



Wine tourism and COVID-19: impacts and responses from the Ronda-Málaga wine route's wineries

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ABSTRACT

Wine tourism is a subsector of gastronomic tourism that, according to the World Tourism Organisation, has been increasingly in demand among visitors worldwide. Spain is one of the three countries with the highest global wine production and has an outstanding wine-growing tradition, but the country has had to deal with one of the most significant challenges in recent times: the coronavirus disease-19 pandemic. This study analyzed the crisis's impacts on wine tourism along the Ronda and Malaga Wine Route, winemakers' perceptions of these effects, and how wineries reacted. Exploratory qualitative methods research was carried out using a combination of primary and secondary sources, identifying several strategies to tackle the crisis, such as online tastings or activities outdoors. The results were compared to other studies that have also sought to analyse wineries' recovery strategies associated with the pandemic showing that measures taken by wineries were similar to the ones used in other parts of the world and very similar to those applied in previous health crises. The results partly corroborate the trends identified by the UNWTO as no significant recovery was reported for the wine tourism sector. The findings have practical implications that can help wine tourism providers improve their resilience in extreme situations or future crises.

KEYWORDS

Wine tourism; coronavirus disease-19 (COVID-19); wine route; Spain; crises management.

RESUMEN

El enoturismo es un subsector del turismo gastronómico que, según la Organización Mundial del Turismo, cada vez tiene más demanda entre los visitantes de todo el mundo. España es uno de los tres países con mayor producción mundial de vino y cuenta con una destacada tradición vitivinícola, pero el país ha tenido que hacer frente a uno de los retos más importantes de los últimos tiempos: la pandemia del coronavirus enfermedad-19. Este estudio analizó las repercusiones de la crisis en el enoturismo a lo largo de la Ruta del Vino de Ronda y Málaga, las percepciones de los bodegueros sobre estos efectos y cómo reaccionaron las bodegas. Se realizó una investigación exploratoria con métodos cualitativos utilizando una combinación de fuentes primarias y secundarias, identificando varias estrategias para hacer frente a la crisis, como catas online o actividades al aire libre. Los resultados se compararon con otros estudios que también han tratado de analizar las estrategias de recuperación de las bodegas asociadas a la pandemia, mostrando que las medidas adoptadas por las bodegas fueron similares a las utilizadas en otras partes del mundo y muy parecidas a las aplicadas en crisis sanitarias anteriores. Los resultados corroboran en parte las tendencias identificadas por la OMT, ya que no se registró una recuperación significativa en el sector del enoturismo. Las conclusiones tienen implicaciones prácticas que pueden ayudar a los proveedores de enoturismo a mejorar su capacidad de recuperación en situaciones extremas o crisis futuras.

PALABRAS CLAVE

Enoturismo; enfermedad por coronavirus-19 (COVID-19); ruta del vino; España; gestión de crisis.

1. INTRODUCTION

The world is becoming increasingly complex, which makes human societies more prone to crises (Faulkner, 2001). Tourism is even more predisposed to disruption due to catastrophes than other industries as endogenous and exogenous factors make it highly vulnerable to crises (Cró & Martins, 2017). Various authors have pointed out that tourism activities show both great sensitivity to disasters and a remarked capacity for recovery (Gössling, Scott & Hall, 2020; McKercher & Chon, 2004). The existing academic literature includes many studies of crises in tourism due to the associated negative socioeconomic impacts (Okumus, Altinay & Arasli, 2005; Ritchie & Jiang, 2019). Ritchie (2004) observes that tourism's importance in many economies means destination managers need to understand which catastrophes can affect tourism activities and explore which strategies best stop or limit crises' negative impacts.

Given an increasingly globalized world, Ma et al. (2021) warn that urbanization promotes zoonotic disease transmission, and more pandemics should be expected in the future. The tourism industry relies on people's mobility and human relationships, so the coronavirus disease-19 (COVID-19) pandemic was a major turning point (Simancas, Hernández & Padrón., 2020) as it limited travel and forced the imposition of social distancing measures (Garibaldi & Pozzi, 2020). The present research was thus undertaken to examine the increasing risk of future pandemics and crises and related strategies' impacts on Serranía de Ronda wine tourism, as well as to address the gaps left by the few studies that have analyzed COVID-19's impacts on wine tourism (Kastenholz et al., 2022).

Wine tourism as a strategy to diversify non-agricultural activities can be expected to increase income from the primary activity. This approach bolsters the sustainability of wine farms (Kastenholz et al., 2023; Sun & Drakeman, 2022.; Drăgulănescu et al., 2020), enhances competitiveness in related sectors (Scorrano et al., 2019), and generates new job opportunities (Vazquez, Martín & Blanco, 2021). World Tourism Organization (UNWTO, 2017) highlights that many destinations have embarked on wine tourism around the globe, with Spain's wine routes initiative being one example. Starting in 2006, it promotes wine tourism in regions with a Protection Designation of Origin (PDO) to diversify tourism activities and reduce seasonality.

Therefore, this investigation focused on the pandemic's impact on Serranía de Ronda wineries and how they responded to the crisis. Another important goal was to check whether this area provides evidence aligned with the findings of recent studies that suggest that COVID-19 affected primarily urban destinations (Vaishar & Šťastná, 2022). There was an opportunity for tourism in rural areas considering the expected shift in tourists' preferences, aiming at low-tourist-density destinations (Marques, Guedes & Bento, 2022), the seaside or the mountains (Osti & Nava, 2020). Moreover, this study also aims to confirm or discard the trends identified by the World Tourism Organisation (WTO) (United Nations World Tourism Organisation, 2021) that may indicate a stronger recovery in rural tourism, nature tourism, outdoor experiences, and an increase in local tourism. The primary objective was, however, to analyze COVID-19's impact on wine tourism along the Ronda-Malaga Wine Route. To this end, an exploratory analysis was carried out using qualitative methods. The first phase involved calculating the year-on-year variation rates of wine tourism indicators between 2019 and 2021, while the second comprised conducting interviews with wineries on the pandemic's effects and the strategies implemented to deal with the crisis. Particular attention was paid to information technology's (IT) role in this context.

The remainder of this paper presents the conceptual framework developed regarding wine tourism, wine routes, tourism crises and COVID-19. The results are then detailed and discussed, placing the findings in the context of existing studies and suggesting future directions for research. The final section contains practical implications for wineries.

2. CONCEPTUAL FRAMEWORK: WINE TOURISM AND WINE ROUTES AS DEVELOPMENT STRATEGIES

In recent years, numerous authors have sought to define wine tourism more clearly (Carvalho, Barroco & Antunes, 2017). The earliest academic literature on this topic appeared in the 1990s in Australia and New Zealand. (López-Guzmán, Rodríguez & Viera, 2013). Since then, researchers have explored oenotourism's socioeconomic impact, sustainability, carbon emissions, supply lines, business

development, stakeholders and creation of wine tourism experiences, as well as wine tourists' behaviors and profiles (Salvado & Joukes, 2021).

Wine tourism's conceptualization has not been uniform or unequivocal as this sector can be analyzed from multiple perspectives (López-Guzmán et al., 2013; Marcos & Arnandis, 2014). From a marketing standpoint, Hall and Mitchel (2000) consider wine tourism to be the experience of visiting vineyards and wineries and attending wine festivals and demonstrations in which wine tasting and/or experiences of wine attributes are the main draw for visitors. The UNWTO (2019) adopted this definition and classified wine tourism as a subsector of food tourism.

Getz and Brown (2006), however, assert that wine tourism refers to consumer behavior, so this form of tourism combines cultures, lifestyles and regions. This approach serves as a development strategy for specific geographical areas and their wine market and represents opportunities for wineries to promote and sell their products directly to consumers. The literature indicates a growing consensus that wine tourism tends to be a sustainable growth model capable of boosting destinations' competitiveness and improving local communities quality of life (Marcos & Arnandis, 2014). Overall, definitions of wine tourism can be grouped into three main approaches (Orden Reyes, 2012): a) a search for new experiences, b) a territorial development strategy and c) wineries' marketing role in wine tourists' activities.

Wine tourism's increasing popularity can be explained by two factors, namely, the greater availability of leisure time and a growing appreciation of local gastronomic features (Medina, Serrano & Tresserras, 2011). Researchers such as Boniface (2003) and Leal (2013) have suggested that gastronomic tourism is an expression of post-modern societies and a reaction to industrialisation and McDonaldisation as this sector appeals to those who value local, traditional and authentic experiences lived through agri-food products. In this vein, the UNWTO and the Basque Culinary Center (2019) report that a new type of tourist has emerged whose primary motivation is getting to know and enjoying their destination's culinary culture. These visitors demand and value authenticity and reject artificial uniformity.

The current boom in gastronomic tourism is justified because it plays an essential role in increasing tourism destinations' attractiveness and thus tourists' spending. This sector improves visitors' experiences, reinforces local identity, stimulates other

sectors' growth and becomes a viable alternative to other more widely exploited markets such as "sun and beach". In short, gastronomic tourism promotes destinations' ability to achieve sustainable competitiveness (Dixit, 2021). Developing wine tourism can contribute to rural populations remaining in their traditional locales, local economic growth and more diversified jobs (López, 2010).

Wine and food tourism's positive effect on local development has attracted the attention of academia, destination-marketing policymakers and strategists (Leal, 2013). European countries, in particular, have made an especially intensive effort to promote wine products through wine tourism by creating the European Network of Wine Cities (De Jesús-Contreras, Thomé-Ortiz & Medina, 2020). Since 2006, Spain has been working on the Spanish Wine Routes (SWR) project, whose purpose is to create public-private cooperation networks to promote wine tourism with Spanish PDO to diversify and de-seasonalise tourism activities. These wine routes have been formed to boost regions' economic dynamism (Andreu & Verdú, 2012), and these routes are now among the best-known tactics for developing wine tourism through unique, genuine products (Marcos & Arnandis, 2014) in urban and rural areas where indigenous wine culture still survives (López, 2010).

In this regard, the Spanish Ministry of Tourism (2000) defines wine routes as:

"The integration under the same thematic concept of the [relevant] resources and tourist services . . . , [whether] existing and potential, of a wine-growing area, based on authenticity and experiential vocation, to build a product, to facilitate the joint marketing of the whole area and to guarantee the [optimum] level of satisfaction of the demand, thus promoting the integral [socio]economic . . . development of the area."

Elías (2006) subscribes to this definition of oenological routes, which is similar to Italian legislation on this matter. Mitchell and Hall (2006) expanded this conceptualisation further by defining wine routes as duly signposted itineraries in a geographical area where wineries are the star product, complemented by monuments or other cultural features of interest to visitors. According to Cloutier, Renard & Arcand (2019), a wine route is a complex dynamic system comprising public and private stakeholders involved in a coordination process. This strategy comprises the enhancement of a combination of activities and attractions and encouragement of cooperation between different sectors (Briedenhann & Wickens,

2004), which thus provides a solid basis for specific regions' economic development (Bortoló & Forné, 2016).

3. STATE OF THE ART: WINE TOURISM AND COVID-19

Tourism is quite vulnerable to crises (Cró & Martins, 2017) and the industry has gone through many of them (Ritchie, 2004). Under the paradigm of complexity theory, McKercher and Prideaux (2020) noted that tourism is an open-ended, complex system not immune from global events. War, terrorism, natural disasters or diseases (Faulkner, 2001; Mair, Ritchie & Walters, 2016) can occur rapidly and without warning and plunge the tourism industry into uncertainty. In this case, wine tourism is not an exception, and several scholarly works highlight this aspect. For instance, Gergaud, Livat & Song (2018) assessed the impact of the wave of terror in France in 2015 on wine tourism.

The literature related to this pandemic's impact on mobility and tourism has been noticeably expanding in recent months (Viana-Lora, Domènech & Gutiérrez, 2021) and addressing multiple issues. A broader perspective is provided by Sigala's (2020) overview of the type and scale of COVID-19's effects on tourism and their implications for tourism research. Gössling et al. (2020) more specifically compared COVID-19's impacts with those of previous global crises and explored how this pandemic may change tourism. On a European scale, Plizáková and Smeral (2022) analyzed COVID-19's effects on tourism demand in the Eurozone and developed a predictive model. Duro, Perez-Laborda, Turrion-Prat & Fernández Fernández (2021) focused more closely on Spain and proposed a COVID-19 vulnerability index for Spanish provinces; the province of Malaga, which includes the Serrania de Ronda, was ranked sixth due to its high tourist density and heavy reliance on international tourism.

Researchers have also examined destinations' reactions to the pandemic. Palomo, Navarro & Cerezo (2020) analyzed various European regions' recovery strategies to identify whether this crisis has promoted a tourism model aligned with theories of degrowth. A consensus has emerged in academia that the pandemic has offered an opportunity to rethink tourism differently and to move towards a more sustainable model (Romagosa, 2020). More specifically, Viana-Lora et al. (2021)

report that recently published studies have focused on issues such as short-distance and proximity tourism, increases in visits to natural and rural areas and decreases in visitors to overcrowded urban destinations. However, the existing research has yet to provide specific details on how these phenomena have been shaped by different regional contexts.

The present literature review also included prior analyses of COVID-19's effect on wine tourism. Kastenholz et al. (2022) examined how the pandemic affected two Portuguese wine routes, finding that the impacts and corresponding strategies depended on the stage in the crisis, interviewees' age and gender (i.e. older men perceived more impacts than younger ones did) and regional setting. For example, those involved in routes with less tourism development perceived the effects as less severe. In wineries hosting tourism activities, participants' perceptions were more negative and emotional compared to individuals in facilities that did not participate in wine tourism. Kastenholz et al.'s (2022) study revealed a deficient level of preparedness for the crisis, while the measures taken were hygiene, social distancing, temporary closure and more intensive use of digital promotion and distribution.

Concerning COVID-19, Niklas, Guedes, Back, Rebelo & Laurie (2022) analyzed its effects on wine tourism from a winery perspective based on a sample of 228 wineries. Their results exhibit geographically asymmetric effects as New World wineries are more likely to perceive the pandemic's impact than Old World wineries. They investigated whether the rural nature of wine tourism has continued to play in its favour due to its relative ease of outdoor activities and social distancing.

Moreover, Seccia and Garibaldi (2021) explored the COVID-19 crisis's effects on Italian wine tourism based on a 2020 survey of 262 wineries and found that the sector had reacted by investing in relevant technologies and creating outdoor experiences in vineyards. The cited authors' results include that 87% of the wineries reported that the pandemic had significantly affected them. For 91% of the sample, sales and distribution shrank the most dramatically due to restrictions on direct sales and the closure of the hotel, restaurant and catering businesses, and, for 84%, wine tourism activities were also affected. Seccia and Garibaldi (2021) further observed that the Italian wine tourism industry rapidly digitized its offer and adapted to e-commerce channels. Overall, digitalization has accelerated the use of online sales,

digital wine tastings and live wine-pairing events via social media in the Italian sector (Seccia & Garibaldi, 2021).

In addition, COVID-19's impact on the most popular destinations' wine tourism was studied based on data gathered by an online survey in the summer of 2020 from 200 wineries worldwide (Garibaldi, 2021). It confirmed that wine tourism services have registered higher losses than other winery activities. Garibaldi found that e-commerce was the main strategy implemented to compensate for the loss of wine tourists. The survey's results indicate that one-third of the sample conducted digital wine tastings and that 44% of these wineries expected wine tourism to recover within six months to one year.

Given the mobility constraints associated with the pandemic, studies have analyzed technology's use as a tool to help tourism businesses and destinations adapt. For instance, Garibaldi and Pozzi (2020) provide evidence of IT applications that create tourism experiences at home (e.g. online cooking sessions, live guided tastings and virtual reality tours). Szolnoki, Lueke, Tafel, Blass, Ridoff & Nilsson (2021) investigated the reasons for offering online wine tastings, as well as their cost-effectiveness, essential characteristics and prospects, and concluded that the pandemic accelerated these tastings' implementations. They verified that a positive relationship exists between wineries' size and the number of online wine tastings they conducted, with these tastings proving to be an excellent way to cope with declining sales. In this vein, Szolnoki et al.'s (2021) results indicate that most wineries were considering continuing to conduct online tastings. Finally, Wen and Leung (2021) explored virtual wine tours' influence on young consumers' sensory experiences and purchasing behaviour, finding that virtual reality videos on wine tourism evoked higher purchase intentions and willingness to pay than traditional videos do and that the former videos are more highly valued by tourists with a more refined knowledge of wine.

4. MATERIALS AND METHODS

Serranía de Ronda in Spain is a wine-growing region with diverse soil, altitude, and climatic conditions, making it ideal for producing wines with a unique personality (Nieto Gonzalez, 2010). It is part of the threefold PDO quality seal of Málaga, Sierras

de Málaga, and Pasas de Málaga wines. According to a study by Turismo y Planificación Costa del Sol (2020), Serranía de Ronda has 19 wineries in the Sierras de Málaga PDO. Nieto (2010) analyzed wine tourism in the Serranía de Ronda and found that the long tradition of wine and its important place in the area's economy has existed for more than two thousand years. Coins with images of grapes have been dated to 447-444 before the Christian Era, and amphorae that carried wine have been found in the local Roman ruins of Acinipo. The City of Ronda's Municipal Ordinances from 1568 regulated the wages of grape cutters, grape carriers and treaders. The Cuaderno de Viñeros of 1819 described significant wine production in Ronda and Arriate, where 591 winegrowers generated more than 600,000 litres of wine from vineyards spread over 854 hectares. This economic activity's importance was suddenly truncated by the outbreak of phylloxera at the end of the nineteenth century, which led to the loss of 99% of the vineyards in the Serranía de Ronda (Pérez, 2022) (i.e. more than 13,000 hectares).

The beginning of the twenty-first century marked a turning point. Since then, updated plantations have been established, with plant densities ranging from 4,300 to 5,000 plants per hectare, which are primarily organic thanks to new local and foreign winegrowers' efforts to rewrite the ongoing history of Ronda wines. Clavijo (2010) reports that:

“Wine-growing practices in the region are moving towards mixing] the winegrower and the winemaker in the same person, so winery work is no longer an industrial process, but an artisanal one, where each winegrower gives the wine its characteristics reflecting the peculiarities of the soil. In this way, wineries . . . [offer] a product of the highest quality with an identity different from the [rest of the] market.” (p. 44)

The region's wine sector currently occupies around 200 hectares, producing around 800,000 kilos of grapes and half a million bottles each season. Winemaking generates around a hundred permanent jobs – a figure that triples at harvest time – and its overall turnover is around 16 million euros (€) a year according to figures published by the Spanish Ministry of Farming, Fishing and Rural Development (2023).

In 2013, the Ronda and Malaga Wine Route was certified as an official Spanish Wine Route (SWR), at which time a comprehensive wine tourism strategy was

implemented using the tourism products club model. According to Salvado and Joukes (2021), this route constitutes a complex wine tourism ecosystem that connects different types of actors with diverse values, interests, practices, skills, resources and ideas. Hall and Mitchell's (2002) vision of wine tourism has taken shape in the Serranía de Ronda as the combination of wine and tourism is used as a development tool that integrates all economic sectors (i.e. agriculture, food industry and services), to which the local terroir's uniqueness adds value.

The present exploratory research used two sources of data (i.e., primary and secondary) to analyze the pandemic's impacts on Serranía de Ronda wineries that belong to the Ronda-Malaga Wine Route. The methodology included calculating interannual variation rates with data drawn from reports on winery and wine museum visitors. These compilations present information on the demand for visits to these two types of facilities (ACEVIN, 2020, 2021), in the Spanish Wine Routes (SWR), namely a) annual and monthly evolution of wine tourist flows, b) average prices of visits, c) visitor's average expenditure per shop, d) percentage of visitors by origin and e) approximations of wine tourism's economic impact. All SWR companies collaborate by collecting data on visits to make these reports possible.

Given this study's exploratory nature, interviews were selected as an appropriate way to gain an in-depth understanding of the specific research population in question (Barrett & Twycross, 2018) as prior studies have relied on qualitative methods to examine areas about which little knowledge exists (Mohajan, 2018). The qualitative approach chosen was expected to complement the existing information on wine tourism demand and provide a more accurate understanding of wineries' experiences, perceptions and future intentions as they reacted to an unprecedented crisis and uncertain economic environment (Kastenholz et al., 2022). Interviews have often been used in tourism research, for example, to examine actors' perceptions of film tourism's impacts (Thelen, Kim & Scherer, 2020), to address the conflicts generated by tourism's growth (Romero-Padilla, Cerezo-Medina, Navarro-Jurado & Romero-Martínez, 2019) or, in the case of wine tourism, to explore wine routes' contributions to regions' internal organization (Marcos & Arnandis, 2014). The qualitative methodology selected has also been used in COVID-19-related studies. For instance, Ballesteros-Bejarano, González-Calzadilla, Ramón-Jerónimo & Flórez-

López. (2022) conducted longitudinal interviews to explore tourism entrepreneurs' responses during the pandemic's various waves in Zhangjiajie, China.

In the present research, a semi-structured interview script was designed regarding the SWR reports' variables and the emerging themes identified by Garibaldi (2021) and Szolnoki et al. (2021). Interviews were conducted in Serranía de Ronda wineries between May and June 2021. Each interview included open-ended questions to elucidate COVID-19's socioeconomic impacts and uses of IT – or intentions to use it – as a pandemic recovery mechanism.

Population	Nineteen wineries in the Serranía de Ronda
Sample interviewed	Nine wineries
Criterion to be part of the sample	Wineries integrated into a specific Spanish wine route
Date of interviews	From 19 May to 6 June 2021

Table 1. Technical description of research

Coronavirus disease-19's (COVID-19) impacts	How much have wine tourism visits decreased since the pandemic? Have you had to cancel scheduled events? How has wine tourists' profile changed? How has wine tourists' behaviour changed? Have you had to lay off workers?
Strategies implemented to deal with COVID-19	Has your pricing strategy changed because of COVID-19? How has this strategy reinvented itself? Have you had to adapt the winery for COVID-19? Have you received any financial assistance from the government? Have you felt supported by the public administration's policies? Has COVID-19 increased your level of activity in social media?

	How could COVID-19 contribute to improving your sector?
Online tastings	Did you offer online wine tastings during the pandemic? If not, why not? Do you plan to offer them in the future? What would be/are your reasons for offering wine tastings online?

Table 2. Interview guide

After the interview guide had been created, the interviewees were selected. Given the wineries' heterogeneity, companies with different characteristics were included, such as year of foundation, size and hectares of vineyards. This study focused on wineries that regularly offer wine tourism activities and were integrated into the Ronda-Malaga Wine Route, given that not all the wineries providing tourism services meet similar standards nor supply them in an identifiable way over time. Henceforth, focusing on a group of firms who were clearly engaged in such activities before and after the pandemics, and whose information could be accessible, was key for this research. In this vein, Table 3 shows the wineries and interviewees' profiles.

Winery	Year of foundation	Hectares of vineyards	Number of permanent employees	Number of casual workers	Position of interviewee
Lunares Winery	2005	n/a	5	n/a	Manager and winemaker
F. Schatz	1982	n/a	n/a	1	Manager
Badman Wines	2016	1	1	n/a	Manager and winemaker
Gonzalo Beltrán Winery	2004	5	1	n/a	Winemaker
Cezar	1989	1.5	n/a	n/a	Winemaker

Vineyards and Winery					
La Melonera	2006	n/a	n/a	0	Winemaker
Winery					
Castillo de Ronda	2012	1.5	1	1–10	Manager
Kieninger Winery					
Viloria Winery	2000	3.2	n/a	5	Manager
Viloria Winery	2003	5	n/a	8–12	Manager and winemaker

Table 3. Information gathered on interviewees and wineries. Note. n/a = information not available.

5. RESULTS

5.1) CHARACTERISATION OF INTERVIEWED WINERIES

The wineries in the sample have vineyards planted on less than 50 hectares, which means that they are small holdings and follow traditional winemaking methods. Export activity is low with only six wineries exporting less than 10% of their wine, mainly to regional markets. Only two wineries export more than 40% of their wine. The oldest winery has been producing wine for 40 years, while the youngest was founded in 2016. The study highlights the cooperative nature of the wineries as all of them are members of professional or winegrowers' associations. Six of them work with accommodation establishments in the Serranía de Ronda, five with restaurants, and seven collaborate with tourist guides. The wineries offered guided tours of their vineyards and winery, wine tasting, tasting services and direct sales of wine to visitors. Half of these facilities organized events and wine pairings experiences. A third of the wineries also provided accommodation services, while only one facility provided introductory wine-tasting courses and active tourism experiences. Before the pandemic, all nine wineries offered weekend wine tourism activities although the season was limited to spring and autumn.

Seventy-five per cent of the facilities' activities had a minimum duration of 90 minutes. The most common language used during visits was English (90%), followed by Spanish (77.8%). The average price of winery visits was €26.1, while the average amount spent by wine tourists buying wine was 23.82€.

The wine tourists' most common age group was between 35 and 50 years old, although, in two of the wineries, visitors tended to be between 50 and 60 years old. The winery visitors were classified using Charters and Ali-Knight's (2002) categories. In five wineries, the predominant profile was 'wine interested'. In two wineries, the most common were 'wine connoisseurs', and the largest number in the remaining two were 'wine lovers'. In two-thirds of the wineries, wine tourists were mostly international (i.e. more than 60%), while, in the remaining third, they were from Spain.

Small vineyards (4 hectares on average)	
Winery work is artisanal	
Low export activity	
Young wineries	
Associative and cooperative wineries	
Guided tours, wine tasting, tasting services and direct sales.	- average duration of 90 minutes - most common language used: English and Spanish.
Average price of winery visits	26.1 €
Average expenditure on wine tourists buying wine	23.82€
The Month of highest visitors: October	The month of lowest visitors: January

Table 4. Characterisation of interviewed wineries and their wine tourism activities

5.2. COVID-19'S IMPACTS ON WINE TOURISM ALONG THE RONDA AND MALAGA WINE ROUTE

5.2.1 Report on visitors to wineries

According to ACEVIN's data (ACEVIN, 2021), the number of visitors to the Ronda-Malaga Route wineries fell by 87.4% in 2020 compared to 2019. In absolute

terms, the drop in wine tourists exceeded twenty thousand, placing it second on the list of SWR most affected by the pandemic, thereby reversing the steady growth trend before the COVID-19 pandemic. In 2021, visitors to wineries in Ronda-Málaga increased over 2020 (204.74%), but the data still shows a more than 27% loss compared to 2019.

Year	Visitors to wineries	Variation rate	
2022	16,924	2022-2021	92.42%
2021	8,795	2021-2020	204.74%
2020	2,886	2020-2019	-87.44%
2019	22,993		

Table 5. COVID-19's impacts on wine Visitors to Ronda-Malaga Route

In 2020 the months with the highest number of visitors were July and August when mobility restrictions were relaxed. In 2018 and 2019 the months with the largest number of tourists were April and September while in 2022 was December, which means that wine tourism's seasonality varied significantly from the norm and coincided with the pandemic's waves.

The Ronda-Malaga Route registered the highest proportion of international visitors (30.9%) of all SWR in 2020 – triple the average value (8.8%). The 2020 figures were almost half that of 2019 (54.1%). The international market did not recover as only 7.39% of winery tourists were from abroad in 2021 and 23.2% in 2022.

ACEVIN (ACEVIN, 2021) used the number of visitors to wineries, the average price per visit and wine tourists' wine purchases to approximate the economic impact on SWR, which was more than €23.5 million in 2020 or a decrease of 72.5% in revenues compared to 2019. The effects on the Ronda-Malaga Route were even higher because direct revenues fell from €974,000 in 2019 to €112,000 in 2020 or a decrease of 88.4%. In 2021, revenues recovered to reach €400,000, but this figure was still 58% lower than that of 2019.

5.2.2 Wineries' perceptions

The interviews also focused on the wineries' perceptions of the pandemic's financial impact. Except for one winery, all were forced to cancel events. Interviewed wineries reported that the number of visitors dropped by over 48.88% on average, so

there is a discrepancy between ACEVIN data and the wineries' perceptions. Hence, the sampled firms, certainly smaller than in other destinations, perceived a slightly shorter visitor decrease than the average national shortage reported by ACEVIN, whose survey's scope covers almost the entire wine tourism industry in Spain, and therefore including larger companies.

	ACEVIN	Interviewed wineries
2021-2019	-61.74%	-48.88%

Table 6. The decline of wine visitors to the Ronda-Malaga Route versus those perceived in the interviewed wineries.

Wineries report fewer visitors over 60 and a drop in average age by 6 to 10 years. Four wineries have fewer than 10% international tourists while others estimate 10%-50%.

The respondents had mixed views on average expenditure per visitor. Four said it remained the same, three felt it decreased, and two saw it slightly higher. Five wineries didn't lay off any workers, two had temporary layoffs, and the rest had to make employees redundant.

5.3) WINERIES' REACTION TO THE PANDEMIC CRISIS

This research applied Faulkner's (2001) framework for tourism disaster management to the data gathered in interviews from May to June 2021. The nine wineries' strategies can be categorized as falling between the intermediate and long-term recovery phases, that is when the most urgent needs have been dealt with and an attempt is made to return to normality as quickly as possible. The reactions of the wineries can be summarized as follows:

- The wineries relocated their *wine tourism experiences* to outdoor areas. Only one facility reported having redesigned its wine tourism products in response to changes in demand.
- The maximum visitor *capacity* was also reduced to comply with COVID-19 hygiene and safety regulations.
- On average, every company covered an upfront cost of €1,200 in safety equipment, disinfection products and modifications of installations. An additional average monthly investment of €100 was also necessary.
- Seven wineries maintained their *prices*, one reduced them and one increased them.

- Seven wineries received *financial support* (i.e. €50,000) from the government to help them cope with the health crisis's effects, but only three felt that the government had adequately supported the sector.
- Regarding IT's role, three wineries reported that they had designed a new website to *promote* the direct online sales of their wines. Five added that they had increased their use of social media and interactions with Internet users (i.e. via Instagram and Facebook) as attending specialized trade fairs was impossible.
- None offered *online wine tastings*, referring to a lack of time and/or staff, insufficient demand or a poor fit for their winery's philosophy. Two-thirds of the interviewees were, however, considering offering digital wine tastings in the future to increase brand awareness and online sales and strengthen consumer loyalty.

After implementing these measures, the wineries perceived their level of security against contagion as improved, and their wine tourists observed the established safety measures.

The wineries had varying expectations of a full recovery, with five wineries estimating that they would need one to two years to return to pre-pandemic levels of activities and revenues. The rest were more optimistic as they envisioned a recovery timeframe of fewer than six months. The interviewees had a positive attitude regarding how the health crisis would affect wine tourism in the Serranía de Ronda since – except one winery – all asserted that the region's wine tourism would be strengthened because of tourist flows changing to rural areas, natural environments, open-air spaces and local destinations.

6. DISCUSSION

None of the wineries in the region was set up with wine tourism in mind, but these activities have proven to be an excellent opportunity to promote these facilities' products (Nieto, 2010), which explains why, since 2013, 60% of the wineries in the area under study have joined the Ronda-Malaga Wine Route. This rate and the wineries' membership in professional associations means wineries and other stakeholders extensively cooperate throughout the region.

The ACEVIN report (2021) shows a dramatic drop of 87.4% in visitors to wineries in 2020. However, the interviewees reported a less pronounced decline, which is

closer to Garibaldi's (2021) and Szolnoki et al.'s (2021) findings. The wineries' level of optimism is lower than that found by Garibaldi (2021), that is, half of the interviewees expected to receive the usual number of wine tourists within six to 12 months. In contrast, 55% of the wineries in the present research expected a full recovery within one to two years, a fact that definitely has not been reached yet in 2022. These results are aligned with the findings of Niklas et al. (2022) as the adverse perceived effects of COVID-19 on wineries are higher in those most dependent on international visitors and wine tourism sales on the winery's business. The current trends indicate visitors are returning to wineries, but the international market is still far from the numbers before the pandemic.

The measures taken by the wineries in response to the health crisis are similar to the strategies reported by Garibaldi (2021), Kastenholz et al. (2022) and Szolnoki et al. (2021). Online wine sales are the principal tactic used to compensate for the loss of wine tourists. The present results differ from prior studies of wineries' approach to overcoming COVID-19 lockdowns and restrictions on mobility in that none of the facilities offered online wine tastings despite this strategy's low level of risk and investment. The interviewees gave similar reasons for not providing online tastings (i.e. a lack of time and staff and perceived insufficient demand). This strategy thus represents an opportunity for these wineries given that 80% of them have not yet offered online tastings but they may consider doing so in the future. Online wine tasting has proven to be an excellent way to counteract declining sales, and this tactic appears to be profitable because more than half of wineries that provide online wine tastings rated these as profitable or very profitable (Szolnoki et al., 2021).

A positive association exists between wineries' optimism and dimensions such as perceived government support or efforts to reinvent themselves to cope with the pandemic. Those wineries that reported feeling adequately taken care of by the government and have developed ways to overcome losses felt that recovery would be faster. These factors could explain the discrepancy (12,86%) between ACEVIN data and wineries reported regarding the decrease in visitor numbers. The measures taken to deal with the pandemic's impacts (i.e. capacity reduction, social distance restrictions and online promotion and distribution) are similar to those reported in other health crises affecting tourism in the past (Kastenholz et al., 2022). The current interviewees' responses also suggest a similarly low level of preparedness for the

COVID-19 crisis as the strategies implemented were reactive and urgent and took place in the intermediate and long-term recovery phases once containment measures were lifted.

The narratives analyzed highlight a weakness in terms of a perceived lack of institutional support for the wineries. They felt isolated and suggested more assistance was needed to increase digitalization and promote local products, without neglecting essential long-term aspects of these facilities' rural environment. For example, the interviewees suggested improving urban planning to expand farms, increasing accessibility to wineries and facilitating daily farming operations with better road surfaces and cattle tracks. These sentiments were shared by the Portuguese wineries included in Kastenholz et al.'s (2022) research, which also reportedly felt neglected and disillusioned by the lack of local and national guidance and assistance.

The inadequate institutional support mentioned by wineries contrasts with the actual financial aid and publication of recovery guides during the de-escalation of COVID-19 restrictions. In May 2020, the SWR project and ACEVIN published a manual for how to reactivate wine tourism, providing guidelines and recommendations for the post-COVID period (ACEVIN, 2020). A month later, ACEVIN and the Institute for Spanish Tourism Quality published a protocol for wineries to minimize the risks of infection after reopening (Instituto para la Calidad Turística Española, 2020), which specifies the requirements for risk management, services, amenities, cleaning practices and disinfection. The latter protocol became the Safe Tourism certified quality label for tourism organizations interested in certification, having met the Spanish Association for Standardization's specifications for preventing COVID-19 infections. The label was created to regain tourists' trust by instituting a health risk prevention system. The requirements include a contingency plan, measures for informing employees and tourists, standards for cleaning, disinfecting, heating, ventilating and air conditioning facilities, and redesigning tours and related activities. Notably, the Safe Tourism label had been given to only two wineries in Spain at the time of the present study.

This investigation sought to address the gaps in empirical research clarifying how features such as proximity tourism or rural and natural areas' prominence have been reproduced in regional contexts in response to COVID-19 (Viana-Lora et al., 2021).

To this end, this research was undertaken to cover the first four COVID-19 outbreak waves and get the overall experience level of lockdown measures. In contrast with recent studies, the findings do not show a scenario of increased tourism in a wine tourism destination located in a rural area (Marques et al., 2022; Osti & Nava, 2020; Vaishar & Štastná, 2022). The current results partly corroborate the trends identified by the UNWTO (2021) as outdoor experiences and short-distance tourism have increased in the Serranía de Ronda region, but no significant recovery was reported for the wine tourism sector. Concurrently, the loss of wine tourists in the area exceeded forecasts of COVID-19's impacts on the province of Malaga, which predicted that inland regions would be the least affected as they have the best chance of guaranteeing healthy environments and being the least overcrowded (Palomo, Navarro, Cerezo & Torres, 2020). An explanation for the worse-than-expected outcomes can be found in the region's high level of vulnerability to COVID-19, which Duro et al. (2021) report is a bigger problem in Mediterranean coastal provinces. This greater exposure is affected by factors such as the larger numbers of international tourists, seasonality, tourism intensity and density and incidences of COVID-19.

6.1) PRACTICAL IMPLICATIONS

Measures taken by the wineries under study are similar to tactics used in other parts of the world, which have been applied in previous health crises. Given the above results, managerial implications can be inferred for wineries to face health threats or other extreme situations. First, this sector needs to implement new strategies to minimize future risks, such as implementing rigorous safety measures, paying more attention to domestic tourists (Gössling et al., 2020) and nearby international destinations connected by road, promoting rural accommodations, reducing seasonality and rethinking traditional tourism models (Palomo et al., 2020). In short, wineries must reduce their vulnerability to crises since, according to Kastenholz et al. (2022), the COVID-19 pandemic caused sudden, unexpected situations that contributed to reduced demand for wine tourism. Building greater resilience has long been discussed as a necessary step towards achieving sustainability.

Wineries in the study area thus need to take the current findings into account in combination with the previously demonstrated profitability of online tastings (Szolnoki

et al., 2021) and use these experiences to attract potential customers -both wine tourists and buyers-, to reinforce customer loyalty and increase brand awareness. Wineries should also be more proactive and develop crisis management plans given the Intergovernmental Platform on Biodiversity and Ecosystem Services's warnings about the increased likelihood of pandemics in the future. Tourism providers have to be pre-emptive in their responses, and destinations must coordinate public and private stakeholders to manage crises as a way to increase their positive impacts and decrease negative ones. These plans could be developed as part of the Safe Tourism label or the SWR project's co-opetition framework.

According to Seccia and Garibaldi (2021), the revival of wine tourism depends on technological and organizational innovation as a pathway to achieve sustainable development, which is one of the primary goals of the European Charter for Wine Tourism.

Although the COVID-19 pandemic has lost its prominence and the World Health Organization declared the pandemic over, we cannot forget its unprecedented severity in tourism, and we need to raise awareness that tourism is an open and complex system guided by rules of complexity theory and can become chaotic (McKercher & Priedeaux, 2020), therefore, it is essential to continue analyzing similar crises regarding effects and planning to improve the resilience of tourism stakeholders.

7. CONCLUSIONS

Tourism is a highly resilient global industry (Gössling et al., 2020; McKercher & Chon, 2004) that plays a vital socio-economic role in many regions, but tourism is also extremely vulnerable to shocks (Cró & Martins, 2017). These features in combination with forecasts of more pandemics to come (Ma et al., 2021) underline the need for more research on how the wine tourism sector has been affected by COVID-19 and other pandemics in many complex ways.

The present study examined secondary and primary data on COVID-19's impacts on one SWR and its wineries' reactions to this crisis. Wineries' perceptions and visitor data reflect an unprecedented decline in wine tourists that compares unfavourably with other countries. The results do not confirm the recovery trends

outlined by the UNWTO (2021) and recent studies (Marques et al., 2022; Osti & Nava, 2020; Vaishar & Šťastná, 2022), even though the Serranía de Ronda is a rural destination offering outdoor activities. This finding could be explained by various factors that increased this area's vulnerability to COVID-19.

Because of COVID-19, the European Union has adopted a new industrial strategy to improve competitiveness. To this end, the European Commission (2022) created a roadmap based on ecological and digital transitions to improve tourism ecosystems' long-term buoyancy. The present results reaffirm the IT's essential role in reducing crises' negative impacts. IT contributed to digitalization during the pandemic and proved to be a valuable tool for innovation, resilience and internationalization (Sigala, 2020). Hence, wineries should foster the adoption of IT that can generate new opportunities by facilitating tourists' access to information and co-creating new real and virtual experiences available at home, thereby maintaining provider-customer relationships and generating the stimulus for future visits – even during confinements (Garibaldi & Pozzi, 2020).

The present research had various limitations. The analyses focused on the pandemic's impact on wine tourism in a specific region of Spain and compared the results with previous studies of wineries, by conducting interviews in the first half of 2021. Further comparisons with other wine tourism regions could provide additional insights into environmental variables' role in future crises. This study focused on COVID-19's effects from a supply-side perspective, so explorations of demand (i.e. wine tourists' purchase intentions, satisfaction and loyalty) would help to increase wineries' preparedness for future extreme situations. The research provides a snapshot of the area, so longitudinal studies are needed to show how wine tourism providers' responses evolve in future crises and to generate strategic knowledge for wineries. Finally, surveys could be conducted of a larger sample of wineries to analyze possible associations and relationships between variables that may explain these facilities' perceptions and responses to other pandemics.

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