A Tourism Plan for the Wine Cluster of Binissalem

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EXECUTIVE SUMMARY

Can a wine cluster be transformed into a tourism cluster? To answer this question, this report focuses on the wine cluster of Binissalem and its features in order to develop an adequate tourism plan to reach this transformation. Therefore, an enotourism plan called *"Mallorca Wine Experience"* is exposed below in order to change the Mallorcan tourism situation, based on Sun & Sand tourism, in the long-term through three approaches (Business, Cultural, and Economic/Regional), each one composed by different outputs and activities and their own monitoring indicators. Accordingly, as business approach, it intends to improve the current tourist situation of the wine cluster of Binissalem; as cultural approach, it will provide a permanent place where the Mallorcan wine culture will be divulged in a strategic location; finally, as economic/regional approach, it will enhance the Balearic economy through the promotion of production and employment.

The data collection methodology has been based on four pillars: the analysis of previous research and different sources about wine tourism and wine clusters, the participant observation technique, the secondary quantitative data collection from Official records, and the design of two questionnaire types (primary data).

The results obtained from this Technical Report are expected to be used in a practical and useful way in order to diversify the tourism possibilities that Mallorca offers, providing a seasonally and sustainable adjusted complement to the Sun & Sand tourism in the long-term.

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1. INTRODUCTION

Mallorca has been an important tourism destination since the period 1951-1960. Jointly to the economic recovery of post-war in Europe, the fact that Spain went out of the politic isolation in 1951 helped the recovery of the tourist demand, which was consolidated with the Stabilization Plan of 1959. These factors favoured mass tourism's development (i Pons, 2000), to the point that Balearisation became a term used in tourism and sustainability research to define the abuse of urbanization of the coast as a consequence of the mass tourism (Cirer, 2009). Therefore, it is necessary to develop a new tourism approach in Mallorca that leads to a sustainable tourism, that at the same time involves the local residents and strengths our identity and our culture, fosters sustainability and reduces seasonality.

Wine tourism (also called enotourism) represents this new tourism approach through a recreational experience where the tourist can involve him/herself in an "active tourism" in touch with nature and can taste and purchase wines, visit wineries, participate in some parts of the wine elaboration process, etc. From the monetary point of view, enotourism can provide an income complement to maintain the farms where the wine is produced; furthermore, it allows better product diffusion. Wine tourism is defined by three components: wine, culture as a heritage and gastronomy, and the destination itself; all of these components promote a sustainable tourism and determine the tourist profile.
It is expected to have a tourist profile with a specific interest, therefore with a higher fidelity and lower sensibility to the price, comparing to the Sun & Sand tourism (Getz & Brown, 2006).

In numbers, it is possible to confirm that enotourism has been strengthening across the years. In 2013, in Spain, wine tourism increased its visits by 18.08% with respect to 2012; in 2014 it increased by 25.75% and in 2015 it increased by 5.59%, compared to the respective previous years. Although in 2015 the increase is the lowest, wine tourism is growing every year, with the routes from D.O. Penedès and D.O. Jerez being the most visited. In addition, according to the distribution throughout the year, Autumn and Spring are the preferred seasons for enotourism, comprising the months of September, October, April, and May (ACEVIN, 2014, 2015, 2016).

There are two development models of enotourism destination: one from the "Old World" (European wine-producing countries) and other from the "New World" (United States and Australia). The main difference between two models is that in the "Old World" the enotourism has not started until 1990s while in the "New World" the enotourism had developed simultaneously to the wine farms. Furthermore, in "Old World", the enotourist appreciates the quality of raw materials, the region where the wine is produced, the wine-producing method, and also the regional products; by its side, in "New World", the enotourist appreciates wine-related events and the tourist facilities such as accommodation and infrastructures to visit the wine region. In other words, in the "Old World" wine is understood as a cultural product while in the "New World" it is understood as a ludic product (Vilà Falcón, 2010).

In this context, Binissalem is a well-known area in the island of Mallorca, within the Autonomous community of Balearic Islands (“Old World”), which has a long-standing tradition of wine production (de Oleza, 2000). The wine cluster of Binissalem is currently composed by 13 wineries and their vineyards distributed across five municipalities: Binissalem, Consell, Santa Maria del Camí, Sencelles, and Santa Eugenia; as a wine production region, it became a *“Denomination of Origin”* (D.O.) at the end of 1990 and since then it has been increasing in wineries, production, viticulturists, and hectares (D.O. Binissalem, 2016a). Thanks to participant observation technique, it is known that the main market for Mallorcan wines is the island itself, especially in the catering sector; even though Mallorca is the main market, insularity plays an important role to position wines in the Mallorcan market (especially in supermarkets, not so much in restoration) because having to buy abroad or from the Iberian Peninsula the material for the production of wine, which causes that the Mallorcan wines have a higher price than the imported wines. Another crucial point from the data presented above is the fact that rosé wines are still the most unknown in the wine market.

In order to take advantage from the wine cluster of Binissalem, its natural resources and cultural heritage, an enotourism plan is proposed as a hub around the wine culture. This tourism plan aims at overcoming the main difficulties that the wine cluster currently presents and also to take advantage from the challenges. The development of plans for wine regions is a properly way to enhance their culture and identity. Closely to Spain, the north of Portugal gives an example of two D.O. wine regions that have developed a successful agritourism plan: Douro, which contains the Demarcated Region of Port Wine, and Tamega, which contains the Demarcated Region of Green Wine (Marques, 2006).

Therefore, the tourism plan developed in this Technical Report is called *“Mallorca Wine Experience”* and is oriented to transform the wine cluster into an enotourism cluster in order to make a seasonally adjusted complement to the Sun & Sand tourism; this transformation will be based on three approaches/objectives: Business, Cultural, and Economic/Regional. The Technical Report will be developed in four key sections: needs assessment (section 2), where the *“Mallorca Wine Experience”* project will be explained in order to reach the proposal objectives; indicator system design (section 3), where the monitoring logical framework will be developed through the definition of the monitoring indicators from each step of the project and also the data collection process will be explained; baseline study (section 4), where there will be a description of the baseline situation prior to development of the enotourism project where the most important stakeholders will be analysed, and also the methodologies used to analyse the currently available information and build each of the proposed monitoring indicators will be described; finally, in the proposal for using the data generated (section 5), there will be a description of how to use the information generated with the indicator system so as to improve decision-making processes in the long-term.

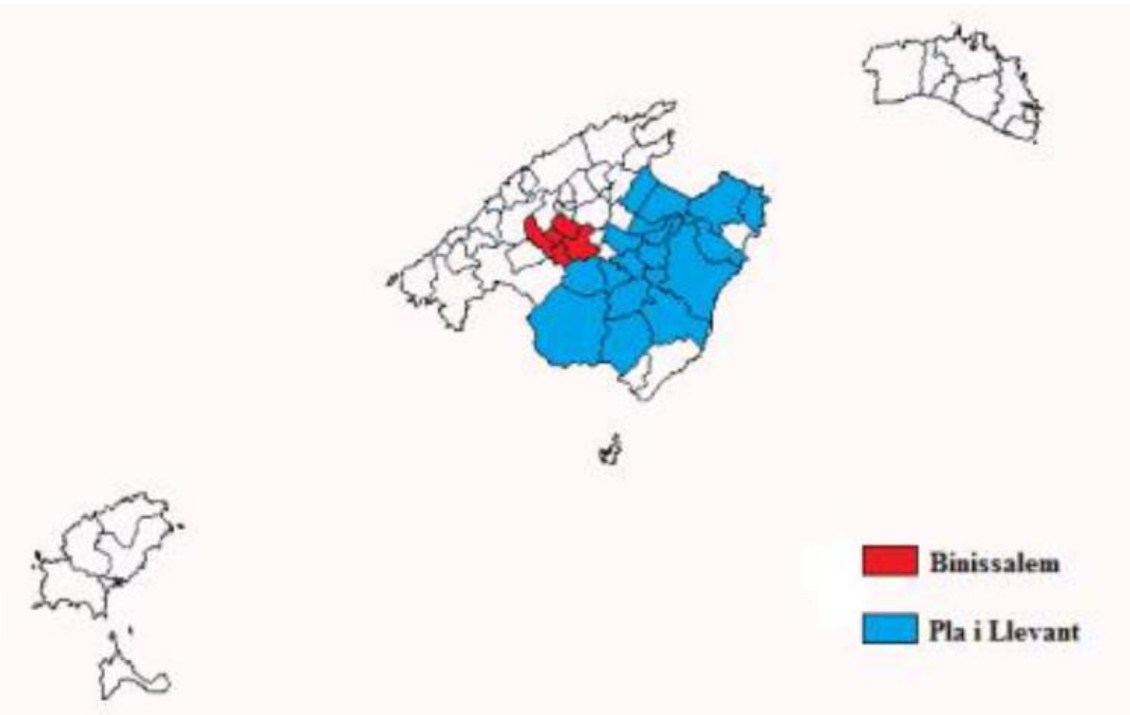
2. NEEDS ASSESSMENT / PROPOSAL OBJECTIVES

This section is structured into two subsections: current situation, and future plans. In the current situation subsection, the present situation of Mallorcan wine market is explained through the classification of Spanish wines in the context of the European legal framework while, in the future plans subsection, the features from Mallorca Wine Experience project are exposed.

2.1) Current wine situation and features of wine tourism

Currently, the Balearic Islands have two wine clusters represented by two *"Wine Designation of Origin",* D.O. Binissalem and D.O. Pla I Llevant, both in Mallorca (see ***Figure 1***). These designations reveal the characteristics of wine as an agricultural product, determined by the interaction between geographical factors and human local expertise (Agostino & Trivieri, 2016).

FIGURE 1. D.O. Binissalem & D.O. Pla I Llevant



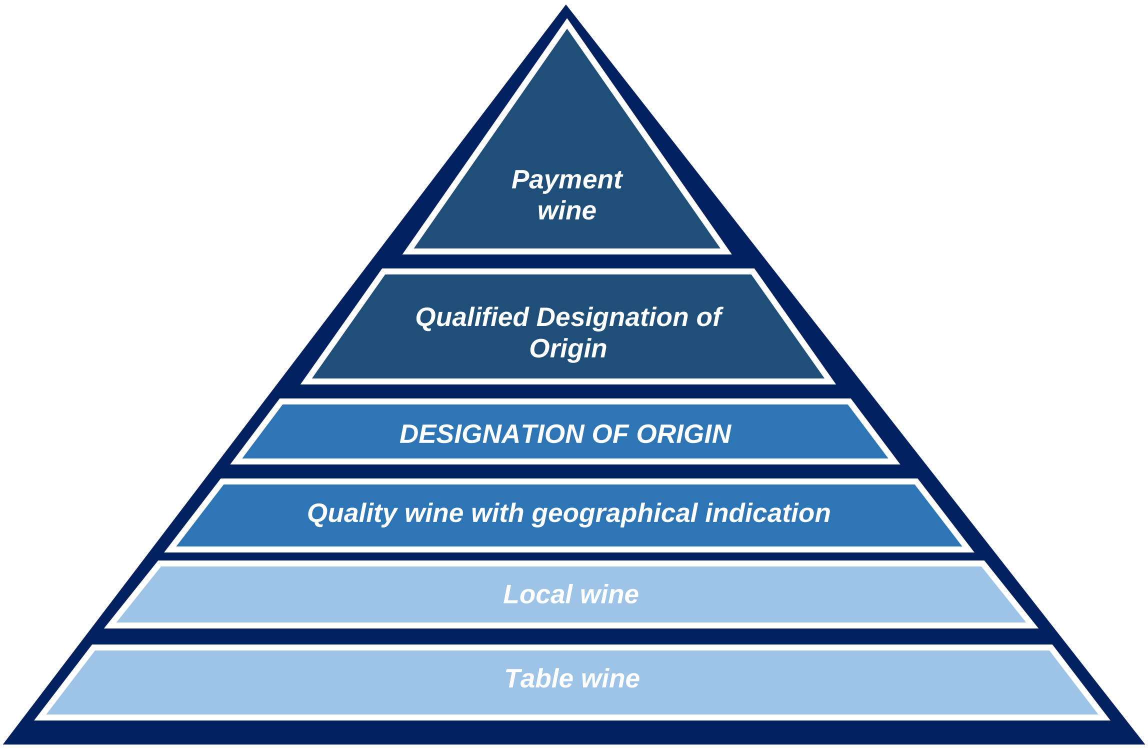
Source: Ramón Cardona & Vachiano Pol (2014)

Clusters (a more recent evolution of the Marshallian concept of industrial districts) encourage both competition and cooperation and the informal link between enterprises and institutions (Cluster Económico, 2008). Cluster is defined as a *"geographic concentration of interconnected companies and institutions operating in a particular field"* (Delgado, Porter & Stern, 2010). Another definition is given by Ramos (1998), who defines a cluster as *"a sectoral and / or geographical concentration of companies in the same activities or closely related activities, with important and cumulative external* *economies of agglomeration and specialization, with the possibility of joint action in pursuit of collective efficiency".*

The D.O. is the identity of the wine cluster and performs a crucial role in the cluster's development and success, as it is a recognition of the wine quality and the region where it is produced (Beebe, Haque, Jarvis, Kenney, & Patton, 2013). D.O. Binissalem is characteristic for its autochthonous wine varieties; *"manto negro"* is the red autochthonous variety that must be used in the elaboration of the red wines at least in a proportion of 30%; *"moll"* or *"premsal blanc"* is the white autochthonous variety that must be used in the elaboration of the white wines at least in a proportion of 50%.

Since 1992, the European Union (EU) has adopted a system for designations of origin and geographical indications to protect the collective reputation of local producers that comply with specific rules of cultivations; geographical indications may shelter producers from price competition thereby ensuring higher prices (Winfree & McCluskey, 2005). Furthermore, since 2009, logo from designations of origin and geographical indications can be added to the national designations on the label; these labels may be regarded as a certification of quality, differentiating the product (Agostino & Trivieri, 2016).
As said above, Binissalem belongs to the category of *"Designation of origin"* but in Spain there are six kinds of wines, ordered from lowest to highest degree of protection, depending on the degree of protection that wines have and therefore the regulation and control that they have to accomplish: Table wine, Local wine, Quality wine with geographical indication, Designation of origin, Qualified Designation of origin, Payment wine (see ***Figure 2***). Table wines are not required to specify origin or varieties; local wines belong to certain regions; quality wines with geographical indication are produced and processed in a certain region, where grapes must have the same origin and production is due to that place; wines from a Designation of Origin have strict quality standards and if a production area wants to be D.O., it must have been recognized at least five years before as a production region of Quality Wines; wines from a Qualified Designation of origin must accomplish stricter regulations and a more exhaustive control than previous ones and their level of protection is higher, and to access to this qualification, a production region must have been recognized as a D.O. at least ten years earlier. From all the D.O. in Spain, only two are Qualified Designations of Origin: Rioja and Priorat. Payment wine is the one which is produced in farms that are in certain areas, with extension and production limited according to the Autonomous Community in which they are (Enoarquía, 2013).

FIGURE 2. Classification of Spanish wines



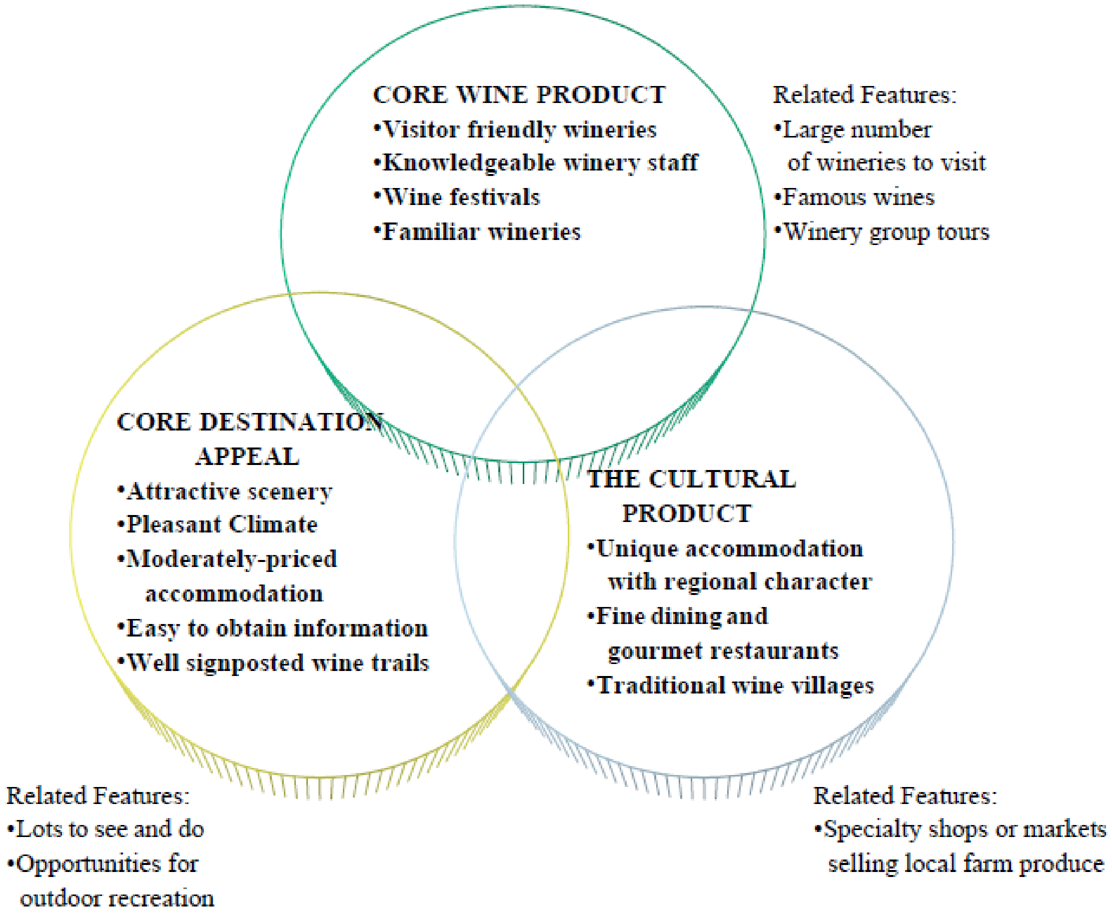
Source: Own elaboration from Enoarquía 2013

Based on a gravity model framework made by Agostino & Trivieri with data from 1995 to 2009, "*Quality Wines Produced in Specific Regions (QWPSR) are associated to higher exports values and higher probability of exporting"* (Agostino & Trivieri, 2014); thus, these authors state that *"wine makers may aim at quality and diversification granting higher prices, rather than producing large amounts bearing lower prices. Such a competitive strategy appears suitable for small producers, that are not able to exploit scale economies and compete through large volumes"* (Agostino & Trivieri, 2016).
Other authors such as Schamel (2006) highlights the influence that regional reputation may have on price, concluding that export quality controls combined to marketing strategies valorising the origin can benefit emerging and traditional producer countries.

Regarding wine as tourism approach, the critical features of the wine tourism experience from the customer perspective are supported by authors, such as Beebe, Haque, Jarvis, Kenney & Patton (2013), who assert that *"for many successful wine-producing industrial districts, winery tasting and tours, special events such as festivals and the hospitality trades as well as the intangible scenic experience obtained by driving through wine country, are economic phenomena nearly as important as the wine exports".*
As shown in ***Figure 3***, the critical features of the wine tourism experience are composed by three perspectives: the wine product, the wine destination, and the cultural components of this destination. According to this, wine tourism is more than visiting wineries or drinking wine; wine tourism is a cultural and sensory experience around the wine product. In this context, the term *"touristic terroir"* is

used to describe the combination of physical, cultural and natural environments that give each region its distinctive as a destination for wine tourists (Hall & Mitchell, 2002).

FIGURE 3. Critical features of the wine tourism experience from the customer perspective



Source: Getz & Brown (2006)

2.2) Future plans

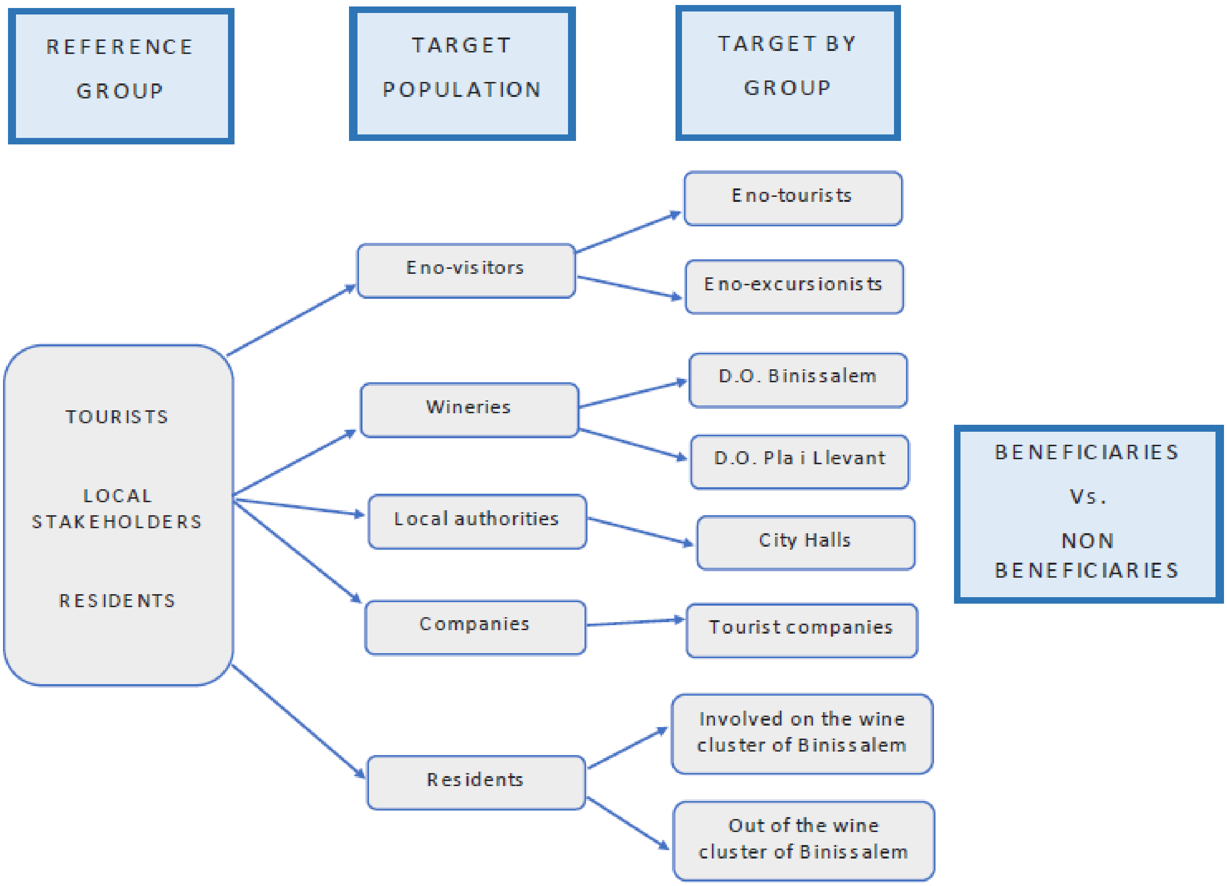
The Mallorca Wine Experience plan is centered around the construction of a wine tourism area and will be developed to diversify the tourism possibilities that Mallorca offers, making for a seasonally adjusted complement to the Sun & Sand tourism in the long-term. It is an enotourism experience project that intends to join all the wine-related activities in a specific place, where the emotional component is the key. This project is based on the *"Catalan Wine House"* from Lluís Tolosa, sociologist and writer, and it is also inspired by Vivanco from the D.O. La Rioja that has an Experience foundation winery.

Thanks to this project, all the wineries from the wine cluster of Binissalem will have the same visibility, no matter the size or power they have in the D.O. An important strategy to "sell" abroad the D.O. Binissalem is through a Mallorcan brand; in order to do this, Mallorca Wine Experience should join both Mallorcan designations of origin: D.O. Binissalem and D.O. Pla i Llevant. In this way, it is easier

to create awareness about Mallorca as a wine producer; strategically, it will be operating the whole year, except for the chill-out wine bar on the rooftop of the building around which the plan will be centered, which will be opened only in Spring and Summer. Mallorca Wine Experience intends to transform the old concept of enotourism, as visits to wineries, in a cultural concept where wine is understood as a part of our culture, gastronomy and history.
The project has three approaches/objectives: Business, Cultural, and Economic/Regional. As business approach, it intends to improve the current tourist situation of the wine cluster of Binissalem; as cultural approach, it will provide a permanent place where the Mallorcan wine culture will be divulged in a strategic location; as economic/regional approach, it will enhance the Balearic economy through the promotion of production and employment. The activities taken to achieve the objectives will be explained in the next section (section 3).

Mallorca Wine Experience will impact on tourists, local stakeholders, and residents. Specifically, it will influence enotourists and enovisitors, on both Mallorcan D.O.s because of the strategy to “sell” a wine Mallorcan brand, on the councils from municipalities that compose the D.O. Binissalem, and on the tourist companies. In addition, residents in and out of the wine cluster will be affected in the long-term; those who are involved will be economically directly affected by the project, and those who are out of the cluster will be affected by the multiplier effect of the Mallorcan economy derived from the enotourism activity. In all the influenced groups there will be some who will benefit more than others.
Figure 4 shows that the target population of the enotourism plan is structured in five key groups: eno-visitors, wineries, local authorities, companies, and residents. Specifically, the enotourism plan will impact on eno-tourists and eno-excursionists because the Binissalem wine cluster will improve as enotourism destination; it will also impact on both Mallorcan D.O.s due to the D.O. Pla I Llevant is included in the enotourism plan. In addition, it will affect City Halls and tourist companies because they are involved stakeholders. Finally, both type of residents, involved and out of the wine cluster, will be benefited from the wine project.

FIGURE 4. Target population



Source: Own elaboration

As Mitchell & Hall (2001) said, it is expected to have *"middle aged, highly educated, professional or managerial, with above average income"* winery visitors (eno-visitors). Other authors corroborate this enotourist profile describing an enotourist with an age ranged from 35 to 44 years, with university studies, living as a couple/married, employee, and with a household income per month over 3000€ (Gómez, Lopez & Molina, 2015).

3. INDICATOR SYSTEM DESIGN

Indicator system design section is divided into three subsections with their respective subparts: description of methodology, results of questionnaires, and proposed monitoring indicators.
In description of methodology subsection, a description of data collection process is exposed; the subsection of results of questionnaires is, in turn, divided in two subparts, one for each questionnaire type results. Finally, the subsection of proposed monitoring indicators is, in turn, divided in four subparts, depending on the type of indicators.

3.1) Description of methodology

In order to develop an adequate project, the first step has been to analyse previous research and different sources about wine tourism and wine clusters. After that, an appointment to visit some wineries was arranged in order to carry out participant observation and in this way know in first-hand the reality of the wine cluster; some other activities like fairs (Wine Days Mallorca, 14-22 May 2016), exhibitions, wine trips, tasting courses, etc, may be carried out in order to increase the knowledge of the wine cluster. In participant observation, the researcher gathers information by being an actual participant with the subjects being studied and he/she may be known by the subjects as a researcher or may be incognito (Vidich, 1955).

Then, in order to construct the Mallorca Wine Experience project, at baseline study, described in the following section, has been developed. This baseline study has two different levels: from secondary quantitative data from Official records such as European Commission, Agricultural statistics of Spanish government, International Organisation of Vine and Wine (OIV), Statistical Institute of the Balearic Islands (IBESTAT) where it is possible to obtain data from FRONTUR and EGATUR, in order to characterize quantitatively the current situation of both tourism and wine sector in Europe, Spain, Balearic Islands and Mallorca; and using questionnaires (primary data).
Two models of questionnaires have been conducted by email, phone, and in some cases face-to-face, in order to get information about the current situation of the wine cluster. Since the information retrieved from the questionnaires is used to build the monitoring indicators, it will now be explained in detail. The full text of the questionnaires is reproduced here in English together with the answers, but in the Appendix the original Catalan version is provided just as it was distributed locally.

3.2) Results of questionnaires

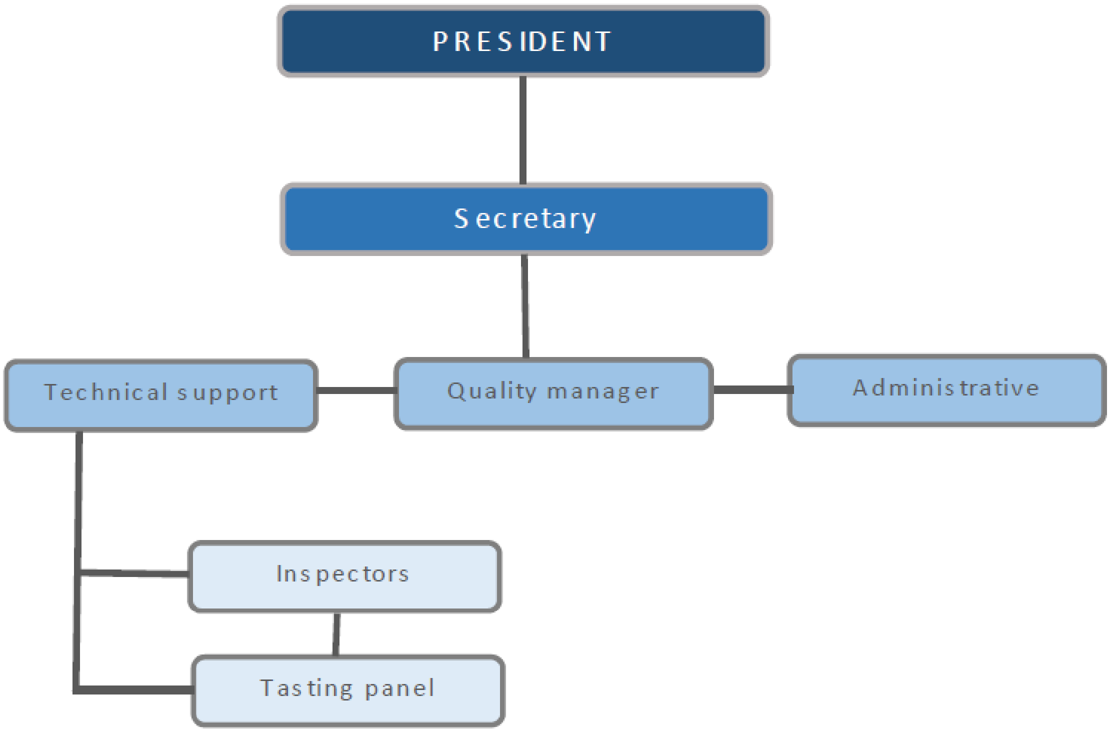
In this section, results from both questionnaire models (Regulation Council & Winery questionnaires) will be analysed in order to establish the current situation of the wine cluster and to develop the monitoring indicators to be used during the implementation of the project.

3.2.1) Regulation Council

In the D.O. Binissalem, as in all the D.O., the Regulation Council plays a key role in the wine production because is the governing body of the D.O., where the vine-growing and wine-producing sectors are represented. It controls the entire production and commercialisation process of the product; this includes the vines (varieties, cultivation techniques, production), harvesting, production, ageing, bottling, the quality of the wines included, and their marketing. All the wine covered by the D.O. Binissalem must come exclusively from the vineyards inscribed in the *"Vineyards registry from the D.O. Binissalem"* (D.O. Binissalem, 2016a).

The Regulation Council questionnaire is divided into three sections: wineries, promotion, and aids and collaborations. This questionnaire has been handled by email. In addition, at the end of the questionnaire the Regulation Council was asked to provide an organization chart that is reproduced in ***Figure 5***.

FIGURE 5. Organization chart of the Regulation Council D.O. Binissalem



Source: Regulation Council questionnaire

Wineries

1. If there is a fee to belong to the D.O. Binissalem

There are different fees (for initial registration, annual fee, and by wine made) for wineries and winegrowers.

2. Why some wineries, such as Macià Batle, do not have visibility on the D.O. webpage neither in the Winedays programmation

Even though in the Macià Batle webpage it is stated that this winery belongs to the D.O. Binissalem, no information about the winery have been found in the D.O. webpage neither in the Winedays programmation. This is because Macià Batle does not belong to the D.O. Binissalem anymore.

This question intends to find possible problems in the marketing communication of D.O. Binissalem and problems related to the visibility across wineries.

3. If there is any winery in the process of affiliation to D.O. Binissalem

Currently, there is not any winery in the process of affiliation to D.O. Binissalem.

Promotion

1. If there is any App from the D.O. Binissalem

There is not any App from the D.O. Binissalem.

2. If there is any informative magazine from the D.O. Binissalem

There is not any wine magazine from the D.O. Binissalem.

3. Which are the promotional activities during the year

The Regulation Council carries out promotional activities such as to organize the Winedays Mallorca, present wines from the D.O., promote cultural events around wine, tasting courses, brochures edition, etc…

Aids and Collaborations

1. If the D.O. Binissalem belongs to the Spanish Association of Wine cities (ACEVIN)

D.O. Binissalem does not collaborate with the ACEVIN wine association because the D.O. does not believe that is interesting right now.

2. If there are interventions by the private sector to develop enotourism activities

Cooperation between public and private sector is quite good due to the intervention by private companies such as *“Mallorca Rutes”* and *“Mallorca Wine Tours”* to develop wine tourism activities.

3. *If the Regulation Council receives any European and / or Balearic financial assistance*

Regulation Council receives assistance from two funds. FEADER *("Fondo Europeo Agrícola de Desarrollo Rural")* and FOGAIBA *("Fons de Garantia Agrària i Pesquera de les Illes Balears")* are the funds that contribute to the wine cluster development.

In addition to the data obtained from the questionnaire, in the Regulation Council section of the D.O. Binissalem webpage, it can be found that in 2013 the wine commercialization from the D.O. Binissalem by destination was 85% to the Balearic Islands, 11% to the European Union, 3% to other countries, and 1% to Spain. In addition to this, in 2013 the commercialization by wine type was 61% red, 24% white, and 15% rosé (D.O. Binissalem, 2016a).

3.2.2) Wineries

Winery questionnaires are divided into four sections: general information, features of winery, distribution and services, visit features, and visitor profile. These questionnaires have been handled by email, phone, and face-to-face, depending of each case.

From the 13 wineries that belong to the D.O. Binissalem, it has been obtained six answers have been obtained. This number of answers can be explained by the current tourist situation that makes it difficult to obtain an answer; this tourist situation is currently defined by a great number of tourists at the wine cluster, which was alluded by some wineries in order to justify their lack of time to answer the questionnaire.

General information

In this section, some informative data from each winery that answered will be presented.

Ranking of average annual production:

1. Bodegas José Luis Ferrer: *675 000 liters*

2. Antonio Nadal Ros Bodegas y Viñedos: *100 000 liters*

3. Bodega Biniagual: *90 000 liters*

4. Jaume de Puntiró: *60 000 liters*

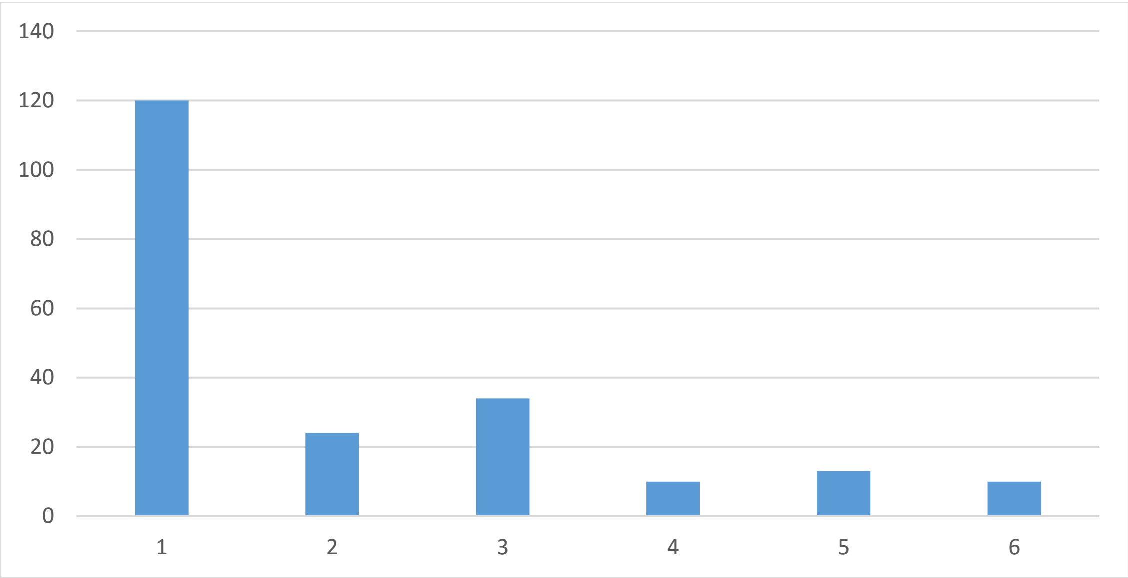
5. Vinya Taujana: *50 000 liters*

6. Celler Sebastià Pastor: *40 000 liters*

This ranking provides a vision about the power of each winery in the wine cluster as a wine producer. Using data from the biggest and the smallest wine producers, it is possible to determine the answer ranges.

In ***Figure 6*** it can be appreciated how the first winery in average annual production is also the first in hectares of crops.

FIGURE 6. Hectares of crops by ranking of average annual production



Source: Own elaboration

**Note that each number in the figure corresponds with the winery from the average annual production ranking.*

Regarding bottle price, the medium price ranges from 4.20 to 15.50€, the minimum ranges from 4 to 8€, and the maximum goes from 5.70 to 34€. Moreover, the number of employees at the winery ranges from 3 to 35; the average formation of employees is graduate, university, and wine elaboration courses from SOIB *("Servei d'Ocupació de les Illes Balears").*

In addition to this, regarding the profile of the person who answered the questionnaires in each winery, the professional position of this person is executive manager, sommelier, marketing, winery owner, administrator, or sales manager; three questionnaires were answered by men and the other three by women; age ranges from 26 to 43 for women while it is from 36 to 59 for men. Furthermore, the years in the wine sector go from 2 to 4 for women and from 5 to 35 for men while the years in the winery range from 1.5 to 3 for women and from 15 to 22 for men.

Features of winery, distribution and services

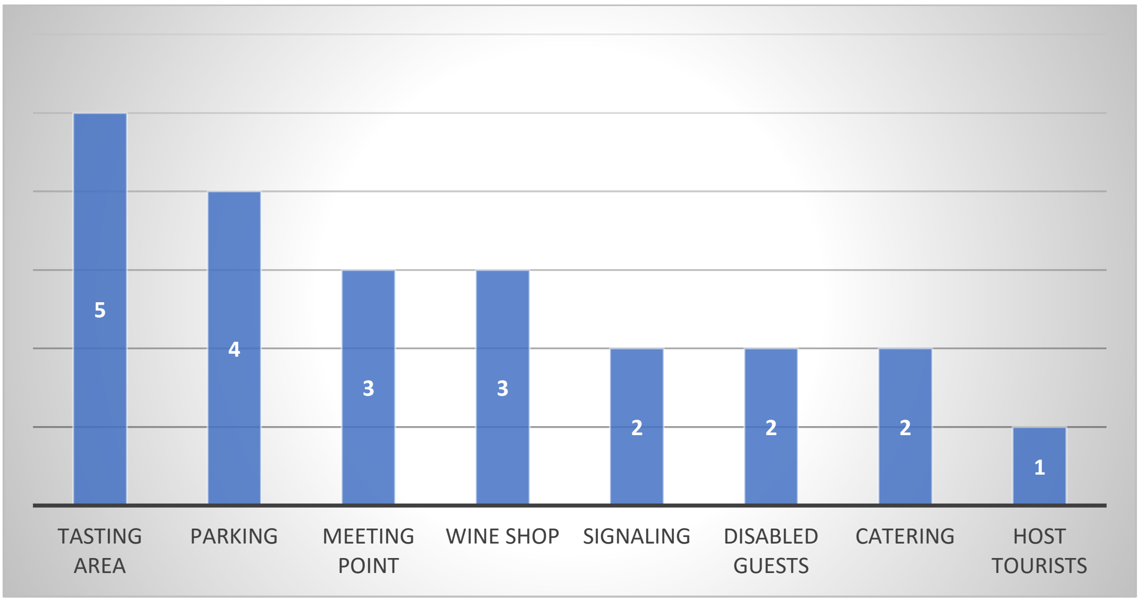
1. Winery profile

The six wineries have the four functions: Elaboration, Warehousing, Ageing, and Bottler and Packers

2. Services offered by the winery

Figure 7 shows that the most commonly offered service is the tasting area that is offered by five wineries, followed by parking that is offered by four wineries. Specialized meeting points for visitors and wine shops are offered by three wineries. Other services such as signalling, access for disabled guests, and catering services are offered by two wineries and there is only one winery that offers a service to host tourist, a concerted service.

FIGURE 7. Offered services



Source: Own elaboration

3. If regular tasting workshops are offered throughout the year

There are two wineries offering regular tasting workshops while two other wineries are not offering it. In addition, the last two wineries offer tasting workshops but only in some cases, not regularly.

4. If there is any distinguishing feature of the winery

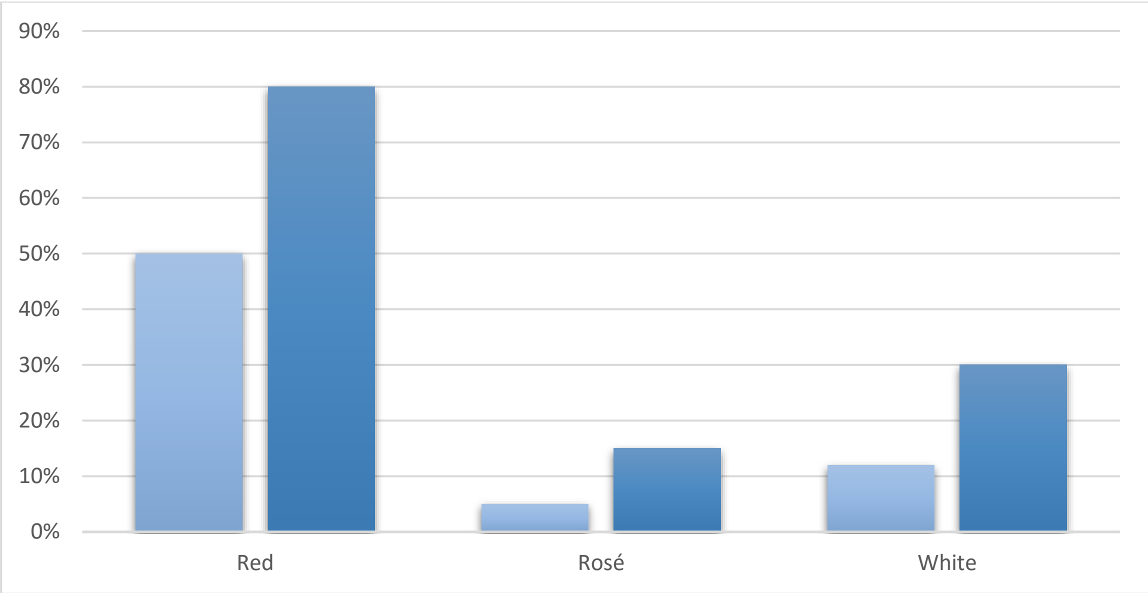
The distinguishing features mentioned were the experience in wine production (more than 80 years), traditional wine production (family owned winery), and ecological production.

5. Percentage of total production of each wine

Figure 8 shows in sharp blue the highest value while in the light blue the lowest value; therefore, it is possible to obtain the range of the percentage of each wine.

Red wine is the most consumed with a range of 50% - 80%, followed by white wine that ranges from 12% to 30%. Rosé wine has the lowest percentage of total production with a range of 5% to 15%.

FIGURE 8. Percentage of total production of each wine



Source: Own elaboration

6. *Percentage of total annual production sold in Mallorca*

This percentage has a range of 50% - 90%.

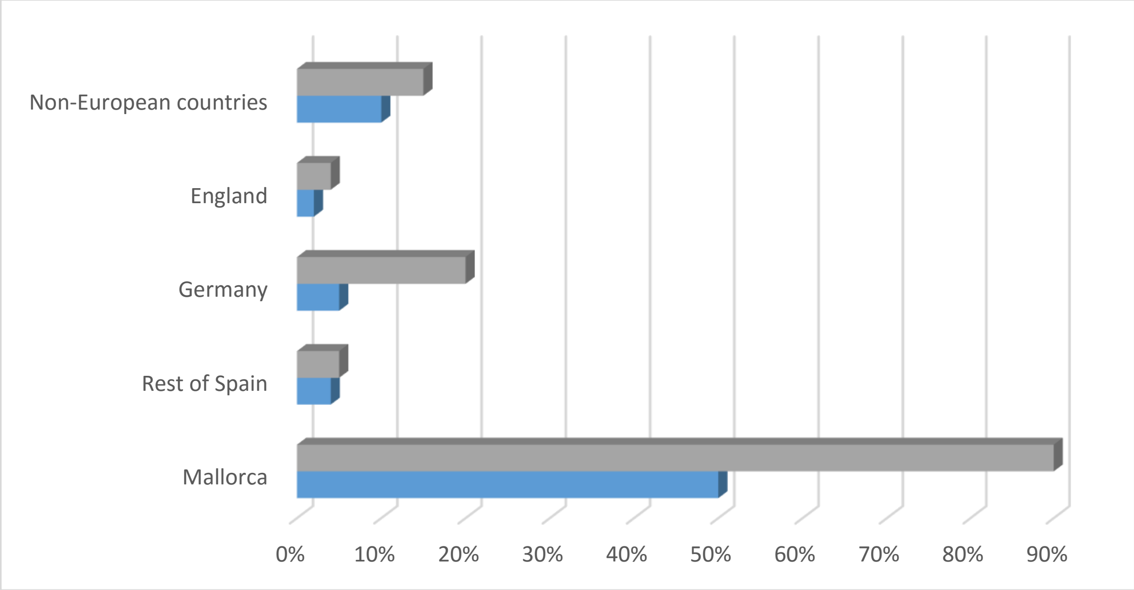
From this data, it can be concluded that the domestic consumption is key for the Mallorcan wine production.

7. *Wine distribution: Country target of the D.O. Binissalem wines*

Figure 9 shows in grey the highest value while in blue there is the lowest value; therefore, it is possible to obtain the range of the percentage of country target.

As was said, domestic consumption predominates with a range from 50% - 90%. Germany has a range in wine consumption that goes from 5% to 20%, followed by the range of 10% - 15% from the non-European countries; the rest of Spain has a range from 4% to 5% while the lowest range is from England with 2% - 4%.

FIGURE 9. Country target of the D.O. Binissalem wines



Source: Own elaboration

8. If the winery receives any European and / or Balearic financial assistance

Only two wineries declare receiving an occasional agricultural financial assistance, therefore it might be that it is the Regulation Council who receives financial assistance and determines which winery needs assistance.

9. If there is a wine shop in the winery

All the wineries have a wine shop.

10. If the winery sells own wine-related merchandise

Four wineries declare that they do not sell their own wine-related merchandise.

11. If the winery carries out some specific actions intended to achieve a sustainable wine production

All the wineries carry out specific actions such as the use of solar panels, rain (not irrigation), and having ecological vineyards, to achieve a sustainable wine production. This fact gives additional value to the production process due to the current concern about sustainability by the tourist and the society in general.

12. If the winery has quality distinctions about traditional wine production: Craft business and / or wine master craftsman qualifications

From the six wineries, only two have these quality distinctions related to traditional wine consumption.

13. If the winery has any private area where events can be celebrated

Only half of the wineries have a private area to celebrate events.

14. If vineyard is close to the winery

Half of the wineries have their vineyard close to the winery; this fact makes it easier to include it in the visit. Visits to the vineyard are a good way to include the attractive landscape of the region.

15. If the winery organizes wine workshops for youth and school groups

Only half of the wineries organize wine workshops for youth and school groups.

16. If there is wine tourist loyalty

Five wineries state that there is wine tourist loyalty at the winery.

17. Where there is more competition (Inside or outside the D.O. Binissalem)

It can be concluded that competition comes from, mainly, La Rioja and Ribera del Duero.

Visit features

1. If the winery offers arranged or timetabled visits

Four wineries only offer arranged visits while the other two offer both arranged and timetabled visits.

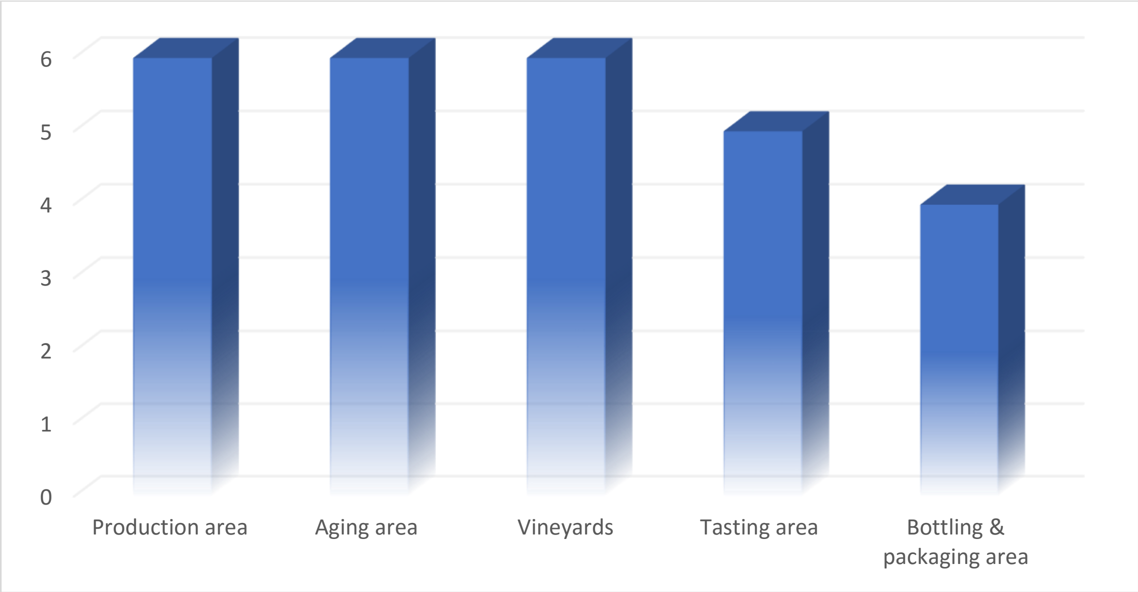
2. In the case that visits are not currently offered: If the winery intends to offer visits in the future

This answer has not been answered by any winery because all of them currently offer visits.

3. Which are the visited places in the winery

As shown in ***Figure 10***, the most visited places are the production and the aging area, and the vineyards. The tasting area is visited in five wineries while the bottling and packaging area is visited in four wineries.

FIGURE 10. Visited places in the winery



Source: Own elaboration

4. Which is the visit duration

Between 45 min to 2 hours.

5. Which is the visit cost

All the wineries have a visit price, where five of them have a price depending on the visit type and the other one has a single price of 10€.

6. If there is a registry of visits

Only half of the wineries has a registry of visits. Thanks to the wineries that have a registry of visits, it is possible to know that the average annual visits to the winery ranges from 500 to 9000.

Apart from monitoring enotourism, the registry of visits can be used to do mailing lists to inform about wine events.

7. Which are the months of high visits

The high season is composed by April, May, June, September and October.

Although July and August are also months with high visits, they do not belong to the high season. Therefore, it opens a possibility to diversify the tourism possibilities of Mallorca, making a seasonally adjusted complement to the Sun & Sand tourism.

8. Percentage of total annual production sold directly to the winery visitors

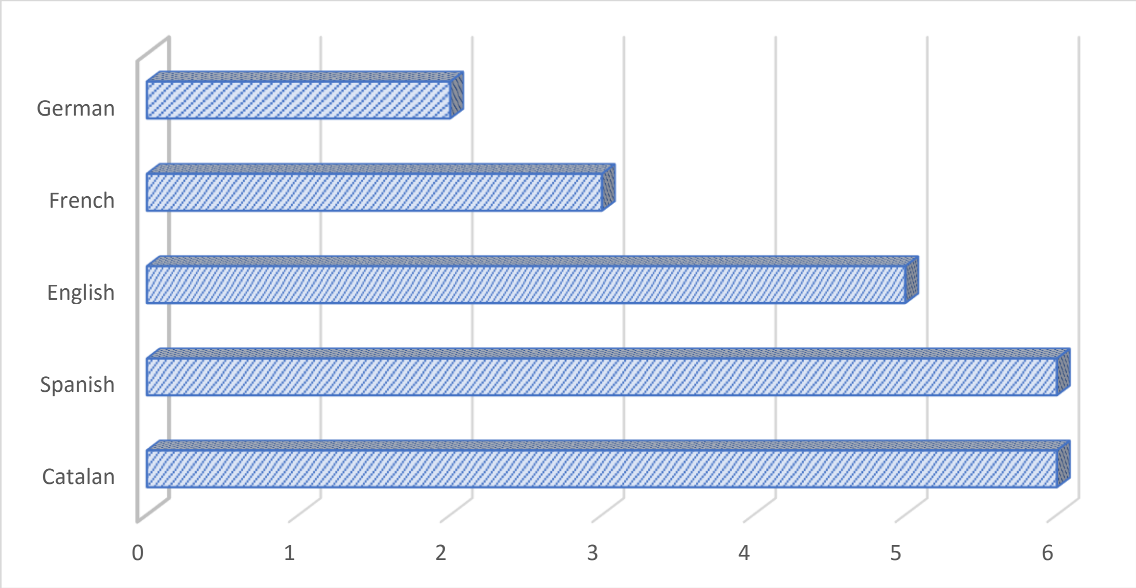
The percentage of total annual production sold directly to the winery visitors ranges from 3% to 30%. Direct sales to winery visitors are desirable because they reduce distribution costs.

9. If the visits are offered in a few languages

As shown in ***Figure 11***, apart from Catalan and Spanish, the most used language to offer visits is English by five wineries. French is offered by three wineries while German is offered only by two wineries. The frequency of foreign languages makes sense depending on the residence country of the tourists *(**Visitor profile: 4. Which is the residence country of the tourists**).*

As more languages are offered, the target population can become more diversified.

FIGURE 11. Languages used to offer visits



Source: Own elaboration

10. If the visits are offered by tourist profile

From six wineries, five offer visits by tourist profile; some examples are visits for wine experts, elderly people, schools, with lunch or dinner, with trip, and by helicopter on the vineyard.

To offer visits by tourist profile is a way to make market segments to properly adjust offers to the customer needs.

11. If there is any differentiating element of the visits related to the other wineries

Four wineries offer visits with a differentiating element such as the case of an external company that offers tours by train through the vineyards, when it is the owner who does the visits, visits that include a walk to vineyard, and the case of individualized visits.

12. If there is a person who exclusively guides visitors

Only half of the wineries have a person who exclusively guides visitors.

Visitor profile

1. Which is the average age of visitors

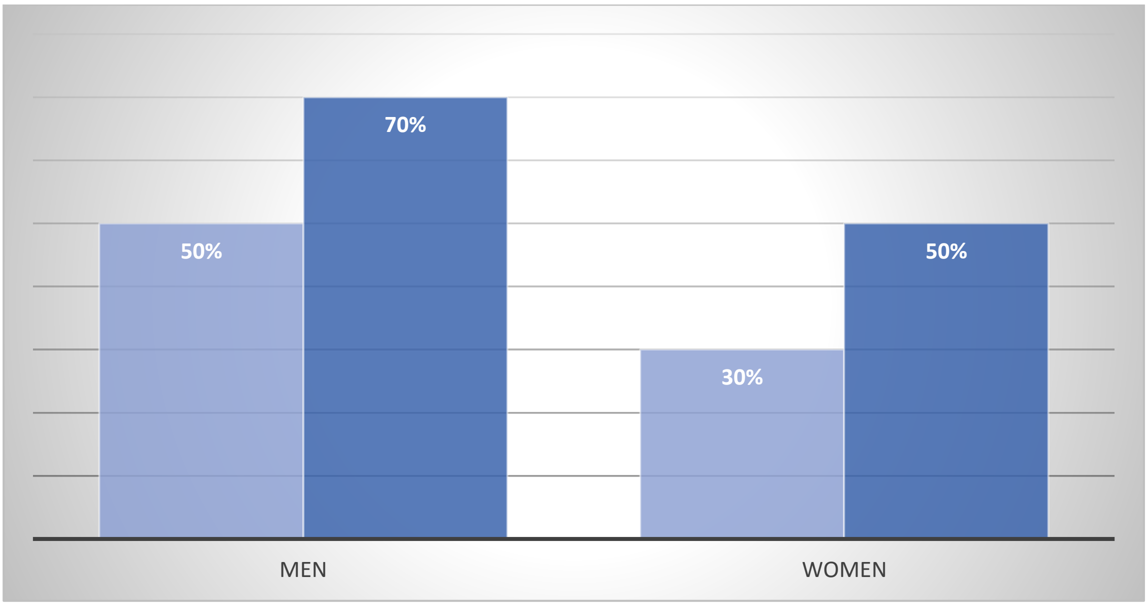
From six wineries, four answered that the average age of visitor ranges from 41 to 55 years old while two wineries said that it ranges from 25 to 40 years old.

2. Which is the most frequent gender

Figure 12 shows in sharp blue the highest value while in the light blue there is the lowest value; therefore, it is possible to obtain the range of the gender percentage.

Clearly, men are more frequent than women visiting wineries. Taking both lowest and highest value, there is a difference of 20% between genders.

FIGURE 12. Gender in visits



Source: Own elaboration

3. Which is the offered visit group size

There are four wineries that offer visits to groups, families, couples, and singles; in three of them, the most frequent visitor type is groups, followed by couples, families, and singles, in this order while the other one has a ranking lead by singles, followed by couples, families, and groups.

Also there are two wineries that only offer visits to a group of almost ten persons.

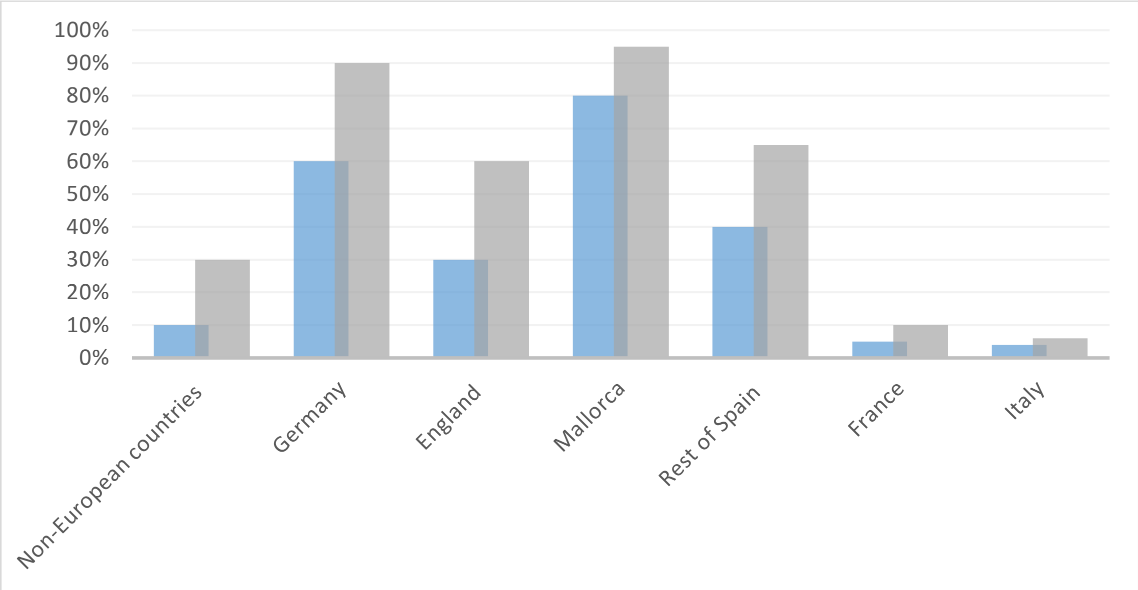
4. Which is the residence country of the tourists

Figure 13 shows in grey the highest value while in blue there is the lowest value; therefore, it is possible to obtain the range of the percentage of country target.

The highest percentage belongs to Mallorca with 80% - 95%, closely followed by Germany that ranges from 60% to 90%. England and the rest of Spain have medium values, with 30% - 60% and 40% - 65%, respectively. In addition, the group of non-European countries has a percentage that ranges from 10% to 30%. The lowest values belong to France and Italy, which ranges go from 5% to 10% and from 4% to 6%, respectively.

Crossing this data with the one obtained from languages used to offer visits, it can be concluded that it is necessary to increase the use of German to offer visits.

FIGURE 13. Residence country of the tourists



Source: Own elaboration

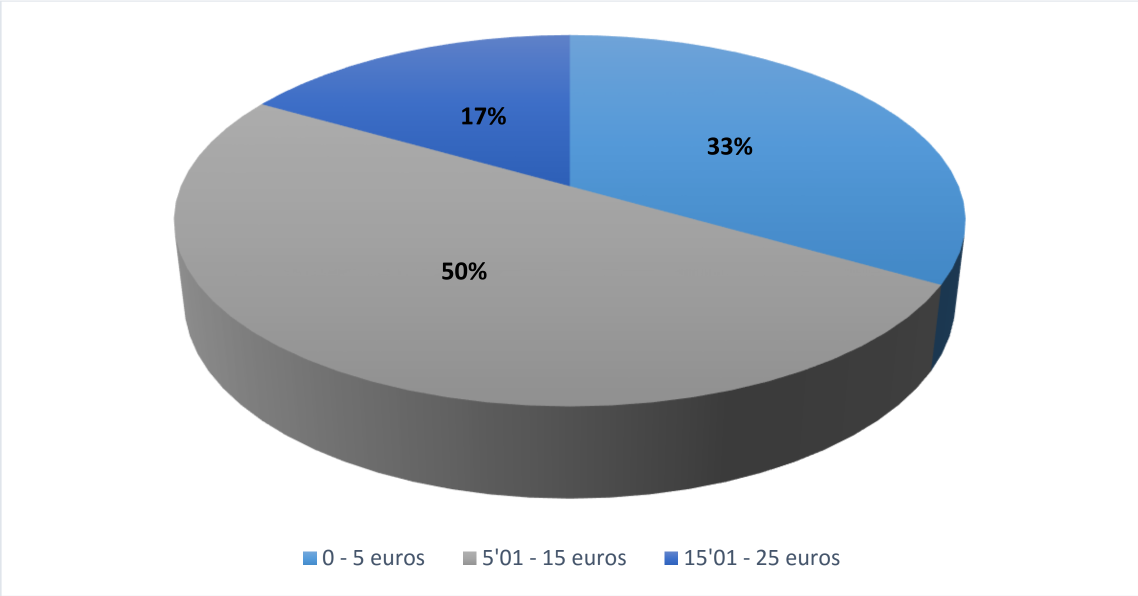
5. Which is the average wine knowledge by the tourist

Half of the wineries proclaim that the wine knowledge of the tourists is low while the other half declare that it is medium.

6. Which is the average tourist expenditure in the winery (visit price is not included)

Figure 14 shows that three wineries answer that the tourist expenditure in the winery, without the visit price, is between 5.01 and 15 euros; two wineries said that it is from 0 to 5 euros; the last one, proclaim that it is higher, between 15.01 to 25 euros.

FIGURE 14. Average tourist expenditure in the winery (visit price is not included)



Source: Own elaboration

3.3) Proposed monitoring indicators

As has been said, the Mallorca Wine Experience project has three approaches in order to reach the long-term goal of making a seasonally adjusted complement to the Sun & Sand tourism: Business, Cultural, and Economic/Regional. Each approach is composed by different outputs and activities and has its own monitoring indicators.

Before starting to develop outputs and activities, it is important to establish the measurements of short, medium, and long term: the short term is less than one year, the medium term is between one and five years and the long term is more than five years; each output and activity is represented in a table to measure its timeframe.

In both project planning matrix, one from each outcome, an estimated budget for each activity is calculated. There are three types of estimated budgets: the budget that will take place only one time in order to enable the activity *(-)*, the budget that will occur each year and that will be paid by the Regulation Council D.O. Binissalem or the Regulation Council M.W.E, depending of the outcome *(* Annual total*), and the budget that will take place each year and that will be paid by each winery *(** Annual total (each winery)).*

3.3.1) Business indicators

In order to reach the business approach of improving the current tourist situation of the wine cluster of Binissalem, 14 outputs with their own activities will be proposed (***Table 1***). In this approach, all monitoring indicators will be applied twice, before starting the project in order to know the current necessities of the wine cluster and after the established period of development of each activity to know if the needs have been satisfied.

Although the table below shows clearly all the information, some outputs have been explained in order to understand deeply all the actions to reach the business approach. Related to the output of *"increase the use of new technologies for the innovation in tourism",* the new technologies can be a good way to facilitate the tourists to get information about the wine cluster; other D.O., such as the D.O. Costers del Segre, are working on an App. Regarding the cooperation with other wine associations, it can give more power to the wine cluster of Binissalem and also can spread out its enotourism possibilities.

In order to improve the webpage of the Association of wine producers of Binissalem, it is important to create a specific section for wine informative articles; there are other D.O.s that currently have a section about wine informative articles and others, such as D.O. Pla I Llevant, that are working on it. In regard to the cellar door sales, they can help to reduce distribution costs of the winery and to create a close contact with the customer. Finally, in order to increase the sales of rosé wine, the informative seminars about rosé wine and its features will be conducted; due to the attendance to a tasting course, it is known that rosé wine is the unknown wine in the market and, therefore, it is important to inform about it in order to increase the knowledge about it by possible customers and, thus, its sales.

TABLE 1. Project planning matrix of Outcome 1: Improve the current tourist situation of the wine cluster of Binissalem (Business approach)

Outputs	*Activities*	*Inputs*	*Budget (in euros)*	*Objectively verifiable indicators*	*Means of verification*
A) *To increase the wine cluster visibility on internet*	*Create web pages for wineries that do not have one* ***(A.1)***	*Internet professional in communication*	*1 000*	*Number of wineries with an informative webpage*	*Tourism data about wines: Ruta del Vino (D.O. Binissalem, 2016b) and the Association of wine producers of Binissalem webpage*
	Create a social network for wineries that do not have one ***(A.2)***	*Internet professional in communication*	*1 000*	*Number of wineries with a social network*	
	Create an informative section about D.O. Binissalem at the City Hall webpages that do not have one ***(A.3)***	*Internet professional in communication*	*1 000*	*Number of City Hall webpages with D.O. information*	
TOTAL			***3 000***		

B) *To increase the use of new technologies for the innovation in tourism*	*Develop an App for the wine routes and D.O. Binissalem* ***(B.1)***	*App designer*	*1 500*	*Ask to the Regulation Council*	*Regulation Council questionnaire*
TOTAL			***1 500***		
C) *To educate about wine tourism and wine culture*	*Create a wine magazine* ***(C.1)***	*Wine professionals & Journalists*	*5 000*	*Ask to the Regulation Council*	*Regulation Council questionnaire*
	Provide enotourism management courses ***(C.2)***	*Enotourism professionals*	*6 000**	*Average formation of employees*	*Winery questionnaires*
	Offer an annual course about wine for the staff winery by SOIB ***(C.3)***	*Wine professionals*	*2 000**	*Average formation of employees*	
	Organize wine tours to the D.O. Binissalem from the Summer University UIB ***(C.4)***	*Tour guides*	*1 500**	*Average wine knowledge by the tourist*	
	Offer a Massive Open Online Course (MOOC) about enotourism and the D.O. Binissalem ***(C.5)***	*Internet professional in communication & Wine professionals*	*1 000*	*Number of students in the MOOC*	
	Offer regular tasting workshops throughout the year ***(C.6)***	*Wine professionals*	*300***	*Number of wineries that offer tasting scheduled workshops during the year*	

	Organize wine workshops for youth and school groups ***(C.7)***	*Tour guides*	*300***	*Number of wineries that offer wine workshops for youth and school groups*	
TOTAL			***6 000***		
ANNUAL TOTAL*			***9 500****		
ANNUAL TOTAL (each winery)**			***600*****		
D) *To cooperate with other wine associations*	*D.O. Binissalem should cooperate with the Spanish association of wine cities (ACEVIN)* ***(D.1)***	*D.O. Binissalem & ACEVIN*	*8 000*	*Ask to the Regulation Council*	*Regulation Council questionnaire*
TOTAL			***8 000***		
E) *To improve the webpage of the Association of wine producers of Binissalem*	*Create an enotourism section where tourists can buy wine tourism packs* ***(E.1)***	*Internet professional in communication*	*1 000*	*Section types in the D.O. Binissalem webpage*	*Webpage of the Association of wine producers of Binissalem*
	Create a section for wine informative articles ***(E.2)***	*Internet professional in communication & Wine professionals*	*1 000*		
	Create a meteorology section to inform about weather ***(E.3)***	*Internet professional in communication & Meteorologist*	*1 000*		
TOTAL			***3 000***		

F) *To make the cooperation between public and private sectors more fluid*	*An administrative technician to attract private funding* ***(F.1)***	*Administrative technician*	*12 000**	*Number of private companies involved in the wine cluster*	*Regulation Council questionnaire*
ANNUAL TOTAL*			***12 000****		
G) *To increase the cellar door sales*	*Create a direct sales logo at the cellar doors* ***(G.1)***	*Designer*	*1 000*	*Percentage of total annual production sold directly to the winery visits*	*Winery questionnaires*
	Apply lower wine prices at the winery, related to supermarkets ***(G.2)***	*Economist & Wine professionals*	*3 000*		
TOTAL			***4 000***		
H) *To identify wineries with quality distinctions*	*Make an analysis to extend the craft business and wine master craftsman qualifications to the wineries that deserve it* ***(H.1)***	*Analyst*	*2 000*	*Number of quality distinctions about traditional wine production by wineries*	*Winery questionnaires*
TOTAL			***2 000***		
I) *To increase the number and quality of winery visits*	*Hire a person to exclusively guide visits* ***(I.1)***	*Tour guide*	*6 000***	*Number of wineries that have a person who exclusively guides visits*	
	Homogenize the visit duration between wineries ***(I.2)***	*Analyst*	*1 000*	*Visit duration (minutes)*	

	*Establish specific visiting hours **(I.3)***	*Analyst*	*1 000*	*Number of wineries that offer timetabled visits*	*Winery questionnaires*
	*Increase the German language offer in visits **(I.4)***	*Tour guide (German speaker)*	*6 000***	*Number of languages in which to offer visits* *Residence country of the tourists*	
	*Offer visits for all group sizes: singles, couples, families and groups **(I.5)***	*Tour guide for big group sizes*	*6 000***	*Number of wineries that offer visits by group size*	
	*Offer free basic visits and paid visits with dinner, concerts, tasting courses, etc… **(I.6)***	*Tour designer*	*2 500*	*Visit cost (euros)*	
	*Visit the tasting area in all the visits **(I.7)***	*Tour guide*	*6 000***	*Number of visited places in the winery*	
TOTAL			***4 500***		
ANNUAL TOTAL (each winery)**			***24 000*****		
***J)** To increase the number of services offered by the wineries*	*Offer catering services **(J.1)***	*Restaurants*	*30 000*	*Number of services offered by each winery*	*Winery questionnaires*
	*Offer own host visitor services **(J.2)***	*Host infrastructures*	*40 000*		
	*Put signaling to find the winery **(J.3)***	*Signals*	*10 000*		

	*Adapt wineries for disabled guests **(J.4)***	*Disabled guest infrastructures*	*30 000*		
TOTAL			***11 000***		
***K)** To do a marketing campaign*	*Carry out a marketing campaign to sell wines from the D.O. Binissalem in Europe and Spain **(K.1)***	*Communication & marketing professionals*	*30 000*	*Country target of the D.O. Binissalem wines in Mallorca* *Annual percentage of total production sold in Mallorca*	*Winery questionnaires*
TOTAL			***30 000***		
***L)** To carry out promotion actions for the D.O.*	*Create wine-related merchandise from each winery to sell at the wine shop **(L.1)***	*Merchandise designers*	*15 000*	*Number of the wineries that sell specific products about their wineries*	*Winery questionnaires*
TOTAL			***15 000***		
***M)** To increase the sales of rosé wine*	*Informative seminars about rosé wine and its features will be conducted **(M.1)***	*Wine professionals*	*1 000*	*Percentage of total production of each wine (red, white, rosé)*	*Winery questionnaires*
TOTAL			***1 000***		
***N)** To monitor enotourism*	*Use a registry of visits **(N.1)***	*Person to monitor enotourism*	*12 000***	*Number of wineries that use a registry of visits*	*Winery questionnaires*
ANNUAL TOTAL (each winery)**			***12 000*****		
GRAND TOTAL			***89 000***		

GRAND ANNUAL TOTAL*			***21 500****		
GRAND ANNUAL TOTAL (each winery)**			***36 600*****		

Source: Own elaboration

**** Annual total:** Budget by a year*

***** Annual total (each winery):** Budget by a year, by each winery*

Table 2 shows the timeframe of each output and activity from the business approach, according to three timeframe measures.

TABLE 2. Timeframe: Business indicators

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(1 – 5 years)</th><th>LONG
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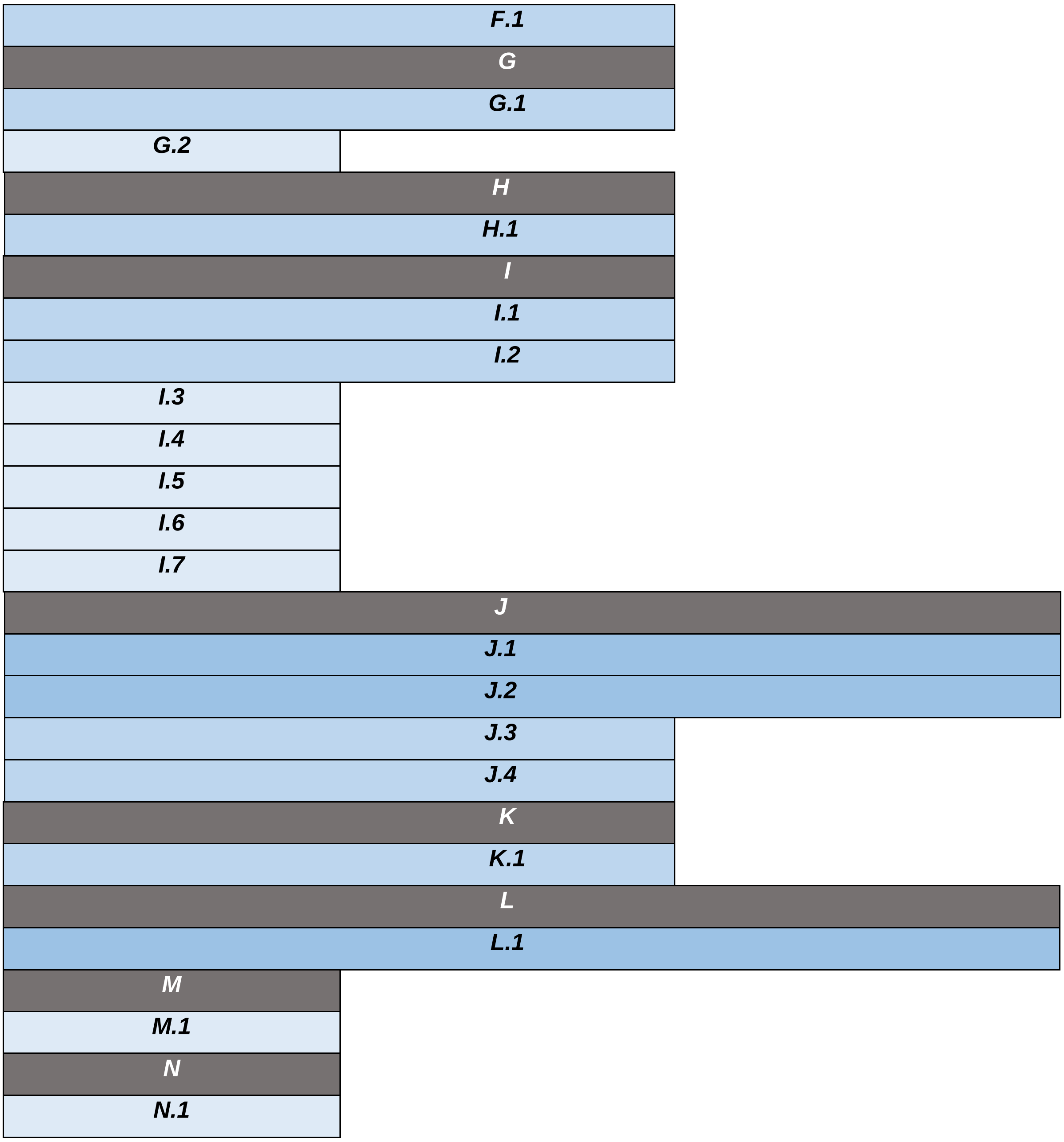

Source: Own elaboration

3.3.2) Cultural indicators

The cultural approach is to provide a permanent place where the Mallorcan wine culture will be divulged in a strategic location. For this approach, except for the indicator of the number of wineries that have a private area where events can be organized, all the indicators will be applied in a second step to check if the activities have been properly developed because *"Mallorca Wine Experience"* is a project that starts from zero, that is, it is centered around a building that does not exist at present.

In ***Table 3***, the logical framework from the cultural approach is explained. In addition, some outputs have been explained deeply in order to understand better all the actions to reach the cultural approach. Related to create customer loyalty, regarding the Mallorca Wine Experience (M.W.E) club, Getz & Brown (2006) affirm that *"clubs could become vehicles for building awareness of wine tourism opportunities and even for organizing group tours and marketing customized trips".* As regards MICE enotourism activities, this sector is the one that generates more money daily and which can help the seasonal tourism adjustment; furthermore, an air connectivity agreement is necessary because MICE are mainly common in winter when the air connectivity is not very good. In regard to the marketing campaign to inform about the project, the TV advertisement should be specially focus on the British market (see Section 4: ***4.1.4) Profile comparison: Tourist – Enotourist***) to inform about the enotourism project and wine features. Designing a wine shop at the second floor to sell regional products is key for the Balearic agricultural and artisanal sectors and therefore for the Balearic economy (economic/regional approach), especially because the competition comes from the Iberian Peninsula, where those products are not characteristic.

The Mallorca wine museum will be located on the third floor as a marketing strategy, because to go there it will be necessary to go through the other two floors (although a lift will have to be placed in the building for accessibility). Moreover, the chill-out wine bar at the rooftop is inspired on the bar called *"Bubbles Bertha"* from the winery *"Cavas Bertha",* from the D.O. Penedès which is the most visited D.O. in Spain. Besides, the building's exterior will be based on food trucks for low and medium income people and a luxury restaurant for high income people; the luxury restaurant will represent a formal version of the chill-out wine bar. Finally, the involvement of local residents in the project is key for the enotourism project success.

TABLE 3. Project planning matrix of Outcome 2: Provide a permanent place where the Mallorcan wine culture will be divulged in a strategic location (Cultural approach)

Outputs	***Activities***	***Inputs***	***Budget (in euros)***	***Objectively verifiable indicators***	***Means of verification***
A) *To make visibility on the internet about the building project*	*Hire a web designer to create a webpage for the project* ***(A.1)***	*Internet professional in communication*	*800*	*Number of web pages related to the Mallorcan wine culture in the created webpage*	*Mallorca Wine Experience webpage*
	Establish links to all the important webpages related to the Mallorcan wine culture in the created webpage ***(A.2)***	*Internet professional in communication*	*200*		
	Create a virtual section in the webpage to visit the building ***(A.3)***	*Internet professional in communication*	*1 000*	*Number of visits in the Mallorca Wine Experience webpage*	

TOTAL			***2 000***		
B) *To create customer loyalty*	*Create the Mallorca Wine Experience club, with a card, for exclusive events* ***(B.1)***	*Card designer & Organizer & Wine professionals*	*15 000**	*Number of persons by residence country in the M.W.E club*	*M.W.E registry*
	Create a card by points for future sales discounts ***(B.2)***	*Card designer & Analyst*	*12 000**	*Number of sales discounts by month*	
ANNUAL TOTAL*			***27 000****		
C) *To organize MICE (Meetings, Incentives, Conferences, and Exhibitions) enotourism activities*	*Enable private areas in the wineries that do not have one* ***(C.1)***	*Building material & Architect*	*80 000*	*Number of wineries with a private area to celebrate MICE*	*Winery questionnaires*
	Create a specific department into the Regulatory Council to manage it ***(C.2)***	*Employee in MICE*	*15 000**	*Number of persons working in the specific department of the Regulatory Council to organize MICE activities*	*M.W.E registry*
	Sign an air connectivity agreement with the main wine target countries that come to Mallorca ***(C.3)***	*Analyst & Air company*	*30 000*	*Number of countries in the air connectivity agreement*	
TOTAL			***110 000***		
ANNUAL TOTAL*			***15 000****		
D) *To do a marketing campaign to inform about the project*	*Create a TV advertisement for the target* ***(D.1)***	*Professional in communication and marketing*	*20 000*	*Number of TV advertisements with the M.W.E logo*	*M.W.E registry*
	Create a M.W.E logo ***(D.2)***	*Professional in marketing & Artist*	*8 000*		

	Put informative brochures at the airport **(D.3)**	Professional in marketing	5 000	Number of brochures at the airport by month	
TOTAL			**33 000**		
E) To analyse the best strategic location for the new building	Hire an enterprise to do the construction **(E.1)**	Construction company & Building material	4 000 000	Number of square meters of the Mallorca Wine Experience location	Architect's registry
	Hire a professional to identify the best place for the building in the centre of the wine cluster **(E.2)**	Professional in location	4 000		
	Hire an architect **(E.3)**	Architect	200 000		
TOTAL			**4 204 000**		
F) To design the first floor: selling tickets to visit wineries, vineyards, wine events, wine routes	Put informative brochures **(F.1)**	Professional in marketing	5 000	Number of printed brochures by month	M.W.E registry
	Hire six persons to sell the tickets **(F.2)**	Employees	57 000*	Number of persons selling tickets	
	Hire an interior designer **(F.3)**	Designer	6 000		
TOTAL			**11 000**		
ANNUAL TOTAL*			**57 000***		
G) To design the second floor: show cooking, wine shop & wine dispensers (rechargeable card)	Invite every weekend a Mallorcan chef for the show cooking with local gastronomy **(G.1)**	Mallorcan chef	10 000*	Number of show cooking	
	Organize gastronomy workshops every Wednesday **(G.2)**	Gastronomy professionals	10 000*	Number of gastronomy workshops	

	Design a wine shop that will contain wines from both Mallorcan D.O.s and regional products **(G.3)**	Wines & Regional products	8 000	Number of wine varieties in the wine shop Number of regional products in the wine shop	M.W.E registry
	Hire an interior designer **(G.4)**	Designer	6 000	Number of free requested rechargeable cards by month	
	Create a rechargeable card for the wine dispensers **(G.5)**	Card designer & Wine professionals	6 000		
TOTAL			**20 000**		
ANNUAL TOTAL*			**20 000***		
H) To design the third floor: Mallorca wine museum (free entrance)	Contact with winemakers from both Mallorcan D.O.s in order to reach an agreement about the material that the museum will contain **(H.1)**	Wine-related material	6 000	Number of wine-related objects in the museum	M.W.E registry
	Hire an interior designer **(H.2)**	Designer	6 000		
TOTAL			**12 000**		
I) To design the rooftop: Chill-out wine bar	Organize luxury events at weekends **(I.1)**	Organizers	100 000*	Number of luxury events	M.W.E registry
	Design a suitable menu around wines **(I.2)**	Gastronomy professionals	6 000	Number of dishes in the menu	
	Hire an interior designer **(I.3)**	Designer	6 000		

TOTAL			***12 000***		
ANNUAL TOTAL*			***100 000****		
J) *To design the exterior of the building: Food trucks & Luxury restaurant*	*Allocate four permanent food trucks* ***(J.1)***	*Food trucks*	*4 000*	*Number of food trucks*	*M.W.E registry*
	Design a luxury menu with the most expensive wines ***(J.2)***	*Gastronomy professionals*	*6 000*	*Number of dishes and wines in the menu*	
	Hire an interior designer ***(J.3)***	*Designer*	*6 000*		
TOTAL			***16 000***		
K) *To involve the local residents in the project*	*Establish lower prices at the M.W.E center compared to the supermarkets* ***(K.1)***	*Economist & Analyst*	*8 000*	*Prices in the building and in supermarkets*	*M.W.E registry*
	Establish a period of two weeks to allows local residents to visit the center free of charge, before opening it to tourists ***(K.2)***	*Tour guides*	*50 000*	*Number of local residents visiting in the period of two weeks*	
TOTAL			***58 000***		
GRAND TOTAL			***4 478 000***		
GRAND ANNUAL TOTAL*			***219 000****		

Source: Own elaboration

**** Annual total:** Budget by a year*

***** Annual total (each winery):** Budget by a year, by each winery*

Table 4 shows the timeframe of each output and activity from the cultural approach, according to three timeframe measures.

TABLE 4. Timeframe: Cultural indicators

<table>
<tr><th>SHORT
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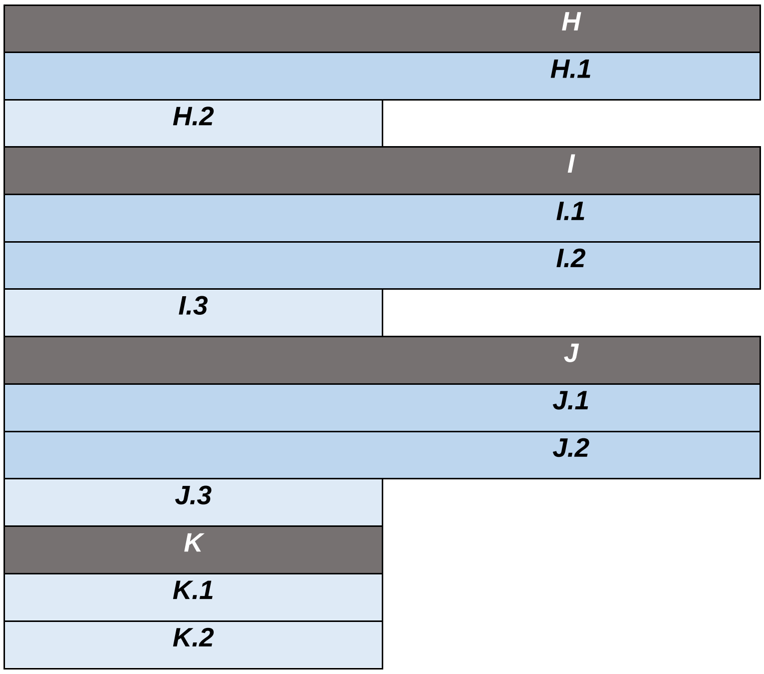


Source: Own elaboration

3.3.3) Economic/regional indicators

The economic approach of enhancing the Balearic economy through production and employment will be a result of hiring local residents to improve the current situation of the wine cluster and to carry out the Mallorca Wine Experience project; thus, the economic approach will be a positive consequence of achieving the other both approaches.

The indicators to measure this economic impact will be the unemployment ratio, employment ratio, employment ratio in the wine cluster and their verification mean will be the official records. The economic approach is justified because *“compared with other crops, the wine sector requires much labour. On average in the Union, the number of Annual Work Units per hectare of vineyard is more than twice higher than in the group of farms”* (European Commission, 2006).

3.3.4) Long-term goal indicators

Ten years after the project implementation, the long-term goal will be checked using the following indicators for both Sun & Sand tourism and Wine tourism: average tourist expenditure, and number of tourists by year and by month; the mean of verification of these indicators will be the secondary quantitative data from official records. A risk of this enotourism project is if wine tourism makes the wine region a more congested place in which to live.

In order to create a sustainable and effective enotourism plan in the long-term, it is necessary to create a new Regulatory Council for the Mallorca Wine Experience that will cooperate with the Regulatory Council from the D.O. Binissalem.

4. BASELINE STUDY

Baseline study is structured into two key parts: the baseline situation where the current situation about wine market and tourism is described, and the methodology used to build the proposed indicators where a description about how to design and build the indicators is exposed.

4.1) Baseline situation

The baseline situation subsection is divided into four issues: wine, tourism, wine cluster of Binissalem, and profile comparison between tourist and enotourist. The wine cluster of Binissalem situation is analysed according to a SWOT and stakeholder analyses. In addition, the profile comparison is focused on three items: average age, frequent gender, and residence country.

4.1.1) Wine

The European Union is the undisputed world leading producer of wine. *"Between 2009 and 2014, the average annual production was 167 million hectolitres. It accounts for 45% of world wine-growing areas, 65% of production, 57% of global consumption and 70% of exports in global terms"* (European Commission, 2016).

In Spain the vineyard area hectares devoted to winemaking are 1 028 258 from 3 619 440 hectares of Useful Agricultural Area (UAA), according to the vineyard survey from 2009. *"Vineyard surveys"* is a methodology that uses a baseline survey on the vines, covering all holdings with vineyards; it is carried out every ten years (Spanish government, 2016).

This data shows the importance of the wine sector in our country; this importance can also be explained by the number of exploitations devoted to winemaking, 381 089. The winemaking exploitation can be divided in Quality Wines Produced in Specified Regions (QWPSR) and Other wines; as shown in ***Table 5***, QWPSR have a big portion of the wine sector. This fact reveals the quality standard of the Spanish wines. Furthermore, comparing winemaking with the other exploitation types, it can be concluded that the most part of the grapes is devoted to winemaking.

TABLE 5. Number of farms UAA and vines by type of farm: SPAIN 2009

Type of exploitation	Nº exploitations	UAA hectares	Vineyard area hect.
Winemaking	381 089	3 619 440	1 028 258
QWPSR	242 799	2 492 333	621 540
Other wines	169 498	1 885 747	406 718
Table grape	13 005	53 425	17 362
Nursery seedlings	28	1 537	241
Rootstocks	32	8 468	738
Raisin	1 876	3 880	1 505
TOTAL	391 537	3 684 564	1 048 104

Source: Own elaboration from the agricultural statistics of Spanish government

The analysis above can also be done for the Balearic Islands. In this case, vineyard area hectares devoted to winemaking are 1 544 from 8 689 hectares of Useful Agricultural Area (UAA) while the number of exploitations are 1 013. As Spain, in Balearic Islands the QWPSR have also a big portion of the wine sector (see ***Table 6***).

The big difference between Spain and Balearic Islands is that in the latter there are only exploitations of winemaking and table grape.

TABLE 6. Number of farms UAA and vines by type of farm: BALEARIC ISLANDS 2009

Type of exploitation	Nº exploitations	UAA hectares	Vineyard area hect.
Winemaking	1 013	8 689	1 544
QWPSR	655	7 662	1 116
Other wines	368	3 529	428
Table grape	78	217	40
Nursery seedlings	0	0	0
Rootstocks	0	0	0
Raisin	0	0	0
TOTAL	1 026	8 850	1 584

Source: Own elaboration from the agricultural statistics of Spanish government

From the International Organisation of Vine and Wine (OIV), Spanish data about exports, imports, production, consumption, and individual consumption of wine are obtained. The OIV is an intergovernmental organization of a scientific and technical nature of recognized competence for its works concerning vines, wine, wine-based beverages, table grapes, raisins and other vine-based products (OIV, 2016).

In recent years, the wine sector has suffered a recession, highlighted by the increase of the import/export ratio (see ***Table 7***). In addition, the production, total consumption, and per capita consumption have decreased since 2007. Based on this data, it is important to promote the wine sector through different projects and policies as the ones explained in this Technical Report.

TABLE 7. Wine in Spain: Exports, Imports, Production, Total consumption, and Per capita consumption

SPAIN	2007	2008	2009	2010	2011	2012
Exports (in 1000 hl)	15 079	16 914	14 607	17 156	22 031	21 411
Imports (in 1000 hl)	462	607	350	405	422	1 236
Production (in 1000 hl)	36 408	35 913	36 093	35 353	33 397	31 123
Total consumption (in 1000 hl)	13 100	12 168	11 271	10 896	9 950	9 850
Per capita Consumption (kg per pers.)	34	32	29	28	25	25

Source: Own elaboration from OIV

4.1.2) Tourism

From the Statistical Institute of the Balearic Islands (IBESTAT, 2016), it is possible to obtain data from FRONTUR (volume of tourists with Balearic Islands as main destination) and EGATUR (socio-economic profile, and expenditures made by these tourists). These data are important to understand the tourist profile in the Balearic Islands and Mallorca.

From the accumulated first five months in 2016, it can be observed that the large number of tourists in the Balearic Islands and in Mallorca are foreign (see ***Table 8***). Also in both regions, the majority of foreign tourists are from Germany followed by the United Kingdom.
The annual rate of change (in percentage) related to the same month from the previous year is positive and high for all countries, less in the case of the other autonomous communities of Spain, where for the Balearic Islands is only 0.01 and for Mallorca is -0.69.

TABLE 8. Tourist flow and annual rate of change in Balearic Islands and Mallorca by residence country

	BALEARIC ISLANDS		MALLORCA	
2016 M01 – M05	Tourists	Annual rate of change	Tourists	Annual rate of change
SPAIN (other CCAA)	701 174	0.01	427 310	-0.69
FOREIGN	3 057 713	14.66	2 504 469	13.54
France	149 422	13.30	100 892	8,22
Italy	99 073	24.57	27 792	12.42
United Kingdom	755 802	12.57	538 898	14.35
Germany	1 285 212	6.09	1 190 256	4.88
Belgium, Luxembourg and the Netherlands	67 813	21.44	57 240	30.83
Nordic countries	155 805	9.50	151 656	8.73
Rest of the World	544 586	45.46	437 735	46.73

Source: Own elaboration from FRONTUR (IBESTAT)

As the tourist flow, the longer average tourist stays in the Balearic Islands and in Mallorca are done by foreign tourists (see ***Table 9***). Also in both regions, the majority of the foreign average tourist stays is done by Germany. Therefore, the tourists from Germany are the majority and they are those with a longer average tourist stay in both regions.

TABLE 9. Average tourist stay in Balearic Islands and Mallorca by residence country

	BALEARIC ISLANDS	MALLORCA
	Average tourist stay	Average tourist stay
2015 M01 – M09		
SPAIN (other CCAA)	7.85	7.93
FOREIGN	8.11	8.14
United Kingdom	7.7	7.59
Germany	8.13	8.18
2014		
SPAIN (other CCAA)	7.76	7.8
FOREIGN	8.28	8.32
United Kingdom	7.87	7.9
Germany	8.27	8.33
2013		
SPAIN (other CCAA)	7.69	8.02
FOREIGN	8.39	8.38
United Kingdom	7.96	7.97
Germany	8.49	8.46

Source: Own elaboration from EGATUR (IBESTAT)

Regarding the age group (***Table 10***), generally the number of female tourists is slightly higher than males for all age groups in the Balearic Islands and Mallorca. For both women and men, tourists are mainly from the 25 – 44 years of age group both in the Balearic Islands and Mallorca.

The average tourist stay shows that the target age group is 65 or more years in all cases, which corresponds to retired tourists.

TABLE 10. Tourist flow and average tourist stay in Balearic Islands and Mallorca by gender and age group

	BALEARIC ISLANDS		MALLORCA	
	Tourists	Average tourist stay	Tourists	Average tourist stay
2015 M01 – M09				
WOMEN				
Less than 15 years	493 465	9.06	342 561	9.18
15 – 24 years	825 670	8.38	612 385	8.29
25 – 44 years	3 057 994	7.3	1 924 048	7.59
45 – 64 years	1 749 613	8.34	1 339 666	8.19
65 or more years	525 718	10.09	367 709	9.57
MEN				
Less than 15 years	445 969	9.06	335 823	9.13
15 – 24 years	550 386	8.18	402 949	8.08
25 – 44 years	2 709 443	7.62	1 806 219	7.55
45 – 64 years	1 694 465	8.07	1 307 769	8.2
65 or more years	489 245	9.61	367 822	9.4
2014				
WOMEN				
Less than 15 years	492 825	9.3	365 230	9.33
15 – 24 years	975 399	8.69	686 625	8.78
25 – 44 years	3 192 757	7.48	2 092 447	7.63
45 – 64 years	1 958 611	8.44	1 554 350	8.29
65 or more years	506 389	11.17	382 642	11.13
MEN				
Less than 15 years	475 095	9.22	364 907	9.29
15 – 24 years	610 099	8.05	423 117	8.04
25 – 44 years	2 899 068	7.51	1 882 716	7.53
45 – 64 years	1 917 516	8.08	1 509 982	8.1
65 or more years	496 743	10.45	388 447	10.28

Source: Own elaboration from EGATUR (IBESTAT)

The income level is another issue that influences the tourist flow and the average tourist stay. As it is expected, the large number of tourists in both regions comes from the medium income level (***Table 11***). Even so, medium income level tourists have the lowest average length of tourist stay.

TABLE 11. Tourist flow and average tourist stay in Balearic Islands and Mallorca by income level

	BALEARIC ISLANDS		MALLORCA	
	Tourists	Average tourist stay	Tourists	Average tourist stay
2015 M01 – M09				
High	5 338 229	8.17	3 605 421	8.48
Medium	6 946 546	8	4 989 768	7.85
Low	257 193	7.82	211 761	7.97
2014				
High	6 038 130	8.22	4 186 671	8.52
Medium	7 132 285	8.14	5 198 444	7.99
Low	354 087	9.08	265 346	9.45
2013				
High	4 969 959	8.57	3 698 521	8.65
Medium	7 622 185	8.12	5 454 241	8.14
Low	457 663	8	325 381	8.3

Source: Own elaboration from EGATUR (IBESTAT)

Tourist expenses are a key factor to contribute to the economic development of a tourist destination. Total expenses are clearly higher for foreign and also by German tourists both in the Balearic Islands and Mallorca (see ***Table 12***). For the case of average daily expenditure and average expenditure per person, both are higher for foreign but the average daily expenditure is always higher for the United Kingdom and the average expenditure per person depends on the year.

TABLE 12. Tourist expenses in the Balearic Islands and Mallorca by residence country

	BALEARIC ISLANDS			MALLORCA		
	Total expenses	Average daily expenditure	Average expenditure per person	Total expenses	Average daily expenditure	Average expenditure per person
2015 M01 – M09						
SPAIN (other CCAA)	1 492 768	89.45	702.54	756 348	90.04	713.8
FOREIGN	9 927 977	117.53	953.04	7 368 100	116.85	951.05
United Kingdom	2 811 510	114.97	885.74	1 779 659	118.15	896.41
Germany	3 127 857	107.76	876.21	2 835 887	107.1	875.88
2014						
SPAIN (other CCAA)	1 604 857	95.05	737.44	782 035	93.12	726.38
FOREIGN	10 355 189	110.16	912.49	7 801 710	109.39	909.94
United Kingdom	2 799 813	105.04	827.15	1 813 462	105.93	837.37
Germany	3 588 888	104.77	866.37	3 244 311	104.32	869.49
2013						
SPAIN (other CCAA)	1 381 795	90.14	693.56	657 647	83.15	666.47
FOREIGN	10 635 826	114.6	961.87	8 016 748	112.61	944.1
United Kingdom	2 913 356	109.54	871.97	1 807 299	107.66	858.17
Germany	3 733 382	107.56	913.46	3 361 170	107.14	905.95

Source: Own elaboration from EGATUR (IBESTAT)

The expenses by gender show that women have a higher total expense in the Balearic Islands for the period below while in Mallorca the total expenses by gender depend on the year (***Table 13***). In addition, total expenses are higher for the 25 – 44 age group in all the cases.

The average daily expenditure is higher for males than females in all the cases, and by age group it is higher for the cases of 25 – 44 and 45 – 64 years. In addition, the average expenditure per person is slightly higher for the men, and by age group it is higher for the cases of 45 – 64 and 65 or more years.

TABLE 13. Tourist expenses in the Balearic Islands and Mallorca by gender and age group

	BALEARIC ISLANDS			MALLORCA		
	Total expenses	Average daily expenditure	Average expenditure per person	Total expenses	Average daily expenditure	Average expenditure per person
2015 M01 – M09						
WOMEN						
Less than 15 years	419 320	93.74	849.75	297 903	94.75	869.64
15 – 24 years	718 009	103.83	869.61	538 798	106.16	879.84
25 – 44 years	2 662 835	119.28	870.78	1 695 025	116.01	880.97
45 – 64 years	1 676 484	114.92	958.2	1 305 222	119	974.29
65 or more years	478 893	90.25	910.93	355 873	101.14	967.81
MEN						
Less than 15 years	388 601	96.17	871.36	297 390	96.99	885.56
15 – 24 years	498 087	110.61	904.98	350 383	107.62	869.55
25 – 44 years	2 460 427	119.22	908.09	1 611 577	118.24	892.24
45 – 64 years	1 648 349	120.59	972.78	1 301 474	121.33	995.19
65 or more years	469 739	99.95	960.13	370 803	107.26	1 008.11
2014						
WOMEN						
Less than 15 years	415 910	90.74	843.93	317 239	93.05	868.6
15 – 24 years	835 287	98.59	856.35	596 468	98.98	868.7
25 – 44 years	2 718 293	113.87	851.39	1 776 159	111.3	848.84
45 – 64 years	1 781 555	107.72	909.6	1 427 785	110.81	918.57
65 or more years	457 481	80.88	903.42	357 200	83.85	933.51

MEN						
Less than 15 years	***404 956***	***92.41***	***852.37***	***321 029***	***94.71***	***879.76***
15 – 24 years	***562 979***	***114.59***	***922.77***	***372 178***	***109.34***	***879.61***
25 – 44 years	***2 534 140***	***116.33***	***874.12***	***1 621 612***	***114.45***	***861.32***
45 – 64 years	***1 797 344***	***116***	***937.33***	***1 428 701***	***116.85***	***946.17***
65 or more years	***452 103***	***87.06***	***910.13***	***365 372***	***91.5***	***940.6***

Source: Own elaboration from EGATUR (IBESTAT)

Total tourist expenses are higher for the medium income level in all the cases while both average daily expenditure and average expenditure per person are higher for the high income level for all the cases (***Table 14***).

TABLE 14. Tourist expenses in the Balearic Islands and Mallorca by income level

	BALEARIC ISLANDS			***MALLORCA***		
	Total expenses	***Average daily expenditure***	***Average expenditure per person***	***Total expenses***	***Average daily expenditure***	***Average expenditure per person***
2015 M01 – M09						
High	***5 287 495***	***121.26***	***990.5***	***3 666 487***	***119.87***	***1 016.94***
Medium	***5 948 614***	***107.1***	***856.34***	***4 306 685***	***109.93***	***863.1***
Low	***184 636***	***91.76***	***717.89***	***151 276***	***89.61***	***714.37***
2014						
High	***5 786 135***	***116.58***	***958.27***	***4 083 863***	***114.51***	***975.44***
Medium	***5 890 998***	***101.5***	***825.96***	***4 290 331***	***103.26***	***825.31***
Low	***282 913***	***87.97***	***798.99***	***209 551***	***83.6***	***789.72***
2013						
High	***5 109 858***	***120***	***1 028.15***	***3 776 723***	***118.05***	***1 021.14***
Medium	***6 557 867***	***105.95***	***860.37***	***4 650 368***	***104.73***	***852.62***
Low	***349 896***	***95.57***	***764.53***	***247 304***	***91.57***	***760.04***

Source: Own elaboration from EGATUR (IBESTAT)

4.1.3) Wine cluster of Binissalem

As said, the wine cluster of Binissalem is divided into two analyses, one for the wine cluster situation through a SWOT analysis, and the other for the stakeholders involved in the wine cluster and their importance and influence on it.

A) SWOT analysis

Through a SWOT analysis (Dyson, 2004), the current situation of the wine cluster of Binissalem can be explained in a schematic form as follows:

Strengths:

- *Wine events during the year*
- *Attractive environment: Natural and cultural resources*
- *Quality wines driven by the D.O. certification*
- *Regional gastronomy*
- *Family owned wineries*
- *Wine Days project*
- *Involvement in the wine cluster by private sector*

Weaknesses:

- *Own visitor services: host and catering*
- *Wine cluster visibility on internet*
- *Disabled guest infrastructures*
- *Person to exclusively guide visits*
- *Registry of visits*
- *Timetable visits*
- *German language in visits*
- *Visits for all group sizes: singles, couples, families and groups*
- *Wine-related merchandise from each winery*

Opportunities:

- *Value-for-money (considering what you pay for a trip to the Binissalem wine tourism destination, you get much more than when visiting other D.O.s)*
- *New technologies for the innovation in tourism*
- *Cooperation with other wine associations*
- *Youth and school groups*
- *MICE enotourism activities*
- *D.O. Pla i Llevant*
- *UIB*
- *Weather*

Threats:

- *Sun & Sand tourism*
- *Bad air connectivity in winter*
- *Rosé wine ignorance*
- *Weather*
- *Insularity effect*

The SWOT analysis has been built from results of the Regulation Council and winery questionnaires and also through the participant observation technique.
Both strengths and weaknesses embrace the endogenous factors while opportunities and threats are represented by exogenous factors; in other words, strengths and weaknesses are the own factors of the wine cluster while opportunities and threats are the external factors of the Binissalem wine cluster.

The wine cluster of Binissalem has important strengths that shape Mallorca as a wine tourism destination. All the municipalities that belong to the D.O. Binissalem have an attractive environment, quality wines and regional gastronomy that conform the tourism destination. Some of the wineries from the D.O. Binissalem are family owned; these wineries offer a traditional winemaking approach for the tourists interested in it. Wine fairs and wine events such as *"Festa des Vermar"* promote the wine culture across the year. Furthermore, since 2014, the wine cluster of Binissalem has taken advantage from an enotourism project called *"Wine Days Mallorca – D.O. Binissalem".* This project has embraced conferences about wine tourism since 2015 and put into value the wine, the local gastronomy, and the culture of the whole region; in 2016, Wine Days has coincided with the 25th birthday of D.O. Binissalem. This enotourism project has been gaining strength every year (Mallorca confidencial, 2015 & Wine up Guide, 2015). In addition, the cooperation between public and private sectors is crucial to develop the wine cluster as an enotourism destination.

All the weaknesses above are represented in section 3 as an activity/output to develop the business approach of improving the current tourist situation of the wine cluster of Binissalem.

When tourists come to Mallorca to visit the Binissalem wine tourism destination they also come to a Mediterranean island with own gastronomy, good weather, beaches, etc… this can be considered an opportunity to make Wine tourism and Sun & Sand tourism as complementary. MICE enotourism activities can be an economically profitable way to understand the wine tourism as due to MICE tourism higher revenues can be generated daily. The cooperation between both Mallorcan D.O.s can give a broader vision of the Mallorcan wine culture while it helps to "sell" Mallorca abroad as a wine tourism destination; furthermore, the cooperation between the University of Balearic Islands (UIB) and the D.O. Binissalem can push the education about wine tourism and wine culture. In addition, youth and school groups can be included in winery visits in order to teach them about wine culture for a future enotourism development. Finally, the cooperation with other wine associations such as ACEVIN and the use of new technologies for the innovation in tourism are also opportunities for the wine cluster.

Sun & Sand tourism can be a threat because tourists may continue to come to Mallorca for this type of tourism and not for wine tourism. The bad air connectivity in winter might hinder the MICE enotourism activities that take place mostly in this period of the year. Furthermore, the rosé wine ignorance can push down the future sales. Another threat is the insularity effect that makes Mallorcan wines more expensive than the imported wines from the Iberian Peninsula. Weather can be a threat or an opportunity because *"wine quality and prices are extraordinarily sensitive to fluctuations in the weather of the year in which the grapes were grown"* (Storchmann, 2011).

The Mallorca Wine Experience project intends to highlight the strengths and opportunities and to overcome the weaknesses and threats.

B) Stakeholder analysis

In this context, the wine cluster of Binissalem has a group of stakeholders that interacts with it and its policies and tourism actions. In order to identify which are the key stakeholders and their importance and influence in the cluster, an analysis of each one has been made below:

D.O. Pla I Llevant: It is the other D.O. of Mallorca, founded in 1999. As D.O. Binissalem, it is composed of 13 wineries, but spreads across 18 municipalities. In 2016, jointly with D.O. Binissalem, it has adhered to the *"Wine in Moderation"* campaign that promotes responsible wine consumption (D.O. Pla I Llevant, 2016).

The 5 City Halls from the wine cluster (note that each City Hall embraces all its own municipality area): Binissalem, Consell, Santa Eugènia, Santa María del Camí, and Sencelles.

Regulation Council from the D.O. Binissalem and the one to be created for the Mallorca Wine Experience project.

The 13 D.O. Binissalem wineries (Association of wine producers of Binissalem)

Private sector: Business group of travel agencies of Balearic Islands (AVIBA), Mallorca Rutes, Mallorca Wine Tours, Tourism agency of Balearic Islands.

Business group of travel agencies of Balearic Islands (AVIBA): It gathers the main companies from the Balearic tourism sector, with the aim of jointly carrying out issues that help and protect this industry. Currently, the travel agencies integrated into AVIBA represent 90% of the tourism, both international and national, that comes to the Balearic Islands (AVIBA, 2016).

Mallorca Rutes: It offers routes around Mallorca about wines from both Mallorcan D.O.s. Routes are offered in four languages: Catalan, Spanish, English, German.

Mallorca Wine Tours: It offers different types of tour (by bicycle, van, with supper, with a concert, etc…) related to Mallorcan wines; tours are offered in Spanish, English, German. Mallorca Wine Shop is included in Mallorca Wine Tours and sells Mallorcan wine by *"Wine Boxes".*

Tourism agency of Balearic Islands.

Public sector: *Palma 365 foundation:* It is a non-profit public entity in tourism and foreign promotion, composed by Palma City Council, the Port Authority of Baleares and 28 private companies (Palma 365 foundation, 2016).

Table 15 summarizes the kind of interest in the enotourism project by each stakeholder and also which is the nature of this interest, that is, if the interest supports the project development or if it disrupts this development.

TABLE 15. Identification of key Stakeholders and their interests

STAKEHOLDER	Interest in the activity	Nature of interest: Supportive (+) Disruptive (-)
D.O. Pla I Llevant	*- Sell its own wine through a Mallorcan brand* *- Promote Mallorcan wine consumption*	+ +
The 5 City Halls from the wine cluster	*- Promote their municipality as a touristic region* *- Increase wealth in regions*	+ +
Regulation Councils (D.O. Binissalem & M.W.E)	*- Opportunity to influence policies* *- Opportunities to participate in planning* *- Opportunity to influence in the Mallorca's image as a wine tourist destination*	+ + +
The 13 D.O. Binissalem wineries	*- Increase their tourism activity* *- Promote Mallorcan wine consumption*	+ +
Business group of travel agencies of Balearic Islands (AVIBA)	*- Increase the flow of visitors to the destination* *- Opportunity to influence policies*	+/- -
Mallorca Rutes	*- Opportunity to participate in planning* *- Opportunity to influence in the Mallorca's image as a wine tourist destination*	+ +/-
Mallorca Wine Tours	*- Opportunity to participate in planning* *- Opportunity to influence in the Mallorca's image as a wine tourist destination*	+ +/-

Tourism agency of Balearic Islands	*- Opportunity to influence policies* *- Opportunities to participate in planning*	**-** **+**
Palma 365 foundation	*- Opportunity to influence policies* *- Opportunities to participate in planning*	**-** **+**

Source: Own elaboration

Table 16 summarizes the importance and influence that each stakeholder has on the enotourism plan development; being 1 the lowest value and 5 the highest.

TABLE 16. Importance and Influence of Stakeholders

STAKEHOLDER	Importance: Lowest (1) Highest (5)	Influence: Lowest (1) Highest (5)
D.O. Pla I Llevant	***3***	***3***
The 5 City Halls from the wine cluster	***4***	***3***
Regulation Councils (D.O. Binissalem & M.W.E)	***5***	***5***
The 13 D.O. Binissalem wineries	***5***	***5***
Business group of travel agencies of Balearic Islands (AVIBA)	***4***	***4***
Mallorca Rutes	***4***	***3***
Mallorca Wine Tours	***4***	***3***
Tourism agency of Balearic Islands	***4***	***4***
Palma 365 foundation	***4***	***4***

Source: Own elaboration

Both Regulation Councils and the 13 wineries from the wine cluster are those that have more power because they are in the core of the wine cluster, given that they are in all the meetings to discuss results from the outputs. Furthermore, they can influence policies, participate in planning, and are the most interested in the wine cluster development as a tourism cluster.

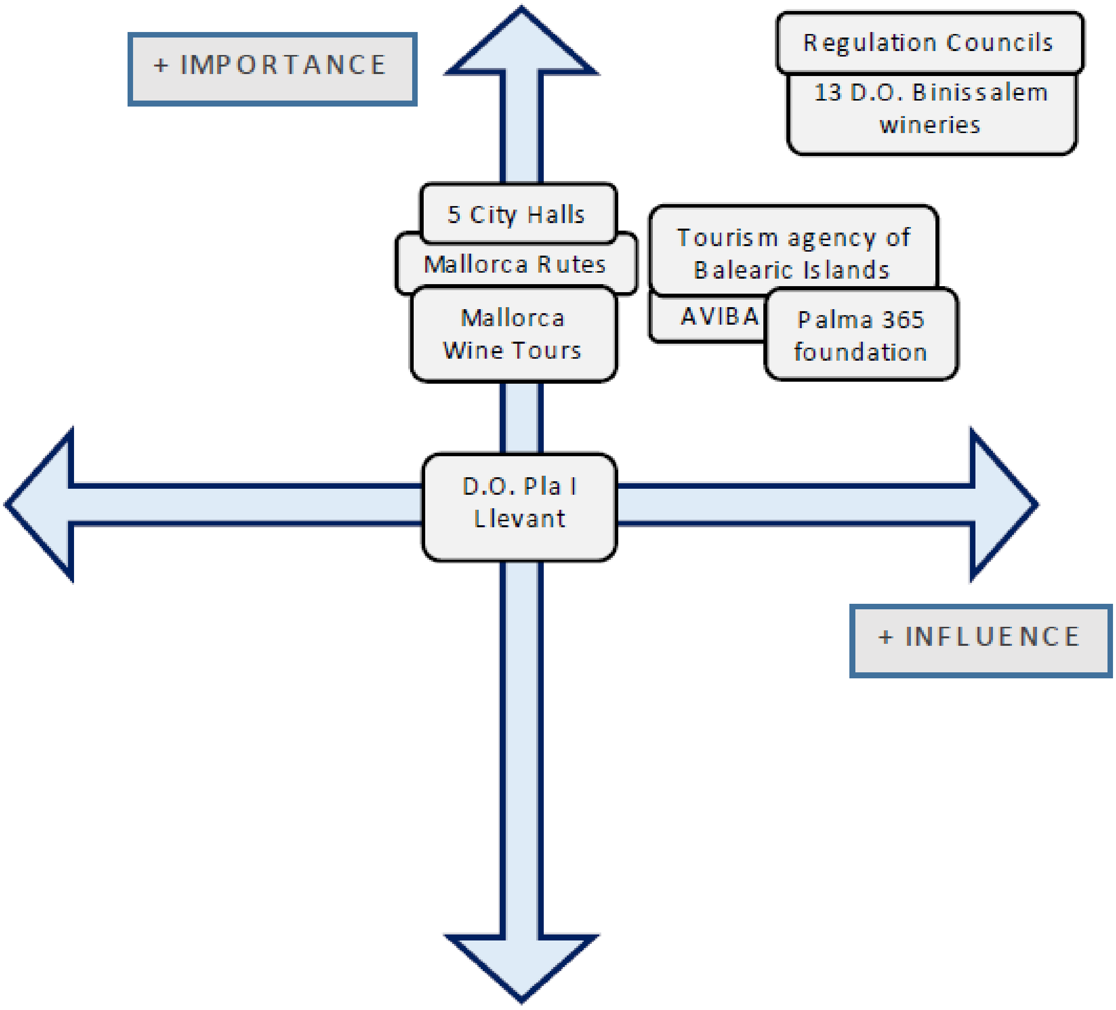
AVIBA, Tourism agency of Balearic Islands, and Palma 365 foundation can determine the tourism flow, influence policies, and participate in planning and for this reason they are also very powerful in the wine cluster; the fact that they can participate in planning is good because all the ideas are welcome but it may be that they influence policies only in their own benefit. In addition, the tourism flow may be harmful if the wine cluster becomes a crowded destination, although this is not a real problem right now. In order to ensure that these stakeholders do not influence policies in their own benefit, the Regulation Council from M.W.E will supervise all the decisions they make.

The 5 City Halls/municipalities from the wine cluster, Mallorca Rutes, and Mallorca Wine Tours are important for the services offered to the tourists and for the wealth of the regions from the D.O. Binissalem. For this reason, they can participate in planning and influence in Mallorca's image as a wine tourist destination. In order to ensure that these stakeholders do not influence negatively the Mallorca's image as a wine tourist destination, the Regulation Council from D.O. Binissalem will supervise all the decisions they make.

D.O. Pla I Llevant has a moderate power in the wine cluster and in the enotourism project because it needs the cooperation with the D.O. Binissalem to a greater extent than D.O. Binissalem needs it in reverse.

Figure 15 summarizes the power of each stakeholder according to its importance and influence on the project. This figure transforms the previous table in a more visual and useful format.

FIGURE 15. Stakeholders importance and influence matrix



Source: Own elaboration

Based on the ***"Stakeholders importance and influence matrix"***, it can be affirmed that the wine cluster of Binissalem has three key stakeholders: both Regulation Councils (from D.O. Binissalem and M.W.E), and the 13 D.O. Binissalem wineries. These key stakeholders are closely followed by the Business group of travel agencies of the Balearic Islands (AVIBA), the Tourism agency of the Balearic Islands, and the Palma 365 foundation, which also have importance and influence in the wine cluster but a little less compared with the key stakeholders.

In addition to these key stakeholders, D.O. Binissalem also has some such as *"Mallorca Rutes", "Mallorca Wine Tours",* and the 5 City Halls/municipalities that have the same importance than, for example, AVIBA but less influence in the cluster. D.O. Pla I Llevant is in the middle of the matrix because it has a moderate importance and influence.

Collaboration is needed to facilitate the wine tourism experience, involving the key stakeholders, such as destination management organizations, the wine and tourism industries, cultural and others (Getz & Brown, 2006).

4.1.4) Profile comparison: Tourist – Enotourist

In this section, the enotourist profile from winery questionnaires will be analyzed and compared with the general tourist profile in Mallorca from section 4 *(**4.1.2) Tourism**).* The average tourist expenditure is not analyzed below because the situation to spend money is not comparable, due to the enotourist expenditure is only situated in the context of winery visit (without the visit price) while the tourist expenditure is situated in a broader context.

A) Average age

The main enotourist profile by age is the one ranged from 41 to 55 years old while the main tourist profile ranges from 25 to 44 years old.

B) Frequent gender

In wine tourism, men are more frequent than women, with a difference of 20% between genders. On the contrary, in tourism profile women are the majority.

C) Residence country

The residence country of enotourists in the wine cluster, and also of tourists in Mallorca, is leaded by the European countries of Germany and England. Even though both profiles are similar, related to the country target of the D.O. Binissalem wines, an important aspect is the low importance of the British market for wine.

Therefore, it is important to focus on this country target in the winery visits, guiding them to the tasting area where the wine features will be explained.

4.2) Methodology used to build the proposed indicators

There are two indicator types, according to how they have been built. The indicators from the business approach and the indicators about MICE from the cultural approach (section 3) have been designed *"a priori"* of the activities; that is, Regulation Council and winery questionnaires have been developed at the same time of indicators in order to know the baseline situation of the wine cluster and then, after the timeframe of each activity, the same indicators will be applied again through the same questionnaire types to know if the activities have been successfully applied or not.

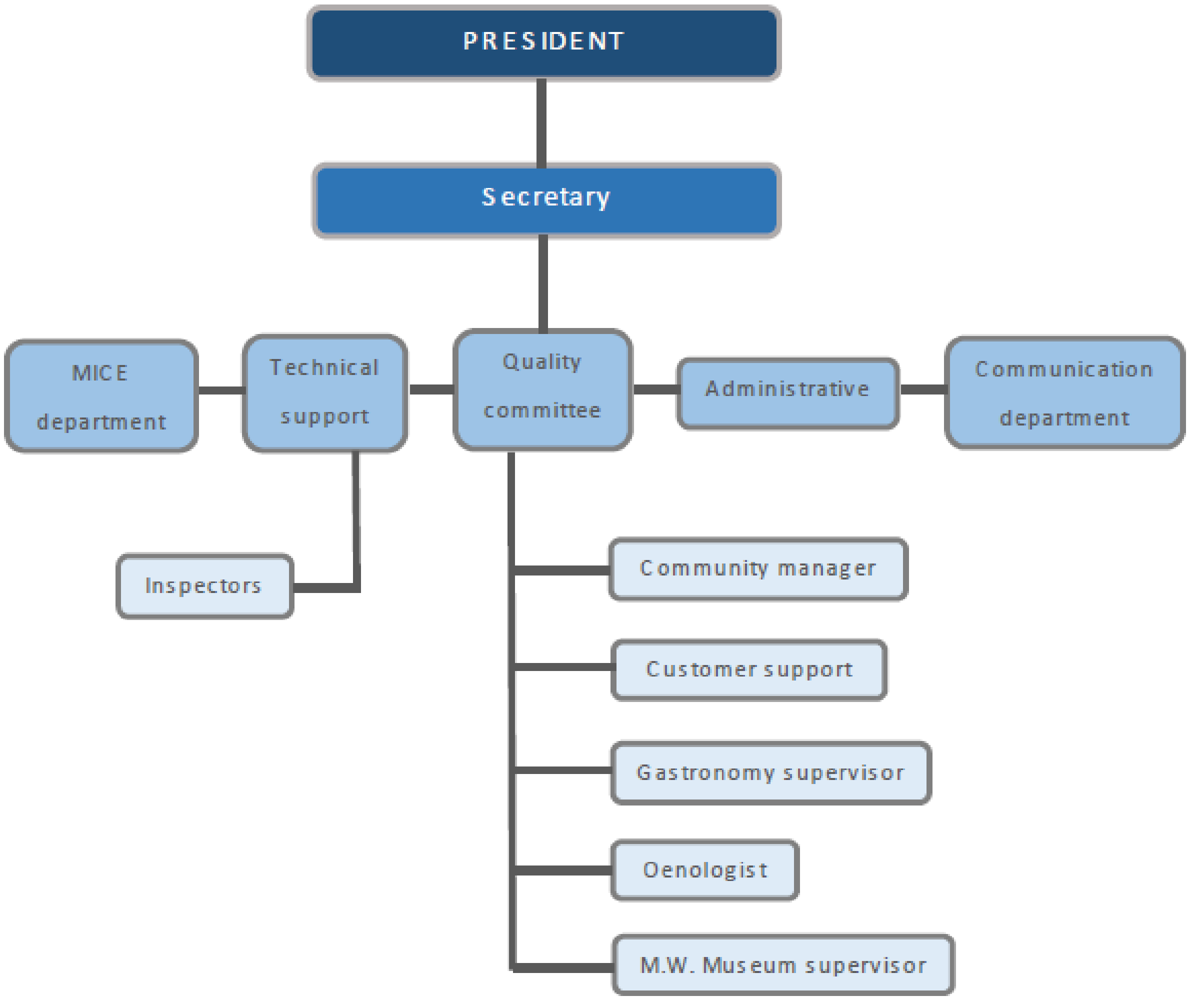
The rest of indicators from the cultural approach, and the economic/regional and long-term goal indicators have been designed only to use them *"a posteriori"* of the timeframe of each activity to know if the activities have been successfully applied. For the cultural approach, the indicators will be mainly verified using a *"Mallorca Wine Experience registry"*; related to the economic/regional approach, the indicators will be checked using official records; finally, for the long-term goal, the indicators will be verified using secondary quantitative data from official records.

5. PROPOSAL FOR USING THE DATA GENERATED

In order to monitor all the activities and control the application of indicators, it is necessary to create a new Regulatory Council for the Mallorca Wine Experience that will cooperate with the Regulatory Council from the D.O. Binissalem. The cooperation between councils is necessary to reach the long-term goal and to overcome the disparity of features between wineries.
The Regulatory Council from D.O. Binissalem will monitor the activities and control the application of indicators from the business approach while the Regulatory Council from M.W.E will handle the activities and indicators from the cultural approach.

As ***Figure 16*** shows, the Regulation Council from Mallorca Wine Experience project will be organized into five sections: MICE department, technical support, quality committee, administrative, and communication department. All sections will be devoted to specific actions: the MICE department will carry out all the actions related to MICE events organization; the technical support section will be composed by inspectors in order to ensure the quality of the building project; the quality department will be divided into five subsections in order to supervise all the quality aspects of the enotourism project; the administrative section will handle the bureaucratic aspects; finally, the communication department will carry out the marketing actions throughout promotional campaigns and TV advertisements.

FIGURE 16. Organization chart of the Regulation Council M.W.E



Source: Own elaboration

Taking into account that the timeframe to develop each output is divided into short (less than 1 year), medium (between 1 and 5 years), and long term (more than 5 years), and that there are three types of outputs in both approaches, both councils will work together from the first activity.

Related to the short-term outputs, there are two (the increase of rosé wine sales, and the monitoring of enotourism) in the business approach and one (the involvement of local residents in the project) in the cultural approach; therefore, after one year there will be a meeting with both councils and winery owners to discuss the results from these outputs and the possible alternatives.

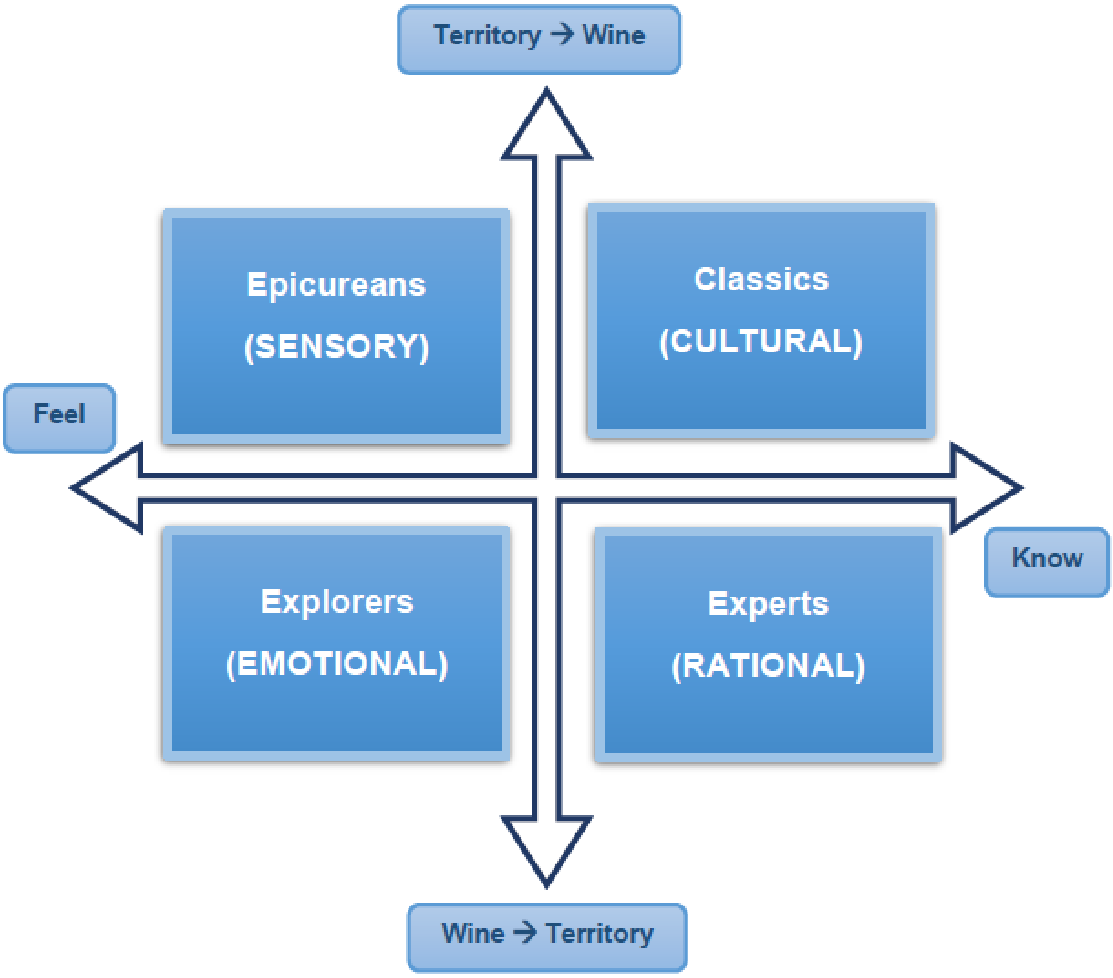
Also, there are seven medium-term outputs (the improvement of the D.O. Binissalem webpage, the cooperation between public and private sectors, the increase of cellar door sales, identify wineries with quality distinctions, the increase of winery visits and their quality, the increase of services offered by the wineries, and the development of a marketing campaign) in the business approach and six (the analysis of the best strategic location for the M.W.E center building, the design of the first, second, third floors, and of the rooftop of that building, and the design of its exterior) in the cultural approach; for this reason, after five years, there will be a meeting with both councils, D.O. Pla I Llevant, private companies, and winery owners.

In addition, there are five long-term outputs (the increase of wine cluster visibility on the internet, the use of new technologies for the innovation in tourism, the education about wine tourism and wine culture, the cooperation with other wine associations, and to carry out promotion actions) in the business approach and four (the visibility on internet about the building project, the customer loyalty, the MICE enotourism activities, and the development of a marketing campaign to inform about the project) in the cultural approach; therefore, after ten years, there will be a meeting with both councils, winery owners, the 5 City Halls, other wine associations, and travel companies.

Because both councils and winery owners will attend all meetings, they are the stakeholders with more importance and influence in the decision-making processes. Therefore, it will be both Regulation Councils and the wineries who meet with the rest of stakeholders, once the long-term goal is reached.
For this reason, after ten years from the project implementation, there will be two meetings once a year to evaluate the situation. One meeting will be handled by the Regulation Council from M.W.E and it will assemble AVIBA, Tourism agency of the Balearic Islands, and the Palma 365 foundation; this meeting will be carried out to discuss the tourism situation of the Mallorca Wine Experience project and the wine cluster in general. The other one will be conducted by the Regulation Council from the D.O. Binissalem and it will bring together the 5 City Halls/municipalities from the wine cluster, Mallorca Rutes, and Mallorca Wine Tours; this meeting will be carried out to discuss the tourist services in the wine cluster. In addition, D.O. Binissalem and D.O. Pla I Llevant will mutually report developments with high frequency.

These meetings and actions intends to monitor and evaluate all the activities to develop an adequate Mallorca Wine Experience project that will attempt to fuse the old and new wine worlds into an enotourism project. In order to understand this fusion, the classic enotourist profile will be explained; it is divided in four sections, according to if the tourist prefers ”feel” wine or “know” about wine and, at the same time, if the tourist goes from territory to wine or vice versa (see ***Figure 17***).

FIGURE 17. Classic enotourist profile



Source: Own elaboration from II Enotourism conference Wine Days Mallorca – D.O. Binissalem

Epicureans are who feel the wine as an experience through an exaltation of senses; they are the majority. An example of wine activity for epicureans is blind tasting. Classics understand wine as a part of the heritage of the wine region. Explorers are willing to talk about wine as alchemy. Experts understand wine as a science; in this group it is possible to include the wine journalists.

As said in section 2, “Old World” can be represented by the cultural and emotional groups while “New World” can be represented by the sensory group. Therefore, Mallorca Wine Experience will embrace the three groups (sensory, cultural, and emotional) in an enotourism project due to it will promote the regional culture while it will lead to the exaltation of senses.

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APPENDICES

A) Questionnaire: Regulation Council

Universitat
de les Illes Balears

Estudi sobre l'activitat enoturística dels cellers adscrits a la D.O. Binissalem.

Sóc na Mª Teresa Frau, estudiant del Màster oficial en Economia del Turisme (UIB). Actualment estic preparant el meu projecte de fi de màster, el qual consisteix en l'anàlisi de la situació actual del clúster vitivinícola de la D.O. Binissalem per a la posterior elaboració d'un pla Enoturístic.

Així, la finalitat d'aquesta enquesta és estudiar l'activitat enoturística actual i potencial de tots els cellers que conformen la D.O. Binissalem. Per la qual cosa, agrairia molt la seva col·laboració per tal d'aconseguir una informació verídica de la situació actual de la D.O. Binissalem.

Tota la informació serà tractada de forma exclusivament confidencial. A més, no es difondrà cap de les empreses aquí citades, a no ser que la pròpia empresa ho autoritzi per escrit. Moltes gràcies.

CELLERS

1. Existeix alguna quota per pertànyer a la D.O. Binissalem?
(Per exemple, un % de la venta de cada botella destinat a la D.O.?)

☐ NO
☐ SI → **Quina / Quantitat?** ____________________

2. Algunes de les bodegues, com per exemple Macià Batle, no tenen visibilitat a la web de la D.O. ni a la programació dels Winedays Mallorca. És això per algun motiu concret?

3. Hi ha alguna bodega en procés d'adscripció a la D.O. Binissalem?

☐ NO
☐ SI → **Quines?** ______________________________

____

____

PROMOCIÓ

1. Existeix una App sobre la D.O. Binissalem?

☐ NO
☐ SI

2. Hi ha alguna revista destinada a informar i divulgar sobre la D.O. Binissalem?

☐ NO
☐ SI → **Quina?** ______________________________

____

3. Quines són les activitats de promoció de la D.O. durant l'any?

____

____

____

____

AJUDES I COL·LABORACIONS

1. Les Ciutats del Vi integrades a l'Associació Espanyola de Ciutats del Vi (ACEVIN) es proposen agrupar interessos i esforços amb la finalitat de disposar d'un espai i d'instruments de reflexió i d'anàlisi estratègic que ajudin a prendre decisions i realitzar propostes. La D.O. Binissalem pertany a ACEVIN?

☐ SI
☐ NO, però és un projecte de futur pertànyer-hi
☐ NO, no es pretén pertànyer a ACEVIN → **Motiu:** ______________________________

____

____

____

____

2. Hi ha intervenció per part del sector privat per desenvolupar activitats enoturístiques?

☐ NO
☐ SI → **Casos:** ____

____

____

____

3. Es rep ajuda d'algun fons, europeu i/o balear?

☐ NO
☐ SI → **Quina?** ____

____

____

Si és possible, agrairia m'enviessin l'organigrama del Consell Regulador per poder-ho incloure al meu projecte de fi de màster; també, si es disposa d'informació actualitzada sobre el perfil dels mercats, ventes, ocupació, etc..

OBSERVACIONS:

Gràcies per la seva col·laboració!

B) ***Questionnaire: Wineries***

Universitat
de les Illes Balears

Estudi sobre l'activitat enoturística dels cellers adscrits a la D.O. Binissalem.

Sóc na Mª Teresa Frau, estudiant del Màster oficial en Economia del Turisme (UIB). Actualment estic preparant el meu projecte de fi de màster, el qual consisteix en l'anàlisi de la situació actual del clúster vitivinícola de la D.O. Binissalem per a la posterior elaboració d'un pla Enoturístic.

Així, la finalitat d'aquesta enquesta és estudiar l'activitat enoturística actual i potencial de tots els cellers que conformen la D.O. Binissalem. Per la qual cosa, agrairia molt la seva col·laboració per tal d'aconseguir una informació verídica de la situació actual de la D.O. Binissalem.

Tota la informació serà tractada de forma exclusivament confidencial. A més, no es difondrà cap de les empreses aquí citades, a no ser que la pròpia empresa ho autoritzi per escrit. Moltes gràcies.

DADES GENERALS

Nom del celler:

Localització:

Hectàrees de cultiu:

Any d'adscripció a la D.O. Binissalem:

Varietats de vi:

Metres quadrats del celler:

Producció mitjana anual (litres i/o botelles):

- ***Preu botella:***

Mitjà:

Mínim:

Màxim:

- ***Empleats:***

Nombre de treballadors al celler:

Formació mitjana i/o més habitual:

- ***Persona que contesta l'enquesta:***

Càrrec:

Gènere:

Edat:

Anys a l'empresa/bodega:

Anys en el sector vitivinícola:

CARACTERÍSTIQUES DEL CELLER, DISTRIBUCIÓ I SERVEIS

1. **Tipologia del celler: Marcar totes les opcions possibles.**

☐ Elaboració

☐ Emmagatzematge

☐ Envelliment

☐ Embotellador i Envasador

2. **Serveis oferts pel celler: Marcar totes les opcions que s'ofereixen.**

☐ Zona especialitzada d'acollida dels visitants

☐ Aparcament

☐ Senyalització

☐ Zona de tast

☐ Enoteca

☐ Accés per a persones de mobilitat reduïda

☐ Serveis de restauració

☐ Possibilitat d'allotjar visitants (*Si escau, marcar propi i/o concertat*)

  ☐ Propi

  ☐ Concertat

3. S'ofereixen tallers regulars de cata durant tot l'any?

☐ NO

☐ NO, només s'ofereixen tallers puntuals

☐ SI

4. Alguna característica diferenciadora del celler:

____

____

____

5. Percentatge de la producció total de cada vi:

Negre: ____________

Rosat: ____________

Blanc: _____________

6. Percentatge de la producció total anual que es ven a Mallorca: __________________

7. Distribució vins; destinació dels vins: Ordenar totes les opcions possibles (1 zona que rep més vi del celler).

☐ Mallorca

☐ Altre illa de les Balears

☐ Resta d'Espanya

☐ França

☐ Itàlia

☐ Alemanya

☐ Anglaterra

☐ Països NO europeus

8. Es rep ajuda d'algun fons, europeu i/o balear?

☐ NO

☐ SI → **Quina?** ____

____

9. Es disposa d'una tenda a la bodega?

☐ NO
☐ SI

10. Es venen productes específics (merchandising) del seu celler (camisetes, copes, gorres, etc...)? Si escau, marcar més d'una opció.

☐ NO

☐ SI, a la tenda de la bodega

☐ SI, a altres tendes → **On?** ____

____

11. El seu celler duu a terme actuacions específiques destinades a realitzar una producció de vi sostenible per al medi ambient?

☐ NO
☐ SI → **Quines?** ____

____

____

____

12. El seu celler posseeix la "Qualificació d'empresa artesanal" i/o la "Carta de mestre artesà vinater"?

☐ NO
☐ SI

13. El seu celler disposa d'un espai privat on es poden realitzar events?

☐ NO
☐ SI

14. Les vinyes estan ubicades al costat, a la mateixa finca, del celler?

☐ NO
☐ SI

15. S'organitzen tallers per a joves i grups escolars?

☐ NO
☐ SI

16. Es pot considerar que hi ha fidelització per part dels clients; és habitual topar-se amb els mateixos clients?

☐ NO
☐ SI
☐ Ns/Nc

17. On es percep més competència?

☐ Dins la pròpia D.O.
☐ A fora de la D.O. → **On (Mallorca, Balears, Espanya, UE, altres països, etc..)?** ________________________________
____
____

☐ Ns/Nc

CARACTERÍSTIQUES DE LES VISITES

1. Visites:

☐ Concertades

☐ Horari establert

☐ NO s'ofereixen → **Per què?** ________________________________
____
____
____

2. ***En el cas de què actualment NO s'ofereixin visites:*** **Es pretenen oferir visites en el futur?**

☐ SI
☐ NO → **Per què?** ________________________________
____
____
____

➔ ***CONTESTAR NOMÉS SI S'OFEREIXEN VISITES:***

3. Quins espais es visiten? Marcar totes les opcions que s'ofereixen.

☐ Zona d'elaboració

☐ Zona de criança

☐ Zona d'embotellament i envàs

☐ Zona de tast

☐ Vinyes

☐ Altres: ______________________________________

4. Durada aproximada de la visita: ________________________

5. Cost visita:

☐ Gratuïta

☐ Depèn del tipus de visita

☐ Preu únic de visita: ______________

6. Existeix un registre de les visites?

☐ NO

☐ SI → **Mitjana de visites anuals al celler:** ____________________

7. Quins són els mesos de més visites?

____

____

8. Percentatge de la producció total anual que es ven directament al celler en les visites: ___________

9. S'ofereixen visites en distints idiomes?

☐ NO

☐ SI → **Quins?** ____

____

10. S'ofereixen diferents visites en funció del tipus de visitant?

☐ NO
☐ SI → **Exemples:** ____
____
____
____

11. Existeix algun element diferenciador a les visites, respecte als altres cellers (concerts, exposicions, etc...)?

☐ NO
☐ SI → **Quin?** ____
____
____
____

12. Es disposa d'una persona encarregada exclusivament d'atendre als visitants?

☐ NO
☐ SI

TIPOLOGIA DEL VISITANT (*CONTESTAR NOMÉS SI S'OFEREIXEN VISITES*)

1. Mitjana d'edat dels visitants:

☐ Menors de 25 anys

☐ 25 – 40 anys

☐ 41 – 55 anys

☐ 56 – 65 anys

☐ Majors de 65 anys

2. Gènere més freqüent: Escriure un % orientatiu sobre el total de visites anuals.

Homes: ____________________

Dones: ____________________

3. Tipus de visita: Ordenar totes les opcions possibles (1 tipus de visita més freqüent i 4 la que menys).

☐ Individuals

☐ Parelles

☐ Famílies

☐ Grups

4. Procedència dels visitants: Ordenar totes les opcions possibles (1 zona de procedència d'on més visitants venen al celler).

☐ Mallorca

☐ Altre illa de les Balears

☐ Resta d'Espanya

☐ França

☐ Itàlia

☐ Alemanya

☐ Anglaterra

☐ Països NO europeus

5. Nivell mig de coneixement vitivinícola per part del visitant:

☐ Nul

☐ Nocions / Baix

☐ Mitjà

☐ Alt / Especialista

6. Despesa mitjana per persona al celler: Enoteca, compra de vi, etc.. (NO s'hi inclou el preu de la visita):

☐ 0 – 5 euros

☐ 5'01 – 15 euros

☐ 15'01 – 25 euros

☐ Més de 25 euros

OBSERVACIONS:

Gràcies per la seva col·laboració!