Marketing Wine in the Local HoReCa Channel: the Case of the CDO Conegliano-Valdobbiadene Prosecco

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The area where the production of the CDO (Controlled Designation of Origin) Conegliano-Valdobbiadene Prosecco takes place presents some features referring to the Marshallian District. One of them is the marketing of the main product within the local HoReCa channel (i.e. bars, restaurants, hotels and farm holidays enterprises).

The paper analyses the role of CDO Prosecco within the more broad wine consumption in the different HoReCa businesses, their CDO Prosecco supply and their ties with the district wineries, the promotional activities and the perspective of the CDO Prosecco in the local HoReCa. This analysis is based on a survey preformed by direct interview using specific questionnaires. A share of 25% of the whole HoReCa enterprises' population makes up the random sample, which accounts for 169 cases. In order to show the main differences among firms' types, sizes and course prices, we use both analysis of variance and contingency test, in relation to the kind of the variable.

The CDO Prosecco's consumption varies in term of number of references, which is particularly high in the restaurants and grows according to the average course price. Anyhow, the CDO Prosecco's role in the district HoReCa emerges mostly in term of its share on total wine consumption, which is 58% (from 71% in the farm holidays enterprises to 54% in the restaurants).

Sparkling type prevails on semi-sparkling and still types. Utilization as aperitif is still the main one, especially in the bars, but full-meal use and that with cakes and pies are increasing in the restaurants. Prices show a wide variability, with the highest values among the restaurants and the lowest among the bars. The top Prosecco (Cartizze) average price is double in relation to the average CDO Prosecco price. The preference for the CDO Prosecco is mainly due to its ties with the district land and the consumer's awareness of its higher quality compared with other Proseccos. Average number of brands per firm goes from 1.1 in the farm holydays enterprises to 6.0 in the restaurant, where it increases according to the price level. Concentration of sales is high in a single business, but quite low with regard to the whole district, given that a great number of brands (which are related to many local wineries) are sold.

The supply cost per CDO Prosecco bottle show a wide range, as well as the frequency of utilization of the different supply channel varies notably in relation with the characteristics of the outlet types.

The HoReCa channel is greatly implicated in many promotion activities, with emphasis especially on the Prosecco Wine Road. According to HoReCa's managers, exhibitions and gastronomic events are the foremost territory attractions that favour the CDO Prosecco consumption.

A discussion on the strengths and the weaknesses related to the CDO Prosecco consumption in the local HoReCa concludes the paper. Easiness (28%), versatility (27%) and lightness (26%) emerge as the main strengths, while price (29%) is the primary weakness, although 15% of the outlets regard it as strength. The scenario is substantially positive, with very good expectations for the Conegliano-Valdobbiadene Prosecco in the local HoReCa: consumption has increased at a rate higher than the other wines. Moreover, the survey has shown a strong integration level within the CDO Prosecco chain: wineries and district HoReCa businesses are together involved in promoting the wine and its territory.