well-organized, repeatable experiences (Winemakers' Federation of Australia [WFA], 1998; Carlsen, 2004). Pioneering figures like Robert Mondavi demonstrated the economic potential of structured public tours, attracting tens of thousands of visitors annually.

The subsequent Differentiation Phase (2000s–2010s) integrated wine tourism into broader destination marketing frameworks. Established wine regions in Europe, such as Bordeaux and Tuscany, began to offer immersive experiences that combined wine tasting with gastronomy, art, and cultural performances. These experiences were supported by theoretical models such as Dodd and Beverland's (2001) Wine Tourism Lifecycle, which identified a series of stages from establishment to reinvention and highlighted the need for constant innovation.

In recent years, enotourism has entered what scholars call the Premiumization Era (2020s–present), characterized by ultra-personalized, high-value experiences. Modern enotourism goes beyond mere tastings, offering transformational encounters that merge oenological education with lifestyle enhancement. For instance, experiences in Burgundy (France) may include exclusive tastings of rare vintages with prices reaching up to €5,000 per person, appealing to high-net-worth individuals who seek authenticity and immersive cultural engagement (Wine Intelligence, 2023). In this era, wineries and destinations leverage digital technologies, sustainability practices, and refined storytelling to differentiate their offerings and create memorable experiences that reinforce a region's terroir and identity (Pine & Gilmore, 1999).

The evolution of enotourism reflects not only sector-specific developments but also broader transformations within the tourism industry. From a theoretical perspective, scholars have noted a progressive shift from standardized, mass-market offerings toward more personalized, meaningful, and participatory travel experiences. Cohen (1988) identified multiple tourist typologies, ranging from recreational to existential, which help explain the emergence of visitors who actively seek authenticity and transformation rather than passive consumption. Building on this, Pine and Gilmore (1999) proposed the influential framework of the "Experience Economy," which conceptualizes tourism as a staged encounter designed to elicit emotional, aesthetic, educational, and escapist responses. These evolving expectations are further contextualized by Richards (2011), who argues that the rise of "creative tourism" reflects a growing demand for co-created, culturally embedded experiences. In this context, wine tourism has transitioned from a peripheral, incidental activity into a dynamic niche segment capable of delivering extraordinary and memorable encounters (Goolaup & Mossberg, 2017). Digital transformation has further accelerated this evolution, enabling the delivery of hyper-personalized experiences through technological innovations such as interactive platforms, storytelling tools, and virtual pre-visit immersion (Buhalis & Law, 2008).

Additionally, recent academic research emphasizes that enotourism has become a vital instrument for regional economic diversification and social regeneration. Studies in countries like Chile (Zamora & Barril, 2007) and emerging markets in Asia indicate that the evolution of enotourism is closely linked to changes in consumer lifestyles, an increased focus on sustainability, and the desire for culturally enriched travel experiences. These dynamics compel destinations such as Marche to adapt their tourism models in order to capture a discerning, globally mobile audience those values both: exclusivity and authenticity.

Building upon this, Dodd and Beverland (2001) also proposed a microeconomic, organizational life cycle model to further understand winery tourism development strategies. In case studies of three wineries (in Australia, New Zealand, and Texas) they developed a five-stage model 'from the ground up' of winery tourism life cycle stages and the internal and external characteristics of each stage. The five stages identified were:

- Winery establishment.
- Winery recognition.
- Regional prominence.
- Maturity.
- Tourism decline.

The factors that characterize each stage were based on visitor types, facilities provided, community networking, sales and pricing, brand awareness, size and structure and cellar door media coverage. This model was found to have some limitations in that some wineries may have unique development paths depending on their size and ownership, so further testing of the model was recommended.

Winery establishment marks the foundational phase of wine tourism development. At this point, wineries primarily focus on production and product quality, with limited attention to tourism. Any visitor interaction is incidental and typically informal, lacking structured activities or dedicated infrastructure. The brand is still emerging, and there is minimal integration with the broader tourism ecosystem.

In the *winery recognition* stage, producers begin to attract more consistent visitor flows, often as a result of improved wine quality, local media exposure, or inclusion in nascent wine routes. Basic tasting rooms are developed, staff are trained for customer interaction, and informal tours become more frequent. Tourism is no longer incidental but still secondary to wine production.

Regional prominence occurs when a winery evolves into a key player within its region's tourism offering. It engages in active marketing and partnerships with local stakeholders such as restaurants, hotels, and tourism offices. The winery becomes a destination, offering curated experiences like food pairings, guided vineyard walks, or themed events. Its identity contributes meaningfully to regional branding efforts.

The *maturity* phase is defined by well-developed infrastructure, a high degree of professionalization, and stable visitor demand. Wineries in this stage operate multiple revenue streams, direct sales, events, accommodation, and experiences, often supported by dedicated teams. However, the risk of stagnation increases as visitor expectations evolve, requiring ongoing innovation to remain competitive.

Finally, tourism *decline* sets in when wineries fail to adapt. Experiences may become repetitive, service quality may decline, and younger or more adventurous audiences may shift their interest elsewhere. External factors, such as economic downturns or regional image erosion, can accelerate this phase. Reinvention is critical to reverse the trend and avoid long-term disengagement.

To complement this microeconomic lens, Dodd and Beverland's model allows for a more granular assessment of winery development trajectories. While its sequential nature may not apply universally, it offers valuable insights into the evolution of wine tourism as a strategic function within wineries.

In the case of Italy, many leading wine regions, such as Tuscany and Piedmont, can be seen as operating within the Maturity phase. These areas offer consolidated tourism infrastructures, strong international reputations, and diversified experiences, but may face challenges related to overcrowding or standardization. Conversely, Marche appears to straddle the line between Winery Recognition and Regional Prominence, especially in subregions like Castelli di Jesi or Piceno, where enotourism initiatives are growing but still lack cohesive destination marketing and infrastructural support. This positioning highlights the region's strategic opportunity for differentiation and growth, particularly through experiential design and integrated partnerships, as further explored in Chapter 3.

1.2 The Concept of Premium Tourism and Its Role in Destination Branding

Premium tourism is defined by its emphasis on high-quality service, exclusivity, and deeply personalized experiences. In the context of wine tourism, premium offerings move beyond the conventional tasting room model to encompass luxury accommodations, bespoke gastronomic experiences, and culturally immersive itineraries (Getz, 2000). This shift not only enhances visitor satisfaction but also plays a critical role in destination branding by positioning regions as unique, high-value markets that can command premium pricing.

For destinations like Marche, positioning itself as a premium enotourism destination requires a multi-faceted strategy. First, it involves curating a portfolio of experiences that highlight the region's unique winemaking traditions, distinctive terroir, and rich cultural heritage. Examples include private vineyard tours, masterclasses in wine blending, and exclusive gastronomic events that integrate local cuisine with fine wines. Such strategies help create a strong, differentiated brand identity that appeals to affluent, experience-seeking travellers (Hall et al., 2000). Importantly, the concept of premium has evolved beyond traditional markers of wealth or material opulence. Contemporary luxury tourism increasingly values scarcity, authenticity, and personal meaning over conspicuous consumption (Yeoman, 2011). In this view, the most desirable experiences are those that are deeply rooted in place, culturally specific, and difficult to replicate, attributes that align closely with small-scale, artisanal wine regions such as Marche. The idea of luxury becomes less about extravagance and more about privileged access to cultural intimacy, craftsmanship, and human connection.

This evolving concept of luxury is not limited to European markets; it also finds resonance in Latin American contexts, particularly within Argentina's wine tourism sector. Drawing on empirical research in Mendoza, Fernández (2016) highlights how locally rooted practices, such as winemaker-led visits, regional culinary pairings, and small-scale craftsmanship, serve as defining elements of premium experiences. These encounters privilege authenticity and cultural specificity over lavishness, offering visitors a sense of privilege through intimacy and meaning. In a similar vein, Gómez and Morini (2021) emphasize the strategic role of symbolic capital and experiential depth in attracting international wine tourists to rural Argentine territories. Rather than relying on extensive infrastructure, they argue that value is created through narrative coherence, emotional engagement, and the personal identity of place. These findings reinforce the notion that premium tourism today is increasingly characterized by cultural immersion and human connection, rather than by material display or standardized luxury.

This redefinition of premium also resonates with the psychographic segmentation already discussed. Culturalists and connoisseurs, in particular, are drawn to authentic narratives, local expertise, and the symbolic value of tradition. For these segments, luxury is not found in marble floors or imported caviar, but in a masterclass led by the winemaker, a vineyard walks with the family behind the label, or a pairing dinner featuring heirloom recipes. By positioning itself as a destination that offers exclusive access to these authentic experiences, Marche can effectively differentiate its brand and cultivate a loyal base of high-value visitors. It is an opportunity that appeals to affluent, experience-seeking travellers (Hall et al., 2000).

Moreover, premium tourism increasingly relies on digital innovation. The integration of virtual reality (VR) tours, AI-driven personalized recommendations, and sophisticated booking platforms enhances the accessibility of these exclusive experiences while maintaining their bespoke character. Research indicates that digital engagement not only improves operational efficiency but also strengthens emotional connections with visitors by enabling tailored storytelling and immersive pre-visit experiences (Pine & Gilmore, 1999; Wine Intelligence, 2023).

Psychographic segmentation further refines premium tourism strategies by identifying distinct market segments based on motivations and preferences. Recent studies (Wine Intelligence, 2023) have identified segments such as connoisseurs, hedonists, culturalists, and status seekers, each requiring differentiated approaches in marketing and service design. For instance, connoisseurs value technical knowledge and rare vintages, while culturalists are attracted to heritage tours and historical narratives. These insights allow destinations to design targeted communication strategies that reinforce their premium brand and foster strong emotional bonds with diverse consumer groups.

Academic literature also underscores the importance of integrating luxury tourism with destination branding efforts. Branding models like the tripartite framework proposed by the Winemakers' Federation of Australia (2002) suggest that a destination's core product (the wine) must be augmented with ancillary experiences and services, such as luxury accommodations, wellness centers, and artisanal dining, to create a holistic and memorable visitor experience. This comprehensive approach not only enhances brand equity but also supports long-term economic sustainability by building a loyal customer base (Carlsen & Charters, 2006).

1.3 Wine Tourism as a Business Model: Economic Impact and Strategic Positioning

Wine tourism represents a multifaceted business model that generates both direct and indirect economic benefits. At the microeconomic level, wineries benefit from diverse revenue streams, including cellar door sales, premium tasting experiences, hospitality services (such as restaurants and on-site accommodations), and special events like weddings and corporate retreats. For example, cellar door operations can yield gross margins as high as 30–50%, in stark contrast to the 15–20% typically generated through wholesale channels (Dodd & Beverland, 2001). Premium experiences, including masterclasses and blending workshops, command prices ranging from €150 to €500 per person, further bolstering revenue streams (Wine Intelligence, 2023).

On a macroeconomic scale, wine tourism exerts a multiplier effect on regional economies. Studies have demonstrated that every €1 spent in wineries generates an additional €2.80 in ancillary expenditures related to accommodation, dining, and retail services (Hall et al., 2000). This effect contributes to job creation and stimulates the development of specialized roles such as wine educators, experience designers, and terroir interpreters. In regions like Marche, with its 63 indigenous grape varieties (e.g., Verdicchio, Pecorino, Lacrima), wine tourism can serve as a catalyst for both economic diversification and rural revitalization by attracting high-value visitors and promoting local products (Carlsen, 2004).

The economic relevance of wine tourism aligns with broader research on rural tourism as a driver of regional development. Scholars such as Sharpley and Roberts (2004) emphasize that rural tourism can stimulate economic diversification, counteract demographic decline, and support the valorisation of local culture and production systems. Wine tourism is particularly effective in this regard due to its embeddedness in local traditions and its capacity to generate value through both symbolic and material channels. As Lane and Kastenholz (2015) argue, successful rural tourism initiatives must balance economic goals with sociocultural and environmental sustainability, especially in areas, such as Marche, where preserving landscape and identity is central to long-term competitiveness.

In this regard, recent contributions from the Latin American context offer additional insight into the economic and symbolic value of wine landscapes. Girini (2017), analyzing the Mendoza wine region, argues that the vineyard landscape is not a passive backdrop but an active cultural and economic resource. She emphasizes that its configuration, combining traditional irrigation systems, Andean views, and architectural aesthetics, forms part of an immersive identity that is both marketable and deeply rooted in local heritage. This articulation between environment and narrative contributes not only to tourist satisfaction, but also to the territorial distinctiveness necessary for sustainable development. Her analysis suggests that leveraging landscape as a “cultural asset” allows rural regions to integrate environmental, economic, and symbolic capital in a mutually reinforcing strategy.

Strategic positioning in wine tourism involves calibrating product architecture, temporal management, and stakeholder integration. The product architecture typically follows a pyramid model where basic tastings form the base, followed by themed tours, immersive experiences, and, at the apex, bespoke luxury offerings. This tiered approach allows destinations to cater to a wide range of market segments while progressively guiding visitors toward higher-margin experiences (Carlsen & Getz, in press).

Temporal management is equally crucial. Seasonal fluctuations often present challenges, yet innovative regions have turned these into opportunities. For instance, winter ice-wine festivals in the Okanagan Valley have achieved high occupancy rates during the off-season by leveraging unique climatic conditions. Meanwhile, effective stakeholder integration, through collaborative clusters that include wineries, restaurants, artisans, and local governments, can significantly enhance the destination's appeal and ensure consistent quality across all touchpoints (Winemakers' Federation of Australia, 1998).

Recent academic research supports the view that integrating enotourism into a broader regional development strategy can create sustainable economic growth. Public–private partnerships, supported by government incentives and regional policies, are instrumental in building the necessary infrastructure and human capital to support premium tourism offerings. Case studies from Napa Valley, Burgundy, and emerging markets in Asia demonstrate how coordinated strategies can lead to substantial increases in visitor numbers, average spend, and overall economic impact (Sparks & Malady, 2006).

These dynamics underscore the importance of governance and coordinated strategic planning in wine tourism. The development of tourism clusters, defined as geographic concentrations of interconnected businesses and institutions, has been widely recognized as a strategy to foster innovation, consistency, and quality across the visitor journey (Porter, 1998; Novelli et al., 2006). Effective cluster-based models depend on mutual trust, shared branding, and the alignment of public and private interests. In regions like Marche, moving from fragmented efforts to cohesive collaboration will require structured governance mechanisms that encourage stakeholder co-creation, policy support, and joint investment in infrastructure, training, and marketing.

In the context of Marche, preliminary efforts among wineries to develop cooperative wine tourism packages and thematic wine routes reflect a growing recognition of the strategic benefits of collaboration. Although still fragmented, these initiatives signal the region's increasing readiness to adopt cluster-based development models, which have proven effective in other wine tourism destinations. However, one of the key challenges in implementing such models lies in the need for sustained coordination and cooperation among all stakeholders involved. From the public sector, responsible for maintaining the infrastructure necessary to welcome tourists, ensuring that roads are in good condition, and preserving historical sites that enrich the cultural immersion, to private actors such as wineries and hotels, success depends on a collective effort. High-quality services, complementarity between offerings, and a shared vision are essential to create an atmosphere of collaboration and community that elevates the entire destination.

1.4 Internationalization and Direct-to-Consumer (DTC) Wine Sales

Globalization and digital transformation have reshaped traditional wine sales models. Historically, the wine industry relied heavily on intermediaries that captured a significant share of the final retail price, leaving producers with relatively slim margins (Carlsen & Charters, 2006). However, the advent of direct-to-consumer (DTC) strategies, enabled by digital platforms and e-commerce, has disrupted this paradigm by allowing wineries to establish direct, lasting relationships with consumers.

The rise of DTC channels represents a structural reconfiguration of the wine value chain. As Mariani et al. (2014) argue, disintermediation enables producers to regain control over pricing, branding, and customer relationships, reducing dependency on opaque distributor networks and price-driven export markets. This empowerment is particularly valuable for small and medium-sized wineries, whose identity and artisanal value can be better communicated through direct, curated channels. DTC is not merely a commercial tool; it is a strategic lever for brand autonomy and long-term positioning in global markets.

DTC channels offer several strategic advantages. First, they enable wineries to secure higher margins, often averaging around 58% compared to 22% through traditional importers (Wine Intelligence, 2023). Data from Napa Valley indicate that top-quartile wineries derive over 60% of their revenue from DTC sales, a stark contrast to industry averages. Second, DTC models empower wineries to capitalize on customer relationship management (CRM) systems, which allow for hyper-personalization of marketing efforts and repeat purchase behaviour. For example, Oregon's Domaine Serene increased repeat purchase rates significantly by integrating tasting room interactions with e-commerce analytics.

From a marketing perspective, DTC strategies align with the principles of experience-based brand building and relationship marketing. As Pine and Gilmore

(1999) and Hollebeek et al. (2014) note, emotional engagement, sensory immersion, and co-creation of meaning are fundamental to building brand loyalty in experiential sectors like wine tourism. In this context, the cellar door becomes more than a point of sale, it acts as a gateway to a lasting, multi-touchpoint relationship. The integration of CRM, storytelling, and digital follow-up ensures continuity and deepens the consumer's personal connection to the brand, reinforcing purchase behaviour over time.

Digital ecosystem innovations, such as augmented reality (AR) applications and blockchain authentication, are also playing an increasingly prominent role in DTC strategies. AR experiences, like virtual vineyard tours, enhance consumer engagement by providing immersive, interactive content that connects visitors with the terroir. Blockchain technology, on the other hand, ensures product authenticity and transparency, a critical factor for premium consumers who demand verifiable provenance (Wine Intelligence, 2023).

Furthermore, international DTC strategies require wineries to navigate complex regulatory landscapes. The European Union's Digital Markets Act and variations in the U.S. three-tier system, for example, necessitate adaptive approaches that balance regulatory compliance with innovative marketing practices. For regions such as Marche, which hosts over 400 small producers, the strategic implementation of multilingual, mobile-optimized e-commerce platforms and "taste now, ship later" programs can be pivotal in overcoming logistical challenges and achieving scale in international markets.

Recent studies underscore the significance of DTC channels in sustaining winery growth and fostering long-term brand loyalty. By treating every visitor as the first step in a lifelong relationship, wineries can transform casual tourists into dedicated brand advocates. This approach not only bolsters immediate revenue but also contributes to a sustainable business model that is resilient in the face of market fluctuations and global economic uncertainties (Carlsen, 2004; Pine & Gilmore, 1999).

Further supporting the effectiveness of DTC strategies, empirical research demonstrates that the experiential dimension of wine tourism can lead to measurable changes in consumer behaviour. A study conducted by O'Mahony et al. (2006) revealed that approximately 20% of visitors to winery cellar doors reported changes in their wine consumption habits within five months of their visit. Among these, over 70% indicated they were consuming higher-quality wines, 66.7% increased the quantity purchased, and more than half were spending more per bottle. These shifts were not isolated: many consumers exhibited simultaneous changes across quality, quantity, and type of wine purchased, suggesting that the winery experience had a multidimensional influence on consumption patterns. This evidence highlights the potential of in-person engagement to deepen consumers' emotional connection with a brand and enhance perceived value. Notably, these changes occurred even in the absence of intensive digital follow-up, underscoring the power of authentic, sensory-rich interactions in shaping purchasing behaviour. The cellar door experience, therefore, serves as a crucial touchpoint, not only as a sales opportunity, but as a strategic moment to educate consumers, elevate brand positioning, and initiate lasting brand loyalty. This underscores the importance of integrating tourism-based experiences within broader DTC frameworks, particularly for small and medium-sized wineries seeking to differentiate themselves in increasingly saturated markets.

For small and medium-sized wineries in Marche, embracing DTC strategies presents both a challenge and an opportunity. These producers often operate with limited marketing budgets, modest brand visibility, and constrained digital capabilities, which can hinder their access to international markets. Nonetheless, the experiential nature of enotourism offers a valuable entry point: visitors who connect emotionally with a place and its people are more likely to become long-term customers. Leveraging that emotional bond through a hybrid approach, one that combines in-person experiences with post-visit digital engagement, can significantly enhance customer retention and revenue generation. Initiatives such as "taste and ship" programs, follow-up virtual tastings, personalized recommendations, or even seasonal subscription boxes can extend the wine tourism experience beyond the vineyard. These tools help maintain a narrative connection with the terroir and foster brand loyalty over time. To succeed, however, these efforts must be supported by reliable logistics, accessible multilingual e-commerce platforms, and shared marketing infrastructure. Without coordinated regional support and digital training programs, small producers may struggle to compete with larger, more tech-savvy players. Therefore, implementing inclusive and scalable DTC strategies is not just a commercial imperative, it is a strategic pathway to ensure that even artisanal wineries can thrive in the evolving landscape of global wine consumption.

However, the scalability and sustainability of DTC models for artisanal producers depend heavily on enabling ecosystems. As Fernández-Stark et al. (2012) emphasize in the context of small agro-exporters, access to logistics, training, multilingual platforms, and collective branding is essential for participating in global value chains. In regions like Marche, public–private collaboration, digital literacy initiatives, and shared e-commerce infrastructures can mitigate entry barriers and foster inclusive digital transformation. Without such systemic support, the potential of DTC to democratize market access remains unevenly distributed.

1.5 Collaborative Governance and Network-Based Destination Development

The development of wine tourism destinations increasingly depends not only on product quality and marketing strategies, but also on the capacity of local actors to coordinate their efforts under a shared vision. In this context, collaborative governance emerges as a crucial enabler of territorial competitiveness. Defined as "a process of joint decision-making among autonomous stakeholders to manage interdependencies and produce collective outcomes" (Ansell & Gash, 2008), collaborative governance allows for the integration of diverse interests, wineries, tourism agencies, municipalities, and cultural organizations, into a cohesive strategic framework.

In wine tourism, collaborative governance often materializes through cluster-based development models, where geographically concentrated groups of interlinked businesses and institutions work together to create added value. Porter (1998) was among the first to identify the strategic potential of clusters in enhancing regional innovation, productivity, and branding. More specifically within tourism, Novelli et al. (2006) show that clusters foster product complementarity, facilitate knowledge sharing, and enable coordinated marketing. These dynamics are particularly relevant for fragmented regions like Marche, where small-scale producers and local operators often struggle to gain visibility and scale individually. However, effective collaboration does not arise spontaneously. Dredge (2006) highlights that tourism governance requires formal structures that promote transparency, trust-building, and continuous communication among stakeholders. Successful examples such as the Margaret River Wine Association (Australia) or the Route des Grands Crus (Burgundy) show that shared standards, coordinated calendars of events, and unified branding platforms can elevate the entire destination. Without these mechanisms, even high-quality wine and experiences may fail to translate into long-term territorial competitiveness.

The concept of Destination Management Organizations (DMOs) has gained relevance as a framework to address the complexity of managing tourism destinations where multiple stakeholders operate independently. According to Baggio and Cooper (2010), DMOs are not merely promotional bodies, but strategic facilitators that coordinate planning, marketing, capacity-building, and service integration across a territory. Their effectiveness lies not in exerting control, but in orchestrating interactions between public and private actors, ensuring alignment of interests and shared quality standards.

Dredge (2006) highlights that DMOs can function as policy networks, helping destinations navigate tensions between economic development, heritage preservation, and local identity. In wine tourism, this role becomes even more significant due to the need to harmonize the agricultural, cultural, and experiential dimensions of the offer. A well-designed DMO structure can support smaller producers by providing access to joint booking platforms, training programs, international outreach, and bundled experiences. Moreover, it can act as a repository of collective memory and know-how, ensuring continuity across political cycles and leadership changes.

In Europe, successful cases such as Südtirol Marketing (Italy) or Visit Alsace (France) illustrate how regional DMOs can support brand cohesion and innovation while still respecting the diversity of local identities. For Marche, adopting a flexible, participatory DMO model would allow the region to leverage its fragmented but authentic enotourism assets into a coordinated, high-value system capable of competing on the international stage.

Ultimately, collaborative governance serves as the connective tissue that links the various components analyzed throughout this chapter: value proposition, branding, experience design, economic impact, and digital distribution. By aligning diverse stakeholders under a common narrative and strategic framework, network-based destination development enables wine regions to move from isolated efforts to coherent, scalable, and sustainable enotourism systems.

CHAPTER 2: Market Analysis and Strategic Opportunities

This chapter provides an in-depth examination of the current landscape in luxury wine tourism and highlights the strategic opportunities available for industry players. The analysis incorporates global trends in consumer behaviour, competitive dynamics across renowned wine regions, detailed target audience profiles, innovative experience design, and the regulatory/logistical issues associated with international wine shipping. The discussion is supported by a range of scholarly works and industry reports.

2.1 Global Trends in Luxury Wine Tourism and Consumer Behavior

Recent decades have witnessed a dynamic transformation in the global luxury travel market, wherein luxury wine tourism emerges as a microcosm of broader shifts in consumer behaviour and industry practices. This evolution is underpinned by a shift toward experiences over transactional service delivery (Pine & Gilmore, 1999; Schmitt, 1999), heightened consumer awareness of sustainability practices (Bramwell & Lane, 2013; Wine Intelligence, 2023), and advances in digital personalization (Kotler & Keller, 2016). Collectively, these trends have redefined high-end tourism, necessitating strategic adaptations from industry stakeholders.

Following Porter's (1980) competitive forces model, these global shifts can be seen as industry-wide pressures that reshape rivalry, buyer expectations, and barriers to entry in luxury wine tourism.

Experience-Driven Consumption

Contemporary luxury travellers have demonstrated a pronounced preference for immersive, high-quality experiences that transcend traditional offerings. Central to this shift is the emergence of the "experience economy," a conceptual framework that contends that consumers now value the holistic and emotionally resonant engagement of curated experiences over standardized service products (Pine & Gilmore, 1999). Industry reports and statistical data from the UNWTO (2020) underscore that this experiential shift is not only evident in leisure travel but is also particularly significant in niche segments like wine tourism. By integrating sensory-based encounters, such as personalized vineyard tours, exclusive tastings, and behind-the-scenes access, destinations can effectively create memorable narratives that foster strong emotional connections with visitors.

The emphasis on experience-driven consumption is supported by findings in several academic studies that demonstrate how multisensory experiences contribute to a deeper level of consumer engagement and brand loyalty (Schmitt, 1999; Pine & Gilmore, 1999). Such experiences are often designed to elicit both cognitive and affective responses, thereby enhancing the overall value proposition for the traveller. Furthermore, Roberts and Sparks (2006) and Beverland (2005) highlight the role of authenticity, emotional resonance, and narrative in enhancing perceived value and consumer attachment to place-based experiences. In luxury wine tourism, these experiences are increasingly tailored to not only showcase the heritage and craftsmanship of winemaking but also to incorporate elements of local culture and tradition, further enriching the visitor's experience.

Moreover, qualitative research in wine tourism emphasizes that visitors increasingly seek immersive, emotionally rich experiences that reflect a sense of place and personal identity (Roberts & Sparks, 2006). Elements such as direct interaction with winemakers, access to limited-production wines, and opportunities to participate in harvest or blending activities contribute to the uniqueness of the visit. These experiential dimensions create deeper affective connections and a sense of exclusivity that aligns closely with the expectations of luxury consumers.

Conscious Luxury and Sustainability

In parallel with the trend toward experiential travel, there has been a substantial rise in "conscious luxury", whereby high-end consumers increasingly demand ethically and environmentally responsible travel experiences. This paradigm shift reflects a growing awareness of global sustainability challenges and a desire among affluent travellers to align their consumption choices with broader social and environmental values. As illustrated by Wine Intelligence (2023) and corroborated by Bramwell and Lane (2013), sustainability is fast becoming a critical criterion in luxury market segmentation, influencing destination marketing, vendor selection, and even consumer loyalty.

High-end wine tourism destinations have responded by implementing sustainable practices across the value chain, from organic vineyard management and biodiversity conservation to renewable energy use in production facilities and eco-friendly hospitality operations. By integrating these practices, destinations not only meet the ethical expectations of modern luxury travellers but also secure a competitive advantage in a market where transparency and accountability are increasingly valued. This shift is also supported by broader trends in sustainable tourism research, which demonstrate that perceived sustainability can enhance the experiential quality and emotional resonance of a travel experience.

Roberts and Sparks (2006) also suggest that sustainability enhances the perceived authenticity of the tourism product. Consumers in high-end segments increasingly associate responsible practices, such as ecological vineyard management, fair labor conditions, and transparent storytelling, with superior quality and brand integrity. As Beverland (2005) argues, authenticity is co-constructed through narratives of provenance and ethical production, which are particularly persuasive in the luxury wine market.

Personalization and Digital Integration

Modern technological advancements have further propelled the evolution of luxury wine tourism by facilitating a high degree of personalization and on-demand digital integration. Today's luxury consumers expect tailor-made itineraries that reflect their individual preferences, whether these involve bespoke culinary pairings, exclusive vineyard access, or personalized storytelling sessions with winemakers. The integration of digital platforms has transformed traditional travel planning by enabling real-time customization, data-driven service enhancements, and seamless customer engagement throughout the traveller's journey (Kotler & Keller, 2016). Digital transformation is particularly pivotal in the context of luxury wine tourism, where digital tools such as mobile apps, virtual reality tours, and AI-powered recommendation systems are being utilized to anticipate and satisfy the unique preferences of affluent consumers. These technologies allow for an unprecedented level of interactivity and personalization; travellers can now receive bespoke recommendations based on their past behaviour and stated preferences, thereby enhancing the overall satisfaction and perceived value of the experience. Wine Intelligence (2023) further documents that such digital integration not only improves operational efficiency but also creates novel touchpoints for engagement that reinforce consumer loyalty and brand differentiation.

In addition, personalization extends beyond digital interfaces to include flexible service models and staff training focused on emotional intelligence. High-end visitors appreciate being recognized as individuals, and service encounters tailored to their interests, such as curated wine flights based on prior tastings or pairing menus informed by dietary preferences, enhance satisfaction and perceived value. According to Roberts and Sparks (2006), meaningful human interaction is often the differentiating factor that transforms a good visit into a memorable one.

The Interplay of Emerging Trends and Industry Implications

The confluence of experience-driven consumption, a heightened emphasis on sustainability, and advanced digital personalization necessitates continuous innovation from luxury wine tourism destinations. Operators must navigate these trends by investing in sustainable technologies, engaging in strategic partnerships with digital innovators, and adopting customer-centric approaches that prioritize experiential value over conventional service delivery. As the competitive landscape intensifies, destinations that excel at blending these elements will be best positioned to capture the evolving preferences of the affluent global traveller.

Furthermore, these trends contribute to a broader reconfiguration of consumer behaviour in luxury markets, where the boundaries between service, experience, and ethical consumption increasingly converge. The successful integration of these dimensions not only results in enhanced consumer satisfaction but also fosters a more resilient and adaptive tourism ecosystem, one that is capable of withstanding market fluctuations and global disruptions.

Strategic Takeaway

These evolving global trends redefine what constitutes value in luxury travel. For wine tourism destinations, the challenge lies in aligning experience design, ethical practices, and digital personalization in a way that resonates with the emotional and aspirational drivers of high-end consumers. Understanding these shifts is essential for crafting competitive and relevant tourism offerings in a rapidly transforming market.

These global trends not only reshape traveler expectations but also redefine the competitive dynamics among wine tourism regions, a comparative analysis of which follows below.

While European regions have historically dominated the symbolic capital of wine tourism, emerging destinations in Latin America offer valuable insights into alternative development paths. The case of Mendoza, Argentina, demonstrates how a region can transform natural assets and artisanal production into global relevance by emphasizing experience-based tourism, sustainability, and export synergy. Authors such as Fernández (2019) and Vázquez & López (2021) highlight the strategic alignment between boutique wine circuits, narrative marketing, and infrastructure investment, which enabled Mendoza to become a reference point for quality-driven, experience-rich enotourism in the Global South.

2.2 Competitive Analysis: Tuscany and Piedmont, Napa Valley, Mendoza, and Margaret River.

A comparative analysis of internationally renowned wine tourism destinations, Tuscany, Piedmont, Napa Valley, Mendoza, and Margaret River, demonstrates how different historical, cultural, and strategic factors shape their competitive positioning. These regions exemplify diverse models of success that provide actionable insights for emerging destinations seeking to enhance their global visibility and value proposition in the luxury wine tourism market.

Benchmarking and Competitive Advantage

Drawing on Porter's (1980) framework of competitive strategy, Tuscany and Piedmont represent archetypes of differentiation based on heritage, quality, and place-based branding. These regions have established sustainable competitive advantages by leveraging centuries-old viticultural traditions, UNESCO-recognized landscapes, and iconic appellations such as Chianti Classico, Brunello di Montalcino, Barolo, and Barbaresco. Their cultural capital and historic symbolism contribute to a deeply rooted emotional connection with consumers, turning the act of visiting into a form of cultural pilgrimage. This aligns with Pine and Gilmore's (1999) concept of the "experience economy," whereby the value of the product is amplified by the emotional and symbolic dimensions of the experience.

Both regions also benefit from institutional support and protected designation of origin (PDO) frameworks that reinforce quality assurance, authenticity, and brand prestige, key attributes in luxury markets (Tregear et al., 2007). The fusion of rural landscapes, gastronomy, and cultural heritage enhances the experiential dimension and contributes to high levels of place attachment and tourist satisfaction, which, in turn, strengthens word-of-mouth promotion and long-term brand equity.

Additionally, the concept of the “winescape” reinforces the competitive advantage of regions like Tuscany and Piedmont. This term refers to the integrated experience of landscape, architecture, cultural heritage, and wine culture

Innovation and Market Positioning

Napa Valley (USA), on the other hand, illustrates a different path to competitive advantage, one predicated on innovation, technological leadership, and marketing sophistication. Despite its relatively recent emergence in comparison to European regions, Napa has successfully positioned itself as a symbol of modern luxury and enological excellence. The region has embraced a customer-centric approach rooted in service innovation, architectural design, and premium visitor services, often incorporating wellness, sustainability, and fine dining into its offer.

This strategic orientation reflects elements of Kotler, Bowen, and Makens' (2016) perspective on destination marketing and experience design. Napa's wineries routinely invest in digital marketing, data analytics, and immersive storytelling, offering bespoke experiences such as private tastings, food pairings, and curated vineyard stays. Its “New World” narrative of entrepreneurial excellence and consistent quality control has enabled it to command premium prices and attract a global, affluent clientele. Furthermore, public-private collaborations such as Visit Napa Valley play a vital role in coordinating destination branding, investment attraction, and international promotion, reinforcing its visibility and coherence as a luxury tourism product.

Napa Valley also exemplifies the power of emotional branding in the luxury wine sector. Roberts and Sparks (2006) highlight how Napa's narrative blends innovation, relaxed sophistication, and exclusivity into a lifestyle identity that resonates with its clientele. Beyond wine, the destination integrates wellness, design, and hospitality into a seamless experience that appeals to high-net-worth individuals. The region's investment in iconic architecture and curated events further reinforces its reputation as a forward-thinking, high-end destination.

Emerging Destinations and Differentiation

In Argentina, Mendoza presents an instructive case of an emerging wine destination that has successfully leveraged its natural assets and national branding efforts to establish global relevance. While lacking the centuries-old heritage of its European counterparts, Mendoza has differentiated itself through an appealing combination of high-altitude terroirs, scenic Andean landscapes, and an adventurous, experience-driven tourism model. Its identity as a gateway to the Andes, coupled with robust wine production, especially Malbec, has enabled the region to project a strong and distinctive image in the global wine arena.

According to Rugman and Verbeke's (2005) perspectives on international strategy in emerging markets, Mendoza's ascent has been facilitated by targeted investments in infrastructure, including boutique accommodations, enotourism circuits (such as the "Wine Roads" of Luján de Cuyo and Valle de Uco), and improvements in accessibility (e.g., international flights, bilingual signage). Moreover, collaborations between winemakers, local authorities, and tourism boards have enabled a coherent marketing strategy that blends authenticity, nature, and innovation. These synergies have made Mendoza an attractive destination for millennials and adventurous luxury travelers seeking authenticity over ostentation. In addition, Mendoza's emphasis on sustainability, via organic production, water conservation techniques, and socio-community integration, has aligned with broader consumer shifts toward ethical luxury. This further enhances its differentiation strategy and future-proofs its development model in the context of growing environmental awareness among high-end tourists.

Furthermore, Mendoza has successfully used its natural setting and cultural narratives to offer emotionally charged experiences that balance adventure and authenticity. Getz (1998) and Beames (2003) note that the scenic backdrop of the Andes, combined with Malbec-centered storytelling and opportunities for physical engagement, such as trekking or vineyard cycling, attracts a new generation of luxury travelers seeking personal transformation and escape from urban life.

Australia offers a compelling hybrid between Old World heritage values and New World innovation. Among its wine regions, Margaret River, located in Western Australia, stands out as one of the most developed and strategically positioned enotourism destinations. With over 100 cellar doors open to the public, the region attracted more than 1.6 million overnight visitors and nearly 1 million day-trippers annually prior to the pandemic, making it the third most visited wine region in Australia for international tourists (Margaret River Wine Association, 2023).

Margaret River wineries such as Voyager Estate and Leeuwin Estate exemplify an integrated approach to luxury wine tourism, offering not only high-quality tastings but also award-winning restaurants, cultural events, and architectural innovation. The region's experiential focus has been supported by government initiatives such as the Wine Tourism and Cellar Door Grant Program, which awarded AU$250,000 to bolster its competitiveness in international tourism (MRBTA, 2019).

This holistic model, combining premium wine production, immersive cultural experiences, and sustainability, positions Margaret River as a benchmark for emerging regions aiming to build identity, attract high-value tourists, and develop resilient tourism infrastructure.

Strategic Implications for Emerging Wine Tourism Markets

The comparative study of these five regions reveals distinct yet complementary strategies that can inform the development of competitive roadmaps in less established territories. Tuscany and Piedmont exemplify how to leverage heritage and territorial authenticity; Napa Valley highlights the power of experiential innovation and digital engagement; while Mendoza demonstrates how a clear strategic vision and positioning can rapidly elevate a destination's status.

For emerging regions, the key takeaway lies in adopting a hybrid model that balances local authenticity with global best practices. Strategic investment in storytelling, visitor infrastructure, quality standards, and collaborative governance structures will be essential to gain visibility, enhance visitor satisfaction, and secure long-term economic sustainability. By benchmarking against these leading regions, stakeholders can avoid generic strategies and instead craft tailored offerings that resonate with the expectations of the contemporary luxury wine traveler.

To synthesize the comparative analysis of leading wine regions, Table 3 presents a strategic overview that highlights the distinctive positioning of Tuscany, Piedmont, Napa Valley, Mendoza, and Margaret River across key dimensions such as heritage, innovation, sustainability, and branding style. This table does not reproduce external data but instead summarizes the analytical insights developed throughout section 2.2. It draws on key theoretical frameworks and empirical references, including Pine & Gilmore (1999), Wine Intelligence (2023), and Roberts & Sparks (2006), illustrate how each region has successfully leveraged its unique attributes to appeal to high-end wine tourists. For emerging destinations, this benchmarking offers valuable guidance on how to identify and communicate their own sources of differentiation in an increasingly competitive global market.

Table 1 - Strategic Positioning of Leading Wine Regions

Region	Heritage & Tradition	Innovation	Sustainability	Branding Style	Key Differentiators
Tuscany	Strong DOCG heritage, historic appellations	Moderate	Growing emphasis on organic methods	Classic and romantic	Cultural prestige, wine and food pairing
Piedmont	Deep-rooted Barolo and Barbaresco tradition	Low to moderate	Slow adoption of green tech	Heritage-focused	Terroir-driven wines, small producers
Napa Valley	Modern development (since mid-20th century)	High	Advanced practices and certifications	Lifestyle-oriented, premium innovation	Personalized tastings, luxury hospitality
Mendoza	New World (growing global identity)	Moderate	Emphasis on organic and fair trade	Authentic, adventure-based	Andes scenery, Malbec specialty
Margaret River	Moderate (young wine region)	High	Strong (eco grants, biodynamic practices)	Contemporary eco-luxury	Experiential design, state support, culinary integration

Source: Author's elaboration based on Pine & Gilmore (1999), Wine Intelligence (2023), and Roberts & Sparks (2006).

Strategic Takeaway

This benchmarking exercise underscores that there is no single formula for success in luxury wine tourism. Instead, competitive strength emerges from the alignment between a region's intrinsic characteristics and its ability to craft a compelling, coherent, and differentiated value proposition. Whether rooted in heritage, innovation, or experiential storytelling, the strategic positioning of each region reflects intentional choices that can serve as a roadmap for emerging destinations seeking to build their own identity in the global wine tourism landscape. Instead, competitive strength emerges from the alignment between a region's intrinsic characteristics and its ability to craft a compelling, coherent, and differentiated value proposition. Whether rooted in heritage, innovation, or experiential storytelling, the strategic positioning of each region reflects intentional choices that can serve as a roadmap for emerging destinations seeking to build their own identity in the global wine tourism landscape.

2.3 Target Audience Profiling: High-End Wine Consumers and Niche Travelers

A clear and well-supported understanding of target audiences is fundamental to the strategic development of luxury wine tourism offerings. In a highly segmented and competitive global tourism environment, accurate profiling allows for the creation of value propositions that are aligned with the motivations, expectations, and cultural sensibilities of affluent consumers and niche market segments.

Market Segmentation Theories

According to Kotler and Armstrong (2018), market segmentation is the process of dividing a heterogeneous market into smaller, homogenous groups based on shared characteristics such as demographics, psychographics, behavioral patterns, and geographic location. In the context of luxury wine tourism, this approach facilitates the identification of key audience segments whose preferences and behaviors diverge significantly from those of the mass market.

Demographic indicators, such as age, income, education level, and nationality, provide a foundational understanding of consumer profiles. However, psychographic and behavioral segmentation offers a more sophisticated lens through which to capture the values, aspirations, and consumption logic of high-end travelers. Research indicates that affluent consumers are not merely motivated by the quality of the product but are deeply influenced by symbolic values, lifestyle congruence, and the potential for social distinction (Solomon, 2017).

Luxury wine tourists often seek curated and exclusive experiences that resonate with their identity, worldview, and sense of self-actualization. This segment includes individuals who view travel not only as leisure but as an opportunity for cultural immersion, personal growth, and aesthetic appreciation, dimensions that are especially relevant in the context of wine culture

Roberts and Sparks (2006) highlight that wine tourists, particularly those in higher income and cultural capital segments, are strongly influenced by experiential quality. These visitors value the symbolic aspects of the visit, including how the experience affirms their identity, lifestyle choices, and social status. This suggests that effective segmentation strategies in luxury wine tourism must go beyond demographics and incorporate nuanced psychological motivations, such as the pursuit of learning, self-reward, and emotional resonance.

Psychographics and Lifestyle Typologies

Psychographic segmentation has become particularly important in wine consumer research, giving rise to the development of lifestyle typologies that aid in predicting purchasing and travel behavior. Wine Intelligence (2023) identifies a series of consumer clusters that differ in their motivations, levels of involvement, and consumption rituals. Among high-end consumers, preferences are strongly shaped by emotional connection, narrative authenticity, and brand heritage.

These consumers are typically well-traveled, highly educated, and culturally engaged. They often display a strong preference for authenticity, sustainability, and artisanal production. Moreover, their purchasing decisions are influenced not only by organoleptic qualities but also by the perceived values embedded in the product's origin story, such as family tradition, terroir, and production ethics.

Such consumers fall into lifestyle groups such as "Enthusiastic Explorers", "Cultured Aesthetes," and "Luxury Traditionalists", each with distinct travel motivations, digital engagement habits, and content consumption preferences. Recognizing and targeting these psychographic profiles enables destinations and wineries to design highly tailored experiences and messaging strategies that maximize emotional impact and brand affinity.

Table 2 – Lifestyle Segmentation of Luxury Wine Tourists

Lifestyle Segment	Key Motivations	Digital Behavior	Preferred Experience Elements
Enthusiastic Explorers	Discovery, learning, novelty	High engagement with reviews and social media	Behind-the-scenes tours, wine education, variety
Cultured Aesthetes	Authenticity, aesthetics, cultural immersion	Follows curated blogs and premium travel media	Artful settings, architecture, food & wine pairing
Luxury Traditionalists	Heritage, prestige, exclusivity	Selective use of digital channels	Historical estates, classic tastings, brand legacy

Source*: Author's elaboration based on Wine Intelligence (2023) and Roberts & Sparks (2006).*

Furthermore, experiential variables, such as the presence of knowledgeable staff, personalization of tastings, and quality of the physical setting, are perceived as equally or more important than product quality alone. These dimensions form what Roberts and Sparks refer to as "enhancement factors," which include service interaction, setting aesthetics, and perceived value. Integrating these elements into consumer typologies allows for the design of experiences that more accurately match lifestyle expectations and foster long-term loyalty.

Development of Customer Personas

The operationalization of segmentation data into actionable strategies is often facilitated through the development of detailed customer personas. As noted by Smith (2011), personas are fictional yet data-driven representations of ideal customers, constructed to guide product development, communication, and service design. In luxury wine tourism, these personas typically encapsulate information such as travel behavior, experiential preferences, media touchpoints, lifestyle values, and aesthetic sensitivities.

The following examples Illustrate how such personas can be conceptualized to inform strategic decision-making in experience design, branding, and communication planning. Each profile represents a distinct combination of demographic, psychographic, and behavioral traits aligned with luxury wine tourism motivations.

Isabella, the Cultural Connoisseur is a 45-year-old European art consultant with a deep interest in historical authenticity and intellectual enrichment. She prefers carefully curated wine experiences that integrate storytelling, artisanal production methods, and cultural context, often favoring family-owned wineries with strong regional identity.

David, the New World Explorer, aged 38, is a tech entrepreneur from the United States. He seeks innovation and flexibility in his travel, gravitating toward wineries that blend contemporary design with cutting-edge technology. He values wellness-focused options and interactive elements that provide a sense of novelty and control over his itinerary.

Sofia, the Ethical Epicurean is a 33-year-old sustainability advisor from Brazil. Deeply engaged with environmental and social justice issues, she chooses destinations that demonstrate transparent sourcing, ecological farming, and community-based practices. Her wine tourism priorities include plant-based pairings, environmental workshops, and zero-waste initiatives.

Edward, the Heritage Collector, a 60-year-old British investment banker, embodies the high-end collector profile. He is driven by exclusivity, rarity, and tradition. His travel involves private cellar access, vertical tastings, and opportunities to acquire prestigious vintages. Heritage and prestige are central to his perception of value.

Lena, the Wellness-Oriented Nomad, a 40-year-old yoga instructor and travel influencer from Germany, integrates personal wellness with cultural exploration. She favors biodynamic vineyards, vineyard yoga sessions, and culinary experiences with an emphasis on health and locality. For Lena, balance and sensory harmony are central to luxury.

To illustrate the practical application of customer personas in luxury wine tourism, Table 2 presents a set of representative profiles developed from psychographic and behavioral segmentation principles. These personas synthesize demographic information, core motivations, and experiential preferences commonly observed among high-end wine travelers. By aligning services, messaging, and experience design with the specific expectations of these visitor types, destinations can enhance emotional engagement, improve satisfaction, and foster long-term loyalty.

Table 3 - Sample Customer Personas in Luxury Wine Tourism

Persona Name	Profile Overview	Motivations	Experience Preferences
Isabella, the Cultural Connoisseur	45 y/o European art consultant	Cultural immersion, heritage, artisanal value	Family-run wineries, historical storytelling, educational tastings
David, the New World Explorer	38 y/o American tech entrepreneur	Innovation, wellness, tech-enabled travel	Boutique wineries, AR/VR experiences, modern design
Sofia, the Ethical Epicurean	33 y/o Brazilian sustainability consultant	Sustainability, ethics, environmental impact	Organic vineyards, vegan pairings, eco-workshops
Edward, the Heritage Collector	60 y/o British banker and wine investor	Exclusivity, prestige, collectability	Private tastings, reserve cellars, provenance access
Lena, the Wellness-Oriented Nomad	40 y/o German yoga instructor and influencer	Mindfulness, health, nature connection	Biodynamic wines, vineyard yoga, detox menus

Source: Author's elaboration based on Smith (2011), Wine Intelligence (2023), and Roberts & Sparks (2006).

Personas like these help wineries and tourism boards craft coherent narratives and service offerings, from the design of tasting itineraries and accommodation packages to digital content and loyalty programs. They also enhance operational decision-making by aligning customer service, infrastructure, and branding strategies with the emotional and symbolic drivers of demand.

By incorporating these enhancement factors into persona profiles, destinations can better tailor their value proposition to resonate with specific lifestyle groups. For instance, the "Experience Collector" persona might seek storytelling and interaction with the winemaker, while the “Luxury Escapist” prioritizes comfort, privacy, and exclusive access. These distinctions allow for refined targeting and communication strategies that connect on both emotional and rational levels (Roberts & Sparks, 2006).

Strategic Implications for Destination Development

The strategic profiling of luxury wine travelers is not a static exercise but an ongoing, iterative process that must continuously evolve in response to shifting market conditions and global consumer behavior. In a post-pandemic context, marked by heightened concerns for health, flexibility, and purpose-driven travel, this adaptability has become even more critical (UNWTO, 2020; Wine Intelligence, 2023). The emergence of hybrid motivations that blend indulgence with ethical consciousness has challenged traditional notions of segmentation based solely on demographics or income, reinforcing the need for a more psychographically nuanced understanding of traveler typologies (Solomon, 2017; Roberts & Sparks, 2006).

An evidence-based approach to segmentation and persona development provides a foundation for crafting experiences that are not only coherent and operationally feasible but also emotionally resonant and symbolically meaningful. As Prahalad and Ramaswamy (2004) argue, value in tourism is increasingly co-created through personalized and interactive engagements, which require a deep alignment between consumer expectations and destination offerings.

Moreover, the use of detailed personas supports internal consistency across branding, service design, and communication strategies. It allows destinations and wineries to tailor both their messaging and their operational delivery to specific psychological drivers such as authenticity-seeking, status signaling, or self-actualization. This alignment contributes to stronger emotional bonds, higher rates of return visitation, and increased customer lifetime value (Kotler & Keller, 2016; Smith, 2011). Ultimately, destinations that invest in dynamic, research-informed audience profiling are better positioned to differentiate themselves in an increasingly saturated global market.

Strategic Takeaway

Profiling high-end wine consumers through psychographic segmentation and persona development is not only a marketing tool but a strategic imperative. It allows destinations to move beyond generalizations and build experiences that connect with real motivations, identities, and expectations. A nuanced understanding of these audiences lays the groundwork for more precise and emotionally impactful experience design.

2.4 Experience Design and Value Proposition Differentiation

In the realm of luxury tourism, the ability to deliver high-value, memorable experiences has evolved from being a competitive advantage to a fundamental expectation. This shift reflects broader changes in consumer behavior, whereby affluent travelers no longer seek only premium services, but emotionally engaging and personally meaningful interactions with places, products, and people (Pine & Gilmore, 1999; Schmitt, 1999). Wine tourism, in particular, has embraced the principles of experience design to craft offerings that go beyond traditional, transactional encounters, such as standard tastings or guided tours, and instead cultivate immersive, narrative-driven propositions that resonate with individual values and aspirations.

These concepts will be further explored in this section through the lens of co-creation, multisensory engagement, and authenticity, highlighting how experiential design contributes to emotional attachment, brand differentiation, and long-term loyalty in the luxury wine tourism context.

Roberts and Sparks (2006) identified eight key “experience enhancement factors” that significantly shape tourist satisfaction in wine regions: authenticity, value for money, interaction with staff, physical setting, product quality, informational content, opportunities for personal development, and indulgence. These elements offer a comprehensive framework for designing high-value experiences in the luxury wine context, especially when combined in a coherent and emotionally engaging way.

Pine and Gilmore's (1999) seminal work introduced the concept of the "Experience Economy", advocating for a shift from merely providing goods and services to staging immersive experiences that engage customers on multiple sensory and emotional levels. In the context of wine tourism, this involves integrating sensory, emotional, and cultural elements to create a holistic and meaningful encounter with both place and product.

Experiences are inherently personal and exist only in the minds of individuals interacting with the staged event. Therefore, they are always co-created (Pine & Gilmore, 1999). This perspective emphasizes that customers play an essential role in constructing their experiences, leading to unique value creation.

The concept of co-creation has gained prominence in tourism and hospitality, highlighting the collaborative process between organizations and stakeholders that generates mutual benefits and value (Ind et al., 2013). In wine tourism, co-creation manifests through personalized experiences such as interactive wine blending sessions, guided vineyard tours, and participatory events that allow guests to engage actively with the winemaking process.

Prahalad and Ramaswamy (2004) argue that co-creative processes lead to deeper brand connections and sustainable competitive advantages. By involving guests in the creation of their own experiences, destinations can foster emotional attachment, customer loyalty, and long-term engagement.

The success of co-created experiences lies in their ability to foster a sense of participation and co-ownership. Visitors become active agents rather than passive consumers, and the personalization of their journey enhances the memory value of the experience. As Prahalad and Ramaswamy (2004) explain, value is not delivered by the firm alone but is co-constructed through meaningful interactions. In the luxury segment, this is particularly relevant: bespoke tastings, private events, and even opportunities to blend one's own wine represent high-perceived-value moments that differentiate the destination.

Uniqueness in Experience Staging

Differentiation in luxury wine tourism is achieved by integrating unique cultural and historical elements into the visitor experience. This includes exclusive tasting sessions, behind-the-scenes tours, and storytelling about the wine production process, which significantly enhance the experiential value and set high-end destinations apart from their competition (Schmitt, 1999).

Schmitt's (1999) experiential marketing framework outlines five strategic experiential modules: sensory experiences (Sense), affective experiences (Feel), creative cognitive experiences (Think), physical experiences and behaviors (Act), and social-identity experiences (Relate). By leveraging these modules, wine tourism destinations can create comprehensive and engaging experiences that resonate with visitors on multiple levels.

Additionally, the success of wine tourism experiences results from the combination of three core components: the core wine product, the destination's appeal, and the cultural product (Correia & Brito, 2019). Tangible components include producers, wine cellars, restaurants, and landscapes, while intangible components encompass traditions, authenticity, atmosphere, culture, and interactions. The interplay between these elements creates a rich and immersive experience that appeals to luxury travelers seeking authenticity and exclusivity.

In this sense, architectural and design innovations are both interesting points to keep in mind. Innovative architectural designs have transformed wineries into destinations that offer more than just wine tasting. For instance, Australia's d'Arenberg Cube, inspired by a Rubik's Cube, combines wine tasting with culinary delights and art installations, enhancing the overall visitor experience (Vogue, 2017). Such high-design wineries exemplify how architectural innovation can elevate the wine tourism experience, making it more memorable and distinctive.

In conclusion, by strategically designing experiences that are unique, customizable, and immersive, luxury wine tourism destinations can exceed the expectations of discerning clientele. This approach not only enhances the perceived value of the offering but also aligns with broader trends in consumer behavior, where the pursuit of meaning, connection, and uniqueness drives purchasing decisions.

Strategic Takeaway

Luxury wine tourism thrives on its ability to offer immersive, emotionally engaging, and co-created experiences. Designing such value propositions requires an intentional blend of sensory stimulation, storytelling, and personalization. Ultimately, destinations that master the art of crafting meaningful encounters stand out in a crowded market and foster lasting emotional bonds with their visitors.

2.5 Regulatory and Logistical Considerations for International Wine Shipping

Expanding into international wine markets is a strategic endeavor that hinges on mastering two interrelated pillars: regulatory compliance and logistical execution. These dimensions are not mere operational concerns, they are the foundation upon which the success, resilience, and credibility of a wine export venture are built. For producers aiming to extend their presence beyond national borders, understanding and proactively managing these challenges is essential.

At the regulatory level, one must first consider the intricacy and diversity of legal frameworks that govern the trade of alcoholic beverages across jurisdictions. Take the European Union (EU) as a case in point: it maintains a robust and multifaceted system of wine regulation, encompassing labeling standards, enological practices, and, crucially, the protection of geographical indications (Gis). These Gis, such as Champagne, Rioja, or Barolo, serve not only to safeguard regional identities but also to ensure product authenticity and uphold quality expectations. Regulation

(EU) 2024/1143 codifies the protections afforded to these designations, streamlining their application across member states while reinforcing control measures to prevent misuse (UNEP, 2024).

Wine producers eyeing the EU market must thus engage with these rules not as bureaucratic hurdles, but as critical components of brand positioning and consumer trust. Failing to comply can lead not only to blocked shipments and legal penalties but also to long-term reputational setbacks. Beyond the EU, major markets such as the United States, China, and Canada each have distinct and often stringent import requirements, encompassing customs declarations, additive disclosures, excise duties, and language-specific labeling mandates. Therefore, a one-size-fits-all approach is insufficient. Producers must develop flexible regulatory strategies that adapt to varying legal expectations while maintaining product integrity and brand coherence.

In parallel, logistical execution stands as the other cornerstone of successful international wine trade. Wine, being a living product, is especially vulnerable to environmental stressors, particularly temperature variations, humidity shifts, and vibration during transit. Consequently, preserving wine quality during cross-border shipping requires a sophisticated cold chain infrastructure. This includes the use of climate-controlled storage, insulated packaging, temperature-monitored containers, and contingency planning for delays or route deviations. According to Coyle et al.

(2016), these logistical solutions are no longer optional luxuries but operational necessities in the context of premium wine distribution.

Moreover, the sophistication of the logistics system has direct implications for cost efficiency and market competitiveness. Inadequate coordination between supply chain actors, such as producers, logistics providers, customs agents, and distributors, can lead to inventory gluts, delivery failures, or compliance oversights. As Christopher (2016) emphasizes, the adoption of digital technologies, including blockchain, IoT sensors, and real-time inventory tracking, enhances transparency, mitigates risk, and enables agile responses to unforeseen challenges.

The customs dimension is equally critical. Accurate product classification under the Harmonized System (HS) codes is vital for determining applicable tariffs and ensuring smooth clearance procedures. Misclassification can result in penalties, delays, or even the seizure of goods. Leveraging tools such as Single Window Systems (SWS), increasingly adopted in countries like Singapore, New Zealand, and EU member states, enables the streamlined submission of required documentation, including certificates of origin, invoices, and other compliance materials, through centralized digital platforms (UNECE, 2023). This not only simplifies administrative processes but also reduces the likelihood of procedural errors.

Adding to these functional concerns is a broader strategic opportunity. Producers who align their operations with sustainability and transparency trends stand to benefit from shifting consumer preferences. For instance, minimizing the carbon footprint of shipping routes, utilizing recyclable or biodegradable packaging materials, and offering traceability features via QR codes can resonate deeply with environmentally conscious consumers. In a crowded market, such initiatives can be decisive in differentiating a brand.

Ultimately, managing the dual challenges of regulatory complexity and logistical precision is not a reactive task but a proactive strategy. Successful wine exporters recognize that market access depends as much on administrative readiness and operational excellence as it does on the intrinsic quality of their product. By embedding these considerations into their internationalization blueprint, producers can build scalable, adaptable, and trustworthy supply chains that enhance their competitiveness on the global stage.

For Personas like Sofia (the Ethical Epicurean), logistics are not merely operational concerns but value signals. Carbon-neutral shipping, transparent sourcing, and ethical certification directly influence perceptions of authenticity and brand integrity. As such, regulatory and logistical strategies must align with the psychographic expectations of conscious luxury consumers.

Strategic Takeaway

As wine tourism becomes increasingly global and commercially relevant, logistical and regulatory preparedness becomes central to long-term success. Producers and destinations that understand and optimize these dimensions not only ensure compliance and product quality but also enhance brand trust and international competitiveness. Strategic logistics is, therefore, as much a part of the experience as the wine itself.

CHAPTER 3: Strategic Opportunity in Marche

The Marche region stands at a pivotal intersection of tradition and innovation. While often overshadowed by more renowned Italian destinations, its discreet charm, authentic landscapes, and rich enogastronomic heritage make it a promising candidate for strategic development in wine tourism. This chapter explores the unique territorial identity of Marche, analyses the current state of its wine tourism offer, and identifies untapped assets and structural gaps. By contextualizing the region within global travel trends and regional development strategies, this chapter frames Marche not as a peripheral player, but as an emergent protagonist in the future of sustainable and experiential tourism.

Marche region stands out as a unique and underappreciated region in Italy, offering a captivating fusion of geography, viticulture, and cultural heritage. Unlike the internationally famous wine regions like Tuscany or Piedmont, Marche is a land of remarkable diversity, where coastal landscapes merge with rugged mountains, and ancient winemaking traditions coexist with contemporary, sustainable practices. This section explores the region's geographical richness, its indigenous wine varieties, the artisanal nature of its winemaking, and the compelling stories that make it an emerging destination for experiential wine tourism.

3.1 Unique characteristics of the region: territory, wine, people, and story

Marche's slender geography, compressed between the Apennine mountains and the Adriatic Sea, creates dramatic ecological contrasts. Within a span of tens of kilometers, the landscape shifts from alpine peaks to coastal plains, fostering a mosaic of microclimates and terroirs. For instance, the Verdicchio grapes of Castelli di Jesi thrive on limestone-dolomite foothills near the coast, yielding crisp, citrus-driven wines, while the inland Matelica subzone, with its higher-altitude vineyards on basalt and clay soils, produces richer, floral expressions of the same varietal (Barlow, 2017). This "45-minute duality", a term coined to describe the rapid transition from mountain to sea, underscores the region's enological versatility, as illustrated in Figure 1.

Figure 1 - 45-minute duality

Source: Own elaboration with the assistance of AI tools.

Protected areas like Parco del Conero and Frasassi e Gola della Rossa Regional Park further amplify this diversity. The Conero promontory, with its rugged coastal cliffs and Mediterranean maquis, hosts initiatives such as the "Rosso Conero Road," a trail connecting wineries specializing in the robust Montepulciano-based reds of the area (Salizzoni, 2012). Meanwhile, the Frasassi caves and karst gorges in the

Apennines attract eco-tourists, blending geological wonder with viticultural heritage. These parks not only preserve biodiversity but also serve as catalysts for sustainable tourism, integrating agriculture, ecology, and cultural storytelling.

Marche’s wine portfolio is anchored by its protected designations (DOC and DOCG), which reflect both quality and territorial specificity. Verdicchio, the region’s flagship white, boasts two distinct DOCGs: Verdicchio dei Castelli di Jesi Riserva and Verdicchio di Matelica Riserva, elevated to DOCG status in 2010–2011. The coastal Jesi subzone, with its limestone-clay soils, yields mineral-driven, age-worthy whites, while Matelica’s cooler, higher-altitude vineyards produce structured, aromatic expressions (Wine Enthusiast, n.d.).

Among reds, Rosso Conero DOC (1967) and its Conero Riserva DOCG (2004) stand out for their Montepulciano-dominant blends, characterized by coastal freshness and depth. Further south, Rosso Piceno DOC (1968) combines Montepulciano and Sangiovese, offering a lighter, food-friendly profile. The region also hosts the Vernaccia Nera di Serrapetrona DOCG, a hidden Italy’s red sparkling wine, and Lacrima di Morro d’Alba DOC, an aromatic red celebrated at annual festivals (IMT DOC, n.d.).

Recent export data underscore Marche’s growing global appeal: PDO wine exports surged by 33% (reaching €76 million) between 2018–2023, driven by Verdicchio and Rosso Conero (Wine News, 2023). This success stems from concerted efforts by regional consortia to promote quality and authenticity, positioning Marche as a benchmark for terroir-driven Italian wines.

Marche’s viticultural landscape is articulated through distinct subzones, each combining specific topographical, climatic, and geological features that shape the region’s diverse wine styles.

- The Jesi Hills (200–400m) are characterized by clay-limestone (marl) soils and a moderately continental inland climate. This area is home to Verdicchio dei Castelli di Jesi DOC, producing high-acidity, mineral, and age-worthy white wines, with white wine (Verdicchio) as the main production type.
- Inland, Matelica (300–700m) lies in a mountain valley with strong diurnal temperature variations and calcareous clay soils. Here, Verdicchio di Matelica DOC wines are known for their structured and aromatic expressions of Verdicchio, often complemented by Sangiovese. Both white and red wines are produced.
- The Serrapetrona zone (400–600m) features marl-limestone soils and a mix of continental and mountain climates. It is the origin of Serrapetrona DOCG, a unique designation for sparkling red wines made from Vernaccia Nera, rooted in traditional methods.
- Morro d’Alba (150–250m), with clay-rich fertile soils and coastal breezes, is known for the Lacrima di Morro d’Alba DOC, producing

aromatic red wines with floral notes. The main production is red, from the native Lacrima grape.

- The Conero slopes (50–200m), influenced by the Mediterranean, are defined by calcareous and sandy soils. The area is known for Rosso Conero DOC and Conero Riserva DOCG, producing robust, full-bodied red wines based on Montepulciano.
- Macerata Hills (300–700m) enjoy a moderately cool inland climate and calcareous clay soils. The area is home to Colli Maceratesi DOC, with emerging white and aromatic red wines made from Sangiovese and Maceratino.
- Southern Ascoli area around Offida (250–450m) features clay and sandy soils under warm Adriatic influence. It hosts Offida DOCG and Rosso Piceno Superiore DOC, producing fresh whites from Pecorino and Passerina, and structured reds from Montepulciano.

This territorial diversity allows Marche to offer a complex and distinctive wine portfolio, deeply anchored in micro-regional identity and historical continuity.

Marche’s wine sector is largely composed of small-scale producers: nearly 70% of wineries produce fewer than 100,000 bottles per year, with the most common production range falling between 60,000 and 80,000 bottles. This insight is based on the 108 wineries from the region featured in the Slow Wine 2025 guide.

These contadino-imprenditori, farmer-entrepreneurs, integrate viticulture with agritourism, offering guests immersive experiences such as cellar tours, harvest participation, and meals prepared with farm-to-table ingredients. As Grechi et al. (2024) note, this model transforms hospitality into a “living narrative,” where generational knowledge and passion are shared firsthand.

The region’s alignment with slow tourism principles is evident in its Cittaslow-certified villages and initiatives like “Marche Food and Wine Memories,” which archives oral histories of rural life (Shakya & Vagnarelli, 2024). Visitors frequently describe Marche as “unspoiled” and “genuine,” a testament to its resistance to mass tourism in favor of intimate, community-driven experiences (The Italian on Tour, n.d.).

Marche’s towns are living museums of Italian history. Jesi, birthplace of Emperor Frederick II, enchants with its medieval walls and Renaissance palaces, while Urbino, a UNESCO World Heritage Site, showcases Renaissance grandeur through the Ducal Palace and the legacy of Duke Federico da Montefeltro. The port city of Ancona, founded in the 5th century BCE, bridges ancient and modern, with Roman arches overlooking Adriatic trade routes. In the south, Ascoli Piceno’s travertine-clad piazzas and Macerata’s Sferisterio opera arena highlight the region’s artistic and architectural legacy (Italia.it, n.d.).

These historical layers enrich wine tourism by embedding enological experiences within broader cultural narratives. For example, Jesi’s regional enoteca pairs Verdicchio tastings with tours of its Roman foundations, while Urbino’s art-focused visitors often explore nearby vineyards, blending aesthetic and gustatory pleasures.

Strategic Takeaway

Marche's geographical and cultural complexity, often cited as a weakness in terms of visibility, can be reinterpreted as a competitive advantage in the context of experiential tourism. The region's layered identity, from its coastal-hill transitions to its wine typologies and historical roots, aligns with global trends favoring authenticity, human connection, and "undiscovered" destinations. For a project aimed at attracting international wine travelers, this depth of meaning and diversity of setting offers fertile ground for immersive storytelling and distinctive positioning.

Building on this strategic framework, the following section provides a data-grounded overview of the region's productive structure.

3.2 Structure and Performance of the Wine Sector

While Section 3.1 mapped the territorial and cultural pillars of Marche's wine identity, this section analyzes the operational and strategic readiness of its wineries to engage with tourism markets.

Italy's Wine Production Landscape

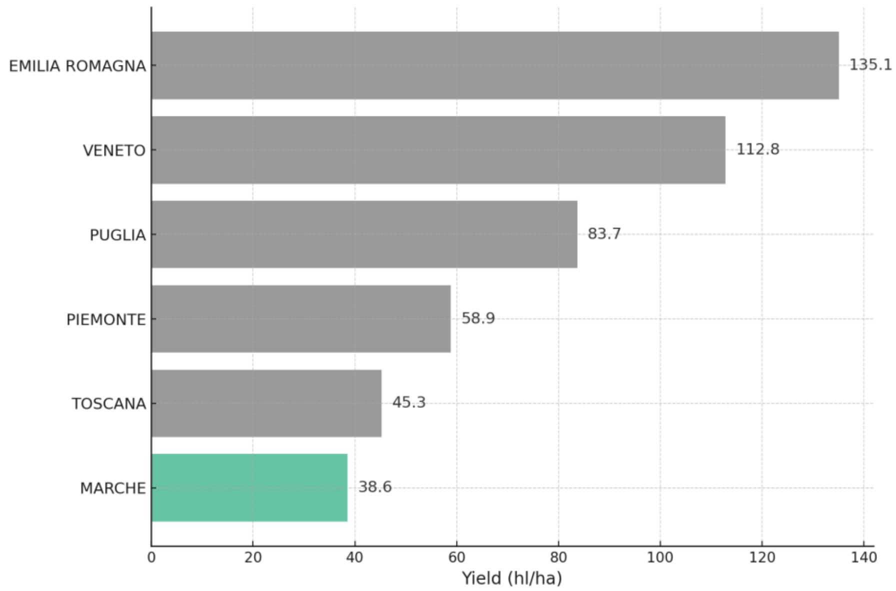
While Chapter 2 positioned Marche within the broader international and strategic landscape of wine tourism, this section begins a more technical analysis by situating the region within the structural framework of Italian wine production. Italy remains the world's leading wine producer by volume, supported by a complex and diversified viticultural landscape that ranges from highly industrialized areas to small-scale artisanal territories. Understanding the quantitative positioning of Marche, particularly in terms of cultivated area, output, and production intensity, is essential to contextualize its enotourism and export potential.

As of 2024, Italy cultivates approximately 673,000 hectares of vineyards. The largest regional contributors in terms of surface area are Sicilia (95,000 ha), Puglia (90,882 ha), and Veneto (103,504 ha), all of which support high-volume production systems with robust export pipelines. In contrast, Marche ranks 11th, with a total vineyard surface of approximately 18,000 hectares, reflecting a structurally smaller profile more consistent with artisanal practices.

Production figures further highlight this disparity. In 2024, national wine production recovered to 47.6 million hectoliters, following a historically low output in 2023 due to adverse climatic conditions. Regions like Veneto (11.7 M hl) and Emilia-Romagna (7.1 M hl) dominate the rankings. By comparison, Marche produced 857,000 hectoliters, placing it in the middle-to-lower tier among Italy’s wine regions.

A more insightful indicator emerges when considering yield per hectare, a proxy for production intensity. In 2024, Veneto and Emilia-Romagna recorded the highest yields, with 113 and 135 hectoliters per hectare, respectively. These figures confirm their orientation toward high-efficiency production systems. In contrast, Marche shows a significantly lower yield of approximately 48 hl/ha, consistent with limited mechanization, lower-density plantings, and a focus on quality rather than volume. A closer look at yield per hectare, an indicator of production intensity, reinforces this structural distinction. While regions like Emilia-Romagna and Veneto consistently achieve yields above 110 hl/ha, Marche remains far below this threshold, averaging approximately 48 hl/ha in 2024. This low productivity is not a weakness but rather a reflection of the region's qualitative orientation. Limited mechanization, lower vine density, and artisanal cultivation methods all contribute to a production model that prioritizes identity and typicity over volume. The following chart visualizes these yield differentials among selected regions.

Figure 2 - Wine Yield per Hectare by Region (2024)



Source: Osservatorio del Vino, 2024.

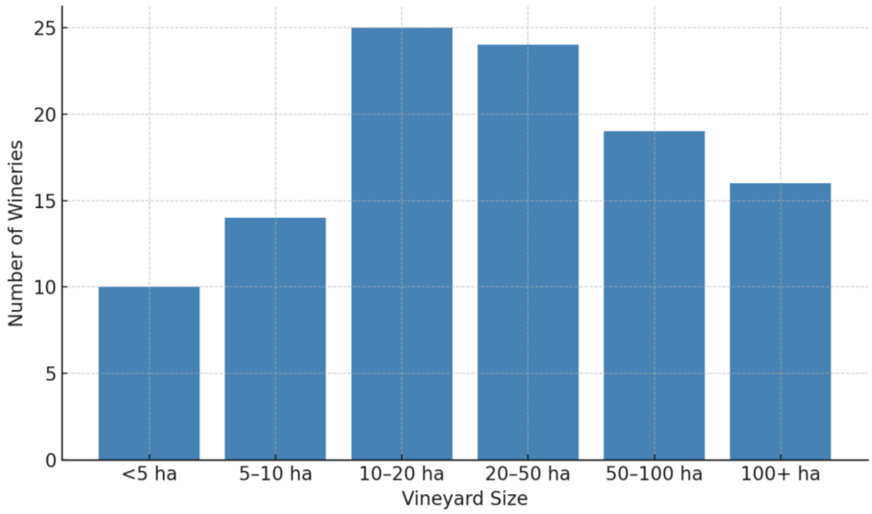
This structural configuration explains why Marche is not positioned to compete with large-scale producers like Veneto or Puglia. Instead, its characteristics align more closely with regions like Piemonte or Toscana, where quality, typicity, and territorial identity are prioritized over scale. The relatively low production per hectare, combined with stable surface area and a high proportion of DOC/DOCG wines, reinforces the narrative of a region geared toward value-driven and experience-oriented markets.

3.2.1 Profile of Regional Wine Producers

The wine producers of Marche represent a sector deeply rooted in artisanal values, shaped by family traditions, modest production scales, and a close relationship with the land. Drawing on a comprehensive dataset of 108 wineries listed in the *Slow Wine 2025* guide, this section offers a technical profile of the region's production structure. Unlike the previous section (3.1), which focused on territorial characteristics, grape typologies, and human capital, the analysis here centers on measurable parameters such as vineyard surface area and production volume, key indicators of a winery's operational configuration and its readiness to engage in wine tourism.

The average vineyard size among the surveyed wineries is 9.7 hectares; however, this figure masks a more meaningful distribution pattern. Over 45% of wineries manage less than 20 hectares. Specifically, 10 producers cultivate fewer than five hectares, while another 14 operate between five and ten hectares. These micro-scale operations reflect a dominant artisanal identity, where production remains largely manual, deeply shaped by family traditions, and aligned with environmentally sustainable practices. At the opposite end of the spectrum, only 16 wineries operate over 100 hectares, approximately 15% of the sample, indicating that industrial-scale viticulture remains a marginal model in the region.

Figure 3 - Distribution of Wineries by Vineyard Size

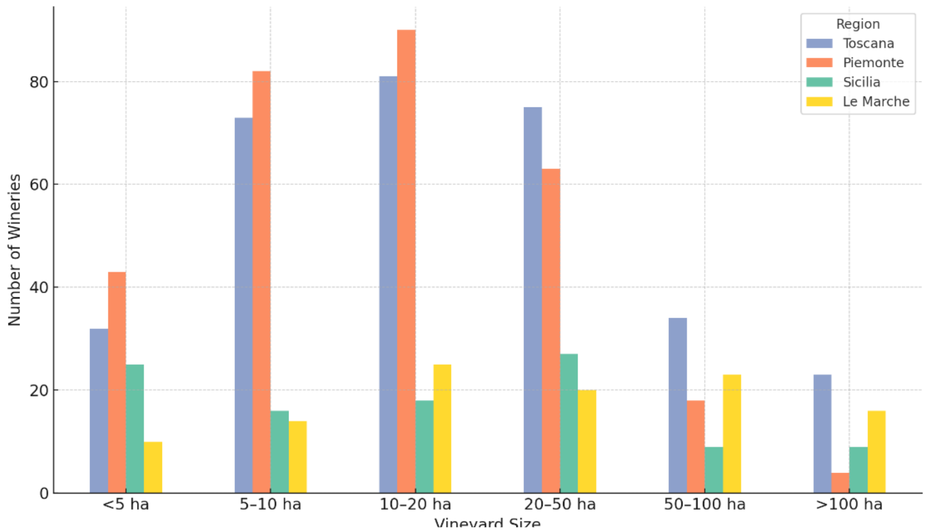


Source: Based on data from 108 wineries listed in the Slow Wine 2025 guide.

This chart illustrates the predominance of small and medium scale producers in Marche. Over 45% of wineries manage less than 20 hectares, reinforcing the region's artisanal production identity.

To contextualize this distribution and better position Marche within the national landscape, a comparative analysis was conducted using the same vineyard-size classification for three key Italian regions: **Toscana**, **Piemonte**, and **Sicilia**. The selection of these regions responds to complementary reasons. Toscana and Piemonte represent internationally established models of symbolic capital and structured enotourism, often cited in academic literature and promotional frameworks alike. Sicilia, by contrast, presents a more comparable reference in terms of number of wineries and award performance in *Slow Wine 2025*, making it a relevant peer for structural benchmarking.

Figure 4 - Comparative Distribution of Wineries by Vineyard Size



Source: Own elaboration based on data from Slow Wine 2025.

The results reveal that **Marche and Piemonte share a similarly artisanal profile**, with a high concentration of wineries under 20 hectares. This reinforces the perception of both regions as grounded in family-based, quality-oriented viticulture. **Toscana**, while also rich in small and mid-sized producers, displays a more evenly spread distribution across all vineyard sizes. This structural flexibility underpins its dual ability to support both high-volume exports and premium tourism experiences. **Sicilia**, by contrast, shows a more polarized structure, combining a significant number of very small producers with a substantial presence of large-scale wineries, indicative of its hybrid model between tradition and industrial wine production.

In this comparison, **Marche stands out for its coherence and balance**: it preserves a strong artisanal core while maintaining a relevant share of mid-sized and even large producers. This structural diversity may prove strategically valuable: it allows the region to offer intimate, high-quality experiences, while still accommodating scalable initiatives such as international shipping, culinary tourism integration, or small-group itineraries. These findings strengthen the hypothesis that Marche, despite its lower visibility, holds a configuration particularly suited to the development of exclusive, human-centered enotourism aligned with global experiential trends.

Similar characteristics are observed in Argentina's Valle de Uco, where producers combine small-scale operations with high-quality viticulture and hospitality-based differentiation. As Álvarez (2022) explains, this "artisanal premiumization" allows wineries to offer emotionally resonant experiences while positioning themselves in competitive export markets. The synergy between terroir expression, enotourism, and commercial strategy suggests that regions like Marche can follow a path that blends experiential depth with gradual internationalization, without replicating the industrial logic of larger wine economies.

This small-to-medium scale profile is further supported by production volume data. The average annual output is approximately 23,800 bottles per winery, with nearly half of all producers remaining below the 50,000-bottle mark. Twenty-five wineries produce between 20,000 and 50,000 bottles annually, while another 24 falls in the 50,000 to 100,000 range. These figures suggest a production model oriented more towards quality and exclusivity than toward large-scale commercial exports. As noted by Getz and Brown (2006), such scale is particularly well-suited to premium positioning strategies, direct-to-consumer engagement, and curated storytelling, factors that are essential for attracting wine tourists in search of authentic, human-centered experiences.

While this structural configuration offers clear advantages for the development of immersive, boutique tourism offers, it also presents notable limitations. Smaller wineries often lack the physical infrastructure, personnel, or language skills necessary to host visitor groups or deliver consistent enotourism programming. The same characteristics that make these producers appealing to niche markets, intimacy, uniqueness, tradition, may also hinder scalability and their ability to meet the logistical demands of organized tourism circuits. As Hall and Sharples (2008) argue, the transition from wine production to tourism service provision is not automatic; it requires training, investment, and a shift in business orientation.

While these aggregated figures provide a solid structural overview, they do not capture the strategic intentions or experiential readiness of producers. To address this gap, the author conducted a focused survey in early 2025, designed to complement secondary data with firsthand insights into producers' perspectives on enotourism, experiential services, and internationalization strategies.

A structured questionnaire was distributed to a targeted sample of 10 wineries selected from the broader *Slow Wine 2025* dataset. The selection criteria were designed to ensure a representative cross-section of the region, considering geographical distribution, soil types, and wine styles. All selected wineries had also received national awards or similar recognition, signaling the artisanal quality of their production. Importantly, they operated at a scale consistent with the project's focus, with an average annual production of approximately 50,000 liters.

The survey combined closed and open-ended questions, exploring four thematic areas: reception of international visitors, types of experiences offered, perceived limitations to enotourism development, and export practices. Responses were collected via email and online forms, and in some cases supplemented by follow-up conversations. While the sample is not statistically representative, it provides valuable qualitative insights that enrich the quantitative findings presented earlier in this section. Throughout this chapter, the term "survey" refers specifically to this data collection effort.

Ultimately, the region's wine producers are structurally positioned to support a distinctive form of wine tourism, one that emphasizes slow rhythms, one-on-one encounters, and a deep sense of place. Their operational scale aligns well with broader trends in experiential travel, particularly among international visitors who prioritize authenticity over spectacle (Carlsen & Charters, 2006). The challenge, therefore, lies not in altering the structural DNA of these enterprises, but in creating a supportive ecosystem that enables them to convert symbolic capital into sustainable tourism practices.

3.2.2 Recognition and Quality: Slow Wine Awards

The present analysis relies on data published in the *Slow Wine* guide, an annual publication by Slow Food Italy that evaluates Italian wineries according to qualitative, ethical, and environmental criteria. This source was selected for three primary reasons:

1. Alignment with the research values: *Slow Wine* rewards not only technical quality but also environmental sustainability, ethical practices, and strong ties to territorial identity. These dimensions are central to the vision of enotourism promoted in this study.
2. Transparency and consistency: The guide offers clearly defined categories (*Chiocciole*, *Bottiglie*, *Monete*), applied consistently across all regions and years. This allows for credible year-on-year comparisons and cross-regional benchmarking.
3. Comprehensive national coverage: All 20 Italian regions are included

annually, with awards assigned based on direct tastings and visits. This provides a reliable foundation to assess both regional excellence and structural dynamics within the national wine sector.

The 2025 edition of *Slow Wine* confirms the continued leadership of Piemonte and Toscana, which together concentrate a large share of total awards across all categories. To contextualize the performance of other regions, a classification model was developed using the absolute number of awards, focusing specifically on *Chiocciole* (for sustainability and identity) and *Bottiglie* (for technical excellence), the two most relevant categories for the objectives of this study.

Based on the combined number of these awards, regions were grouped into four tiers:

- **Leader**: Piemonte, Toscana, Alto Adige, Veneto
- **Consolidated**: Marche, Emilia-Romagna, Campania, Sicilia
- **Intermediate**: Abruzzo, Umbria, Puglia, Friuli-Venezia Giulia, Lombardia
- **Emerging**: Sardegna, Basilicata, Calabria, Molise, Liguria, Valle d'Aosta, Lazio

Under this framework, **Marche falls into the Consolidated group**. With 13 *Chiocciole* and 13 *Bottiglie*, it displays a solid and balanced profile. Though not among the top five regions in absolute numbers, its performance is especially strong when adjusted for size and past visibility. The region shows coherence between sustainability and technical recognition, reinforcing its alignment with the values promoted by *Slow Wine*.

The following figure presents the evolution of *Chiocciole* and *Bottiglie* awards between 2023 and 2025 for five strategically relevant regions: Sardegna, Marche, Sicilia, Piemonte, and Toscana.

It is important to note that within the **Consolidated** category, *Marche* was the region with the highest relative growth in *Chiocciole*, the award most aligned with the objectives of this project. This reinforces its position as the most dynamic territory in its group with regard to sustainability and territorial identity.

To better understand the directionality of regional positioning, the awards from 2023 and 2025 were compared in absolute terms, focusing on the two most relevant categories: *Chiocciole* and *Bottiglie*. The analysis revealed three clear cases of standout growth:

In *Chiocciole*:

1. **Sardegna** grew by +400% (from 1 to 5 awards).
2. **Marche** grew by +44.4% (from 9 to 13).
3. **Sicilia** grew by +23.1% (from 13 to 16).

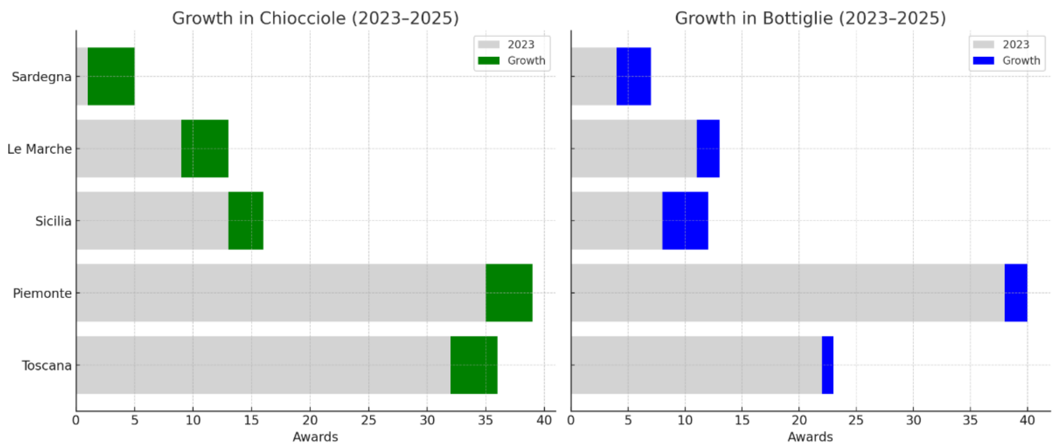
In *Bottiglie*:

1. **Sardegna** grew by +75.0% (from 4 to 7).
2. **Sicilia** grew by +50.0% (from 8 to 12).
3. **Marche** grew by +18.2% (from 11 to 13).

These figures highlight the significant upward trajectory of **Marche**, both in relative and absolute terms. While it remains classified as **Consolidated**, its growth is stronger than many **Leader** regions, which shows either stagnation or only marginal improvements. This includes Piemonte (+11.4% in *Chiocciole*) and Toscana (+12.5%), both of which increased from higher baselines but at a slower rate.

In summary, **Marche's dual growth in sustainability and quality marks a strategic opportunity**. If sustained, this trajectory could position the region within the Leader group in coming editions of the guide. The current momentum, especially when contrasted with the plateauing of some historically dominant regions, reinforces Marche's potential to gain visibility and competitiveness in the evolving landscape of Italian wine.

Figure 5 - Growth in Chiocciole and Bottiglie Awards (2023–2025)



Source: Own elaboration based on Slow Wine 2023 and 2025

This double horizontal bar chart illustrates both the baseline number of awards in 2023 and the subsequent growth in 2025. The visual clearly highlights Sardegna's explosive relative growth, especially in *Chiocciole*, albeit from a very low starting point. Marche stands out as the region with the most balanced and significant growth within the Consolidated group, increasing in both categories and overtaking or matching higher-ranked regions in terms of momentum. Sicilia shows a parallel trajectory, particularly in *Bottiglie*, while Piemonte and Toscana, although still leaders, demonstrate more modest growth. This contrast underscores the shifting dynamics and growing competitiveness of regions like Marche within the national wine landscape.

This analysis has shown that *Slow Wine* awards offer not only a snapshot of current regional performance, but also a valuable lens for identifying emerging trends and strategic trajectories. Marche's strong and balanced growth in both *Chiocciole* and *Bottiglie*, particularly its leadership in relative gains within its category, positions it as one of the most dynamic and promising regions in Italy's wine sector. As traditional leaders like Piemonte and Toscana show signs of stabilization, regions like Marche, grounded in sustainability and technical excellence, are gaining ground. This evolution suggests that Marche holds not only present relevance but also future potential to redefine the geography of premium, identity-driven Italian wine.

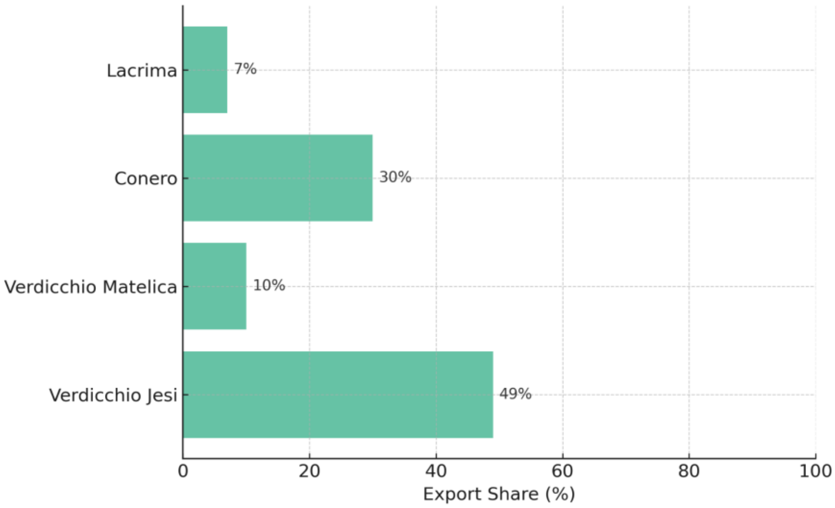
3.2.3 Export Capacity and Commercial Orientation

Italy remains one of the world's top wine exporters, with international sales totaling nearly **€6 billion** in the first nine months of 2024, marking a **+5.6% increase in value** and **+3.2% in volume** compared to the same period in 2023 (*Osservatorio del Vino*, 2024). This rebound follows a difficult 2023, when exports contracted by **-4.2% in value** and **-1.3% in volume**, largely due to global inflation, logistical challenges, and a historically low harvest of **38 million hectoliters**. Bulk wines led the recovery in 2024 (+14% in price), while still bottled wines grew marginally (+0.8%), and sparkling wines declined slightly. These national trends offer critical context for evaluating Marche's international engagement, particularly given its artisanal scale and focus on bottled wines.

Within this broader landscape, Marche shows a modest yet structured export profile. According to the *Istituto Marchigiano di Tutela* (IMT, 2025), **approximately 39% of total production under IMT supervision is exported**. This export share, however, varies significantly by appellation. **Verdicchio dei Castelli di Jesi** exports nearly **49%** of its 7.1 million bottles, while **Conero** exports **30%** of 677,000 bottles. In contrast, **Verdicchio di Matelica** and **Lacrima di Morro d'Alba** are still predominantly consumed domestically, with only **10% and 7%** of their respective production (2.2 million and 1.2 million bottles) reaching international markets. These disparities reflect differences in market maturity, promotional investment, and logistical integration.

Based on data from the *Istituto Marchigiano di Tutela*, this chart shows the share of total production exported for each major appellation. The data highlight how international orientation varies widely across denominations.

Figure 6 - Export Share by Denomination in Marche (2025)



Source: IMT Osservatorio Vinitaly 2025.

Main destinations for Marche wines include **Germany, the Netherlands, the United States, Japan**, and the **United Kingdom**, indicating a geographically diversified presence across both European and non-European markets. Regarding distribution channels, **54.6% of wines are sold via mass retail (GDO)**, **31.9% through Ho.Re.Ca.**, and **9.1% via direct sales**, suggesting that while the region operates on a small scale, its producers are strategically embedded in a variety of commercial platforms.

To complement these quantitative insights, a targeted survey was conducted among selected producers featured in the *Slow Wine 2025* guide. Selection criteria included geographical diversity (Jesi, Conero, Piceno), an annual production between 40,000 and 80,000 liters, and demonstrated openness to internationalization and wine tourism.

Survey results show that nearly all participants are engaged in foreign markets to varying degrees. The most frequently cited destinations were the United States, Japan, the United Kingdom, the Netherlands, Belgium, and Germany, with some also exporting to Australia and Scandinavia. While a few respondents claimed export activity in over 30 countries, most focus on a core of 5 to 10 markets, often relying on personal networks, trade fairs, and long-standing distributor relationships.

Export volumes reported by the producers range from **10% to 60% of their annual output**, depending on winery size, wine typology, and market maturity. Producers of organic or niche varietals, especially Verdicchio and Pecorino, report strong demand abroad, particularly from importers focused on natural and sustainable wines.

The wines most frequently exported are white wines, with **Verdicchio playing a central role**. Some red and sparkling labels are also represented, but the export profile strongly aligns with wines of territorial character. This coherence between identity and market positioning contributes to destination branding and supports Marche’s visibility as a source of distinctive wines.

Despite these strengths, significant barriers remain. Survey respondents noted that **logistics, price pressure**, and **irregular order frequency** are major obstacles.

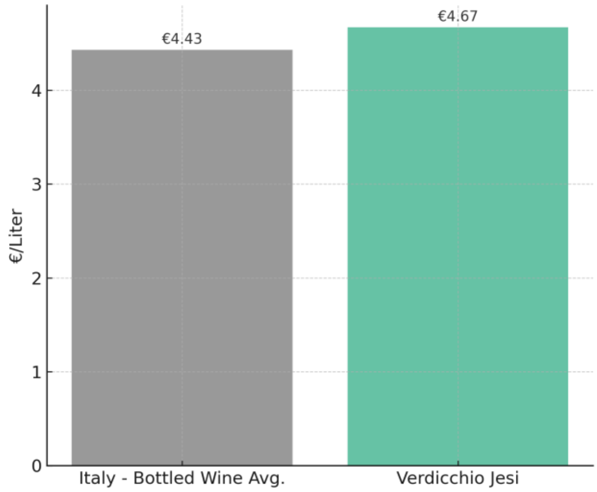
Finding reliable importers who understand artisanal production cycles is a persistent challenge. These difficulties echo existing literature on the vulnerabilities of small-scale producers in global wine markets (Anderson, 2004).

Another recurring limitation is the underdevelopment of direct-to-consumer (DTC) infrastructure. Although some producers engage in e-commerce or post-visit shipping for tourists, most lack integrated platforms or multilingual content. In this context, wine tourism emerges as a strategic complement to exports, fostering direct engagement with foreign visitors and strengthening brand loyalty through experiential channels.

When compared to national benchmarks, Marche's export profile reveals an orientation toward higher-value categories. In 2024, the average price per liter of Italian wine exports was **€3.76**, with still bottled wines averaging **€4.43/liter**, and bulk wine only **€0.84/liter** (*Osservatorio del Vino*, 2024). According to IMT data, **Verdicchio dei Castelli di Jesi is exported at an average price of €4.67/liter**, placing it above the national average for bottled wines and aligning it with quality-driven positioning. This further supports the idea that Marche is not competing on volume, but rather on authenticity and perceived value, a strategic stance that complements its enotourism potential and reinforces the relevance of integrating experiential branding into its international strategy.

This chart compares the export price of Verdicchio dei Castelli di Jesi (€4.67/l) with the national average for bottled wine (€4.43/l), showing that Marche can compete through value and identity.

Figure 7 - Average Export Price per Liter – Verdicchio vs. Italian Bottled Wine



Source: IMT Osservatorio Vinitaly 2025; Osservatorio del Vino

In sum, Marche's export orientation reflects a mix of structural limitations and strategic potential. While volumes remain moderate, the quality and identity of exported wines are well aligned with market trends. Future strategies to support internationalization should include improved logistics, enhanced digital infrastructure, and stronger synergies between enotourism and export storytelling.

Strategic Takeaway

Marche's wine production structure is inherently aligned with the demands of high-value, low-volume enotourism and niche export strategies. The predominance of small and medium producers, many of them artisanal and Slow Wine-recognized, creates ideal conditions for curating premium experiences and developing direct-to-consumer relationships. However, this same structure limits scalability and international visibility, underscoring the importance of selective internationalization and partnerships with trusted intermediaries. Any commercial model must leverage the symbolic capital of the region while compensating for logistical and infrastructural constraints.

3.3 Enotourism Infrastructure and Experiences

3.3.1 Tourism Infrastructure and Enotourism Practices

Building upon the broader national classification discussed earlier, this section focuses on a group of regions that most closely resemblance Marche in terms of scale, recognition, and development trajectory. The selected peers, **Sicilia**, **Campania**, and **Emilia-Romagna**, were identified based on their shared classification in the ***Slow Wine 2025*** **"Consolidated"** or adjacent groupings, and their visibility in awards and wine tourism infrastructure.

The comparison focuses on three key dimensions:

1. **Wine Tourism Infrastructure:** While all four regions maintain a similar number of wineries (between 102 and 112), there are striking differences in their hospitality and gastronomic offerings. Marche stands out with:
    - The **highest number of wineries offering hospitality** (22), surpassing

Sicilia (13), Campania (19), and Emilia-Romagna (13).

  - A **notably high ratio of hospitality per winery** (0.203), higher than all other regions in the group.
  - A slightly lower ratio of winery-affiliated restaurants (0.213) compared to Campania (0.402) and Sicilia (0.308), but significantly ahead of Emilia-Romagna (0.134).

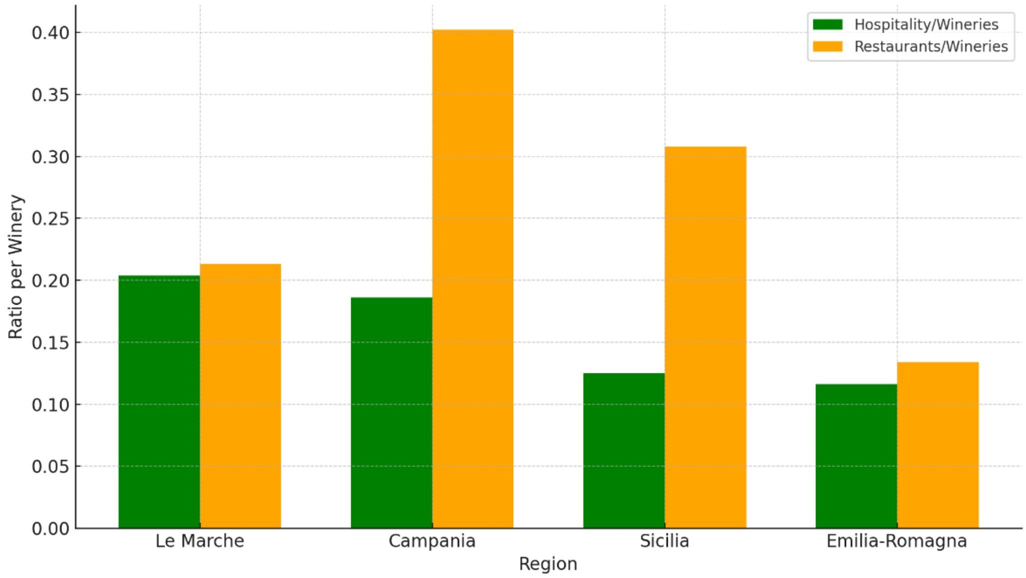
2. **Recognition in Slow Wine 2025:** In terms of quality recognition:
  - Marche received **42 Top Wine** awards, similar to Campania (47) and Emilia-Romagna (51), and just behind Sicilia (51).
  - For **Vino Slow** awards, Marche earned **32**, behind Sicilia (40), Campania (35), and Emilia-Romagna (36).

This shows that whiMarche competes effectively in terms of technical excellence, it slightly lags behind in wines recognized for their alignment with Slow Food values, highlighting an opportunity to further consolidate its reputation in this area.

3. **Strategic Positioning**: The following chart compares the hospitality and gastronomic capacity of the four benchmarked regions in relation to their total number of wineries.

Marche stands out with the highest ratio of hospitality offerings per winery, reinforcing its readiness to support immersive wine tourism. Campania and Sicilia exhibit higher restaurant integration, suggesting a gastronomic-centered model.

Figure 8 - Ratio of Hospitality and Restaurant Services per Winery (2025)



Source: Own elaboration based on Slow Wine 2025.

Emilia-Romagna trails in both indicators. Together, these contrasts illustrate Marche's unique position to deliver a balanced and experience-oriented approach to wine tourism.

Overall, Marche emerges as the most **hospitality-prepared** region in its group, with strong infrastructure for immersive enotourism experiences. Its **balanced profile** of awards and services, combined with the highest relative growth in *Chiocciole* among its peers, positions it as a dynamic territory with potential to differentiate through quality, sustainability, and experience design.

The contrast with regions like Campania and Sicilia, strong in terms of awards but more dependent on gastronomic identity, suggests that Marche can compete not only through its wines but also through the **integration of place-based experiences** that reflect the ethos of a slow, authentic wine culture.

This benchmarking confirms that Marche is not only performing solidly but may be **better prepared than its direct peers** to capitalize on the experiential and sustainable dimensions of wine tourism growth.

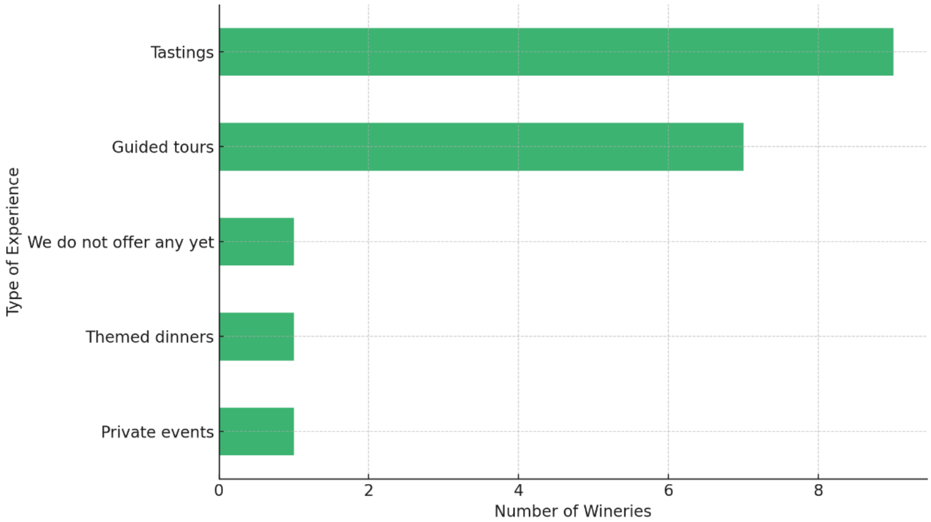
3.3.2 Insights from Regional Producers

To complement this comparative perspective, insights from a survey administered to regional wine producers provide additional context. When asked whether they currently receive international tourists, most respondents answered affirmatively, though the frequency and intensity of visits varied. Many reported seasonal peaks or occasional visits, while a smaller subset indicated regular foreign tourism throughout the year.

The most common enotourism experiences offered include wine tastings and guided tours of vineyards and cellars. Less frequently, wineries offer food pairings, educational activities, or harvest-related events.

Based on survey data, this figure illustrates that guided tastings and vineyard tours are dominant, while more structured or complex offerings, such as workshops or themed events, remain less developed.

Figure 9 - Types of Enotourism Experiences Offered by Wineries



Source: Own elaboration based on survey data.

Despite this diversity, the offerings are often informal and vary in terms of professionalization. Few wineries report having dedicated staff or purpose-built spaces for hospitality. Even fewer offer multilingual support or digital booking platforms. As a result, visibility to international audiences remains limited, often relying on personal networks or basic listings.

The survey also identified key barriers to further enotourism development: logistical constraints, lack of time, limited trained staff, and financial resources. Many producers noted the challenge of balancing tourism with agricultural routines, especially during harvest and production phases. This reflects broader findings in the literature about the tension between winemaking and tourism in small-scale operations (Alonso and Liu, 2012).

Encouragingly, there is substantial interest among producers in expanding their enotourism potential. Many expressed willingness to join structured initiatives, such as wine routes or thematic programs, provided there is adequate support in terms of coordination, promotion, and technical assistance. This aligns with recent research on the importance of collaborative frameworks and institutional backing for rural tourism (Kastenholz et al., 2014).

In short, Marche has more hospitality-oriented wineries than its direct peers, a comparable number of recognized wines, and a network of producers willing to expand their offerings. While the foundation is strong, unlocking the region's full enotourism potential will depend on greater coordination, communication, and support.

Strategic Takeaway

The region's tourism infrastructure remains uneven, with gaps in coordination, service capacity, and digital readiness. Yet producers show openness to international engagement, and the region benefits from authentic assets that are difficult to replicate. The findings suggest that wine tourism in Marche can flourish if reframed not as mass visitation, but as a system of curated, small-scale experiences, designed for high-affinity travelers and linked to export goals. The challenge lies in facilitating that transformation through training, digital tools, and improved integration across stakeholders.

3.4 Gaps, Advantages, and Unexploited Assets

Building on the structural profile and territorial analysis developed in the previous sections, this part of the chapter shifts toward a more strategic assessment of Marche's potential as a wine tourism destination. The goal is to move beyond description and develop a multidimensional diagnosis that can inform the project's design and implementation phase.

To do so, the region is examined through three interrelated lenses: first, its **strategic gaps**, which currently hinder international positioning and visitor engagement; second, its **structural advantages**, which provide a solid foundation for differentiation; and third, its **unexploited assets**, which could be activated to enhance experiential value and market appeal. This framework allows for a nuanced understanding of both constraints and opportunities, and helps define what kind of interventions, narrative, infrastructural, organizational, might be most effective.

Marche offers a rich tapestry of wine, culture, and landscape, yet its potential remains only partially realized. By analyzing where the region falls short, where it excels inherently, and what resources remain underleveraged, the project can formulate a development strategy that is not only ambitious, but also aligned with the region's identity and capabilities. The following subsections examine these three dimensions in turn, drawing on contemporary literature and comparative insights from more established destinations such as Tuscany and Rioja

3.4.1 Strategic Gaps

Despite the recognized quality of its wines, Marche continues to struggle with a fragmented and weakly projected identity in international wine tourism circuits. Unlike Tuscany, whose name evokes an iconic synthesis of cultural prestige, landscape, and curated experience, Marche lacks cohesive branding and global recognition. As noted by a regional official in 2023, 'abroad they still don't know it exists.' This underexposure is not merely a matter of promotion, but reflects a deeper deficit in symbolic capital and narrative articulation (Bourdieu, 1984; Beckert et al., 2017; Cavicchi et al., 2011; Pike & Page, 2014). While public investment in marketing has increased, these efforts remain insufficiently integrated into a compelling and unifying territorial story.

A second gap lies in stakeholder coordination and governance. Although "Strade del Vino" were legally established in 1999, collaboration among wineries, municipalities, and tourism actors has been inconsistent. Festa et al. (2019, 2020) and Bregoli et al. (2016) point to "unclear governance" and "weak public-private interactions" as typical weaknesses of Italian wine tourism planning. Events like Cantine Aperte were not part of a broader strategic vision. This lack of integration has led to fragmented visitor experiences, variable service quality, and missed opportunities for regional branding.

A third issue is the limited involvement of professional travel intermediaries. Historically, local agencies focused on outbound travel, and few inbound packages featuring Marche exist. Without structured itineraries or bundled experiences, tourists must rely on self-guided visits. Even those interested in Marche struggle to plan a visit due to limited information and logistical support. This is compounded by a weak digital presence: many wineries lack multilingual websites, real-time booking, or coordinated online platforms. Alebaki et al. (2022) identify this digital gap as a common issue in Mediterranean wine destinations, reducing international accessibility.

Infrastructure is another constraint. While scenic, the region's geography complicates travel between wine zones. Public transport is sparse, signage inconsistent, and many cellar roads are narrow and winding. Compared to Rioja or Chianti, where centralized towns act as tourism hubs, Marche's layout is less conducive to spontaneous exploration. Ancona's improved airport links offer promise, but internal connectivity still limits visitor flow, especially for those without private vehicles.

Finally, the human capital dimension presents a challenge. Many producers excel in winemaking but lack training in hospitality, foreign languages, and experience design. Tourism has often been viewed as a distraction from production. Marzo-Navarro and Pedraja-Iglesias (2009) and Alonso et al. (2015) highlight this reluctance in emerging wine regions. Though generational shifts are gradually improving openness to tourism, gaps in service skills persist. Addressing these will require targeted training and knowledge transfer from more mature wine tourism destinations.

The survey administered to producers further enriches this picture. When asked whether they currently receive international tourists, the majority responded affirmatively, though the intensity and frequency of such visits vary. Several respondents noted that they receive foreign tourists only occasionally or during peak seasons, while others reported regular visits throughout the year. Among the experiences offered, the most common are wine tastings and guided tours of vineyards and cellars. A smaller subset of producers also offers food pairings, educational activities, and participation in harvest-related events.

As previously illustrated in Figure 4, guided tastings and vineyard tours are the most common enotourism activities, while more complex experiences are rare. This confirms that offerings remain mostly informal and uneven in terms of professionalization

These offerings, while diverse, tend to be informal and vary widely in terms of quality and professionalization. Only a minority of wineries reported having dedicated staff or infrastructure for hospitality, and fewer still offer multilingual support or digital booking systems. As such, many producers rely on personal contacts, local word-of-mouth, or basic listings on tourism portals to attract visitors, limiting their visibility to international markets.

The survey also revealed several perceived barriers to expanding enotourism activities. Chief among them were logistical and organizational difficulties, followed by a lack of time, trained personnel, and financial resources. Several producers highlighted the difficulty of integrating tourism into their daily production routines, especially during critical agricultural periods. These challenges are not unique to Marche; as noted by Alonso and Liu (2012), small wineries in emerging wine regions often face tensions between production priorities and tourism aspirations.

3.4.2 Structural Advantages

In contrast to its gaps, Marche possesses several structural advantages that offer a solid base for wine tourism development. These include geographic diversity, cultural richness, a strong enogastronomic identity, and a resilient entrepreneurial ecosystem.

First and foremost, Marche's varied landscapes, ranging from the Sibillini Mountains to Adriatic beaches, enable a diversity of experiences in compact distances. A tourist can tour vineyards in the morning, explore a medieval village in the afternoon, and dine by the sea in the evening. This scenic and experiential variety appeals to contemporary travelers who seek multifaceted destinations (UNWTO, 2020). Unlike monocultural wine areas, each subzone in Marche (e.g., Jesi, Piceno, Conero) has a distinct identity, adding to its allure. Its landscapes remain largely untouched by mass tourism, preserving an authenticity valued by "slow tourism" enthusiasts.

The cultural heritage is equally compelling. Towns like Urbino, Recanati, and Ascoli Piceno offer dense layers of history, architecture, and artistic legacy. These assets allow for the integration of wine tourism with cultural sightseeing. Visitors can pair tastings with Renaissance art, historic festivals, or operas, enriching their overall experience (McIntosh & Prentice, 1999; Richards, 2018). Many wineries are housed in historic estates, and some even include centuries-old cellars, giving depth to the wine narrative. Culinary traditions complement this heritage. Regional dishes like vincisgrassi, truffles from Acqualagna, or olive all'ascolana pair naturally with local wines, reinforcing Marche's identity as both a wine and food destination.

From a production standpoint, Marche offers a diverse and high-quality portfolio. Its 16 DOC and DOCG designations encompass whites like Verdicchio, reds like Rosso Conero, and sparkling wines like Vernaccia di Serrapetrona. This variety allows the region to cater to diverse palates and motivates repeat visits. The small-to-medium scale of most wineries enhances visitor intimacy. Guests are often welcomed by the owners themselves, fostering emotional connection and authenticity, key assets in rural tourism (Duarte Alonso & Liu, 2012).

Another advantage lies in Marche's socio-economic fabric. Known as part of Italy's "Third Italy" model, the region has a high density of family-run SMEs, cooperative networks, and a strong rural entrepreneurship tradition (Becattini, 2001; Pato & Teixeira, 2016). This ecosystem has already fostered agritourism and small-scale hospitality. Local pride in hosting guests often translates into personalized service, and tourism remains welcomed rather than commodified. The rise of experiential offerings like vineyard dinners and chef collaborations illustrates the grassroots innovation that characterizes the region.

Furthermore, educational institutions like the universities of Urbino, Macerata, and Ancona are beginning to support tourism development through research and training. Projects like “Marche Food and Wine Memories” exemplify this synergy between academia and territory.

3.4.3 Unexploited Assets and Positioning Outlook

Beyond its evident strengths, Marche holds numerous underutilized assets that could enrich and differentiate its wine tourism offer. These include intangible cultural heritage, cross-sectoral synergies, symbolic capital, digital potential, and untapped market opportunities.

A first asset is the region’s rich yet underrepresented intangible heritage. Traditions, oral histories, and rural customs, rooted in the mezzadria (sharecropping) system, hold immense symbolic value but are largely absent from the tourist experience. The “Marche Food and Wine Memories” project exemplifies the potential of integrating these stories into tourism. By collecting testimonies and reviving traditional practices, this initiative showed how cultural memory can enhance authenticity and visitor engagement (Cerquetti et al., 2022). However, such efforts remain isolated and lack coordinated support. Embedding this heritage in experiences, such as guided storytelling, harvest reenactments, or wine festivals with cultural themes, would provide Marche with distinctive, immersive offerings. Another underexploited dimension is the integration of wine tourism with other sectors such as art, wellness, spirituality, or outdoor activities. The region is uniquely positioned to create thematic itineraries, e.g., wine and Renaissance art along the Lotto trail, or pilgrimages to Loreto combined with monastic wine history. Nature-based tourism also offers synergy: hiking in the Sibillini Mountains or sailing off the Conero coast could be paired with vineyard visits. These combinations exist in destinations like Rioja or Provence, but in Marche they remain fragmented. With minimal investment, cross-sectoral packages could enhance the tourist experience and attract diverse audiences.

Marche also has a symbolic capital waiting to be activated. While regions like Tuscany and Champagne have developed iconic symbols, the black rooster or sparkling wine rituals, Marche has stories and visuals that remain dormant. The amphora-shaped Verdicchio bottle, the term “balcony vineyards,” or poetic references to “green hills” evoke strong imagery but are not central in branding. Cultural and historic associations (e.g., Emperor Frederick II’s birthplace in Jesi or local wine-related legends) could enrich the region’s narrative and brand identity (Bourdieu, 1986; Pike & Page, 2014). What’s needed is a flagship visual or story to unite these threads and signal Marche’s unique offer to the global market.

From a comparative perspective, the experience of Argentine wine regions offers useful insight. Mendoza, for example, has successfully transformed its terroir narrative and enotourism development into tools for international market positioning. According to Falcón and Mazzini (2018), the region's articulation of wine, landscape, and identity into "aesthetics of authenticity" has allowed even small producers to participate in export strategies. This example reinforces the argument that symbolic capital, when properly narrated, can function as a competitive asset even in structurally peripheral regions. While institutional and logistical contexts differ, the Argentine case validates the strategic potential of enotourism to build reputational value and open new international pathways.

Technology, too, is an underused asset. While earlier described as a gap, it also represents an opportunity. With its scenic vineyards and storytelling potential, the region could develop immersive content: virtual tours, social media storytelling, and influencer marketing. Direct-to-consumer strategies, like wine clubs, post-visit sales, or digital newsletters, could turn visitors into long-term brand ambassadors. A centralized portal for wine tourism could facilitate this shift, building community and loyalty over time (Xiang & Gretzel, 2010).

Finally, the region's relative affordability and capacity for sustainable growth remain under-leveraged. Compared to saturated destinations, Marche offers excellent value and room to expand. Empty village homes could become B&Bs, wineries could scale visitor services, and communities are largely welcoming of tourism. Unlike regions facing overtourism, Marche has the opportunity to grow strategically, learning from others' missteps and ensuring balanced, locally anchored development.

In Latin America, the articulation of underutilized assets into competitive tourism circuits has been extensively studied. In the case of Salta, Argentina, a territory once peripheral to the national wine economy, strategic storytelling, cultural valorization, and selective infrastructure investments allowed for the emergence of a premium wine destination without sacrificing authenticity (Molina, 2020). These experiences underscore the potential of regions like Marche to activate latent symbolic capital and reposition themselves through differentiated, experience-led models.

Strategic Takeaway

Marche's current strategic position is not defined by dominance in volume, infrastructure, or brand recognition, but by an underutilized reservoir of symbolic, cultural, and experiential value. The combination of heritage, landscape, quality-driven production, and tourism potential offers a differentiated platform, one that can become a strength if activated through design, coordination, and narrative.

These findings confirm the region's potential to compete not through scale but through coherence, credibility, and identity. To transition from strategic diagnosis to operational planning, the following SWOT matrix consolidates the key internal and external factors influencing Marche's future in wine tourism and international engagement.

Strategic Synthesis: SWOT Framework

The following matrix summarizes the strengths, weaknesses, opportunities, and threats identified throughout Chapter 3. It serves as a visual bridge between the analytical layers developed in this chapter and the business model framework explored in Chapter 4.

Table 4 – SWOT Analysis

Strengths	Weaknesses	Opportunities	Threats
Strong enogastronomic identity rooted in Verdicchio and other distinctive varieties.	Low international brand awareness and fragmented territorial identity.	Rising global demand for experiential and sustainable tourism.	Competition from consolidated destinations like Tuscany and Rioja.
Artisanal scale of production encourages authenticity and direct engagement with visitors.	Limited logistical infrastructure and internal accessibility.	Market appetite for boutique, identity-driven wines abroad.	Volatility in global trade and logistics (costs, intermediaries, delays).
High proportion of DOC and DOCG wines relative to total output.	Lack of coordinated public-private governance in wine tourism development.	Leverage of wine tourism to open or deepen international export channels.	Risk of over-fragmentation in tourism narratives and offerings.
Slow Wine recognition supports values of sustainability and typicity.	Weak digital presence and underdeveloped DTC export infrastructure.	Potential synergies with culture, nature, and wellness sectors.	Climatic variability affecting small-scale production yields.
Diverse and scenic landscape with coastal, hilly, and historical elements.	Scarcity of trained personnel in hospitality and foreign languages.	Favorable policy frameworks (e.g., Italy’s 2018 wine tourism law).	Dependence on individual initiative in absence of coordinated strategies.

Source: Own elaboration.

This matrix does not replace the layered analytical approach developed throughout the chapter, but rather complements it by offering a condensed snapshot of the region's strategic position. The challenges and assets identified here directly inform the timing, design, and urgency of the proposed model, which are further explored in the next section.

3.5 Why now? Timing, global context, and favorable trends

The current moment presents a strategic window of opportunity for Marche to reposition itself as a leading destination in Italian wine tourism. This momentum is not coincidental but emerges from the confluence of global travel trends, post-pandemic behavioral shifts, institutional evolution, and the region's own maturation in enogastronomic development.

Building on the strategic synthesis consolidated in the preceding SWOT framework, including internal strengths and weaknesses, as well as external opportunities and threats, this section now shifts focus to the temporal dimension of the opportunity. While many of Marche's core attributes have existed for decades, its landscapes, wines, and traditions, what is unique today is the alignment between external demand and internal readiness.

Changes in consumer preferences, increasing appetite for authenticity, sustainability, and small-scale experiences, along with a renewed interest in Italy's lesser-known regions, create a favorable external climate. At the same time, recent shifts in institutional frameworks, improved transportation links, and generational opening among producers strengthen the region's ability to respond.

This alignment is unlikely to remain static. Competing regions continue to innovate, and visibility gaps persist. For Marche to capitalize on this moment, it must act decisively, investing in targeted transformation and positioning itself as Italy's next great wine experience.

Global shifts in travel behavior and post-pandemic recovery

The COVID-19 pandemic significantly altered the global tourism landscape. After an abrupt collapse in 2020, international tourism began a slow but steady rebound, with a renewed emphasis on proximity, health, nature, and meaningful experiences (UNWTO, 2020). Travellers emerging from lockdowns have shown a clear preference for rural settings over crowded urban centers, for outdoor activities over enclosed attractions, and for experiences that connect them with local people, food, and stories (Richards, 2021). Wine tourism, positioned at the intersection of nature, culture, and gastronomy, has been one of the fastest recovering niches in this broader trend.

As a result, destinations that can offer immersive, uncrowded, and authentic experiences have gained strategic appeal. Marche, with its compact geography, low-density villages, and deeply rooted food and wine culture, is ideally suited to respond to this demand. Unlike Tuscany or the Amalfi Coast, which have faced over-tourism and capacity management challenges, Marche still has space, both literally and figuratively, to grow in a sustainable and measured way.

Moreover, the pandemic accelerated digital adoption in travel planning. Tourists now rely more than ever on digital platforms, user-generated reviews, and social media storytelling to choose their destinations (Xiang & Gretzel, 2010). WhiMarche has traditionally lagged in digital presence, this also means that its narrative is not yet overexposed or overdetermined. The region can still shape its online image, invest in visual storytelling, and define the tone and aesthetics of its brand from a relatively blank canvas. This is a rare advantage in an era when many destinations struggle to refresh tired narratives or escape tourism clichés.

Favorable macro-trends: authenticity, sustainability, and slowness

Multiple macro-trends now converge in ways that favor Marche's characteristics. First among them is the global quest for authenticity. Studies in cultural tourism emphasize that contemporary travelers increasingly seek "real" experiences, those rooted in community, tradition, and emotion, over pre-packaged commercial attractions (McIntosh & Prentice, 1999; Richards, 2018). Marche's family-run wineries, untouched landscapes, and intergenerational narratives offer precisely the kind of authentic engagement that discerning travelers crave.

Second is the rise of sustainability and localism. Tourists, especially from younger demographics, are becoming more aware of their environmental and social footprint. This has led to a preference for shorter supply chains, local food and wine, and experiences that support rural economies. The region's small-scale producers, organic farming practices, and low-density development fit well with these values. Initiatives like agritourism and farm-to-table restaurants demonstrate the kind of integrated, sustainable tourism models now celebrated globally (UNWTO, 2020; Pato & Teixeira, 2016).

Third, the slow travel movement has gained renewed traction. Tourists increasingly seek longer stays, deeper immersion, and unhurried itineraries. This trend aligns closely with Marche's territorial scale and rhythm of life. Unlike fast-paced itineraries across Rome-Florence-Venice, a visit to Marche invites contemplation: wine tastings under a pergola, village festivals, hikes between vineyards, and stories passed around a communal table. The region does not need to invent slowness, it lives it.

Fourth, the rise of thematic and hybrid tourism plays to Marche's strengths. Travelers now combine wine with art, wellness, spirituality, or outdoor activities. Marche, as previously discussed, has rich potential for cross-sector itineraries: Renaissance art in Urbino, pilgrimages in Loreto, hiking in the Sibillini Mountains, and beach escapes on the Conero coast, all within close range of wine-producing areas. The opportunity lies in linking these assets into coherent and marketable packages.

Institutional alignment and momentum in Marche

Internally, Marche has entered a phase of institutional readiness that complements these global trends. In 2021, the region passed a dedicated law recognizing wineries as touristic venues, aligning with the national 2018 enotourism law. This formal framework legitimizes wine tourism as an economic sector, unlocking public funding, planning tools, and visibility.

Moreover, the creation of the regional tourism agency (ATIM) and the launch of the "Marche – Let's Marche" brand signal a renewed political will to promote the territory with coherence and ambition. These entities are beginning to coordinate efforts between public institutions, private actors, and tourism professionals. Events like "I Magnifici 16", which showcased all DOC/DOCG wines in a cultural setting, exemplify this new approach: integrated, experiential, and media-savvy.

At the local level, change is also underway. Younger generations are taking over family wineries and showing greater openness to tourism. Investments in hospitality, training, and marketing, though still limited, are growing. Some small villages have started reclaiming empty houses for tourist accommodation, and collaborations between producers and chefs are becoming more common. What was once scattered initiative is starting to resemble strategic direction.

This institutional alignment creates a rare window where vision, tools, and momentum coincide. Acting now would allow Marche to define its identity before others do it for them, to structure its offer before massification, and to engage communities while they are still enthusiastic and not overwhelmed.

Comparative momentum: how others seized their moment

Looking at other regions reinforces the importance of timing. Tuscany's wine tourism boom did not happen spontaneously. It was the result of coordinated branding efforts in the 1980s and 1990s, supported by regional policy, infrastructure investment, and a narrative export through media and film. Rioja's transformation in the early 2000s similarly combined modern winery architecture, event tourism, and aggressive branding. Both regions capitalized on a moment when their assets matched global interest and moved quickly to occupy mindshare.

Marche is now at a similar crossroads. It has not yet become a tourism cliché; its stories remain fresh; its villages still welcome. If it waits too long, it risks losing early-mover advantage to emerging competitors in other lesser-known Italian or European wine regions. But if it acts now, coherently and ambitiously, it can define a space in the market as "Italy's most authentic wine region," leveraging its quiet beauty, plural identity, and storytelling depth.

Risks of inaction and the cost of delay

Failing to act during this window could have long-term consequences. Without investment in coordinated promotion, training, and infrastructure, the region may continue to underperform relative to its potential. Visitors who do arrive may leave underwhelmed, reducing word-of-mouth growth. Local communities may become skeptical about tourism's benefits if they don't see value or participation. More established regions may consolidate their dominance, while global attention shifts elsewhere.

The cost of delay is not just economic. It is also cultural. Without sustainable tourism, young people may leave rural areas, historic wine villages may decay, and traditional knowledge may fade. Tourism, if properly managed, can be a tool for territorial preservation and intergenerational transmission. But this requires leadership, planning, and timing.

The convergence of favorable global trends, institutional awakening, and growing internal capacity make this a decisive moment for Marche. Never before has the region had such alignment between what the world wants, authenticity, sustainability, slowness, and what it organically offers. But windows of opportunity do not remain open forever. The next few years will determine whether Marche becomes Italy's next great wine destination or remains a beautiful secret known only to a few. Acting now, with vision and coordination, is not just strategic, it is necessary.

CHAPTER 4: Business Project Design

Building a viable business project is essential to transform the strategic opportunity identified in Chapter 3 into a sustainable and scalable experiential enotourism initiative. The previous chapter concluded with a SWOT analysis that exposed both the region's structural constraints, such as fragmented branding, limited coordination, and underdeveloped infrastructure, and its significant experiential assets and global potential. These findings pointed to the need for a hybrid strategy capable of transforming symbolic capital into long-term economic value through a curated, relational, and commercially-oriented approach.

This chapter presents the architecture of that strategy: a business project designed to connect artisanal wine producers in Marche with international wine lovers. Through high-engagement visits, professional coordination, and phased commercial activation, the initiative aims to bridge local production with global demand in a way that is both immersive and commercially viable. Framed by contemporary tools such as the Business Model Canvas (Osterwalder & Pigneur, 2010), the model integrates value proposition design, commercial pathways, operational logistics, digital tools, and financial projections into a cohesive blueprint.

To ensure its contextual coherence and feasibility, the model draws not only from strategic literature but also from direct field research. Four in-depth interviews were conducted with selected wineries previously surveyed in Chapter 3.2. These producers were chosen for the recognized quality of their wines and for representing the grape varieties that define Marche's oenological identity. Located across diverse subzones, they offer a cross-section of the region's viticultural landscape. Their perspectives reinforce the model's alignment with real-world conditions and aspirations, and actively shaped its final configuration.

4.1 Value Proposition and Experience Design

In response to the structural gaps outlined in Chapter 3.3, including fragmented experiences, weak coordination, and the absence of bundled premium offers, the value proposition is designed as a curated, high-engagement alternative capable of offering both emotional depth and commercial relevance.

The core value proposition of this enotourism project lies in its capacity to merge exclusivity, authenticity, and international opportunity. Rather than offering conventional tastings or guided tours, the experience is carefully curated to attract individuals who value not only exceptional products but also meaningful connections with the people and territories behind them. These are **wine lovers**, whether professionals or not, who appreciate the richness of artisanal methods, the beauty of vineyard landscapes, and the human stories embedded in each bottle. For them, wine is not merely a beverage but a narrative of origin, identity, and intention.

Within this broad group, the project identifies two distinct yet complementary visitor profiles. The **primary target segment** is composed of international wine lovers who are also professionally involved in the trade, such as restaurateurs, distributors, and independent sommeliers. These visitors are central to the long-term vision of the project, not only because of their potential to initiate import agreements, but also because of their role as **disseminators of the experience**. A restaurant owner who connects emotionally with a winery and integrates its micro-productions into their wine list becomes an amplifier of the visit, conveying its meaning to a broader audience of final consumers. This reputational multiplier effect transforms the individual experience into a shared narrative that travels across borders, at the table, in conversation, and through symbolic association.

However, reaching this audience and converting engagement into long-term partnerships requires time, trust, and, in some cases, a gradual increase in production capacity by participating producers. This is a strategic horizon rather than an immediate reality.

In the short term, a **secondary segment** of culturally motivated travellers, including cruise passengers arriving in Ancona, plays a vital enabling role. While not directly involved in the wine trade, these visitors represent an accessible audience for emotionally resonant and sensorial experiences. Their participation can generate immediate revenue, boost visibility, and contribute to the financial sustainability of the project in its early phases. In this sense, traditional tourism serves as both a testing ground and a financial catalyst, supporting local wineries as they build capacity and consolidate international commercial relationships.

Anchored in the principles of the experience economy (Pine & Gilmore, 1999), the visit is conceived as a sensorial and participatory narrative in which guests engage directly with producers. Rather than passive consumers, visitors become co-authors of the experience, immersed in the terroir through guided storytelling, cultural cues, and curated tastings. The deliberate choice of small-scale, family-run wineries reinforces a sense of exclusivity and emotional proximity that is increasingly valued in post-luxury travel contexts (Schmitt, 1999; Ponsignon et al., 2024).

Recent studies reinforce the importance of these experiential elements. For example, Ponsignon et al. (2024) demonstrate that characteristics such as surprise, comprehensibility, interactivity, and aesthetic immersion significantly enhance both epistemic and hedonic value in wine-related experiences. These factors contribute to a deeper visitor engagement and to higher levels of satisfaction. Likewise, Silva and Correia (2022) found that aesthetic and educational dimensions are among the most influential drivers of visitor satisfaction in wine destinations.

Moreover, the experience is not designed as a passive consumption act, but as a co-designed experience. Interactions with local producers and the surrounding community enable international visitors to become active participants in shaping the meaning and value of the visit (Rachão et al., 2021; Prahalad & Ramaswamy, 2004). This participatory logic reinforces the project's identity as both immersive and purpose driven.

Beyond the emotional and cultural resonance, the value proposition is amplified by its commercial orientation. Guests are encouraged to establish long-term partnerships and access exclusive micro-productions for their own markets, bridging the experience with a direct import pathway. This hybrid positioning, between high-end tourism and market development, constitutes a distinctive competitive advantage.

As highlighted by Perrin & Soulard (2020), conviviality plays a pivotal role in the perceived quality of wine tourism experiences. Shared meals, informal conversations, and the warmth of local hospitality are not ancillary, they are emotional catalysts. These elements foster trust, belonging, and symbolic value, reinforcing both visitor satisfaction and the foundation for long-term commercial relationships.

These affective and symbolic layers are not ends in themselves; they lay the groundwork for a structured commercial pathway, as outlined in the next section.

As discussed in Chapter 2, Tuscany represents a global benchmark in the field of luxury wine tourism, with its refined infrastructure, territorial branding, and symbolic capital. However, replicating that model in Marche, at least in the short term, would not only be unfeasible due to the region’s current developmental stage, but also strategically unwise.

Rather than replicating Tuscany's model, this initiative reinterprets its core experiential principles, authenticity, emotional resonance, and curated hospitality, through the lens of Marche's artisanal identity and operational scale, within a more intimate, accessible, and territorially grounded framework. The objective is not to scale down luxury, but to redefine it in terms of connection, narrative richness, and artisanal uniqueness.

This differentiated positioning does not imply a lower standard, but a conscious choice to cultivate a form of quiet exclusivity that appeals to discerning visitors who prioritize meaning over spectacle. By offering immersive, purpose-driven experiences at a more accessible price point, the project aligns with the expectations of a growing segment of post-luxury travellers, those who seek cultural depth, ethical value, and personal engagement.

This reframing of value is not only more coherent with the current context of Marche but also forms the conceptual bridge toward the project's commercial strategy, where emotional resonance and trust become essential foundations for long-term business relationships.

These conceptual foundations were not only informed by theoretical literature and strategic framing but also echoed in direct fieldwork conducted across the region. Interviews with selected producers confirmed a strong alignment with the experiential logic proposed in this model. Their responses consistently aligned with the principles outlined above, emphasizing small-scale formats, personal interaction, and the narrative value of place. One winemaker noted: *"We want to host people who are truly curious, who respect our space and our rhythm."* Another added: *"People love when we explain things personally. We don't have guides. We are the ones who welcome them."* These statements underscore a widespread willingness to engage directly with visitors and to preserve the artisanal integrity of the experience, elements that are crucial to the positioning strategy proposed in this model. The role of authenticity as a driver of visitor satisfaction was also highlighted by a sommelier interviewed for this study: *"It has to feel real. The tourist must understand that they're not just drinking a good wine, they're drinking a story, a place, a family."*

4.2 Commercial Strategy: From Visit to International Shipping

While the experience itself generates emotional and symbolic value, its long-term relevance depends on the ability to sustain the connections initiated during the visit. Rather than pursuing a conventional export strategy, the project seeks to create a context in which meaningful human encounters may evolve into ongoing relationships, personal, cultural, and occasionally commercial, if and when both parties desire it. The physical encounter becomes the starting point of a potential dialogue, grounded in mutual trust, shared values, and emotional resonance, rather than in transactional intent.

Rather than separating tourism from commerce, the model embeds commercial activation within the visit itself. The goal is not to adopt a conventional export posture, but to allow commercial relationships to **emerge organically from the experiential bond** created on-site. This subtle but strategic distinction reframes the role of trade: not as an abstract objective, but as a possible continuation of a meaningful human encounter.

At the core of this strategy lies a shift from transaction-based tourism to relationship-based trade. The project targets international professionals with purchasing power and market access, particularly restaurateurs, independent sommeliers, and boutique importers, who are not merely visitors but potential long-term partners. By embedding commercial intent within a context of personalized interaction and mutual trust, the initiative offers a differentiated pathway to internationalization for small-scale wineries that otherwise face significant structural barriers to export (Festa, Cuomo & Sciarelli, 2017).

Recognizing that this transformation cannot happen overnight, the commercial strategy is designed with a phased logic. The tourism segment, composed of culturally motivated international visitors, plays a catalytic role in the early stages. While these visitors may not directly initiate commercial partnerships, their participation generates immediate revenue, stimulates visibility, and increases the circulation of product and narrative. By supporting sales in the short term, they enable wineries to strengthen their operations and invest in readiness for future international agreements. Far from being peripheral, the broader tourism audience plays a foundational role in enabling the long-term commercial transition.

International cases from Latin America also illustrate the commercial synergies between tourism and wine exports. Studies on the Uco Valley in Argentina, for instance, show that a growing number of export-oriented wineries leverage the physical visit as a platform for long-term trade relationships. As observed by Gómez and Lupi (2020), high-involvement tourism enhances customer loyalty, facilitates DTC sales, and contributes to the international visibility of emerging appellations. These findings support the model's core assumption that experiential design and commercial strategy must be conceived as an integrated system, especially in contexts where producers lack traditional scale advantages.

The post-visit phase is not a residual touchpoint but a core component of the commercial architecture. Each participating winery is prepared to formalize small-scale agreements or trial shipments shortly after the visit. These transactions are facilitated by a centralized coordination unit, responsible for managing documentation, compliance, shipment consolidation, and post-visit communication. This intermediary structure plays a vital role in reducing administrative complexity, particularly for producers with limited international experience (Vissak, Francioni & Musso, 2017).

The commercial logic, however, does not presuppose that all producers must scale up or reconfigure their operations. Rather, the structure is designed to allow small wineries to engage in export selectively, at their own rhythm, and without altering their artisanal essence. The aim is to **support international access without industrialization**, a form of export rooted in relationships rather than volume.

To enhance operational flexibility, the model adopts a multi-channel strategy. First, it encourages on-site B2B interactions during the visit, where purchase decisions may be initiated. Second, it provides an online platform for follow-up orders, shipment tracking, and continued communication with producers. Third, the model facilitates framework-style arrangements with importers seeking seasonal or recurring deliveries, bundling micro-orders from multiple wineries into a unified export stream.

In addition to its trade function, the experience itself contributes to the marketing dimension. International visitors are encouraged to share their impressions and insights, professionally and informally, thereby amplifying both producer positioning and the regional brand narrative. This form of authentic advocacy supports both the producers' positioning and the identity of Marche as a premium, discoverable origin (Silicon Valley Bank, 2023).

Importantly, the experience design and the commercial strategy are not conceived as separate dimensions, but as mutually reinforcing components. As noted by

Hillebrand Gori (2023), well-structured enotourism models that integrate storytelling, commercial follow-up, and coordinated logistics can significantly increase export potential and long-term viability.

Ultimately, the proposed strategy seeks to establish a recurring export mechanism grounded in interpersonal trust, narrative coherence, and logistical competence. It is a model adapted to the realities of small producers, yet capable of bridging local scale with international reach through an experience-led, professionally supported structure.

These commercial assumptions were echoed in multiple interviews conducted with local producers and sector professionals. Several respondents emphasized that current export relations are primarily informal and rely heavily on personal connections, international fairs, or opportunistic contacts. As one producer noted: *"Our export markets are the result of personal networks, not coordinated strategies."* Another stated: *"Finding reliable importers is harder than producing good wine."* These insights confirm the need for a more structured, hybrid model, one that integrates the affective power of on-site experiences with post-visit logistics and digital continuity. As highlighted by a sommelier: *"Meeting and talking directly with the winemaker is key. The experience must be personal and authentic."* These findings support the proposed shift from transactional export to relationship-based internationalization.

In essence, this commercial strategy does not treat export as an industrial mandate, but as a **natural continuation of the experiential relationship**. It offers a pathway for producers to reach international markets without assuming the profile of an export company. Instead of adapting to distant intermediaries, they receive guests, share their stories, and, if mutual trust is established, initiate trade on human terms. This approach preserves scale, strengthens identity, and transforms the enotourism encounter into a slow, deliberate, and emotionally anchored gateway to the global wine economy.

In this sense, the commercial strategy is not defined by scale, but by continuity of meaning. What begins as an immersive, affective encounter can evolve into a shared trajectory between producers and international guests, one rooted in memory, dialogue, and the mutual recognition of value. The visit is not the end point of the experience but its beginning. By preserving the emotional integrity of that encounter and enabling future contact when desired, the project offers a more humane, adaptable, and context-sensitive model of internationalization, one that aligns with the rhythms, identities, and aspirations of artisanal wine producers.

4.3 Operational Structure: Team, Alliances, Logistics.

The implementation of a coherent and high-quality enotourism experience requires a purpose-built operational model tailored to the specificities of Marche's small-scale producers and international visitors. Rather than relying on external tour operators or decentralized networks, the project adopts a centralized coordination unit to manage the complexity of stakeholder interactions—winemakers, guests, logistics agents, and cultural institutions—while safeguarding the intimacy and narrative depth that define its experiential identity. This centralized approach allows for consistent quality control, curatorial oversight, and symbolic coherence across all phases of the visitor journey.

It must enable small producers to offer professional experiences without developing costly in-house systems, and support a transition from short-term tourism income to long-term commercial relationships. Rather than replicating a conventional tour operator model, the project adopts a lean, modular architecture centered on curation, coordination, and narrative coherence.

At the heart of the operational model is a centralized coordination unit that serves as the connective tissue between producers, visitors, and commercial partners. Its responsibilities are structured around three key functions:

(1) **Experience design and scheduling**: working closely with selected wineries to curate visits that reflect the project's values of intimacy, storytelling, and artisanal excellence;

(2) **Logistics facilitation**: managing the post-visit handling, consolidation, and shipment of wine purchases made by guests, according to the specific quantities and combinations requested from each participating winery;

(3) **Relational continuity and follow-up**: maintaining contact with visitors after

their return home, offering support for potential re-orders, introducing new products aligned with their preferences, and sustaining the emotional connection established during the visit.

This unit does not replace the individuality of each winery but enables them to participate in a shared, high-quality ecosystem without the burden of building in-house expertise in tourism management or international sales. Beyond its operational function, it acts as a **strategic mediator**, ensuring that the experience remains coherent and scalable while preserving each producer's unique identity.

Functioning as both facilitator and integrator, the coordination team ensures consistency across experiences, provides communication support where needed (e.g., translation, itineraries), and acts as a single point of contact for buyers seeking to place orders across multiple producers. Its design is deliberately lean, composed of specialized roles in logistics coordination, partnership management, and content curation, supported by external advisors in legal, accounting, and digital systems.

The structure privileges **agility and focus**, with clearly defined scopes of action that prevent bureaucratic excess while ensuring high-quality execution. Each team member contributes to upholding the coherence between storytelling, logistics, and relational follow-up, key dimensions in a model that seeks to merge symbolic value with commercial potential. This operational minimalism is not a weakness but a strategic design choice: it allows the project to grow gradually, to test and refine formats, and to remain economically viable without compromising its identity.

The effectiveness of the operational model relies on a network of carefully selected partners who align with the project’s values and standards. **Participating wineries** must meet criteria not only in terms of product quality and narrative distinctiveness, but also in their capacity to offer a high-level hospitality experience. This includes appropriate tasting spaces, responsiveness to international guests, and a willingness to integrate into a coordinated system of visits, logistics, and post-visit follow-up. Participating producers retain operational autonomy while adhering to shared criteria that ensure consistency across the visitor experience.

The same selectivity applies to **accommodation partners**. Guest houses and carefully selected lodgings must reflect the project's principles of authenticity, comfort, and service excellence. These venues serve as logistical anchors for the experience and reinforce its atmosphere of curated intimacy.

In certain strategic markets, the project may also collaborate with **Italian sommeliers** based abroad. These professionals are not part of the operational core but may act as informal facilitators when appropriate, introducing qualified contacts, recommending the experience within their networks, or supporting the organization of high-value visits. Their involvement remains flexible and case-specific, preserving structural independence while strategically activating their reputational capital. This type of external alliance enriches the project’s outreach capacity without compromising its autonomy or scalability.

To facilitate international sales and minimize operational burdens for small producers, the project provides a shared logistics infrastructure based on consolidation and coordinated export management. Rather than requiring each winery to handle shipments individually, wines are prepared under unified protocols and gathered at a regional hub. From there, licensed export agents manage packaging, documentation, and international freight, allowing for efficiency without detachment.

A key operational function of the coordination unit is the aggregation of visitor purchases into a single outbound shipment. Since each guest often selects two or three bottles from multiple producers, the coordination team manages the collection and consolidation of these items into a unified parcel. This approach ensures that the buyer receives one coordinated delivery, not several disconnected ones, thereby reducing logistical complexity and shipping costs.

More importantly, this unified shipment reflects the **experiential logic** of the visit: the wines are not just grouped for practical reasons, but presented as a curated narrative across different identities and terroirs. The box the guest receives at home becomes a physical extension of the visit, evoking not only flavors, but memories, places, and relationships. It is both a logistical product and a symbolic artifact.

Importantly, the logistical system described here does not constitute a formal export operation managed by the project. The shipments facilitated are framed as small-scale, guest-initiated purchases, comparable to the international transport of souvenirs or goods for personal or professional gifting. All orders are processed through existing courier and postal services, in accordance with the legal frameworks governing cross-border dispatch of consumable products. The project's role is limited to organizing consolidation, ensuring packaging integrity, and assisting with documentation when necessary. This approach allows guests to continue their connection with the producers after their visit, without transforming the project into a commercial intermediary or altering the legal status of participating wineries.

This cooperative mechanism also reinforces cohesion among participating producers. By collaborating on packaging, timing, and documentation, wineries become active contributors to a shared regional story, one that favors cooperation over fragmentation.

To uphold the project's relational ethos while ensuring long-term commercial continuity, a set of non-obligatory post-visit mechanisms is proposed. These include optional service contracts, coordination support for export documentation, and tiered commission structures designed to reflect the level of effort and value added at each stage of the buyer–producer relationship. For example, initial transactions may incur a higher coordination fee to cover onboarding and storytelling integration, whereas repeat orders could benefit from reduced or symbolic rates, reinforcing continuity and trust.

Importantly, these tools are conceived as enablers—not intermediaries. Producers retain full autonomy to negotiate terms directly, while relying on the coordination unit when support is needed. This approach reinforces the project's hybrid identity: facilitating commerce without displacing the human connection at its core. By doing so, the model ensures economic viability and professionalism while remaining aligned with the artisanal scale, narrative depth, and relational integrity that define the overall experience.

The operational model proposed here was informed and validated through direct conversations with selected wine producers and sector actors. Their input confirmed the importance of maintaining the winemaker as the central figure in the visitor experience, not as a marketing asset, but as the authentic voice of the territory. As one producer explained: *"We don't have guides. We are the ones who welcome visitors."* This preference for direct engagement supports the model's emphasis on intimacy, trust, and narrative coherence.

The role of the sommelier, while acknowledged as valuable, was clearly seen as **complementary and non-invasive**: *"The sommelier is important, but they must not overshadow the producer's voice."* In this configuration, sommeliers act as cultural mediators, not as protagonists, but as **bridges** who enhance interpretation without interfering with the relational space between guest and host.

The producers also spoke candidly about their **limits of scale** and their desire to preserve quality over volume: *"We can do two visits per day, four to six people* *max."* Rather than being seen as a weakness, this constraint becomes part of the project's strategic identity: a model that is intentionally small, deliberately paced, and aligned with artisanal rhythms. As another winemaker put it: *"We want people who understand how we live. If they buy, great. But the important thing is that they respect what we do."*

These testimonies validate the operational model not only as feasible, but as **coherent with the values, capacities, and aspirations of those it seeks to support**. They demonstrate that authenticity is not a slogan, but a lived practice, and that any structure aiming to support small-scale producers must be grounded in listening, adaptation, and trust.

4.4 Role of AI and Digital Tools in Scaling and Managing the Project

Having outlined the project's value proposition, commercial logic, operational structure, and financial foundations, this final section explores the digital layer that supports and extends the model. Rather than driving automation or scale, digital tools and AI are employed to sustain narrative coherence, logistical fluidity, and guest engagement, particularly in post-visit phases. Positioned at the end of this chapter, this section reflects the project's commitment to growing with intention: scaling relational depth, not volume.

As established in the preceding sections, the project's success depends on its ability to balance artisanal authenticity with professional coordination and international reach. In this context, the integration of artificial intelligence (AI) and digital tools plays a strategic role in scaling, coordinating, and refining the enotourism model. While the foundation of the experience lies in human connection and artisanal authenticity, as emphasized in the value proposition and operational structure, technological infrastructure enhances the project's ability to deliver consistent, high-quality interactions across borders and audiences. It does so not by replacing the human element, but by supporting it with precision, efficiency, and personalized feedback.

One of the most critical components of this digital architecture is an AI-enhanced Customer Relationship Management (CRM) platform. This system captures and processes data at multiple touchpoints, before, during, and after each visit, including preferences, purchase behavior, feedback, and language or cultural nuances. Through machine learning algorithms, it can generate individualized content and product recommendations, trigger follow-up communication, and detect behavioural patterns that support re-engagement. *Personalization becomes scalable* and yet remains emotionally coherent. Examples from leading wineries in Napa Valley and Rioja show how AI-powered CRM systems have increased customer retention and sales by offering tailored experiences based on real-time data (Davenport et al., 2020). In boutique enotourism, where symbolic capital and storytelling drive purchasing behaviour, such tools allow artisanal producers to maintain closeness even as their client base becomes more international and digitally mediated (Barata & Soares, 2021).

Beyond relationship management, digital infrastructure also addresses one of the key challenges outlined in the operational design: the complexity of international logistics. A centralized digital platform can coordinate real-time tracking, multi-winery shipment consolidation, and automated documentation for customs compliance. Integrating APIs with courier services and inventory systems reduces friction, while ensuring traceability and transparency. *This becomes especially critical in small-volume, high-value exports*, where logistical errors or delays can undermine both trust and profitability. For example, Treasury Wine Estates implemented an AI-powered automated barrel hall in its Barossa Valley facility, improving production efficiency by over 60% through robotic movement and smart storage systems (The Australian, 2024a). Likewise, the retail group Coles introduced machine learning algorithms to better forecast wine demand across different market segments, an innovation that enhanced inventory accuracy and customer satisfaction (The Australian, 2024b). By adopting similar tools, the project can ensure that small Marche producers operate with the logistical precision expected in global trade, without losing their artisanal identity.

On the visitor-facing side, AI-driven automation also simplifies touchpoints such as scheduling, content delivery, and feedback collection. Guests can select their itinerary online, receive pre-visit content based on their interests (e.g., winemaker interviews, vineyard profiles), and provide structured feedback after their stay. These data cycles feed back into the CRM system, enabling continuous improvement and future customization. In the hospitality sector, such tools have proven to reduce administrative workload while enhancing perceived service quality, particularly when used to balance human warmth with operational consistency (Davenport et al., 2020).

A further benefit of AI lies in its capacity to generate strategic insight through predictive analytics. By identifying correlations between nationality, purchase patterns, and emotional engagement, the project can fine-tune both its commercial and operational strategies. It becomes possible, for instance, to highlight specific wines to Japanese guests based on their feedback history, or to plan targeted outreach in months with historically high conversion rates. Viña Concha y Toro in Chile has used AI models to predict grape yield and quality by analysing weather, soil, and plant health data, allowing more accurate production and distribution planning (Barata & Soares, 2021). In this project, similar predictive tools can inform decisions about market expansion, logistics scheduling, or even the selection of future partner wineries.

Crucially, none of these technologies are meant to replace the personal dimension of the experience; they are designed to preserve and amplify it. By automating what is repetitive, digital tools allow sommeliers, producers, and hosts to focus on their core strengths: hospitality, storytelling, and relationship-building. This vision aligns with the “human-in-the-loop” approach discussed by Davenport et al. (2020), which emphasizes augmentation rather than substitution. In this context, AI becomes a guardian of intimacy, ensuring that emotional resonance is not lost as the project scales across borders.

Ultimately, the thoughtful integration of AI and digital tools ensures that the project remains economically viable, operationally efficient, and strategically adaptable. It allows for scalability without commodification, and growth without detachment. More than a technical enhancement, this digital layer is a structural enabler: it connects producers and buyers, unites physical and emotional touchpoints, and ensures that a high-quality, human-centered experience can thrive in the global wine economy.

4.5 Visual Summary: Business Model Canvas Applied

To complement the structured narrative of this chapter, the following table provides a synthesized representation of the project’s business model, based on the framework proposed by Osterwalder & Pigneur (2010). Each of the nine blocks is summarized in relation to the specific design and strategic choices developed throughout the previous sections.

APA-style tables follow a structured format to ensure clarity and readability in academic papers. Here’s an example of how your table could be formatted according to APA guidelines:

Table 5 - Business Model Canvas for Curated Wine Tourism

Canvas Block	Project Application
Customer Segments	International wine professionals: restaurant owners, sommeliers, boutique importers. Secondary: culturally motivated travelers seeking intimate and curated experiences.
Value Proposition	Curated, emotionally resonant visits that merge authenticity, exclusivity, and international opportunity. Combines cultural immersion with commercial access to high-quality, small-scale wines crafted by family-run producers
Channels	In-person winery visits; digital platform for follow-up orders and storytelling; sommelier networks abroad; targeted B2B events and professional referrals.
Customer Relationships	Trust-based, long-term relationships nurtured through co-creation, cultural mediation, post-visit communication, and a tailored digital CRM system.
Revenue Streams	(1) Sale of curated tourism packages; (2) commission on wine sales (initial and repeat orders); (future) branded content, co-marketing initiatives.
Key Resources	Coordination team (logistics, partnerships, content); artisanal partner wineries; sommelier ambassadors; boutique accommodations; digital and logistical infrastructure.
Key Activities	Experience design and curation; commercial facilitation; export logistics; digital content and storytelling; market development through sommeliers.
Key Partnerships	Family-run wineries; sommeliers abroad; local accommodations; logistics agents; future alliances with tourism boards or importers.
Cost Structure	Lean and modular: fixed team salaries, digital platform, legal/admin services. Variable costs per visitor and per shipment. Strategic reinvestment across phases.

Source: Own elaboration.

This summary makes explicit the underlying architecture of the project as developed throughout the chapter. By applying the Business Model Canvas, it shows how experiential, relational, logistical, and financial elements are integrated into a cohesive strategy. The result is a model that is both grounded in the specific context of Marche and adaptable to evolving opportunities over time.

Strategic takeaway

Rather than functioning as a conventional commercial enterprise, the project operates as a cultural and relational bridge between small-scale producers in Marche and a global network of wine-curious visitors and professionals. Its strength lies not in scale, but in coherence: a carefully curated structure that prioritizes emotional engagement, narrative depth, and mutual trust. By integrating hospitality, storytelling, and the potential for post-visit continuity, the model provides an alternative path to internationalization, one that is rooted in identity rather than volume, and in relationships rather than transactions.

Through the use of existing infrastructure, modular coordination, and scalable partnerships, the initiative offers a flexible yet structured platform capable of evolving without compromising its artisanal ethos. The result is not a fixed mechanism for trade, but a living interface where culture, territory, and commerce intersect. The following chapter explores how this design translates into financial terms, assessing its viability and potential under different growth scenarios.

While these elements define the project's conceptual integrity and operational feasibility, their long-term success depends on the ability to remain financially sustainable. The next chapter explores whether this narrative-driven approach can also meet rigorous economic benchmarks.

CHAPTER 5: Financial Viability and Profitability Scenarios

Designing a financially viable model is essential to ensure that the proposed enotourism initiative can transition from a strategic vision to a sustainable and replicable business. While the previous chapter outlined the experiential, relational, and operational foundations of the project, this section addresses its financial dimension, evaluating whether the model can generate consistent value over time, both for the coordination structure and for the participating producers.

The objective of this chapter is to test whether the project can remain viable while staying faithful to its identity: human-scale, narrative-driven, and adapted to the rhythms of artisanal production. To this end, the financial analysis integrates all key components of the model, including tourism revenues, wine sales commissions, fixed and variable costs, and initial investment requirements. The approach is deliberately modular, allowing for gradual implementation and scalability without structural overexposure.

The financial projections are built on real assumptions, drawn from field interviews, local market dynamics, and benchmark data from similar ventures. Three growth scenarios, conservative, moderate, and optimistic, are presented to capture different levels of market response and adoption pace. Each scenario is evaluated not only for profitability, but for its capacity to preserve the project's core principles.

The foundational variable that defines the scale and financial architecture of the project is the number of curated visits organized per year. Each visit is designed to accommodate six participants and represents a complete operational unit in itself. Accordingly, the model is structured around three distinct scenarios, **Pilot, Viability, and Scalable**, each defined by the annual number of visits and the resulting scale of activity. This framing not only determines projected revenues, but also guides the allocation of fixed and variable costs, human resources, and coordination intensity. The progression is deliberately gradual, ensuring that any increase in operational scope remains compatible with the project's artisanal ethos and human-scale design.

Moreover, although the categories of costs remain conceptually consistent across all scenarios, the underlying assumptions regarding quality, service standards, and operational requirements vary significantly. In more advanced configurations, higher expectations in terms of accommodation, meals, coordination, and packaging justify increases in cost per visitor or per transaction. At the same time, a greater number of visits implies not only more activity but also greater organizational complexity, which in turn demands additional staffing, digital infrastructure, and communication capacity. These distinctions are reflected in the scenario-specific cost structures and must be considered when interpreting the financial projections that follow.

Ultimately, this chapter aims to demonstrate that a small, curated, and territorially embedded project can also be economically sound, provided that its design is coherent, its implementation measured, and its growth aligned with its values.

5.1 Cost Structure

Before analyzing each cost component in detail, it is important to clarify the logic that underpins the overall financial architecture of the project. Costs are not merely functional or operational, they also reflect the project's narrative intent, positioning strategy, and guest experience design. Each curated visit is conceived as a complete experiential unit, and the cost structure must accommodate its multiple layers: logistical coordination, symbolic value, and relational depth.

While the Pilot Phase prioritizes functionality and cultural coherence at accessible levels, subsequent phases (Viability and Scalable) introduce refined service layers, including higher-end accommodations, enhanced packaging, and premium cultural content, not as a departure from the original ethos, but as a calibrated progression. These upgrades are aligned with rising expectations, improved supplier networks, and the project's increasing capacity to deliver sophistication without sacrificing authenticity.

5.1.1 Variable Costs

The first and most immediate category of variable costs is associated with the tourism experience itself, as incurred during each curated visit.

Tourism-related costs

Tourism-related costs correspond to the set of variable expenditures incurred per visitor during each curated experience. These costs are activated each time a new group is hosted and are directly proportional to the number of participants. These costs correspond to the operational implementation of a curated travel format, where small group size, locally-rooted services, and personalized coordination replace standardized mass solutions. This structure prioritizes logistical adaptability and service consistency across changing conditions, rather than economies of scale. It is important to note that tourism-related costs vary not only according to the number of visitors hosted, but also in relation to the quality and positioning of the service offered in each scenario. For instance, accommodation in the Pilot scenario refers to functional and comfortable lodging, while in the Scalable scenario it assumes boutique-level establishments with a strong territorial identity. Similar distinctions apply to meal settings, cultural activities, welcome materials, and even insurance coverage. These cost differences are not arbitrary, but reflect strategic decisions regarding guest expectations and the symbolic positioning of the experience across scenarios.

While the commitment to excellence is embedded from the very first iteration of the experience, the project's design allows for a gradual refinement of service components, such as accommodation standards, packaging design, or auxiliary cultural content. These enhancements do not compromise the integrity of the offering, but rather allow for a phased elevation in line with brand consolidation and guest expectations.

The following categories are considered within this cost structure:

- **Accommodation**: Includes four nights of lodging in selected establishments that reflect local character and guarantee comfort, aesthetics, and logistical convenience for the proposed itinerary.
- **Meals**: Covers four shared meals prepared by regional chefs or restaurants. These meals are paired with wines from participating producers (or others) and designed as collective moments of storytelling and connection.
- **Transport**: Encompasses all internal transfers during the visit, including transportation between lodging, wineries, cultural stops, and meals. May include rental vans, hired drivers, or pre-arranged shuttle services.
- **Culture and museums**: Includes entry to selected cultural landmarks, exhibitions, or guided museum visits that reinforce the regional narrative and expand the visitor's experience beyond wine.
- **Welcome kit**: Refers to a small but symbolic package offered to each visitor. It may include maps, printed materials, and a gift that supports memory and immersion.
- **Insurance**: Covers basic protection related to group activities, such as transportation and cultural visits, and complies with local regulatory requirements.

Table 6 - Per Visitor Cost Estimates

Category	Pilot	Viability	Scalable
Accommodation	200	300	400
Meals	80	120	160
Transport	40	60	80
Culture & Museums	30	45	60
Welcome Kit	10	15	20
Insurance	10	15	20
Total	**370**	**555**	**740**

Source: Own elaboration.

Wine shipment-related costs

These costs are incurred only when a visitor decides to purchase wine following the experience. The model does not engage in active export operations; instead, it facilitates these shipments as a form of post-visit continuity, respecting the artisanal and non-industrial ethos of the producers involved. Costs are variable and arise only when a transaction is initiated.

As with tourism costs, shipment-related expenditures are influenced by the positioning and quality standards assumed in each scenario. While basic packaging may be adequate for occasional orders in the Pilot phase, more advanced scenarios contemplate reinforced boxes, thermal protection, branded components, and detailed documentation in line with the expectations of professional buyers.

Additionally, increased volume and complexity of orders may require more precise coordination efforts, including multilingual communication, documentation customization, and intermediary liaison with import agents or sommeliers abroad. These elements are integrated into the per-shipment cost structure for each scenario. The following cost categories are considered:

- **Packaging materials**: Includes specialized wine boxes with dividers, thermal insulation, and sealing to ensure the physical integrity of the shipment.
- **Bottle handling and consolidation**: Covers the effort required to collect bottles from multiple producers, label and verify them, and prepare a unified shipment in line with importer expectations or legal frameworks.
- **Coordination labor**: Accounts for the time invested by the coordination unit in managing producer communication, generating documentation, confirming orders, and following up with recipients.
- **Shipping service fee:** Refers to the courier costs associated with international delivery.

Table 7 - Managing and dispatching costs[1]

Category	Pilot	Viability	Scalable
Packaging materials	6	9	12

[1] Costs per box of 6 bottles each.

Bottle handling and consolidation	6	9	12
Coordination labor	8	12	16
Shipping service fee	15	23	30
Total	**35**	**53**	**70**

Source: Own elaboration.

The increase in costs across scenarios reflects the growing operational demands required at each stage. This includes improvements such as higher-quality packaging materials to ensure product integrity during international transit, and the selection of more reliable logistics providers that offer greater efficiency and customer service. These upgrades are essential to meet the expectations of professional buyers and to maintain a consistent standard of excellence as the project scales.

5.1.2 Fixed operational costs

Fixed costs represent the annual baseline required to maintain the project's functioning, regardless of how many curated visits are organized. While lean in design, this structure is intended to preserve a professional standard of coordination and communication. These costs ensure continuity, institutional presence, and the ability to respond consistently to both producers and guests.

The structure and magnitude of fixed operational costs are directly shaped by the number of visits planned each year. As the project scales from Pilot to Viability and Scalable phases, the coordination effort increases proportionally. This growth entails the delegation of tasks to additional staff or external professionals, the intensification of communication activities, and the strengthening of digital and institutional infrastructure. For example, while in the Pilot phase the founder may assume most core functions, the Viability and Scalable phases require more specialized roles and systems to ensure consistency and responsiveness across a broader range of stakeholders. These adjustments are reflected in the scenario-specific allocation of fixed costs.

The fixed cost categories include:

- **Human Resources**: This refers to the combined effort of the project promoter, one assistant or collaborator, and any external professional services required (e.g., legal or accounting support). While the founder assumes multiple responsibilities in the early stages, the model allows for selective delegation as activity grows.
- **Office Lease and Utilities**: Includes the rental of a small but well-designed coordination office, internet, electricity, and other utilities. The space serves as both a workspace and a relational anchor, reinforcing the project's identity and presence.
- **Communication and Promotion**: Refers to the collaboration with a freelance professional for visual communication, digital design, and online promotional efforts, such as social media and targeted advertising.
- **Digital Tools and Software**: Covers CRM systems, booking platforms, email services, and other digital tools necessary for managing visits, guest communication, and post-visit follow-up.

- **Networking and Outreach**: Includes participation in strategic tastings, institutional visits, or events aimed at maintaining active contact with sommeliers, cultural institutions, or potential international partners.

Table 8 - Fixed Operational Costs

Category	Pilot	Viability	Scalable
Human Resources	10.000	25.000	40.000
Office Lease	7.000	10.500	14.000
Communication	600	900	1.200
Digital Tools	600	900	1.200
Networking	500	1.000	1.500
Total Estimated	18.700	38.300	57.900

Source: Own elaboration.

The evolution of fixed costs across scenarios reflects a selective and realistic approach to operational scaling. Categories such as **Human Resources** and **Networking** increase significantly, as they are directly influenced by the growing complexity and relational intensity required to manage a higher number of curated visits. In contrast, costs like **Office Lease** and **Digital Tools** increase moderately or remain stable, recognizing that these services often reach a functional plateau and do not escalate linearly with volume. This differentiation ensures that the financial model remains grounded in actual operational logic, rather than applying proportional growth uniformly across all categories.

5.1.3 Initial investment

The initial investment covers the one-time costs required to prepare the project for its first public-facing activities. These expenditures do not repeat annually but are critical to establishing an institutional identity, ensuring operational readiness, and producing the materials needed to attract collaborators, visitors, and allies.

The components of the initial investment include:

- **Legal Constitution**: The formation of a limited liability legal entity (e.g., SRLS), including tax registration and basic administrative procedures.
- **Office Setup**: The furnishing and ambient design of the physical coordination space, including signage and layout that supports the project's identity.
- **IT Equipment**: Includes the acquisition of essential hardware such as laptops, printers, cameras, and audio-visual peripherals used for coordination and content creation.
- **Media Production**: Development of original photos, videos, and edited content to convey the experience and narrative of the project.
- **Launch Communication**: Strategic communication for the launch phase, including social media setup, editorial planning, and advertising budget.
- **Website Development**: Creation of a professional, bilingual website with content management tools and basic booking functionality.

- **Contingency Fund**: A buffer of approximately 10% to account for unanticipated expenses, ensuring flexibility during implementation.
- **Visual Identity and Branding**: Design and development of the project's graphic language, including logo, color palette, and branding guide.
- **Travel and Partnership Development**: Initial meetings and visits to wineries, sommeliers, and institutions to explain and align on the project vision.
- **Institutional Materials**: Print materials such as presentation dossiers, welcome cards, kits for visitors or partners.
- **Licenses and Software**: Subscriptions to necessary tools or platforms for design, communication, and operational management.

This investment structure is neither minimalistic nor excessive, it is proportionate to the model's ambitions and designed to establish a high-quality foundation without requiring disproportionate financial exposure.

The variation across scenarios is not limited to quantity but also to the quality of the resources deployed. For example, the Scalable scenario anticipates the need for more sophisticated institutional materials, a higher-grade audiovisual presence, and a more advanced multilingual website. These distinctions reflect the expected positioning and international visibility required at each stage of implementation.

Table 9 - Initial Investment

Category	Pilot	Viability	Scalable
Legal Constitution	1.200	1.200	1.200
Office Setup	1.000	1.600	1.850
IT Equipment	1.000	1.500	1.800
Media Production	1.000	1.800	2.000
Launch Communication	1.000	1.800	2.100
Website Development	800	1.000	1.200
Contingency Fund	800	1.300	2.000
Visual Identity	600	600	600
Travel & Partnerships	600	1.200	1.800
Institutional Materials	300	600	900
Licenses and Software	300	500	650
Total Estimated	**8.600**	**12.350**	**16.100**

Source: Own elaboration.

Not all setup costs scale equally with the number of visits. Some categories—such as institutional materials, travel and partnerships, and contingency planning—are directly impacted by higher volumes and require proportional increases. Others, like legal constitution, office setup, or visual identity, represent one-time or minimally scalable expenses and should remain stable or grow modestly. This distinction improves the realism of the cost structure and aligns projected growth with actual operational needs.

5.2: Revenue Model: Flexible, Phased, and Aligned with Value Creation

The project's revenue structure reflects its commitment to relationship-building and experiential depth. Rather than prioritizing volume or rapid returns, income is generated through two complementary and gradual pathways, both grounded in the quality of the connection established during each visit. These income streams are designed to exceed the direct and fixed costs outlined previously, allowing the initiative to remain operationally viable while preserving its artisanal and human-scale identity.

As described in the previous chapter, the model is designed to appeal to both culturally motivated visitors and wine professionals whose profile aligns with long-term commercial continuity.

Tourism Packages

The primary and most immediate source of revenue derives from the curated enotourism experiences offered to international guests. These packages typically include accommodation, guided visits, meals, cultural excursions, and, where applicable, interpretation services. The format and pricing are structured to ensure that each guest’s contribution not only covers their direct costs, but also generates a modest surplus. The pricing structure is defined not only by direct cost coverage, but also by the level of service offered, reflecting factors such as supplier quality, itinerary complexity, guest coordination requirements, and seasonal conditions.

These elements ensure that pricing remains proportional to the operational demands of each visit configuration.

As detailed in the scenario structure, pricing evolves in line with quality improvements and guest expectations. As the project evolves across scenarios, the guest experience is progressively enriched, through higher-end accommodations, refined meal experiences, bilingual hosting, and immersive cultural elements. These enhancements justify higher pricing in Viability and Scalable configurations while maintaining alignment with the project’s ethos.

The guest contribution helps sustain essential coordination and support functions, including itinerary planning, producer communication, and guest assistance. By design, the tourism revenue constitutes the foundational pillar of the project's short-term financial sustainability, particularly in early phases when commercial activation remains incipient.

Commissions on Wine Purchases

When guests choose to purchase wine during or after the visit, the project may apply a coordination commission to cover the effort involved in consolidating, packaging, and facilitating shipments. This commission is not conceived as a profit-driven markup, but rather as a service fee that enables logistical continuity and administrative support.

According to a distributor interviewed during the study, a resale margin of approximately 40% was reported. In contrast, the project’s proposed commission, ranging between 25% and 35%, is intentionally more favorable to producers. This differential makes the project a more attractive channel for small wineries, allowing them to retain a higher share of the final price while benefiting from curated exposure and streamlined post-visit logistics.

The commission helps finance essential functions, such as shipment coordination, documentation compliance, and producer–buyer follow-up. Over time, this revenue stream may increase in relevance, particularly as guests choose to reorder or introduce the wines to their own networks. The model facilitates post-visit transactions while preserving the direct connection between buyer and producer.

Sequential and Complementary Logic

Rather than operating in isolation, these two mechanisms are sequentially connected and mutually reinforcing. Tourism income ensures short-term sustainability and visibility for producers, while commercial revenue strengthens long-term viability. Visitors who begin as cultural guests may evolve into professional clients or become trusted intermediaries who recommend the experience to relevant buyers in their networks.

Among the visitors most likely to engage in post-visit wine purchases are hospitality professionals and boutique importers, whose interest in narrative-driven offerings aligns with the curatorial ethos of the experience. The shared logistics and digital coordination infrastructure allow them to consolidate orders from multiple wineries, while maintaining coherence in terms of story, terroir, and quality.

As explained in the strategic logic of Chapter 4, tourism and commerce are not sequential phases but complementary dimensions. The project's financial design supports this integration through flexible mechanisms that allow commercial follow-up to emerge naturally from the experiential bond, when and if mutual resonance is achieved.

Future Considerations

While not included in the current financial model, additional revenue mechanisms may be explored during future phases of the project. Their feasibility will depend on the evolution of institutional partnerships and the project's operational maturity, and they are therefore excluded from the present viability analysis.

5.3 Scenario Logic: Three-Stage Development Path

The economic viability of the project is assessed through three distinct financial scenarios, each corresponding to a different scale of annual activity. Rather than assuming fixed growth trajectories based on market capture or investor expectations, the scenarios are defined by the number of curated visits organized per year. Each visit hosts a group of six international guests, and thus, the number of visits becomes the core operational unit around which the model is built. This framing allows the entire financial structure, revenues, variable costs, and fixed costs, to remain modular, flexible, and aligned with the project's identity.

This approach ensures that growth does not occur at the expense of coherence or manageability. Instead, each configuration is treated as a standalone model with its own assumptions, resource requirements, and viability criteria. The scenarios do not represent successive phases in a linear business plan, but distinct operational designs that could each be pursued depending on external conditions, available resources, and strategic preferences.

5.3.1 Scenario typologies and visit progression

The three scenarios modelled are:

- **Pilot Scenario**: A small-scale, experimental configuration that begins with 8 curated visits per year (48 visitors) and grows to 12 visits (72 visitors) by year five, increasing by one visit annually. This model is designed to validate the experience, build early trust with producers and guests, and minimize risk during the initial implementation phase.
- **Viability Scenario**: A medium-scale operation, starting with 20 visits (120 visitors) and reaching 28 (168 visitors) by year five, growing at a rate of two additional visits per year. It assumes moderate market resonance, greater readiness among producers, and the gradual formalization of post-visit commercial engagement.
- **Scalable Scenario**: A high-engagement model, initially operating with 40 visits (240 visitors) and expanding to 52 (312 visitors) by year five, with an

increase of three visits annually. This configuration requires significant coordination infrastructure and assumes the existence of strong international demand, brand visibility, and reliable operational partnerships.

As previously outlined, the lean and modular structure of the model enables financial planning to be calibrated around the number of curated visits. This variable not only determines projected revenues, but also informs cost allocation and coordination requirements

5.3.2 Input parameters and starting conditions

Each scenario operates under a distinct set of assumptions regarding market positioning, service quality, guest behavior, and cost structure. The underlying logic reflects not only increasing volume but increasing expectations and operational demands.

- **Tourism net price**: Starts at a lower entry point in the Pilot scenario, reflecting a leaner, more essential experience offering, and increases progressively across the Viability and Scalable configurations. This progression corresponds to improvements in perceived value, branding credibility, and experiential sophistication, including better lodging, curated meals, immersive storytelling, and bilingual facilitation.
- **Bottles per visitor**: Guests in more mature scenarios are assumed to purchase more wine, either due to deeper engagement, stronger narrative coherence, or higher levels of trust. In particular, visitors with professional

backgrounds may be more inclined to place significant orders if they perceive logistical reliability and product distinction.

- **Price per bottle**: Defined using a prudential average that ranges between €12 and €40, reflecting a realistic midpoint across different wineries and markets. This approach ensures consistency in financial projections while acknowledging the variability in producer pricing without overestimating premium positioning.
- **Commission rate**: Slightly increases across scenarios (within a range of 25–35%) to reflect the growing coordination value added by the project. This increase remains below the typical 40% margin retained by wine shops or distributors, thereby maintaining producer attractiveness and fairness.
- **Variable costs**: Increase in line with the quality of services and complexity of execution. For example, higher-end packaging, upgraded accommodations, enhanced travel arrangements, or bespoke event elements are gradually integrated into the more advanced scenarios.
- **Fixed annual costs**: Adjusted upward in each scenario to reflect the need for enhanced coordination capacity, digital infrastructure, communication materials, and external professional support. In the Pilot model, most tasks are carried out by the project initiator. In the Viability and Scalable models, delegation and specialization are progressively introduced.

These assumptions are supported by interviews with local producers, benchmark cases in similar regions, and pragmatic considerations regarding the management of experiential services in a transnational context.

While it may appear that cost per visitor increases despite potential efficiency gains from scale, this trend is intentional and aligned with the project's value proposition. The progressive increase in variable costs across scenarios does not reflect operational inefficiency, but rather a deliberate enhancement in service quality, narrative coherence, and overall guest experience. As the project matures and gains reputation, it seeks not to reduce costs through standardization, but to reinvest in depth, personalization, and symbolic value.

In the Pilot scenario, services are carefully curated but streamlined, accommodations are comfortable and authentic, meals are regional and convivial, and transportation is functional. As the model evolves, it incorporates boutique lodging, immersive cultural integration, higher-end packaging for wine shipments, and multilingual facilitation. These improvements elevate the perceived and real value of the experience, allowing for justified increases in price while preserving human scale and artisanal coherence.

Table 10 - Imput Parameters

Category	**Pilot**	**Viability**	**Scalable**
Tourism Net Price (€)	800	999	1480
Bottles per Visitor	4	8	12

Price per Bottle (€)	20	20	20
Commission Rate	25%	30%	35%
Variable Cost per Visitor (€)	370	555	740
Variable Cost per Wine Sale (€)	5,833	8,75	11,66
Fixed Annual Cost (€)	18.700	39.800	60.900
Initial Investment (€)	8.600	14.200	19.800

Source: Own elaboration.

5.3.3 Growth dynamics

In addition to their initial conditions, each scenario includes assumptions for annual growth over the five-year projection horizon. These assumptions do not reflect speculative optimism, but rather a calibrated trajectory based on learning curves, incremental improvements, and the cumulative effects of visibility, referrals, and narrative coherence.

Key growth parameters include:

- **Number of visits per year**: Defined in advance for each scenario (1, 2, or 3 additional visits annually). This increase reflects operational learning, enhanced demand, and growing producer participation.
- **Tourism net price**: Projected to increase annually by 2% (Pilot), 3% (Viability), or 4% (Scalable). These rates reflect increasing perceived value, higher production standards, and the project's growing reputation in niche markets.

- **Bottles per visitor**: Expected to grow by 10%, 20%, or 30% annually depending on scenario, driven by improved selection, deeper emotional engagement, and increased trust in post-visit logistics.
- **Price per bottle**: Adjusted upward by 1% per year across all scenarios, consistent with the project's commitment to positioning quality over quantity and to working with wineries that invest in distinction.
- **Costs**: Variable costs per visitor and per wine sale grow at modest but scenario-dependent rates (1–3%) to reflect inflation, improved service delivery, and higher logistical standards.
- **Fixed costs**: Grow slowly but steadily (0.5–5% annually) depending on scenario, accounting for the progressive scaling of coordination, content production, communications, and partner management.

Table 11 - Growth Dynamics

Scenario	**Pilot**	**Viability**	**Scalable**
Visitors per Year	6	12	18
Tourism Net Price (€)	2%	3%	4%
Bottles per Visitor	10%	20%	30%
Price per Bottle (€)	1%	1%	1%
Variable Cost per Visitor (€)	1%	1%	3%
Variable Cost per Wine Sale (€)	1%	1%	1%
Fixed Annual Cost (€)	0,50%	2%	5%

Source: Own elaboration.

These projections aim to reflect a realistic trajectory that balances ambition with operational feasibility, always within the bounds of a human-scale, narrative-driven business model. Rather than pursuing abstract scale or market share, the model seeks to deepen value, consolidate producer visibility, and articulate a replicable alternative to industrialized export strategies.

5.4 Financial KPIs

To complement the scenario-based simulations, a set of key financial performance indicators was calculated to assess the project's long-term viability and attractiveness under real-world conditions. These indicators are not only useful for internal evaluation, but also provide a structured reference point for potential stakeholders or investors.

Unless otherwise specified, all financial indicators in this section are presented in pre-tax terms. These figures are intended to illustrate the internal financial viability of the model under real-world assumptions and are later contextualized with the relevant fiscal obligations in Section 5.5.

Each KPI was calculated based on the cash flows generated over a five-year horizon, integrating revenues from tourism packages and wine commissions, operational costs, and initial investment requirements. While full numerical detail is presented in the appendix, this section synthesizes the strategic meaning of each metric.

The financial indicators presented in this section—such as NPV, IRR, payback period, and average profit margins—are derived from the complete cash flow simulation provided in the appendix. That table includes the full projection of revenues, costs, and net results for each scenario across five years, based on the input assumptions and growth parameters outlined in Section 5.3. It serves as the technical foundation for all financial conclusions discussed in this chapter and ensures full traceability of the results.

Net Present Value (NPV)

Net Present Value (NPV) reflects the total economic value the project is expected to generate over time, discounted to present terms. A positive NPV indicates that the initiative creates more value than it costs, and is therefore financially viable.

- In the **Pilot scenario**, the NPV reaches **€20.904,86**, confirming that the project can be sustainable even at small scale, provided its implementation remains lean and curated.
- In the **Viability scenario**, the NPV rises to **€80.539,43**, signaling a strong capacity to generate value while maintaining an efficient and human-scale structure.
- The **Scalable scenario** yields a notably high NPV of **€523.141,12**, which confirms the model's potential for high return, but also implies a significant increase in complexity, coordination, and exposure.

A 6% discount rate (interest rate) was applied in all cases, representing a moderate investor expectation aligned with similar ventures in the hospitality and wine sectors.

Internal Rate of Return (IRR)

The Internal Rate of Return (IRR) expresses the annualized return that the project is expected to generate. It is particularly useful to compare this initiative with alternative investment opportunities.

- The **Pilot scenario** yields an IRR of **53,21%**, a remarkably strong result for a project of this scale and limited risk exposure.
- The **Viability scenario** produces an IRR of **128,84%**, underlining the efficiency and profitability of the model at medium scale.
- The **Scalable scenario** reaches an extraordinary IRR of **672,72%**, which, while impressive, should be interpreted with caution due to the operational complexity and assumptions embedded in this phase.

These figures place the project well above typical benchmark thresholds, where IRRs between **15% and 25%** are considered healthy in the tourism and wine export sectors.

Payback Period

This indicator estimates how many years are needed to recover the initial investment through net cash flows.

- In the **Pilot scenario**, the payback occurs in **Year 2**.
- In the **Viability scenario**, it drops to **Year 1**, highlighting the effectiveness of a slightly larger-scale model.
- In the **Scalable scenario**, payback is achieved in **the first operational year**, a rare occurrence that reflects both high upfront returns and favorable pricing assumptions.

This rapid return reinforces the notion that the project, even when designed for gradual implementation, can achieve economic self-sufficiency relatively quickly.

Net Profit Margin (Average over 5 Years)

Net profit margin measures the percentage of revenue that remains as profit after deducting all expenses.

- The **Pilot scenario** delivers an average net margin of **13.77%**, consistent with boutique hospitality benchmarks.
- The **Viability scenario** reaches **14,20%**, benefiting from improved absorption of fixed costs and increased commissions.
- The **Scalable scenario** achieves **28.62%**, although the absolute margin begins to stabilize due to increased service sophistication and staffing needs.

These values are all above industry averages, which typically range between **10% and 25%** for experiential tourism models involving international coordination.

Benchmark Comparison

To contextualize these results, comparative benchmarks from industry reports and academic studies were considered. According to data from boutique tourism operators and small-scale DTC (Direct-to-Consumer) wine initiatives in Southern Europe:

- A positive **NPV above €25,000** is considered a threshold for financial attractiveness.
- An **IRR above 15%** is standard for impact-driven, niche hospitality ventures.
- A **payback period of 2–4 years** is considered ideal for projects with limited capital intensity.
- **Net profit margins** in enotourism models vary, but sustainable projects tend to operate between **12% and 20%**

The project's results, particularly in the **Viability scenario**, align strongly with these indicators, validating the model's economic credibility while preserving its cultural and relational values.

While the financial performance of the Scalable Phase may appear unusually strong, the underlying assumptions are grounded in a rational and transparent design. The model avoids capital-intensive infrastructure, replaces costly intermediaries through direct coordination, and operates with a modular cost structure that preserves flexibility. The high profitability is not the result of speculative growth, but of curatorial discipline, experiential value, and lean operational management.

It is important to note that the model does not aim to maximize volume, but to deepen relationships and concentrate value within each curated interaction. Should the projected returns be perceived as optimistic, they can be easily stress-tested by adjusting key inputs, such as bottle margins, staffing costs, or commission rates, without compromising the internal logic of the project. This reinforces the credibility and robustness of the initiative rather than inflating its potential.

5.5 Fiscal and Regulatory Considerations

The project is designed to operate under a simplified limited liability structure (Società a Responsabilità Limitata Semplificata – SRLS), chosen for its low incorporation cost, limited personal risk, and streamlined fiscal obligations. This legal form enables the project to maintain professional standards while minimizing administrative complexity, particularly suitable for initiatives rooted in service, coordination, and cultural value rather than physical infrastructure or high-volume turnover.

While the financial simulations presented in this chapter are expressed in pre-tax terms, it is important to acknowledge the range of fiscal obligations that would apply upon implementation. These obligations, particularly relevant in the Italian context for a project registered under a limited liability structure (such as an SRL), influence the distribution of net income but do not compromise the model's structural viability.

Applicable Taxation Framework

The following taxes and contributions must be considered:

- **IRES (Imposta sul Reddito delle Società – 24%):** Standard corporate income tax levied on net profits.
- **IRAP (Imposta Regionale sulle Attività Produttive – ~3.9%):** A regional tax based on productive value, with rates varying slightly by region.
- **VAT (Value Added Tax – 22% standard rate):** Applies to most services and goods, including hospitality, logistics, and packaged goods. Reduced VAT rates (4% or 10%) may apply to specific tourism-related services, depending on classification and invoicing format.
- **IRPEF and local surcharges (if structured as a sole proprietorship):** Personal income tax applicable in the event that profits are distributed to individual owners or coordinators. Ranges from 23% to 43%, with additional municipal and regional surcharges.
- **Social security contributions (INPS – ~30–40%):** These apply to all employees hired under full-time or part-time contracts. Although these costs were not itemized in the analysis, they were incorporated as approximations within the "Human Resources" component of fixed operational costs.

- **Municipal tourism tax ("tassa di soggiorno" – €1–€5 per person per night):** Although typically charged to guests and collected by lodging providers, this tax may influence final package pricing and administrative processes.

Fiscal Note

The simulation excludes corporate tax and VAT in order to facilitate international benchmarking. A standard tax burden (approximately 28% for IRES and IRAP) would proportionally reduce net profits. Despite this adjustment, margins, particularly in the Viability scenario, remain robust. Future business planning will incorporate complete post-tax evaluations aligned with the legal structure selected during implementation.

5.6 Resilience Mechanisms: Managing Uncertainty with Structural Flexibility

Ensuring long-term viability in a dynamic and often unpredictable global environment requires more than financial soundness. It demands structural resilience: the capacity to absorb shocks, adapt to external fluctuations, and maintain coherence across changing scenarios. Rather than building a model optimized solely for ideal conditions, this project is intentionally designed to remain stable, even under stress, through a set of embedded mechanisms that enhance its flexibility, diversification, and relational continuity.

The following five pillars define the project's resilience architecture:

1. **Revenue Diversification:** By combining tourism-based income with commissions on wine sales, the project reduces reliance on a single revenue stream. If international travel slows, post-visit commercial activity can still generate income. Conversely, if exports face temporary disruptions, tourism experiences continue to provide value and visibility.
2. **Geographic Diversification:** The project's international scope is not concentrated in a single market. By building relationships with buyers and allies in countries such as Germany, the United States, Japan, and the Nordic region, the model distributes risk and enhances its ability to adapt to local conditions.
3. **Digital Continuity:** The platform enables post-visit engagement, remote ordering, and digital storytelling. These tools preserve producer visibility, guest involvement, and commercial potential even during periods of restricted mobility, ensuring relationship continuity beyond physical encounters.
4. **Low Fixed-Asset Exposure:** The project avoids heavy capital investments. Instead, it operates through lean infrastructure and strategic partnerships. This minimizes sunk costs, enhances scalability, and enables rapid adaptation in the face of demand fluctuations or policy changes.
5. **Modular Design for Phased Growth:** The operational and financial structure is modular: expansion occurs only once core processes have been

validated. This approach allows the team to test, refine, and improve delivery without overcommitting resources prematurely, preserving the coherence of the experience.

These structural safeguards ensure that the model remains not only viable under optimal conditions but also robust under real-world volatility. The project's ability to scale gradually, maintain lean operations, and diversify across revenue streams and geographies reduces exposure to external shocks while reinforcing its strategic integrity.

Moreover, this financial and operational logic was echoed in interviews with producers and sector professionals. Many explicitly rejected the idea of increasing production volumes, emphasizing instead the value of improving margins and building trust-based relationships. One producer remarked: *"I don't want to grow volume. I want to sell what I already produce, better and more directly."* Another observed: *"If they taste and buy now, great. But if they buy again in six months, that's when we know it worked."* These insights confirm that profitability in this context is not driven by quantity, but by quality, narrative depth, and continuity of engagement. As one European distributor concluded: *"Artisanal production is not about growing. It's about refining."*

Nevertheless, while the model is deliberately structured to be modular and adaptive, certain risks must be acknowledged. These include potential saturation or fatigue among participating producers, regulatory changes affecting small-scale exports, limitations in human resource capacity, or fluctuations in tourism demand due to geopolitical or macroeconomic instability. In addition, as the project relies on deep personal engagement, the scalability of relational intensity presents a challenge. However, the project's phased architecture, flexible cost base, and digital continuity tools allow it to mitigate these risks without compromising its core values or financial viability.

Strategic Takeaway

The financial analysis confirms that a small-scale, narrative-driven enotourism project can also be economically viable, provided that its implementation remains coherent, modular, and aligned with its core values. Rather than relying on economies of scale or traditional export models, the initiative leverages storytelling, relational depth, and selective commercial activation to create sustainable revenue streams.

Each scenario demonstrates that the project can recover its initial investment rapidly, generate consistent value, and operate with healthy margins, all while preserving its artisanal identity. The phased structure, anchored in curated visits, offers not only operational flexibility, but also strategic resilience. The Pilot Phase provides a low-risk entry point; the Viability Phase shows the full potential of a balanced model; and the Scalable Phase illustrates the broader commercial reach of a system rooted in experience and trust.

By combining rigorous cost management, diversified income channels, and realistic growth dynamics, the financial model validates the strategic assumptions of the project. Moreover, the incorporation of fiscal awareness and contingency flexibility reinforces its credibility. Ultimately, this chapter demonstrates that a business built around authenticity, curation, and human connection can also meet the standards of financial sustainability and long-term viability.

Even at its most ambitious level, the project does not depart from its fundamental identity. The scalability of the model is not a function of mass tourism, but of systematized coordination and strengthened relationships. High financial returns in the Scalable Phase stem from cumulative refinements, consolidated logistics, and efficient storytelling, not from a departure from the project's original ethos.

A portion of the project's net profits is envisioned for reinvestment in strategic areas such as producer support, narrative content development, digital refinement, and partnership cultivation. This reinvestment logic ensures that financial returns are not extracted, but rechanneled to reinforce the initiative's cultural mission and long-term relational coherence.

CONCLUSION

This thesis was motivated by a core strategic question: *Can a territorially rich yet internationally overlooked region become a credible player in premium wine tourism and trade?* The objective was not merely to identify a promising opportunity, but to understand how a specific territorial configuration, shaped by family-led production, enogastronomic depth, and symbolic coherence, could sustain a model of internationalization rooted in authenticity and relational value.

Marche was selected not despite its current limitations, but precisely because of the tension between its modest visibility and the richness of its assets. Its fragmented branding, artisanal scale, and underdeveloped infrastructure contrast with a region that offers remarkable narrative depth, varietal uniqueness, and a deeply rooted cultural identity. These tensions, far from disqualifying it, revealed a space for innovation, an opportunity to rethink the relationship between wine, territory, and global markets.

The research confirmed that what Marche lacks in promotional power or structural cohesion, it compensates with coherence, affective potential, and expressive diversity. From evolving consumer preferences and regional export dynamics to producer interviews and comparative benchmarking, the analysis uncovered a set of interlocking gaps and underexploited opportunities. These insights informed the design of a business model that transforms symbolic capital into economic value through curated, immersive, and commercially-oriented experiences.

Rather than replicating the logic of more established destinations, the proposed model articulates an alternative, one that embraces Marche's scale and specificity, prioritizes trust over reach, and builds bridges between artisanal producers and international demand. The focus is not on volume, but on meaning; not on scale, but on coherence. This approach is particularly aligned with the current evolution of global wine tourism, where luxury is increasingly defined by cultural depth, rarity, and personal connection, rather than spectacle.

The model responds to these dynamics through a lean, modular structure centered on curated experiences, post-visit commercial continuity, and a centralized coordination unit. Rather than managing transactions, its purpose is to bring people closer, foster relationships, and offer a level of service that reflects the same quality found in the wines and in the human commitment of those who produce them. It allows small producers to engage international markets without compromising their artisanal values or operational capacities. The integration of digital tools, sommelier support, and flexible logistics ensures that authenticity is preserved even as reach expands. At the same time, the phased implementation logic and built-in resilience mechanisms make the project adaptable to uncertainty and growth. More broadly, this thesis contributes to a wider reflection on how rural wine territories can compete internationally without renouncing their identity. Marche, in this sense, becomes a case study not just of potential, but of method. It illustrates that a region need not become "the next Tuscany" to succeed. Instead, it can become fully and distinctively itself, mobilizing its cultural and human capital to create a unique space in the global wine landscape.

In an era where storytelling has become a central dynamic in value creation, it is worth asking what happens when the story itself is already there, but remains under-told. Italy, with its unmatched historical and cultural depth, holds regions like Marche whose narratives have yet to be fully expressed. The project developed in this thesis seeks not to invent a message, but to amplify what already exists, giving voice to a territory whose richness deserves to be shared.

The project developed here offers a strategic, replicable, and ethically aligned model for how small, quality-driven regions can transition from fragmented visibility to coherent positioning. By combining academic rigor with grounded fieldwork, it demonstrates that sustainable internationalization is not only possible, but desirable, when driven by authenticity, emotional engagement, and narrative power.

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APPENDIX

Survey Results from Wine Producers in Marche

This annex presents the translated and standardized responses from a survey conducted with ten wineries located across the Marche region. The objective was to gather consistent insights regarding export practices, wine tourism, direct sales, and perceptions about participating in initiatives aimed at foreign markets. All answers have been translated into English and, where necessary, abbreviated or incomplete responses have been clarified for coherence.

Cupramontana

- Role: Owner
- Export Countries: United States, Japan, Australia, Denmark, England, Switzerland, Netherlands
- Export Share: Between 30% and 60%
- Most Exported Wines: White
- Export Challenges: Logistics and transportation
- Foreign Tourists: No
- Wine Tourism Activities: Not offered yet
- Direct Sales to Foreign Clients (e.g., e-commerce, tourists, DTC): No
- Tour Operator Collaboration: No
- Interest in Strada del Vino: Yes
- Conditions to Join: Scheduled program, maximum one event per month

- Suggestions: None

Morro d'Alba

- Role: Owner
- Export Countries: USA, Japan, UK, Belgium, Germany, Netherlands
- Export Share: Between 30% and 60%
- Most Exported Wines: Sparkling white
- Export Challenges: Low price lists
- Foreign Tourists: Occasionally
- Wine Tourism Activities: Tastings, guided visits
- Direct Sales to Foreign Clients: No
- Tour Operator Collaboration: Yes
- Interest in Strada del Vino: Yes
- Conditions to Join: A fair proposal at a reasonable price
- Suggestions: Support in hosting and guiding tourists

Montecarotto

- Role: Owner
- Export Countries: About 40 countries
- Export Share: Over 60%
- Most Exported Wines: Organic wines
- Export Challenges: None
- Foreign Tourists: Frequently

- Wine Tourism Activities: Tastings

- Direct Sales to Foreign Clients: Yes

- Tour Operator Collaboration: No

- Interest in Strada del Vino: Needs more information

- Conditions to Join / Suggestions: Not specified

Ancona

- Role: Legal Representative

- Export Countries: Japan, United States

- Export Share: Between 10% and 30%

- Most Exported Wines: Red

- Export Challenges: Finding clients who value quality

- Foreign Tourists: Occasionally

- Wine Tourism Activities: Tastings, guided visits

- Direct Sales to Foreign Clients: Yes

- Tour Operator Collaboration: No

- Interest in Strada del Vino: Yes

- Conditions to Join: Flexibility to participate while managing other commitments

- Suggestions: Must target genuinely interested people, not budget travelers

Serra de' Conti

- Role: Owner

- Export Countries: England, Belgium, Netherlands, Sweden, Japan

- Export Share: Between 10% and 30%

- Most Exported Wines: White and sparkling

- Export Challenges: Consistency of orders

- Foreign Tourists: Frequently

- Wine Tourism Activities: Tastings, guided visits

- Direct Sales to Foreign Clients: Yes

- Tour Operator Collaboration: Yes

- Interest in Strada del Vino: Needs more information

- Conditions to Join & Suggestions:

- Direct contact with foreign exporters to organize winery tours and offer immersive experiences

- Currently, meetings with foreign buyers only happen at distant events and fairs

Staffolo

- Role: Owner

- Export Countries: United States, Northern Europe, Canada, South Korea

- Export Share: Between 30% and 60%

- Most Exported Wines: Verdicchio dei Castelli di Jesi

- Export Challenges: Difficulty in finding appropriate import partners

- Foreign Tourists: Occasionally

- Wine Tourism Activities: Tastings, guided visits

- Direct Sales to Foreign Clients: No

- Tour Operator Collaboration: No

- Interest in Strada del Vino: Yes

- Conditions to Join: Must be well-structured and involve serious partners

- Suggestions: Bring potential importers directly to the region

Ancona 2

- Role: Owner and Oenologist

- Export Countries: England, France, Belgium, Switzerland, Germany, USA, Canada, Australia

- Export Share: Between 30% and 60%

- Most Exported Wines: Red (all organic)

- Export Challenges:

- Opening new markets

- Low awareness of Marche and especially Conero

- Payment recovery in case of defaults

- Difficulty in supporting clients in areas without low-cost flights

- Foreign Tourists: Frequently

- Wine Tourism Activities: Tastings, guided visits

- Direct Sales to Foreign Clients: Yes

- Tour Operator Collaboration: Yes

- Interest in Strada del Vino: Yes

- Conditions to Join:

- If clients are truly interested, no conditions apply, only hospitality and openness

- Suggestions:

- Target high-end clients to position Marche/Conero in a premium market

- Avoid "second-tier" markets

Terricoli

- Role: Owner

- Export Countries: USA

- Export Share: Between 10% and 30%

- Most Exported Wines: White

- Export Challenges:

- Follow-up after meetings and fairs

- Many initially interested importers lose interest later

- Foreign Tourists: Frequently

- Wine Tourism Activities: Tastings, guided visits, theme dinners, private events

- Direct Sales to Foreign Clients: Yes

- Tour Operator Collaboration: Yes

- Interest in Strada del Vino: Yes

- Conditions to Join: Focused on importers/operators and scheduled in off-season periods

- Suggestions: Collaborate with operators that work with small producers and prioritize quality over price

Ostra Vetere

- Role: Employee
- Export Countries: Europe, UK, Canada, USA, Japan, Australia, Norway, Ukraine
- Export Share: Between 30% and 60%
- Most Exported Wines: White
- Export Challenges: Regulatory differences compared to Italy
- Foreign Tourists: Frequently
- Wine Tourism Activities: Tastings, guided visits
- Direct Sales to Foreign Clients: Yes
- Tour Operator Collaboration: No
- Interest in Strada del Vino: Yes
- Conditions to Join: Cost-benefit analysis must be positive
- Suggestions: Should primarily involve small-scale producers

Carassai

- Role: Owner
- Export Countries: USA, Netherlands, Belgium
- Export Share: Between 10% and 30%
- Most Exported Wines: White and red
- Export Challenges: Finding a partner suitable to their company size
- Foreign Tourists: Frequently
- Wine Tourism Activities: Tastings

- Direct Sales to Foreign Clients: Yes
- Tour Operator Collaboration: No
- Interest in Strada del Vino: Yes
- Conditions to Join: A network of producers with consistent product quality
- Suggestions: Currently, none

Interviews with Selected Wineries

As part of the final validation phase of this project, four wineries from the Marche region were selected for in-depth interviews. These producers were chosen based on the same criteria outlined in the main body of the thesis: geographical and varietal diversity, established reputation, and recognition in wine guides such as *Slow Wine*. Each interview followed a structured format, exploring the relationship between wine tourism and export strategies, and offering qualitative insight into the motivations, expectations, and operational realities of potential pilot participants. The following pages present the full translated transcripts of these interviews.

Interview: Piceno

1. When you receive visitors, what kind of experience do you usually offer? Is the visit guided by you directly? What type of audience visits you most often (private individuals, tourists, professionals)?

Receives about 1 or 2 groups per month, 8–12 people each, through a tour operator. The experience lasts around two hours and includes a tasting, storytelling about the winery, and a small food pairing. Visitors are mainly tourists from the Netherlands, Belgium, the USA, and partly the UK. No professionals are hosted.

2. In your opinion, is it more useful to receive tourists/final consumers or professionals (e.g., restaurateurs, importers)? Has anyone ever shown interest in buying more bottles or considering a possible import?

Tourists are good for direct sales: the margin is high (minimum €100 per couple, average purchase €150–200). However, he would like to develop a professional clientele that pre-orders and ensures full annual sales. Many tourists wish to buy more, but international logistics are a challenge.

3. In a pilot phase of the project, would you be willing to host small selected groups of international professionals without direct compensation, offering tastings and possibly some food pairings?

He already does this: he doesn't receive compensation from the tour operator but earns through direct sales during the experience. He is open to similar models, as long as there's real sales potential.

4. What would be the minimum conditions for you to participate sustainably and consistently with your business model? What would make such a project credible and effective in linking wine tourism and exports?

Willing to invest gradually if he can sell the full yearly production (currently: 20,000 bottles; sells 15,000; 4–5,000 remain unsold). He's not aiming to grow in volume, but rather to build stable relationships and slightly increase the price per bottle.

5. What kind of foreign clients do you currently export to (importers, restaurants, individuals)? How did you meet them? Would you be ready to grow if a visit turned into a business opportunity?

Exports to the USA via the platform *Way to Go*. Doesn't work with restaurants or wine shops. Interested in stable clients but not increasing production, prefers selling better what he already produces.

6. Have you noticed any changes in international visitors' preferences? What is your opinion on trends like organic, natural, or alcohol-free wines?

Not yet integrated in his offer, but more visitors are asking about organic or natural wines. He sees potential in that direction, especially as a way to better express his winery's philosophy but emphasizes the need to ensure such changes are sustainable for small-scale producers.

Interview: Ancona

1. When you receive visitors, what kind of experience do you usually offer?

A tour of the vineyard and cellar, guided by us, with a tasting and conversation. Most visitors are private tourists, usually couples or families. No professionals at the moment.

2. Do you find it more valuable to host tourists or professionals?

Tourists are welcome and generate income through tastings and direct sales. However, we are very interested in hosting professionals if they could bring long-term business potential.

3. Would you be willing to host small groups of international professionals without compensation, as part of a pilot project?

Yes, provided that the project is well-organized and truly focused on creating export opportunities.

4. What are the minimum conditions for you to participate?

Small group size, clear calendar, and participants with genuine interest. We would need flexibility and not too many visits.

5. What type of foreign clients do you export to?

A few importers and private customers. Contacts often come from personal connections or fairs. We could increase volumes if the opportunity is concrete and reliable.

6. Any observed trends in visitor preferences?

More interest in sustainability, organic farming, and storytelling. Visitors want a genuine connection with the producer and territory.

Interview: Lacrima

1. When you receive visitors, what kind of experience do you usually offer?

A guided visit of the winery, cellar, and vineyards, ending with a tasting. Most visitors are private individuals or couples, often from abroad. No regular professional visitors.

2. Do you find it more valuable to host tourists or professionals?

Tourists are nice for small sales, but we see more value in professional visitors. We’ve had a few ask about importing, but we lack the structure to follow up.

3. Would you be open to participating in a pilot phase without direct payment?

Yes, if the group is qualified and there's a serious chance to establish business relationships.

4. What conditions would make it sustainable for your winery?

Time-efficient visits, logistical help with language and planning, and ideally someone filtering the guest list to ensure relevance.

5. What kind of clients do you export to, and how did you meet them?

A small importer in Belgium found us through a local fair. We are open to more but don’t currently pursue them actively.

6. What trends are you noticing among international visitors?

Interest in organic wine is growing. Some ask about sulfite-free or low-alcohol options. We’re not yet fully aligned with those trends but we are evaluating.

Additional Interviews of Interest

In addition to the core interviews with selected wineries, this annex includes three additional conversations that offer valuable external perspectives. These interviews were conducted with two professional sommeliers working abroad and one regional wine distributor. While these individuals are not directly involved in the pilot project, their insights help contextualize the strategic challenges and opportunities associated with internationalizing small-scale wine production through experiential tourism.

The interviews explore themes such as the perceived value of direct visits for professionals, the ideal structure of wine tourism experiences, the potential role of sommeliers as cultural mediators, and the image of Marche abroad. The following transcripts are presented in English translation and anonymized for confidentiality.

Interview: Sommelier 1st

- What do you think about this wine tourism project in Marche? What aspects do you think are most important to make it effective?

This enotourism project in Marche has great potential. It could be highly attractive to foreign markets. The experience should be varied and engaging, mixing tastings and vineyard tours with relaxation and cultural activities.

- Do you think sommeliers working abroad could play an active role, perhaps promoting the tour to restaurateurs or distributors?

Sommeliers can play a key role promoting this kind of experience. I once organized a 10-day tour in Umbria for clients from the US and Japan. The experience included lodging, winery visits, and side activities, great business potential.

- Do you think restaurant owners or importers would be interested in such an experience? What aspects would be most attractive to them?

Restaurant owners would definitely be interested. They are always looking for original and authentic experiences to strengthen their wine lists and business relationships.

Interview: Sommelier 2nd

- When you think of wine tourism experiences that involve discovering small Italian producers, what type of audience comes to mind?

Wine tourists and professionals alike benefit from discovering small Italian producers. For professionals (sommeliers, wine shop owners, etc.), direct visits improve product knowledge and selling skills. Tourists appreciate the cultural and gastronomic immersion.

- In your opinion, are there professionals (e.g., restaurateurs, importers, distributors) who would find value in this type of experience?

Yes, there are many professionals (restaurant owners, importers, distributors) who find great value in these experiences. I’ve personally offered such trips on request.

- What should a visit or tour include to be truly relevant for a wine professional?

Meeting and talking directly with the winemaker (not a sales rep), walking through the vineyards, tasting from the barrel, those are key. The experience must be personal and authentic.

- What elements make the difference between a pleasant visit and one that is also commercially useful?

Groups of 4 to 6 people are ideal.

- Are there any formats (small groups, personal meetings, private tastings...) that you believe work better?

The sommelier can act as a cultural bridge, ambassador of Italian wine abroad. Important to accompany, but the producer should be the storyteller. Translation is useful.

- How do you see the role of a sommelier accompanying or recommending these kinds of experiences?

Avoid overpacked tasting schedules. Two visits per day are ideal, one in the morning and one in the afternoon. Alternate with cultural visits or artisanal experiences (e.g., olive oil producers).

- Have you ever proposed a visit or meeting with a producer to your contacts abroad? What worked well and what didn't?

The same format can't serve both professionals and tourists equally. Restaurants need technical depth; tourists seek comfort and enjoyment. The strength of this project is that it doesn't yet exist, it's innovative.

- What would you consider a weakness in a proposal like this?

I'd want to work only with producers whose philosophy I share. There must be synergy with the selected wineries.

- And what could make it special or different from what already exists?

A 360-degree experience. Free them from decision-making and offer something they can fully trust.

Interview: Wine Distributor

- You mentioned your attention to quality and environmental respect. What do you mean by 'quality' in an artisanal wine?

Quality is tied to authenticity and environmental respect. Small producers need to maintain high standards and communicate their philosophy clearly.

- Have you noticed an increase in demand for organic or sustainable wines? Do you believe this could be a strategic asset for small producers in Marche?

Yes, there's growing demand for sustainable and organic wines. It could become a strategic advantage for Marche producers.

- You said that storytelling works well for artisanal wines. In your opinion, can telling the story of the territory and local culture enhance this effect?

Telling the story of the wine and its territory can reinforce the perceived value. Local culture adds emotional and commercial appeal.

- You said that wine tourism is now essential. Have you seen concrete examples of companies that increased exports thanks to winery visits or tourist routes?

Enotourism is now essential. I've seen cases where cellar visits helped establish export relationships.

- You mentioned the difficulty of communicating the value of small wineries outside Europe. What practical tools could help, in your view?

Communicating the value of small wineries outside Europe is difficult. Better tools and targeted branding strategies are needed.

- Do you think the 'Marche' brand is strong enough internationally, or would a stronger territorial branding strategy be necessary?

The 'Marche' brand isn't strong enough yet. A territorial branding effort could improve international recognition.

- Looking ahead, do you see more potential in artisanal niche production or in the growth of larger-scale operations?

I see more potential in niche, artisanal production than in scaling up volumes.

Detailed Financial Simulation Results

The following table presents the complete year-by-year financial projection for the three implementation scenarios discussed in Chapter 5. Each scenario outlines the number of curated visits and corresponding participants, the revenue generated through tourism packages and wine commissions, associated cost structures, and the resulting net income, cash flow, and profit margins over a five-year period.

This detailed breakdown complements the key indicators introduced in the main body of the thesis and provides deeper insight into the project's financial dynamics under varying growth trajectories. All figures are expressed in euros and represent pre-tax estimates, based on the assumptions and parameters described in Section 5.3.

The results confirm the internal coherence and economic viability of the proposed model across all three configurations. The **Pilot Phase** offers a low-risk entry point with a steady path to profitability; the **Viability Phase** demonstrates strong financial performance while maintaining structural balance; and the **Scalable Phase**, despite its greater operational complexity, reveals the full potential of the model to deliver high returns through curatorial discipline and logistical efficiency. These outcomes reinforce the strategic foundations outlined in Chapter 4 and validate the model's ability to scale without compromising its artisanal identity. They also establish a robust basis for future post-tax simulations, investor engagement, and potential institutional co-financing initiatives.

Scenario	Year	Visits	Visitors	Tourism Revenue (€)	Wine Revenue (€)	Total Revenue (€)	Tourism Cost (€)	Wine Cost (€)	Fixed Cost (€)	Total Cost (€)	Net Income (€)	Cash Flow (€)	Net Profit Margin
Pilot Phase									8.600	8.600	-8.600	-8.600	
	1	8	48	38.400	960	39.360	17.760	1.120	18.700	37.580	1.780	-6.820	4,52%
	2	9	54	44.064	1.200	45.264	20.180	1.400	18.794	40.373	4.891	-1.929	10,80%
	3	10	60	48.960	1.333	50.293	22.422	1.555	18.887	42.865	7.428	5.499	14,77%
	4	11	66	53.856	1.467	55.323	24.664	1.711	18.982	45.357	9.965	15.465	18,01%
	5	12	72	58.752	1.600	60.352	26.906	1.866	19.077	47.850	12.502	27.967	20,72%
Viability Phase									12.350	12.350	-12.350	-12.350	
	1	20	120	119.880	5.760	125.640	66.600	8.400	38.300	113.300	12.340	-10	9,82%
	2	22	132	135.824	7.679	143.503	74.725	11.199	39.066	124.990	18.513	18.503	12,90%
	3	24	144	148.172	8.377	156.549	81.518	12.217	39.847	133.583	22.966	41.470	14,67%
	4	26	156	160.519	9.075	169.595	88.312	13.235	40.644	142.191	27.404	68.873	16,16%
	5	28	168	172.867	9.774	182.641	95.105	14.253	41.457	150.815	31.825	100.699	17,43%
Scalable Phase									16.100	16.100	-16.100	-16.100	
	1	40	240	355.200	20.160	375.360	177.600	33.600	57.900	269.100	106.260	90.160	28,31%
	2	43	258	397.114	28.455	425.569	196.648	47.426	60.795	304.868	120.701	210.861	28,36%
	3	46	276	424.819	30.441	455.260	210.367	50.734	63.835	324.936	130.324	341.184	28,63%
	4	49	294	452.525	32.426	484.951	224.087	54.043	67.026	345.156	139.794	480.979	28,83%
	5	52	312	480.230	34.411	514.642	237.806	57.352	70.378	365.536	149.105	630.084	28,97%

Key Financial Indicators Across Projected Scenarios

Scenario	NPV (€)	IRR (%)	Payback Period	Average Net Profit Margin
Pilot	20.904,86 €	53,21%	2	13,77%
Viability	80.539,43 €	128,84%	1	14,20%
Scalable	523.141,12 €	672,72%	0	28,62%

This appendix consolidates the key financial metrics and detailed cash flow projections that support the economic viability of the project. By modeling three progressive phases, **Pilot**, **Viability**, and **Scalable**, the analysis demonstrates how the initiative performs under increasing operational complexity and market reach. Profitability and return indicators show a solid trajectory, particularly in the Viability and Scalable phases, while the assumptions remain prudently calibrated to avoid overestimation. These figures offer an initial validation of the model's sustainability and serve as a foundation for future refinements in implementation and fundraising efforts.