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Report: GastroTourism in South Africa and Georgia: Current business models, training needs and local development opportunities

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Summary

This deliverable provides a comprehensive analytical review of the policies, strategies, and innovation dynamics that shape the development of gastronomy and wine tourism across Europe, South Africa, and Georgia. Developed within the framework of the GastroTour project (Skilling for Impact: University-Industry Partnerships for Local/Regional Gastronomic Tourism), the report seeks to identify transferable lessons, emerging opportunities, and challenges that can guide the design of capacity-building actions, business innovation models, and cross-regional cooperation within Work Package 2.

Purpose and Scope

The document's primary objective is to establish a solid empirical and conceptual foundation for subsequent project activities related to skills development and innovation in gastronomy tourism. By examining three distinct yet complementary contexts; Europe, South Africa, and Georgia, the report demonstrates how gastronomy functions as a strategic tool for local development, entrepreneurship, and cultural diplomacy. The analysis emphasizes the cross-sectoral nature of gastronomic tourism, where agriculture, hospitality, culture, and education converge to generate sustainable economic value and strengthen territorial identity.

Beyond comparative description, the report positions gastronomy and wine tourism as drivers of transformation within post-pandemic tourism ecosystems. It explores how each region translates global trends, such as the experience economy, digital transition, and sustainability, into localized models that respond to social, economic, and environmental priorities. In this sense, the report contributes to a broader understanding of how gastronomy tourism can serve as a bridge between innovation policy and community-based development.

Methodological Approach and Sources

The analytical framework combines multiple layers of evidence. Official policies and strategic documents from the European Commission, UNWTO, OECD, and national tourism administrations provide the institutional background. Sectoral reports from Vinpro, SAWIS, GNTA, and the National Wine Agency offer economic and market insights. Academic and grey literature supply theoretical and empirical perspectives on innovation, experience design, and skills development. These are complemented by specialized press coverage and data portals (UNWTO, WTTC, Eurostat, World Bank) that illustrate how gastronomy tourism is communicated, measured, and benchmarked globally.

This triangulation of sources ensures that the report not only synthesizes academic and policy knowledge but also captures the operational realities faced by SMEs, tourism professionals, and community-based enterprises. As such, D.2.2 provides a multidimensional view of gastronomy tourism, combining policy analysis, economic evidence, and human capital perspectives within a coherent narrative framework.

Comparative Findings and Emerging Patterns

Across all three contexts, gastronomy and wine tourism are evolving from niche activities into strategic pillars of tourism development, cultural valorisation, and rural regeneration. The analysis identifies four overarching trends:

Business Model Innovation:

Tourism enterprises are shifting from product-oriented models to experience-driven, hybrid formats that blend physical and digital engagement. European SMEs are pioneering direct-to-consumer strategies (wine



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clubs, subscription services), while South African wineries diversify through storytelling, township cuisine, and wine-and-dine events. Georgian operators leverage heritage-based formats such as supra feasts and qvevri winemaking to enhance authenticity and visitor immersion.

Institutional and Support Structures:

Effective governance and coordination mechanisms are crucial to overcome fragmentation. Europe benefits from mature structures such as Iter Vitis, Great Wine Capitals, and Smart Specialization Strategies. South Africa relies on provincial wine routes and public-private partnerships (e.g., Wesgro, Wines of South Africa), while Georgia's ecosystem is supported by the Georgian National Tourism Administration, the National Wine Agency, and international donors (EBRD, World Bank, EU-ENPARD). These mechanisms illustrate the need for multi-level cooperation to connect small producers, hospitality actors, and local communities.

Skills Development and Human Capital:

Skills shortages are a universal constraint. European SMEs struggle with digital competences and data-driven marketing; South Africa faces deficits in culinary professionals, sommeliers, and service quality; and Georgia reports shortages in foreign languages, hospitality training, and wine interpretation. The analysis underlines the need for modular, practice-oriented, and industry-aligned training models, combining vocational education, work-based learning, and international mobility schemes such as Erasmus+.

Sustainability and Inclusivity as Cross-Cutting Values:

Sustainability has become a defining element of competitiveness. European frameworks integrate eco-certifications, local sourcing, and regenerative practices; South African policies emphasize empowerment and inclusive value chains; Georgia positions authenticity and cultural preservation as its sustainable advantage. Together, these approaches align gastronomy tourism with the Sustainable Development Goals (SDGs) and the European Green Deal.

The comparative analysis also highlights complementary strengths. Europe contributes institutional maturity and innovation toolkits; South Africa offers insights into inclusive, socially transformative tourism; and Georgia exemplifies authenticity, cultural depth, and heritage-based development. These complementarities form a strong basis for mutual learning and cross-regional cooperation.

Implications for European Cooperation and Capacity-Building

For European projects and stakeholders, D.2.2 offers a strategic blueprint for transnational collaboration. The report demonstrates how European experiences in business model innovation, sustainability certification, and digital upskilling can be adapted to strengthen the competitiveness of SMEs in South Africa and Georgia. Conversely, European actors can benefit from exposure to different paradigms of inclusion, authenticity, and community-driven tourism practiced in partner regions.

The findings directly inform subsequent GatroTour deliverables, particularly those focused on developing training modules, innovation manuals, and digital resources. Recommendations include:

- The co-creation of interregional training modules that integrate entrepreneurship, storytelling, and digital marketing skills.
- The design of innovation toolkits (e.g., Business Model Canvas adaptations) to support SMEs in



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transitioning toward hybrid and experience-based services.

- The establishment of knowledge exchange platforms connecting universities, vocational institutions, and industry partners for ongoing collaboration.
- The promotion of policy dialogues on sustainability and inclusivity as shared priorities within EU–Africa–Eastern Partnership cooperation frameworks.

Contribution to the GastroTour Project and Long-Term Impact

Beyond its analytical function, D.2.2 serves as a cornerstone document that consolidates knowledge, strengthens conceptual clarity, and supports the practical implementation of the GastroTour project's objectives. By situating gastronomy tourism within the broader context of sustainable innovation and skills development, the report provides the evidence base for subsequent work on pilot projects, teaching resources, and repository materials.

Ultimately, this deliverable reinforces the project's overarching vision: to build resilient, innovative, and inclusive gastronomic tourism ecosystems that connect local producers, educational institutions, and tourism enterprises through knowledge transfer and capacity-building. In doing so, it contributes to the long-term competitiveness and sustainability of gastronomy tourism in Europe, South Africa, and Georgia—turning food and wine into vehicles for cultural connection, economic resilience, and social transformation.

1. Policy and Strategic Frameworks for Gastronomy and Wine Tourism

This section analyses the European and international policy frameworks that shape the development of gastronomy and wine tourism. It situates these sectors within broader agendas such as the European Green Deal, digital transition, and sustainable rural development. The analysis highlights how supranational bodies, particularly the European Commission, UNWTO, and OECD, promote gastronomy tourism as a strategic pillar of innovation, inclusivity, and territorial identity. By examining the cases of Europe, South Africa, and Georgia, this section provides the institutional and regulatory context that underpins business model innovation and capacity-building across regions.

In the European and international landscape, gastronomy and wine tourism have been progressively elevated from niche activities to strategic pillars of sustainable development, regional competitiveness, and cultural preservation. The European Commission has positioned tourism as a transversal policy field that contributes to the Green Deal, digital transition, and rural revitalization. In this framework, gastronomy tourism occupies a privileged role: it not only strengthens regional identity but also acts as a lever for economic diversification, particularly in rural and peripheral regions where traditional agricultural production can be combined with tourism services.

Policy direction in the post-COVID era has been especially clear. The EU's agenda stresses recovery through innovation, sustainability, and digitalization, all of which intersect with the gastronomic tourism sector. The Interreg BASCIL project (2023–2025) is a flagship example, offering training modules based on the Business Model Canvas to rural food producers. These modules aim to support SMEs in shifting from product-focused activities to diversified tourism offerings, such as farm visits, culinary workshops, or hybrid models that blend on-site and digital experiences. Such initiatives reveal how European policy is actively fostering entrepreneurial capacity, equipping local producers with practical tools to reach both domestic and international markets.

The European Commission's Transition Pathway for Tourism (European Commission, 2022) establishes a coordinated roadmap to accelerate the twin transition of the tourism ecosystem, digital and green. The document identifies 27 key actions structured around themes such as skills, resilience, digitalization, sustainability, and investment. It reinforces that post-COVID recovery must be guided by circular economy principles, smart mobility, and digital transformation.

According to the Transition Pathway, more than 90% of European tourism SMEs identify digital skills as essential, yet only 50% have integrated digital tools into operations, a gap mirrored in the gastronomy and wine tourism sectors reviewed in this report.

At the international level, the World Tourism Organization (UNWTO) has framed gastronomy and wine tourism as vehicles for inclusive growth and sustainable development. Since 2016, the UNWTO Global Forums on Gastronomy and Wine Tourism have served as platforms to share best practices, encourage public-private partnerships, and consolidate a shared understanding of what constitutes “gastrotourism.” These forums frequently highlight innovation trends, such as storytelling-based visitor experiences, digital

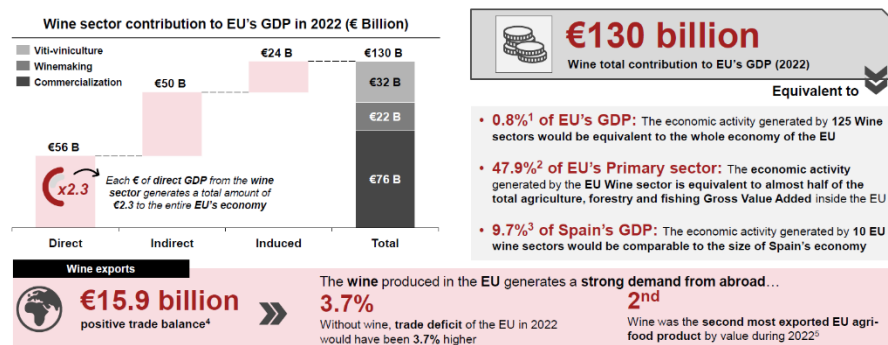
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engagement strategies, and the integration of gastronomy into broader cultural tourism offers. By showcasing destinations as diverse as South Africa, Georgia, and Spain, UNWTO situates gastronomy tourism within a global policy narrative that emphasizes authenticity, heritage valorization, and community participation.

Economic evidence further reinforces the policy momentum. A 2024 PwC report commissioned by the EU estimated that 36 million tourists engaged in wine-related tourism in 2022, generating approximately €15 billion in spending, including over €1 billion directly at wineries, museums, and visitor centers. This economic weight underscores the sector's resilience and its potential as a cornerstone of Europe's tourism recovery strategy. Complementary data from OECD and Eurostat demonstrate how culinary experiences increase visitor spending, extend average length of stay, and create strong spillover effects in accommodation, retail, and transport sectors.

Beyond its tourism impact, the *Economic, Social and Environmental Importance of the Wine Sector in the EU* report (PwC, 2024) provides a broader picture of the sector's macroeconomic significance. The European Union accounts for **62 % of global wine production**, generating a combined **market value of €100 billion** across its value chain, from viticulture and winemaking to commercialization. In 2022, the wine sector contributed **€130 billion to the EU's GDP** (equivalent to 0.8 % of total GDP) and sustained approximately **2.9 million jobs** (1.4 % of total employment). This demonstrates that gastronomy and wine-related activities are not peripheral products but central pillars of Europe's rural economies, cultural identity, and innovation capacity.

Figure 1. The Wine Value Chain and Economic Contribution of the EU Wine Sector



Source: PwC (2024).

The European policy ecosystem also provides institutional structures of support. The European Region of Gastronomy awards, coordinated by IGCAT, incentivize destinations to innovate in gastronomy-based development strategies, connecting tourism with local food systems, creative industries, and education. In parallel, Smart Specialization Strategies (S3) implemented by several EU regions explicitly integrate food and wine clusters, encouraging innovation networks that bridge agriculture, hospitality, and tourism. These structures offer a platform for cross-border learning and provide visibility to regions willing to position themselves as gastronomic leaders.

Beyond direct tourism policy, EU funding instruments are increasingly mobilized to strengthen gastronomic tourism. COSME and Erasmus+ projects have supported SME internationalization and vocational training for hospitality professionals. Horizon Europe has funded research on digital innovation in tourism, exploring the use of big data, immersive technologies, and sustainability indicators—tools highly relevant



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for gastronomic tourism SMEs seeking to enhance competitiveness. Similarly, Creative Europe projects have incorporated culinary heritage into cultural programming, emphasizing gastronomy as an expression of Europe's intangible heritage.

An important trend in capacity-building is the recognition of skills gaps and the need for tailored training. Reports from the New Tourism Generation (NTG) Alliance underline shortages in digital competencies, storytelling abilities, and entrepreneurial skills among tourism SMEs. Gastronomy tourism, with its reliance on high-quality interpretation, cross-cultural communication, and hybrid service delivery, epitomizes these challenges. As a result, European projects are increasingly embedding training components—ranging from digital marketing to sustainable food sourcing, to equip SMEs with the competencies needed to thrive in a rapidly evolving market.

At the international level, the *Guidelines for the Development of Gastronomy Tourism* (UNWTO & Basque Culinary Center, 2019) provide a structured framework for destinations seeking to integrate gastronomy within sustainable tourism strategies. The Guidelines emphasize the need for **strategic planning, governance models, and participatory mechanisms** that connect gastronomy with local identity, cultural heritage, and the Sustainable Development Goals (SDGs). They recommend developing gastronomy tourism as a comprehensive value chain, linking producers, processors, tourism operators, and cultural institutions, while promoting inclusivity, innovation, and territorial cohesion. This global perspective provides an important reference for understanding how European, South African, and Georgian policies align with UNWTO's principles of sustainable destination management.

Taken together, these frameworks reveal a strong policy consensus: gastronomy and wine tourism are not ancillary products, but core components of sustainable tourism ecosystems that generate economic, social, and cultural value. For European cooperation projects, this context is particularly valuable, as it provides a robust foundation of transferable lessons, available funding mechanisms, and tested tools. It also highlights where innovation is most urgently needed: in the design of business models that combine authenticity with scalability, in support structures that connect small producers with international markets, and in training systems that align educational provision with real industry needs.

1.1 South Africa

In South Africa, gastronomy and wine tourism have been formally recognized as strategic levers for diversification and transformation within the national tourism economy. Policy frameworks over the past decade illustrate a consistent effort to integrate food and wine experiences into mainstream tourism, while also embedding social inclusion and heritage valorization.

At the national level, the National Department of Tourism (NDT) has outlined a clear policy direction through the Framework for Gastronomy Tourism Development (c. 2020), the National Tourism Sector Strategy 2016–2026, and the Tourism Recovery Plan 2020–2022. These documents collectively identify wine and culinary tourism as high-potential niches, particularly suited for post-COVID recovery and for addressing long-standing challenges of economic inequality. Importantly, they emphasize gastronomy not merely as an add-on but as an opportunity to integrate township cuisine, indigenous food traditions, and the empowerment of black-owned wineries into the broader tourism offer.

Skills development and training are central to this agenda. A Tourism Skills Audit (2017) conducted by NDT revealed acute shortages in culinary professionals, sommeliers, and hospitality service staff. In response, targeted initiatives were launched, including a pilot Tourism Incubator for small and medium enterprises (SMMEs) and specialized training programs that reached over 500 chefs. These interventions



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demonstrate recognition that policy must not only create enabling conditions but also actively address human capital deficits, particularly in specialized skills such as wine stewardship, customer service, and digital marketing.

At the provincial and regional level, support structures have been developed to operationalize national strategies. In the Western Cape, Wesgro and the Department of Agriculture implemented action plans around the 23 officially mapped wine routes, positioning them as integrated tourism corridors. These routes, supported by Wines of South Africa (WoSA) and local tourism boards, act as both marketing platforms and cooperative business models, bringing together wineries, restaurants, accommodations, and event organizers. South African Tourism (SAT) has complemented these initiatives with campaigns such as Feast Africa, designed to showcase culinary diversity while promoting storytelling as a way of adding cultural depth to food experiences. In addition, the South African Wine Industry Professional Body (SAWIPB) develops skills and supports training across the wine value chain, including wine tourism. It identifies industry-specific occupations, defines learning criteria, and coordinates training and continuous professional development (CPD) to address skills gaps and improve employability. SAWIPB promotes professional standards through a shared Code of Conduct, designates qualified practitioners, and works with stakeholders and international partners to align skills development with industry needs.

Innovation trends in South Africa are particularly visible in the evolution of business models. Many wineries have moved beyond traditional tastings to develop experience-centric offers that combine wine, cuisine, and narrative. Examples include vineyard safaris, blending workshops, and farm-to-fork dining concepts. These models align with the global shift towards experiential tourism, where value is increasingly generated through memory-making and personal engagement rather than through product sales alone. A growing focus on sustainability, driven in part by WoSA's sustainable wine tourism programs—further signals a shift towards business models that combine environmental stewardship with socio-economic transformation.

Another defining characteristic of South African policy is its commitment to inclusivity. By 2025, the sector aims to elevate black-owned wineries, currently numbering 81 farms and 107 brands, as central attractions within the country's wine tourism portfolio. This ambition reflects a broader socio-economic transformation agenda, linking tourism development with empowerment, redistribution, and community participation. The integration of township food tours, indigenous ingredients, and cultural heritage dining experiences into tourism strategies underscores this trend.

South Africa's approach also benefits from international cooperation. The country has engaged in knowledge-sharing with global partners, including the EU, through dialogues facilitated by the UNWTO and OECD. Collaborative research initiatives, such as the OECD Tourism Trends and Policies reports, position South Africa within global benchmarking exercises on innovation and sustainability in tourism. Moreover, South African stakeholders have participated in EU-funded training and exchange programs under Erasmus+ (notably in hospitality and culinary arts), creating opportunities for skill transfer and professional mobility. South African universities and training institutions also collaborate with European counterparts in research projects supported by Horizon Europe, particularly in areas linked to digital innovation, climate adaptation, and sustainable food systems, which indirectly strengthen the foundations of gastronomy tourism.

Beyond the EU, South Africa has been active in international donor-funded projects that mirror European priorities, such as sustainable value chains, rural tourism development, and SME digitalization. These collaborations ensure that the South African experience is not isolated but embedded within broader global



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discussions on how to leverage gastronomy tourism as a tool for inclusive and innovative growth.

1.2 Georgia

In Georgia, gastronomy and wine tourism have been explicitly positioned as strategic pillars of the country's tourism development over the last decade. This reflects both the country's globally recognized 8,000-year wine-making heritage and the increasing international appeal of its distinctive cuisine. Policy frameworks and donor-supported initiatives consistently emphasize the dual role of gastronomy tourism: as a driver of economic diversification in rural regions and as a means of strengthening Georgia's cultural diplomacy and international visibility.

The National Tourism Development Strategy 2015–2025, branded "Country of Life", identified wine and culinary heritage as central to Georgia's transformation into a year-round, high-value destination. Implementation is coordinated by the Georgian National Tourism Administration (GNTA), which has developed campaigns such as Visit Georgia, Embrace its Cuisine and facilitated the creation of thematic wine and food routes across multiple regions. GNTA also oversees annual participation in international food fairs and exhibitions, positioning Georgian gastronomy within the global tourism marketplace.

In addition, Georgia has actively promoted its winemaking heritage through campaigns such as "Georgia – The Cradle of Wine", grounded in extensive historical and archaeological evidence positioning the country as one of the world's oldest wine-producing regions.

A central narrative in this branding effort is the notion of "8,000 continuous vintages," emphasizing that Georgia is the only country where winemaking has been practiced uninterrupted for eight millennia.

Another key message highlights the country's exceptional biodiversity: over 525 indigenous grape varieties have been documented, underscoring the millennia-old tradition of cultivated viticulture and reinforcing Georgia's status as a unique and authentic wine destination.

Policy implementation has been reinforced by specialized institutions. The National Wine Agency regulates wine appellations, organizes wine festivals, and supports international marketing, while the Georgian Gastronomy Association collaborates with government and donors to professionalize the sector, for example through international chef exchanges and culinary festivals. These bodies provide the support structures necessary to transform gastronomy into a coherent tourism product, connecting producers, hospitality businesses, and cultural operators.

Another key actor is the *Biological Farming Association Elkana*, a non-governmental organization that has played a central role in connecting sustainable agriculture with gastronomic and wine tourism. Elkana promotes organic farming, local food systems, and rural entrepreneurship, and has implemented several EU- and donor-funded initiatives that support farm-to-table models, agrotourism, and the preservation of indigenous grape varieties. Through partnerships with GNTA, the Ministry of Environmental Protection and Agriculture, and international donors, Elkana contributes significantly to positioning Georgia as a sustainable and community-based gastronomic destination.

A landmark initiative in this institutional framework was the creation of the Georgian Wine Route in 2012, developed by the Georgian National Tourism Administration (GNTA) in partnership with USAID. Conceived as a national wine tourism product, the route was designed to showcase Georgia's 8,000-year-old winemaking tradition while offering visitors a coherent journey through the country's diverse wine regions.



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The Georgian Wine Route connects a broad network of wineries, family-owned vineyards, wine cellars, and cultural heritage sites, creating an immersive experience that integrates wine, gastronomy, and cultural discovery. The initiative also contributes to sustainable tourism development and regional economic growth by enhancing the visibility and market access of small and medium-sized wine producers across Georgia.

Innovation in product development has been a strong feature of Georgia's policy approach. Beyond traditional wine tastings, destinations have introduced experiences such as cooking classes in Tbilisi, supra (traditional feast) demonstrations, and immersive tours of qvevri (clay vessel) winemaking. These models align with experiential tourism trends and reflect a deliberate effort to extend visitor stays, increase average spending, and foster community participation. However, studies supported by the Black Sea Cross-Border Cooperation (Sea of Wine project, 2020–2023) also identify persistent challenges, including infrastructure deficits (poor transport and accommodation capacity in rural wine regions) and the need for integrated product development that bundles gastronomy with cultural and outdoor activities.

Despite the sector's creativity and authentic assets, several challenges remain that constrain sustainable growth and quality consistency. Georgia's wine tourism offers, while diverse and widely distributed across regions such as Kakheti, Imereti, Kartli, Guria, Adjara and Samtskhe-Javakheti, remains unevenly developed, with limited infrastructure and professionalization in rural areas. Tourists encounter highly variable service standards, and many small operators lack structured product development or storytelling capacity.

Moreover, the rapid expansion of niche experiences, such as family-run guesthouses, qvevri-shaped glamping accommodations, vineyard yoga, or wine spas, has outpaced the establishment of quality certification and training frameworks. As highlighted by studies supported by USAID and the Black Sea CBC "Sea of Wine" project, the main priorities include improving transport and hospitality infrastructure, enhancing staff skills in foreign languages and customer service, and developing coherent destination management mechanisms that can connect small producers to larger tourism networks.

Addressing these gaps will be crucial for ensuring that Georgia's innovation in wine and gastronomy tourism translates into long-term competitiveness and sustainable regional development.

Skills development and training needs remain central to Georgia's gastronomy tourism agenda. A recent assessment by Georgian academics (Kekelidze & Kvachantiradze, 2023) identified acute shortages of skilled staff in rural areas, particularly in foreign language competence, sommelier and wine education, customer service, and digital marketing. Employers often recruit untrained workers, while vocational programs remain misaligned with industry requirements. Donor-funded programs have addressed these gaps: for instance, the European Bank for Reconstruction and Development (EBRD) and the World Bank supported GNTA in launching a digital upskilling initiative for SMEs during the COVID-19 recovery phase. Similarly, USAID and EU-ENPARD projects have invested in capacity-building for rural producers, encouraging guesthouse development and farm-to-table business models.

Georgia's integration into international cooperation frameworks has been a critical driver of progress. The country has actively participated in EU-funded cross-border programs, such as Black Sea CBC projects promoting wine route development and community-based tourism. Partnerships with the World Bank, UNWTO, and EBRD have further strengthened institutional capacity, providing policy recommendations, digitalization support, and infrastructure investments. These collaborations align Georgia's gastronomy tourism sector with European standards and provide a platform for the transfer of know-how on innovation, sustainability, and SME support.



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1.3 Comparative Insights and Relevance for European Projects

A comparative reading of the European, South African, and Georgian frameworks reveals both shared trajectories and distinctive national approaches to gastronomy tourism. Across all three contexts, gastronomy and wine are increasingly positioned not as secondary attractions, but as central pillars of tourism development strategies. This convergence signals a global recognition that food and wine experiences represent high-value, resilient, and culturally rich segments capable of driving innovation in business models, generating rural economic benefits, and reinforcing cultural heritage.

Common trends emerge clearly. First, all three contexts highlight the need for business model innovation. In Europe, this is reflected in the integration of entrepreneurship training tools such as the Business Model Canvas and in the development of hybrid models that combine on-site experiences with digital engagement (e.g., virtual tastings and online subscriptions). In South Africa, innovation has taken the form of diversifying beyond wine tastings to include storytelling, township food tours, and immersive vineyard experiences. In Georgia, heritage-based models, such as qvevri winemaking and supra feasts—are being reimaged as experiential products that extend visitor stays. These examples demonstrate that gastronomy tourism is moving toward models based on authenticity, co-creation, and memory-making, rather than transactional consumption.

Second, there is a consistent emphasis on support structures. Europe benefits from an institutionalized ecosystem of awards, smart specialization strategies, and EU funding instruments that connect regions and SMEs to innovation networks. South Africa has established strong regional structures through wine routes, marketing boards, and incubators, while Georgia relies heavily on GNTA, the National Wine Agency, and international donor partnerships. In all cases, the effectiveness of gastronomy tourism depends on intermediaries that facilitate cooperation among small producers, hospitality businesses, and destination managers. This reflects a shared understanding that fragmented sectors like gastronomy require coordination mechanisms to scale up and reach international markets.

Third, skills and training needs are a cross-cutting issue. Both South Africa and Georgia face acute shortages in hospitality and gastronomy skills, with gaps identified in sommelier training, foreign languages, customer service, and digital competences. Europe, although more advanced in training provision, still reports mismatches between vocational education and the evolving demands of tourism SMEs, particularly regarding digitalization and sustainability. This alignment of challenges points to the importance of capacity-building as a central component of gastronomy tourism strategies, and highlights opportunities for mutual learning through mobility programs, vocational exchanges, and joint curricula development.

Despite these similarities, differences of context and priority also emerge. South Africa frames gastronomy tourism within a broader socio-economic transformation agenda, focusing on empowerment, inclusion, and the redress of historical inequalities. Georgia, by contrast, situates gastronomy tourism at the intersection of nation branding and rural development, with heavy reliance on international cooperation and donor support to bridge structural gaps. Europe positions gastronomy tourism as a driver of sustainability and innovation, leveraging advanced institutional frameworks and funding mechanisms. These distinctions offer valuable lessons for cross-regional cooperation: South Africa's focus on inclusivity can inform European debates on social sustainability, while Georgia's heritage-based innovation provides insights into how cultural authenticity can be transformed into competitive advantage.

For European projects, the comparative insights translate into actionable relevance. The combination of



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shared challenges (skills gaps, need for SME support, demand for innovation) and complementary strengths (institutional frameworks in Europe, inclusivity in South Africa, authenticity in Georgia) creates fertile ground for knowledge exchange. European cooperation initiatives, whether through Interreg, Horizon Europe, Erasmus+, or ENI/IPA programs, can draw on these complementarities to design capacity-building modules, digitalization toolkits, and policy dialogues that respond to real industry needs.

Furthermore, the alignment of gastronomy tourism with broader policy agendas such as the European Green Deal, the SDGs, and cultural heritage protection provides a unifying framework for cooperation. Embedding gastronomy tourism within sustainability and innovation strategies not only strengthens its legitimacy but also ensures that interventions resonate with wider societal goals.

Aligning with the Transition Pathway for Tourism (European Commission, 2022), the GastroTour analysis suggests that future cooperation projects should integrate measurable actions under the three transition pillars:

- **Sustainability and circularity:** adoption of local food systems, waste reduction, and resource efficiency;
- **Digitalization:** implementation of data-driven marketing, virtual experiences, and smart route management;
- **Resilience:** strengthening SME adaptability through training, investment access, and community-based governance.

The Pathway's framework thus provides a concrete roadmap for translating the policy ambitions of the European Green Deal into actionable priorities within gastronomy tourism.



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2. Sectoral and Industry Dynamics: Trends, Performance, and Innovation

This section reviews key industry and market reports to identify how gastronomy and wine tourism operate as economic and cultural engines in Europe, South Africa, and Georgia. Drawing from sources such as PwC, Vinpro, SAWIS, and GNTA, it explores evolving business models, market structures, and post-pandemic recovery trends. Special attention is given to SMEs' innovation capacity, digital transformation, and sustainability integration. The comparative analysis at the end of the section synthesizes transferable lessons for European cooperation, emphasizing how each region's industry data and market behavior inform strategies for competitiveness and inclusive growth.

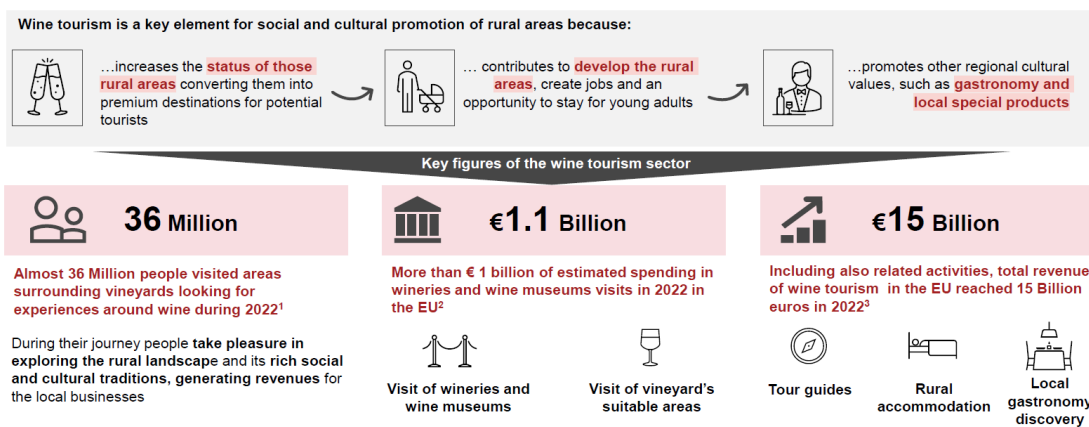
2.1 Europe (Transferable Insights)

In the European context, sector and industry reports consistently underline the growing significance of gastronomy and wine tourism as both economic drivers and cultural assets. The UNWTO Global Report on Food Tourism (2019) noted that gastronomy plays a decisive role in extending tourist stays and increasing local spending, with food and beverage experiences often representing a key motivation for travel. This aligns with findings from the World Food Travel Association's Food Travel Monitor, which documents the steady rise in consumer interest for farm-to-table experiences, culinary storytelling, and immersive food and wine activities, particularly in the aftermath of the COVID-19 pandemic.

Business models in Europe illustrate a diversification trend. The traditional cooperative model of wine routes, such as those established in Spain, France, and Italy, remains a cornerstone, providing structured networks that integrate wineries, accommodations, and cultural attractions. However, many destinations have moved beyond conventional cellar-door sales to adopt direct-to-consumer strategies such as wine clubs and subscription models that maintain customer engagement long after a visit. The pandemic accelerated the adoption of hybrid models, where virtual tastings and e-commerce complement physical visits, creating new revenue streams and engaging broader international audiences.

Complementing these insights, the *Economic, Social and Environmental Importance of the Wine Sector in the EU* report (PwC, 2024) provides quantitative evidence of the scale and economic significance of wine tourism in Europe. The study estimates that almost 36 million visitors engaged in wine-related experiences across EU member states in 2022, generating €15 billion in total revenues and over €1 billion in direct spending at wineries and museums. These figures highlight that wine tourism is not a niche activity but a strategic pillar of rural revitalization, contributing to employment, local business growth, and cultural valorization.

Furthermore, the PwC report emphasizes that wine tourism acts as a catalyst for **regional diversification**, fostering synergies between agriculture, hospitality, and cultural industries. The findings align closely with the European Commission's Transition Pathway for Tourism (2022), which identifies gastronomy and wine as high-impact sectors for advancing digitalization, sustainability, and community-based innovation.

Co-funded by
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Source: PwC (2024).

Innovation and differentiation are further reinforced through sustainability and cultural heritage integration. Certifications such as organic and biodynamic labels have become powerful marketing tools, while initiatives like the Slow Food Travel program promote ethical sourcing and storytelling as part of the visitor experience. Similarly, the Council of Europe's Iter Vitis wine route positions wine as part of Europe's cultural itineraries, embedding gastronomy tourism within broader heritage frameworks. These approaches demonstrate how European destinations leverage values of sustainability, authenticity, and culture to remain competitive in a saturated market.

Recent market analyses confirm the robustness of this sector. Consulting reports (e.g. Grand View Research, 2024) forecast annual growth rates of around 12–13% for wine tourism globally, with Europe maintaining more than half of the global market share by value. A 2023 Vinetur study highlighted that Italy, Spain, and France continue to dominate visitation, yet also noted increasing diversification across emerging wine regions in Central and Eastern Europe. Importantly, these reports stress that innovation is not confined to leading destinations: smaller regions are also experimenting with cross-sectoral partnerships, digital platforms, and creative storytelling to attract niche markets.

From a training and skills perspective, European industry bodies highlight persistent gaps in digital competences and storytelling abilities among SMEs. Reports from the New Tourism Generation (NTG) Alliance note that many small businesses remain slow in adopting online booking systems, data-driven marketing, or social media engagement. As digitalization becomes an indispensable part of tourism delivery, this skills gap represents both a challenge and an opportunity for capacity-building initiatives, especially those supported by EU funding.

For European cooperation projects, these insights offer transferable lessons. The evolution of business models, towards direct-to-consumer engagement, hybrid physical-digital services, and co-created experiences, demonstrates how SMEs can build resilience in uncertain environments. The integration of sustainability and cultural heritage illustrates strategies to create added value, while persistent skills gaps highlight the continued relevance of training and capacity-building. Overall, European sector and industry reports provide a solid benchmark that can inform both South Africa and Georgia, offering not only best practices but also cautionary lessons about the risks of fragmented implementation or slow digital uptake.



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2.2 South Africa

In South Africa, industry reports and sectoral analyses have played a key role in mapping the current state and potential of wine and gastronomy tourism. Research conducted by Vinpro (South African Wine Producers Association) and Wesgro, particularly the South African Wine Tourism Visitor Research 2022, provides detailed insights into visitor profiles, motivations, and spending patterns. The study, based on over 8,000 consumer surveys, revealed that domestic tourists account for approximately two-thirds of wine tourism demand, with many livings within 40 kilometers of wine estates. At the same time, the United Kingdom, United States, and Germany remain the leading international markets. This dual orientation—strong domestic base combined with key foreign segments, creates both opportunities and challenges for product development and marketing.

The economic significance of the sector is underscored by findings from SA Wine Industry Information & Systems (SAWIS), which estimated that wine tourism contributed R9.3 billion (around €500 million) to South Africa's GDP in 2022. This represented 17.3% of total winery turnover and supported approximately 40,000 jobs. The analysis also revealed that micro-wineries (with annual turnover under R10 million) are particularly reliant on tourism, deriving up to 36% of their revenue from wine tourists, compared to about 20% for larger estates. This demonstrates how tourism functions as a lifeline for smaller producers, who often depend on direct sales at cellar doors, hospitality activities such as farm restaurants and guesthouses, and event hosting.

Industry commentary stresses that business models are evolving from traditional tastings toward more holistic and experience-driven offerings. Increasingly, wineries are combining wine with gastronomy, storytelling, and personalized service to enhance visitor satisfaction and spending. Initiatives include wine-and-food pairings, themed festivals, and immersive experiences that highlight the heritage of the Cape Winelands. However, gaps remain in the systematic use of customer relationship management (CRM) tools, with too few wineries collecting and leveraging visitor data to build loyalty and direct-to-consumer sales channels.

On the culinary side, reports and campaigns by South African Tourism (SAT) have emphasized the country's diverse food culture as an under-utilised asset. Culinary tourism routes, township food experiences, and chef-led initiatives have gained momentum, supported by collaborations with industry bodies such as the South African Chefs Association and EatOut magazine. These partnerships have expanded the gastronomic offer, drawing attention to indigenous ingredients, Cape Malay traditions, and the vibrant braai (barbecue) culture as attractions.

Recent trends highlight a strong push towards inclusivity and sustainability. Projects supported by Wines of South Africa (WoSA) aim to integrate black-owned wineries into mainstream wine tourism routes, positioning them as flagship attractions for domestic and international visitors alike. Sustainability is also becoming a competitive differentiator, with wineries adopting environmentally responsible practices and using them as part of their storytelling to appeal to conscious consumers.

Overall, sector and industry reports illustrate a dynamic yet uneven landscape. On one hand, South Africa boasts a diverse wine and culinary offer, a strong domestic market, and an expanding reputation internationally. On the other, the industry continues to face challenges in digitalization, CRM adoption, and human resource development. For European cooperation projects, these insights underline the importance



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of targeted interventions that can help SMEs professionalize their business models, adopt digital tools, and leverage South Africa's rich cultural diversity as a source of competitive advantage.

2.3 Georgia

Georgia's wine and gastronomy tourism sector has undergone rapid growth over the past decade, supported by both domestic strategies and international donor projects. Prior to the COVID-19 pandemic, Georgia welcomed approximately 1 million wine tourists in 2019, representing around 13% of all international visitors (UNWTO). This strong demand reflected the country's unique positioning as the birthplace of winemaking, combined with a cuisine rich in cultural symbolism. The pandemic temporarily slowed this momentum, but recovery initiatives supported by the EU and other partners have contributed to a resilient rebound.

To encourage the development of the wine industry and promote wine tourism, several associations have been established, such as the Natural Wine Association, Imeretian Wine Association, Women in Wine Industry (WIWI), and the Georgian Sommelier Association. These organizations play a key role in strengthening collaboration within the sector and fostering growth, helping to position Georgia as a dynamic and emerging player in the global wine market.

Interest in local wine culture continues to rise, particularly through popular annual wine festivals that have been running for over a decade, including New Wine Festival, Zero Compromise, and Amer-Imeri.

From a gastronomic perspective, Gemo Fest stands out as a prominent event that highlights regional cuisines and attracts both local and international visitors. (More information: gemofest.ge)

Additionally, wine clubs operating mainly in major cities such as Tbilisi, Kutaisi, and Batumi host regular wine tastings, workshops, events, and presentations, further cultivating a vibrant wine culture across the country.

A notable example is the "Wine Routes: Development of Wine Tourism Destination" study (GCAD, 2023), conducted within the Black Sea CBC Sea of Wine project (2020–2023). This research provided a comprehensive analysis of post-COVID recovery, highlighting persistent challenges such as limited infrastructure in wine regions (poor road access, shortage of accommodations) and the need to diversify products beyond wine tastings. The report recommended bundling gastronomy tourism with cultural heritage, outdoor recreation, and rural experiences to extend visitor stays and increase local benefits.

Updated data from the *Georgian National Tourism Administration Statistical Review 2024* (GNTA, 2024) further underscore the growing importance of gastronomy within Georgia's tourism economy. International tourist arrivals increased by **29% compared to 2022**, confirming a robust post-pandemic recovery. Food and beverages remain the **largest category of visitor expenditure**, accounting for **28.3% of total spending**, while participation in **food and wine tasting experiences reached 77% of all international visitors**. These figures confirm that gastronomy continues to be the most popular and economically significant tourism activity, reinforcing its role as a key driver of rural development and regional diversification.

Business models in Georgia are diversifying in response to demand. Alongside traditional cellar visits, new offerings include cooking classes in Tbilisi, farm-to-table restaurants in rural areas, guesthouse-based hospitality, and package tours such as "Kakheti wine & dine." Community-based initiatives are also emerging, with family-owned wine cellars receiving grants to improve facilities and host international



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visitors. These developments align with experiential tourism trends but face challenges in professionalization, as many local hosts lack formal hospitality training.

Industry commentary and donor assessments frequently stress the need for skills development. A 2023 study by Georgian academics identified critical shortages in foreign language skills, customer service, sommelier training, and digital marketing among tourism workers. Employers often bypass formal education, relying on untrained staff, while vocational programs remain poorly aligned with industry needs. To address this, donors such as the World Bank, European Bank for Reconstruction and Development (EBRD), and USAID have supported targeted training. For example, the World Bank's 2021 recovery package included digital upskilling for SMEs, while EU-ENPARD projects have encouraged the development of rural guesthouses and culinary tourism businesses.

Georgia's unique selling proposition (USP) lies in its authenticity. Traditional practices such as qvevri winemaking (recognized by UNESCO as Intangible Cultural Heritage) and supra feasts (ritualized banquets with strong cultural narratives) distinguish Georgia from other wine destinations. These elements provide powerful storytelling opportunities, but the sector still needs to invest in professional marketing, international service standards, and destination management to maximize competitiveness.

Overall, Georgian sector and industry reports paint a picture of strong demand and cultural richness, coupled with persistent structural barriers. The country has significant potential to use gastronomy tourism as a tool for rural revitalization and international branding, but progress depends on bridging infrastructure gaps and addressing skills shortages. For European cooperation projects, Georgia represents a fertile ground for pilot initiatives: its authenticity and growing demand create opportunities for innovation, while its institutional and capacity-building needs make it an ideal partner for knowledge transfer and training programs.

2.4 Comparative Insights and Relevance for European Projects

The sector and industry reports from Europe, South Africa, and Georgia converge on several key themes: the growing demand for authentic food and wine experiences, the importance of SME-driven innovation, and the persistent challenges of skills and infrastructure gaps. Yet, they also reveal distinct trajectories shaped by context, priorities, and institutional capacity.

Shared trends across the three regions highlight a global shift toward experience-driven business models. In Europe, wineries and culinary destinations are diversifying into direct-to-consumer wine clubs, hybrid virtual tastings, and immersive cultural itineraries. South African producers are combining wine with food pairings, heritage storytelling, and township cuisine, reflecting a deliberate strategy to broaden participation and enhance inclusivity. Georgian operators, while less professionalized, are tapping into authenticity—through qvevri winemaking, supra feasts, and rural hospitality, as their primary competitive advantage. These examples collectively underscore the global evolution from product-centric to co-creative, memory-based tourism models.

A second commonality is the recognition of support structures as vital for sector organization and growth. Europe benefits from long-established networks such as wine routes, industry associations, and international benchmarking systems (e.g., Great Wine Capitals, Iter Vitis). South Africa has developed regional wine routes supported by agencies like Wesgro and Wines of South Africa, creating cooperative platforms for marketing and product bundling. Georgia, in turn, relies heavily on donor-funded projects and institutions like GNTA and the National Wine Agency to fill coordination gaps. The lesson here is that effective support mechanisms, whether formal networks or donor partnerships, are indispensable for overcoming the inherent fragmentation of gastronomy tourism.



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Skills and training needs also emerge as a cross-cutting challenge. European SMEs face persistent gaps in digital competences and data-driven marketing, despite having more advanced institutional support. South Africa's skills audit flagged shortages in culinary professionals, sommeliers, and customer service staff, which are being addressed through incubators and targeted training. Georgia struggles with foreign language abilities, sommelier expertise, and basic hospitality competences, often relying on untrained workers. Across all contexts, the alignment of training provision with industry needs is a recurrent issue. This creates an opportunity for European projects to introduce capacity-building modules, vocational exchanges, and joint curricula development that can benefit all partners.

Despite these similarities, differences of emphasis provide complementary lessons. Europe's industry is characterized by strong institutionalization, mature networks, and access to significant funding streams, but it faces the challenge of maintaining competitiveness in a saturated market. South Africa positions gastronomy tourism within a transformation and empowerment agenda, showcasing how tourism policy can be harnessed for broader socio-economic goals. Georgia's trajectory demonstrates the potential of heritage-based tourism development, while also exposing the vulnerabilities of young sectors that depend heavily on donor support and lack sufficient infrastructure.

For European cooperation projects, these comparative insights are particularly valuable. They reveal that while the regions operate under different socio-economic and institutional conditions, they share pressing needs in SME innovation, digitalization, and training. European projects can leverage this alignment to design transnational initiatives focused on:

Business model innovation: Sharing toolkits (e.g., Business Model Canvas applications) and hybrid service models tested in Europe with South African and Georgian SMEs.

Capacity-building and training: Addressing cross-cutting skill gaps through Erasmus+ exchanges, vocational training modules, and digital upskilling.

Support structures and networks: Strengthening existing wine routes, incubators, and donor-funded clusters through cross-border cooperation and benchmarking.

Sustainability and inclusivity: Transferring lessons on certifications and ethical food systems from Europe, while integrating South Africa's empowerment strategies and Georgia's heritage-based approaches.

In conclusion, the comparative analysis of industry reports highlights a convergence of opportunities: gastronomy tourism is globally recognized as a high-value, resilient sector, but its potential depends on innovation, coordination, and skills. For European projects, this creates a fertile ground for collaboration—using Europe's institutional maturity, South Africa's inclusivity agenda, and Georgia's authenticity to co-design interventions that advance sustainable, innovative, and socially inclusive gastronomy tourism across partner regions.

3. Academic and Grey Literature Context: Knowledge Foundations and Innovation Pathways

This section synthesizes academic research and grey literature to establish the conceptual and empirical foundations of gastronomy and wine tourism. It connects theoretical frameworks, such as the experience economy and business model innovation, with empirical findings on skills gaps, sustainability, and destination competitiveness. Through a comparative lens, it reviews studies from Europe, South Africa, and Georgia, highlighting shared challenges and distinctive innovation trajectories. The final subsection introduces neuromarketing as an emerging analytical frontier, demonstrating how emotional and sensory engagement can enhance the design of gastronomic experiences and training models.

Academic and grey literature in Europe and at the international level underline the strategic role of gastronomy tourism within broader debates on the experience economy, cultural sustainability, and rural development. Scholars consistently argue that food and wine experiences embody the principles of the experience economy (Pine & Gilmore, 1999), where value is generated not by the tangible product but by the intangible, memorable engagement with place, heritage, and community. In this sense, gastronomy tourism becomes a means of staging cultural encounters that extend visitor stays, stimulate local economies, and strengthen territorial identity.

Business Model Canvas (BMC) has been increasingly applied in academic studies of gastronomy and wine tourism to map how SMEs innovate their value propositions, customer relationships, and revenue streams. Research by Garibaldi (2022) and others highlights how wineries and culinary SMEs across Europe have diversified from traditional production and cellar-door sales to new customer segments (e.g., locals seeking leisure activities), new distribution channels (online booking platforms, wine clubs, and subscription services), and new partnerships (tour operators, cultural institutions). These insights resonate with EU-funded initiatives such as the BASCIL Manual (2023), which provides practical guidance for rural food producers on designing sustainable and innovative business models for culinary tourism.

A recurrent theme in both academic and grey literature is the skills gap affecting tourism SMEs. Studies point to deficits in digital competences, entrepreneurial abilities, and interpretive storytelling. The New Tourism Generation (NTG) Alliance has stressed that despite rapid digitalization accelerated by COVID-19, many SMEs lack expertise in social media marketing, e-commerce, or data analytics, leaving them at a disadvantage in reaching global audiences. This is echoed in reports from the European Commission, which underline the urgency of modernizing vocational training to include digital skills, sustainability practices, and intercultural communication.

Grey literature from networks and projects further illustrates innovation trends. The Slow Food Travel program connects gastronomy tourism to ethical food systems, emphasizing sustainability, community benefit, and authentic storytelling. The Council of Europe's Iter Vitis wine route embeds wine tourism into cultural itineraries, showcasing how culinary heritage can be framed as part of Europe's shared identity. Meanwhile, the European Region of Gastronomy initiative (IGCAT) fosters innovation by encouraging regions to link food with creativity, cultural industries, and education, positioning gastronomy as a cross-sectoral driver of development.



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Collectively, these academic and grey sources reveal a dual dynamic: while Europe has a well-developed institutional and policy framework for gastronomy tourism, SMEs continue to face structural barriers in terms of skills, digitalization, and access to markets. For European cooperation projects, these insights provide an evidence-based foundation for designing interventions that strengthen SME competitiveness, promote innovative business models, and address persistent training needs. Importantly, they also show that gastronomy tourism, when embedded in broader sustainability and cultural strategies, can function as a catalyst for systemic innovation across rural and regional economies.

3.2 South Africa

Academic and grey literature position South Africa's gastronomy and wine tourism as levers for local economic development (LED), destination differentiation, and post-pandemic resilience. Rogerson's work (2020) synthesizes how food experiences, rooted in indigenous cuisines, Cape Malay heritage, and market-producer linkages, can catalyze LED when anchored in networks that connect farms, markets, restaurants, and tour operators. These studies argue that co-created, place-based experiences raise willingness-to-pay and spread benefits to rural communities, provided governance and skills systems keep pace.

Policy-facing grey literature complements this academic framing. The National Department of Tourism's Framework for Gastronomy Tourism Development in South Africa outlines a structured approach to routes, product development, and stakeholder training, making explicit the link between culinary heritage, SME upgrading, and inclusive growth. The document emphasizes coordinated action across provincial actors and industry bodies so that food and wine become integrated, year-round propositions rather than add-ons.

A salient theme in both literatures is the experience economy and its managerial implications. Studies highlight how wineries and culinary SMEs shift from transactional tastings to staged, interactive experiences, cellar and vineyard tours, blending workshops, and storytelling that ties terroir to culture, to generate memorable value and repeat business. During COVID-19, research on wine tourism shocks showed that the estates which rapidly adopted virtual tastings, e-commerce, and local delivery buffered revenue declines and then blended these digital channels with on-site offers in recovery, an early example of durable hybridization in South African contexts.

The role of chefs emerges as a branding and demand-generation vector. An analysis in the African Journal of Hospitality, Tourism and Leisure documents how South African Tourism began featuring leading chefs on its official channels, effectively personifying destination identity and translating culinary credibility into market appeal. This literature suggests that chef visibility, media partnerships, and festival circuits can function as gateways into broader regional itineraries (e.g., wine routes plus township cuisine experiences).

Human capital is repeatedly identified as a binding constraint. The NDT Skills Audit flagged shortages in culinary professionals, wine stewards/sommeliers, and frontline service skills, prompting incubators and targeted upskilling programs. Regionally, the SADC Tourism Skills Gap assessment echoes these deficits, customer service, communication, digital, supervisory/management, while critiquing overly theoretical training models and endorsing work-integrated learning for faster industry alignment. Together, these sources argue for modular, practice-led curricula (wine service, pairing, storytelling, digital marketing) tailored to SME realities.

Cross-cutting sustainability and inclusion agendas permeate the grey literature. Gastronomy tourism is framed as a channel to advance SDGs through shorter value chains, food-waste reduction, and community participation; in South Africa this intersects with transformation goals (e.g., elevating black-owned wineries on established routes). The implication for program design is to embed sustainability competencies



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(sourcing, waste, energy) and inclusive supplier development into training and certification pathways for culinary and wine SMEs.

3.3 Georgia

Academic and grey literature consistently frame Georgia's gastronomy and wine tourism as a dual engine of nation branding and rural regeneration, grounded in the country's 8,000-year winemaking heritage and distinctive culinary traditions. Scholarship and policy briefs converge on the idea that food and wine experiences function as high-value cultural products that extend length of stay, raise local spending, and disperse benefits to peripheral regions, provided that skills, infrastructure, and destination management mature in tandem.

A robust empirical backbone comes from GNTA monitoring and donor-backed studies. According to the *Statistical Review of Tourism in Georgia 2024* (GNTA, 2024), international tourist arrivals increased by 29% compared to 2022, signaling a strong recovery trajectory. Food and beverage spending remains the largest component of visitor expenditure, representing 28.3% of total tourist spending, while participation in food and wine tasting experiences reached 77% of all international visitors. These updated figures confirm that gastronomy continues to be Georgia's most popular and economically impactful tourism activity, reflecting its growing contribution to rural development and regional resilience.

Grey literature from Black Sea CBC projects, especially "Sea of Wine: Development of Wine Tourism Destination" (2020–2023), provides the most complete post-pandemic diagnosis. Findings emphasize persistent infrastructure gaps in wine regions (road access, accommodation capacity), limited professionalization among micro-operators, and the need to bundle cellar experiences with cultural heritage, outdoor activities, and farm-to-table dining to lengthen stays and raise average spend. The reports recommend coordinated route management, quality standards, and targeted SME support to move beyond tasting-only offers.

On the business-model front, academic cases and donor briefs document a steady shift from winery visits toward experience-centric formats: hands-on qvevri (clay amphora) immersion, supra (ritual feast) demonstrations, cooking classes, family-cellar hosting, and rural guesthouse hospitality. These models leverage authenticity as a unique selling proposition while opening new revenue lines (workshops, pairing menus, small events) and deepening place-based storytelling, yet they also surface capability needs in service quality, safety, and reservation/CRM systems.

The skills agenda is a recurrent through line. A 2023 academic assessment highlights acute shortages in foreign languages, customer service, sommelier/wine education, and digital marketing, noting employers' reliance on untrained staff and misalignment between vocational curricula and industry needs. Donor programmed (World Bank, EBRD, USAID, EU-ENPARD) responded with digital upskilling, mentoring, and grants for product upgrading, positive steps that remain unevenly diffused across rural regions and micro-SMEs. The literature consistently calls for modular, practice-based learning and stronger academia–industry links to professionalize the offer.

Institutionally, the Georgian National Tourism Administration (GNTA), National Wine Agency, and the Georgian Gastronomy Association anchor policy implementation, marketing, appellation control, and events/festivals. In addition, the *Biological Farming Association Elkana* plays a pivotal role in integrating sustainable agriculture with gastronomy and wine tourism. Through its long-standing work on organic farming, agrotourism, and local food systems, Elkana has helped strengthen rural entrepreneurship and enhance the sustainability of Georgia's gastronomic offer. Supported by EU and donor-funded initiatives,



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Elkana bridges agricultural development with tourism innovation, ensuring that community-based and environmentally responsible practices become central to the country's gastro-tourism strategy.

International cooperation (EU cross-border programs, UNWTO, World Bank, EBRD) complements these roles with technical assistance, standards design, and investment in destination capabilities, positioning Georgia to align with European quality expectations while retaining its heritage-led distinctiveness.

Taken together, the academic and grey record points to a clear implementation pathway for cooperation projects: (1) upgrade experiences from tasting to multi-sensory, story-rich products (qvevri, supra, farm-to-table) with basic quality standards; (2) professionalize human capital via short, stackable training in service, wine interpretation, languages, and digital commerce; (3) strengthen route governance and booking/CRM infrastructure so micro-operators can plug into international demand; and (4) embed sustainability (local sourcing, waste reduction) as a value signal alongside authenticity. This synthesis underscores that Georgia's authenticity is a competitive asset, but its full conversion into economic value hinges on coordinated skills, systems, and support structures.

3.4 Cross-Cutting Themes and Relevance

The academic and grey literature reviewed across Europe, South Africa, and Georgia highlights several cross-cutting themes that converge on the central challenges and opportunities of gastronomy tourism. While contexts differ in institutional maturity, resources, and policy priorities, the evidence points to a set of shared needs and innovation pathways that are directly relevant for European cooperation projects.

Skills and training deficits represent the most consistent theme. Across regions, SMEs face shortages in qualified culinary professionals, sommeliers, service staff, and digital marketers. In South Africa, the 2017 Tourism Skills Audit and subsequent SADC assessments underline weaknesses in practical, work-based learning and an overemphasis on theoretical training. Georgia's post-COVID skills analysis identifies similar challenges, particularly in foreign languages, customer service, and wine interpretation. Europe, while comparatively advanced, continues to face gaps in digital competences, storytelling, and entrepreneurship, as reported by NTG Alliance studies. These findings point to a global training mismatch that constrains SME competitiveness and limits the scaling of innovative business models.

Another cross-cutting theme is the shift toward experience-centric business models. Literature from all three contexts documents a movement away from transactional models (wine tastings, restaurant meals) toward interactive, story-driven experiences (e.g., vineyard safaris in South Africa, qvevri winemaking in Georgia, hybrid physical-digital formats in Europe). This reflects broader experience economy theory, where value is co-created through immersion, authenticity, and memory-making. The academic consensus is that these models increase willingness-to-pay, length of stay, and post-visit loyalty, yet they also require new skills, infrastructures, and cooperative support systems.

Digitalization and hybridization constitute another common thread. Evidence from Europe (virtual tastings, online subscriptions), South Africa (digital marketing uptake during COVID-19), and Georgia (EBRD-supported SME upskilling) shows how the pandemic accelerated adoption of digital tools. However, many SMEs still lack the competence to sustain hybrid models, highlighting the need for tailored training in e-commerce, CRM, and data-driven marketing.

The literature also stresses the transversal relevance of sustainability and inclusion. European initiatives like Slow Food Travel and Iter Vitis foreground sustainability as a differentiating value, while South African policy explicitly links gastronomy tourism with empowerment of black-owned wineries and



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township cuisine. Georgia, meanwhile, positions authenticity and heritage conservation (qvevri, supra feasts) as its distinctive offer. Despite differences in emphasis, all three cases underline the role of gastronomy tourism in advancing the SDGs, through local sourcing, food-waste reduction, community inclusion, and cultural preservation.

For European projects, these cross-cutting themes translate into actionable priorities:

- Designing modular, work-based training programs that respond to industry skill gaps and strengthen SME competitiveness.
- Promoting business model innovation by supporting SMEs in transitioning to hybrid and experience-centric formats.
- Strengthening support structures and networks that enable fragmented producers to cooperate and scale.

Embedding sustainability and inclusivity as non-negotiable standards, aligning gastronomy tourism with wider EU and global policy agendas.

3.5 Neuromarketing and Gastronomy Tourism Innovation

The application of neuromarketing and consumer neuroscience to gastronomy tourism represents a growing frontier in understanding and enhancing visitor experiences. Neuromarketing integrates neuroscience, psychology, and marketing to explore unconscious processes, such as attention, emotion, and memory, that influence decision-making. In gastronomic tourism, where multisensory and emotional engagement are central to value creation, these tools provide crucial insights that traditional surveys or interviews cannot capture.

3.5.1 Foundations and Relevance

Conventional consumer research in gastronomy has relied heavily on self-reported methods such as interviews or questionnaires. However, neuromarketing introduces physiological measures, eye tracking, electroencephalography (EEG), galvanic skin response (GSR), and facial emotion recognition, to objectively assess how individuals react to stimuli such as food presentation, ambient design, or chef interaction.

Mengual-Recuerda et al. (2020) demonstrated that in haute cuisine contexts, the chef's presence and dish presentation significantly increased emotional arousal and memory retention among diners. Similarly, Berčík et al. (2021) showed that visual presentation alone can alter emotional engagement and perceived taste, emphasizing how cognitive and sensory stimuli jointly shape culinary satisfaction. These findings underline the core premise of gastronomy tourism: visitors do not merely consume food, they consume meaning, place, and emotion. Neuromarketing enables researchers and practitioners to identify which elements of that experience most effectively generate attention, pleasure, and memorability.

3.5.2 Practical Applications in Gastronomic Tourism

Dish Design and Presentation: Studies in fine dining contexts (Mengual-Recuerda et al., 2020) reveal that emotional intensity peaks when chefs personally present dishes, and gradually declines as the meal progresses—suggesting that restaurants and culinary tour operators should design emotional peaks throughout the experience to sustain engagement.



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Multisensory Environments: Research by Sadikzade (2024) confirms that environmental factors such as music tempo, lighting, and color can influence taste perception and emotional response. This has direct implications for wine routes, tasting rooms, or themed restaurants seeking to create distinctive, multisensory atmospheres.

Memory, Loyalty, and Willingness to Pay: Casiraghi et al. (2025) found that the “tasting phase” of eating experiences triggers the strongest emotional and cognitive activation, shaping memory and post-visit willingness to pay. In tourism terms, this reinforces the role of emotionally rich moments as predictors of satisfaction, loyalty, and positive word-of-mouth.

3.5.3 Regional Implications

Europe: In mature destinations facing high competition, neuromarketing can support differentiation by revealing which sensory and narrative cues most effectively drive engagement. Wine routes and culinary festivals can use these findings to design experience journeys with calibrated emotional trajectories.

South Africa: Given the country’s emphasis on inclusivity and cultural storytelling (e.g., township cuisine or heritage wine tours), neuromarketing can help assess tourists’ emotional perception of authenticity and optimize interpretive narratives to enhance empathy and connection.

Georgia: For emerging destinations that rely on heritage and authenticity (e.g. qvevri winemaking, supra feasts), neuromarketing can measure how visitors emotionally respond to cultural elements, helping refine visitor experience design and international branding strategies.

3.5.4 Capacity-Building and Innovation Potential

Neuromarketing’s value lies not only in research, but also in training and SME innovation. Integrating emotional analytics into vocational education could help small enterprises understand how sensory cues, storytelling, and digital content affect visitor emotions and decisions.

Key recommendations include:

Basic neuromarketing literacy: SMEs should learn to interpret emotional data (eye-tracking heat maps, facial expressions) to improve product presentation, rather than viewing neuromarketing as purely technological.

Hybrid methodologies: The most robust studies combine biometric data (EEG, GSR, eye-tracking) with qualitative interviews, ensuring that unconscious responses are contextualized through narrative meaning (Berčík et al., 2021).

Designing emotional peaks: As demonstrated by Mengual-Recuerda et al., emotional intensity tends to fade midway through experiences; structuring the visitor journey to include surprise or climax moments can sustain engagement until the end.

Digital integration: Neuromarketing insights should inform digital storytelling—testing which images, colors, or videos evoke stronger emotional responses in online campaigns. Krabokoukis (2025) proposes combining neuromarketing with data analytics to develop adaptive digital marketing frameworks for destinations.

3.5.5 Synthesis

Neuromarketing bridges science and storytelling by quantifying the emotional and sensory dimensions that



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define memorable gastronomic experiences. For destinations across Europe, South Africa, and Georgia, it offers evidence-based methods to enhance authenticity, engagement, and competitiveness. By aligning neuromarketing with ongoing priorities; digitalization, sustainability, and inclusivity, gastronomy tourism can evolve into a more emotionally intelligent and experientially optimized sector. Ultimately, measuring what visitors feel, not just what they say, unlocks new pathways for designing experiences that are both authentic and unforgettable.

4. Media Narratives and Data Evidence: Measuring Visibility and Impact

This section explores how specialized press coverage and data portals contribute to shaping the perception and evidence base of gastronomy and wine tourism. Media outlets such as *National Geographic*, *Condé Nast Traveler*, and *CapeTown ETC* play a key role in promoting destinations and translating policy objectives into compelling narratives of authenticity, sustainability, and innovation. Meanwhile, statistical and benchmarking platforms, including UNWTO, Eurostat, WTTC, SAWIS, and GNTA, provide the quantitative grounding needed for policy evaluation and impact measurement. The section concludes by identifying how these sources can inform European cooperation projects, ensuring that gastronomy tourism development is both visible and evidence-driven.

4.1. Europe & International

Specialized press and international data portals provide complementary insights into the dynamics of gastronomy and wine tourism in Europe and beyond. While policy documents and academic studies frame the sector's strategic importance, media coverage and statistical platforms help translate these narratives into public perception and measurable evidence.

International media outlets such as *National Geographic*, *Condé Nast Traveler*, and *Travel + Leisure* have played an influential role in positioning gastronomy tourism as a driver of cultural discovery and sustainable travel. Coverage of Mediterranean food routes, rural wine clusters in Spain, or culinary capitals like Lyon or San Sebastián has reinforced the idea of Europe as the global benchmark for food-based travel. These narratives not only shape international demand but also provide visibility for smaller destinations experimenting with innovative business models, such as Slow Food itineraries in Italy or organic wine clusters in Austria. By framing gastronomy as an authentic and immersive experience, international media amplifies the messages of policy frameworks and industry associations.

Data portals reinforce this narrative with quantitative evidence. The UNWTO Tourism Data Dashboard and Eurostat cultural tourism statistics track macro-level indicators such as arrivals, expenditure, and participation in cultural and culinary activities. OECD datasets further highlight the contribution of niche tourism segments, including food and wine, to rural development and SME competitiveness. These data sources are particularly valuable in filling the evidence gap, as gastronomy tourism is rarely measured as a standalone category; instead, it is often captured through proxies such as food expenditure shares or participation in cultural visits.

Complementary sources such as the World Bank Open Data and the WTTC Economic Impact reports allow



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for cross-regional benchmarking of tourism's contribution to GDP and employment. For example, WTTC analysis shows that in Europe, food and beverage consistently represent one of the largest categories of visitor expenditure, underlining its economic significance. These portals thus provide a baseline for evaluating the effectiveness of gastronomy tourism interventions, as well as a means of comparison with South Africa and Georgia.

The role of benchmarking platforms should also be noted. Initiatives such as the Global Wine Capitals Network publish visitor statistics and best practices, offering comparative insights into how destinations integrate wine tourism with gastronomy, culture, and sustainability. Consulting firms (e.g., Grand View Research, UnivDatos) complement this by forecasting global wine tourism growth and situating Europe as the world's largest market, with over 50% of global share by value. Together, these sources help quantify trends described qualitatively by media outlets.

For European cooperation projects, specialized press and data portals serve two essential functions. On one hand, international media helps shape demand and promote visibility for destinations, creating narratives of authenticity, sustainability, and innovation that can be strategically leveraged by SMEs and regions. On the other hand, statistical and benchmarking platforms provide the evidence base to justify interventions, design KPIs, and measure impact across partner regions. Integrating both dimensions, narrative visibility and statistical grounding, ensures that gastronomy tourism is not only perceived as attractive but also demonstrated as economically and socially impactful.

4.2 South Africa

Specialized press and data portals in South Africa offer valuable perspectives on the role of gastronomy and wine tourism in the country's economy, as well as the challenges and opportunities facing the sector. Beyond academic studies and policy frameworks, media outlets and statistical reports shape both domestic debates and international perceptions of South Africa as a food and wine destination.

Local press coverage frequently highlights the economic importance of wine tourism. Outlets such as CapeTown ETC and Bizcommunity have described wine tourism as "South Africa's hidden economic jackpot," citing figures of more than R9 billion in annual contribution to GDP and underscoring its potential to create jobs and sustain rural economies. These articles often reference official statistics from Vinpro, Wesgro, and the SA Wine Industry Information & Systems (SAWIS), amplifying the findings for broader audiences and policy stakeholders. They also stress the need for continued investment and innovation, warning that the sector remains under-leveraged compared to its potential.

Trade publications and industry magazines add nuance by emphasizing business model innovation and operational gaps. For example, the SubSahara Farmers Journal and EatOut highlight how wineries are transitioning from simple tastings to integrated, experience-rich offerings that combine food, wine, and cultural storytelling. They also identify a persistent weakness in customer relationship management (CRM), noting that few wineries systematically capture visitor data or nurture loyalty programs. These insights resonate with wider concerns about digitalization, inclusivity, and service quality across the tourism sector.

Data portals and industry reports provide the statistical backbone to these narratives. The 2022 South African Wine Tourism Visitor Research Report (Vinpro & Wesgro) segmented over 8,000 wine consumers, showing that 66% of wine tourists are domestic and that international demand is strongest from the UK, USA, and Germany. SAWIS further quantified the sector's contribution at R9.3 billion in 2022, representing 17.3% of total winery turnover and supporting 40,000 jobs. Micro-wineries were shown to be particularly dependent on tourism revenues, with up to 36% of turnover coming directly from visitors.



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At the macro level, the World Travel & Tourism Council (WTTC) Economic Impact Reports provide broader context, situating wine and culinary tourism within the overall contribution of tourism to South Africa's GDP and employment. By linking niche segments to national economic performance, WTTC data helps position gastronomy tourism as a legitimate policy priority rather than a peripheral product.

International media also plays a role in shaping perceptions. Travel + Leisure and Condé Nast Traveler frequently feature South Africa's Cape Winelands in their global rankings, emphasizing the unique blend of scenic landscapes, high-quality wines, and farm-to-fork dining experiences. This international coverage enhances destination branding, supporting South Africa's positioning as both an adventure and a gastronomic destination.

Taken together, the specialized press and data portals in South Africa illustrate a narrative of potential and transition. On the one hand, strong statistical evidence and widespread media coverage confirm the sector's substantial economic footprint and cultural appeal. On the other, recurring media commentary points to gaps in digitalization, inclusivity, and loyalty-building that need to be addressed for long-term competitiveness. For European cooperation projects, these insights underline the importance of supporting South African SMEs not only with marketing and international visibility, but also with digital tools, training, and inclusive value chain integration that can translate media narratives into sustainable economic outcomes.

4.3 Georgia

Specialized press and data portals play a decisive role in shaping the image of Georgia as an emerging gastronomy and wine tourism destination. While official strategies and donor projects establish the framework, media coverage and statistical evidence provide the visibility and credibility needed to attract both international visitors and investment.

National press outlets, including Georgia Today and the Georgian Journal, regularly highlight policy updates, donor-supported initiatives, and community success stories. Examples include features on family wine cellars upgraded with ENPARD grants, or reports on government ambitions to position Georgia as the "world's premier gastronomic destination by 2025." Such coverage brings attention to local entrepreneurs, while reinforcing the strategic importance of gastronomy in national branding.

International travel media has also played a catalytic role. Condé Nast Traveler (2021) named Georgia among the top destinations for "wine lovers and foodies," spotlighting Kakheti's wineries and Tbilisi's restaurant renaissance. National Geographic and Travel + Leisure have featured Georgian culinary traditions—such as khachapuri, supra feasts, and qvevri winemaking, framing them as authentic cultural practices that appeal to global audiences seeking immersive experiences. These narratives have contributed significantly to Georgia's growing reputation as a niche yet world-class gastronomic destination.

Data portals and institutional reports complement this media visibility with updated evidence. The *Statistical Review of Tourism in Georgia 2024* (GNTA, 2024) indicates that international tourist arrivals rose by 29% compared to 2022, confirming a solid post-pandemic recovery. Food and beverage activities remain the largest component of visitor expenditure, accounting for 28.3% of total spending, while participation in food and wine tasting experiences reached 77% of all international visitors. These recent figures reaffirm the centrality of gastronomy in Georgia's tourism offer and its growing contribution to local employment, regional development, and destination branding.

Donor-funded research further enriches the picture. The Black Sea CBC "Sea of Wine" project (2020–



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2023) provided comprehensive post-COVID insights, identifying infrastructure deficits in rural wine regions and recommending the diversification of products beyond tastings, through bundled gastronomy, cultural, and outdoor activities. This type of grey literature is often referenced by Georgian press, reinforcing the message that international cooperation remains central to overcoming structural challenges.

Collectively, specialized press and data portals illustrate a narrative of authenticity combined with modernization. On one hand, Georgia's qvevri winemaking (UNESCO Intangible Heritage), supra feasts, and farm-to-table restaurants offer unique storytelling assets. On the other, media and data consistently point to the need for improved infrastructure, professionalized service standards, and digitalization to meet international expectations.

For European cooperation projects, these sources are especially valuable. They demonstrate the strong demand base for Georgian food and wine experiences, while also evidencing the structural gaps that justify targeted interventions. Media coverage amplifies Georgia's image globally, while GNTA and donor data provide the baseline indicators necessary to design, monitor, and evaluate cooperation initiatives. Together, they position Georgia as a fertile partner country, authentic in its offer, ambitious in its strategy, and reliant on continued international collaboration to unlock its full potential.

4.4 Comparative Insights and Relevance

The review of specialized press and data portals across Europe, South Africa, and Georgia reveals both converging narratives and context-specific dynamics that shape gastronomy tourism. These sources, while less formal than policy or academic literature, are critical for understanding how destinations are perceived globally and how evidence is mobilized to justify investment and policy priorities.

Shared patterns are evident across all three regions. Media outlets consistently frame gastronomy tourism as a sector rich in authenticity, cultural heritage, and experiential value. Whether in Condé Nast Traveler highlighting Europe's culinary capitals, CapeTown ETC presenting wine tourism as South Africa's "hidden jackpot," or Georgia Today reporting on rural cellar upgrades, the press reinforces a narrative of gastronomy as both a competitive differentiator and an economic growth engine. This alignment demonstrates the communicative power of media in amplifying policy priorities and shaping consumer expectations.

Data portals across the three contexts provide the necessary quantitative grounding. Eurostat, UNWTO, and OECD supply macro-indicators on cultural and food tourism in Europe. SAWIS, Vinpro, and WTTC provide South African-specific insights on visitor profiles, spending, and GDP contribution. GNTA and World Bank datasets deliver comparable evidence for Georgia, documenting the dominance of food and beverage in tourist expenditure and the high participation rate in wine and culinary activities. Despite differences in scope and detail, these data portals collectively demonstrate the economic weight of gastronomy tourism and allow for cross-country benchmarking.

The differences lie mainly in emphasis and maturity. In Europe, the narrative is anchored in sustainability, innovation, and institutionalized benchmarking networks (e.g., Great Wine Capitals, Iter Vitis). South African press and data highlight inclusivity, transformation, and the role of wine tourism in balancing rural and urban development. Georgian outlets emphasize authenticity and cultural heritage, while donor-supported portals stress the urgency of infrastructure upgrades and skills professionalization. These contrasts illustrate how gastronomy tourism serves as both a mirror of national priorities and a vehicle for addressing structural challenges.

For European projects, the convergence of narratives and evidence has three key implications:



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- Leveraging media visibility – International and national media already promote gastronomy tourism as a high-value niche. European projects can amplify these narratives through coordinated storytelling, branding, and dissemination, ensuring that SMEs and regional destinations benefit from global attention.
- Grounding interventions in evidence – Data portals provide robust baselines to justify interventions and measure impact. Indicators such as visitor participation in gastronomy, F&B expenditure shares, or SME turnover reliance on tourism can be used as KPIs for project evaluation.
- Designing context-sensitive strategies – Media narratives and data evidence highlight different regional strengths: Europe’s institutional maturity, South Africa’s inclusivity agenda, and Georgia’s authenticity. Projects can align interventions with these strengths while addressing weaknesses (skills, digitalization, infrastructure).

Building on the international framework proposed by the UNWTO–Basque Culinary Center Guidelines (2019), this report recommends that participating destinations adopt gastronomy tourism strategies grounded in:

- Inclusive governance and stakeholder participation, ensuring alignment between public institutions, SMEs, and local communities;
- Capacity building and talent development, through vocational and higher-education partnerships;
- Innovation ecosystems, fostering product diversification, digitalization, and creativity; and
- Monitoring and evaluation systems, to track the socio-economic and environmental impacts of gastronomy tourism.

These elements collectively provide a roadmap for consolidating gastronomy tourism as a transformative pillar of sustainable destination development.

In conclusion, specialized press and data portals are indispensable complements to policy and academic literature. They both shape demand through compelling narratives and support policymaking with quantitative evidence. For European cooperation, they offer a dual advantage: visibility that raises the profile of gastronomy tourism internationally, and comparability that allows partners to design evidence-based, impact-driven interventions.

4.5. Executive Summary – GastroTourism in South Africa and Georgia

This report explores the state of gastronomic and wine tourism in Europe, South Africa, and Georgia, with a focus on innovation trends, business model development, support structures, and training needs. Drawing on official policies, industry reports, academic research, grey literature, specialized press, and data portals, the analysis highlights both the potential and the challenges of leveraging gastronomy as a driver of sustainable, inclusive, and competitive tourism.

1. Policy Frameworks

At the European level, the European Commission, UNWTO, and OECD emphasize gastronomy and wine tourism as key levers for rural revitalization, SME development, and cultural heritage preservation. Initiatives such as Interreg BASCIL provide toolkits for business model innovation, while IGCAT’s European Region of Gastronomy awards incentive regional creativity. South Africa integrates gastronomy



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tourism into its National Tourism Sector Strategy and Recovery Plan, highlighting empowerment of black-owned wineries, township cuisine, and skills training as priorities. Georgia's National Tourism Development Strategy places wine and culinary heritage at the center of its nation-branding, supported by GNTA, the National Wine Agency, and international donors (World Bank, EBRD, EU).

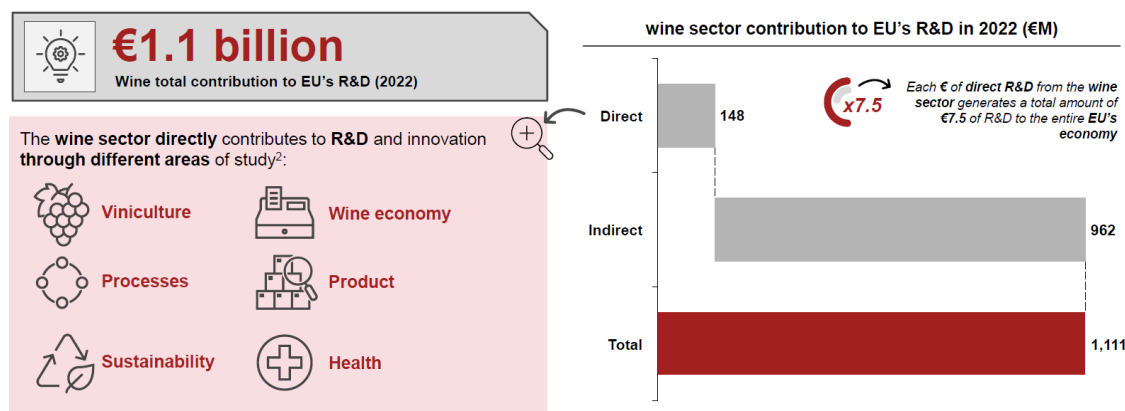
2. Sector and Industry Reports

European reports reveal the growth of hybrid business models, wine clubs, virtual tastings, and cultural itineraries, supported by sustainability certifications and heritage-based branding. South Africa's industry data (Vinpro, SAWIS) confirm wine tourism's R9.3 billion GDP contribution and its role as a lifeline for micro-wineries, while highlighting gaps in digitalization and CRM. Georgia's sector reports show strong demand, with 74-75% of visitors engaging in food/wine tasting, but stress persistent infrastructure and professionalization gaps. In all cases, the shift toward experiential, story-rich, and co-created models is evident.

3. Academic and Grey Literature

Academic studies underline gastronomy tourism's role in the experience economy and its potential to stimulate local economic development. Business Model Canvas is increasingly applied to culinary SMEs, showing diversification into new customer segments and channels. Grey literature reinforces the urgency of addressing skills gaps, from sommelier training and customer service in South Africa, to foreign languages and hospitality competences in Georgia, to digitalization deficits across Europe. Donor-supported initiatives provide partial solutions, but the literature stresses the need for modular, work-based, and practice-oriented training. Sustainability and inclusion emerge as transversal imperatives, linking gastronomy tourism to the SDGs.

Complementary evidence from PwC's *Economic, Social and Environmental Importance of the Wine Sector in the EU* (2024) further illustrates how innovation, research, and sustainability converge in Europe's gastronomic ecosystems. The study estimates that the EU wine sector contributes €1.1 billion annually to R&D, equivalent to 0.3% of the EU's total R&D investment, generating an economic multiplier of 7.5 times its direct contribution. This innovation activity is concentrated in six areas: *viniculture, processes, sustainability, product development, health, and wine economy*. These findings demonstrate how traditional gastronomic sectors are embedding technology and sustainability to maintain competitiveness, echoing the needs identified across South Africa and Georgia for greater digital and professional capacity-building. From an environmental perspective, the PwC report highlights the sector's tangible contribution to EU climate and biodiversity goals: vineyards help reduce soil erosion up to eightfold compared with traditional crops, host three times more plant species, and maintain an average flammability five times lower than cereal fields. Such data confirm that gastronomy-linked industries can serve as laboratories of sustainability, advancing circular practices, innovation ecosystems, and rural resilience across Europe.

Figure 3. Wine Sector R&D and Sustainability Contributions in the EU

Source: PwC (2024).

4. Specialized Press and Data Portals

Media outlets and data portals amplify these findings, shaping perceptions and providing measurable evidence. In Europe, Condé Nast Traveler and National Geographic reinforce the narrative of gastronomy as cultural capital, while UNWTO and Eurostat provide expenditure and participation data. South African media (e.g., CapeTown ETC) frame wine tourism as a “hidden economic jackpot,” while WTTC and SAWIS supply robust economic indicators. Georgian outlets (Georgia Today, Georgian Journal) highlight donor projects and local success stories, while GNTA and World Bank data document the economic significance of food and wine experiences. Together, press and portals ensure that gastronomy tourism is simultaneously visible, and evidence based.

Comparative Insights

Across all three contexts, common themes emerge:

- Business model innovation toward hybrid, experiential, and story-driven formats.
- Support structures (wine routes, incubators, donor-funded clusters) to overcome sector fragmentation.
- Skills development as the most pressing bottleneck, requiring new curricula and work-integrated approaches.
- Sustainability and inclusion as cross-cutting narratives that enhance legitimacy and market appeal.

The differences, however, are instructive: Europe leverages mature institutions and funding instruments; South Africa aligns gastronomy tourism with social transformation; Georgia emphasizes authenticity but relies heavily on international cooperation to overcome structural gaps.

Relevance for European Projects



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For EU-funded cooperation, these insights are highly actionable. Media narratives can be harnessed for branding and dissemination, while data portals provide KPIs for evaluation. Capacity-building can address shared skills gaps, while business model toolkits can be adapted to support SMEs across contexts. Sustainability and inclusion provide unifying themes that align with EU policy agendas such as the Green Deal and the SDGs.

In sum, gastronomy tourism emerges not as a peripheral niche but as a strategic sector capable of driving innovation, inclusivity, and resilience in tourism systems. For South Africa and Georgia, cooperation with European partners offers both access to tested models and opportunities to co-create solutions tailored to local needs. For Europe, engagement with these partners provides fresh perspectives on inclusiveness and authenticity, enriching its own policy and industry practices.

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