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A Cross-Cultural Comparison of New Implemented Sustainable Wine Tourism Strategies during the COVID-19 Crisis

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Abstract: To compensate for loss of business during the COVID-19 crisis, wineries in the tourism industry had to apply new strategies. In order to collect and compare these newly developed sustainable strategies, a cross-cultural study has been conducted in 2021. This study is based on a qualitative survey using purposeful sampling with key decision-makers of 70 wineries from the U.S., Australia, Germany, Hungary, and Romania covering wine growing countries both from the Old and New World. The aim was to identify new and sustainable initiatives and resilience strategies implemented to deal with the disruption caused by the COVID-19 pandemic, noting any cultural differences in each country's response and to analyse the perspectives of wine tourism in the future. The findings highlight the wineries' impressive focus on creativity and flexibility while also bringing attention to cultural differences. The insights form a preliminary suggestion for best practice strategies that businesses within wine tourism may consider helpful in their future business planning.

Keywords: COVID-19; wine tourism; strategies; cross-cultural study; resilience; crisis management; sustainability

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1. Introduction

The year 2020 will be remembered as a year of disruption, when the outbreak and spread of the SARS-CoV-2 virus (COVID-19), along with the global efforts to contain it, caused ruptures—politically, economically, socially, and technologically. The lucrative tourism sector was severely affected as travel restrictions and lockdowns were enforced around the world, reducing it in terms of visitor numbers to 1990 levels [1]. Wine tourism is an important component of national tourism for many wine-producing countries, comprising leisure, culinary, experiential, historical, and cultural visits, which were heavily impacted by this disruption [2].

From the perspective of winery owners, visitors to their cellar door and tasting facilities have become an increasingly important revenue stream [3]. Therefore, the suffering endured was acute, as wineries engaged in wine tourism had to quickly adapt their business model and strategies to fit the rapidly changing trading environment in order to stay viable. Many were forced to rethink their marketing approach, reimagining their tourism offerings. Some owners, however, saw the disruption as an opportunity to reset the tourism industry, to implement a more innovative and sustainable foundation [4]. For this reason, it is of great importance to investigate the reaction of winery operators on the market changes.

This study investigates the changes to the operation models from a winery's point of view, that are possibly instigating this reset. A total of 70 qualitative in-depth interviews were conducted with key decision-makers within the industry from five different countries. Questions were centred around three themes of adaptation and initiatives: resilience, strategy, and future potential/development of wine tourism. The aim was to identify new strategies undertaken to deal with the disruption of the COVID-19 pandemic, gauging whether these strategies could lead to sustainable structural change, noting any cultural differences in each country's responses.

This timely study offers preliminary insight into innovations and strategies implemented to mitigate the upheaval of the first wave of the COVID-19 crisis in Australia, the U.S., Germany, Hungary, and Romania. It identifies significant structural changes that can be leveraged to benefit the businesses beyond the current crisis, relative to their cultural traditions and business practices. The reset and reimagining can also be seen as an opportunity to plan for resilience with more sustainable wine tourism offerings, potentially future-proofing their business against further disruption.

2. Literature Review

As the field has developed over the last twenty years [5], definitions of wine tourism have built onto Hall's foundation [6]. Expanded definitions refer to complimentary aspects to wine tasting such as culinary, heritage, cultural, and ecotourism in wine growing regions, festivals, relaxation, and other outdoor activities [3]. From the suppliers' side, visits to the cellar door are an important channel for a winery: "an opportunity for direct sales and marketing" [7]. It can bring many benefits to entrepreneurs: an increase in brand equity, customer loyalty, word-of-mouth advocacy, wine club membership and retailer profit margin [8]. There can also be personal gains: direct engagement with customers and the satisfaction of a subsistence livelihood [9]. Studies have shown that a positive memorable experience for visitors, that feels personalised and authentic, is the foundation for a strong and loyal customer base [10], which, in turn, increases revenue [11].

2.1. The Effect of COVID-19 on Global Wine Tourism

Since March 2020, as the COVID-19 pandemic spread exponentially across the globe, many international and interstate borders were closed, and restrictions placed on local movement. Initially, wineries were closed to visitors, but then they gradually re-opened with strict COVID-safety measures.

There were three operational factors that allowed wineries to welcome visitors back onsite, that also had the potential to benefit the business: the implementation of a reservation system able to capture customer data; the hosting of socially distanced, seated tastings with customised service; and dedicated time allocations, which facilitated an authentic, personal experience with the winery's staff. Reservations and customised service can markedly improve a winery's efficiency and revenue since both staffing and customer requirements can be planned, the data and feedback gathered can be strategically used in a customer relationship management system (CRM) for targeted marketing strategies, and visitor satisfaction and loyalty are enhanced due to the personalised attention, leading to a higher spend per customer [11].

The experience economy theory says that "every company competes with every other company in the world for the time, attention, and money of potential customers. What every company needs to do, then, is create an experience that first gains potential customers' attention, then gets them to spend time experiencing their offerings and finally causes them to spend their money by buying those offerings" [12]. As Filopoulos [13] states, "the attention, time, and money that the guest spends in the winery and its region, and the impact of the experience are the key [performance] indicators", rather than merely the volume and value of wine sold, as these other factors are deemed to have a longer-lasting effect than a single financial transaction.

Trends regarding the conduct of wine tourism during the pandemic highlight the importance of collaboration, domestic visitors, open air wine experiences and digital innovations. The most common marketing strategies, as noted in research conducted by Garibaldi [14] were (in order): increasing online sales, home delivery, virtual wine tastings, gift cards, and wine club memberships. This was confirmed by Loose and Nelgen [15], who found that the main strategies of wineries were the intensification of online communication, a focus on DTC (direct-to-consumer) sales, creating new sales channels, implementing a home delivery service, a reduction in costs and use of public aid. A quantitative survey conducted by Ridoff [16] saw revenue decrease due to the loss of gastronomy, export, and tourism channels, despite the increase in online and DTC sales.

To gain customers' trust, authentic messaging with a personalised touch was identified as a powerful tool in times of uncertainty, to make customers feel valued and part of the business. Collaboration with other local businesses and consumers was also deemed important to nurture enduring supportive relationships [14].

One of the strongest impacts of the crisis is the acceleration of digitalisation [17]. With the absence or reduction of physical visitors, wineries became heavily reliant on digital technology, using the internet for online sales, advertising campaigns, and virtual events. Data became the new currency to target, segment, communicate with, and sell to customers. As Carmer et al. [18] stated in their study, the change of wine courses for sensory perception training from face-to-face to fully online presented many challenges. However, as the best practice results show, suitable solutions could be found. Shifting to virtual settings can positively impact companies, not only by increasing employee job satisfaction due to saving time and an increase in work flexibility, but also by saving travel costs and contributing to the reduction of greenhouse emissions [19]. This structural change for wineries is explored further in our research below.

2.2. Resilience and Adaptation Strategy

Innovation and adaptation to the changing marketplace allowed wineries to remain competitive and viable. Such a strategy is integral to building resilience in order to manage disruption and sustain the business [20]. This has recently been explored in relation to wine tourism [21]. The unprecedented, sudden, and intense challenge presented by the COVID-19 crisis meant that businesses had to act quickly. This was even more critical when wineries faced other forms of disruption, not only to visitation and sales, but also to harvest operations, as happened in Australia and New Zealand. Those wineries who had already built a resilient business strategy were able to move faster [22], confirming the necessity and benefit of crisis planning for a wine business.

Disruption can also be seen as an opportunity for businesses to define, test, and try alternative operating models and redesign new ways to move forward [23]. The proliferation of virtual wine events and e-commerce was a result of this pivot to new sales avenues. Initially, many wineries developed these offerings as a substitute for physical visits, then as restrictions on travel eased and a limited number of visitors could return to the wineries, they were treated as supplementary to cellar door sales [24]. The potential of this new hybrid model of wine tourism is vast and can create a resilient foundation for a sustainable business, while simultaneously embracing the needs of tourists and ensuring business continuity [25]. Thach [26] further expounds the benefits for wineries: "Not only are [virtual events] useful in times of crisis . . . they are also a means of attracting the next generation of wine consumers, who have already integrated online experiences into their lives. Taking the time now to invest in some of the components of an online wine tourism system—linked to wine ecommerce—is a powerful first step towards creating a resilient business that can be successful during both times of crisis and calm".

According to Dahles and Susilowati [27], economic recessions, such as those caused by COVID-19, pose major challenges to local tourism. They investigated how local tourist businesses in a developing country respond to crises and the resources these businesses employ to build resilience. Other authors (i.e., [28–30]) also emphasised the importance of building resilience in the tourism sector, as a whole. Gilinsky et al. [31] investigated the impact of strategic resilience after a natural disaster in Napa and Sonoma counries by using content analysis. Key results of their survey identified four main conceptual constructs: realizing a need, building stakeholder support, securing resources and capabilities, and exemplifying best practices. Another study published by Dressler and Paunovic [32] dealt with innovative business models in the German wine industry. The authors defined seven different strategies in total, with different focuses on the three pillars of sustainability. Tahar et al. [33] analysed the role of Destination Management Organizations in the coordination of collective and coherent wine tourism strategies and found that these organizations are of great importance.

Taking the definition by Putra [34], adaptation strategy can be defined as a pattern of behaviour or actions being planned by humans to meet the minimum necessary requirements to solve the problems faced. Applying the findings by Lazarus and Folkman [35], in the case of adaptation strategies during the COVID-19 pandemic, the specific discussion revolves around problem-focused coping, where producers take action to solve problems or seek information that is useful for problem-solving.

To our knowledge, no comparative study has investigated strategy adaptation and resilience management in the field of wine tourism during the COVID-19 crisis on a global scale. Therefore, this research aims to develop new knowledge about how wineries reacted to the changed situation, which may help them establish resilience and adaptation strategies for future disruptions. The study could also have implications for other challenges facing wine tourism operations, such as wildfires or other natural crises, which have also adversely affected tourism in wine growing regions. Hence, the academic contribution, primarily due to the lack of published results on a global scale, should not be underestimated.

3. Materials and Methods

3.1. Objectives

As outlined in the literature review, the pandemic was a catalyst, changing the wine tourism industry of many countries, predominantly in the areas of digitalisation, product delivery, and overall business strategy. Either new strategies in all these areas had to be quickly developed, or emergent strategies had to be expedited in order to adapt to the sudden and fundamental disruption caused by the pandemic. Thus, three research questions (RQ) arise.

The first research question deals with adaptation strategy and investigates the reaction of wineries on the lockdown. This study's first research question is as follows: RQ1—Which adaptation strategies did wineries in wine tourism use, and which concrete initiatives have been introduced to deal with the disruption caused by the COVID-19 pandemic?

As stated in Section 2.2, resilience is, especially in times of crises, of great importance. Therefore, the second RQ focuses on resilience building: RQ2—What are the strategies for wineries to build resilience during the COVID-19 pandemic.

Several researchers (i.e., [36–38]) investigated in the last two years the effect of the COVID-19 pandemic on tourism. For collecting and analysing trends for the post-COVID-19 pariod, the third research question was formulated: RQ3—How do wineries see the future of wine tourism after the COVID-19 crisis?

Given that no academic paper has been published on new strategies in the wine tourism sector during the COVID-19 pandemic, this pioneering study provides the first insights for scientific purposes. In addition, as emphasised in several other publications (i.e., [39]), a cross-cultural analysis helps to understand the significant differences between five different countries.

3.2. Country Selection

Five countries were selected for this study, representing a range of historical and cultural approaches to wine tourism. Australia and the U.S. represent the "New World" for this study, hailing from both the northern and southern hemispheres. The "Old World" is represented by Germany, Hungary, and Romania, spanning the continent from Germany in Western Europe to Romania in Eastern Europe, with Hungary as a bridge from the "traditional" West European producers known throughout the global wine industry, to the Balkans, which has traditionally focused on local markets. The availability of native-speaking interviewers was also a factor that influenced the selection of countries.

Table 1 below provides an overview of the wine industries in the countries pertaining to this study, followed by a brief description of the importance of wine tourism for each.

Table 1. Wine Industry Statistics (2020).

Country	Vineyard Area (ha)	Production (hl)	Consumption (hl)	Export (hl)	Import (hl)
U.S.	405,000	22,750,000	33,000,000	3,636,000	12,309,000
Australia	146,244	10,900,000	6,020,000	7,470,000	1,008,000
Germany	103,180	8,405,000	19,800,000	3,587,000	14,342,000
Hungary	64,814	2,586,000	1,925,000	1,316,000	83,000
Romania	190,322	3,550,000	3,825,000	250,000	360,000

Source [40].

Australia's dynamic, innovative wine tourism industry is driven by entrepreneurship, collaboration, co-opetition, and coordinated strategies between all stakeholders. In 2018–2019, a total of 8.4 million winery visitors spent 9.6 billion Australian dollars (current exchange rate April 2022: 1 Australian dollar = 0.68 Euro) during their stay, with food and wine offerings being a strong driver in developing these wineries as a destination of choice [41].

The U.S. winery industry is also characterised by innovation and a resilient attitude in the face of environmental challenges. It is estimated that in 2017, more than 13 million winery tourists, predominantly domestic, made over 43 million visits to American wineries, spending 17.7 billion US dollars (current exchange rate April 2022: 1 US dollar = 0.91 Euro) [42].

Although Germany is the largest tourism market in Europe for revenue [43], wine tourism as a national strategy for sustainable regional development has only become a topic in the last decade [9]. Approximately 26.4 billion Euros is spent annually, generally on tourism in the 13 winegrowing regions, with 7.3 million wine tourists amongst the total—90% of whom are domestic—spending an estimated 5 billion Euros per annum [2].

Despite the 2000-year-old wine-making tradition, wine tourism in Hungary has developed significantly only in the last 15 years. The growth of wine tourism coordinates with the development of general tourism in the country [44]. Scientific papers have been published already on different wine growing regions or wine tourists' preferences; however, the economic impact of wine tourism in Hungary has yet to be investigated.

Wine tourism in Romania is still nascent compared to other European countries, but it has a real chance for development, particularly with the increased domestic interest [45]. Like Hungary, no papers have yet been published regarding the economic impact of wine tourism in Romania.

3.3. In-Depth Inverview and Content Analysis

A primary qualitative research method, in the form of expert interviews, was chosen as the most valuable way to gather information for this study. By collecting data directly from the experts and key decision-makers, there was an acquisition of a deeper understanding of the impact of the crisis on wineries and the strategies used to adapt to the disruption [46]. The interviews were conducted online or by telephone by four native-speaking, trained interviewers (the authors of this paper) who recorded, transcribed (literally), coded, and analysed the interviews according to a coding and analysing scheme. All the questions were translated into the official language of the selected country, back translated, and tested with three wineries in Germany and in Australia, before the field work started. The interviews, as well as the entire analysis, were conducted in the respective language, and only the final results were translated into English.

A semi-structured catalogue with open-ended questions has been designed based on the research questions that allowed for a new and unexpected phenomena to be revealed, which then required creativity and flexibility for analysing the content [47], whilst adhering to criteria of validity, reliability, and replicable inferences from the content gathered [48]. It was also a particularly suitable method considering the complexity of the situation that many of the experts were facing at the time of the interviews (fires, harvest, pandemic, lockdown, etc.). Thus, the open-ended questions allowed them to discuss their situation within a wider context than a quantitative survey would have normally allowed.

Interviews were held in August–October 2020, capturing the wineries' responses to the first wave of the pandemic and their outlook at that point in time (Table 2). The interviewees were asked about three themes that would pertain to RQ1, RQ2, and RQ3: firstly, their initial response to the disruption, the adaptation of the winery's existing business processes, and the newly developed initiatives; secondly, the support and strategies that enabled the business to survive or thrive (resilience); and lastly, their short- and long-term outlook for wine tourism in the correspondent regions and the future of cellar door operations.

Table 2. Period of the first lockdown when wineries have been closed.

	U.S.	Australia	Germany	Hungary	Romania
Period 2020	19 March–15 May	23 March–1 July (NSW)/22 September (VIC)	17 March–6 May	11 March–18 May	16 March–15 May

The interviews were analysed by means of content analysis using the software MaxQDA. Content analysis has been defined as a systematic, replicable technique for compressing a large amount of text into fewer content categories based on the explicit rules of coding [43]. We quantified and analysed the presence, the meanings, and the relationships of the words and concepts in the interviews, and then we made inferences about the messages within the texts [49,50]. Deductive and inductive schemes were used for coding the open-ended questions.

For each research question, the quantifiable results of the survey have been summarized in the form of a table using frequency and valency analysis. In addition, we also used causal analysis and described separately the cross-cultural differences between the interview partners.

3.4. Interview Partners

By using purposeful sampling, the criteria of choice for interview partners were experts from those wineries considered to be amongst the country's well frequented wine tourism destinations, in regions well known to visitors. In order to reach a heterogeneous sample, we varied the wine regions and the size of the interviewed wineries. Hence, they would be well positioned to discuss the impact of the pandemic on wine tourism and how travel restrictions affected cellar door visits. In order to preserve anonymity, the wineries were coded. Below, Table 3 shows the number and region of the wineries interviewed and Table 4 indicates the size of the wineries.

Table 3. Overview of the wineries interviewed in five countries.

Country	No. of Wineries	Region
Australia	16	Adelaide Hills (1); Barossa Valley (2); Fortitude Valley (1); Hunter Valley (2); Margaret River (2); McLaren Vale (2); Mornington Peninsula (1); Rutherglen (1); Sydney (1); Yarra Valley (3)
United States	11	Oregon (5); Paso Robles (1); Napa Valley (2); Sonoma (1); Finger Lakes (1); Washington State (1)
Germany	12	Baden (1); Franken (2); Mosel (2); Pfalz (2); Rheingau (4); Saar (1)
Hungary	15	Etyek-Buda (4); Villány (4); Szekszárd (2); Badacsony (2); Pannonhalma (1); Tokaj (1); Mór (1)
Romania	16	Cotnari (1); Dealu Mare (7); Murfatlar (1); Recas (1); Silvaniei (4); Miniș-Mșderat (2)
Total	70	35

Table 4. Size of the interviewed wineries (in hectares).

	U.S.	Australia	Germany	Hungary	Romania
up to 10 ha	1	0	0	3	3
10–20 ha	3	1	2	2	3
20–50 ha	3	0	3	4	3
more than 50 ha	4	15	7	6	7

4. Results and Discussion

Although approaches to wine tourism vary enormously, both within and between the five countries in this study, there are many common themes that emerged when faced with sudden disruption to trading, as was the case with the COVID-19 crisis. The results of the interviews are summarised below under the three themes that guided the questionnaire.

4.1. Adaptation and Initiatives

The first RQ focuses on the adaptation of wineries in times of crisis, then documents initiatives. Table 5 summarises the most important findings deduced from the interviews.

Table 5. Most cited initiatives by country with the number of frequencies.

U.S. (n = 11)	Australia (n = 16)	Germany (n = 12)	Hungary (n = 15)	Romania (n = 16)
Leverage CRM database (11)	Leverage CRM database (16)	DTC sales: phone, mail, online (9)	Virtual events (private, trade, corporate) (12)	Optimise/Exploit digital platform (14)
DTC sales: phone, mail, online (11)	DTC sales: phone, mail, online (16)	Virtual events (private, trade, corporate) (8)	Optimise/Exploit digital platform (11)	DTC sales: phone, mail, online (10)
Optimise/Exploit digital platform (10)	Optimise/Exploit digital platform (16)	Optimise/Exploit digital platform (8)	Discounts, free delivery, value add, etc. (6)	Discounts, free delivery, value add, etc. (8)
Reserved, seated paid tastings (9)	Reserved, seated paid tastings (12)	Leverage CRM database (6)	DTC sales: phone, mail, online (4)	Combining wine and nature (7)
Virtual events (private, trade, corporate) (7)	Virtual events (private, trade, corporate) (11)	Discounts, free delivery, value add, etc. (5)	Food and wine delivery service (2)	Virtual events (private, trade, corporate) (7)
Discounts, free delivery, value add, etc. (5)	Discounts, free delivery, value add, etc. (9)	Reserved, seated paid tastings (1)	Create a coupon system (1)	Leverage CRM database (5)

The initial response to the COVID restrictions by most of the American and Australian respondents was marked by agility, "fast pivots" to virtual approaches, take-away offers due to visitation restrictions, and fast decision making. Several interviewees spoke of being proactive and initiating pre-emptive strategies when they could, yet others struggled to keep up with the ever-changing circumstances. Proactivity has been emphasised several times as one of the main pillars of adaptation, underlining the findings by Kajan and Saarinen [51], who investigated tourism and climate change adaption.

The entrepreneurial drive to seize new opportunities and "learn by doing", strongly motivated by the vision of progressive owners, was cited as a powerful force to unite staff and not only survive, but thrive, during the crisis. An alternative approach was taken by the majority of the German respondents, who conveyed a more cautious approach: "at first, we wait and see what happens". They were, perhaps, culturally more reluctant to adopt new technologies when the return on investment had not yet been proven and the urgency was not so apparent. This contrasted with the "early adopter" attitude of wineries with a higher share of wine tourists. In Romania and Hungary, the respondents reacted differently, depending on the relevance of wine tourism for their winery.

When asked about the wineries' new initiatives, almost all participants acknowledged that CRM helped—or would have helped—significantly during and after the lockdowns. As one of the American interview partners pointed out " ... we were lucky that our CRM system was already established before the crisis and we could fall back on contacts and addresses . . . that was of great importance in times when visitors were absent . . . ". This confirms the findings by several other researchers (i.e., [52]) that CRM is of great importance when building a successful wine tourism business. Obviously, a prior investment in CRM is critical, taking effort and the proper resources. However, those who had a well-functioning CRM system, containing contact information of visitors and customers, benefitted greatly, being able to keep in touch with end-consumers, inviting them to an online wine tasting or offering a special wine package [53]. Leveraging CRM was one of the most important initiatives in New World countries, while in Europe, probably because CRM did not play an important role in the past, it was less frequently mentioned.

Several research papers have proven the growing importance of DTC sales, especially in the case of wineries [54,55]. During the interviews, most of the discussion centred around concentrated marketing efforts to promote DTC sales, predominantly on digital platforms, but also through traditional modes (telephone, mailing lists, print, radio, billboards, etc.) because, as one of the Hungarian winery managers stated, " . . . without supermarket listings, direct-to-consumer sales were the only way to sell wine during the lockdown . . . ". A common refrain was the need to invest in optimising and exploiting digital presence and performance, hiring digital expertise where necessary, to increase reach and followers, ensuring websites were mobile-friendly and generating interesting engaging content across the many social media platforms, which may support online sales, a factor also stated in a paper by Szolnoki, et al. [56]. Paid advertising, boosting posts, targeting/tracking users from websites, and using social influencers were deemed worthy investments by many wineries, particularly in the New World, to capitalise on the captive audiences at home during lockdown. Several of the European interviewees—especially from Germany and Hungary—spoke of their prior intention to set-up an e-commerce channel, but they had not deemed it necessary until now; thus, COVID became the catalyst for them to do so. This finding confirms the results by Szolnoki, et al. [57], which shows the difference between Old World and New World wineries in terms of using e-commerce. According to this result, wineries from the New World are more advanced in terms of digitalisation and e-commerce.

The biggest innovation to come out of the crisis was the profusion of virtual tastings and events for private, corporate, and trade customers via live streaming, such as Zoom, Instagram, Google Meets, YouTube, and other social media platforms. The importance of virtual wine tastings during the lockdown has already been confirmed through an international survey by Szolnoki et al. [24]. An Australian winery owner summarized the success of virtual wine tastings as follows: "Differentiation, engagement, and high-quality content are the keys to success in this highly competitive space". In addition, another interviewee from the US stated that, " . . . capturing data, the acquisition of new customers, and sales conversions are also of great importance when it comes to virtual wine tastings". The benefits were many, suggesting that they would remain as a vital part of a post-pandemic strategy, creating a new hybrid business model whereby wineries could continue to offer virtual events concurrent with physical ones. As one American interviewee remarked, "With every event that we plan now, there will also be a question asked—can we do it virtually too?" German and Hungarian wineries also emphasised the importance of virtual tastings. In contrast, less than half of the Romanian wineries saw online tastings as a "realistic" solution, preferring direct interaction with customers.

During lockdown, other initiatives were pursued, realigning the wineries' value proposition with the customers' new needs. The majority chose free delivery for a reduced minimum spend. This practice has already been described by Danenberg [58], but its importance increased significantly during lockdown. Many of the Australian and American wineries utilised their own staff to perform local deliveries, which personalised customer service, kept staff employed, and guaranteed fast delivery, contrasting the unreliability of the postal service. Wineries quickly changed their operating model to "curbside pickup", takeaway, and "@home" experiences, as described by Kim and Im [59].

As is already known, positive experiences at cellar door wine tastings have a significantly beneficial influence on purchase intentions and the value and quantity of the products purchased [60,61]. Therefore, for wineries it was crucial to continue offering this kind of experience, but in a completely new form due to the pandemic. In terms of operations, the most successful and agreed upon new initiative for nearly all participating Australian and American wineries and one to be continued in the future, was the shift to reserved, seated, paid tastings with smaller groups. Wineries wholeheartedly endorsed this as an "absolute blessing", something they had been wanting to implement for a long time, never having the courage to do so. These changes to the cellar door tasting experience, initially to comply with COVID-19 regulations, created valuable benefits for both the winery and customers, suggesting that it will remain constant in these countries, beyond the crisis. In contrast, the German, Romanian, and Hungarian wineries did not mention this as being part of the adopted wine tourism strategy. This could probably be traced back to the fact that during the lockdown in Europe, all wineries had been closed, and after relaxing the regulations, the demand did not seem to exceed the supply in terms of tasting capacity. In addition, in the Old World, cellar door visits had not been developed as paid experiences to the same extent as in the New World; therefore, the benefits of and higher spends with customised experiences at seated tastings were not expressed by these interviewees.

4.2. Resilience Strategy

RQ2 deals with new resilience strategies wineries used during the pandemic. The results have been summarised in Table 6.

Table 6. Most cited business/resilience strategies by country with the number of frequencies.

U.S. (*n* = 11)	**Australia (*n* = 16)**	**Germany (*n* = 12)**	**Hungary (*n* = 15)**	**Romania (*n* = 16)**
Strategic CRM for DTC sales—phone and digital (10)	Strategic CRM for DTC sales—phone and digital (16)	Wage subsidy schemes (9)	Wage subsidy schemes (11)	Diversified sales channels (8)
Wage subsidy schemes (9)	Wage subsidy schemes (14)	Strategic CRM for DTC sales—phone and digital (7)	Diversified sales channels (6)	Reducing costs (8)
Mindset—agility, innovation, teamwork (8)	Mindset—agility, innovation, teamwork (12)	Diversified sales channels (7)	Shorter working hours (5)	Wage subsidy schemes (7)
Brand strength (8)	Brand strength (10)	Brand strength (4)	Use of own capital (3)	Brand strength (6)
Recurring revenue—wine club (7)	Recurring revenue—wine club (4)	Mindset—agility innovation, teamwork (3)	Brand strength (2)	Strategic CRM for DTC sales—phone and digital (5)
Diversified sales channels (2)	Diversified sales channels (3)		Crisis management (1)	Mindset—agility innovation, teamwork (2)

As stated by Kozeniauskas et al. [62], support received by small- and middle-size firms from the government, associations, and other businesses was vital for many, helping them adapt to the rapidly changing events, allowing them to remain viable. The most fundamental support of the government in all countries came in the form of a subsidised wage scheme. Nearly all wineries in the study were eligible to receive this, and they stated that it had been invaluable in keeping staff employed and connected to the business, for continuity of trading and as an extra layer of security in uncertain times. It gave the businesses time to adjust and reset their strategies. Many interviewees also cited the availability of loans with no or low interest and delays on payroll taxes, which is further emphasised by Loose and Nelgen [15].

An ability to pivot quickly to new modes of communication implies having planned for resilience (being proactive) and having a prior investment in CRM systems, technological infrastructure, and DTC sales (as stated in Section 4.1). Before the COVID-19 disruption, it was mainly the two New World countries and Germany that focused on CRM and DTC (according to interviews); in contrast, the Eastern European countries did not consider the importance of this strategy. An American interviewee summarized the importance of CRM and DTC very simply: " . . . it was super clear to me, the two things that we had that would help us get through. One of them was relationships to consumers. And the other was being able to make fast decisions and sell directly to consumers . . . they both are key to being resilient".

One third of the interviewees from Australia and the U.S. credited strong visionary leadership and an open-minded outlook for their agile adaptation to the new ways of doing business (i.e., mindset, agility, and innovation), which is further demonstrated in the work by Tyrrell and Johnston [63]. These participants spoke of a progressive culture in their respective enterprises, one of constant innovation, personalised customer focus, passionate motivated teams, and a solid digital infrastructure to drive business. Technology was used strategically to engage, collect, coordinate, and target messaging, while also tailoring social media activities, to maintain a strong emotional connection to the brand—both internally and externally. Brand strength and the communication of core values were cited by these interviewees as playing a key role in their ability to prosper during this time, both with employment and revenue generation.

The importance of branding cannot be overlooked. Building and promoting wine brands is crucial in wine tourism [64,65]. Some of the more traditional German wineries recognised a need for brand building stating that, " . . . we obviously have to work on our image and become more progressive in the sense that we foster the value of the brand". In addition, a broader digital strategy has also been mentioned by another German winery manager: " . . . this included not only a simple web page, but encompassing online sales, social media, and international accessibility for websites and online shops".

Vincent and Webster [66] found that relationship management in membership associations (wine clubs) has the potential for strong support in terms of a winery's revenue generation. Wine clubs play an important role mainly in New World countries; thus, only wineries from the U.S. and Australia mentioned the recurring revenue of wine clubs as a resilience strategy. During the COVID crisis, wine club members proved to be a loyal and stable customer base, who continued to purchase directly and regularly from the winery despite the crisis. This finding is in line with that of Bauman and Taylor [67]. In the other three European countries, wine club membership was not a topic that was touched upon during the interviews, as it is not part of the business model used by wineries in those countries.

This crisis presented numerous urgencies for wineries, as well as the business world as a whole. The financial urgency for wineries to keep trading and create alternative revenue streams to compensate for the overnight loss of many traditional sales channels (cellar door, wine tourism, events, hospitality, gastronomy, exports, airlines, and travel retail) was a common necessity promoting new strategies—tourism was often only one aspect of their business [68]. Romanian wineries, in particular, were highly dependent on HoReCa (hotel, restaurants, and catering) sales, with most stating that keeping the business afloat was the biggest challenge. Diversification of sales channels proved to be the foundation for resiliency, as noted particularly by many of the German respondents, who had built this into their business model. Several Australian interviewees subject to long lockdowns, spoke of reverting back to being primarily a winery rather than a tourism and event destination during this period.

4.3. Future Outlook for Wine Tourism

RQ3 analysed the short- and long-term outlooks of wineries after COVID-19. Table 7 contains the most frequent statements from the interviewees.

Table 7. Most cited future strategies by country with the number of frequencies.

U.S. (*n* = 11)	**Australia (*n* = 16)**	**Germany (*n* = 12)**	**Hungary (*n* = 15)**	**Romania (*n* = 16)**
Offer quality/individual experiences (11)	Offer quality/individual experiences (16)	Focus on local market (11)	Positive (12)	Focus on local market (13)
Focus on local market (9)	Focus on local market (16)	Positive (10)	Focus on local market (7)	Positive (11)
Positive (8)	Positive (16)	Offer quality/individual experiences (6)	Growing demand for wine tourism (6)	COVID safety (7)
COVID safety (7)	COVID safety (8)	COVID safety (4)	Closer cooperation in the wine region (2)	Hybrid business model (4)
Hybrid business model (6)	Hybrid business model (7)	Hybrid business model (3)	Disappearance of small producers (2)	Investment (3)

The long-term outlook was seen as positive for nearly all interviewees, which confirmed data released by Ridoff [16]. Several Hungarian respondents, however, mentioned that many of the smaller wineries might not survive the crisis, which corresponds with findings by Loose and Nelgen [15], emphasising that smaller wineries were the most affected.

As indicated by Lapointe [69], the short-term focus was on the targeted local market due to travel restrictions, which benefited some more than others. Germany was in a favourable position with a large population to draw from, open borders with neighbouring EU countries, a comparatively short lockdown in the first wave, and a warm spring/summer that allowed for outdoor tastings, creating much needed prosperity.

Similar to the results published by Arora and Sharma [70], U.S., Australian, and German wineries believe that in the future, qualitative and individual experiences will characterise wine tourism. Most of them are sure that mass tourism will become less important, with wine tourists looking for special, tailor-made offers. Australian and American wineries will also continue to focus on unique quality experiences as their value proposition to encourage visitors to return to the winery. These had created a strong connection with the brand, so there was an increase in sign-ups to join the wine club, thus creating a commitment to regularly purchase and remain involved. In the Eastern-European countries, this aspect was not mentioned during the interviews, perhaps because wine tourism is still nascent there despite the long history of their wine culture.

Operating with a hybrid business model and attracting customers to both the physical and digital space was a valuable business strategy. It was vital to keep nurturing the customer connection through virtual experiences, engaging social media posts, tempting gift packs, and the lure of a future visit. Other researchers, such as Akhtar et al. [71], also underline the importance of virtual tourism and state that this kind of tourism will be able to replace mass tourism in the future. In our study, almost all wineries from all five countries see digital solutions in the future only partially, and they do not want to forego the live experience of being in the winery. As an American winery manager stated, " . . . with every event that we plan now, there will also be a question asked—can we do it virtually too in the future?". In their study, Szolnoki et al. [24] found that the wine industry assumes the coexistence of online and live wine tastings, but the number of online events may drop as soon as restrictions disappear.

COVID safety measures and practice played a key role in the return of visitors, beginning with images and information on the website, COVID-safe logos, workers wearing masks, welcoming photos of seated, socially distanced experiences. The message of safety was first and foremost, giving assurance to customers, garnering trust, and backing it up with substantial investment in hygiene, staff training, signage, and contact tracing. They were all aware that visitors were taking photos, uploading them to social media and writing reviews, which would help encourage further visitation if people felt reassured. No one wanted a scandal that would jeopardise trust in their brand. These findings are in line with the results publised by by Demir [72].

It is evident from the responses above that the New World countries have highly developed wine tourism strategies with quality experiences at their core; these wineries are ready to operate through physical as well as virtual channels. The Old World is perhaps more traditional in the sense that tourism centres around local wine, history, and nature without perceiving the necessity, at this time, for expanding on the experiential offer.

5. Conclusions

This research offers initial insights into new sustainable wine tourism strategies that were developed in Australia, the U.S., Germany, Hungary, and Romania during this unprecedented time. This study could be considered as a valuable contribution to aid wineries in their resiliency planning.

The research objective of this study was to identify new wine tourism initiatives (RQ1) and resilience strategies (RQ2) that were formulated to mitigate the disruption of COVID-19, analysing the perspectives of wine tourism in the future (RQ3).

Analysing RQ1, we can conclude that the most important initiatives were in the areas of CRM database management, promoting DTC sales and digitalisation, holding virtual events and tastings, and offering new product delivery methods, albeit to a very different degree, in the five-country comparison. "Technologies have always been [. . .] a tool to build tourism resilience in crisis" [73], and the acceleration of digitalisation seen in these findings confirms that. Using at least one of these initiatives was acknowledged as the most optimal way to compensate for loss and maximise returns for the short and long term. Comparing the answers from experts of New World and Old World countries, there is a significant difference in the importance of certain initiatives and adaptation strategies. While all five countries focused on virtual events and digital platforms, the U.S. and Australian wineries often had a CRM database and digital infrastructure in place to either be proactive or fast movers.

Regarding RQ2, cross-national differences played a more important role than in the case of RQ1. Wineries interviewed from the U.S., Australia, and Germany agreed that building up a business based on CRM and DTC, as well as accessing wage subsidy schemes, were the most important drivers of a resilience strategy. In Hungary and Romania, the orientation towards direct sales and CRM systems were not of great importance and it appeared that in these countries, wineries tried to solve the problem in unique and individual ways. Another cultural difference here was in a mindset based on innovation and agility that was mainly mentioned by New World wineries. U.S. and Australian wineries also incorporated wine clubs into their recurring revenue stream, which lays a strong foundation for financial resilience as an internal measure; this contrasts with the fact that the majority of European wineries acknowledged that external government support was a key to maintaining staff and business continuity during this crisis.

As the research revealed, the future outlook for wine tourism (RQ3) was optimistic in all five countries participating in the study. The form it will take, however, may vary. Many interviewees were already developing hybrid operation business models, incorporating virtual wine tourism experiences alongside elevated onsite cellar door tastings. This accelerated digital approach resonates with the phrase from popular culture and the title of the UN Global Sustainable Development Report 2019: "The Future is Now" [74]. It also refers to leveraging the strategies developed as a response to COVID beyond the current crisis. Regardless of the geographical and cultural differences, forecasting the future rise of local tourism was one of the most important outlooks interviewees mentioned. In addition, wineries, especially in the U.S., Australia, and Germany, propose individual wine tourism experiences as a new future tool.

5.1. Scholarly and Managerial Implications

As one of the main scientific implications of this paper, we emphasise the need to analyse the reaction of wineries to the crisis, in the field of wine tourism. Therefore, this study aims to fill the gap of missing scientific literature in wine tourism activities during the COVID-19 pandemic. Another scientific implication concerns the international context of the survey. With the help of this global survey, cross-national similarities and differences between five countries and the rest of the world have been analysed in terms of wine tourism during COVID-19.

Regarding managerial implications, these findings can be used as a catalogue of best strategies in the field of economic and social sustainability. Although there are great cultural differences in terms of initiatives and strategies, the adaptation effect in the future should not be underestimated. As a complement to current operations, the new initiatives have the potential for longevity because in many cases the effort and investment have now been made and can, therefore, be used profitably in the future. Additionally, the sustainability of virtual tastings and events for private, corporate, and trade customers were discussed above, but the extent to which they are a complement or substitute to physical visits is yet to be seen. It also proved to be of additional benefit in Australia and the U.S., where there is a higher exposure to climate change (i.e., fires, droughts), where wineries are geographically diverse, and where the customer uptake was strong. The emerging field of "eWine Tourism" reflects the potential and need for wineries to attract customers and interact with them online [75]. As recent digital initiatives during the crisis have shown, perhaps this could now be extended to include a new form of eWine Tourism in order to reach non-traditional customers, who like wine but would never (or rarely) visit a winery.

The research also showed that the responses to the COVID-19 crisis were not driven alone by the specifics of the different lockdown measures in various countries, but it also reflects a trade-off between other factors, such as environmental (fires and drought), social (population size, the need to attract local customers), business strategies (diversity of sales channels, recurring revenue models), and existing business cultures and traditions (openness to innovation, access to funding, use of resources). These findings are in line with the results published by Gricar et al. [75] who analysed sustainable determinants, among others weather conditions that affect tourist arrival. Regarding the last factor, the New World wineries proved to be more progressive in their vision with a higher appetite for risk-taking when adapting to a fast-changing trading environment.

The insights of this research form a preliminary suggestion for best practice strategies that wineries engaged with wine tourism may consider helpful in their future business planning.

5.2. Limitations and Further Research

Although the results from 70 interviews are a valuable contribution, it is by no means representative and caution should be taken if generalising these results to indicate changes to the industry as such. It is not representative because of the number of wineries per country; the limited number of countries analysed; the exclusion of wine tourism markets like Italy, France, and Spain (who suffered significantly under the COVID-19 travel restrictions, affecting their large wine tourism sectors); the size and structure of the wineries included in this study are not directly comparable; only the impact of the first wave of COVID was captured; and the probability that wineries less initially affected, e.g., Europe, during the first wave, will have to change their measures in the second and third wave. The intention of this study was to lay a basis for further qualitative and quantitative research in this field.

Future research in this field would require more quantitative data to prove the findings of this qualitative survey. Further quantitative research conducted in conjunction with businesses that offer wineries an online platform for their wine tourism products, or regional/national wine associations, is another valuable way to quantify responses in order to highlight areas for deeper academic research into adaptation, initiatives, resiliency, and future paradigms for the wine tourism industry.

In addition, using formalised models is suggested for conducting future research in this field. To this purpose, it would be beneficial to use frameworks for benchmarking business models and resiliency in wine tourism, such as that proposed by Alebaki et al. [19], "which comprises indicators and measures associated with the context of the wine tourism destination, supply and demand factors, as well as resilience, both actual and perceived".

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