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DEVELOPMENT IN VALE DOS  
VINHEDOS: AN ANALYSIS OF THE  
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# WINE TOURISM AND SUSTAINABLE TERRITORIAL DEVELOPMENT IN VALE DOS VINHEDOS: AN ANALYSIS OF THE DIFFERENT PERCEPTIONS AND CONFLICTS OF THE TERRITORY

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## ABSTRACT

Rural tourism has emerged as a tool capable of “reviving” and promoting rural areas, generating sufficient conditions to combat aspects such as poverty and rural exodus, through the generation of employment and income, appreciation of local products, among others. In this scenario, wine tourism also gains space, raised as a strategy to promote the territory and the wine sector. However, when not properly planned and coordinated, wine tourism can bring considerable negative impacts, especially to resident populations. Thus, the present work aimed to identify the role of wine tourism in the Sustainable Territorial Development of Vale dos Vinhedos, based on the analysis of territorial indicators and the perceptions of residents, entrepreneurs, and key actors in the territory. In view of this, the main contributions of wine tourism in the generation of socioeconomic benefits were observed, in the presence of its negative impacts, as well as the main conflicts manifested through the expansion of wine tourism practice in Vale dos Vinhedos.

**Keywords:** Community. Local development. Governance. Impacts

## INTRODUCTION

Despite the many concepts and definitions for the term wine tourism, it can be understood as the tourist practice to the attractions available in the grape and wine producing regions, where wine and the identity of the wine regions are the main motivating elements for visitors (Carlsen, 2004; Hall, 2004; Getz; Brown, 2006; Valduga, 2012; Falcade, 2016; Silva; Bruch; Bettencourt, 2022). Although it cannot be considered a recent activity, it was only in the last three decades that wine tourism emerged as a fundamental practice for wine territories, especially in the New World of Wine's countries such as Brazil, Uruguay, Chile, and Argentina.

In the Southern Region of Brazil, the evolution of the grape and wine business was based on the experience brought by Portuguese and Italian immigrants (mainly) from their countries of origin and the expression of their ability to adapt to adverse climatic and topographical conditions (Wilk; Fensterseifer, 2003). In this context, in 1990, Vale dos Vinhedos officially emerged, which was constituted as a wine cluster located at the meeting of the municipalities of Bento Gonçalves, Garibaldi and Monte Belo do Sul, all located in the Serra Gaúcha, in the state of Rio Grande do Sul (RS) (Aprovale, 2016; Azevedo *et al.*, 2019). The wines produced in the Vale dos Vinhedos are the only ones in Brazil to hold a Denomination of Origin (DO) and were also the first to receive the Indication of Origin (IO) seal (Brasil, 2022). Due to its pioneering spirit in the country, its important wineries, and the fact that it receives a large number of tourists throughout the year, Vale dos Vinhedos has established itself as a reference for Brazilian wine tourism (Medeiros; Lindner, 2018). Since then, several studies have been carried out in the region, focusing on its history (Valduga, 2012), culture (Zanini; Rocha, 2010; Medeiros; Lindner, 2018), gastronomy (Silva *et al.*, 2016), organization (Silva; Bruch; Bettencourt, 2022), visitation practices (Tonini; Levandoski, 2011; Bellé *et al.*, 2022) and affective image of tourists (Freire *et al.*, 2023). However, no studies were found that sought to understand the relationships between the practice of wine tourism and Sustainable Territorial Development (STD) from the perspective of local actors, especially residents.

In the context of the new wine-growing territories, Bernier *et al.* (2020) argue that wine has played a historical role in the development of rural regions, as can be seen in the cases of Mendoza, Argentina, Chile, Uruguay, and Brazil. In these territories, the marriage between wine and tourism has been gaining strength and new perspectives (Valduga; Valduga, 2016). For Durán-Sánchez *et al.* (2016),



wine and tourism can be a perfect symbiosis, where visitors can satisfy their knowledge needs and, at the same time, contribute to the economic development of rural areas. This symbiosis occurs based on the understanding that localities can take advantage of the potential, skills, capabilities, and competence of the individuals who make up their spaces to develop endogenously. It is assumed that places, regions, and spaces with tourist potential can develop based on strategies that aim to develop the local economy with the improvement of the population's quality of life through the optimization of their natural, historical, and cultural characteristics (Scótolo; Panosso Netto, 2015).

The growing interest in tourism development in rural areas is fueled by the need to “revive” rural communities (Priatmoko *et al.*, 2021; Wu; Loo; Chan, 2022; Lu; Qian, 2023). Tourism is a development factor because it enables job creation, contributes to the improvement of infrastructure in local communities, and allows for the revitalization of fragile economies in rural areas. The decline in economic activity in the rural world, the restructuring of the agricultural sector, the mechanization of agricultural production, migration to large centers, and the improvement of the population's educational levels, led to the adoption of tourism as a strategic alternative for economic development and regeneration of rural societies (Hall; Mitchell, 2000).

However, while tourism is considered a development option, some criticize it for mobilizing scarce revenues, not being balanced in the distribution of benefits, and causing social costs to residents, undermining the basic principles of development (Pina, 2009). For Xu *et al.* (2016), the existing literature on wine tourism reveals a scarcity of studies that assess residents' perceptions about wine tourism itineraries, which is incongruous with the fact that residents are the main stakeholders in the development of regional tourism. In this sense, Skinner (2000) argues that the success of a wine tourism destination depends on several factors, including the understanding of the needs of the local population and the commitment to their economic well-being, as well as an understanding of the carrying capacity of natural and cultural environments, among others. Furthermore, Salvatierra and Mar (2012) highlight that tourism projects focusing on local development must consider the individual and collective interests of the subjects, being based on endogenous strategies, assumed by the local community, since it is the local actors and their territory that must be developed to generate present and future benefits in a lasting way. Nevertheless, the literature suggests that the greater degree of residents' involvement with tourism contributes to the



greater perception of benefits arising from the activity (Maragh; Gursoy; Vieregge, 2015; Nguyen, 2022).

Based on the above, the present study aims to analyze the relationships established between the practice of wine tourism and the process of STD in Vale dos Vinhedos, based on the analysis of territorial indicators and from the perspective of local actors. Therefore, this work seeks to answer three research questions: (1) what are the main socioeconomic benefits and negative impacts generated by wine tourism? (2) what are the perceptions of the different local actors regarding the importance of wine tourism for local development? and (3) what are the main conflicts arising from wine tourism for the territory?

## METHODOLOGY

In general, the present research is characterized as a qualitative-quantitative case study. As for its character, the research is classified as descriptive. The choice of the case study for this research is justified because it is a contemporary social phenomenon' study that has been little studied – wine tourism. Regarding internal validity, Yin (2005) highlights that case studies are evaluated by the quality of theoretical articulation and adequacy between the analysis models and theoretical models used. As for external validity, there is no intention to enable statistical generalization, but the objective is to enable analytical generalization, through the expansion and creation of theories.

The research method used in this study is based on qualitative and quantitative approaches. The choice of the mixed method was due to the need to triangulate qualitative data - obtained through semi-structured interviews (with entrepreneurs, community and companies) - and quantitative data - obtained through socioeconomic, political-institutional, and territorial variables, collected through primary and secondary information from different sources (Morais; Neves, 2007).

Regarding quantitative data, variables considered fundamental in the analysis of the relationship between wine tourism/Sustainable Territorial Development in Vale dos Vinhedos were first chosen. Each group of variables or indices made up a specific analysis dimension (social, economic, political-institutional). According to Waquil *et al.* (2010), to analyze the development of a territory, multiple dimensions must be considered, each one composed of a wide set of variables, to capture the complexity and diversity of territorial development processes. Thus, the justification for choosing the variables in each dimension is the search for the characterization and distinction of the territory with a great wealth of information,



without, however, overlapping them in excess. To choose the variables analyzed in the present study, the System of Basic Tourist Indicators developed by the University of Buenos Aires (Sanchez, 2011) was used as a reference, as well as the methodology of the Sustainable Territorial Development Index (SDI) of the Instituto Interamericano de Cooperación para a Agricultura (IICA).

It is important to highlight that due to the difficulty in obtaining social indicators referring only to the territory studied, the variables of the municipalities that are part of Vale dos Vinhedos were used as references. In this sense, it was necessary to carry out some transformations, seeking greater specificity of the data. After the identification of the variable referring to each municipality that constitutes the territory of Vale dos Vinhedos (Bento Gonçalves, Garibaldi and Monte Belo do Sul), the variables referring to the studied territory were estimated, as shown in Table 1. This estimate was made based on the adaptation of IICA's SDI methodologies.

**Table 1** | Variables used in the analysis of STD indicators in Vale dos Vinhedos

Dimension	Variables analyzed	Data source	Reference year
Social	IDESE <sup>a</sup>	Foundation of Economics and Statistics Rio Grande do Sul (FEE)	2015
	IDEB <sup>b</sup>	AGENDA 2020 - INPE	2017
	Territory infant mortality rate	AGENDA 2020 - State Health Department of RS	2016
	Estimate the population residing in the territory	APROVALE	2019
Economic	The average number of employees in the territory's wine tourism sector	Field collection data	2019
	The flow of tourists/month from the territory	Field collection data	2019
	The average spending/tourist/month <sup>c</sup>	Field collection data	2019
	The number of associations representing the different sectors of the territory	Field collection data	2019
Political-institutional	Health units in the territory	Municipal Secretary of Health of the municipalities	2019
	The number of schools in the territory	Department of Education of the Municipalities	2019
	The number of police incidents/year in the territory	Special Operations Battalion of Tourist Areas (Secretary of Security of the State of RS)	2019
Territorial	Land use map	Authors' elaboration	2019



<sup>a</sup>IDESE (*Índice de Desenvolvimento Socioeconômico*) assesses the socioeconomic situation of municipalities in Rio Grande do Sul State (RS) in terms of education, income, and health, considering quantitative and qualitative aspects of the development process (FEE).

<sup>b</sup>IDEB (*Índice de Desenvolvimento da Educação Básica*) was created in 2007 and brings together, in a single indicator, the results of two equally important concepts for the quality of education: school flow and performance averages in evaluations. The IDEB is calculated from data on school approval, obtained from the School Census, and from the performance averages in the Basic Education Assessment System (SAEB) (INEP).

<sup>c</sup>Average expenses/tourist/month: It was estimated considering the amounts charged for the visitation fee, tasting fee, and average value of the meal in the territory. An average of three visits per tourist per day and a meal in Vale dos Vinhedos/tourist was considered, thus projecting the average expenses/tourist.

For better data accuracy, the aggregate indices of the territory were calculated through a weighted average, having as weight the percentage of the area belonging to each municipality. According to data from Aprovale (2016), Vale dos Vinhedos is located and distributed between the municipalities of Bento Gonçalves (60%), Garibaldi (33%) and Monte Belo do Sul (7%). Thus, the calculation was carried out using the following formula:

$$\text{Territory Index} = VB * 0.60 + VG * 0.33 + VM * 0.07$$

Where: VB: Variable relative to the municipality of Bento Gonçalves; VG: Variable related to the municipality of Garibaldi; VM: Variable related to the municipality of Monte Belo do Sul.

In the group of variables that made up the dimension of evaluation of the economic conditions of the territory, we opted for the analysis of indicators referring to the relationship between wine tourism and economic aspects, such as expenses/tourists; the number of employees in the wine tourism sector and flow of tourists, and this information was stipulated based on data collected through a questionnaire applied to 48 wine tourism enterprises associated with the Association of Fine Wine Producers of Vale dos Vinhedos (Aprovale). As for the evaluation of political-institutional indicators present in the territory, variables were used that demonstrate the basic actions of the public power and of the representative entities of the collectivity of the actors within the territory. Finally, seeking to analyze territorial aspects, a land-use map was built.

After collecting the variables and adjusting the data, the indicators of each dimension were analyzed, comparing them, when necessary, with the maximum and minimum values of each variable found in the Sierra Regional Development Council (COREDE Serra).



As a territorial indicator, the territory was analyzed from the perspective of land use and land conversation. For this purpose, land use and land cover map was constructed for the delimited area of the study. The land use and land cover map was performed using the free geoprocessing software Quantum Gis (QGIS), based on the visual classification, based on the classic elements of photointerpretation (Florenzano, 2007), of a satellite image available in the database of the program itself, from the year 2019. In addition, georeferenced polygons of the vineyards were used (Mello *et al.*, 2017) from the Viticultural Registry data collected by Embrapa Grape and Wine and made available to the authors by the Ministry of Agriculture, Livestock, and Supply and Embrapa. Field trips were carried out to clear up any doubts and collect coordinates of control points through GPS (Global Positional System) navigation.

As analysis classes, the uses of the territory were defined in: a) Vineyards; b) Built-up areas: encompassing rural, urban, and industrial constructions; c) Forest: forests and woods in general; d) Road System: paved and unpaved roads; e) Other Uses: other crops, pastures, exposed soil and other uses. After finishing the class vectorization process, topology rules were applied to make sure there was no inconsistency in the data. All data were projected to the UTM metric system for the area calculation performed by the same program.

Regarding qualitative data, these were collected through semi-structured interviews and questionnaires applied between October 2019 and February 2020. To ensure the achievement of the objective of identifying the actors' perception of the relationship between wine tourism and the Vale dos Vinhedos STD, three groups of key actors in the territory were selected: the Vale dos Vinhedos community; entrepreneurs associated with Aprovale; entities and public authorities operating in the territory. As for the sample, the three groups surveyed were composed of simple random sampling, considering aspects considered important to achieve the objective proposed by the present study, such as a criterion for location within the study area, among others (Table 2).



**Table 2** | Characterization of the sample surveyed in Vale dos Vinhedos

Group of key actors	Nº of respondents	Collection instrument	Selection criteria
Wine tourism ventures	48	Questionnaire (open and closed questions)	Location in the delimited study area Open to the public Activity related to viticulture or wine tourism
Community	30	Semi-structured interview	Resident in the territory Distributed among the main communities of Vale dos Vinhedos
Entities/Public Power	8	Semi-structured interview	They work directly in Vale dos Vinhedos – emphasis on tourism

For ethics to be ensured throughout the research, the requirements proposed by Resolution No. 510 (Brazil, 2016) were adopted: before applying the questionnaire or semi-structured interview, the objectives of the research were explained, and respondents and/or interviewees could object to participating in the research and/or stop at any time they did not feel comfortable. In addition, all participants had access to and signed the Informed Consent Form. This term is intended to support the respondent and grant the ethical terms of the research.

Regarding the choice of enterprises, in 2019 Aprovale had around 80 associated enterprises, approximately 70 of which worked directly or indirectly with wine tourism. Other enterprises, although associated, worked with products such as leather and handicrafts in general, were not considered for this research. Thus, the choice of projects took into account the following criteria: a) full operation during the period of research; b) direct or indirect involvement in wine tourism (wineries, restaurants, accommodation facilities, etc.). The 70 pre-selected companies were contacted by email, but only 18 companies responded. The other enterprises were visited directly by the main researcher, who explained the objectives of the research and invited them to participate. In total, 48 enterprises agreed to take part in the research. Upon acceptance, the questionnaire was sent by email or administered at the time of the visit.

Community members were selected using the snowball technique, where the formation of the sample takes place throughout the investigation process, and is not previously determined (Costa, 2018).

The technique begins with specifying the main characteristics that the sample must have. Next, a person is identified (in this case, a resident of Vale dos Vinhedos), the collection instrument is applied, and the participant is asked to indicate another person who is part of the same target population. This process continues until there is theoretical saturation, that is, when new information no longer appears in the collected data (Glaser; Strauss, 2006). The public and private entities participating in the research were chosen based on their involvement with wine tourism in Vale dos Vinhedos (citations on the Aprovale website; related news in electronic and printed newspapers). Both with community members and those responsible for public entities and/or agencies, an in-depth interview technique was used, using a semi-structured script, which allows for deep personal analyses to be revealed (Malhotra, 2019). The interviews were carried out individually and lasted approximately 20 minutes. All interviews were recorded for subsequent transcription.

After collecting the qualitative data, these were transcribed and tabulated and subsequently analyzed. For data organization and management, the Atlas.ti 8 program was used, and developed for qualitative data analysis. Thus, the data analysis project was first set up, that is, the transcribed data were grouped and categorized according to the research objectives. The categories mainly involved two large groups of analysis: perceived benefits; and the negative effects of wine tourism. Afterward, they were analyzed through coding, data exploration, and correlation matrices.

## RESULTS

Through the data and information collected through field research and secondary data made available by various entities in the public and private sphere, it was possible to verify important indicators regarding the STD of Vale dos Vinhedos, as well as the different perceptions of its actors regarding this process, as described in the following sections.

## INDICATORS

The indicators analyzed in the social, economic, political-institutional, and territorial dimensions can be seen in Table 3.



**Table 3 |** Analysis of indicators of the STD of Vale dos Vinhedos between the years 2015 and 2019

Indicator Category	Variables analyzed	Data	Reference year
Social	IDESE of the territory	0.829	2015
	IDEB of the territory	5.55	2017
	Infant mortality rate per 1,000 births	7.38	2016
	Estimate the population residing in the territory	700 families	2019
	Estimate of direct employees of the territory's wine tourism sector	136.5 employees	2019
Economic <sup>a</sup>	Estimate of tourist/monthly flow of the territory	≥ 20 thousand tourists/month	2019
	Estimated average expenses/tourist/monthly <sup>b</sup>	R\$ 145.00	2019
	Estimated monthly revenue	≥ 2,827,500.00	
	Number of associations representing the different sectors of the territory	16	2019
Political-institutional	Health units in the territory	1 basic health unit	2019
	Number of schools in the territory	1 elementary school	2019
	Number of police incidents/year in the territory	There are no occurrences <sup>c</sup>	2019
Territorial	Land use map	See Table 6 and Figure 2	2019

<sup>a</sup>The economic indicators refer only to the researched enterprises (Associated with Aprovale).

<sup>b</sup>For the calculation, only expenses with visitation/tasting fees and food were considered. For that, the average wine tasting fees, entrance fees, and average value of meals were considered - considering an average of three wineries visited per tourist/day and one meal per tourist/day. Expenses with the purchase of products were not considered.

<sup>c</sup>Refers to violent crimes, robberies, and thefts.

In relation to social indicators, when comparing the values of the variables analyzed in the territory with their values for the entire territory of COREDE Serra or even for the national and state levels, it is possible to perceive a regular result of the social sphere in Vale dos Vinhedos. That is, some indicators are above or equal to the desired levels, while others are lower (Table 4).

**Table 4** | Comparison between the social indicators of Vale dos Vinhedos and indicators of COREDE Serra and state level

Indicator	Valley of the Vineyards	Best Result CORE-DE Serra	Worst Result COREDE Serra	State average	National and/or state target
IDESE	0.829	0.879	0.757	0.751	-
IDEB	6.0	7.5	5.5	5.7	> 5.8
Child mortality rate	9.78	0.00	71.43	10.3	7
Rural population <sup>a</sup>	700 families	16,161 inhab.	860 inhab.	1.6 million inhab.	-

<sup>a</sup>As a reference for the best, worst, and state average, data from the 2010 Census were used.

IDESE aims to assess the socioeconomic situation of municipalities in Rio Grande do Sul in terms of education, income, and health, considering quantitative and qualitative aspects of the development process (FEE 2019). In this sense, Vale dos Vinhedos has an IDESE higher than the state average and very close to the best result of COREDE Serra, obtained by the municipality of Carlos Barbosa. In relation to IDEB for initial grades, the territory has an average of 6.0, above the state average and just above the national target limit (greater than 5.8). However, the territory's IDEB is closer to the worst result of COREDE Serra (Guabiju with 5.4) than to the best result, which is 7.5 in the municipality of Fagundes Varela. It is important to highlight that the municipality of Monte Belo do Sul, which makes up the territory of Vale dos Vinhedos, did not have its IDEB evaluated, as it did not meet the necessary requirements for the evaluation. What harmed the value of the aggregate IDEB of the territory, since analyzing the individual values of the municipalities of Bento Gonçalves and Garibaldi, both had IDEB higher than the national target, being 6.4 and 6.6 respectively.

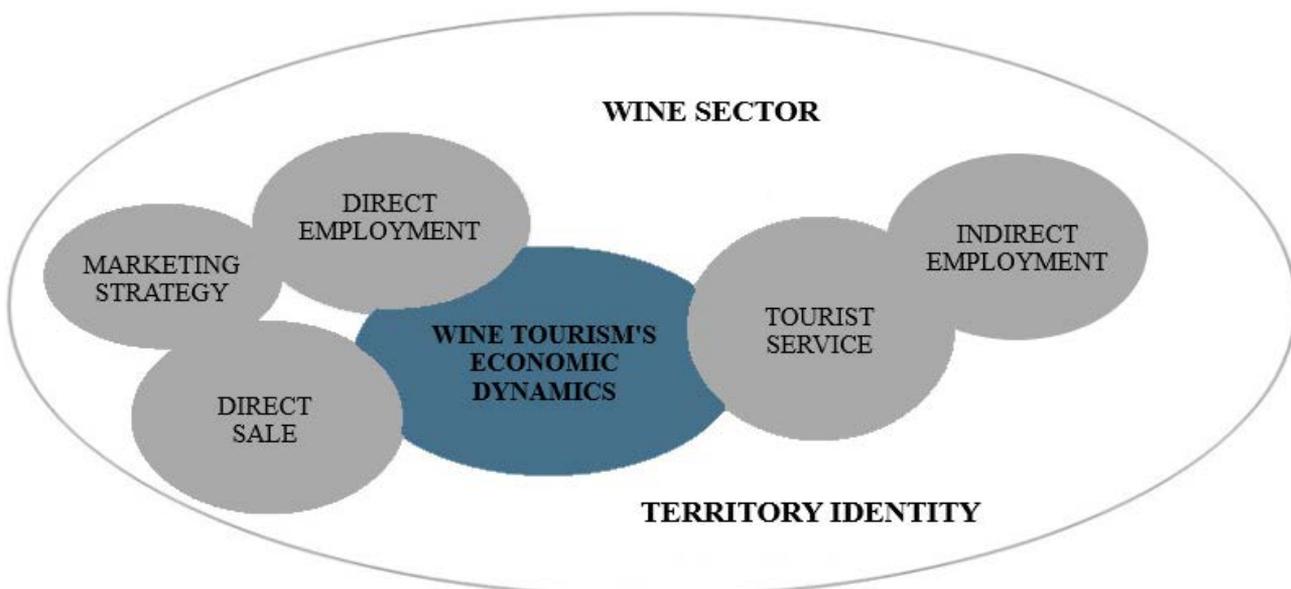
As for the infant mortality rate per thousand live births, the study territory was above the national target, which is 7 deaths/1,000 live births. However, the results for the territory were far from the worst results of COREDE Serra, and Monte Belo do Sul is in the group of municipalities where the infant mortality rate is equal to zero. It is worth noting that this group of municipalities in COREDE with a rate equal to zero corresponds to municipalities whose population is considerably small (not exceeding 3 thousand inhabitants), which may influence these rates. Regarding demographic data, there are no official data regarding the number of residents in the territory. However, Aprovale and the



Subprefecture of Vale dos Vinhedos estimate an average of 700 families distributed in 11 communities.

Regarding the indicators of the economic dimension, we opted for the evaluation of data collected in the field, together with the entrepreneurs associated with Aprovale. In this way, an attempt was made to estimate some data referring to the role of wine tourism in the economic dynamics of Vale dos Vinhedos (Figure 1). Considering that, officially, the data referring to tourism and the wine sector, mainly, are aggregated, in a way that makes it difficult to analyze the economic participation of wine tourism in the territory. In other words, it is extremely important to reinforce that the estimates of the economic indicators of wine tourism presented in this work are based on data provided by 48 enterprises (associated with Aprovale) and that, however, the territory has a much larger number of companies dedicated to wine tourism. Thus, it is not possible to attribute the results described below as a “rule” to the entire territory, but rather as an overview of the economic dynamics of the main establishments present in the “wine tourism heart” of Vale dos Vinhedos.

**Figure 1** | Dynamics of wine tourism in Vale dos Vinhedos



In this sense, according to the data reported by the surveyed entrepreneurs, only these establishments have an estimated total of 136.5 wine tourism attendants. In other words, employees who only perform functions related to serving tourists (direct employment). As for the monthly flow of tourists - not considering the variations in the flow in the busiest periods, when the number of tourists doubles - estimate a monthly average of more than 20 thousand tourists in the surveyed enterprises. We sought to estimate the flow of visitors to the Vale dos Vinhedos so as not to overestimate the data. The institutions responsible for the annual projection of tourists perform the same through an estimate based on the number of tourists served at the Tourist Service Center (CAT), which may at some point not correspond to the real values. For example, in 2019, 19,000 tourists were served at the CAT, with an estimated number of 443,764 tourists. However, it is a methodology of little precision.

When considering the empirical data described by entrepreneurs and entities representing the sector, there is a tendency for each tourist group to visit at least three wine-growing enterprises per day, in addition to having at least one meal in the enterprises of Vale dos Vinhedos. Considering such data and considering the average values of visitation, tasting and average price of meals charged by wine tourism establishments, it is estimated that each visitor and/or tourist spends at least an average of R\$ 145.00/day, generating a minimum monthly revenue of R\$ 2,827,500.00 for the establishments observed in this research. It is noteworthy that, for this estimate, the amounts spent on accommodation, tourism agencies, purchase of wines, agro-industrial products, and handicrafts, among others, were not considered.

As for the role of public authorities and institutions that represent the collective of Vale dos Vinhedos (tourist, wine sector, restaurants, hotels, residents, others), it was observed that, currently, the territory has nine entities of particular interest or public-private action that they represent in some way, directly or indirectly, the players in Vale dos Vinhedos. In addition, there are seven public institutions with different levels and performances in Vale dos Vinhedos (Table 5).



**Table 5 |** Frame of entities and/or institutions present in Vale dos Vinhedos

Entity (acronyms)	Status	Representative sphere
Northeast Mountain Tourism Association (ATUASERRA)	Active	Tourism sector – regional level
Association of Fine Wine Producers of Vale dos Vinhedos (APROVALE)	Active	Wine sector and wine tourism - territorial level
<i>Gaúcha</i> Association of Winemakers (AGAVI)	Active	Wine sector - state level
Community Association of Vale dos Vinhedos	Not active	Residents of Vale dos Vinhedos
International Organization of Vine and Wine (OIV)	Active	Wine sector and wine tourism – world level
Brazilian Union of Viticulture (UIVIBRA)	Active	Wine sector - national level
Brazilian Association of Enology (ABE)	Active	Wine Sector - national level
Union of Gastronomy, Accommodation, Bars, and Nightclubs of Caxias do Sul and Region (SEGH)	Active	Food sector - municipal level
Brazilian Wine Institute (IBRAVIN)	Not active	Wine sector and wine tourism – national level
Federal Institute of Rio Grande do Sul (IFRS)	Active	Research, Teaching, and Extension - regional level
Brazilian Agricultural Research Corporation (EMBRAPA – Uva e Vinho)	Active	Research and Extension - national level
Municipal Secretary of Tourism of Bento Gonçalves	Little Active	Public policies - municipal level
Municipal Secretary of Tourism of Garibaldi	Little Active	Public policies - municipal level
Municipal Secretary of Tourism of Monte Belo do Sul	Little Active	Public policies - municipal level
State Secretary of Tourism of Rio Grande do Sul	Little Active	Public policies - state level
University of Caxias do Sul (UCS)	Active	Research, Teaching, and Extension - regional level

Regarding the political-institutional action aimed at the residents of Vale dos Vinhedos, it is noticeable that in the scope of public security there is a greater investment of the public power for this territory. According to information from the 3rd Tourist Area Policing Battalion, in the last year, the territory did not record the occurrence of violent crimes, robberies, or thefts, due to the actions of ostensible policing and tactical planning, as well as the cooperation between residents, businessmen, and police, through community policing actions. As for the health area, community 15 of Graciema, which belongs

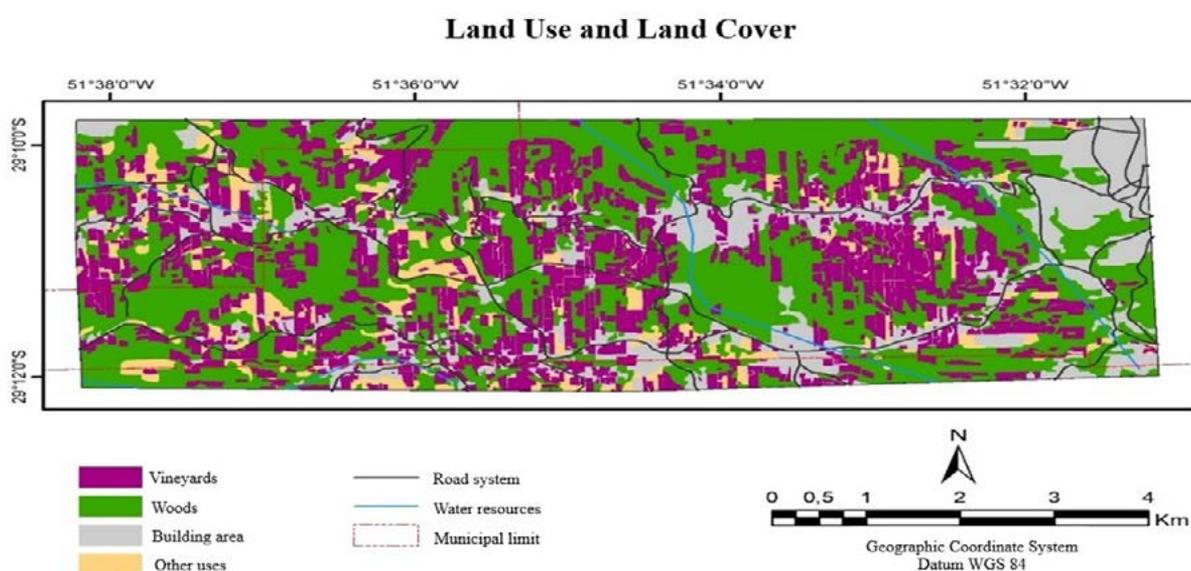
to the territorial area of Bento Gonçalves, has a Basic Health Unit (UBS). It is worth noting that all rural districts in the municipality of Bento Gonçalves have health units for the care of the rural population, which is not exclusive to Vale dos Vinhedos. As for education, Vale dos Vinhedos has a basic education school, EMEF Lóris Antônio Pasquali Reali, with approximately 150 students enrolled.

The results obtained regarding the use and coverage of the soil in the study area – the wine tourism area and rural area of Vale dos Vinhedos, demonstrated the predominance of the Mata class, which occupies an area of 2,185.54 hectares, which represents 45.11% of the area studied, as shown in Table 6 and Figure 2. The second class with the largest area is the vineyard class, occupying 1,442.41 hectares or 29.77% of the analyzed area, followed by the built area class, with 822.75 hectares, 16.98% of the total area. The road system and other land uses are less representatives, with 1.43% and 6.71%, respectively.

**Table 6** | Area of use and land cover of the wine tourism territory of Vale dos Vinhedos

Class	Area (hectares)	Percent (%)
Woods	2,185.54	45.11
Vineyards	1,442.41	29.77
Building area	822.75	16.98
Road system	69.51	1.43
Other uses	325.15	6.71
Total	4,845.36	100

**Figure 2** | Land use and land cover map of the Vale dos Vinhedos wine tourism area in 2019



## PERCEPTIONS ABOUT THE WINE TOURISM/TERRITORY/DEVELOPMENT RELATIONSHIP

To understand the perceptions about the relationship between wine tourism and the development of the territory of Vale dos Vinhedos, three groups of key actors in the territory were selected (Table 2): the community of Vale dos Vinhedos; entrepreneurs associated with Aprovale; and entities and public authorities operating in the territory. The main characteristics of the key actors participating in the research can be seen in Tables 7, 8 and 9.

**Tabela 7** | Socioeconomic profile of residents of Vale dos Vinhedos participating in the research

Socioeconomic Profile	Number of Respondents	Percent (%)
<b>Genre</b>		
Male	18	60%
Feminine	12	40%
Other	0	0%
<b>Age group</b>		
Up to 20 years	5	17%
Between 21 and 35 years	2	7%
Between 36 and 45 years	4	13%
Between 46 and 55 years	9	30%
Over 55 years	10	33%
<b>Education</b>		
Complete or incomplete elementary school	9	30%
Complete or incomplete high school	18	60%
Complete or incomplete higher education	3	10%
Postgraduate studies	0	0%
<b>Occupation</b>		
Farmer / Winegrower	8	27%
Student	4	13%
Salesclerk	4	13%
Businessperson	6	20%
Retired	3	10%
Other	5	17%
<b>Total</b>	<b>30</b>	<b>100%</b>

**Tabela 8 |** Main characteristics of the companies participating in the research

Characteristics	Number of Respondents	Percent (%)
<b>Size</b>		
Micro/Small	36	75%
Medium	8	16.66%
Big	4	8.33%
<b>Labor</b>		
Familiar	11	22.91%
Up to 5 employees	17	35.41%
More than 5 employees	20	41.66%
<b>Tour attendants</b>		
Up to 2 people	12	25%
3 to 5 people	25	52.08%
More than 5 people	11	22.91%
<b>Origin of hired labor</b>		
Municipalities of Vale dos Vinhedos	48	100%
Other regions of Rio Grande do Sul (RS)	0	0%
Other states in the country	0	0%
<b>Monthly average of tourists</b>		
Up to 100 people	2	4.16%
Between 100 and 500 people	14	29.16%
More than 500 people	32	66.66%
<b>Period of greatest influx of tourists</b>		
December/February	10	20.83%
March/May	0	0%
June/August	38	79.16%
September/October	0	0%
<b>Visitation fee</b>		
Doesn't charge fees	29	60.41%
Tasting fee only	17	35.41%
Visitation fee + tasting	0	0%
Visitation fee only	2	4.16%

**Tabela 9** | Main characteristics of the entities participating in the research

Characteristics	Number of Respondents
<b>Administrative sphere</b>	
Public	5
Private	3
<b>Occupation area</b>	
Research - Teaching - Extension	3
Planning - Organization - Management	3
Representation	2

Through interviews and questionnaires carried out with the main *players* in the territory of Vale dos Vinhedos, it was possible to identify indicators of their perceptions regarding three spheres of wine tourism and the relationship with the development of the territory: “evolution and importance of wine tourism in the territory’s development”; “main socioeconomic benefits and negative impacts generated by wine tourism”; and “main conflicts promoted by wine tourism”.

When asked about the evolution and importance of wine tourism in the territory’s development of Vale dos Vinhedos, 90% of the community members recognized the tourist practice as positive for the territory’s development, as well as all the entrepreneurs and entities surveyed. In general, the interviewees emphasize that wine tourism and its evolution are fundamental to the territory in terms of economic growth, generation of opportunities for residents and the wine sector, and visibility that is given to the territory.

Regarding the main socioeconomic benefits promoted by wine tourism, 27 of the 30 residents interviewed argue that wine tourism promotes benefits both to the rural community and to the tourism of the wine sector, citing direct and indirect benefits promoted to the local community. The three interviewees who report that the benefits are only “perceived” by entrepreneurs in the tourism and wine sector, are winegrowers and do not have any type of direct relationship with companies in the Valley. As for the entrepreneurs surveyed, 62% recognize that wine tourism can generate socioeconomic benefits both for the community and for enterprises in the sectors involved. Already 38% of entrepreneurs believe that wine tourism promotes benefits only to the tourist cluster and the wine sector. Regarding the perception of entities and public authorities, all respondents say that wine tourism generates benefits both for the

community and for entrepreneurs. However, representatives of research and collective representation entities point out that although the community benefits at some level from wine tourism, the main benefits promoted occur to entrepreneurs in the tourist and wine segments, requiring a lot of “effort” to identify these benefits generated to the community.

In general, all actors recognize that wine tourism can promote socioeconomic benefits for all stakeholders in Vale dos Vinhedos. Entrepreneurs, in addition to recognizing the benefits that are generated to the community, identify them, mainly, as essential to the wine sector. Among the benefits mentioned by the actors interviewed, the following can be mentioned: business opportunities, employment and income, recognition of the place and its products, and community self-esteem, among others.

Regarding the negative impacts caused by wine tourism, 83% of community members and 100% of representatives of entities and public authorities recognize that this practice generates negative impacts. Among the impacts most cited by residents are the flow of tourists, disruption of peace, price abuse, and exclusion of the community from participating in wine tourism. While entities and public authorities report the main negative aspects of wine tourism: the disorderly growth of service activities, such as food and accommodation; the problems of circulation and saturation of means of transport; the de-characterization of the wine-growing territory and changes in the landscape; urbanization; the concentration of power; the fragility in the networks of personal and commercial relationships; and the pressure for land and real estate speculation. Already 94% of entrepreneurs report that wine tourism does not promote negative impacts. The results on the main conflicts of wine tourism – real estate speculation and changes in the landscape – demonstrate that there are many perspectives under which these factors are observed. Regarding the changes in the community and in the landscape, 93% of the surveyed residents admit the changes as positive, relating them to progress, modernization, and as something necessary. Only two winegrowers reported being concerned about the changes brought about by wine tourism. Already 56% of entrepreneurs report that landscape changes are neutral. That is, they carry positive improvements, but also promote losses to the territory. For them, changes in the landscape are necessary because they please a large part of tourists, but they generate conflicts between entrepreneurs and public authorities, requiring the search for balance. While 19% see the changes as extremely positive, being synonymous with improvements in productive technology and in the available tourist offer. The other 25% see them



as something negative. For them, the changes may compromise the future of wine tourism in the Valley, as they represent a process of acculturation. It is important to highlight that this perception in relation to the landscape change is directly linked to the type of enterprise. Of the 25% who reported the changes as negative, only one belongs to the wine sector, while the others are directly linked to the tourist cluster.

Regarding real estate speculation, 46% of entrepreneurs believe that the overvaluation of land causes problems such as rural exodus, entry of investments not interesting to the sector, urbanization, and the generation of conflicts between entrepreneurs. Another 12% have an indifferent perception of the topic. Already 42% disagree with the others and believe that it is something interesting, as it values the territory, and brings business opportunities that value the territory, such as high luxury investments. Most of the community, 73%, believes that the valuation of the land is positive, as it offers alternatives to farmers who are no longer able to work in rural areas and values the properties in the Valley. Already 17% of residents believe that speculation is only good for a few, but that it can influence the emptying of Vale dos Vinhedos in terms of the local population.

In the case of entities and public authorities, most respondents believe that both changes and land and real estate speculation can result in significant future losses for Vale dos Vinhedos. However, representatives of public authorities at the municipal level, as well as the main representative entity of Vale do Vinhedos do not perceive the changes in the landscape and the economic overvaluation of the territory as something adverse and claim to be collaborating to alleviate these conflicts through actions and public policies.

## DISCUSSION

The results of the present work demonstrate that the territory of Vale dos Vinhedos, through viticulture and wine tourism, is in a position that is moving towards a process of Sustainable Territorial Development, although numerous conflicts are identified that can limit its full development. In this sense, it is extremely important to highlight that the analysis of indicators of the social, economic, and political-institutional dimensions, when observed individually, does not allow us to assess a process of totally ideal or anomalous territorial development, nor does it allow us to credit such development or stagnation as a consequence of wine tourism alone. Since the results obtained for most dimensions are compatible with



the general average of COREDE Serra, even for non-wine regions. However, when associated with the analysis of these indicators to the perceptions of the different social actors present in Vale dos Vinhedos, it is possible to point out more substantial indications of the conditions of the development process.

According to Flores and Medeiros (2016), although sometimes the positive impacts of tourism are overestimated, its potential for multiplier effects should not be underestimated, in the sense that wine tourism can be an important tool to promote a wine region while improving a support structure (such as accommodation, food, leisure, shopping, and entertainment) that can interact with other sectors of the territory. Wine tourism has the capacity to play a significant role in the STD, sustaining regional, economic and social foundations and taking care of environmental dimensions (Mitchell; Hall, 2000). The Campanha Gaúcha in Rio Grande do Sul, Brazil, has invested in wine tourism for the territorial development of the region. Bielinski and Troian (2020), interviewed representatives of wine producers and development agents in the region and observed that wine-growing enterprises have contributed to the generation of jobs and income, tax collection, training of local labor, in tourism of the region as a whole and, in projects with rural settlements and land appreciation. The authors comment that wine tourism also participates in generating income indirectly, creating environments for the sale of artisanal products such as sweets, jellies, and cakes. In addition, the enterprises studied, involved in wine tourism, have contributed to social, economic, and environmental strategies to promote the development of the territory.

For Darnay (2016), wine tourism has many faces, with different actors, a different understanding of spaces, the vineyard's work, a different investment capacity, and a greater or lesser interest in networking. These differences lead to business strategies and have ecological and aesthetic effects, even in vineyards, in social, cultural, tourist, and agricultural practices. In this sense, Xu *et al.* (2016), reinforce that the perception is directly linked to the social benefits identified by the actors and not by the sociodemographic attributes. According to the authors, among the main benefits perceived in studies that assess community perceptions in tourist regions are increased employment opportunities, improved quality of life for residents and cultural exchange between tourists and residents, as well as greater "community pride". Among the perceived negative impacts are the increase in the prices of goods and services, the increase in traffic congestion, and damage to the natural environment and landscape (Ko; Stewart, 2002; Gursoy; Rutherford, 2004).



This is perceived in our study, in general, all the actors surveyed (community, entrepreneurs, entities, and public authorities) understand wine tourism as a positive and important activity for the territory of Vale dos Vinhedos, although the identification of benefits and impacts the negative effects generated by the activity are directly linked to the role that each group of actors plays within the territory. While entrepreneurs more effectively recognize the economic benefits generated for the territory as a whole and do not recognize, for the most part, the negative impacts of wine tourism, residents discern - in addition to the economic aspects generated directly to residents, such as employment and opportunity of business, the sociocultural benefits promoted by wine tourism, such as self-esteem, and they admit the negative effects of the activity, such as abusive prices, disturbance of peace, a saturation of means of transport and exclusion of the community from the wine tourism development process.

The number of existing studies on the perceptions of residents in relation to tourism is extremely scarce, especially in relation to wine tourism (Poitras; Donald, 2006; Xu *et al.*, 2016; Vukovic *et al.*, 2019; Eusébio *et al.*, 2023), which makes it pertinent to fill this gap, considering the emergence of wine tourism around the world and its ability to promote economic development beyond local boundaries, but extend across cities, states and even countries. A better understanding of the attributes that influence residents' perceptions of wine tourism from a management perspective is also desirable, as resident support is critical to promoting tourism development and increasing community satisfaction (Stylidis; Woosnam; Tasci, 2021). Community stakeholders and policymakers can also use information about residents' perceptions to promote the sustainable development of local communities (Xu *et al.*, 2016).

According to Hall (2004), public policies emerge to legislate and implement guidelines for the development of a given region, and the absence or inefficiency of public policies that value and prioritize wine production can lead to the dismantling of the local culture related to winemaking. For Abreu *et al.* (2013), the role of the government in tourism is to coordinate the policy of the region, stimulating local development in joint actions with the private sector and the local community, which aims to organize tourist activity. Also, according to the authors, the Vale dos Vinhedos region has its own characteristics and peculiarities that should not be overlooked, and the development



of the region depends directly on the harmony between the public and private sectors, with an effective public policy, focused on the activity tourism and wine production. If these policies are not implemented properly, the Vale dos Vinhedos region's territory will be at risk, whether for the production, marketing, and consumption of the wine product or the preservation of the local landscape and cultural heritage. It is in this context of the absence or lack of more effective participation of the public power in the planning and organization of the territory of Vale dos Vinhedos (as mentioned many times by the researched entities) that the conflicts about the change of the landscape emerge - caused by the intensive diversification of enterprises and technological changes - and the strength of real estate speculation, brought about by the overvaluation of land in the Vale.

For Landel (2004) the dialectic of heritage can be intensified from the use made of it, such as tourism, for example, which can become a relationship that is not always harmonious due to the different territorialities that occur in the tourist place and the different types of relationships between tourism and territory in the touristification process. According to Elías (2008) wine tourism is a tool for enhancing the wine heritage and the preservation of the vineyard's cultural landscapes is a *sine qua non condition* for promoting the activity. However, this does not seem to be the perception of residents, entrepreneurs, public authorities and even the entity that represents a large part of the projects in Vale dos Vinhedos, since most of them report the changes in the landscape as a positive or neutral factor, without negative interference in the development of the territory. These results corroborate the findings of Song, Zhu and Fong (2021) who observed that residents value the fact that tourism helps to preserve local natural resources, suggesting improvements in public space such as acquisition of equipment, street appearance and availability of green spaces. On the other hand, Eusébio *et al.* (2023) observed that, even though wine tourism is based on natural resources, the environmental dimension seems to be less relevant for residents.

In this scenario, when analyzing the configuration of the current territorial dynamics of Vale dos Vinhedos, through the identification of land use and conservation, a process of urban pressure on the territory stands out, especially in the areas closest to the urban center of Bento Gonçalves and along the paved road system, as shown in the built-up area class of the Land Use and Conservation Map (Figure 3). The same was noticed by Viel *et al.* (2019) to identify land use and conservation in



the area of designation of origin (DO) of Vale dos Vinhedos, in 2016. But this is not a new process, Falcade (2016) in mapping land use in the territory of the Indication of Origin Vale dos Vinhedos (IOVV), in 2005, also visualized this urban pressure. According to the author, what stands out in the territory of Vale dos Vinhedos during the study period is the expansion of occupation with urban characteristics over the territory, not only in the urban fringe of the city of Bento Gonçalves but also along municipal roads.

Another indicator of the process of expansion of built-up areas is a large amount of exposed soil, observed in the category of other land uses and visualized in the field. This aspect evidences a process of increasing the preparation of areas for agricultural cultivation or for the preparation of areas for the construction of infrastructures for urban, rural, or industrial use, such as residences, wineries, or wine tourism enterprises, as also reported by Viel *et al.* (2019). It is worth noting that when analyzing the residents' perception of wine tourism in Vale dos Vinhedos, they highlighted the inconvenience caused by the excess construction and works in the territory, which indicates the possibility of a closer relationship between the exposed soil and the preparation for works, not for agricultural cultivation.

This process of expansion of the built-up areas within the territory of Vale dos Vinhedos demonstrates a direct relationship with the recognition of local viticulture and the intensification of wine tourism, which promotes an appreciation of the territory that is beneficial only to a portion of the society of Vale dos Vinhedos. According to Abreu *et al.* (2013), the same wine tourism that on the one hand brings growth and development to the region, on the other hand also excludes the population, that is, deprives residents of the enjoyment of development results, through their forced eviction because of the real estate speculation. For Valduga (2012), the organizational culture that provoked a whole process of productive specialization, the foundation of Aprovale, and the achievement of the Indication of Origin (IO) certification, was the same that, in the process of structuring and developing wine tourism, excluded the local population. This generated the sale of some properties due to the existing real estate speculation resulting from the lack of planning. According to Gastal (2017), in an interview with the newspaper O Pioneiro, at one end of the valley there is a process of "favelization", and at another entrance, the occupation is more elite.



Despite the constant discussions about these conflicts, the process of land valorization is not a cause for concern for most of the community. On the contrary, many of the residents are satisfied with the real increase in property values, since many no longer have physical working conditions, labor is scarce, and rural exodus is the only or the best option. For Falcade (2017), the increase in land value, which, in combination with the urbanization pressure of nearby municipalities and the aging of the rural population, opens space for real estate speculation.

Finally, the presence of wine tourism in Vale dos Vinhedos, in general, has promoted the prosperity of the territory, increasing the collection of monetary values, educational indices and valuing the local population's knowledge. The socioeconomic development generated by the activity of the enterprises has the potential to boost the generation of jobs in the territory. On the other hand, for there to be balanced territorial development, greater attention is needed from public authorities in relation to the increase in real estate speculation, in addition to special attention to changes in land use. For Paula (2004), government policies must promote direct actions in society, making territorial projects viable. In this sense, the predominantly positive perception of residents regarding wine tourism in Vale dos Vinhedos corroborates the greater engagement of the local population in the activity. Furthermore, the development process is not something that can be "finished", as market dynamics bring to light new markets and potential to be developed, not to mention the changing needs of the local community (Bielinski; Troian, 2020).

## CONCLUSIONS

In general, it is observed that the territory of Vale dos Vinhedos shows itself as a recognized rural wine-growing territory, capable of generating income and employment, business opportunities, promoting pride and self-esteem to its resident population, and presenting satisfactory conditions of education, health, safety, employability, and basic infrastructure. However, the limits to the Vale dos Vinhedos STD seem to be based on a limited awareness of the preservation of local identity. It is in this context that the conflicts of the de-characterization of the Vale do Vinhedos grow through changes in the landscape and real estate speculation, phenomena that feed back into each other.



While, on the one hand, tourism values the territory's wine-growing aptitude, the growing tourist demand leads to constant innovations in supply. These innovations, which sometimes forget the essence that gave rise to the wine tourism territory, the viticulture, loaded with "*savoir faire*", history, and hedonism, making the territory at "the mercy of capital's interests". On the other hand, the ills that haunt several areas of Brazilian rural - the aging of the local population, the lack of family succession planning, and the pressures of urbanization - associated with the overvaluation of the territory by a portion of the urban population with high purchasing power, each increasingly demanding and willing to invest in high social representation (status) items, such as Vale dos Vinhedos, result in the perfect marriage between available land and the interest of real estate capital. At the other end of this triad, there is another perfect union. A population excluded from the endogenous development process, and sometimes satisfied with the local economic results, and an absent and disarticulated public power in the governance and planning of a territory that is the responsibility of three municipalities, with different interests and legislation, allow us to identify a large gap between the growth of Vale dos Vinhedos as a wine tourism territory and its development as a rural community.

As limitations of the present study, we can mention the difficulty in obtaining indicators referring to the territory and the misalignment of data between the tourism and wine sectors. Furthermore, it was not possible to work with all the enterprises associated with Aprovale. In this sense, it is recommended that future studies make greater efforts to increase the sample of enterprises studied, recommending not only enterprises associated with Aprovale, but also non-associated enterprises.

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