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Wein und Tourismus

Eine Wertschöpfungspartnerschaft
zur Förderung regionaler Wirtschaftskreisläufe

Wine and tourism

A value-added partnership
for promoting regional economic cycles

Lena-Marie Lun, Axel Dreyer, Harald Pechlaner, Günter Schamel (eds.)

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Wine Tourism in Morocco? Tentative approaches, challenges and perspectives

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Abstract

For the last couple of years, Morocco has been endeavouring to broaden its tourism basis and diversify its products. Since winegrowing is wide spread in the northern part of the country, this article focuses on the potential of using wine as a further complementary element of the tourism product portfolio. However, a closer look at the situation during a fact-finding mission in spring 2013 revealed that approaches in this direction are in their infancy and that structural aspects prevent the more comprehensive integration of viticulture into the tourism industry.

Keywords

Wine tourism, Morocco

Introduction

Morocco has been a traditional tourism destination on the southern shore of the Mediterranean Sea for a long time. In the past decade, the country actively endeavoured to intensify and diversify its tourism offer. New segments of tourism products were developed and attempts were made to stimulate tourism development in parts of the country that had not yet been exploited for tourism purposes.

Since the northern part of the country has a Mediterranean climate, wine is cultivated in several regions. We therefore asked ourselves whether viticulture could be added to the tourism portfolio, enriching it.

In spring 2013, the authors went on a fact-finding mission to the Mediterranean part of Morocco. The aim of the mission was to determine whether there were any initiatives that seek to approach wine tourism and, at the same time, to analyse future potentials and constraints of a more comprehensive integration of wine tourism into the tourism product portfolio.

Development of tourism in Morocco

Although the first initiatives to establish a tourism offer date back to the time of the French Protectorate (cf. Kagermeier, 2012), it was not before the country's independence in 1956 that a systematic development was promoted by the state. This occurred in the 1960s and 1970s. Emphasis was placed on three pillars:

- 1) **Beach tourism**, especially in Agadir on the Atlantic coast, but also in a number of smaller resorts around Tanger, Tetouan and Al Hoceima on the Mediterranean coast
- 2) **Cultural tourism** in the imperial cities of Fes, Meknes, Marrakech and Rabat
- 3) **Round trips** in the sub-Saharan part of the country, south of the High Atlas along the "Route of the Kasbahs" between Ouarzazate and Errachida

In the 1980s and 1990s, a number of minor extensions were made, including trekking tourism in the High Atlas and desert tourism south of the High Atlas (especially in the region of Erfoud). These products must be characterised as niche segments. In the same period, smaller (coastal) cities in the Rif region such as Essaouira, El Jadida and Chefchaouen also experienced a certain expansion of their accommodation capacities (cf. Fig. 1).

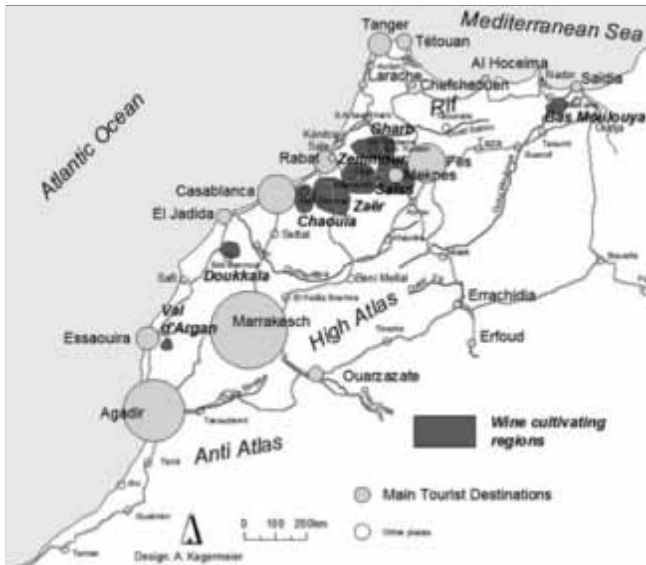


Fig. 1: Main tourist destinations and wine cultivation regions in Morocco

Source: author's design

In 2001, a new tourism strategy was introduced that sought to increase the number of tourists from 2 million to 10 million in 2010 (cf. Kagermeier, 2004). Despite failing to meet the ambitious target, visits by international tourists more than doubled in this decade owing to the three main approaches. The first of these approaches consisted of new beach destinations along the Atlantic coast around the cities of Essaouira, El Jadida and Larache, as well as Saïdia on the Mediterranean coast (Plan Azur). The second approach was fostering cultural urban tourism, which was particularly successful in the case of Marrakech (Plan Mada'in). The third approach involved promoting rural tourism in different parts of the country (Plan Biladi; cf. Royaume du Maroc, 2001).

Due to the important role that the tourism industry will play in the national economy in the decade from 2010 to 2020, a new tourism strategy was developed. The aim of this strategy is to further develop tourism all over the country by enhancing the natural and cultural potentials of those parts of the country that have not yet been exploited for tourism purposes (cf. Royaume du Maroc, 2001). In this context, a special focus was placed on niche tourism. Despite not being mentioned explicitly in the current tourism strategy, wine tourism would fit quite nicely into the general attempt to develop niche tourism by referring to the specific cultural potentials of regions that have not yet benefited from tourism revenues. Before addressing current practices and potentials for developing wine tourism, the next section will give a brief overview of the situation of winegrowing in Morocco.

Viniculture in Morocco

Although winegrowing in Morocco dates back to the Phoenician and Roman period and viniculture was never totally abandoned after becoming a Muslim country (mainly due to a significant Jewish community living in the country in historic times), the roots of present-day viniculture in Morocco lie in the period of French colonisation during the first half of the 20th century. Several wine-growing districts developed following the expropriation of tribal land in the northern part of the country, which has suitable climatic conditions for agriculture, especially along the Atlantic coast. The region between Meknes and Fes in the Saïss plain emerged as the main wine-growing area. Other wine-growing regions included the plains of the Gharb, the Zemmour-Zaër, the Chaouia and the Doukkala region (cf. Fig. 1). In addition to the Atlantic fringe on the Mediterranean coast, another wine region was established along the Oued Moulouya. By the end of the colonial period, some 50,000 hectares of wine were cultivated. Although wine cultivation experienced a significant decline following independence and despite the fact that the legal conditions for cultivating and commercialising wine changed, today wine is still grown on some 10,000 hectares of land (for more details, cf. El Fasskaoui, 2012). Official policy became more restrictive between the 1970s (with the expropriation of colonial farms) and the 1990s (higher taxes on wine). Since the end of the 1990s, the government has slightly altered its policy again, and now attempts to restimulate wine production to a certain extent, attracting foreign wine producers. At the same time, members of the Moroccan elite engaged in wine production by acquiring former colonial vineries. Since the wine-producing districts are geographically around or close to tourism destinations, the question arises whether wine tourism could be an additional segment for pursuing the Moroccan tourism strategy of fostering niche tourism.

Wine and tourism: a natural synergy?

One of the often read claims in the discussion on wine tourism dates back to Haart's statement on the possible synergy effects between tourism and winegrowing (Haart, 2003, cf. Fig. 2). A closer look at the positive interplay between tourism (which might receive positive repercussions when including wine into the portfolio) and wine-growers (who can address new target groups, increase their revenue and stimulate direct marketing) shows that this claim implicitly refers to the situation in Central Europe. In Germany, as well as in Northern France and Northern Italy,

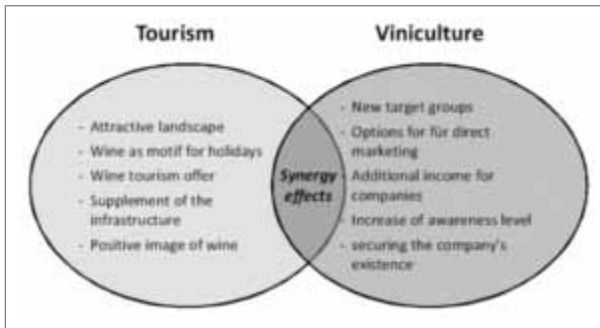


Fig. 2: Possible aspects of a positive interplay between viniculture and tourism

Source: author's design based on Haart, 2003: 239)

- 1) wine is mainly cultivated along valleys where the landscape itself is attractive to visitors.
- 2) At the same time, small-scale production dominates the areas where wine-growers live in small villages along the valley. Thus, winegrowing regions are usually also tourism destinations because the landscape is attractive and the picturesque villages offer cultural heritage.
- 3) Wine-growing districts in Central Europe mainly target a regional or national market where
- 4) direct marketing often plays a relatively important role.



Fig. 3: Large vineyards in the Saïss plain around Meknes

Source: author's photo, March 2013

The situation in the Mediterranean is often quite different. Due to their greater isolation, vineyards are not necessarily found on slopes, but often on plains, making it much easier to farm them. At the same time, large vineyards are much more common than in the aforementioned regions, which look quite different to smaller-scale parcels

on slopes (cf. Fig. 3). Since valleys are usually considered by tourists to be more attractive than mere plains, the natural scenery of wine-growing districts in the Mediterranean region is not necessarily regarded as attractive for tourism. Whilst wine production on the northern coast of the Mediterranean Sea mainly targets the national market, wine-producing countries on the Southern coast are much more oriented towards international customers. To a certain extent, wine is also consumed by international tourists in these destinations.

Hence the aspect of direct marketing plays a much less important role than in Central Europe. Nevertheless, even regions that – unlike Tuscany – are not attractive tourism destinations may try to develop wine tourism, as the case of Alentejo in Portugal shows (cf. Kagermeier & Harms, 2013).

When considering wine tourism on the southern coast of the Mediterranean Sea, certain preconditions must be met that are taken for granted in Central Europe:

- 1) the interplay between winegrowing and tourism can only take place if there is a certain demand for tourism around the wine-growing districts
- 2) a target group with a certain affinity to wine.

Most wine-growing districts in Morocco meet these basic prerequisites. With the exception of the Gharb, all of the regions are close to or around destinations with international tourists or in the hinterland of Rabat and Casablanca, where a significant European community of expatriates lives, which can be seen to a certain extent as a foreign “domestic market”. Since these basic requirements can be met, we will now proceed to take a closer look at the situation of wine tourism offers in Morocco.

Current wine tourism initiatives in Morocco

During a fact-finding mission in March 2013, the wine-growing districts of Morocco were visited in order to determine whether any wine tourism initiatives existed. We started in the Saïss plain between Meknes and Fes. Fes is one of the primary destinations for culture-oriented urban tourism, covering around 60 per cent of Morocco’s wine-growing area (cf. El Fasskaoui, 2012: 121). In this region, almost one third of the land belongs to one single businessman who took over a large number of former colonial farms in recent decades.

This entrepreneur dominates the national wine market and, at the same time, is oriented towards the international export market, using a number of well-known brands. He runs Château Roslane near Meknes as one of his central wine-cellars (cf. Fig. 4).



Fig. 4: Chateau Roslane between Meknes and Fes, which does not yet cater for individual wine travellers

Source: author's photo, March 2013



Fig. 5: Abandoned wine farm house from the colonial period which could accommodate wine tourists in the future

Source: author's photo, March 2013

Unfortunately, however, Château Roslane is not open to the public, apart from appointments for wine journalists or wholesale merchants. The main reasons for running this wine cellar are to promote the different brands and to foster intermediate trade. Direct marketing and targeting wine tourists are not the entrepreneur's central interests. The farm houses on the former colonial farms taken over by this investor have therefore been abandoned, despite having the potential to offer accommodation for high-end wine tourists (cf. Fig. 5).

Although this key player in the Moroccan wine market offers no facilities aimed at wine tourism in the Meknes region, facilities that pursue the idea of receiving visitors in the vineyard were identified on another wine-growing estate of the same owner located in the hinterland of Casablanca. The restaurant "Ryad du Vigneron" was established at the "Domaine des Ouled

Thaleb" near Ben Slimane (cf. Fig. 6). In this case, the main target group is not, of course, international tourists, but the international community living in the Casablanca Metropolitan Area. No accommodation is provided on-site at present, although there are plans to extend the offer and build several accommodation facilities.

Another example of tentative steps being taken towards wine tourism is the "Ferme Rouge", a wine-growing estate of about 800 hectares at Had Brachoua in the Zaër region, some 60 kilometres from Rabat (cf. Fig. 7). In this case, a French investor, whose family has a French wine business, has established a winery. Wine tasting facilities are available, and an old farm house is about to be transformed into a guest house to accommodate visitors. Even a Facebook account has been created as a reluctant first step towards electronic marketing (although it is not yet very convincing). It has to be



Fig. 6: Ryad du Vigneron, a first step towards wine tourism in the hinterland of Casablanca

Source: www.guesthousesinmorocco.com/
www.panoramamoc.com



Fig. 7: “Ferme Rouge”, a second tentative approach towards developing wine tourism in the hinterland of Rabat

Source: author's photo, March 2013



Fig. 8: Restaurant at the vinery “Val d’Argan”, an example for a real wine tourism offer

Source: author's photo, March 2013

stated that the main objective of this wine-growing estate is to cultivate a broad variety of grapes. This can lead to the conclusion that these grapes are either used for producing a good Moroccan blend of wines or to export individual varieties for enhancing the quality of the family's French wines by adding a number of Moroccan varieties to the cuvees produced in France.

The third example can be called the only existing true wine tourism establishment in Morocco. Located a number of kilometres from the evolving tourism city of Essaouira, the “Val d’Argan” vinery is an example of what could also be developed in other places in the future. In 1994, a French wine-grower (whose relatives go back to the colonial period) started testing the suitability of different varieties of grape under Moroccan climatic conditions. Production commenced at the end of the 1990s, and the cultivated

surface has increased steadily ever since (cf. *Domaine du Val d'Argan*, 2013). The orientation towards direct marketing with tentative steps towards wine tourism was brought about by the construction of a restaurant in the middle of the last decade (cf. Fig. 8). Owing to demand, a guesthouse was constructed a few years later to accommodate wine tourists (cf. Fig. 9).

In addition to promoting the offer to tour operators, individual tourists are being attracted via the company's own websites (www.valdargan.com and www.riad-desvignes.com). Thanks to its strategic location close to the city of Essaouira, which has experienced a significant increase in demand and tourism offers in recent years, Val d'Argan can be expected to expand its wine tourism orientation in the years ahead.

At the same time, it must be said that the wine produced – despite being tailored to the international tourism market – is mainly distributed via the large hotel chains in Morocco. Hence the wine produced in Essaouira can be found in national and international hotel chains in Agadir, Marrakech, Casablanca, Rabat and Fes, but is virtually unavailable in small hotels, ryads and guesthouses in Essaouira itself. Since demand is greater than the volume produced, there is virtually no systematic export of the wine. This means that international wine tourists who spend a few days at the Val d'Argan winery are unable to purchase this Moroccan wine after returning home from their holiday. Thus, another motive for vineries in Central Europe and along the northern coast of the Mediterranean Sea to engage in wine tourism activities – gaining future clients for their wine (whether via direct marketing or for purchase from retail wine distributors) – does not exist in the case of this winery.



Fig. 9: “Riad des vignes” guesthouse at the “Val d’Argan” winery

Source: author's photo, March 2013

Missing preconditions and constraints to wine tourism in Morocco

Having conducted an overview of the very few wine tourism-oriented activities in Morocco, it can be concluded that, even though the basic conditions are met, i.e. tourism can be found near or around the wine-growing regions and targets groups have a certain affinity to wine, the current situation is embryonic.

The preconditions in Central European and North Mediterranean vine-growing districts that suffice to induce wine tourism there are met in the case of Morocco, but are not enough. This means that Haart's assumption (2003) of a quasi "natural" synergy between wine production and tourism fails to identify other necessary conditions.

One could suppose that the societal frame conditions in Morocco are the central factor preventing the more widespread existence of wine tourism. And, of course, the fact that Morocco belongs to the Muslim world means that there is only a very limited domestic market for wine tourism. However, interviews conducted with stakeholders on our fact-finding mission revealed that the Koran's ban on consuming alcohol does not create a general resistance to producing wine for the international (tourism) market, neither in the vicinity of the vineries nor amongst their employees. Of course, it has to be admitted that the production and consumption of wine in Morocco is limited by basic legal conditions that are more restrictive than in Europe. Since the end of the 1990s, however, these conditions have been relaxed. The production of wine is now encouraged, as is the consumption of wine by international tourists, reflecting the tolerance and openness of Moroccan society, as well as its historical development.

If the supposed most likely constraint to wine production and wine consumption by international tourists plays no role as a key limiting factor, one has to look for other aspects to explain the rarity of wine tourism activities in Morocco.

The wine-producing sector in Morocco is characterised by three factors:

- 1) It is a highly monopolised market. Apart from the central private key player who dominates about a quarter of the wine-growing area, due to its colonial heritage most of the cultivated area is in the hands of a few owners, most of whom belong to the Moroccan elite.
- 2) The most important key player is the state-owned SODEA (Société de Développement Agricole), founded in 1972 to manage former colonial farms. Although SODEA has since given away and sold the majority of its farmland, it still owns some 5,000 hectares of vineries, i.e. about half of the country's wine-growing area (SODEA 2013).

- 3) In recent years, quite a few former vineries stopped producing wine; they now sell their grapes to other vineries. The lion's share is sold to the central private stakeholder, who receives significant quantities of grapes, even from SODEA farms (cf. Fig. 10). This means that former vineries are reduced to the function of supplying grapes to the small number of monopolistic private or public sector vineries.

The result of these internal structural conditions is that the dominant wine-producing enterprises are almost exclusively geared towards producing and trading wine to intermediaries. Introducing wine tourism as an additional activity does not seem to interest them because it would mean having to take on additional employees. Such employees would have to possess other skills to those of the simple agrarian labour force or the (often foreign) cellar masters. It is simply more profitable for enterprises to concentrate on their primary product – the production of wine – and to increase the volume produced or to raise the quality. Given the abundant availability of cultivable land at reasonable conditions, increasing the volume produced seems to be the more attractive option for Moroccan wine producers.



Fig. 10: Former wine cellars belonging to SODEA in the Zemmour and the Gharb region, where the on-site production of wine has been abandoned in favour of the mere production of grapes, sold to other wine cellars

Source: author's photo, March 2013

At the same time, the vineyard owners (whether national or international) are generally practicing absenteeism. This means they have employed managers and cellar masters to run production without being present at the wineries themselves. Even if these white collar employees may be highly qualified for running an agrarian business or cultivating wine, they are usually not interested in fostering wine tourism. In the case of Val d'Argan, in contrast, the owner is present at the winery, also assuring the quality of the tourism oriented offer.

Wine production and commercialising the product for intermediaries are the main motives for running many of the great wine cellars in Morocco. Regarding market conditions, this behaviour is considered quite rational. In fact, demand – especially from national and international hotel chains operating in Morocco – is so high that current production is unable to satisfy demand. It can therefore almost contradictorily be stated that the presence of a large number of tourists in Morocco who consume wine in coastal resorts or cultural tourism city hotels without any reference to wine tourism can be considered one of the unfavourable factors impeding the necessity for producers to seek direct marketing opportunities in wine tourism. This aspect can be generalised to a certain extent. Even in Germany, wine producers, relying on an assured demand for their specific product (e.g. high-end premium wines with specific USPs), tend to be less interested in fostering wine tourism than other vine-growers with more standard medium-priced wines.

On the other hand, the dominance of a few wine-producing cellars that encourage smaller former wine-producing farms to restrict themselves to producing grapes, play an important role. A similar tendency can be observed in Central Europe, where grape farmers who deliver their grapes to wine-producing cooperatives usually have little interest in wine tourism. In the Moroccan case, the change from producing wine to producing only grapes for large wineries is, of course, facilitated by the fact that there is no national educational infrastructure on wine cultivation. Large entrepreneurs can import the necessary know-how (mainly from France) by employing skilled specialised labour forces. The production conditions of smaller wine-producing farmers have not really developed in recent decades, putting them at a disadvantage concerning the quality of their products.

From the perspective of wine tourism, state-owned SODEA also plays a role that is not conducive to wine tourism. Regardless of whether they continue to produce wine (in centralised units) or whether they have switched to merely producing grapes that are sold to one of the large private wine producers, the business model of SODEA farms is unsuitable for wine tourism – not least because government employees show no ini-

tiative towards this economic sector. This behaviour can also be observed to a certain extent in Central European wine-producing cooperatives and state-run vineries, although this cannot be generalised, as many counter-examples show.

The central lesson learned from this case study on Morocco is that the model proposed by Haart (2003) concerning postulated synergies between viticulture and tourism must be complemented by a number of crucial preconditions on the wine-producing side before wine tourism can be thought of as an option for a wine-growing district:

- 1) Apart from the basic and evident fact that a certain adequate tourism demand must be present in wine-producing regions,
- 2) Market conditions where demand exceeds supply, so-called seller markets, do not seem to be conducive to wine producers becoming involved in wine tourism. Wine producers will only show an interest in engaging in wine tourism if they see an economic advantage of improving the commercialisation conditions (regarding volume or price) of their products by direct marketing.
- 3) Monopolised market structures do not seem to be conducive to introducing wine tourism activities. Reduced competition often leads to a continuation of traditional behaviour, inhibiting the search for innovative new product lines such as wine tourism. Hence the situation in Central Europe, featuring smaller farms where direct marketing is an attractive option for wine producers to increase their revenue, seems to be a positive frame condition.
- 4) Too small farms tend to restrict themselves to only producing grapes, avoiding the skills required to produce wine. Hence a mixture of medium-sized farms where wine can actually be produced on the farm seems to be another positive factor for wine tourism.
- 5) State-owned farms and private farms with absentee owners tend to have little interest in engaging in wine tourism. Therefore privately owned, owner-run wine farms – as can be found in most parts of Central Europe and to a great extent on the northern coast of the Mediterranean – are another favourable factor for establishing wine tourism.

With regard to the case study of Morocco, the central conclusion that can be drawn is: at first sight, quite promising options for establishing wine tourism seem to exist – given the fact that the production of wine and its consumption by foreigners in this country is not generally frowned upon or stigmatised and the necessary tourism demand is present in and around the wine-producing regions. However, the structural

conditions of the wine-producing market significantly hinder the creation of a flourishing wine tourism market. It cannot yet be predicted whether the few existing examples of wine tourism will attract followers. But even if it seems quite likely that several private initiatives (predictably owned and run by foreign investors) will be created in the years ahead, the unfavourable structural market conditions will impede the widespread distribution of this economic activity, diminishing the potential for intended growth in the tourism sector. The only way wine tourism would have a chance would be for SODEA to sell much of its grape-producing areas and to change into a facilitator of wine production by offering systematic training facilities for medium-sized wine farmers, applying quality certificates and facilitating distribution opportunities. However, it seems unlikely at present that this will be realised and implemented.

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Erfolgreiche Partnerschaften im Zusammenspiel von Wein(-wirtschaft) und Tourismus schaffen neue Chancen der Produktentwicklung und gerade in ländlichen Regionen erwachsen aus dieser Vernetzung zahlreiche Initiativen und Aktivitäten, die zur Festigung lokaler Wirtschaftskreisläufe beitragen.

In dieser Publikation, die aus dem 3. Symposium des Arbeitskreises *Weintourismus* der Deutschen Gesellschaft für Tourismuswissenschaft e.V. (DGT) hervorgeht, wird ein wissenschaftlicher Einblick in gegenwärtige Themen im Kontext von Wein und Tourismus gegeben. Die enthaltenen Beiträge haben strategische Aspekte im Zusammenhang von Wein und Destination, Analysen im Bereich Konsumentenverhalten sowie internationale Perspektiven und Trends zum Inhalt. Anhand eines Praxisberichts über die Initiative *wein.kaltern* wird abschließend ein Eindruck über aktuelle Entwicklungen in einer Südtiroler Weindestination gewonnen.

Das Symposium, das am 24. Mai 2013 an der Europäischen Akademie Bozen im Rahmen der Tagung „Regionale Produkte und Tourismus: Perspektiven für Obst- und Weinbau“ stattfand, hat der akademischen Diskussion rund um das Thema Wein und Tourismus weitere Impulse gegeben.

Successful partnerships in the interplay of wine(-economy) and tourism generate new chances for product development and, especially in rural regions, numerous initiatives and activities arise that contribute to local economic cycles.

This publication, which results from the 3rd Symposium of the Workgroup *Wine and Tourism* of the German Society of Tourism Research e.V. (DGT), gives a scientific insight into current topics regarding wine and tourism. The included articles deal with strategic aspects in the context of wine and destination, with analyses concerning consumer behaviour as well as with international perspectives and trends. Based on the case study of the initiative *wein.kaltern*, there is finally an impression gained of actual developments within a South Tyrolean wine destination.

The symposium, which took place on the 24th of May 2013 at the European Academy of Bolzano in the framework of the conference “Regional Products and Tourism: Perspectives for Fruit-growing and Viticulture”, provided further inputs for the academic discussion around the topic of wine and tourism.

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