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Branding Spain as a top enotourist destination – Assessment of the resources and promotional activities

Abstract: The paper defines the meaning and scope of the term enotourism by presenting various related aspects. It also describes the status of contemporary enotourism in Spain overviewing enotourist offers of the regions. Their further growth is considered to lie in raising the quality of the enotourist regions’ offers and implementing the sustainable development as well as in purposeful branding that will contribute to the establishment of a brand related to enotourism in Spain. Using the method of diagnostic survey, the Poles’ (n = 150) awareness of the enotourism meaning was determined, along with their knowledge of enoregions in Spain and preferences when it comes to wine consumption. It was also assessed whether Spain is branded as the top enotourism destination.

Keywords: wine tourism, enotourism, cultural tourism, Spain, wine roads, wine, enoheritage, branding

1. Introduction

Food and drink, including wine, are an integral part of a local community’s history and culture, shaped for generations. Nowadays, local food and food related customs increasingly attract tourists from other countries and cultures (Czarniecka-Skubina and Nowak, 2008). Informed interest in characteristic food and products of a region, visiting food production sites, participation in food festivals, visiting and tasting typical regional products and meals are all clearly on the rise. Currently food takes on a new role related to social, cultural and entertainment demands, and becomes one of the main reasons for travel (Murgado, 2013). This is confirmed by numerous studies, e.g. M. Woźniczko et al. (2015), according to which 75% of the Polish tourists take into consideration the outstanding flavours of food when choosing a trip destination. As many as 60% of the respondents wish to taste the regional cuisine, 50% take the opportunity to purchase local products and food, 74% are inclined to take a longer route to enjoy a meal at a unique venue. As many as 67% of tourists bring culinary souvenirs back home. Food has become the essence of a destination’s identity and a full blown tourist attraction (Long, 2003; Boniface, 2003). From a regional perspective, agriculture and food have become an extremely important new driving force for tourism industry (Murgado, 2013).

The growing interest in wine tourism (also referred to as enotourism; oinos – wine in Greek) has been observed in many countries since the 1990s (Widawski, 2011 after Thaveni, 1996). It is becoming fashionable and one of the fastest growing tourist industries (Kruczek, 2009; Dubińska, 2013; Poczta and Różycka, 2012). The number of tourists choosing wine regions as their trip destinations is constantly growing. The most popular enotourist destinations are wine countries of the Old World: France, Italy, Spain, Portugal, Greece, Germany, all of whom are nations with rich vine growing tradition. Wine is part of their consumption culture. The map of wine desti-
nations now also includes regions of the New World – non-European countries: Australia, USA, Chile, Argentina, South Africa, Canada (Durydiwka, 2013; Rekowski, 2013). However, traditional wine destinations continue to play the vital part in enotourism. The world leader is France, with 8 to 10 million enotourists per year (Dubińska, 2013). Already 20 years ago, more than 20% of wines in the Burgundy region were sold directly to tourists from the cellar doors (Frochot, 2000). According to a 2010 study conducted by the tourism development agency Atout France (http://atout-france.fr/), 7.5 million people a year tour the country’s wineries, including 2.5 million foreign visitors. Foreign visitors of Italian wineries are estimated at between 4 and 6 million per year with an annual rise of 3.6% (Cinelli Colombini, 2015). In 2016, the Napa Valley welcomed a total of 3.5 million visitors, including 79.2% from the United States and 20.8% were international visitors. One third of them stayed overnight (www.visitnapavalley.com/about-us/research/).

In 2014, Spain was visited by nearly 65 million international tourists. According to the International Organisation of Vine and Wine (OIV), however, only 2% of them came to Spain with enotourism in mind (Rząca, 2017). At present, when many countries and regions are competing to create a new offer, to enhance the regional tourist product, to build the solid background around the product’s core, branding could be the key to success – the process involved in creating a unique name and image for a product in the consumers’ minds (mainly through advertising campaigns with a consistent theme). Branding aims to establish a significant and differentiated presence in the market that attracts and retains loyal customers (http://www.businessdictionary.com/definition/branding.html). Therefore, it is necessary and expedient to intensify activities leading to branding Spain as a top enotourism destination.

2. The objective and methodology of this study

The objective of this paper is to present certain aspects of enotourism in Spain based on the characteristics of basic elements of the enotourism product and the assessment of the resources and activities for branding Spain as the top enotourist destination. The level of Poles’ knowledge about enotourism and wine regions in Spain has also been checked in order to assess whether the image of Spain is associated with wine. For it seems that despite the potential of its natural and cultural heritage, based on which the wine-growing culture has developed, and the huge potential related to the number of tourists visiting the country, Spain still does not have a well-established enotourism brand. An extremely important factor in the development of enotourism in Spain seems to be the conscious building of a brand, the so-called branding.

The study uses a research technique consisting in analysing the data available from the existing sources, especially scientific papers and websites. They have been used to explain the terminology related to wine tourism and to describe Spain in terms of enotourism. An important part of the study were the surveys aimed at assessing the respondents’ knowledge of enotourism and wine regions in Spain.

The survey was conducted in autumn 2016 in the city of Toruń with 150 respondents selected randomly. The respondents answered the questions in person or via an online questionnaire. The questionnaire contained questions related to the consumption of grape wine and the knowledge of respondents about wine regions in Spain as well as their interest in enotourism.

3. Specific traits of wine tourism

Wine tourism (also referred to as enotourism, enology tourism) and culinary tourism are understood as part of cultural tourism. Food products and dishes specific to individual regions and countries, especially those “traditional” and “regional” ones constitute the
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An important part of enotourism are trips along wine routes, considered the most interesting thematic routes of all (Widawski, 2011), as well as participation in events related to winemaking (fairs, presentations, shows, winemaking celebrations) and wine festivals (Kowalczyk, 2003).

Wine tourism is evolving in various aspects and contexts, but the key to the sustainable development of wine tourism is the implementation of sustainable development principles in the regions, which are expressed in the care for natural and cultural environment of the enotourist region, its local community and in the presence of fully aware enotourists (Widawski and Oleśniewicz, 2014; Ruiz Romero De La Cruz et al., 2017). Greater emphasis should be placed by wine tourism destinations decision makers on protecting winescapes, encouraging unique and genuine forms of development, and focusing imagery projection on those elements of the enodestination experience which are of key importance for wine tourists (Williams, 2001).

The first studies in the field of wine tourism in Spain were approached by foreign authors and focused mainly on La Rioja (Gilbert, 1992; Hall and Mitchell, 2000) and on Marco de Jerez (Hall and Mitchell, 2000). These first studies were later completed by researches carried out mainly by Spanish researchers. In this sense, and among these pioneering studies carried out by Spanish researchers in this field, the contribution made by L.V.E Pastor (2006), who conducted the research in the scientific field of wine tourism in Spain, stands out.

In Poland among other types of cultural tourism E. Malchrowicz (2009) presented also a short overview of wine and food tourism opportunities on the Iberian Peninsula.

4. Spain as an enotourism destination

In Spain, as in France and Portugal, the vine growing tradition goes as far back as the 4th century BC (Dubinska, 2013 quoting: Girard-Lagorce, 2005). Spain is a region historically anchored in the wine culture and considered one of the most important ones in the enological market (Widawski, 2011). In the wine year of 2014/2015, the area of vine growing in Spain amounts to 958,696 ha and is the largest in the world. However, with a wine production of 42 million hectolitres (in 2015-2016), it ranks 3rd to Italy (51.5 m hl) and France (47.9 m hl)
The size of wineries in Spain considerably varies from region to region. Nearly 48% of the wineries are located in the region of Castilla la Mancha. While the vineyards of the Spanish region of Rioja (best known in the world) accounts for only 4.5% of the total area of the country’s vineyards (Rekowski, 2013).

The basis for the development of enotourism are wineries with a comprehensive offer, including wine museums, hotels, eno- and vinotecas and certified wine (Widawski, 2011). The number of Spanish vineyards amounts to approximately 10,000 covering 69 appellations. More than 4,000 vintners produce wine and grow over 90 varieties of grapes. The largest area (22.9%) is occupied by Airen (white) and Temporalillo (red) – 21.36% (Fig. 1).

Figure 1. Main wine varieties cultivated in Spain – Crop area (in ha) (Source: www.mapama.gob.es/es/estadistica/temas/estadisticas-agrarias/agricultura/encuestas-de-vine-do/, modified)

Spanish wine laws created the Denominación de Origen (DO) system in 1932 and were later revised in 1970, 1998 and 2003. Spanish wine categories for quality wines are as follows:
- Denominación de Origen, or DO is comparable to France’s AOC (Appellation d’Origine Contrôlée), and all DOs have regulatory bodies, Consejos Reguladores, responsible for creating the definition of each DO;
- Denominación de Origen Calificada, or DOC – the national committee determines which DOs deserve the DOC status, presently held only by Rioja and Priorat;
- Vino de Pago, or VP – this is a single estate wine. The wine from a DO Pago must be wholly created and bottled within that domain. Presently there are 14 DO Pagos (http://winesfromspainusa.com/).

The quality wine accounts for approximately 35% of the total wine production in Spain. DO quality wine crop areas make up 60% of the total area of vineyards in Spain and cover 592,000 ha (Rekowski, 2013).

The best known wine region in Spain is the province of Rioja on the Ebro River (Kruczek, 2009), the wine quality leader (Fig. 2). The largest wine region, both in terms of vineyard area and the volume of wine production, is Castilla la Mancha, whose vineyards account for ca. 50% of the total vineyard area in Spain. Other worth mentioning well-known regions include Priorat, Penedes and Ribera del Duero (Fig. 2), producing wine of quality and prestige equal to the best of Rioja wines (Kruczek, 2009; Rekowski, 2013). The Spanish-Portuguese region of Duero, called the “wine-bearing river”, has been added to the UNESCO World Heritage List in 2001. This distinction is all the more relevant as only seven other wine regions of the world are listed as UNESCO World Heritage: The Climats, terroirs of Burgundy and Champagne Hillsides, Houses and Cellars in France, Vineyard Landscape of Piedmont: Langhe-Roero and Monferrato in Italy, Tokaj Wine Region Historic Cultural Landscape in Hungary, Lavaux, Vineyard Terraces in Switzerland and Landscape of the Pico Island Vineyard Culture and Alto Douro Wine Region in Portugal - http://whc.unesco.org/en/list).

Andalusia is, above all, the region of the famous Jerez-Xérès-Sherry wines, the unique Manzanilla white wines, the heavy sweet Malaga wines – DO Málaga and Sierra de Málaga and the sweet DO Montilla-Moriles wines. Catalonia produces, among others, the sparkling wines (Cava) and the strong Penedes wines. Cava, similar to champagne in France, is a sparkling wine produced using the method...
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The Catalan vintners have officially adopted this name in 1970 in order to distinguish their product from the French champagne. Valencia, on the other hand, is home to Sangria – the traditional Spanish alcoholic beverage, well known in Poland, made of wine with fruit and fruit juices, served with ice and other additional ingredients (Chrzczonowicz, 2013).

There are 26 wine routes in Spain (Fig. 3). Each of them provides the tourists with a number of attractions: visiting vineyards, wine cellars, tasting local wine and regional food, accommodation in stylish, traditional vineyards, exploring the culture and lifestyle of traditional wine areas (http://spain.info/en/que-quieres/gastronomia/rutas-vino/).

The vineyards along the Spanish wine routes have registered a total number of 2,242,968 tourists in 2015. It was found that the most frequent enotourist visits take place in October (284,659 visits) and September (243,884 visits), followed by May (231,761 visits) and April (229,024 visits). The intensity of visits decreases in the winter months, i.e. from November to February. It was also observed that the number of enotourist visits to wineries and wine museums increased in the period from 2013 to 2015 (Fig. 4) (http://wineroutesofspain.com/bd/archivos/archivo553.pdf).

Figure 2. Spanish wine regions and appellations
(Source: http://winefolly.com/wp-content/uploads/2013/02/Spain-Wine-Map-2016-WineFolly.jpg#large)

Figure 3. Wine routes of Spain
(Source: www.wineroutesofspain.com/guiavirtual/pdf/Guia_RVE.pdf)
The most popular wine routes in Spain are Penedes (Catalonia) and Jerez (Andalusia), which is reflected in the annual report of the Spanish Association of Wine Cities (La Asociación Española de Ciudades del Vino – ACEVIN). The Wine and Cava del Penedes Enoturisme Route was visited by 464,825 tourists in 2015, whereas the Wine and Brandy de Jerez Route – by 449,326 tourists. They are followed by the Ribera del Duero Route (269,909), Rioja Alta (264,591) and Rioja Alavesa (150,992 visitors). The popularity of the above-mentioned routes has been enhanced by their convenient location in areas with a high tourist activity, as well as the proximity to the seaside and beautiful cities such as Barcelona and Seville, along with the region’s (Rioja) recognisability and the inscription on the UNESCO list (http://wineroutestoSpain.com/bd/archivos/archivo687.pdf). The La Rioja Alavesa wine route offers the opportunity to enjoy avant-garde art in the form of artistic installations designed by the most famous architects, for example the Ysios winery designed by Santiago Calatrava (Fig. 5A), fully integrated into the landscape and described by the author as the ongoing dialogue between the construction and nature (http://www.clubysios.com/ysios) and the City of Wine (Fig. 5B), designed by Frank O. Gehry for the Marques de Riscal vineyard (www.marquesderiscal.com/).

The least popular routes include Yecla, Cigales and Txakoli, only 3,580, 4,931 and 5,679 visitors respectively.

A very important, complementary part of the enotourism offer in Spain are wine museums, founded as a result of the growing interest in enotourism and increased needs of tourists to learn about the traditions of winemaking. Already 27 museums are members of The Association of Wine Museums of Spain (Asociación de Museos del Vino de España) (Widawski, 2011; www.museosdelvino.es/) founded in 2005 and dedicated to maintaining the cultural and historical enoheritage, both tangible and intangible.

Museums offer an edutainment experience on the winemaking culture, production processes and history of Spanish wines. The Association is organizing numerous events including Annual Congresses dedicated to various aspects of the wine culture. The 2017 meeting (15th) was organized by Museo del Vino Pagos del Rey S.L. in Morales del Toro in DO Toro (Fig. 6C and E; www.dotoro.com/en/), a town surrounded by vineyards (Fig. 6A and B), located in the province of Zamora. The event took place at the turn of May and June under the title “Communication and marketing of wine culture” (Fig. 6D).

The smooth growth of enotourism in the regions, including the organisation and operation of wine routes, involves various business

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1 Part of the French company Pernod Ricard, which also owes Wyborowa and Luksusowa vodka trademarks.
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and public entities, such as wine producers, public authorities, accommodation providers, restaurant owners, tour operators and travel agents, companies distributing auxiliary articles for the development of wine tourism and businesses providing supplementary services (Kowalczyk, 2003). Collaboration between the local institutions and the industry of some of the existing ten DOs in the archipelago of Canary Islands led to the implementation of

**Figure 5.** Avant-garde wine cellar architecture: Ysios (A) and Marques de Riscal (B) wineries (Sources: A - www.nikoskokkas.com; B - http://de-gustibus-non-est-disputandum.blogspot.com)

**Figure 6.** Vineyards in Morales del Toro (A and B); banner and logo of DO Toro (C); poster of the 15th annual congress of Asociación de Museos del Vino de España; map of DO Toro (E) (Sources: A and B - photo by P. Charzyński; C-E - http://www.dotoro.com/en/)
strategies aimed at maximising the potential of local wine production, and preserving the local centuries-old vine growing and wine making tradition. Of the many actions undertaken, the establishment of the *Insular Fair of La Palma Wines* (FIVIPAL) in 2008 can lead to significant benefits from the existing large contingent of tourists (Alonso and Bressan, 2014).

Spain is an example of a country that introduces principles of sustainable development in order to preserve its broadly defined national heritage related to the vine growing culture. With this in mind, *the Spanish Association of Wine Cities* (ACEVIN) was founded in the mid-1990s, which as of June 2017 had 88 members including towns, communities and organisations related to wine. The objective of the association is to optimise the benefits from the enoheritage of the region and to integrate the European winemaking environment. As a consequence, the design and methodology was developed in 1994 to establish different wine routes (López-Guzmán et al., 2013).

ACEVIN is a member of the *European Network of Wine Cities* (RECEVIN – Red Europ de Ciudades del Vino) created in 2000, which aims at lobbying the European institutions for the development of wine regions, exchanging knowledge and experience, helping to create development programs for wine regions and promoting enotourism in Europe by implementing initiatives such as: *The European Charter on Oenotourism* (RECEVIN, 2006), *Vintur* (2004-2006), *European Day of Wine Tourism* (since 2009), *European Wine City* (established in 2012) (www.recevin.net; Widawski and Oleśniewicz, 2014).

It is worth mentioning that enotourist stays in Spain can be made even more attractive by combining them with other forms of culinary tourism based on traditional Spanish products such as olive oil tourism (oleotourism), including visits to olive groves and olive mills, olive oil tasting sessions, tasting typical local food with olive oil as the main ingredient (Murgado, 2013). It is important to note that various culinary fairs, contests and festivals are being organized in numerous Spanish communities. Such events take place e.g. in 50% of municipalities of Cantabria, 70% of Navarra, 60% of La Rioja and 82% of those in Asturia (Feo Parrondo, 2005; 2006; 2007; 2009).

### 5. Knowledge of Polish people about enotourism and Spanish wines

Culinary and enotourists have a lot in common (Gaworecki, 2007). Statistically, they mostly hold a university diploma, earn more than the average and usually travel together with family or friends. These are the tourists interested in exploring new flavours of food and wine, looking for new interesting culinary and wine tourist destinations, open to innovative ideas from restaurateurs and vintners. The profiles of culinary and enotourists presented by M. Woźniczko et al. (2015) are very much alike. Such people live in large cities (59%), belong to the age group of 24-44 years old (52%), have university degrees (62%), are full-time employed (64%), and have a small financial reserve for additional expenses after covering all travel and accommodation costs (62%).

The survey on wine tourism conducted in 2016 (Trędowicz, 2017) (Fig. 7) was mainly completed by young people between 18 and 24 years of age (56%), and between 25 and 34 (20%). Only 9% of those surveyed were older than 44. The majority of respondents were women – 73% of the total number. Just over half of the respondents had university degrees (54%).

*Figure 7. Spanish regions named by respondents* (Source: Z. Trędowicz, 2017, modified)
The respondents described themselves as wine drinkers. Nearly 40% of them declared that they often drink grape wine. However, when asked: What is enotourism?, as many as 71% respondents failed to provide an answer. This suggests a very low level of knowledge about this form of tourism, which is confirmed by the fact that only 3% of respondents have ever been on an enotourist trip.

The respondents also had little knowledge of wine regions in Spain. As many as 69% of the respondents failed to name any wine region in Spain. Others named 9 Spanish regions, mostly Andalusia and Catalonia (9% and 8%, respectively). This is probably a result of them being widely known tourist regions. Respondents listed them, believing that they also are wine regions, not knowing that within these autonomous communities there are numerous wine regions with different names. La Rioja, the leader in winemaking, was mentioned only by 6% of the respondents. Other leading DOs, such as Priorat, Duero River Valley, were not mentioned at all. Therefore, it can be assumed that only a few percent of the respondents had any knowledge of Spain in the context of wine and enotourism (those who named La Rioja).

6. Summary and Conclusions

Wine tourism is gaining popularity worldwide as a form of tourism and especially in Europe, it has traits of culture tourism with a strong educational aspect, to be enjoyed by whole families. Currently, it is no longer perceived as just vineyard tours and wine tasting, but its multifaceted impact on various aspects of how the regions function has been acknowledged. Above all, it has been observed to influence the regional and local economic growth, reflected in the emergence of various services and activation of local communities. Enotourism often provides the basis for the development of culinary tourism in a region, especially based on traditional and regional products (not necessarily exclusively related to wine drinking culture). The existence of wine routes also results in an increased number of people visiting tourist attractions, participating in various events as well as in active tourism.

Spain is a wine country of the Old World, obviously very attractive as an enotourist destination. This is evidenced by numerous, large wine-growing regions, attractive vineyards with sightseeing options, restaurants and accommodation on site, and wine routes with complete infrastructure. However, Spain does not take full advantage of its enotourism potential, which is reflected in a relatively low percentage of enotourists in the total number of visitors. This is also confirmed by wine professionals, who claim that Spain might be an important tourist destination and one of the world’s leading wine producers, but has not yet achieved a relevant position in the enotourism sector (Rząca, 2017). Also the Polish society does not associate the image of Spain with enotourism. The respondents could name just few wine regions of the country that happen to be popular tourist regions.

The survey results also show that Polish people have little knowledge of the very essence of enotourism. The low level of enotourism knowledge indicate the need to educate the Polish society in the field of building a brand recognition, and shows that Polish people are not yet greatly interested in enotourism. The reason are likely the culinary preferences of Poles and their not yet acquired wine drinking culture (56% of the Polish consumers prefer beer beverages – Kosmaczewska, 2008), and the relatively poor promotion of enotourism in Poland.

The potential of further development of enotourism in Spain should be combined with the sustainable development principles, enabling the preservation of natural and cultural heritage of the regions, as well the implementation of a new model of activities consisting in building and strengthening the brand of Spain as an enotourist destination. Such a factor of enotourism development in Spain proves to be a targeted, patient building of a brand, the so-called branding.

The portrayed abundance of infrastructure (vineyards, wine museums, wine routes), the cultural heritage, the winescapes and activities of numerous organisations seem to indicate
that the Spanish are patiently and consistently building their brand. An example of successful branding in the society are actions organised by the Campo Viejo vineyard (part of the Pernod Ricard concern), who organises events in selected cities worldwide (including Poland), called “Streets of Colour”, which include wine tasting and street art promotion (www.camppoviejo.com/pl/odkorkuj-swoje-życie). Other activities of Campo Viejo aimed at branding include inviting bloggers to participate in grape harvests, investing in online marketing, building a clear and informative multilingual website and launching limited editions of bottles in order to strengthen the brand image recognition (Rząca, 2017).

The brand recognition among tourists is also shaped by wine routes, visits to vineyards and bodegas (Spanish wine cellars), where apart from the key factors, i.e. the quality of the drink and the cultural landscape, also honesty, authenticity and hospitality of the locals count. The Niagara Wine Route in Canada, which has been reorganized in the 1980s and 1990s and is successfully branding itself as a New World Wine Route on the global scene thanks to joint marketing efforts of the provincial government and the wine, culinary and tourism industry (Hashimoto and Telfer, 2003), can serve as a benchmark for Spanish wine regions efforts.

The authors believe that the avant-garde architecture of the aforementioned Spanish wineries is an excellent idea, which emphasizes the highest quality of wines and creates the impression of a top-notch enotourism offer. However, it should be noted that the wealth of the regions and wine attractions are causing serious competitiveness within the country, so particular wine destinations are trying to enhance their image focusing on the domestic market as well. To attract visitors, and thus to be distinguished from other DOs, the Bierzo wine route plans to integrate gastronomy and wine tourism, hiking trails, bicycle touring, local history and archaeology sites as well as artistic heritage (del Río Rama et al., 2013). Except for those most unique, iconic places, enotourists may simply not come to many places without promotional work done at the grass roots. The quality of wine is of course fundamental, but encouraging enotourists to visit a given place is the major task. While working on this, the Spanish should also consider the culinary aspect – wine and cuisine from the dawn of history, or at least from the times of the Roman Empire, are naturally connected.

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