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REPORT OF GASTRONOMY
TOURISM IN ITALY
TRENDS

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1 THE TASTE OF VALUE



Food and wine tourism consumption belongs to the past. **The future is based on the uniqueness and emotionality of the experience, in harmony with the environment in which the visited reality is inserted.**

The agri-food company will increasingly present itself as an ambassador of an evolved territorial society, whose attractiveness depends on its ability to generate value for the tourist, for the resident and for the whole community connected to it, highlighting the ties of solidarity which it has fortified over the years.

The ideas that bridge different environments (art, music, culture, well-being and new connections between cities and rural areas), the communication focused on real corporate sustainability, the involvement of the visitor in the good practices initiated by the company, and actions for social and environmental improvement will win. Tourists want to experience a human relationship and connect with people who live in a rural context.

Sustainability is an essential value in its full social meaning. The companies that educate the consumers and make them part of an improvement process will win, integrating the direct experience with digitization and adding to the well-established storytelling, the innovative communication through gamification, and through emotional podcasts.

The act of sharing appears as a new trend also in rural hospitality on the horizon. The

world that lived in a pandemic has acquired cooperation as a new value, favoring **the birth of new human relationships and new tourist segments.**

Behavior suitable to reduce environmental, social and economic impacts requires awareness and sensitivity. Being sustainable means taking care of yourself, loved ones, your community. Any behavior can generate positive spillovers which benefit the community. Sustainability can be a powerful driver of choice. It guides people's purchasing decisions - from primary goods to tourism. **It is therefore essential to communicate what is being done for the environment and the local community, so that the consumer can choose them.** Seeing sustainability as a marketing tool does not mean reducing it to a practice of green washing, of mere facade. Sustainability is requirement (manifest or latent) for today's consumer. It should be seized to give you a concrete and effective response.

Food is a connection between peoples, and it has been an instrument of diplomacy for centuries. Today it also acquires a social value. The concept of "social gastronomy" sees food as a tool to achieve beneficial goals.

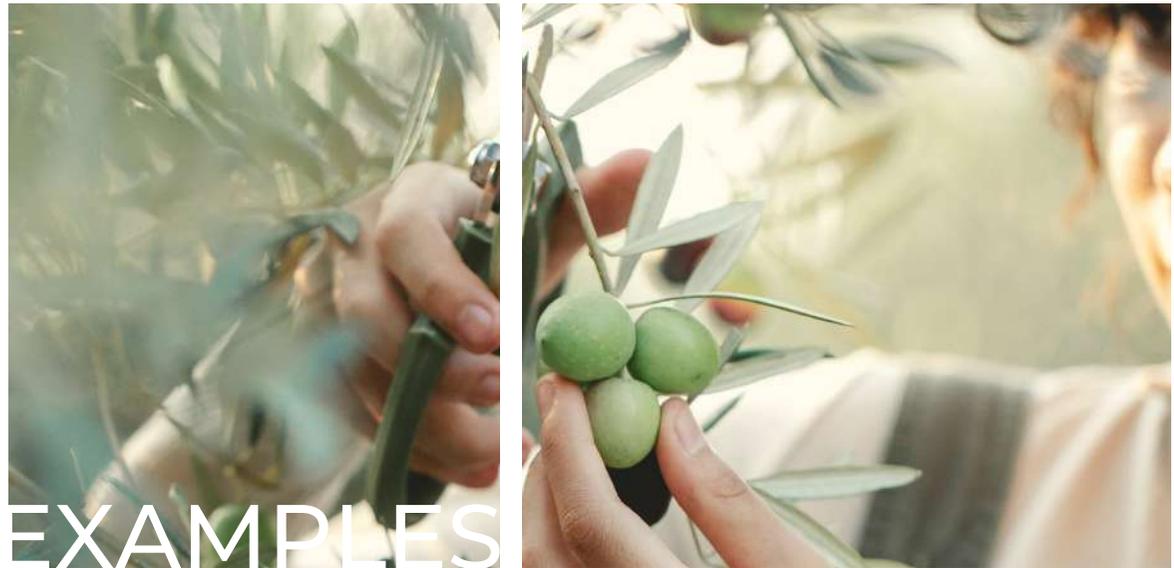
1 THE TASTE OF VALUE

ITALIANS ON THE ROAD

66% would be more inclined to visit an agricultural business when they get the opportunity to receive information during the visit on the ethical choices made, from staff to breeding and cultivation methods.

64% would like to participate in experiences that combine food and wine with art when they visit agricultural businesses.

51% would like to have the possibility to “adopt from a distance” a vineyard, an olive grove, an orchard, and vinegar and receive their own final product (wine, oil, fruit, balsamic vinegar, etc.).



CareBonara: the story of a legendary recipe, Barilla and Food For Soul

International campaign with intense and exciting storytelling to tell the origins of the recipe, as a union between different cultures. At the same time, the donation of one million pasta dishes to Food For Soul, allowing consumers to support vulnerable people in Europe, America and Asia;



RiceHouse

Startup engaged in the commercialization of rice processing waste as suitable green building materials;



Coltivatori di Emozioni

Digital Social Farming portal that allows consumers to adopt and support farmers with sustainable and organic production, who remain in small villages and who are committed to promoting a more sustainable consumption of products.



Borgo Office

Project that connects smart workers with Italian farms. The people hosted stay for free and in exchange buy the company's products and experiences on site.

2

ACTIVE, DEMANDING, INNOVATIVE FOOD AND WINE TOURIST



The food and wine tourist is increasingly demanding. Look for places with beauty and integrity of the landscape, culture and traditions, a welcoming local community, as well as a quality food and wine offering. Search for new food, new recipes, new dishes, new experiences. They like to explore. They love to connect shopping, cultural visits and sport to food and wine experiences. **Creativity and continuous innovation will be the mantra for companies in the sector.**

Trekking through the vineyards, cycling along the white roads and the increasingly equipped cycle paths, interconnections with rail transport, stop traffic and travel in complete freedom. Driven by the wellbeing trend, **the "active" approach of the food and wine tourist is destined to grow**, with benefits not only for the organizers of innovative and assisted travel programs, but also for the tasting "pit stops" along the routes, for the managers of bike shops and recharge points for pedal-assisted bicycles (e-bikes).

A "slow" wine tourism that will gain more and more success, thanks to the completion of the great European routes of cycle tourism such as the Ciclovía del Sole from Verona to Bologna.

In addition to green mobility, **the involvement of the food and wine tourist in the companies' daily activities will increasingly develop** collective harvest, but also sowing, pruning, milking and holidays in contact with animals as a form of pet therapy, for medium-term stays and also for

daytrippers in local tourism sites.

Agri-food companies can get this opportunity, in safety and with insurance policies for accidents, through a new setting for the visits and a viral communication via social networks (Instagram and TikTok in entertainment mode) of the activities carried out during the visits.

The safety issue will also remain central in the medium term. The investments made to encourage visits this year will also be useful in the future, for example, of all-round touchless systems.

2

ACTIVE, DEMANDING, INNOVATIVE FOOD AND WINE TOURIST

ITALIANS ON THE ROAD

55% have made at least one trip with primary motivation food and wine experiences in the last 3 years.

66% would be more inclined to visit an agricultural business when they interact with the local community, spending a day with local producers (e.g., in the vines during the harvest, in the rice fields, etc.).

54% would like to participate in tours of vineyards, olive groves, orchards by bicycle or e-bike.

53% would like to be able to participate in playful proposals such as escape rooms and treasure hunts in production companies, to discover local products and recipes.

61% of Italian tourists define themselves as "innovative".



Trabocchi coast

Bike route among the "trabocchi" of the Abruzzo coast, many of which have been transformed into restaurants, and the inland wineries with the organization of related services.



Wine Tourism for Kids, "Lo Gnomo delle Vigne", Città del Vino

A comic story for children starring the "Lo Gnomo delle Vigne", which tells the story of wine, its culture, the value of the traditions of the rural territories of the Bel Paese; through 3D goggles it is possible to see the comic in three-dimensional form.

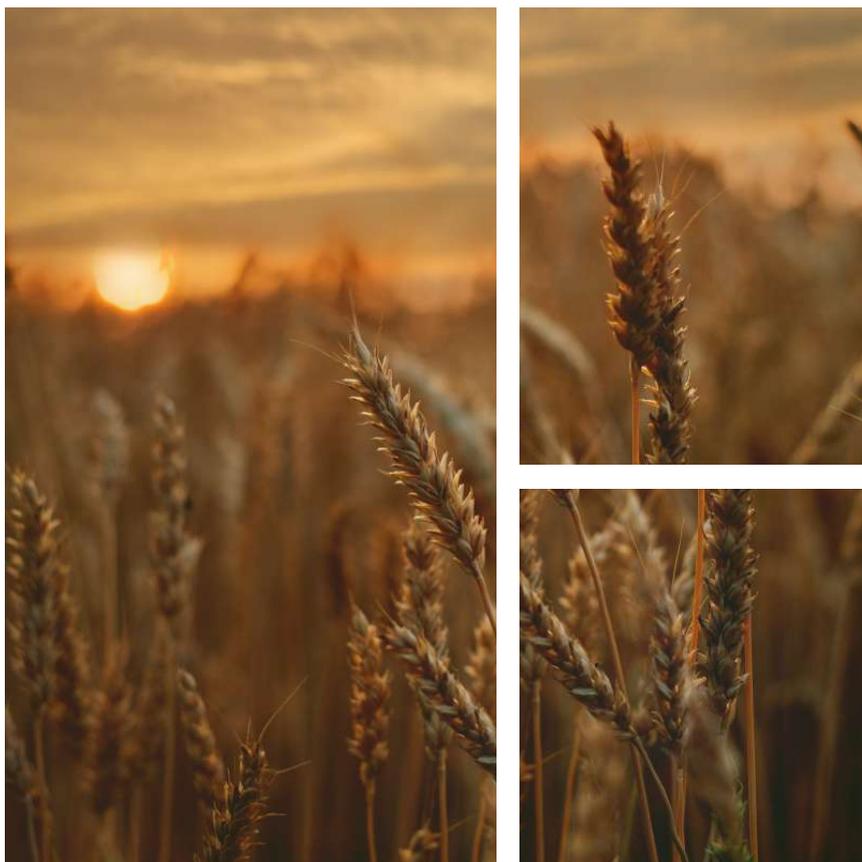


Tuscany Treasure Hunting

A treasure hunt to discover the resources and beauties that the Tuscany region has to offer. Each of the participating teams is given a different path, including museums, accommodation, restaurants and vineyards, but with common stops to enjoy time together and strengthen the team building.

3

NEVERENDING FOOD TOURISM



The journey does not end with the journey.

There is a *before* and an *after* that become elements of preparation, accompaniment, and indelible memory of the experience. The new technologies, which became familiar and usable during the pandemic, will increasingly offer the food and wine tourist access to resources to find stimuli, know and decide in the phase preceding the trip and then share experiences on their return and increase their loyalty to the company visited, maintaining, and strengthening the relationship over time.

In the *before*, with the help of digital technology, the tourist will virtually visit the wineries, farms and other similar places to decide which ones are worth a direct visit. Instagram, with the take-off of Reels, will still acquire relevance and food and wine influencers, with chefs at the forefront, will become sources of inspiration for the choice of destination. The take-off of digital tasting, offered by the most far-sighted companies to exceed the limit of lockdowns, will establish a relationship before the visit, delivering the company's products directly to the virtual tourist's home and stimulating the desire for a subsequent "in presence".

The during will accelerate the change. The active approach of the food and wine tourist will be expressed in a new awareness of food and its contents, which we could define as intangible: traceability, sustainability, product ethics.

The visit will therefore become an educational

and communication moment on the company's values, which are affirmed as one of the reasons behind the purchase decisions and consumer loyalty. The visit will also be transformed from a one-way moment, according to the "I speak you listen" modality, to an opportunity for comparison and exchange through practices involving the tourist in an educational and fun way (*edutainment*).

In the *after*, the tourists conquered by the experience become ambassadors of the farms visited, sharing with friends and family the pictures and videos of what they saw and tasted (social effect), but also making them taste the products purchased online and sharing the experience with a digital tasting with a company ambassador, joining loyalty programs such as food/wine clubs, purchasing the products tasted in the company thanks to e-commerce.

Neverending food tourism is a trend destined to grow and companies and territories that want to intercept it will have to invest in digitalization: apps, augmented reality, e-commerce, funnels, discounts linked to tastings at home.

3

NEVERENDING FOOD TOURISM

ITALIANS ON THE ROAD

BEFORE

48% of Italian tourists believed that digital tastings can be useful before the site visit, because they help to prepare for the experience;

DURING

65% of Italian tourists would be more inclined to visit a production company when it can receive information during the visit about the techniques that the company adopt to impact less on the environment;

AFTER

50% of Italian tourists believe it can be interesting to participate in digital tastings after the experience on site, so that they can share with family and friends.



EXAMPLES



Lavazza Museum, Turin

Audio guide to the museum on Instagram with a radio-television speaker to guide the visitor through the exhibition itinerary.



Campari Gallery, Sesto San Giovanni (Milan)

Virtual meetings and 3D guided tours on the theme “Art and Mixology” led by an art historian of Galleria Campari and a bartender from Campari Academy.



Amazon Explore

Online section to buy private virtual tours, with personalized and digital experiences and travel sessions.



Arigato Food Tours Japan

Japanese tour operator offering digital experiences to discover the tea ceremony and Japanese food and wine culture before the trip.

4

NEW PLACES AND NEW SPACES



Smart working will encourage the relaunch of rural tourism in a leisure key, combining work and play. The small villages (whose recovery is included within the “Piano Nazionale di Ripresa e Resilienza”), which will have to build network projects to communicate their uniqueness, will develop as ideal places not only to live and work closely with nature, but also for networking activities. **What is better than being immersed in nature to make group business decisions or encourage aggregation?**

Wineries and farms will be able to equip themselves to host more events safely linked to companies, but they have another significant prospect of growth in daytime hiking, thanks to the rediscovery of proximity territories, triggered during the pandemic due to the restrictions of movement between regions. Here, for example, the growth of wine bars and restaurants in wineries or small events for the midweek after-work.

Hotels will have to invest resources to re-equip the spaces in a multifunctional vision, for a tourism of small groups that no longer loves imposing structures; gastronomy in the hotel will be able to experience a new season. Thanks to technologies, services can be redesigned, while we will see the typical product become, for example, a welcome gadget. The demand for thematic hotels and structures that are part of the glamping trend destined to further expansion is increasing.

In catering, the restart will benefit local cuisine

restaurants over gourmet ones, which will have to reduce their offer to contain costs in the absence of a large part of the international clientele. The success of the hybrid formats between in-person dining, delivery and take away will necessitate a review of the service formulas on the part of more traditional venues to remain in the market and offer a service in line with the times.

Digital tastings appear as a winning formula and will determine the need to invest in technological tools (latest generation microphones, advanced cameras and spaces to be used as recording studios) by companies and in particular by protection consortia, possible new hubs for the digital promotion of the territories to which they belong. **The creation of gastronomic hubs in the territories**, intended as information centers on possible activities (including cooking classes and guided tours), **will boost inbound tourism.**

The return of tourism in presence will see a more aware and mature food and wine tourist, in search of places and flavors' authenticity, with a significant growth potential for the historic premises of the cities as an obligatory stop during visits, similar to easily accessible monuments, as well as for the quality markets in urban centers, which will become more and more “caskets” of locally produced food and wine treasures.

4

NEW PLACES AND NEW SPACES

ITALIANS ON THE ROAD

47% believe the wineries are places to hold business meetings and company meetings, thanks to the amenity and relaxing atmosphere of the environment.

25% would like to stay in a glamping facility during their next food and wine holiday.

60% consider it interesting the possibility of finding a place that acts as an information center on food and wine tourism in the area.



Masseria Amastuola Wine Resort, Crispiano (Taranto)

Wine resort, ancient oil mill, but also vineyards resembling sea waves and olive trees like islands structured as if it were a painting by the landscape architect Fernando Caruncho.



Ceretto, San Cassiano (Cuneo)

After the union with contemporary art, the wine trekking route starts from the garden of the three Michelin star restaurant "Piazza Duomo", where chef Enrico Crippa goes personally every day to select and collect vegetables, herbs and flowers.



La Collina dei Ciliegi, Grezzana (Verona)

Wine cellar with wine hotel and the possibility of staying in a glamping tent on the terrace of the barrel cellar, as well as excursions on horseback or by bicycle and picnics in the vineyard.



WOW Porto, Portugal

A district that gathers six museums, including The Wine Experience and The Chocolate Experience, nine restaurants, exhibition spaces, shops and a school entirely dedicated to wine.

5 WELLBEING



Cloiseterd at home, with the family or alone, we had no more excuses for not taking care of ourselves. The desire to follow a healthy diet has grown, with food that has, therefore, become **a sort of "comforting good" to regain both a psychological and physical balance**. The effect of this transformation will continue in the coming years, when the **consumer will become more and more demanding and attentive**, placing their diet as one of the determining factors for the choice of an itinerary or a destination. Health has become today more precious than ever a good, to be protected, to be preserved, to be improved. **Holidays will increasingly become a central element and new possibilities are opening for rural businesses**.

Agri-food companies must be able to grasp the change, strengthening everything that is internally linked to the **values of well-being, which has become a mega trend**.

An innovative way for wineries could be to create alternatives to tasting-only visits and technical explanation of the production process (considered repetitive), also highlighting investments in sustainability and circular economy.

The approach of those who visit the rural areas has changed, the visit could also become **an opportunity to carry out regeneration activities**, recover mental well-being such as yoga courses in the vineyards and physical activities such as wine trekking.

The rural environment could become the ideal scenario to be guided in a wellbeing path, with the use of **tourist routes and products to regenerate and re-program one's habits**. The **olive oil companies** will become beauty farms, communicating the characteristics of the product and the benefits of extra virgin olive oil compared to lower quality oils. The possibility of making wine, beer and oil-based treatments and enjoying dedicated wellness centers affects half of Italian tourists and is a rapidly growing trend. The **farms** will be transformed into **iconic places** for animal welfare.

The **restaurants** will weave increasingly close relationship with local suppliers, becoming their ambassadors communicating the **traceability of products**, strategic choice to reassure customers about the quality of the dishes prepared.

The trip will become an opportunity to regenerate and reprogram one's habits; as a result, the pristine places will be rewarded because, as the principles underlying the Japanese Forest Bathing state, connection with the natural world relieves physical and mental stress.

And the food and wine journey become the perfect combination between the curative dimension of well-being linked to food and tourism.

5 WELLBEING

ITALIANS ON THE ROAD

65% pay much attention to nutrition, because it is a way to take care of themselves and to feel good;

53% would like there to be wellness centers / SPAs in olive oil companies to do oil-based treatments;

51% would like to benefit from wellness activities (e.g., massages, whirlpools, and SPAs) in the vineyards;

58% would like to find opportunities and activities in wineries, to regenerate and reprogram their habits, adopting a healthier lifestyle.



 **Olio&Benessere: alla scoperta degli effetti benefici dell'olio, Valdichiana Living (Siena)**

Route between oil mills, olive groves, bike and beauty farm with oil massages;

 **Parco del Respiro, Fai della Paganella (Trento)**
Forest Bathing following one of the four thematic paths to breathe the healthy air and the aromatic scents released by the beech trees.

 **Umbria Food Cluster - I Potti de Fratini, Piedicolle (Perugia)**
New project of a design oil mill that uses blockchain technology to guarantee product excellence and traceability of raw materials.

 **MAPPAE Project**
Twelve tourist itineraries on the route of medicinal herbs, from basil in Liguria, to lemons on the Amalfi Coast, to almond trees in bloom in the Valley of the Temples in Agrigento or the fragrant flowers in the apple orchards in Molise.

 **Cantina Château Smith Haut Lafitte, Martillac (France)**
In addition to being a place of wine production, hotel and restaurant, it hosts a wine themed SPA and offers their own line of beauty products, Caudalie. The pomace is processed to produce cosmetics, approaching zero waste in its productions.



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