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From Wine Production to Wine Tourism Experience: the Case of Anatolia, Turkey

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Abstract

Wine tourism was virtually unknown in Turkey until the beginning of the 2000's. Over the last five years there has been a growing interest in wine tourism at wine regions and among the wine lovers and wine producers. Already famous for its antiquities, including many of civilization's most important archaeological sites, the addition of an ancient tradition of wine making enhances Turkey's appeal as an international tourism destination. To better define the Turkish wine industry, it is necessary to consider the characteristics of wine areas in Anatolia, identified by its labels, the amount of quality wine produced, the amount of wineries and the total vine extension. This paper examines the wine regions, development of wine tourism, wine tourism and wine routes in Turkey. Turkish wine production highlights a predominant role played by the Aegean and Thrace regions. Different wine routes seemed to appear with the objective of promoting wine regions, and of offering other options to the traditional sun tourism in the Aegean coast. This paper also emphasizes how the wine regions and wine tourism can be promoted throughout the creation of thematic itineraries that ensures the quality tourism experiences in Turkey and determines the issues on the creation of wine tourism destination image.

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INTRODUCTION

Winery and vineyards visitation have recently become important for both wine producers and wine regions. Wine constitutes an important component of the tourist market in many wine counties. Today, several countries and regions are experiencing the immense growth and benefits flowing from wine marketing and tourism. California and Pennsylvania in the United States, Bordeaux, Champagne and Burgundy in France, Tuscany in Italy, and several districts of Australia and New Zealand stand as significant centers of wine tourism (Var et al., 2006). The economic contribution of wine tourism to wine regions and rural areas is also remarkable. For example one million tourists who attend winery cellar door and spend \$350 million visit South Australia, the most popular wine tourism destination of Australia. Following a similar approach, concentrating efforts on creating wine tourism centers in Turkey will be vitally beneficial to national tourism industry. Turkey is a country with an old wine-producing tradition and with a huge tourism industry, although it has not made the importance of wine tourism profitable, up to now. Due to geographic latitude Turkey has good conditions for viniculture and wine production. However, because of the concentration on sun-sea-sand tourism market, visits to wineries and wine tasting are less important motivating factors for visitors but it is full of potential because of Turkey's favorable situation for grape cultivation.

HISTORY OF WINE IN TURKEY

Wine history in Anatolia dates back to the Neolithic period and there are a number of Neolithic sites in Anatolia (present Turkey). According to archaeobotanists, the grape was first discovered in the region of the East Anatolia, Georgia and Armenia trio. The wild *Vitis Vinifera silvestris* continues to grow in these regions, where today hundreds of cultivars are grown for wine and table grapes. Based on recent archaeological and chemical evidence, a 'wine culture' had been established as early as 6000 BC in the upland region of the Taurus Mountains in Eastern Anatolia, the Caucasus Mountains (including Transcaucasia) and the northern Zagros Mountains of Iran (Vouillamoz and others, 2006; Ergenekon, 2008; Doger, 2004). According to McGovern (2003) the motherland of wine is Eastern Anatolia (see Figure 1).

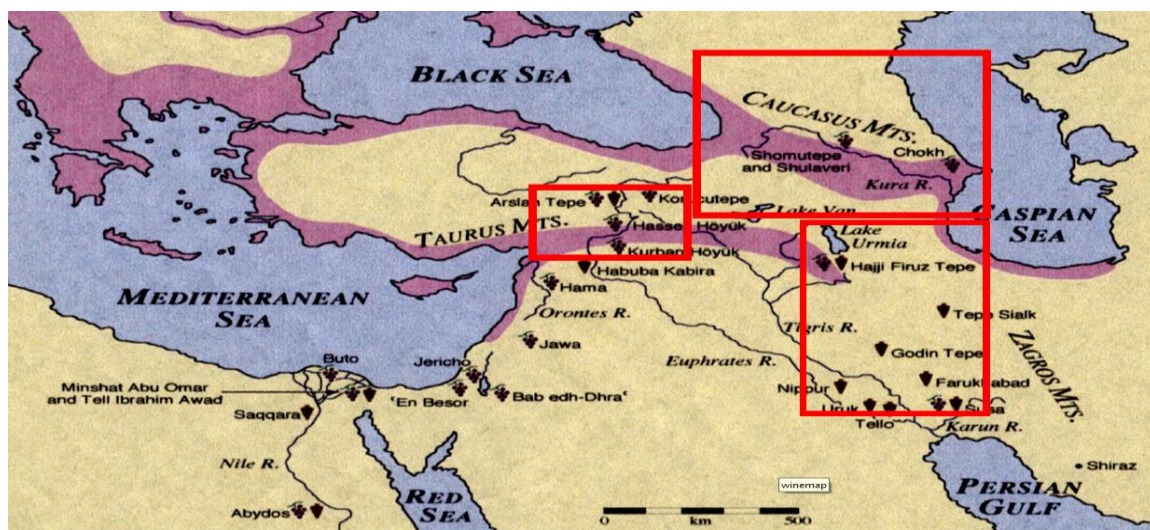


Figure 1. The Eurasian Grapevine *Vitis Vinifera*

Source: Patrick McGovern, Ancient Wine: The Search for the Origins of Viniculture, 2003.

As told in the legend of Noah's Ark, the eastern Anatolia has been a grape cultivation area for hundreds of years. After his Ark coming to rest on Mount Ararat, Noah planted a vineyard, produced wine, and his family drank it. There are parallels between what the Bible tells of Noah and Mount Ararat and what scientists have learned about the origins of wine and winemaking. Mount Ağrı (Ağrı Dağı) is in the eastern Anatolia and is considered today to be the motherland of the wild wine species *Vitis Vinifera sylvestris* (Aktan and Kalkan, 2004).

Wine had an important role in the social lives of the oldest civilizations of Anatolia the Hattis and the Hittites. Wine was offered to Gods in Hittite religious ceremonies. Provisions protecting viticulture in Hittite law, and the custom of celebrating each vintage with a holiday, suggest that wine was important to both ancient economies and ancient cultural practices (Ergenekon, 2008; Doger, 2004).

After the collapse of Hittite Empire the journey of wine continued with the Phrygians. They introduced wine to Greeks when they conquered western Turkey in order to establish trade colonies. Greeks played an important role specially in trading wine by carrying it to different places across the Mediterranean Sea (Ergenekon, 2008; Doger, 2004).

One of the grapes introduced to Europe was Misket, from Turkish origin, became called Muscat by Europeans (Ergenekon, 2008). It is also said that Phoceans - people of Aegean Turkey - when they traveled across the Mediterranean to find the harbor city of Marseilles in Southern France took also some species of grapevine perhaps Muscat (originally Misket) to this country for the first time (6th century B.C) (vinotolia.com, 2010; Bursa Wine Association report, 2007).

According to the legend Dionysus, the God of Wine, was born in the Aegean region of Turkey, Teos near Izmir. The Romans carried on the tradition of growing grapes and winemaking. When Christianity was recognized as the official religion of Roman Empire, the production and the consumption of wine displayed a tremendous increase mainly in monasteries and the other religious centers (vinotolia.com, 2010; Yalçın, 2006).

Grape and wine production continued even after the Turks ruled the Anatolia and Islam began to dominate the region. A comfortable balance developed between Christian and Muslim residents that Christians produced the wine; both Christians and Moslems consumed it (Ergenekon, 2008).

During the long period of the Ottoman Empire (1299-1923), wine production and trade were carried out by non-Muslim minorities (Greeks, Armenians, Syrians, and others) (Yalçın, 2006). In the Ottoman period, the general atmosphere of tolerance was interrupted from time to time by official prohibitions on the use and sale of alcohol. Wine-bars were forced to close and heavy sanctions, even death penalties, were applied. The prohibitions were always short-lived, because the tax collected from wine sales was an important source of income for the Ottoman treasury. Wine production reached record levels and alcohol prohibitions stopped during the second half of the 19th century, in the atmosphere of tolerance and freedom brought about by the Ottoman modernization movement. Meanwhile European vineyards were being devastated by an epidemic of phylloxera (a vine-attacking insect), reducing wine production dramatically (Bulal, 2005; Ergenekon, 2008; Ozdemir, 2013). In order to meet the European demand, the Ottoman Empire's wine exports increased significantly reaching 340 mio liters in 1904 (Ergenekon, 2008; Yalçın, 2006).

There was a considerable amount of wine production before World War I and the War of Independence in Turkey. However wars affected production negatively (Aktan and Kalkan, 2004), especially in the Thrace and Aegean regions. The production of all alcoholic beverages went under the control of government monopoly in 1927, with the exception of wine. In 1928 the government began to support wine producers with technical knowhow and semi-financial support (Ergenekon, 2008; Aktan and Kalkan, 2004).

The 1950's government initiated French grape varieties for plantation in the Aegean and Thrace regions (such as Semillon, Pinot Noir and Cabernet Sauvignon) (Ergenekon, 2008). By the late 1980s, Turkish economy began to integrate with other global economies, the tourism sector began to develop these changes have increased the wine sales. Turkish people rediscovered wine in the 1990s.

GRAPE AND WINE PRODUCTION IN TURKEY

Turkey has more than 1200-1500 grape varieties of which 600-800 are genetically different (vinotolia.com, 2010; winesofturkey.org, 2014) but only a few of them are used primarily in wine production. Turkey has fine local vinifera grapes such as Öküzgözü, Boğazkere and Kalecik Karası (for reds), and Emir and Narince (for whites), all of which can produce quality wine. In addition, grapes of European origin –Cabernet Sauvignon, Merlot, Chardonnay, Sauvignon Blanc- have been grown for many decades.

Currently, Turkey is among the world leaders in grape production (see Table 1 and Table 2). Turkey has the fifth largest grape-growing area at 500.000 ha after Spain, France, Italy, and China (International Organisation of Vine and Wine, 2014). Turkey ranks sixth in the world for grape production with 4 million tons of grape production annually (Food and Agriculture Organization of the United Nations Statistics Division, 2013). Unfortunately only 11% of this huge output is used for wine making (see Table 3 and Figure 2). 52% of the harvested grapes were consumed as table grapes, 37% of grapes were set aside for raisin (TurkStat, 2014).

Table 1. Vineyard Surface Area in 2013

Rank	Country	Vineyard (Ha)	%
-	World	7.519.000	-
1	Spain	1.000.000	13,0
2	France	800.000	10,6
3	Italy	750.000	10,0
4	China	600.000	7,9
5	Turkey	500.000	6,6

Source: OIV (International Organization of Vine and Wine), 2014.

Table 2. Grape Producing Countries in 2013

Country	(000 ton)	%
World	75.100	-
China	11.500	15
Italy	8.000	11
USA	7.700	10
Spain	7.500	10
France	5.500	7
Turkey	4.000	5

Source: Food and Agriculture Organization of the United Nations Statistics Division, 2013.

Table 3. Grape Production in Turkey in 2014

Year	Vineyard Area (Ha)	Production (Ton)	Table Grapes (Ton)	Dried Grapes (Ton)	Wine Grapes (Ton)
2004	520.000	3.500.000	1.900.000	1.230.000	370.000
2005	516.000	3.850.000	2.000.000	1.400.000	450.000
2010	477.000	4.255.000	2.249.500	1.544.000	461.500
2011	472.500	4.296.000	2.269.000	1.562.000	465.000
2012	462.000	4.234.000	2.220.000	1.614.000	400.500
2013	469.000	4.011.000	2.132.500	1.423.500	455.000
2014	467.000	4.175.000	2.166.500	1.563.500	445.000

Source: TurkStat (Turkish Statistical Institute), 2015.

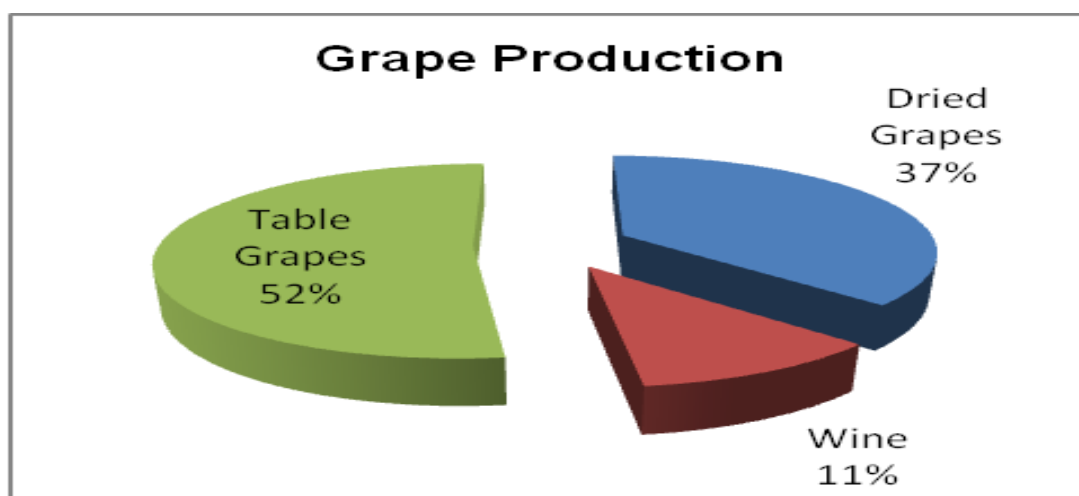


Figure 2. Grape Production in Turkey 2014

Source: TurkStat (Turkish Statistical Institute), 2015.

Despite its huge potential of grape production, Turkey is the forty third wine producer country in the world (OIV, 2014). Turkey’s wine production is around 60,7 mio liters per year which is decreased % 20 in the last 5 years. With its annual yield of 60-70 million liters of wine, Turkey accounts for only %2 of global wine production. Wine exports constitute 4% of total production and by volume is 2.65 million liters and by value \$7-8 million.

According to Tobacco and Alcohol Market Regulatory Agency- TAPDK (2014) records the total alcoholic beverage consumption in Turkey is 1,056 billion liters. Wine consumption constitutes 6% of total alcoholic beverage consumption and it takes second place, after beer (89%) and Rakı (4%-an aniseed-like spirit). Wine consumption per capita is around 1,2 liter per annum.

Table 4. Wine Producing Countries in 2013 (millions of hectoliters)

Rank	Country	(mhl)	%
-	World	271.000	-
1	France	46.000	17
2	Italy	44.000	16
3	Spain	37.000	14
4	USA	22.000	8
5	Argentina	15.000	6
6	Australia	12.000	5
43	Turkey	60	002

Source: OIV (International Organization of Vine and Wine), 2014.

In spite of the long history of grape production, wine production is relatively new in Turkey. More serious development started about 30 years ago, with the lessening of religious influence and favorable governmental policies. There are 166 wine producers licensed by Tobacco and Alcohol Market Regulatory Agency (TAPDK, 2014) of Turkey, but it is a very small number when compared to other wine-making countries. It is estimated that the number of producers are much more than that. Due to the fragmented and often unregistered wine production, it was impossible to identify all wine producers in Turkey. Most Turkish wine producers are small and medium-scale enterprises.

The Turkish wine market is largely dominated by Doluca, Kavaklıdere, and Mey, each with an annual production capacity of more than 10 million liters (Turker, 2011). Boutique wineries began to be seen since the 2000's. In the last few years, the growing enthusiasm of wine consumers and their interest in new tastes has begun to open market space for the smaller wineries. Unfortunately one of the obstacles to the development of wine industry is Turkish government's high tax policies. The Government collects %60 of Private Consumption Tax from Wine.

WINE REGIONS AND WINE TOURISM IN TURKEY

Tourism industry in Turkey has witnessed a rapid development starting from early 80s. Turkey attracts nearly 40 million visitors annually. Turkey ranks 6th in terms of tourist arrivals and 12th of tourism receipts (WTO, 2013). Turkey has usually been seen as a summer destination for tourists, especially for the visitors arriving from Eastern and Central Europe. Tourism strategy of Turkey has long depended on shore tourism since 1980s.

Changing motivations of tourists have shifted today's tourism demand. The industry has diversified towards alternative types of tourism focused on authentic and unique holiday experiences. As the trend toward a wider variety of tourism products emerges, Turkey is well placed to offer highly attractive alternative tourism options. The Turkish government has identified tourism development as a priority target and encourages the development of new forms of alternative tourism that can be perfectly complementing its traditional sun-sea-sand product.

To achieve a sustainable tourism growth, Turkey has to promote new types of tourism which heavily depend on its cultural assets. In this context, wine tourism should be considered as an important and unexplored niche to develop tourism activities. Developing wine tourism is one of the basic tourism strategies in Tourism Strategy of

Turkey 2023. Turkish Ministry of Tourism and Culture has considerable efforts in order to develop wine tourism in the Aegean coast and Central Anatolia (Cappadocia).

Turkey's most developed and productive wine regions are the Thrace (Marmara) and Aegean regions, and Central and Southeastern Anatolia. Winemaking, on the other hand, tends to be concentrated in the western part of the country. The Thrace region accounts for 20 percent of all the wine produced in Turkey. The winemaking tradition that Greeks founded in this area in the past is continued by Turks today in small to medium-sized facilities (Türker, 2011).

Although the Aegean region focuses on table grapes and dried fruit, it is also notable for wine production (35% of Turkey's production). Izmir, Manisa, and Denizli are the main centers of viticulture and winemaking (Turker, 2011).

In Central Anatolia, two centers have important roles in wine industry. One is the town of Kalecik, 65 kilometers northeast of Ankara. It gives its name to the - grape Kalecik Karası. Cappadocia is the other important Anatolian wine-production center; its poor volcanic soil is suitable for grape cultivation. In southern Anatolia, the areas around Diyarbakır and Elazığ produce the best red wine grapes in Turkey; Öküzgözü and Boğazkere.

Black Sea region, with its rainy summers, is not particularly suitable for wine-grape production. Still there are efforts to promote certain black varieties-such as Merzifon Karası (the local grape Merzifon, thought to be the ancestor of the Marzemino grape of Italy) (Yankı, 2009).

By 1990s the increasing interest in quality wines, health articles and Western life style had stimulating effect on the consumption of wine in Turkey. Besides foreign tourists visiting Turkey's popular tourism destinations, have increased the consumption of wine. Changing motivations of tourists, development of alternative types of tourism and increasing interests in wine promote wine tourism in Turkey that travel agencies have started to organize tours daily or weekly for tourists who want to visit the vineyards and taste the quality wines produced by motherland of the grape. Winery and vineyards visitation is an important motivation for domestic tourists that there are lots of tour options departing from Istanbul to the wine regions especially to Thrace and Bozcaada (Bozca Island) during the harvest time (September).

Different wine routes seemed to appear with the objective of promoting wine regions, and of offering other options to the traditional sun tourism in the Aegean coast. One of these routes was developed by Turkish Ministry and Culture within the context of an EU Project titled "The Wine Culture Tourism Exchange" in 2007 (see Figure 3). Turkey is one of the key stakeholders of this project which includes Armenia, Azerbaijan, Georgia, Moldova, Ukraine, Greece, Romania, Bulgaria, Serbia, Croatia, Macedonia, and Bosnia and Herzegovina.

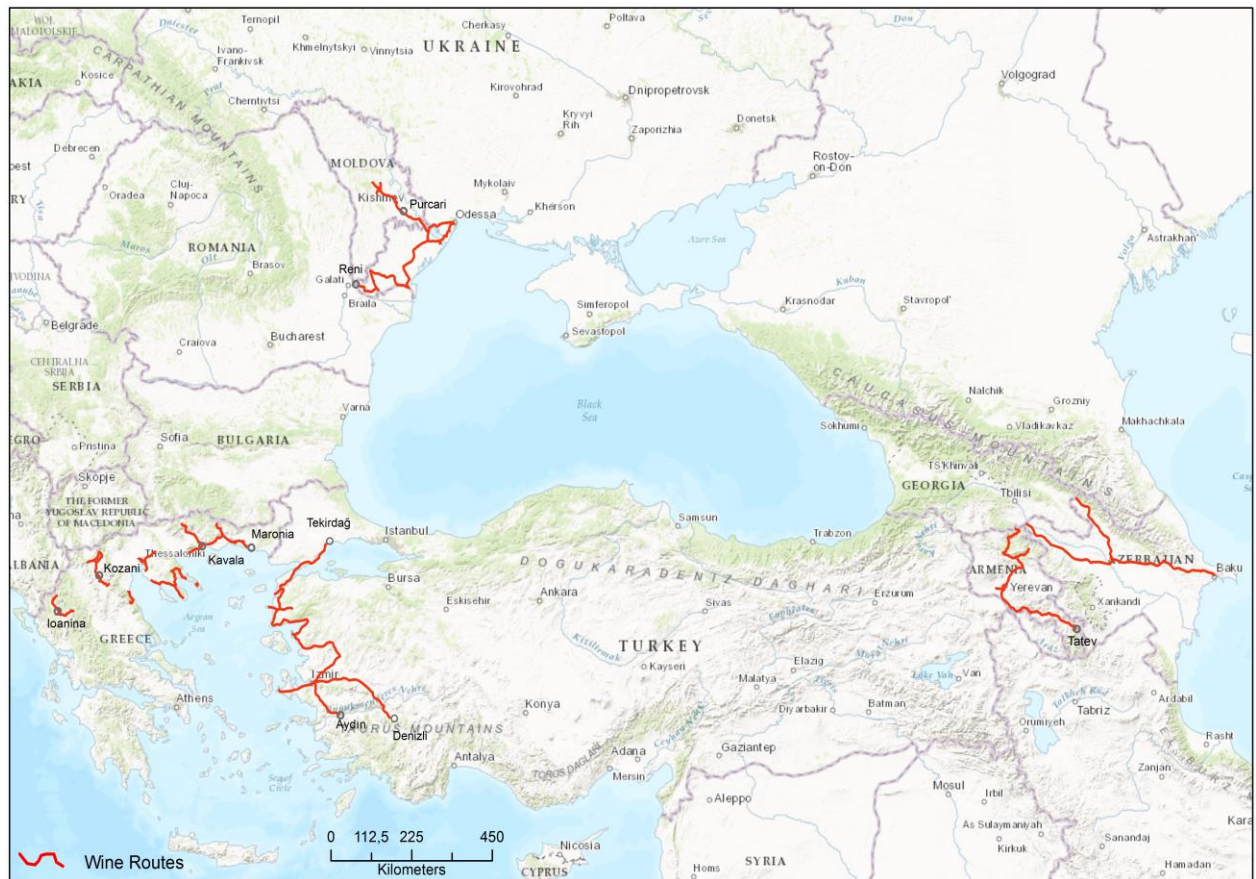


Figure 3: Wine Routes in the context of European Union "The Wine Culture Tourism Exchange" Project.

Source: Adapted from the presentation of Madelena Grossmann, 2009.

Twelve boutique wine producers from Tekirdağ, Şarköy, Kırklareli and Gelibolu have gathered together to promote a new “Vineyard Routes Project” with the support of the Thrace Development Agency (thracewineroute.com, 2015). There have been some other efforts to establish the wine routes of Turkey by the Wines of Turkey Platform, consisted of seven wine producers of Turkey. Two separate routes were developed. The Aegean Route was selected traversing the whole Western Turkey, from the region of Thrace to the South-West and the Central Anatolia route, from Central Anatolia to the Southeast of Turkey (winesofturkey.org, 2014).

Türker (2011) developed three different routes (Thrace, Aegean, Central Anatolia routes) consisting of quality wine makers in “Wine Tourism and Wine Routes of Anatolia” project which was supported by TÜBİTAK (The Scientific and Technological Research Council of Turkey) between January 2010 and January 2011 (see Figure 3).



Figure 4. Wine Routes of Turkey

Source: Nuray Türker, *Wine Tourism and Wine Routes of Anatolia Project Report*, 2011.

On Thrace Route which lies from Kırklareli, along the hilly shore of the Sea of Marmara, to the Gallipoli peninsula and also to Avsa Island and Bozca Island, visitors can spend a week visiting boutique vineyards and tasting wine. On the Aegean wine route, mostly near Izmir, Manisa and Denizli, tourists can experience the beauty of vineyards stretching for miles and miles. Tourists can also visit archaeological sites such as Ephesus, Pergamon, Milet and Aphrodisias, top attractions like the Pamukkale hot springs, and pretty Aegean villages. In Central Anatolia Route where indigenous grape varieties are mostly used for wine production visitors can visit wineries, taste wine and also experience the unique atmosphere of Cappadocia.

There are some prominent wine tourism destinations in Turkey. Şirince is known throughout Turkey for the wine it produces. Şirince Village, an old style Greek settlement, is very attractive and it is famous for its homemade wines. It is very close (5 miles) to the world famous Ephesus open-air museum. Making and selling wine has considerably become an important income source for the village. Local tourists visit Şirince regularly to buy local produced wines. Currently, an average of 20.000 tourists visit Şirince each month (Selçuk Tourism Information Office, 2014). All through the village there are shops where visitors can taste and buy wines.

Bozcaada, a lovely small island in the north Aegean, is famous for its wines. One third of the island is covered with vineyards (Türker, 2011). There are six local wineries (namely Ataoğ, Corvus, Talay, Gülerada, Amadeus and Yunatçılar) produce wine on the island. Being a major wine producing center, Bozcaada supplies around 5-10% of Turkey's wine. Tourists can taste and buy different kinds of wine on the shops of each winery and can also observe

the production process during the taste. All the wineries have tasting rooms to attract tourists, especially in the summer months (June-September).

There are wine festivities on the Island which are held every year. Traditional Wine Tasting Days is held in June every year and is organized by local wine producers with the support of the local administration and the Municipality. August and September are the months of the grape harvest on Bozcaada. 'Bağbozumu' (vintage) is the name given to grape harvest. The grape harvest festival, prepared by the Bozcaada Municipality each year on the first weekend of September has become a traditional celebration on the island.

In the central Anatolia there are daily tours combined with the precious attractions of Cappadocia. Visiting vineyard, tasting wine are the main attractions of the area for wine tourists. The Turasan and Kocabağ wineries are the prominent names in the region; each year they are visited by thousands of tourists for wine tasting.

CONCLUSION AND FUTURE IMPLICATIONS

For the future development of wine tourism the obstacles to the development of wine industry should be solved. According to the State Planning Organization Report in 2000, the major problems of the wine sector in Turkey are as follows (Özdemir, 2013);

1. Despite the excellent wine-growing climate of the country, the wine grape quality and quantity are insufficient.
2. The wine-producing sector is not using the thousand-year-old wine culture and wine history.
3. There is a lack of training for grape producers in wine grape production.
4. The wine production technology is not up to date.
5. The domestic wine culture and wine drinking habits need to be promoted.
6. The taxes on the wine sector are very high.
7. The advertising for wine is insufficient.

In spite of the size of Turkish grape production and the emerging wine industry, wine tourism has not yet been recognized for its potential by the wine producers. Many wine producers and wine regions have not, to date, organized their wine tourism product. Sevil and Yüncü (2009) identified in their research that tourism is often a secondary product for wine makers, their primary focus is on grape growing and wine production, but they are willing to get involved in wine tourism. Researchers also found out that wine tourism is seen as a significant marketing tool - a way to advertise their brand within the wine industry – especially important due to advertisement restrictions on alcoholic beverages on Turkey.

A long term strategic approach should be developed and implemented for the development of wine tourism considering the successful wine tourism countries such as France, Italy, Spain, Australia, USA, Canada and etc. To illustrate, EU wine tourism strategies for wine route destinations are aimed at the promotion of sustainable and high-quality oenotourist development, protection and improvement of life quality of the inhabitants of the territory,

improvement of the tourist offer quality, training of the main actors, promotion of the natural and the historical heritage of wine and finally supporting the local economy (European Paper on Wine Tourism,2006).

Wine tourism in South Australia (SA), one of the most developed wine tourism destinations in the world, is considered a tool for creating competitive advantage (Getz and Brown, 2006). SA has multiple wine tourism strategies such as building a cohesive, focussed and sophisticated wine and food tourism industry, increasing the visitation of tourists, extending the length of stay, adding value to the cellar door experience, education of wine tourism stakeholders, marketing regional wine and food experiences (South Australian Food and Wine Tourism Strategy, 2009).

Ontario (Canada) created strategies to establish a quality wine and culinary tourism destination in both domestic and international markets. To this end The Ministry of Tourism, Culture and Recreation (MTCR) and the Wine Council of Ontario (WCO) prepared the Ontario Wine and Culinary Tourism Strategy comprising Niagara and Toronto wine destinations. The strategy concentrated on enhancing the wine route experience, encouraging the private sector to establish more accommodation facilities, developing packages and itineraries, increasing the level of training of front line staff, building on the many complementary tourism attractions and visitor appeals in the area (Ontario Wine and Culinary Tourism Strategy, 2001).

Wine tourism can be the core business for many small wineries in Turkey. For small wineries wine tourism is an opportunity for increased margins and brand awareness. Wine producers are key elements of wine tourism, and an important determinant of wine tourism experience quality. In order to initiate wine tourism development in Turkey wineries should take the leading role. Wine product and wine related activities in Turkey should be planned with the collaboration of wineries in a given area. For example, groups in social media, such as Wines of Turkey and Wines from Turkey as well as the Thrace Wine Route, which is established by 12 wineries to promote wines, vineyards, and vintage activities in Turkey. Partnerships among wineries and allied tourist facilities such as hotels and restaurants should also contribute to increasing wine tourism. Forming alliances with restaurants and bed and breakfast establishments in the surrounding area is an important way to promote wine tourism and has the potential to attract tourists to the region. In Australia there is a network of relationships between the wineries, tourist authorities and government agencies which creates a strong synergy and makes the territory attractive (Boatto and Gennari, 2011).

Such concerted efforts must be coordinated by a central organization such as a wine institute or association like Wines of Turkey Platform. In order to promote alliances among wineries, it is recommended that a centralized organization be established in order to plan and coordinate activities. Its board of directors should include wine producers and representatives of the Ministries of Agriculture and Tourism. Such an organization may be designed similar to those in Australia, California, Chile and France, for example, and become marketing, rather than just production orientated. In France, a cooperative effort by a consortium of wineries led to the founding of research institutes, a wine museum and the organization of wine routes. It should work together with the Ministry of Tourism, wineries and the tourism industry to foster cooperation.

Turkish tourism operators should develop varied wine tourism products, which can then be combined with other attractions such as local food and activities i.e. wine festivities. Wine tourism destinations in Turkey should incorporate local food and beverages into the tourism product. The sale of these types of products can also help to promote and enhance the identity of the destination.

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