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Sustainable Wine Tourism Development: Case Studies from the Greek Region of Peloponnese

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Abstract: Even though Greece has had an agriculture-oriented economy for decades, recently it has relied heavily on tourism, which now constitutes 30% of the national GDP. Successful developmental synergies of tertiary and primary sectors are still in question. Sustainability practices are still in their infant stage in both sectors of the economy, preventing development. This paper aims to study the relationship between tourism and sustainability in wine-related enterprises in Greece. This is achieved through an examination of the successful business practices of Greek wineries from the leading wine-producing region of the Peloponnese and the impact of sustainability toward their operational practices. Many studies have related sustainability to the wine industry and have recognized that for most wine-related practitioners, the first priority is leaving the land in a better shape for the next generation. The study focuses on illustrative successful Greek wineries that participate in the “Peloponnesian wine routes” cluster. Data were gathered from multiple sources, including secondary data, company records, internet information, face-to-face interviews and on-site observations. The analysis of data revealed a number of aspects between the sustainable wine tourism business practices explored and the way that innovation has evolved. Further studies on common denominators and distinguishing criteria between sustainable business practices would be valuable to researchers and practitioners, destination management organizations and regional development policy makers.

Keywords: sustainable tourism development; wine tourism; innovation; sustainable wineries; Peloponnese Greece; wine cooperative networks; Covid-19

1. Introduction

Wine has always been a part of human culture, linking a primary sector of the economy to services and tourism. Recently, the attention being paid to wine production has increased worldwide in relation to wine tourism. Even though wine production and tourism synergies have developed successfully in the mature wine regions of Europe (Italy, Spain, France), nontraditional wine regions best follow the practices of synergetic economies in countries like the United States, New Zealand, Australia, Chile and Argentina. Tourism and wine share a common developmental restriction, sustainability and environmental quality. For a country like Greece, which relies on tourism and the possession of untapped natural resources and capabilities for synergies between the primary sector and tourism, sustainable development and environment preservation is a must. Nowadays, when intensified cultivation threatens the environment and destroys tourism prospects, it is believed that opportunities arise for innovation and the creation of sustainable processes and products in the pursuit of a sustainable competitive advantage. These kinds of processes are believed to be positively-related to business performance [1].

This paper examines oenogastronomic tourism sustainability perspectives in wineries of the Peloponnese, one of the relatively unknown wine regions of Greece. Wineries are surveyed, analyzed and compared to exemplify opportunities in oenogastronomic tourism sustainability in relation to their overall sustainable practices and characteristics. We investigated if, as previous studies indicate, powerful motivations such as strategic, internal and external drivers move wineries to become more environmentally sustainable and cost effective [2].

The indications are that the Peloponnese is a very promising region regarding sustainable wine tourism development if focused on and if corrective interventions are made in winery operational processes. The majority of the wineries in the Peloponnese are small- to medium-sized enterprises (SMEs). They stay competitive by focusing on quality improvement and innovative products, services and marketing. Cooperation between wine production and sustainable tourism development is a strategy that has recently been practiced in order to achieve economies of scale and to increase demand. Some of the best wineries in the Peloponnese participate in tourism clusters such as “The Wine Producers’ Association of the Peloponnese Vineyard” (ENOAP) and the “Peloponnesian Wine Roads” (PWT). Prior studies show that wineries’ success can be achieved through cooperation and through an ongoing effort for long-term sustainability, as described by Villanueva et al. [3]. Our main aim is to detect whether SME’s cooperation is a successful strategy for sustainable wine tourism development in Greece as well; what are the limitations? What are the necessary improvement margins and adjustments?

This paper also studies the tourism orientation of the wine industry of the Peloponnese where SMEs have attempted to create a cluster (PWT) in order to develop the wine industry in a holistic way (cultivation, production, tourism). In order to address this question and to analyze the tourism-oriented course of the wineries in the Peloponnese, this paper is organized into four parts.

Section 1 presents a literature review focused in sustainability, wine tourism, its structural dimensions (cellar door, wine trails and festivals), the regional and comparable aspects of wine tourism in the Peloponnese and some considerations relating to the definition of successful and sustainable tourism markets. Section 2 describes the research study objectives and methodology. Section 3 shows, describes and analyses the results obtained. Section 4 discusses the results and provides some recommendations. Finally, Section 5 presents the conclusion and identifies questions for further research.

2. Theoretical Background

Wine as a cultural product has become a main theme in tourism development. As suggested by Asero and Patti [4], wine, like many regionally typical products, can be defined as a “territorial intensive product” (TIP) since it contains a strong reference to the identity of the territory in which it is produced. Wine regions provide the consummate “destination branding” through their designation of appellation and claims of terroir. Hall [5] defines wine tourism as travel with the purpose of visiting vineyards, wineries, wine festivals, wine trails and wine shows. Wine tourism, or oenotourism, is an important form of rural tourism that provides opportunities for horizontal and vertical linkages within the rural tourism environment. In Europe, wine tourism has largely been developed in the form of official wine roads or wine routes. Wine tourism can be viewed as a regional development tool, which allows for the integration of primary (agriculture), secondary (wine industry) and tertiary (tourism) sectors, highlighting the respective wine territory’s landscape attributes and the uniqueness of its regional “touristic terroir” [6].

The establishment of controlled appellations in the EU provides a significant boost to regional destination branding, which has contributed to a considerable push of winery establishments worldwide; therefore, the localized consumption of certified, cultural and TIP-like wines is a form of resistance to globalization.

2.1. Regional Wine Tourism Development and Enterprise Size

Large established tourist regions in Italy, Spain, France and Napa in the U.S., have international recognition. However, in less developed tourist regions like Greece, Portugal, Argentina and Chile, small- to medium-sized enterprises (SMEs) have developed new marketing tools to meet their needs and compete in the globalizing world of wine [7]. Smaller wineries mean smaller wine tourist groups and more customized and personalized services. It seems that wine tourism fits small wineries better, as researchers have found that smaller sized groups of tourists have increased feelings of gratitude and obligation, which results in increased sales per purchase [8]. This growth of such wine-related SME's has given rise to wine tourism and wine trails globally. SME's have employed a variety of innovative and neoteristic approaches such as clustering, to remain economically sustainable in the very competitive tourism market.

Successful wine tourism cases, regions, vineyards and wineries regularly use “collaborative marketing techniques” in order grow [9,10]. Some of these collaborative marketing strategies include wine trails, passport programs, and wine festivals. Most wine producers join horizontal networks for immediate tangible benefits, such as buying partnerships to achieve better economies of scale and resource efficiency; and create depth and interest in the tourism product of a wine region [11]. Horizontal relationships provide many intangible benefits as well, like sharing of industry-specific knowledge and best practices, technology sharing and overall increase of product visibility. This sharing is essential to the SMEs sustainable grow [12].

2.2. Wine Tourism Growth and Sustainability

While global wine consumption is growing, environmental sustainability in the wine industry is receiving increased attention from retailers, governments, environmental groups, and consumers. Along with this growth, wineries are also facing issues on environmental sustainability such as water consumption, waste management, and impact on the community. The local environment, community and economy can all be negatively impacted by the wine growing industry and vice versa. Drivers to increased sustainability have been examined by a number of different studies and have been categorized as individual and institutional. Previous studies also suggest that there are powerful motivations for wineries and tourism-related businesses to become more environmentally sustainable, due to strategic, internal and external drivers. These motivations lead SMEs to sustainable practices such as water, waste, energy management, risk management, supply chain management, employee training and community relations [13].

The pressure for sustainability practices, products and services starts from external drivers such as customer demands, investors, communities, government, and the need for compliance with regulations. There are also strategic drivers such as the need for competitive advantage, differentiation, marketing benefits, public image, quality product reputation, and cost efficiency. Finally, there are internal drivers such as managerial attitudes, safety of the employees, company culture, concerns about environmental impact, and social responsibility [14].

A wine tourism market can be considered successful and sustainable through the loyalty of returning wine tourists and the ability to attract new tourists to the winery or wine region (Yuan et al., 2008). Supplemental products and services are required, such as regional recreational opportunities, wine tasting festivals, educational services, customer service, and knowledgeable winery staff, in addition to the core product of the wine itself [15]. Generally, long-distance tourists do not plan visits to a wine region based on the presence of wineries and wine products alone, but seek a wide variety of cultural tourism and outdoor recreation [16]. The presence of exceptional customer service at the individual winery and throughout the wine region is also essential, which causes increased amount of word-of-mouth marketing from visitors to their friends and families [17]. The desire of guests to access knowledge of the wine makers and the winery staff characterizes wine tourists as engaged in this educational service, which is an important part of the winery experience [15,18,19].

In the quest for a sustainable economic wine tourism model, social and environmental factors must also be considered and balanced [20]. Wine regions are typically located in rural areas, and in order for wineries to be successful in attracting wine tourists, they must have the support of the local community where they operate. Wine tourism markets have to rely on the members of that local community to provide supplementary services to wine tourists visiting the wine region [21]. However, rural areas cannot always provide the proper infrastructure to support the wine tourist market. Proximity to larger cities, restaurants and population can further sustain long-term viability [22].

For the most part, environmental concerns for a sustainable wine tourism market include soil degradation, land use, and the amount of water used for irrigation [23]. Sustainable solutions exist for wine tourism-related businesses, such as field rotation, water conservation, use of photovoltaic and geothermic energy sources, use of recyclable material, bioclimatic construction, monitoring of resources through technological applications, certifications for environment protection, voluntary participation of wineries in sustainability agreements and more [24]. Developing a comprehensive and sustainable tourism plan merged with sustainable wine production practices will lead to strong economic growth for wine tourism markets. The primary sector needs a link with tourism to connect local products, countryside, traditions, and cultural values but also to place emphasis on the uniqueness of a territory [19].

2.3. New Technologies (Innovation) and Sustainability

The importance of the new technologies and innovation into wine SMEs could have multiple and positive influences such as cost-reduction, product differentiation, process innovation, and improvements of managerial organization [25].

Innovation in the wine industry and its correlation with the development and competitiveness of firms and regions has been gaining interest amongst scholars. Most research provides insight into the territorialized nature of the diffusion of innovation within the wine industry, considered not only as physical conditions, but also as the social and institutional context, which encourages collaboration among the actors [5,26]. Research suggests that there is a positive correlation between networking and the propensity to eco-innovate vertical and horizontal collaboration within the supply-chain, which accelerates the adoption of ecological innovations [27]. Social conventions are the main factors affecting decision making related to innovation for small family firms, as described by Gilinsky et al. [15] in a study about family wineries, which analyzes incentives and barriers to innovate under the influence of location. On the other hand, the presence of large firms within a cluster seems to positively influence the diffusion of innovation, as demonstrated by Taplin and Breckenridge [25]. The absence of large enterprises in the Peloponnesian cluster might be a reason for the lack of innovation. Innovation depends upon co-location linkages inside a wine cluster between customers, suppliers, grape growers, industry associations, centers for research and all other actors involved in wine industry.

Studies also show that environmental certifications could increase the awareness of environmental impact and promote investments which are related to the innovative profile of firms [1,28]. The certification of environmentally friendly practices and the labeling of the eco-certification on the product and services are believed to provide specific benefits to the enterprises, such as improved reputation or increased product quality, which can even lead to a price premium [29].

2.4. Regional Wine Tourism in the Peloponnese

This paper investigates potential sustainable wine tourism practices in the region of the Peloponnese with lessons for emerging markets, which makes the familiarization with winery tourism research in the Greece very important. Most of previous publications have focused on the more popular regions of the Mediterranean wine making countries. A few studies have focused on some dynamic wine regions of Greece such as the Aegean, Macedonia, Thessaly, Attica and Crete. Many such studies have dealt with both the consumer and producer perspectives. Previous studies on the Greek wine industry and wine tourism efforts have been published in the past by Fotopoulos et al. [30],

Alebaki et al. [31], Nella [6], Dimaras et al. [29]. Others, such as Kologianni and Klavdianou [32], and Vlachvei and Notta [33], have studied the Wine Roads in Greece as a cooperative scheme for the development of local wine tourism in rural areas.

However, there are no studies to date investigating the existence of sustainable wine tourism practices in the Peloponnese, which is the biggest wine producing region of Greece. Part of the explanation for this could be the fact that it does not constitute a single administrative entity, which creates difficulties in drawing conclusions and realistic policy recommendations. A second reason is that even though it is the largest wine region in the country, it has been accused of being static and not following closely new international trends.

The wine region of the Peloponnese is one of the oldest wine-producing regions of Greece and it is the largest wine making area of Greece. There are 180 wineries in 22,000 hectares of vineyards, producing annually approximately 1,500,000 hectoliters of wine. Forty-one of these wineries focus in their sustainable tourism development along with their wine cultivating development as a holistic operational model for long-term economic sustainability. There are famous Appellation of Origin quality wines in this region. During the last few decades, many of the wineries in the Peloponnese have strived to optimize their production by investing in technology, sustainability and new methods of cultivation and production. In this region, wine tourism has emerged as a new tool for industry development with benefits in branding and marketing, and financially becoming an integral part of the future development of the local wine industry. The nature and extent of the wine tourism product offered by the Peloponnesian wineries is related to participation on tourism events such as open days, wine trails, festivals, and competitions.

3. Research Method

The main objective of this study is to investigate sustainable oenogastronomic tourism practices of wineries in the Greek wine region of the Peloponnese and detect any limitations and necessary improvement margins and adjustments. In addition to the existing literature about the Greek wine industry and wine tourism, we focus on the relatively unknown wine region of the Peloponnese, and the tourism cooperative initiatives that have taken place in order to promote wine tourism development. The wineries of the region are surveyed, analyzed and compared to identify opportunities in oenogastronomic tourism sustainability in relation to overall sustainable practices and characteristics of the wineries. The paper examines the structural dimensions of the Peloponnesian wineries and relates these to their wine tourism product in order to understand how these SMEs support sustainable tourism development.

To address the research question, and given the gap in data for these wineries, we conducted a secondary research survey of the wineries in the region, using lists from the Ministry of Agriculture's winery websites, The National Professional Organization of Vine and Wine (EDOAO), The Wine Producers' Association of the Peloponnese Vineyard (ENOAP), and the official cluster of wine tourism in the Peloponnese or the "Peloponnesian Wine Roads". At a time when vast amounts of data are being collected and archived by researchers all over the world, the practicality of utilizing existing data for research has become more prevalent [34]. Secondary analysis is an empirical exercise that applies the same basic research principles as studies utilizing primary data and has steps to be followed just as any research method [34]. Hakim [35] defines secondary data analysis as knowledge additional to, or different from, that presented previously with an investigation on what remains to be learned about a topic through reviewing secondary sources in the area of interest [36]. The region of the Peloponnese hosts 180 wineries. The survey was created to maximize data capture on a variety of economic, environmental and social indicators and included a review of the literature surrounding wine and sustainability indicators, and a review by knowledgeable practitioners and academics in the field. In order to secure the wineries that meet the maximum criteria for legal operation according to Greek law, we chose to examine wineries that possess most qualitative criteria fulfilling operational and tourism-related specifications, thus were listed as legally licensed by the National Professional

Organization of Vine and Wine (EDOAO) (180 wineries), and meet the relevant credentials as members of The Wine Producers' Association of the Peloponnese Vineyard (ENOAP) (57 wineries). The final study was made to the 41 wineries of these 57 that qualified to be members of the cooperative wine tourism cluster of "Wine Roads of Peloponnese".

The parts of the survey relevant to this article focused on multiple areas. First, the general characteristics of the winery, including ownership, history and acreage; Second, the production and sustainability-related data. Third, tourism-related data, which include the ancillary products offered by the winery. Forth, some basic technology-related characteristics. A closed-end type of survey questioning was used in all sections [30,37].

4. Findings and Discussion

In this section, the research results are exposed, and specific findings are highlighted Table 1. No sophisticated statistical analysis was attempted, as the study conducted was essentially a baseline or benchmarking type study. These data and analyses enable comparison between similar and future studies in other wine country tourism industries, and even in the same region of the Peloponnese. We consider that the final sample of forty-one wineries that participated in the study has an acceptable degree of fit with, and proportionality to, the majority of wineries in developing wine tourism countries.

Table 1. Most relevant data collected from the participating Peloponnesian wineries (41).

<i>Total</i>	<i>Per Category</i>	<i>Four Winery Attributes</i>	<i>Results</i>
1	1	Wineries founded in the twenty-first century	17%
2	2	Wineries privately owned	100%
3	3	Average planted land area of vineyard (stremma 1000 m ²)	325 Strema
4	4	Average Annual production/bottles	247.000
<i>Four Production and sustainable attributes</i>			
5	1	Growing multiple varieties (more than four)	100%
6	2	Existence of Protected Designation of Origin (PDO) and Protected Geographical Indication (PGI) wines produced	78%
7	3	Organic Cultivation	48%
8	4	Production of Organic, Natural, Biological grown products * (wines, oil, vinegar)	15%
9	5	Application of green Practices *(Overall)	15%
10	6	Certification (of any kind)	44%
11	7	Average distinct types of wine produced	13 each
<i>Four Tourism indicators</i>			
12	1	Sales at cellar door/winery	83%
13	2	Wineries located on (participating a wine trail)	100%
14	3	Wineries have tasting rooms	100%
15	4	Wineries pare local food with wine tasted	66%
16	5	Tours available	95%
17	6	Tour languages available (more than two)	49%
18	7	Charge of Tours	83%
19	8	Access for disabled individuals	73%
20	9	Family and Children-friendly (reception, meals,	19%
21	10	Children-friendly (Playground, activities)	17%
22	11	Guest House	15%
<i>Four Basic Tech indicators</i>			
23	1	E- shop	22%
24	2	Credit Card acceptance	53%
25	3	Free Wi-Fi	88%
26	4	Site	100%

Sources: Author elaboration.

4.1. Wineries Attribute

Data were collected so as to understand the general attributes of the wineries. Table 1 shows that the plurality of wineries was founded in the twentieth century (76%), showing that the wine industry in the Peloponnese is rather old. About 17% of them were built during the twenty-first century and are young and modern, while seven percent (7%) were built in the nineteenth century. All the wineries are privately owned and are located in agricultural areas of the region close to the grapes they cultivate. Most wineries occupy relatively large plots of land for Greek standards. The average winery and vineyard property corresponds to 326 stremma. This corresponds to approximately 32.6 hectares or 80 acres, respectively. The average annual production from the wineries studied was approximately 247,000 bottles per year. Thirty-nine percent (39%) of the wineries are small producers, producing under 100,000 bottles/year, whereas 61% were producers with over 100,000 bottles per year.

4.2. Production and Sustainable Attributes

All of the wineries in the study grow more than four grape varieties (average of seven). They strive for quality improvement and innovative products requiring strong R&D. It is interesting to note, as an index of sustainability and local flora preservation, that 91% of the grape varieties cultivated in the Peloponnese are indigenous to Greece. Of the wineries studied, 78% cultivate their grapes in either Protected Geographical Indication (PGI) or in Protected Designation of Origin (PDO) zones producing quality branded unique wines. In addition, 48% of the wineries cultivate partially or totally using organic methods, producing organically grown grapes, which they use for their wine production and can be labeled as “Made with Organic Grapes”, while 15% of the participating wineries produce either organic or natural wines. Furthermore, 15% of the participating wineries apply green practices (energy, water, fuel), at all stages of operation and 44% of the wineries have been certified for their good practices regarding quality Management System, organic Environmental Management System (EMS), and Biologically grown products certifications (BIO). The study also found that the participating wineries produce an average of 13 different types of wines.

4.3. Wine Tourism Indicators

The data indicate that the majority of the wineries sell at the cellar door. However, for 82% of them, this was a small fragment of their total sales. In addition, 100% of wineries surveyed participated in a cooperative cluster, however, this entails 23% of the total wineries operating in the Peloponnese, even though these are the best and the largest of the total 180 wineries. All of the wineries have tasting rooms and more than 50% have well organized, contemporary and fully equipped tasting rooms able to serve an average of more than 30 people at once, while 66% of the wineries pair their wine tasting with local food, bread, cheese or other local delicacies. Some offer simple snacks, while others have full meals available. They pair local food with wine in hopes of increasing the length of the tourists' stay, balancing the alcohol and creating a more rounded gastronomic experience. Exactly 95% of the wineries offer tours to their facilities, vineyards, cellars, production line, tasting room, other facilities of tourist interest such as, folklore museum of agricultural tools, or facilities of olive oil and honey production. In addition, 49% of the wineries offer their tour in two languages, Greek and English, while 27% offer in three languages, 15% in four languages, and 5% in five languages. Most (85%) of the wineries charge for the tour, and 73% offer access to handicapped visitors. Only 19% of the wineries are considered family-friendly, while only 17% of the wineries are children-friendly by offering a playground and babysitting services. Finally, 15% of these wineries have private guest houses at the winery estate, so visitors can stay overnight.

4.4. Basic Tech Indicators

It is noteworthy that 22% of the wineries have an e-shop and conduct sales through it, while 54% of them accept credit card payments either for wine purchases or for tour fees and other products

(olive oil, honey delicacies, souvenirs). In addition, 88% offer free Wi-Fi, so mobile apps and other functional and tourism related services can be realized. All of these wineries have websites that present the winery, their wines, infrastructure facilities and other services in at least two languages.

5. Discussion

From the data collected, it is clear that a large percentage of the wineries have a relatively small production. Taking into account the size of the planted vineyards and the fact that each winery produces an average of 13 distinct types of wines, we conclude that most of their products are of limited edition. This means that they must rely on high quality and distinct characteristics in order to survive, since there are no economies of scale as far as production and exports are concerned. Small production per product means that absolute dedication to quality is the only way forward for these businesses. This is one of the reasons that wines of the region have improved so much over the last 15 years and have achieved honors and awards in international competitions around the world. Another reason of quality improvement is the involvement of well-trained personnel and experts such as oenologists, as well as investments on modern equipment. Of the wineries participating in the cluster of wine roads of the Peloponnese, 76% were founded in the twentieth century and seven percent (7%) were built in the nineteenth century, which means that the vast majority of the wineries are rather old.

Early wineries have a long history, as they pioneered contemporary cultivation methods when founded, introduced new vinifera clones from Europe, new wine making innovations, and used state-of-the-art machinery. They are wineries with great wine producing tradition and a strong brand. Today, some of them are fourth-generation winemakers, who give the region wine recognizability, which is very important for branding (commercial and touristic). As such, they are historic destinations, and in several cases they constitute regional tourist attractions, attracting the interest of cultural tourism seekers for their extraordinary nostalgic architecture and preserved artifacts. On the other hand, many of the older wineries from both groups (nineteenth and twentieth century) lag behind in terms of productivity and energy efficiency, which might be sacrificed due to the preservation of their historical constructions. According to our study, this is one of the main reasons that causes a low sustainability performance (15%), which takes into account overall applications of green practices such as vinification, production, operation, and marketing. On the other hand, the wineries built in the twenty-first century (17%) follow modern structural characteristics (bioclimatic) and sustainability practices (energy, water, waste). The vast majority of the wineries founded in the twentieth century have been financed for modernization through co-financed initiatives of European Union Funds. Some of the wineries founded in the twenty-first century are modern, with state-of-the-art equipment and satisfactory tourism infrastructure.

The existence of wine tourism networks and clusters, such as the wine trails of the Peloponnese, represent developmental tools for the region, and more wineries should participate. All around the world, wine trails consist of groups of wineries within distinct viticultural areas, which jointly promote member wines. Henehan and White [5] give wineries a chance to work collaboratively in the globalized wine market, complement each other and typically everyone helps every participant to flourish. Wineries are aware of the need for collaboration and for forming strategic alliances, but the competitive nature of the market makes it difficult sometimes. This might be the reason why out of all the wineries of the Peloponnese (180), only 41 (23%) participate in the regional wine trails. There are seven different wine trails in the Peloponnese with 32 thematic routes connecting wineries, vineyards and many tourism related sites, such as ancient monuments, churches, local businesses and more. Through these routes, a tourist can visit almost all of the remarkable sights of the region, combining gastronomy and wine tourism with a great variety of activities. Some of these activities include cellar door and wine tasting rooms, which—globally—are the focal points of wine tourism [38]. All of the wineries studied offer wine tasting rooms and tours (some upon request). The majority of the wineries (83%) have wine shops in-house and sell at the cellar door, while 85% of the wineries charge for the tour offered (host, guide, translator, and wine service and food expenses) and 12% of

them offer tours for free, while 2% do not offer tours at all. Previous research into cellar door sales and consumer attitudes in South Africa showed [39] that cellar door direct sales account for 70% of income generated. Unfortunately, this is not the case for the Peloponnese, as the cellar door sales represent a small fragment only of their total sales.

Another study has shown that one of the greatest barriers in choosing wine tourism as a tourism destination is the lack of information regarding the services offered [40]. Fortunately, all wineries participating in the study have modern and informative sites translated in at least two languages. Surprisingly, only 22% of them have an e-shop and make sales through it. This could be very important for direct selling, especially during the Covid-19 pandemic and the increase in electronic sales worldwide. Additionally, only 54% of them accept credit cards, either for purchases electronically or on-premises, for tour fees and other services. This could be another handicap, especially now, when the use of cash is not suggested due to the Covid-19 outbreak.

In our study, we found that only 73% of the participants produce either certified Organic, Natural, or Biologically grown products such as wine, oil, or vinegar, even though the majority believe that these kinds of certified wines would benefit sales overall and would improve the perceived quality value and the winery brand. Certification seems to promote continual improvement and constitutes quality motives, leading to performance improvement of the organization as a whole while having a positive impact on firm performance, specifically on perceived economic impact, perceived environmental impact and perceived customer quality and satisfaction. In our study, less than half of the wineries (44%) have been certified for their practices regarding quality Management System, Environmental Management System (EMS), organic cultivation, and Biologically grown products certifications (BIO).

A wine trail replicates and enhances the personal experience that tourists seek. Therefore, perceived quality and enhanced service on the wine route is important to establish a profitable wine tourism product. Better service and quality leads to repeat visitors, and oftentimes branding empowerment through positive word of mouth advertising [13]. In 2009, Bruwer and Alant concluded that first-time visitors to a wine region care more about being able to learn about wine, while repeat visitors to wineries also valued educational activities [41]. Furthermore, winery tours and other education programs, such as winemaking seminars, cooking classes, museum tours, are effective ways of achieving service satisfaction for wine tourists [16]. A good indicator of such activities in our study is both the existence of tours, offered by 95% of the wineries studied, but also the tour languages available. Interesting enough, 49% of the wineries offer their tour in two languages, Greek and English, 27% in three languages, 15% in four languages, 5% in five languages, 2.5% in six (some on request) and 2.5% in seven languages. This evidence shows that there is a lot of interest among travelers of different nationalities and that special groups worldwide might organize thematic trips to the Peloponnese as an upcoming wine tourism region, or that the wineries have clientele from such countries already.

Wineries pair local food with wine tasting in the hopes of increasing the length of the stay, balancing the alcohol, increasing income and creating a more rounded gastronomical experience. In our study, a satisfactory 66% of the wineries pair their wine tasting with local food, bread, cheese or local delicacies for their visitors. Cluster plans are for the 100% pairing of local wine and local food pairing by all participants. Wine festivals present an interesting collaborative and market opportunity for wineries. They often feature live music, local food and educational sessions [26]. These festivals are an opportunity to build repeat business for cellar door sales and have been found to be the second most valuable promotional activity, following only wine tastings [12]. Such wine festivals encourage visitors to spend the night at the wine region [42]. Several wine trails of the Peloponnese participate in cultural festival such as in Ancient Olympia, Patra, and Epidaurus, prolonging the wine visitor's stay. Other areas have organized thematic wine related festivals such as the successful "Oinoxenia initiative" in the Aigialia wine region. Some wineries organize cultural events where the people come close to local artists. Such initiatives are the summer cultural festival of the Britzikis winery in Ilia, with performances at their open amphitheater, where music concerts of all kinds and theatrical plays take place every summer accompanied with wine tasting and local gastronomy events.

A tourist is more likely to attend a multi-day wine trail if there is overnight lodging available involving local community and other production sectors [42]. The existence of hospitality facilities is crucial, but only 15% of wineries in our study offer guesthouses on their property. This enhances the tourist experience and contributes to tourism income. In many cases, these guesthouses belong to the newer built wineries (twenty-first century), following high sustainability standards with the use of photovoltaic, geothermic, wastewater management, composting, gravity flow techniques and more.

Some troubling findings in our study, which hinder tourism sustainability and overall development, is the fact that the 27% of the participants in the tourist-oriented wine trails do not offer services and access for people with physical limitations. Sustainable (social) tourism development cannot flourish while excluding a segment of the potential visitors and employees, and while not offering equal access to all and excluding elderly, high-end visitors who are part of the primary target group of wine-related tourism. Another obstacle to tourism development is the fact that 81% of the wineries are not “family-friendly,” offering any kind of activities for the whole family, or appropriate meals, and another 83% of the wineries are not “children-friendly,” offering playgrounds or babysitting so that adults can enjoy the tour. The majority of them, 83%, only offer juice to children and nothing else. There is no future for tourism sustainable development while excluding the elderly, the disabled, families and children.

Regarding some basic technology indicators, all participating wineries have informative websites with a profile and information about the winery and activities offered to visitors in at least two languages. Surprisingly, only 22% have e-shops and make e-sales year around, a capacity that would be very useful going forward due to the Covid-19 pandemic. E-shops are an easy way to reach final customers that would like to repeat purchases either after a satisfactory visit to the winery, or having tried the products elsewhere. Either in-house or through an e-shop, only 54% of the wineries accept credit card payments, while 88% offer free Wi-Fi. Such a service would offer mobile apps and other managerial and tourism related services and capabilities that could be realized through new technologies like real-time information, translation, remote management, connection with weather data for cultivation, monitoring, and much more. The proposed sustainable development goals achieved through wine and food tourism in a region, with the corresponding practices derived by the analysis of the participating wineries alone with the proposed sustainable management tools, are presented in Table 2.

Table 2. Objectives for regional sustainable development.

	Sustainable Development Goals	Corresponding Practices	Sustainable Management Tools
1	Safety and Health Ensuring healthy lives and promoting well-being at all ages is essential to sustainable development.	Organic and green practices in vinification, cultivation, production and goods offers in wine tourism. Free pesticides and chemical free production	Financial incentives Eco-labels Quotas set Cooperation and clustering all stakeholders Continuing education
2	Education offered inclusive, equitable quality education for all stakeholders	Use of Technology Education during tours informative sites and media material by the wineries enables information transformation and appreciation for nature, people and the wineries	Financial incentives for wineries and personnel Excellence Awards Continuing education for personnel and partners Translation of tours in many languages
3	Equality/Accessibility is a fundamental human right, and necessary foundation for a peaceful, prosperous and sustainable world.	Winery facilities Infrastructure and actions designed for easy and free access for all	Financial incentives Tourist environmental/social sustainability tax Excellence Awards Non Access fees Technology application (sites, translation apps) with services and operating protocols for all including handicaps, elder, children

Table 2. Cont.

Sustainable Development Goals	Corresponding Practices	Sustainable Management Tools
4 Climate Action Low foot print Clean energy Water and Waste management Urgent action is needed, by regulating emissions and promoting renewable energy	Setting a limit on the number of expenditures per winery and tourist. Cultivation of indigenous grapes Using seasonal and local products Using Renewable forms of energy (Photovoltaic panels, geothermy, Bioclimatic contracture, free gravity operation	Use of Environmental Management System EMS Financial incentives Eco-labels Quotas set Tourist environmental tax Access fees
5 Protecting and Enhancing Cultural Heritage, Local Identity and Assets	Promotion of local heritage, wine culture, wines, architecture, and techniques through tours, food and wine pairing, seminars, wine museums Cooperation with local businesses and participation in wine festivals and other cultural tourism activities	Protected Designation of Origin (PDO) and Protected Designation of Origin (PGI certifications Quality and authenticity labels Financial incentives Measuring and evaluation mechanisms Environmental Audits
6 Economic growth sustainable economic growth and decent employment for all	Sustained and inclusive economic growth can drive progress, create decent jobs for all and improve living standards in a region.	Financial incentives by government (EU assistance coo financed programs) for fostering cooperation, innovation and knowledge sharing Continuing education for personnel and partners
7 Industry and infrastructure by building resilient infrastructure together with can unleash dynamic and competitive economic forces that generate employment and income. They play a key role in introducing and promoting new technologies, facilitating trade and enabling the efficient use of resources.	Technology application in vinification with virus free clones In weather detection for better cultivation, Technology application in winemaking process and innovation in capping, fermentation detection, Technology application on Cooperation and Clustering and knowledge sharing for efficient management	Financial incentives by government (EU assistance coo financed programs) for fostering cooperation, innovation and knowledge sharing Excellence Awards and recognition setting Continuing education for personnel and partners
8 Responsible consumption	Fostering eco-friendly production, reducing waste and boosting recycling through operating standards for personnel and visitors Educational seminars Sustainable consumption and production can also contribute substantially to the transition towards low-carbon and green regional economies	Financial incentives by government (EU assistance co-financed programs) Excellence Awards Continuing education for personnel and partners Quotas set
9 Partnership for sustainable development by all stakeholders of the region	Participation in clusters and cooperative schemes such as ENOAP and Wine Roads of the Peloponnese	Quality Cluster membership labels. Financial incentives and membership benefits (marketing, negotiation, cluster supply chain, coaching)

5.1. Covid-19 and Wine Consumption

According to the latest World Tourism Barometer [43], the Covid-19 pandemic has caused a 22% fall in international tourist arrivals during the first quarter of 2020, while the crisis could lead to an annual decline of between 60% and 80% when compared with 2019 figures. After the pandemic, market experts expect a dramatic shift towards off-premises sales, and a new awareness and emphasis on origin of local products.

5.1.1. On-Premises vs. Off-Premises

Since the beginning of 2020, there was a notable global rise in demand for eat-out experiences. Consequently, this led to more frequent wine consumption in the on-premises section, increased spending and trading up to more premium choices, and wineries visits. With the Covid-19 lockdown, there was a serious blow to the on-premises market, which has almost wiped out restaurants, wineries and hotels in a number of markets. This might represent one of the biggest changes in the wine market. Our study found that 82% of the wineries offer sales on-premises, however, this is a small fragment of their total sales, and therefore potential losses might be limited. On the other hand, e-commerce is growing. In the Peloponnesian cases studied, only an extremely small percentage (22%) have e-shops and only 54% accept credit cards. This is a serious life-threatening disadvantage for the wineries, and the situation must change rapidly with wineries adapting to new market reality. The inevitability of global economic recession suggests that there will be a switch to at-home consumption of wine for the medium and potentially long-term, reducing wine tourism visits and on-premises consumption. However, the fundamental customer need—to have a unique and memorable experience in out-of-home settings—will continue, but not as frequently, and most likely with a more restricted budget. Greece is considered a “Covid-Safe destination”, and a best practice country that handled the Covid outbreak exceptionally and efficiently, a reality and brand which is expected to influence both wine sales and tourism visitation positively.

5.1.2. Wine Origin

Another emerging shift in consumption is a new emphasis on local wines with certification of origin and quality assurance indication. Experts anticipate a renewed focus on domestic and local wine in wine producing countries, reflecting the national population’s tendency in becoming more inwardly-focused and protective. This will also reflect consumers’ agenda to support their local businesses and jobs during an economic crisis, which means a forced reengineering of the market and customer behavior changes, such as Australian buying Australian, Americans buying American, and a deflecting demand from other foreign markets, especially those hit by Covid-19. Potentially, there could be a consumer backlash against certain countries and regions depending in how successful the pandemic was managed, and if there was a production decrease due to lockdown that led to a supply shortage. In our study, 78% of the wineries produce Protected Designation of Origin (PDO) and Protected Geographical Indication (PGI) wines, 44% of the wineries have been certified for their good practices, while Greece is considered as one of the countries who handled the Covid-19 outbreak exceptionally well. These characteristics—if communicated to the international markets properly—are expected to have a positive impact in future Greek wine sales and tourism-related visitation.

6. Conclusions

The Peloponnese is the leading wine producing region in Greece. However, it is not as dynamic as other wine regions and not well developed in wine tourism, regardless of the fact that the region includes some of the world-class historical monuments and sites such as Ancient Olympia and other major transit centers such as the port of Patra and Katakolo, the airports of Araxos, Achaia and Kalamata. Wine tourism is still in an infant stage. Valuable efforts have taken place the last decade, as cooperative schemes have been formed, such as wine trails, where some of the best (41 out of 180) wineries of the region participated in a tourist cluster connecting archeological sites, wineries with stunning landscape, and unique local wines with characteristic terroir. Wine tourism addresses a niche market, which can be combined with all different types of tourism, developing the region, strengthening regional branding. The region of the Peloponnese is unified regarding wine production and wine characteristics. Administratively, however, it is divided into two regions and this is a handicap for the effective branding recognisability of the Peloponnese in international tourism markets.

Network development and cooperation leads to economies of scale and operational effectiveness. Wine tourism clustering initiatives such as wine trails benefit from integration, in both a horizontal manner (within the wine or tourism industry), helping to increase market share, and in a vertical manner (between the two industries), in order to control various stages of production. Today, we observe a new best practice for tourism suppliers: diagonal integration, by connecting many tightly related services. Telfer [44] found an extensive level of collaboration regarding clustering between wine and tourism organizations, but also with other sector clusters including agriculture, food supply chain, and visitor bureau, as well as government and research institutes. To encourage winemakers and tourist operators to collaborate in a very competitive market like tourism is no easy task. Cooperation, trust and commitment to environment preservation, customer satisfaction and quality is required by all participating members in order to make the cluster sustainable. Many studies show that there are major obstacles in network development, including a lack of communication, difficulties in determining specifications and requirements in planning, financial obligation issues, and long lasting understanding, especially in vertical integration, and between cooperative industries (e.g., between the wine and tourism industries), as detailed by Schreiber [45].

In a disturbed global market due to the Covid-19 pandemic, the lessons from cooperation models in wine tourism regions should be strongly considered. Famous regions in the U.S. (California—Napa) and Europe (France, Italy, Spain) enjoy government assistance for marketing and promotion, direct sales, organized retail network, and are facilitated by their powerful global brands, which is an advantage Greece does not possess. Wine producing areas usually exist in mild climates with breathtaking landscapes. Thus, the majority of wine-related SME's around the world have sought to grow their wine production recently more than ever, while focusing on wine tourism as well and not just wine production. Before the Covid-19 crisis, tourism was a trillion-dollar industry, and was forecast to grow until 2050 (World Tourism Barometer [46]). Wineries capitalizing on sustainable tourism-clustering should try to stay competitive and increase profits—especially now, as on-site visits and sales will decrease for a while. This cooperative relationship among businesses of the same sector and vertically with other sectors can help wine SMEs of less developed regions like the Peloponnese to develop, through a focus on sustainability (financial, environmental and social), product and service quality, economies of scale, effectiveness and shared educational opportunities for tourists. The Peloponnese is a region with great potential regarding agricultural production and the tourism sector. Because of its location, its size, its infrastructure and the unexploited tourism attractions including great wines, the Peloponnese, hit the least by Covid-19, could be the next upcoming destination in the Mediterranean and in the tourism portfolio of Greece through continued, focused marketing. After the Covid-19 crisis, visitors will likely prefer less popular and crowded destinations. It could be a great opportunity for the region to develop a very sustainable wine tourism and wine industry, while it will help wineries to promote themselves as safe and Covid-free, a “brand” that will help them sell their products worldwide while attracting visitors. Basic requirements by the wine-related enterprises in relation to tourism are the revision and the modernization of services for the disabled, families, and children, the introduction of innovative products and services such as technology (mobile apps, e-shops, virtual reality, and augmented reality services), the enhancement of cooperation and the continuing education of staff and visitors.

This research identifies multiple areas of economic and sustainable tourism development, focusing on the region of Peloponnese and the wine industry. Future research should include new data collection methods, taking into account new side effects and forced operational changes due to Covid-19 on the financial and operational level for both tourism and the wine industry. Before the Covid-19 crisis, tourism was contributing up to the 30% of the Greek GDP, while agriculture contributed approximately 3%. In the years to come, wine should cooperate with tourism in order to develop collectively, grow their market share through tourism marketing, strengthen local and regional economies, and give depth and versatility to the Greek and the Peloponnesian tourism product.

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