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Haute école de gestion
Genève

**What differences exist between Lavaux's perception
and its promoted image, and how can the promotion be
adjusted to ensure consistency and improve the
knowledge of the area?**

**Bachelor Project submitted for the degree of
Bachelor of Science HES in International Business Management**

by

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Declaration

This Bachelor Project is submitted as part of the final examination requirements of the Haute école de gestion de Genève, for the Bachelor of Science HES-SO in International Business Management.

The student accepts the terms of the confidentiality agreement if one has been signed. The use of any conclusions or recommendations made in the Bachelor Project, with no prejudice to their value, engages neither the responsibility of the author, nor the adviser to the Bachelor Project, nor the jury members nor the HEG.

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Geneva, 31st May 2019

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Executive Summary

Lavaux, the Swiss vineyard which has been part of the UNESCO World Heritage List since 2007, is renowned for its terrace vineyards, its traditions, its breath-taking views on the Geneva Lake, and its unique landscape configuration. The purpose of this report is to provide an in-depth analysis of the perception and behaviour of the public towards Lavaux, and to compare them with the promotion of the area.

The field research, which is based on a survey and interviews, aims at analysing the mental representation of the public, the places visited and activities performed, the wine-consumption habits and the public's UNESCO's definition. In parallel, the interviews of different economic actors in the vineyard allow a deep understanding of the promotion done for Lavaux.

The findings suggest that the public's perception and behaviour are aligned with the promotion of the area. Wine, landscape and UNESCO are shared values and are fully part of the promotion. Though, more implicit values, such as traditions, culture, local products are not enough highlighted. Also, no influence on Lavaux's wine consumption has happened after the UNESCO's nomination as far as the opinion of the public and of economic actors is concerned. Globally, the current strategy is relevant and adapts to the market needs to some extent.

In order to improve the efficiency of the promotion and fill the existing gaps, recommendations include four main dimensions that can be developed. Firstly, the traditions and local products should be fully part of the promotion strategy, through quality products, service and wide opening hours. Then, the visit of the vineyard in winter could be promoted, with the creation of events to attract visitors at that period of the year. Also, the creation of a Vine and Wine Museum would enable the education of visitors about the heritage, traditions and the cultural background, while being a family activity. Finally, the creation of a global image through branding could improve the consistency of the promotion strategy. The branding should be decided amongst the promotion actors and should represent a first image to attract visitors in the area. The individualities and diversity of the economic activity should be kept within the vineyard, as they are part of the richness of the area.

To summarize, unity and coordination amongst actors, the sustainability of traditions and heritage, the orientation towards preferred tourism and the promotion of experiences are key to the development of the promotion of Lavaux in the coming years.

Contents

Declaration.....	i
Acknowledgements.....	ii
Executive Summary	iii
Contents.....	iv
List of Tables	vi
List of Figures	vi
1. Introduction	1
2. Theoretical concepts.....	3
2.1 Perception	3
2.2 Promotion.....	5
2.2.1 <i>Branding</i>	<i>5</i>
2.2.2 <i>Promotion of wine tourism.....</i>	<i>6</i>
2.2.3 <i>Promotion of a UNESCO site.....</i>	<i>7</i>
2.3 Economics of common resources.....	7
3. Methodology	9
4. Demand side – Perception and behaviour.....	11
4.1 Data collection	11
4.2 Participants	11
4.3 Procedure.....	12
4.4 Perimeter	12
4.5 Perception analysis	12
4.5.1 <i>Data lemmatisation, semantic categorisation, translation</i>	<i>12</i>
4.5.2 <i>Data analysis</i>	<i>13</i>
4.5.3 <i>Polarity index</i>	<i>13</i>
4.5.4 <i>Results.....</i>	<i>13</i>
4.6 Wine consumption analysis.....	24
4.6.1 <i>Global results.....</i>	<i>24</i>
4.6.2 <i>Segmented results.....</i>	<i>24</i>
4.6.3 <i>Conclusion – Wine consumption analysis</i>	<i>27</i>
4.7 Analysis of the activities and places visited.....	28
4.7.1 <i>Data categorisation.....</i>	<i>28</i>
4.7.2 <i>Data analysis</i>	<i>28</i>
4.7.3 <i>Results.....</i>	<i>28</i>
4.7.4 <i>Geographical segmentation</i>	<i>28</i>
4.7.5 <i>Generational segmentation</i>	<i>30</i>
4.7.6 <i>Gender-based segmentation.....</i>	<i>34</i>
4.7.7 <i>Conclusion – Activities and places visited</i>	<i>35</i>
4.8 Analysis of the definition of UNESCO	35
4.8.1 <i>Data categorisation.....</i>	<i>35</i>
4.8.2 <i>Data analysis</i>	<i>36</i>
4.8.3 <i>Results.....</i>	<i>36</i>

4.9	Summary of the findings on the demand side	37
4.9.1	<i>Perception and places visited</i>	37
4.9.2	<i>Wine consumption</i>	38
4.9.3	<i>UNESCO definition</i>	39
5.	Supply side – Promotion	40
5.1	Data collection	40
5.2	Participants	40
5.3	Analysis	41
5.4	Results	42
5.4.1	<i>Promotion organisation</i>	42
5.4.2	<i>Offer</i>	43
5.4.3	<i>Targeting</i>	44
5.4.4	<i>Visitors' typology</i>	45
5.4.5	<i>Periods of visits</i>	46
5.4.6	<i>Promotion tools</i>	47
5.4.7	<i>Values</i>	49
5.4.8	<i>UNESCO impact</i>	50
5.4.9	<i>Areas for improvement</i>	50
5.5	Economic analysis	53
5.5.1	<i>Stakeholders' costs and benefits</i>	53
5.5.2	<i>Lavaux as a common resource</i>	55
6.	Comparison of demand and supply sides	58
6.1	Perception compared to promotion	58
6.1.1	<i>Western Switzerland inhabitants</i>	58
6.1.2	<i>Eastern Switzerland and abroad inhabitants</i>	58
6.1.3	<i>Generational</i>	58
6.1.4	<i>Gender-based</i>	59
6.1.5	<i>UNESCO definition</i>	59
6.1.6	<i>Comparison for all groups</i>	59
6.2	Wine consumption after UNESCO nomination	60
6.3	Visits compared to promotion	61
7.	Recommendations	62
7.1	The question of branding	64
8.	Conclusion	67
	Bibliography	69
	Appendix 1: Sample statistics	73
	Appendix 2: Lavaux perimeter	74
	Appendix 3: Online survey questions	76
	Appendix 4: Perception analysis data, steps and decisions	77
	Appendix 5: Frequency tables for perception	78
	Appendix 6: Wine consumption, visits and UNESCO data analysis decisions	83
	Appendix 7: Interviews synthesis	84
	Appendix 8: Interviews' participants	96

List of Tables

Table 1 Demand side's methodology - Summary	10
Table 2 UNESCO definition – Dimensions	36
Table 3 Summary of the perception and visits per segment	38
Table 4 Summary of the wine consumption analysis	39

List of Figures

Figure 1 Social representations	4
Figure 2 Perception of Lavaux, Lavaux Perimeter	13
Figure 3 Perception of Lavaux, Western Switzerland	15
Figure 4 Perception of Lavaux, Eastern Switzerland and abroad	16
Figure 5 Perception of Lavaux, Baby Boomers	18
Figure 6 Perception of Lavaux, Generation X	19
Figure 7 Perception of Lavaux, Generation Y	20
Figure 8 Perception of Lavaux, Generation Z	21
Figure 9 Perception of Lavaux, Women	23
Figure 10 Perception of Lavaux, Men	23
Figure 11 Consumption behaviour – Drink wine once a month	24
Figure 12 Consumption behaviour – Drink wine once a week	25
Figure 13 Consumption behaviour – Drink wine 3-4 times a week	26
Figure 14 Consumption behaviour – Drink wine daily	26
Figure 15 Consumption behaviour – Drink wine on special occasions	27
Figure 16 Places visited and activities frequency – Lavaux perimeter	29
Figure 17 Places visited and activities frequency – Western Switzerland	29
Figure 18 Places visited and activities frequency – Eastern Switzerland and abroad	30

Figure 19 Places visited and activities frequency – Baby Boomers	31
Figure 20 Places visited and activities frequency – Generation X	31
Figure 21 Places visited and activities frequency – Generation Y	32
Figure 22 Places visited and activities frequency – Generation Z	32
Figure 23 Places visited and activities frequency – Women	34
Figure 24 Places visited and activities frequency – Men	35
Figure 25 Promotion dimensions	41

1. Introduction

Switzerland is known for its landscape variety as well as for its quality products. In parallel, from an external point of view, Switzerland can also be perceived as expensive, being home for many banks, and its inhabitants as having a high purchasing power. Swiss wine, on its side, is not well-recognised internationally, while its quality is appreciated in the country. Several vineyards exist and each has its own identity: close to a lake, in the mountains, located in a specific area or using a unique production method.

Lavaux, located in Canton de Vaud, in Western Switzerland, is part of the Swiss vineyards. Lavaux's area extend between Lausanne and Vevey, two large cities of the canton, and is mainly composed of vines, which are part of its renown. Its ideal location, next to the Geneva Lake and in front of the Alps, allows to display breath-taking viewpoints, attracting tourists and walkers. The wine produced in Lavaux benefits from a unique landscape composition, with, what is called, "three suns": the direct sun, the sun reflecting on the lake, and the sun heating the hand-made stone walls. Also, the steep slope towards the lake is specific to Lavaux, leading to these diving views on the Geneva Lake. The steepness of the vineyard and its layout don't allow any machine to work in the vine, meaning that traditional methods, including grape-harvest by hand, are still used. White wine is mostly produced in the area, coming mainly from Chasselas.

Lavaux was nominated in the UNESCO World Heritage List in 2007, for the following reasons:

- Its traditions and heritage from the past
- Its unique landscape configuration
- Its harmony between people and environment

After the nomination, Lavaux gained in international recognition and became one of the recommended destinations in the country.

At the moment of writing, studies have been done by UNILavaux, a project team dedicated to analysing the evolution of Lavaux's landscape over time, ten years after the UNESCO nomination. As part of four different reports, UNILavaux researched and studied:

- The tourism behavior in Lavaux, including the length of stay, mobility, activities, wine purchase, satisfaction during "Cave Ouvertes", in order to provide with advice for future tourism practices (Céré, Kaiser, Reynard, 2017).

- The touristic offer in Lavaux, including accommodation, restaurants, activities, as well as the demand for accommodation (Clivaz, Reynard, 2017).
- The demographic, territorial, and socio-economic evolution of the area, including population, employment, households, agricultural activity, territory, activity (Clivaz, Bachmann, Reynard, Kaiser, 2016).

The last report published by UNILavaux groups several aspects mentioned before, including demographics, climate, geology, wine growth and crops (Bachmann, Clivaz, Kaiser, Reynard, 2016). This last report, published in 2016, mentions the lack of information regarding the status of wine tourism, as well as information regarding the site's perception. The report suggests that a study about the inhabitants' and visitors' perception should be established to deepen the research about the topic.

To fill the gaps of the existing research, this report will focus on two main dimensions, to compare them: the perception of the public and the promotion of the area. In order to enable the comparison of both dimensions, the demand side – meaning, the public - will be analysed first, including the public's mental representation of Lavaux, the habits in terms of wine consumption, the activities and visits in Lavaux and the UNESCO definition. Then, the supply side – meaning, the promotion – will be analysed according to promotional aspects relevant to the area. Finally, both sides will be compared to provide an analysis of the gaps and similarities between them, to formulate concrete recommendations to improve consistency in terms of values and centres of interest between the supply and the demand sides.

With the defined structure, the research question, “What differences exist between Lavaux's perception and its promoted image, and how can the promotion be adjusted to ensure consistency and improve the knowledge of the area?” will be answered. The perception and promotion will be analysed deeply and compared, to ensure the recommendations correspond to the field research.

2. Theoretical concepts

This chapter will detail the theoretical concepts used throughout this report. It will highlight the existing theory regarding the aspects studied in this research. Also, it will enable the accurate understanding during the reading of the analysis. Section 2.1 defines the perception, as well as describes the mental representation theory. Then, promotion is explained in its globality, before detailing the branding, wine tourism and UNESCO-specific aspects to consider. Finally, section 2.3 includes concepts of economics, in terms of public goods and externalities.

2.1 Perception

As defined by Solomon (2017 p.98), “*perception is the process by which people select, organize, interpret these sensations*”, sensations referring to the responses of the five senses to a stimulus. From that definition, perception is therefore associated to the exposure to something – a person, a place, an object, an image, for instance – and the mental process occurring after the exposure.

In the context of Lavaux, perception will be defined as the mental representation people have regarding the area. This mental representation can emerge from someone’s past experiences, from relatives’ storytelling, from imagination or from cultural aspects. Many factors are included in one’s perception and can be either conscious or unconscious: the sight of a picture, the hearing of a song, a personal experience in the place, or the socio-cultural influence, amongst others.

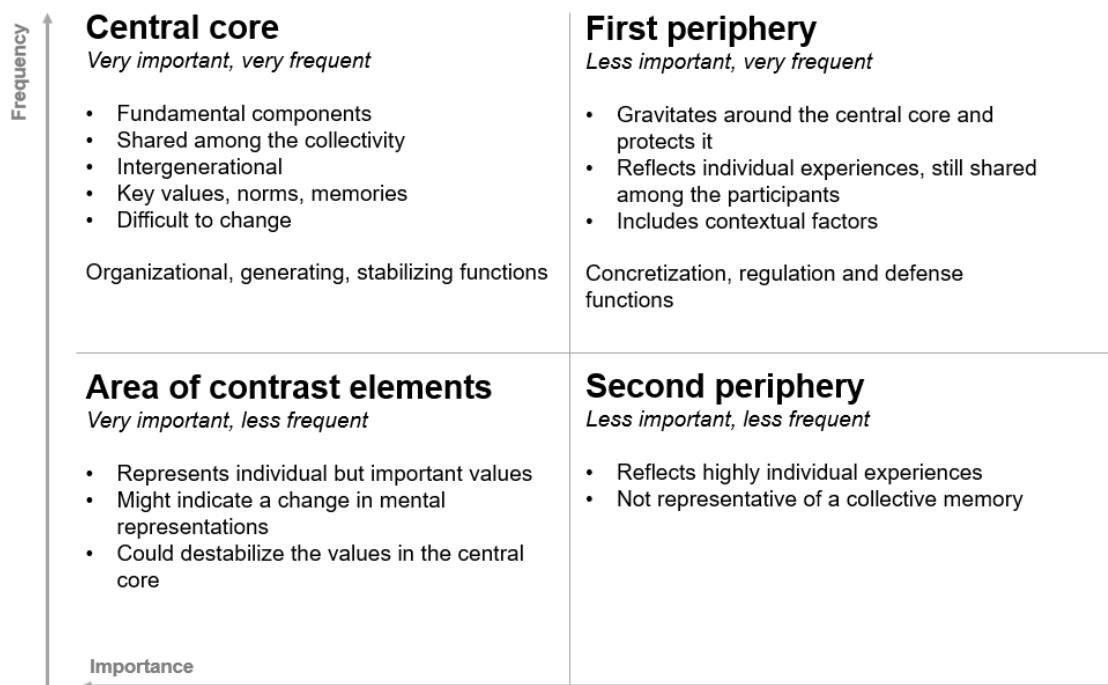
To analyse people’s perception, Rodrigues (2018) suggests the use of projective methods, which aim at retrieving feelings, beliefs, attitudes and motivations. With the use of a stimulus, participants’ express, sometimes unconsciously, their inner motivations, which they might have hidden with a direct question regarding their feelings, for instance.

Amongst other techniques, word association allows the participants to loud the words, thoughts and images about the topic. The answers form the sum of mental representations, allowing to establish, on the one hand, a collective reality based on social norms, values and memories and, on the other hand, to assess the influence of individual experiences and the context. To obtain this classification and analyse the data gathered in the word association, a lemmatisation needs to be performed, grouping words with the same root. For instance, beautiful and beauty can be grouped, as they have the same root. After the lemmatisation, a semantic categorisation is performed, by defining categories for words which belong to the same field. This step is based on the

researchers' choices, while being influenced as well by the frequency of word families obtained after the lemmatisation. Each semantic category is then assessed in terms of frequency and importance, to enable the application of the Central core theory, developed by Abric (1976).

As mentioned by Rodrigues, Ciela, Gómez-Corona, Silveira, Marchesan, Galmarini and Richards (2017 p.299), “a social representation is organized around the central core”. This central core is then completed with two peripheries, as well as the area of contrast elements. The meaning of each quadrant, defined by the same group of authors, as well as Minibas-Poussard (2003) and Rodrigues (2018), is summarised in the table below:

Figure 1 Social representations



As part of this method, the polarity index aims at measuring the attitude of people towards a topic, that can be either positive or negative. The polarity index is calculated as follow: $(\text{Number of positive words} - \text{Number of negative words}) / \text{Total number of words}$ (Rodrigues, Ciela, Gómez-Corona, Silveira, Marchesan, Galmarini and Richards, 2017 p.231).

Perception, therefore, is a powerful tool in the conception of promotion, that it be for products, services, or places.

2.2 Promotion

From a purely product or service marketing point of view, Kotler and Armstrong (2016 p.447) suggest that promotion includes the ways used to engage customers, to communicate values and to build relationships with them. They include five main dimensions in their promotion mix:

- Advertising
- Sales promotion
- Personal selling
- Public relations
- Direct and digital marketing

For this research, promotion will be addressed as a way to increase the knowledge of the area, leading to more visitors and, indirectly, increasing the revenue for the region. The five elements suggested by Kotler and Armstrong (2016 p.447) remain valid, even though they need to be observed from a tourism perspective, and not from a purely product and service point of view.

In their Encyclopedia of Sustainable Tourism, Cater, Garrod and Low (2015 p.142) highlight the importance of coordination in the marketing of a destination. The different actors, the partnerships and a collective vision are crucial to increase visibility (Buhalis 2000).

Based on the combination of the traditional promotion-mix and the specific tourism aspects, the advertising, the direct marketing, the partnerships, the collaboration and the offer will be analysed to provide a global view of the area's promotion.

2.2.1 Branding

Kotler and Armstrong (2016 p.263) define a brand as a "*name, term, sign, symbol, or design, [...] that identifies the products or services of one seller or a group of sellers and differentiates them from those of competitors*". A brand allows to build a powerful image to promote products or services to customers.

Cai, Gartner and Munar (2009 p.101) add precisions on the definition of branding for a touristic destination. Indeed, they underline the importance of the creation of a unique brand identity, while sustaining an image that is meaningful for the inhabitants and for the visitors. Emotions and experiences are entirely part of this process.

Having a unique symbol or image for a product, or, in the case of Lavaux, for a place or destination, can provide a powerful promotion tool. Not only does it allow a better

recognition locally and beyond the borders, it also enables consumers to link their perception with the image built, indirectly, through the promotion. The image can take many forms, as explained by Kotler and Armstrong (2016 p.263), encompassing several factors.

Branding is important to reach all generations. According to Danziger (2017), branding has a considerable impact towards the Millennials, especially. Due to the business of their lives, they want to recognise the products easily, linking it with something they know and appreciate, to orient their purchasing choices. In the same idea, brand loyalty and trust grow from direct relationships with the producers, in this case, wine makers. They are keen on experiences, wineries providing them with what they are looking for. Therefore, branding is crucial to build a long-term promotion strategy: on the one hand, it constitute a strong basis for any promotion campaign, and, on the other hand, it ensures the sustainability of the image and values over time. This last is of particular importance towards Millennials. Indeed, the sustainability of some values and their transmission to future generations impacts them directly.

2.2.2 Promotion of wine tourism

Due to its nature, Lavaux tends to be favourable to wine-related activities. Wine tourism can be described as the activities gravitating around the discovery of the wine, as mentioned by Observatoire Valaisan du Tourisme (2018). This includes the visit of cellars, wine tastings, but also the cultural aspects linked with the wine making sector. P-A. Morard, president of Swiss Wine Promotion, describes wine tourism as a “*state-of-mind*” (Observatoire Valaisan du Tourisme 2018). Over the last years, people tend to orient more towards nature and traditions, which increases the interest in wine tourism.

Observatoire Valaisan du Tourisme (2018) highlights some crucial aspects to reinforce wine tourism in Switzerland, aspects that are aligned with the basic theories of promotion:

- Transparency, as the consumers become more sensitive to the origin of the products.
- A structured offer and well-marketed activities, including digitalisation and internationalisation.
- Solid partnerships.

These three factors can be included in the definition of the promotion-mix, to provide a tailored basis for the analysis of the supply side.

2.2.3 Promotion of a UNESCO site

Another particularity of Lavaux, the UNESCO World Heritage nomination, must be considered when analysing the promotion of the site. Courvoisier and Aguilhaume (2001) conducted a study about the use of the UNESCO nomination as a territorial marketing tool. Their study, focusing on Lavaux and Les Montagnes Neuchâtelaises, two UNESCO sites in Switzerland, concluded that the UNESCO Heritage label is a relevant tool to promote Lavaux, economically and from a touristic perception. Though, they highlight that the process must be coordinated amongst the different political and economic actors in the area, with concrete actions, a common strategy and vision.

Interviewed by Courvoisier and Aguilhaume (2011), Emanuel Estoppey, Lavaux's site manager at the time of the study, underlined the effects of the unity created with the nomination as a World Heritage site, that it be effects on the wine production, with the AOC Lavaux, on the tourist offices or on some events renamed after Lavaux rather than individual names.

Also, sustainable development was already, in 2011, one of the dimensions worked on to ensure the preservation of the site. The impact of the increase in tourism needs to be controlled. As mentioned by Courvoisier and Aguilhaume (2011), two complex problematics need to be considered:

- The contrary interests between the protection of the site and the promotion of the attractiveness.
- The role of the stakeholders to ensure a sustainable growth of tourism and the protection of the heritage.

Therefore, the UNESCO recognition needs to be considered in the analysis of promotion, according to the identified dimensions.

2.3 Economics of common resources

Lavaux, due to its nature, can be considered as a common resource. From an economic point of view, common resources have two main characteristics:

- They are rival.
- They aren't excludable.

The first means that the use of the good by someone reduce or diminish the use of the good by someone else. The second describes the free of charge aspect of common resources¹.

Lavaux corresponds to both conditions: first, the overuse or misuse of the vineyard can diminish its value over time or cause irreversible degradations. Then, nobody, apart for legal reasons, can be forbidden to visit Lavaux and the visit of the vineyard itself is free of charge. The exclusion of the use of the resource by one isn't impossible but can be difficult. The economic activities in the area and the product sales have obviously a cost, but these activities and products are private goods.

Common resources can be faced with the issue of the free rider, which refers to a person benefiting from a good or service without paying for it. Free riding can concern the visitors, but also the interactions between the economic actors. Indeed, a promotion campaign from a specific hotel, for instance, might benefit other places within the site, without them having to provide a particular effort for their promotion.

In the case of a common resource, externalities might arise. Externalities can be described as the non-compensation of the impact of someone's actions on someone else's well-being². Positive externalities happen when the social value, meaning the well-being, is higher than the private value; while negative externalities are the contrary.

Internalisation provides a tool to regulate these externalities. For instance, a tax on the greenhouse gas emissions can be considered as a way to prevent the negative externality. Also, a government subsidy for a research on medicines could benefit the entire society, in case the research ends on a marketable product. Internalisation can be either come from governmental entities, or might be shared with private ones, through associations or contracting between parties.

¹ DEPETRIS-CHAUVIN, Nicolas, Microeconomics course, Haute Ecole de Gestion de Genève, Academic year 2016-2017

² DEPETRIS-CHAUVIN, Nicolas, Microeconomics course, Haute Ecole de Gestion de Genève, Academic year 2016-2017

3. Methodology

This chapter describes the global research methodology for the different dimensions studied in the report. More detailed explanations will be developed in the specific sections for each aspect researched.

The methodology is distinct for the analysis of the demand and supply sides. Indeed, despite the final comparison of both aspects, the way to develop the perception and promotion requires to have different approaches.

As a first step, two methods were used to gather data:

- For the demand side, an anonymous online survey, open to anyone.
- For the supply side, face-to-face and phone interviews, with a tailored set of questions for each participant.

The combination of these two methods, allows, on the one hand, to have precise and short answers for the public's perception and behaviour and, on the other hand, to have a detailed insight into the promotion done by the selected actors who promote, directly or indirectly, the area.

The method for the analysis of the survey varies depending on the aspect studied:

- For the perception analysis, the social representations' method.
- For the activities and places visited, part of the social representations' method, without importance analysis.
- For the wine consumption, proportions and relationships.

Regarding the supply side, the promotion strategy and values highlighted were the main determinants in the analysis of the interviews.

The demand side's data were collected first, while the supply side's data collection happened as a second step. This sequence of actions enabled to select the right actors to interview, as well as to orient the interview questions to provide an in-depth analysis. Also, this allowed to include findings of the survey's study in interviews questions.

In order to remain as neutral as possible, a constrained-continuous word association was used to gather data regarding the perception of the public, as part of other questions in the same online survey. No referral to UNESCO was made at the stage of the word association, which was the first question asked. The memories, mental representation, imagination and education of the participants might play a role in the results found, including factors such as where people grew up and their relationship with the area. Some answers can be quite far from the representation that most people have of the area, but still help identifying a gap in the knowledge related to the place

One of the advantages of the online data collection is that people can do it by themselves, without any social pressure or peer judgement. Also, they choose the time and place at which they answer the survey, and therefore can provide more detailed answers.

The interviews were conducted mostly face-to-face, one of them having been conducted by phone. The face-to-face contact allowed a deep development of the answer, the observation of the environment, as well as the establishment of a more trustful contact with the interviewees. No recording was made, as the goal of the interviews was to understand the way the promotion was done, based on what aspects and for which visitors. Therefore, recording seemed irrelevant for the situation. Notes were taken by hand, to avoid the barrier of a laptop screen between the interviewee and interviewer.

After the interviews were performed, a first rewriting of the detailed notes was made, to then establish synthesis of each interview, classified into specific themes. The synthesis allowed to organize the data before the analysis, enabling to better visualise the promotional aspects.

Table 1 Demand side's methodology - Summary

<i>Field of study</i>	Perception	Visits and activities	Wine consumption	UNESCO's definition
<i>Methodology</i>	Social representation's method	Centres of interest and frequencies	Proportions and relationships	5 dimensions and frequencies
<i>Segmentation</i>	Geographical Generational Gender-based	Geographical Generational Gender-based	Consumption-based	No segmentation

4. Demand side – Perception and behaviour

This chapter will analyse the four dimensions mentioned in the survey. The first four sections describe the data collection method and procedure. Section 4.5 deeply studies the perception of the public, split into defined segments. In the wine consumption analysis section, the consumption preferences, as well as the influence of UNESCO on wine consumption, are developed. Section 4.7 analyses the places visited and activities taken in Lavaux, for the same segments as in section 4.5. Finally, the participants' definition of UNESCO is developed in section 4.8. To summarise the results of the demand side, section 4.9 groups the different conclusions of each section to provide a short and concise insight of the key findings.

4.1 Data collection

To collect data, a global survey was created with the online tool Survey Monkey. The survey included qualitative and quantitative questions, in order to help research the public's perception and habits. The survey didn't have any specific target in terms of age, geographical location or socio-economic class.

4.2 Participants

The sample statistics are described in Appendix 1. Three main segments were created to enable the understanding of each group:

- Geographical
 - Lavaux perimeter, detailed in Appendix 2.
 - Western Switzerland, including the participants from the French-speaking part of Switzerland, but excluding Lavaux perimeter
 - Eastern Switzerland and Abroad, including Swiss German-speaking communes and foreign countries
- Generational, based on Francis and Hoefel (2018) defined generations
- Gender-based, between men and women

No segmentation was made based on the professional activity of the participants. Indeed, only two participants occupied wine-related positions, while other segmentations in regard to profession didn't seem relevant for the study.

Regarding the wine consumption, no demographic segmentation was made. Results were analysed based on the frequency of consumption of each participant.

4.3 Procedure

The participants were asked, in total, eleven questions in the online survey, which they were free to answer whenever they had time. In case of a participant who has never drunk wine, the number of questions was reduced to eight. The list of the questions is available in Appendix 3. The survey was split into three main parts:

- Perception and visits
- Wine consumption
- Demographics

Based on these three dimensions, the analysis was performed, excluding answers without indication of demographics.

4.4 Perimeter

To provide the analysis by the participants' current geographical location, their postcode or country of living, in case they lived abroad, was asked. It allowed then the division into the three groups, mentioned in section 4.2. Lavaux Perimeter's segment includes the following communes:

- Lavaux's area, including all the communes of Lavaux, as defined by Lavaux UNESCO.
- All the communes of Canton de Vaud located in a 5km periphery around the Lavaux protected area communes, calculated with the help of the Etat de Vaud's districts and communes map.
- All the neighbouring communes of Canton de Fribourg, according to the Fribourg Canton Map and Etat de Vaud districts and communes map.

4.5 Perception analysis

4.5.1 Data lemmatisation, semantic categorisation, translation

From the raw data, the lemmatisation, semantic categorisation and translation into English was performed. The choices made for the semantic categorisation are described in Appendix 4.

As the majority of the answers were given in French, the lemmatisation and initial semantic categorisation were done in this language. The translation was done at the last step before the results analysis, with an official Larousse French-English dictionary.

The same semantic categories were used for all the segments defined, to enable a better comparison among the different groups.

4.5.2 Data analysis

In order to provide a consistent analysis, the frequency criterium was defined separately for each segment, while the importance criterium was the same for all segments. For this last, the first word given was considered as *Very important*, while the two next ones as *Less important*. This separation proved to be relevant during the analysis of the results. Regarding the frequency, the division was decided according to the frequency graphs for each group, available in Appendix 5.

4.5.3 Polarity index

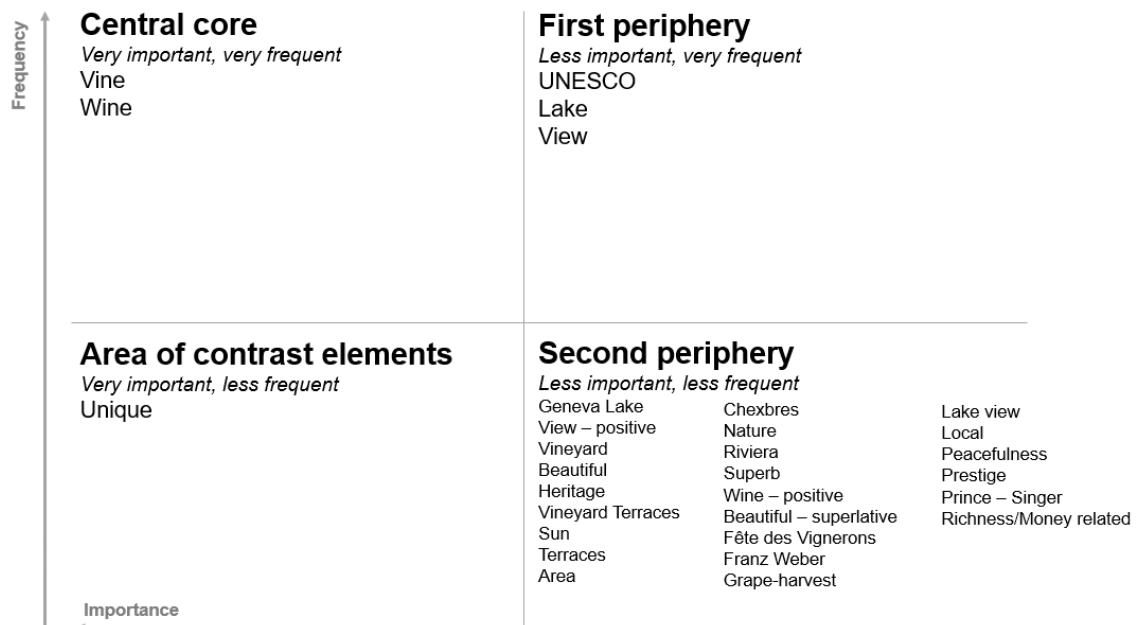
Globally, the attitude of participants is either neutral, or positive. Only two answers, among the total of 566 words and short sentences, were negative: *Bad wine* and *Expensive*. The neutral words given can't be assumed as positive or negative, due to the lack of precision or context. Therefore, it didn't seem relevant to perform any polarity analysis, as it would, in any case, suggest a positive outlook on the topic.

4.5.4 Results

4.5.4.1 Geographical segmentation

4.5.4.1.1 Lavaux perimeter

Figure 2 Perception of Lavaux, Lavaux Perimeter



As the Frequency and importance analysis shows, people living in Lavaux or its periphery mainly associate the area with wine-related things: *Vine* and *Wine*. This perception is well-anchored between generations and can hardly be changed. These two

categories represent the group collective memory about the topic. They are not directly related to the reasons why Lavaux has entered the UNESCO World Heritage List, though, they prove the tight link between the area and its wine-related activities.

In the first periphery, three categories were frequently mentioned: *UNESCO*, *Lake*, and *View*. These three categories show a close relationship to the reasons why Lavaux has been nominated in the UNESCO, especially in terms of landscape configuration. People seem, individually, to have in mind Lavaux as an area with a unique view on the lake. It might be linked to personal experiences, such as memories or specific moments. The lake, in this periphery, wasn't specified as the Geneva Lake. Though, this is the main lake constituting Lavaux landscape.

Regarding the second periphery, various categories can be found, either linked to the nature (*Sun*, *Nature*), the vineyard (*Vineyard*, *Vineyard Terraces*, *Wine*, *Grape-harvest*), the landscape (*Geneva Lake*, *Lake view*), UNESCO-related aspects (*Heritage*, *Vineyard terraces*), as well as feelings with *Peacefulness*. All the words in this periphery were less frequent and more individual oriented. Some personal links can be assumed, such as *Chexbres*, which could be a place where someone lives or has had an experience, or *Beautiful*, *Superb*, as personal opinions that people have made while visiting the area. The words *Heritage* and *Terraces* could be associated with the UNESCO. Indeed, even though, for this evocation of heritage, the UNESCO wasn't specified, it still has a strong link with the World Heritage List. Also, *Terraces*, as explained before, can be attributed to restaurant terraces for example. Though, it is also representing a reason why Lavaux is in the UNESCO, with the terrace vineyards. The answer regarding Prince, the singer, is another typical example of an individual experience, in which the person associates the area with the song "Lavaux" written by the famous singer.

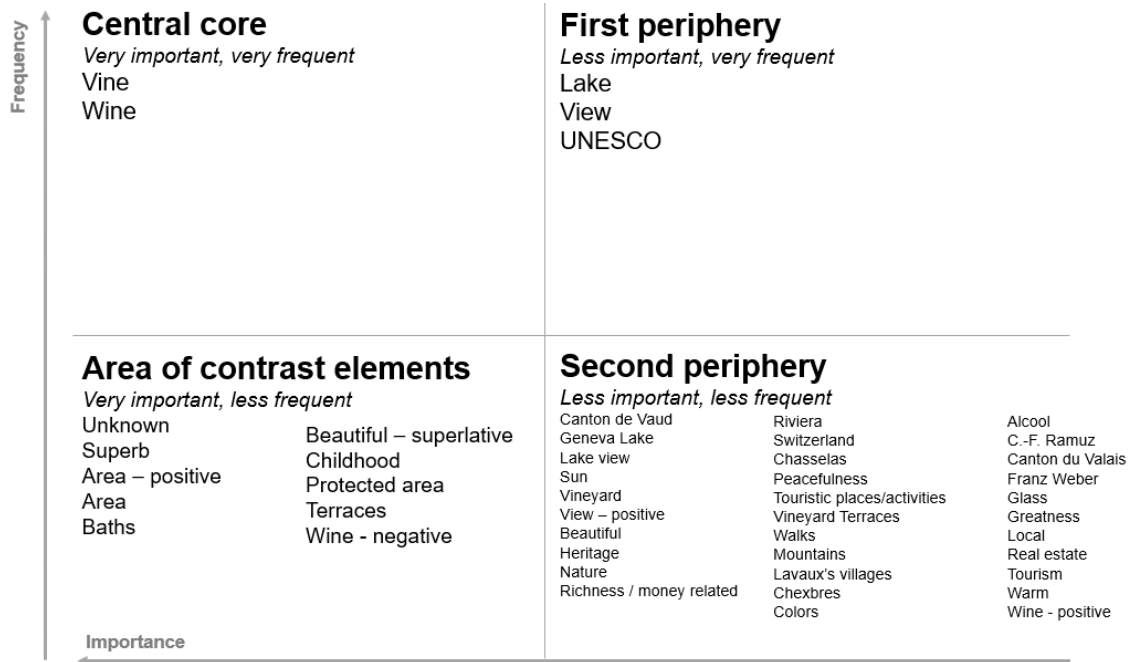
Finally, for the Area of contrast elements, *Unique* was the only category coming out with a low frequency but still important. People often quoted the uniqueness of Lavaux first, highlighting the specificities of the place compared to other vineyards. As this hasn't been specified in the answer, they might have thought about the uniqueness of the landscape, the traditions, the work of the humankind in the area, or a unique experience they had in Lavaux.

To summarise the results for the Lavaux Perimeter group, it can be concluded that people easily associate Lavaux with its main activities, which are wine-related, as well as the landscape and the UNESCO. This last proves that the nomination in the World Heritage impacted the perception people have on it, as this is among the first words

people think of when they are asked about Lavaux. The other aspects were probably present already before the nomination of the area to the UNESCO.

4.5.4.1.2 Western Switzerland

Figure 3 Perception of Lavaux, Western Switzerland



In Western Switzerland, the Central core and the First periphery are identical as in Lavaux perimeter, which proves the similarities of both groups in their collective memories, as well as in individual experiences.

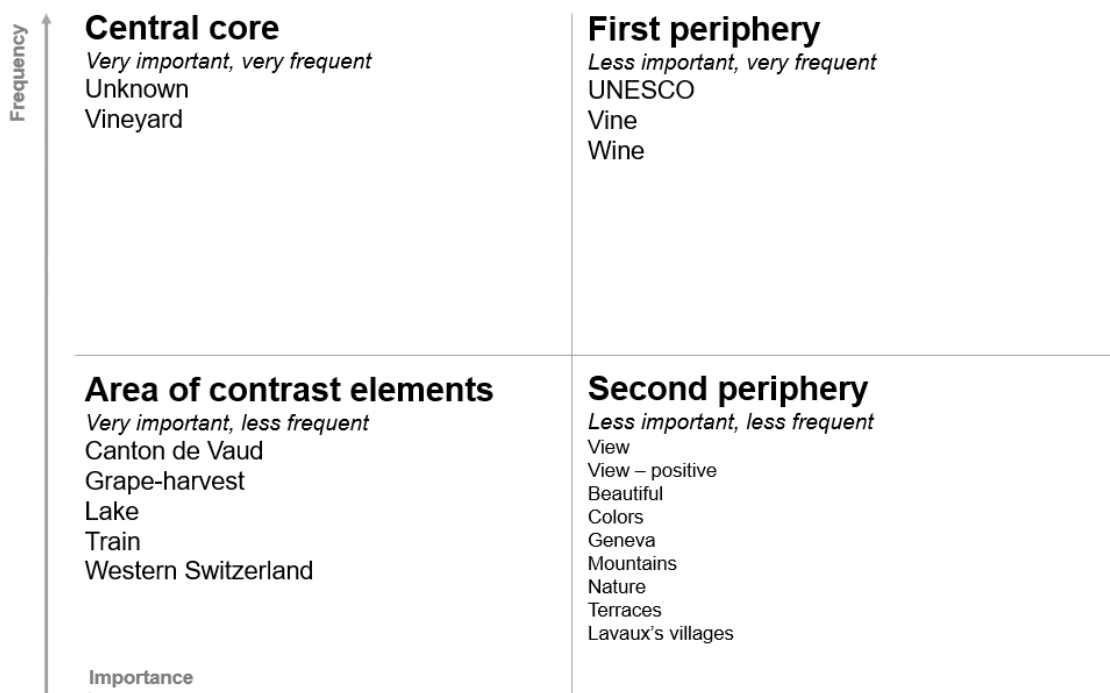
The second periphery's answers remain similar, with the link with nature (*Sun, Lake, Nature, Mountain*), with wine (*Vineyard, Chasselas, Alcool, Glass*), and some UNESCO-related aspects. Though, in this segment, there are more “visitors” points of view mentioned: *Walks*, some touristic places and activities and villages, which are also well present in the places people visited in Lavaux. These show a more external point of view of the area.

In the contrast zone, though, the differences with Lavaux perimeter are greater. There are also some UNESCO-related aspects and opinions on the site, globally positive, even though the negative opinion on the wine is present. *Childhood* relates to someone who has probably grown up in Lavaux or has strong memories as a child there. However, *Unknown* and *Baths* highlight a lack of knowledge of the area even in Switzerland, in further located places, and are important to consider. *Baths* shows maybe that the participant confused Lavey and Lavaux, close in terms of pronunciation.

Therefore, this second segment strongly associated Lavaux with its main components, the vineyard, wine and the landscape. As for the Lavaux perimeter inhabitants, UNESCO is well-present in people living in Western Switzerland's minds and has had an impact on their perception. In this group, this is also important to raise the inexistent or poor knowledge of the area of some, despite the small distance of the site with the rest of Western Switzerland.

4.5.4.1.3 Eastern Switzerland and abroad

Figure 4 Perception of Lavaux, Eastern Switzerland and abroad



This last geographical segment differs from the two first ones. *Unknown* and *Vineyard* are composing the central core, proving that people living far from Lavaux either don't know it at all, or know that it is a vineyard, in the memory of the group. UNESCO doesn't come up first, even though it could have been thought so, considering that it is supposed to be a recognition outside the borders as well.

In the first periphery, *UNESCO* appears, as well as wine-related aspects. People living quite far from Lavaux still associate it with its UNESCO recognition, as individual experiences, and with its main economic activity, wine. It could have been expected to have results more oriented on touristic activities, walks or villages, as Lavaux might be more a touristic location for the people coming from far. Villages have come up less frequently and with a low importance, but the two others haven't been mentioned.

In the second periphery, then, the view, the beauty, as well as nature aspect are present. Individually, people still recognise the place as a natural and landscape-worthy area.

The contrast elements are more global to the place: *Canton de Vaud, Western Switzerland, Lake*. They show that people from abroad or from Eastern Switzerland see it as a whole with the canton or the area. *Train* probably highlights the idea of passing by Lavaux with one of the two train lines crossing the vineyard.

To conclude, people living far from Lavaux have a more global view of the place, or don't know it at all. Even though the relationship with wine is still mentioned, this relates more to individual experiences than collective memory.

4.5.4.1.4 Comparison

As noticed in the two first segments, the collective memories and individual experiences don't vary, whether people live in Lavaux or in a quite close location, linking Lavaux with wine-related aspects. There is a more touristic vision of the place from people living outside Lavaux but still in Western Switzerland. These results aren't surprising in themselves, considering the main activities of the area.

In all segments, the UNESCO aspect is present, in individual experiences. Globally, it can be concluded that UNESCO has had an impact on all populations, in Lavaux or somewhere else.

Still, the lack of knowledge of the place increases, the farther the person lives from Lavaux. This could be logical for many places, though, for a UNESCO World Heritage site, this is quite surprising, as the UNESCO is, somehow, also supposed to increase the recognition of a place outside its borders.

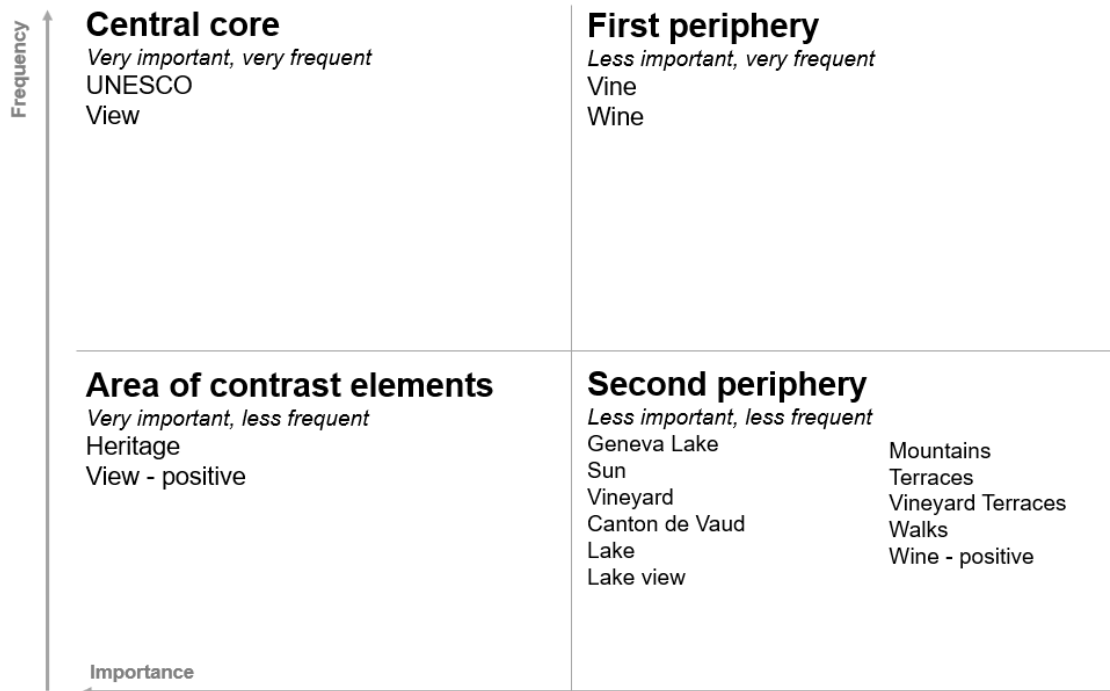
Finally, people visiting Lavaux seem to come from outside the area, but in a close perimeter, mainly limited to Western Switzerland. A first conclusion can be, that Lavaux attracts local tourists, despite its international recognition.

4.5.4.2 Generational segmentation

4.5.4.2.1 Baby Boomers

UNESCO appears, for the Baby Boomers, as the group memory, with the view in the area. In this generation, people put a greater importance on the heritage aspect and on the landscape in the area, than on the wine-related activities. This displays a stronger attachment to the heritage by the older generations, including probably the idea of protection as well.

Figure 5 Perception of Lavaux, Baby Boomers



In individual experiences, the first periphery proves the link people make between Lavaux and its wine-related activities. This might be related to the drinking of Lavaux wine, the participation to wine-related events, or even to a family member active in the wine industry.

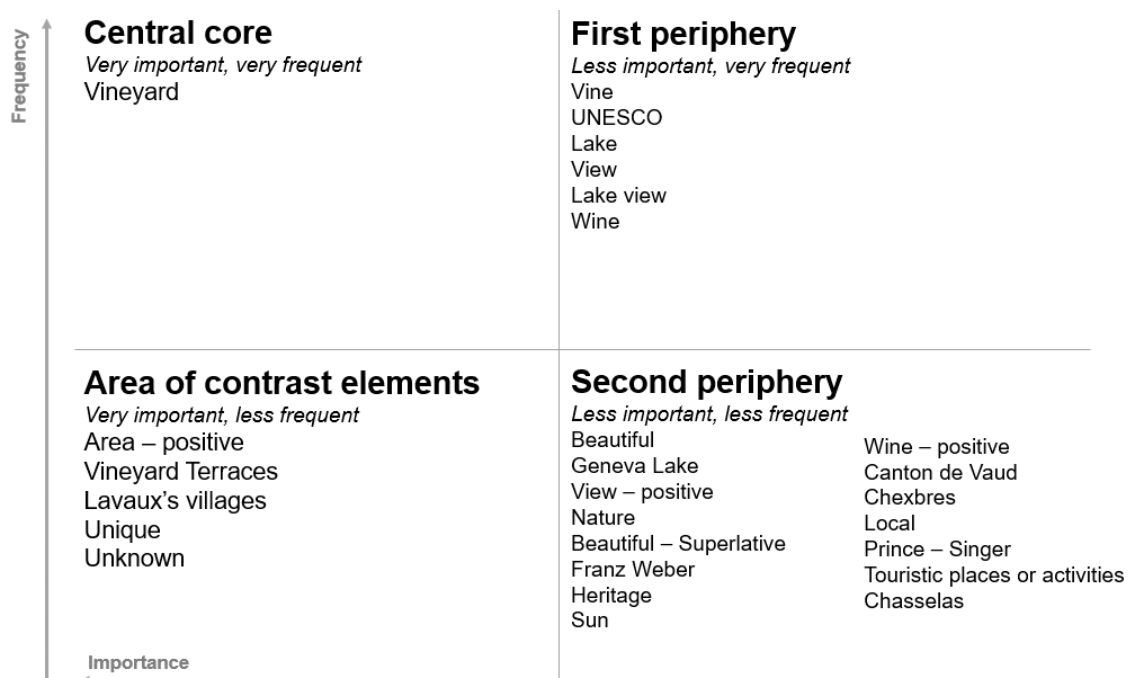
The second periphery is highly related to the configuration of the landscape and the view (*Lake, Vineyard, Mountains, Vineyard Terraces*). *Walks* let think that Baby Boomers have individually visited Lavaux through walks, that they have had an experience in that sense in the vineyard, admiring the view.

In the contrast area, *Heritage* and *View – positive* consolidate the central core results: Baby Boomers put a major importance to the heritage and landscape configuration of the area. The protection of the heritage, of the site, of what has been built by human, is probably key for this generation.

Therefore, Baby Boomers put a strong focus on the heritage aspects, while still having visited the area, enjoyed its landscape and its products. This can be linked to the fact that they might be more conservative towards the landscape, towards what the human has built over the years, and that they don't want to see it disappear over the next generations.

4.5.4.2.2 Generation X

Figure 6 Perception of Lavaux, Generation X



For the Generation X, the central core rests on the vineyard itself. People born between 1960 and 1979 have collectively the image of Lavaux a vineyard, without focusing on the UNESCO aspect, on the view or on the products themselves.

In the first periphery, the results are more various. The landscape (*View, Lake, Lake view*) and the UNESCO come up, as well as wine. *Vine* can confirm the idea present in the central core. This highlights that people tend to have individual memories of Lavaux’s view, and the registration to the UNESCO to protect the heritage.

In the second periphery, there are many varied answers as well, going from cultural or personalities (*Franz Weber, Prince*), the beauty of the area and the landscape, and the touristic aspect, confirming the first periphery’s results on individual experiences. Generation X people have probably spent moments in Lavaux’s area, globally having a positive view as well, that is be on the products or on the landscape.

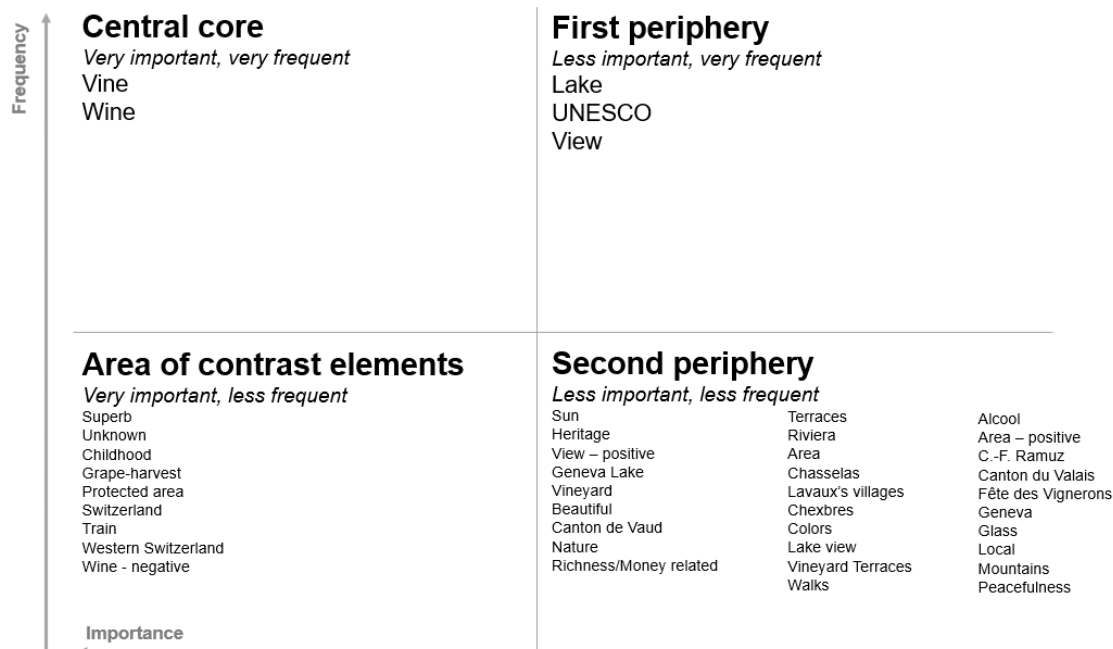
The contrast elements are numerous, combining different ideas: on the one hand, the vineyard terraces, the villages and the uniqueness of the place, as a whole, composing part of the reasons why the site is registered, and, on the other hand, the lack of knowledge, which is inexistent in the Baby Boomers results.

To conclude, the landscape configuration is the main aspect retained by Generation X, the wine-related aspects coming more as individual experiences. The heritage

dimension is less present than for the Baby Boomers, even though it is recognised as important.

4.5.4.2.3 Generation Y

Figure 7 Perception of Lavaux, Generation Y



The results for Generation Y show a strong focus on wine-related aspects. Indeed, in the central core, there is no mention of the heritage, the landscape or the UNESCO. This might show a stronger interest of this generation in wine rather than for the site itself. Collectively, this generation might see Lavaux as a wine-producing area rather than a site whose traditions and configuration are unique.

The first periphery, on its side, shows the individual interest of this generation in the landscape, as well as the UNESCO. People might have heard about the UNESCO nomination during their teenage or start of adulthood and have an interest in the view on the lake offered by Lavaux, maybe during walks, events, or pictures on social media.

Many different fields are mentioned in the second periphery, adding more precisions on how people might have had an interaction with the place: walks in the villages, wine drinking, a natural place to find peace. *Canton du Valais* is a surprising result, which could display either, a lack of knowledge of the area geographically, or, the association of Lavaux with Valais' vineyard.

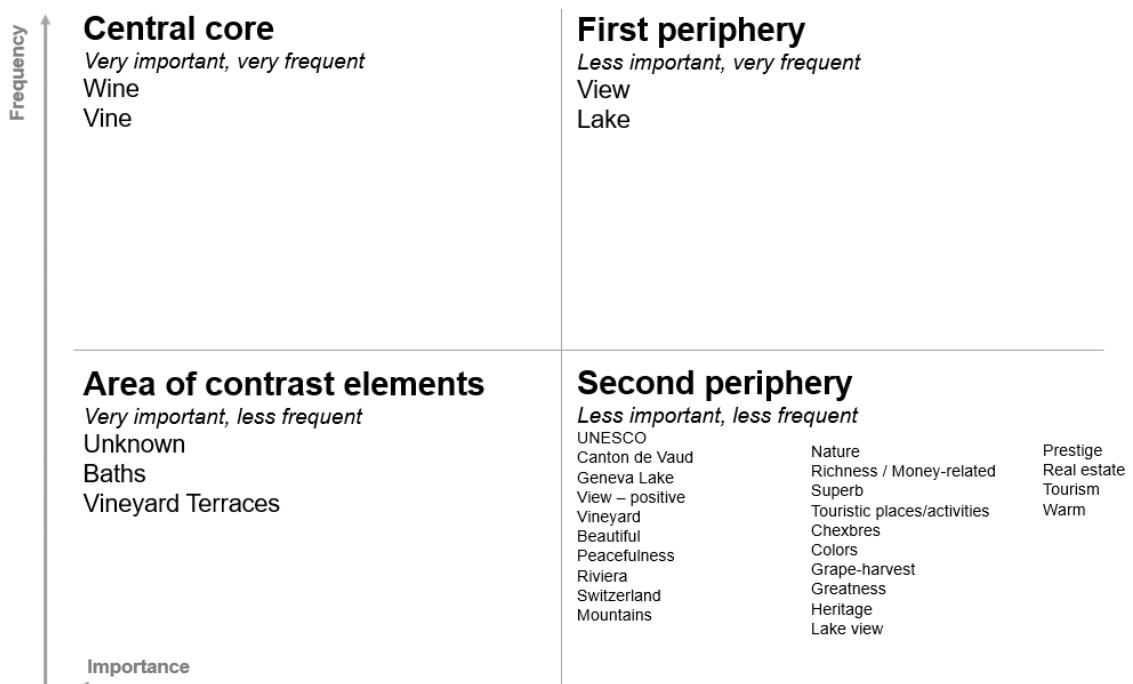
In terms of contrast elements, they are quite numerous – going from the protection aspect, to wine activities, with global ideas such as *Switzerland* and *Canton de Vaud*.

This last, associated with *Unknown*, could let think that there isn't a deep enough knowledge of the place for what it is actually.

To summarise, Generation Y has a strong focus on wine and wine-related activities, putting lower importance on the landscape and UNESCO aspects, which are more individually experienced. Also, there seem to be a tendency to have a less precise knowledge of what is behind Lavaux's wine in terms of human and nature interaction, or heritage.

4.5.4.2.4 Generation Z

Figure 8 Perception of Lavaux, Generation Z



In Generation Z, the collective memory and main individual experiences are very similar. The difference lays in the absence of UNESCO in these two quadrants. Indeed, the heritage aspects are nearly all present in the second periphery, highlighting the lower interest of this generation for the heritage and traditions of the site.

The lake and the view compose the major individual experience of people from this generation. They might have a stronger interest for such places, potentially linked to the importance of social media, the display of incredible pictures, and the willingness to have been to and shown amazing places.

In the second periphery, wider ideas (*Riviera, Canton de Vaud, UNESCO*) are present. Also, tourism is defined as individual experience for this generation, which might be

linked to the idea of punctual visits in the area. Though, walks and villages aren't mentioned at all, which might prove that younger people tend to come at one place, without exploring the area in its whole.

The contrast elements, even though they include the vineyard terraces aspect typical to Lavaux, highlight the lack of knowledge of the area. *Unknown* and *Baths* prove that they might be less interested in discovering the place.

Therefore, people born in 1995, or after, tend to know the products and the view itself, without considering the heritage and traditions behind. They might be less interested by the history and want to live the present moment, while standing out by showing their presence in a superb landscape on social media.

The absence of the mention of UNESCO can be linked to the fact that this generation was a bit too young to realise what it meant, at the time when the nomination happened.

4.5.4.2.5 Comparison – Generational segmentation

The generational segmentation follows a progressive evolution: the older, the most importance on the heritage, the UNESCO and the uniqueness of the configuration of the place; the younger, the most importance on the products. These results are contradictory with the usual definitions of generations. Indeed, according to Francis and Hoefel (2018), older generations tend to be more materialist, more consumption-oriented, while younger generations look more for experience, closer to ethical principles and nature.

The interest in the heritage decreases over generations, which could be a warning, in the sense that younger generations might forget about what is behind the vineyard terraces, the vines growing in a unique vineyard configuration.

The social media and digitalisation might have impacted this trend: over the last years, social media increased the importance of showing amazing landscapes, that Lavaux offers with the vineyard and the lake, while they decreased the interest of showing the tradition behind.

4.5.4.3 Gender-based segmentation

Considering the few differences between both genders, the analysis will highlight only the similarities and differences, on a comparative basis.

Wine-related aspects compose the central core, showing the collective idea of the public, no matter whether they are men or women. The first periphery is a well identical, with the UNESCO and landscape aspects. Individually, then, people put an importance on

the heritage and on the view offered by Lavaux, maybe during walks, visits, or opinion they have on the area.

Figure 9 Perception of Lavaux, Women

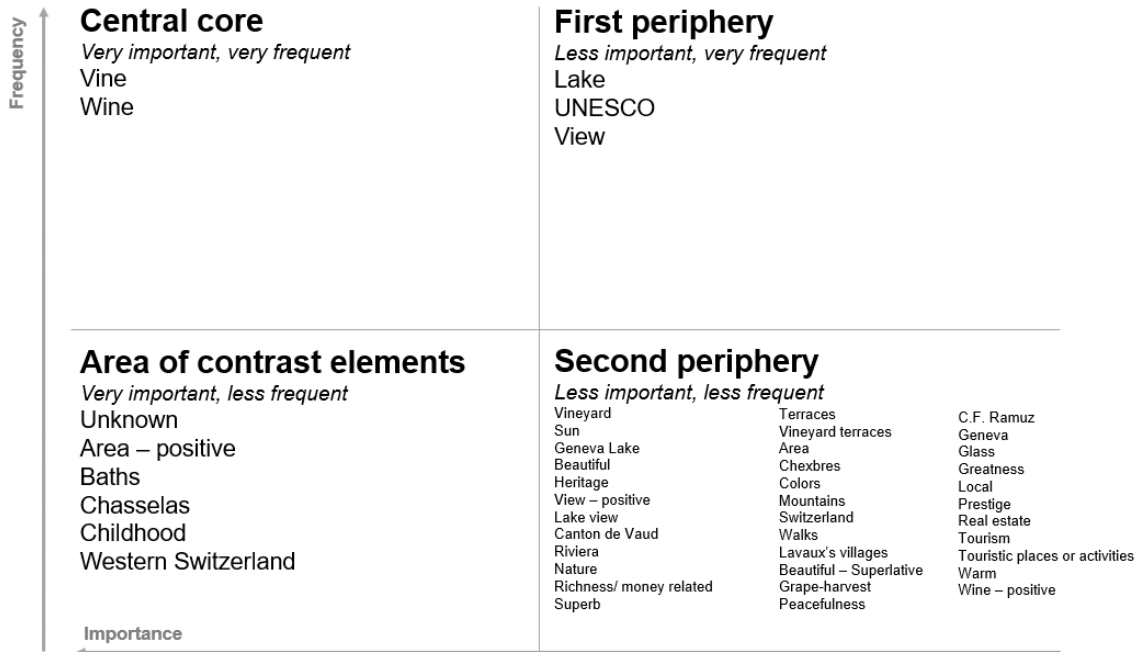
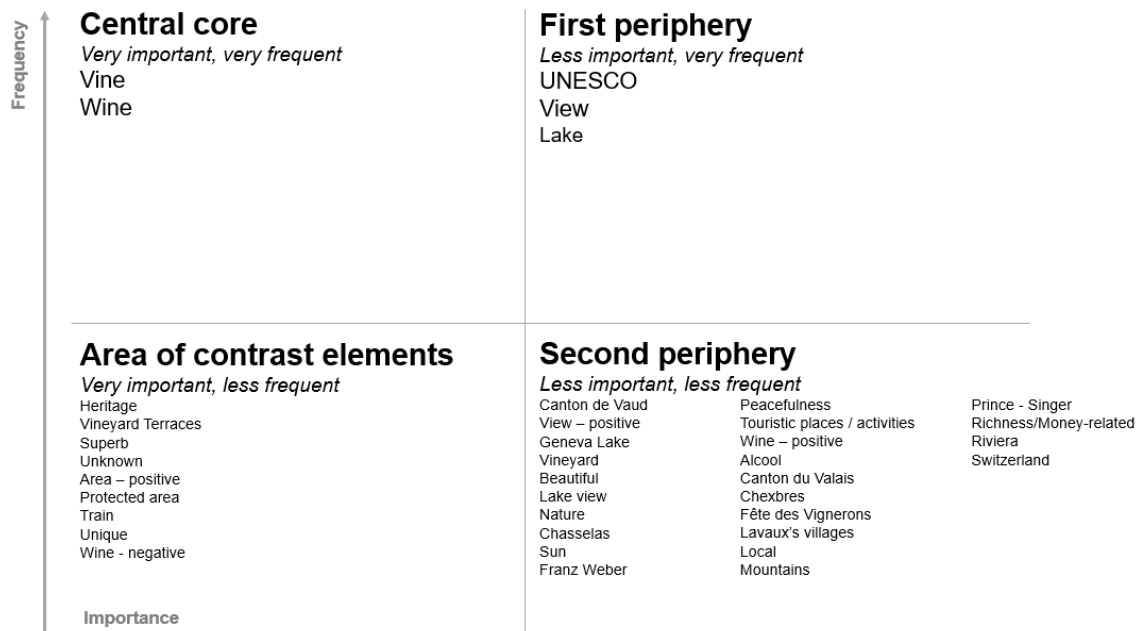


Figure 10 Perception of Lavaux, Men



The second periphery varies a lot, that it be for men or women, including several different aspects – nature, wine, tourism, beauty. Men seem to put more focus on specific events or personalities, such as Franz Weber, Fête des Vignerons and Prince, which could mean that there is a greater interest from men towards culture.

The contrast zone, however, differs depending on the gender. Women tend to have a less specific vision of Lavaux, with several categories linked to that: *Area*, *Western Switzerland*, *Unknown* and *Baths*, these two last proving the lack of knowledge. On the other hand, men give more importance to UNESCO-related aspects: *Heritage*, protection, *Vineyard Terraces*. The unknown aspect also composes the contrast zone for men.

To summarise, the perception of Lavaux doesn't differ in its core and individual experiences depending on the gender. Women might be less interested or knowledgeable about the area than men, which might, on their side, be more oriented towards the culture and traditions behind the site.

4.6 Wine consumption analysis

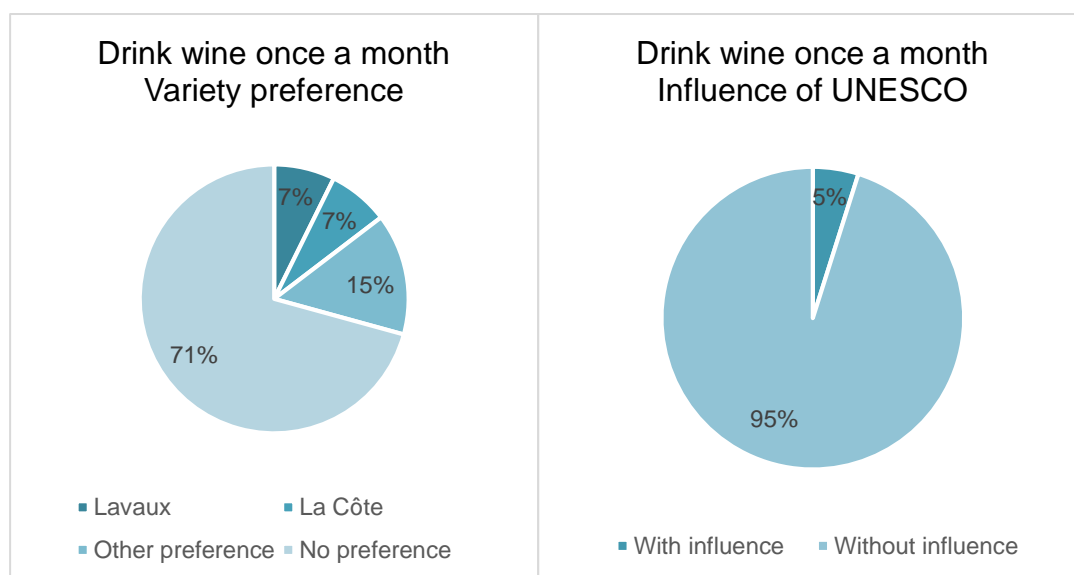
4.6.1 Global results

The global results show that the participants to the survey are, for the majority, occasional wine drinkers, with a total of 86% of participants drinking wine once a week or less frequently. Amongst the participants, a large majority don't have preference in their choice of wine (67%) or prefer other wine varieties than Lavaux (23%). On its side, the UNESCO nomination has had little influence on the drinking habits of the participants.

4.6.2 Segmented results

4.6.2.1 Frequency of consumption: once a month

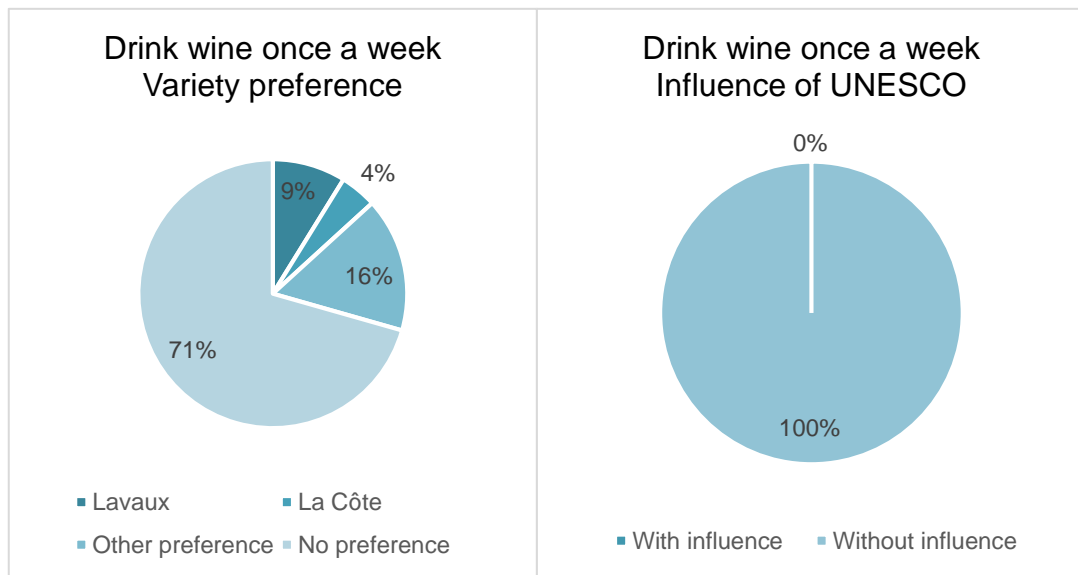
Figure 11 Consumption behaviour – Drink wine once a month



People who drink wine once a month don't differ from the general trends of the survey. They don't set a preference for Lavaux's wine, but rather on foreign varieties or Valais. The UNESCO nomination has had a slightly higher influence on this group of drinkers, due to the willingness to drink local or for the recognition of the white wine. From a critical point of view, these two reasons are not typically related to the UNESCO, as the locality and white wine were present before the UNESCO nomination

4.6.2.2 Frequency of consumption: once a week

Figure 12 Consumption behaviour – Drink wine once a week

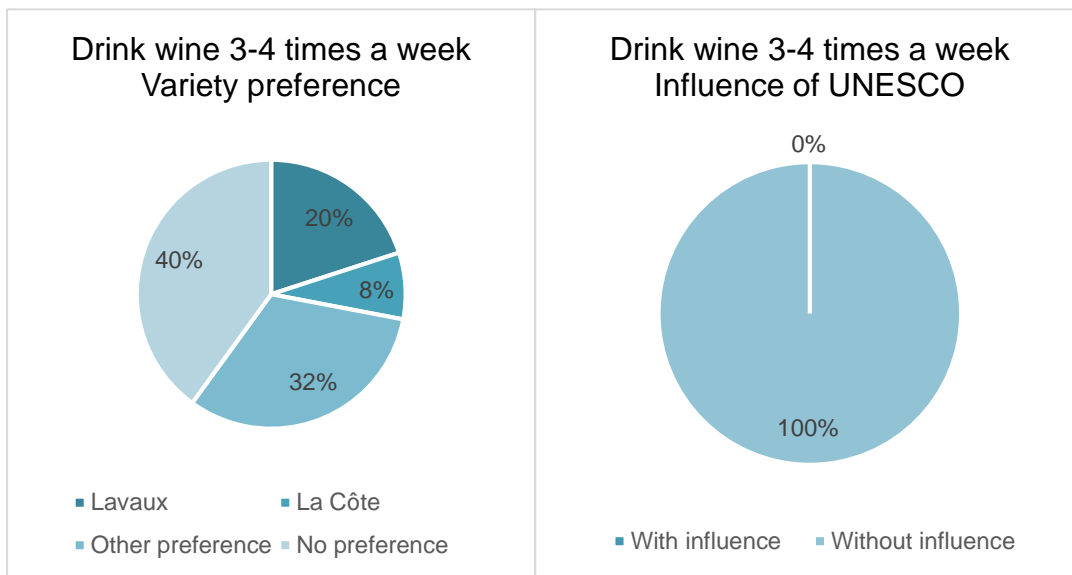


The results for people who drink wine once a week are very similar in terms of preference, with a slightly higher proportion of people favouring Lavaux's wine. The other preferences vary a lot, with either international varieties or other Swiss varieties. In this group, the UNESCO has had no influence on the choice of the wine.

4.6.2.3 Frequency of consumption: 3-4 times a week

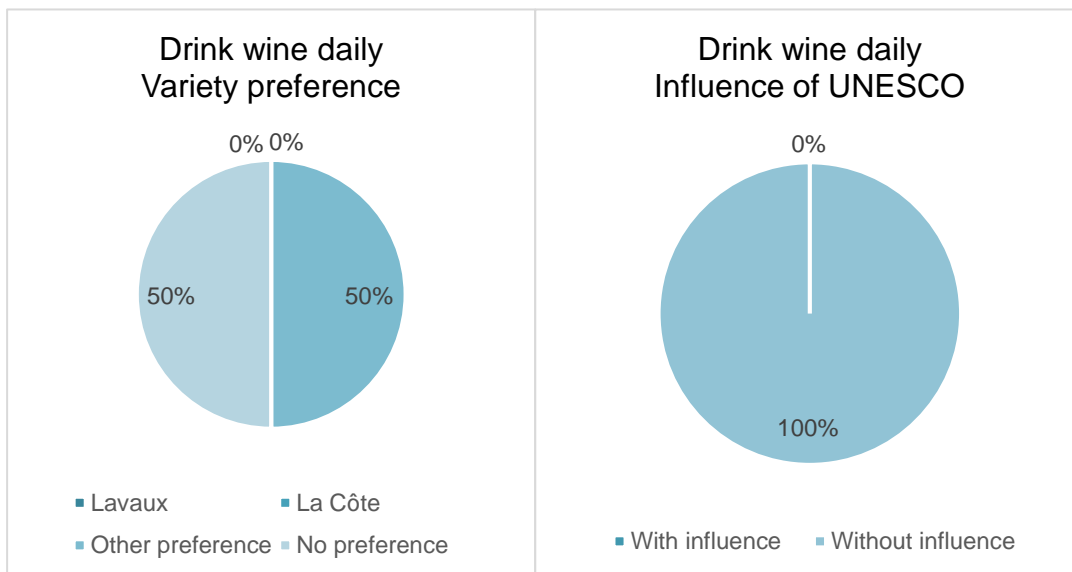
People who drink wine 3 to 4 times a week place a higher importance on the variety they drink. Indeed, even though a small majority still don't put any importance on what variety they drink, a third of them prefer some varieties. In the preference, foreign wines have been mentioned, as well as Valais and Geneva's wines. Lavaux also has an important part of the preferences. The UNESCO, for this group, hasn't had any importance as well on the wine drinking habits.

Figure 13 Consumption behaviour – Drink wine 3-4 times a week



4.6.2.4 Frequency of consumption: daily

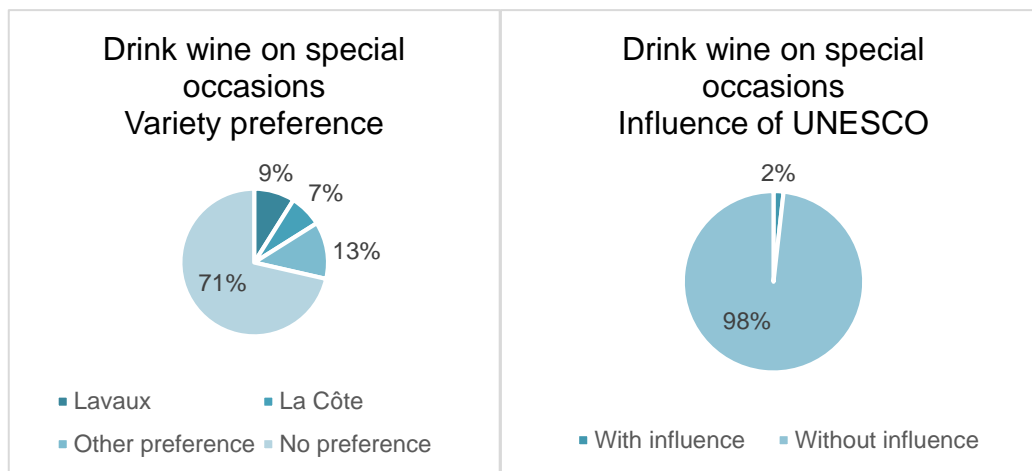
Figure 14 Consumption behaviour – Drink wine daily



The two participants who drink wine daily have no preference, or a preference for Valais's wine. Also, the UNESCO didn't have any impact on their consumption. Considering the low number of participants in this segment, no conclusion will be drawn based on that.

4.6.2.5 Frequency of consumption: Special occasions

Figure 15 Consumption behaviour – Drink wine on special occasions



Occasional wine drinkers, limiting their consumption to special occasions, tend to have no preference. Some of them prefer Lavaux and La Côte's wines, or other Swiss or French varieties. They probably drink what they own or are served on the moment. The UNESCO, for this group, has had an influence on one participant, for the increased interest raised by the UNESCO nomination.

4.6.3 Conclusion – Wine consumption analysis

Globally, the results display a nearly inexistent influence of the UNESCO nomination on wine drinking habits, especially in terms of change in people's behaviour, according to their answers.

Regarding the preference, logically, frequent drinkers tend to have a preference for a variety, maybe as they might be more knowledgeable about wine. Occasional drinkers, drinking wine once a week or less frequently, prefer to vary amongst different wines and have no preference.

An analysis was performed in terms of geographical location of the wine drinkers. The UNESCO hasn't had any influence on Lavaux's inhabitants drinking habits. Though, it has had an influence only on drinkers without pre-defined preference in the variety consumed.

Also, regarding the wine drinkers living in Lavaux, 22% of them drink local wine - Lavaux - which is the highest preference displayed. This could be linked to the willingness to favour local products, the ease of purchase of such wine, a family link, or the market in the area that might favour Lavaux's varieties.

4.7 Analysis of the activities and places visited

4.7.1 Data categorisation

Based on the answers of the participants, a categorisation was established, according to the following principles:

- Many participants mentioned several places or activities, which were each split in single entries.
- Each entry was included in a category defined, either representing a group of places, or a single place or activity.

This allowed, on the one hand, to group similar activities, while, on the other hand, to keep relevance for further analysis.

Detailed clean-up and categories' decisions are available in Appendix 6.

4.7.2 Data analysis

The analysis of the data was based on frequency only, without setting an importance order. Indeed, the sequence in which the places have been listed might depend on chronology, without preference set, consciously or not, by the participants.

The same segments, geographical, generational and gender-based have been used as for the perception analysis.

4.7.3 Results

4.7.4 Geographical segmentation

In all three segments, the visit of the villages and the walks in the vineyard, including moto and bike rides, are the most frequent activities. No matter where the visitors come from, visiting the place in itself is a common activity.

While wine tastings and visits of wine cellars are popular for Western Switzerland's inhabitants, including Lavaux, they are not of such interest for visitors from further locations. This could be due to the fact that tourists from far come when cellars are closed or are more into seeing what has been promoted through images: the view.

Logically, the catering industry attracts people from outside the Lavaux perimeter. On its side, Lavaux Express, which could have been thought as a touristic activity, was often quoted by Lavaux's inhabitants, as well as by Western Switzerland's visitors. This shows a local interest for this activity, providing a road-train tour in the vineyard.

Figure 16 Places visited and activities frequency – Lavaux perimeter

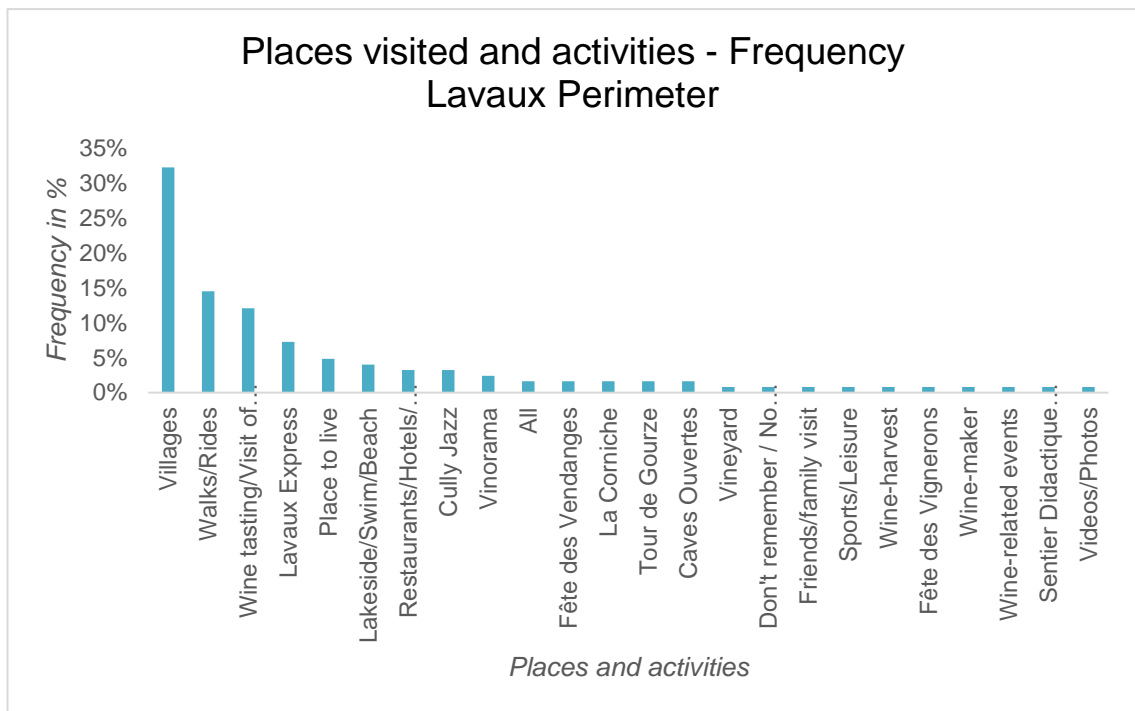


Figure 17 Places visited and activities frequency – Western Switzerland

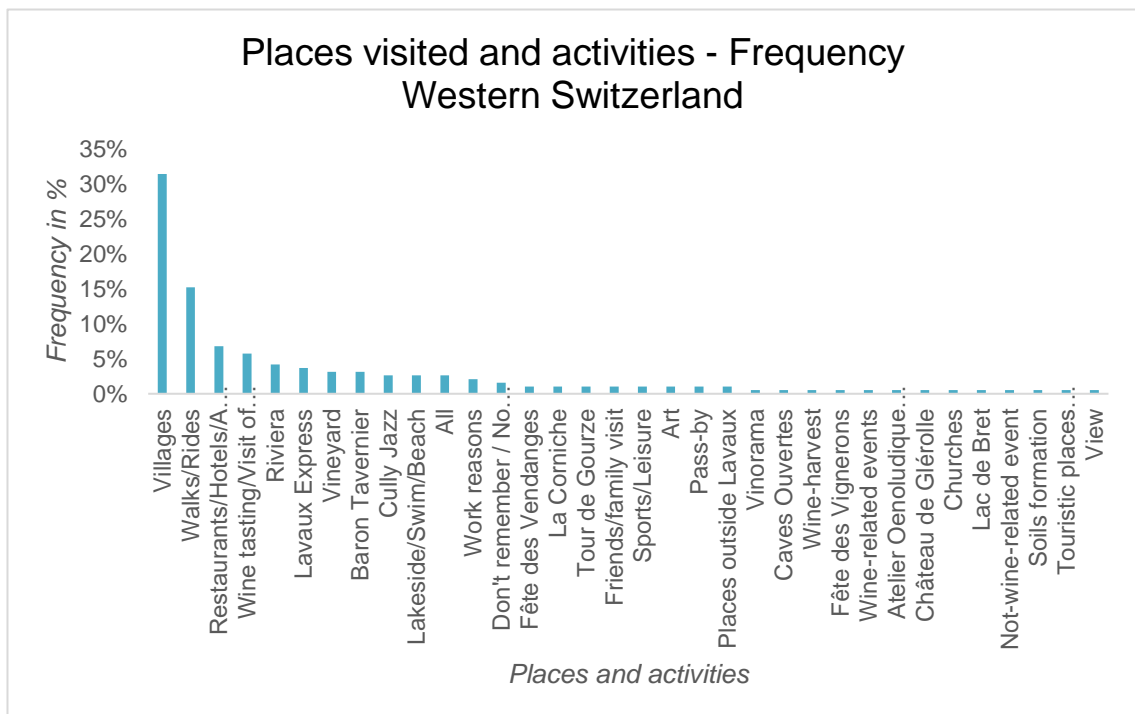
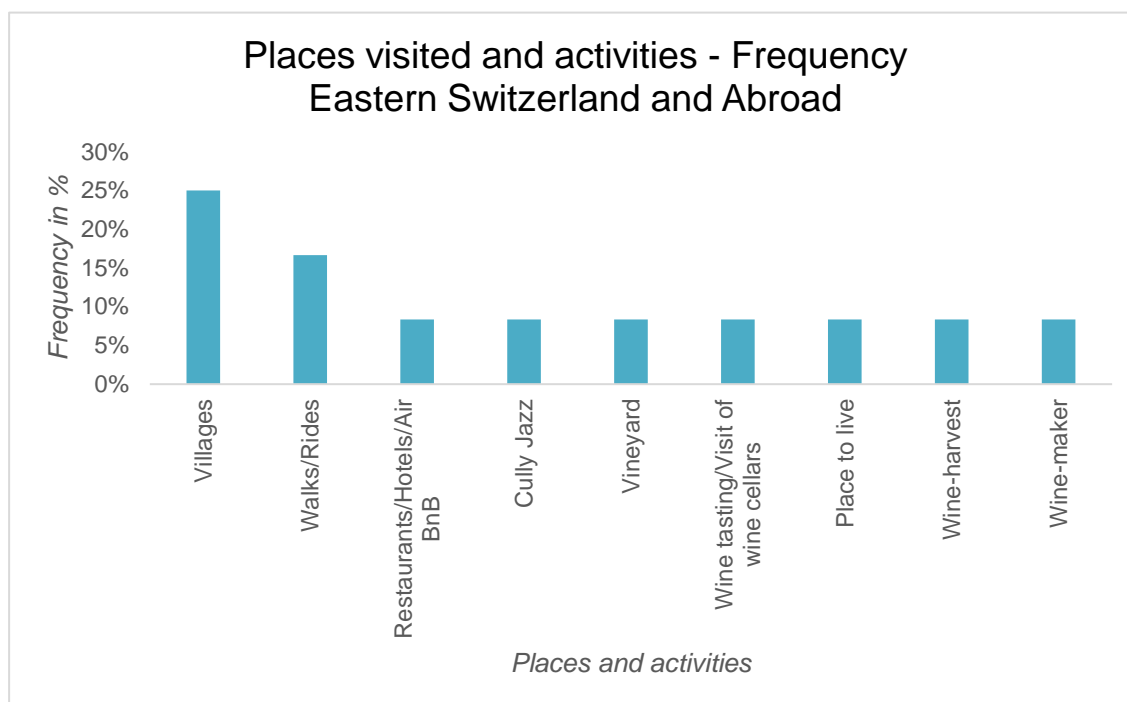


Figure 18 Places visited and activities frequency – Eastern Switzerland and abroad



The other activities are less frequent, while varied, between events such as Cully Jazz, Caves Ouvertes and Fête de Vignerons, lakeside and beach, and wine harvest.

In Western Switzerland, Lavaux is also often associated with activities or places in Vevey or Montreux, grouped in *Riviera*. This is an indicator, on the one hand, of an impact of Lavaux’s knowledge on its periphery, and, on the other hand, that the promotion of Lavaux is tightly link to Riviera as well.

Globally, people from Lavaux or Western Switzerland tend to give more precise places, to have been deeper in their visit of Lavaux. People from further locations’ answers are vaguer, either with wine-related activities or with specific events. Though, every visitor has spent some time walking and visiting the villages in the vineyard.

4.7.5 Generational segmentation

Amongst generational segments, the two top places visited, or activities are the villages and the walks or rides, showing a common interest for visiting the vineyard in itself, no matter the age of the visitors.

Wine tastings and visits of cellars are popular towards people born before 1995, being an attractive activity for these visitors. The youngest generation doesn’t even mention it, maybe due to lack of interest in wine, or to their young age.

Figure 19 Places visited and activities frequency – Baby Boomers

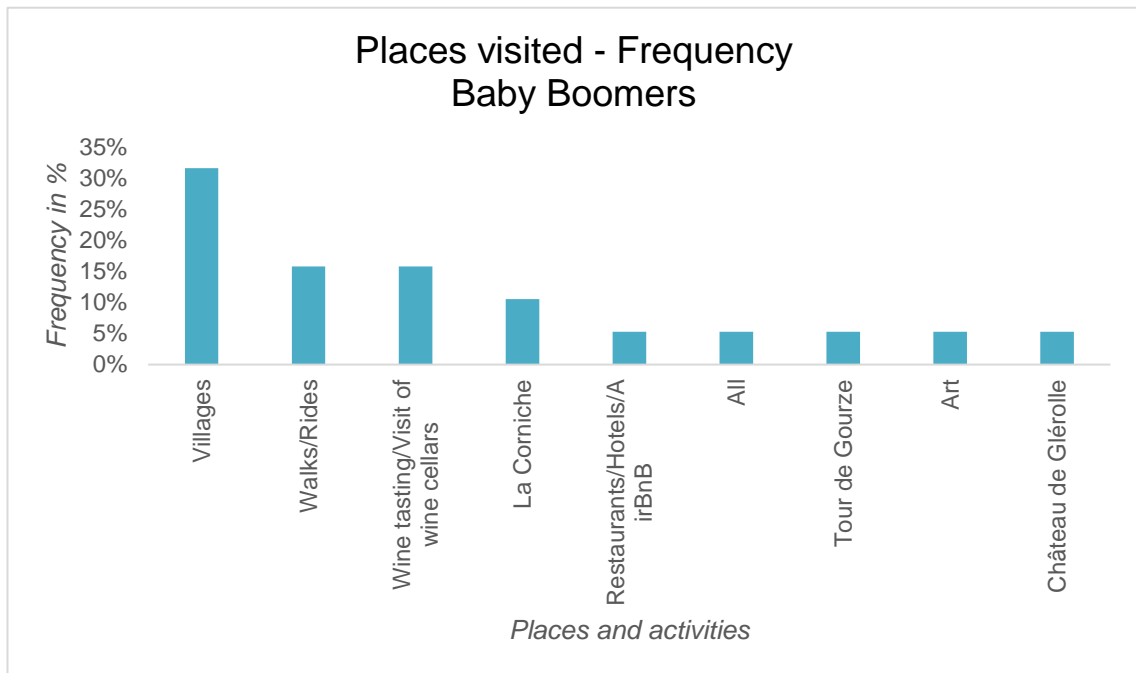


Figure 20 Places visited and activities frequency – Generation X

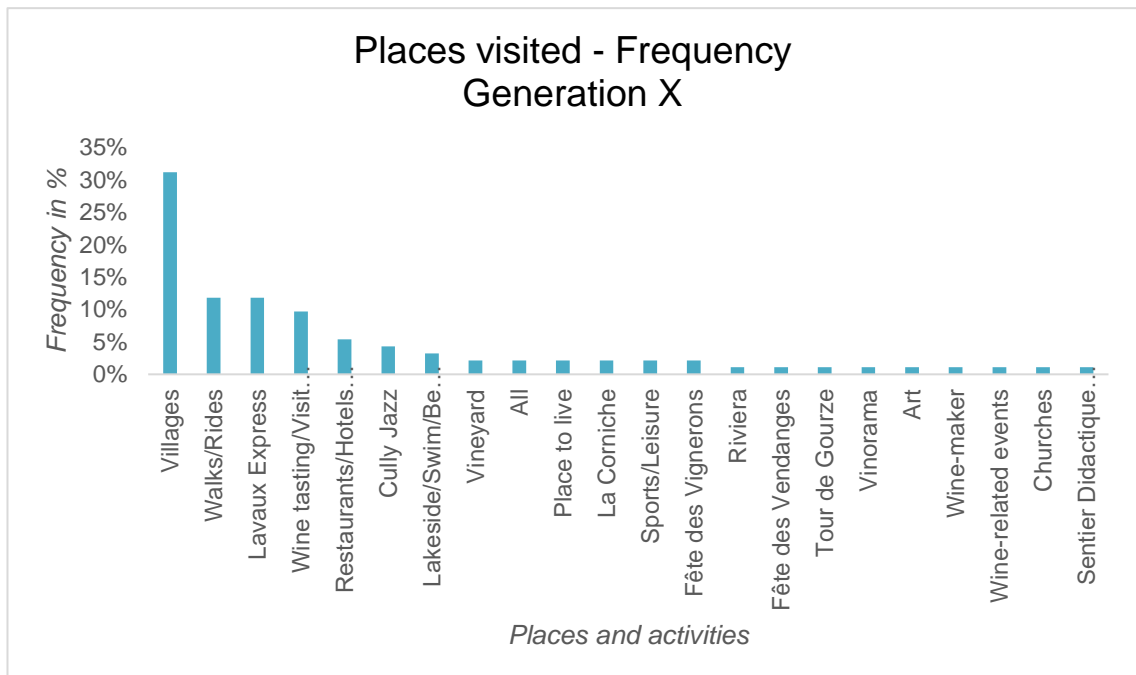


Figure 21 Places visited and activities frequency – Generation Y

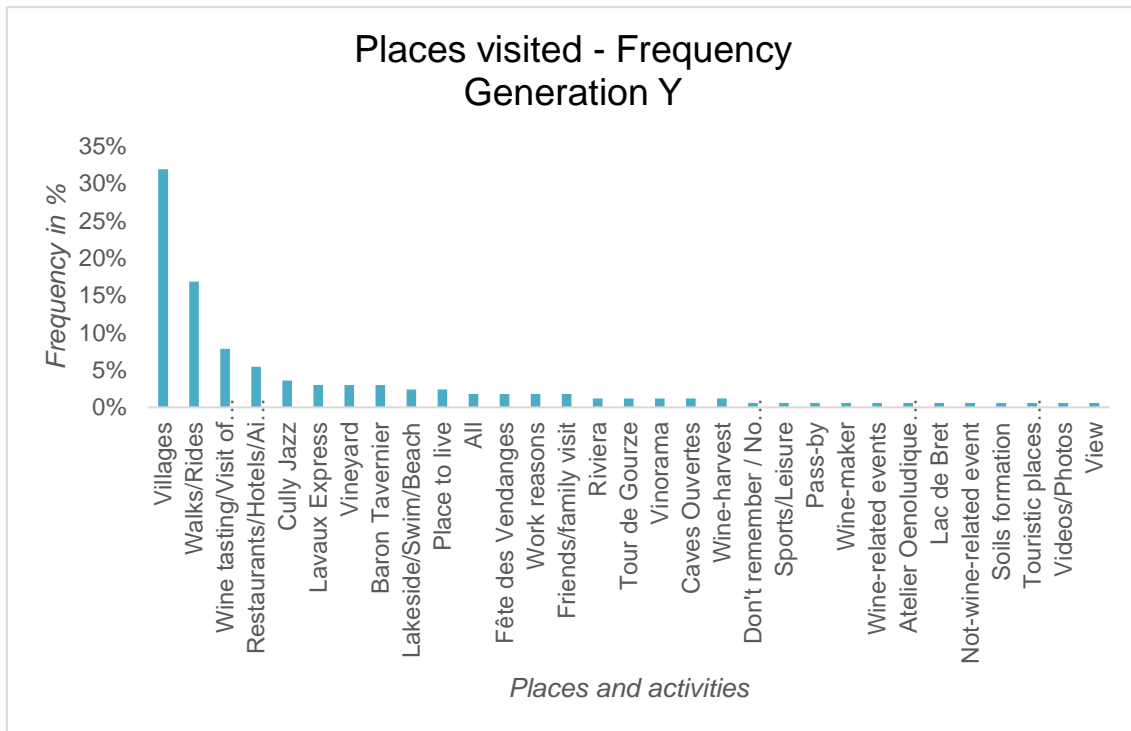
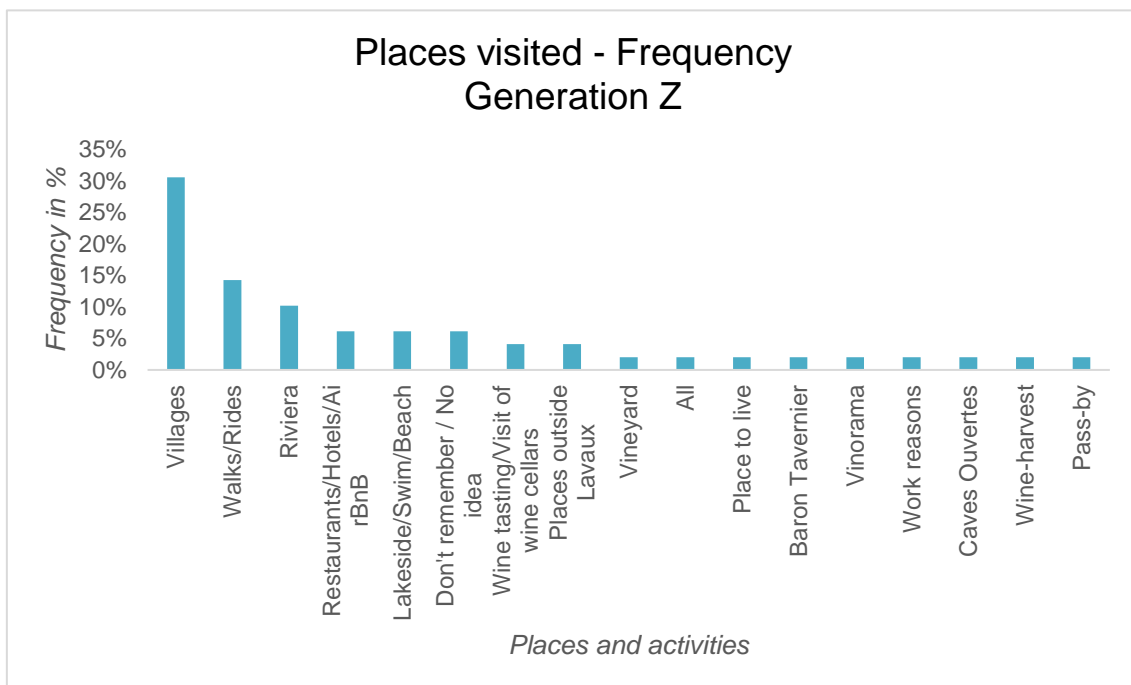


Figure 22 Places visited and activities frequency – Generation Z



Lavaux Express is quite frequent for Generation X mainly, and Generation Y. This could be linked to the fact that parents used to take Lavaux Express with their children, as this activity has a family target as well.

Baby Boomers quoted more specific buildings or infrastructure, such as Château de Glérolles, Corniche and Tour de Gourze. This can show their interest in culture and heritage, which is confirmed with *Art*.

Restaurants and hotels are quite frequent reasons to come in Lavaux, except for Baby Boomers who have a lower frequency in the catering industry. This can be the result of different factors: there might a lower interest from Baby Boomers in going to the restaurant in Lavaux, for mobility and access reasons for instance. This could also be the result of a willingness of this generation to experience a meal in peacefulness, while Lavaux can be busy during the high season. Another explanation can be that the supply drives this tendency: some restaurants, or bars, in Lavaux are, in nature, more appealing for younger generations due to their concept, their location, their layout or their product offering. The assumption retained is that both sides, demand and supply, drive this trend.

Generation X and Y have quite similar interests in their visits, with a mix between specific places, such as Vinorama and Tour de Gourze, lakeside, sports and wine-related reasons, and events, such as Cully Jazz, Fête des Vendanges and Fête des Vignerons which seem to attract people from these two generations only.

Generation Z has a less varied range of activities than Generations X and Y, as they might have had less time to visit Lavaux, or less interest. Their centres or interest are closer to the Generation Y's ones, with a few similarities. Baron Tavernier, for instance, is popular towards Generations Y and Z, probably due to its terrace-lounge "Le Deck", with a concept, at first sight, more appealing for younger generations.

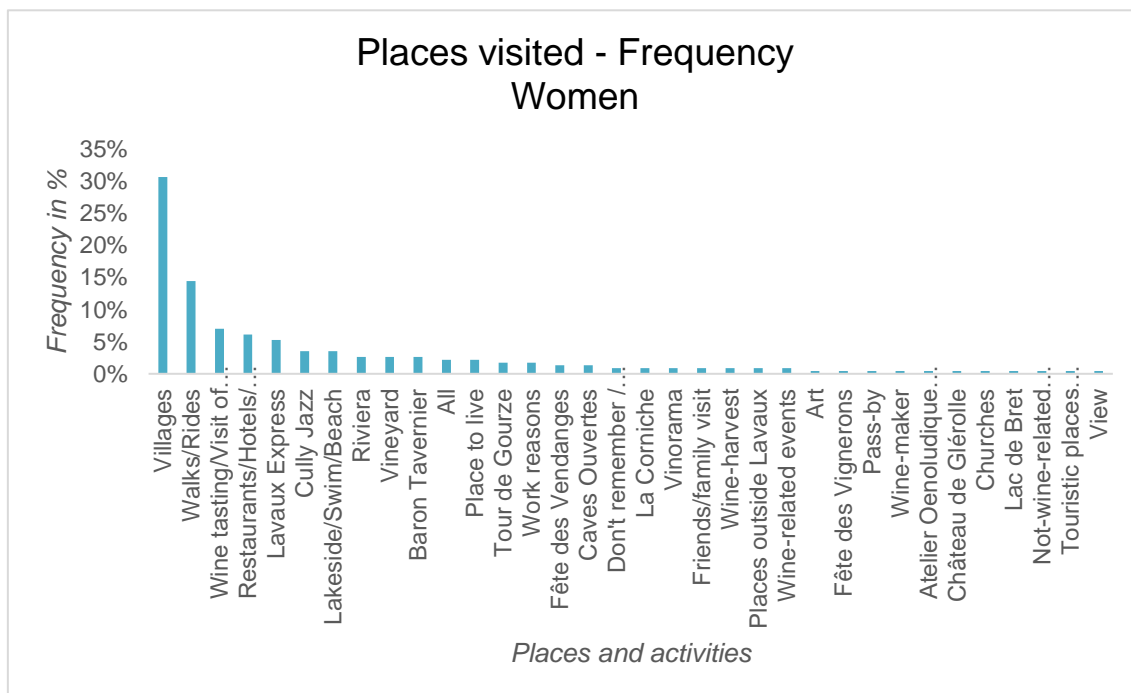
In terms of events, even though some events are intergenerational, Caves Ouvertes have been mentioned only by people born between 1980 and 1995. The other generations didn't mention it, leading to the conclusion that this event attract people between 20 to 40 years old mainly, which is confirmed by the results of the interviews.

To summarise, the main reasons to visit Lavaux don't differ amongst generations. However, there is an evolution, linked to the age, in the interests of the visitors, showing quite clear change in activities and centres of interest over time: older generations are more attracted by arts, specific buildings, while younger are more attracted in the places "to be", as a trend effect, events and catering.

4.7.6 Gender-based segmentation

The gender-based segmentation doesn't display any difference in the first five categories, which leads to the conclusion that the main centres of interest don't change depending on the gender. Also, in the less frequently visited places, there is not significant difference between both. Walks in the vineyard, its villages, wine tastings and catering are common activities.

Figure 23 Places visited and activities frequency – Women

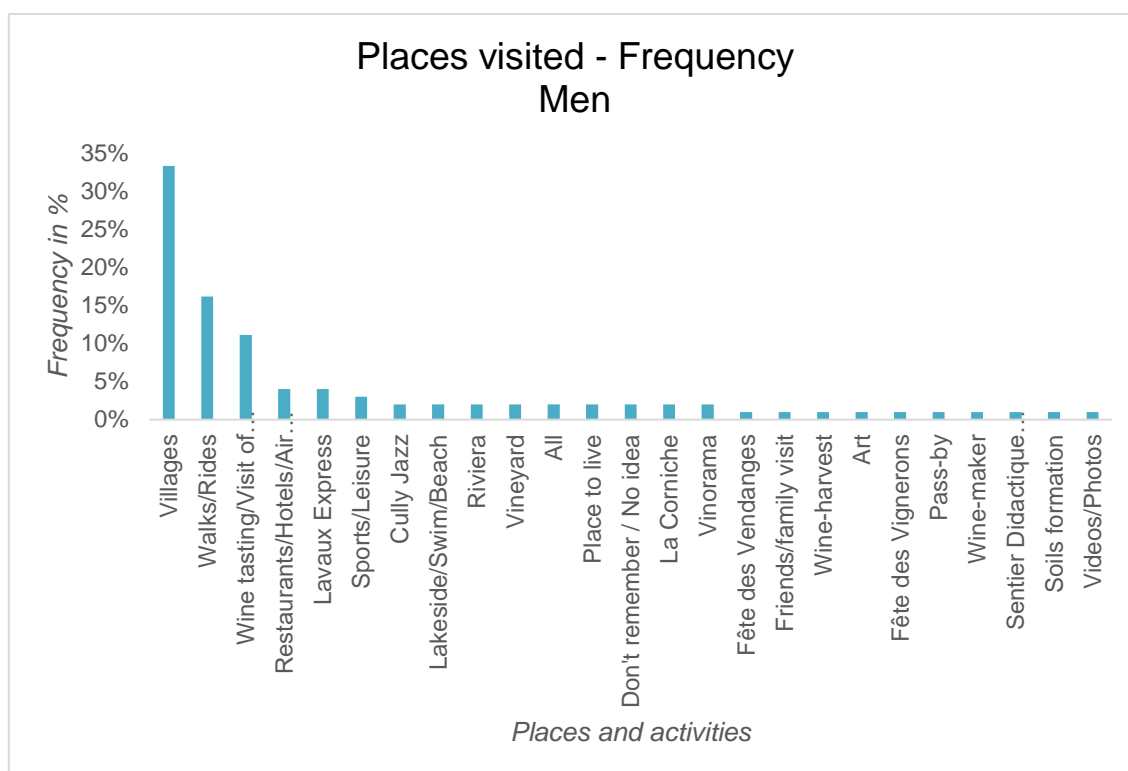


The sports activities are specific to men, while Baron Tavernier specific to women, both being often visited or performed. This can show a difference in interests between both, women enjoying more the lounge aspect, spa and view of Baron Tavernier, men being more active in the vineyard, including the Lausanne Marathon, crossing the south of Lavaux.

Women also show a stronger interest in culture – with art, Château de Glérolles, Tour de Gourze and churches. Also, only women mentioned Caves Ouvertes, while other events are spread between genders.

In the main, gender differences are not strong determinants in the main places visited or activities done in Lavaux. Still, there are clear separations in some areas, such as culture, sport and specific events or places, which attract only one or the other of the gender.

Figure 24 Places visited and activities frequency – Men



4.7.7 Conclusion – Activities and places visited

Globally, amongst all groups, it can be concluded that the main activities in Lavaux – walking, visiting villages, having a meal at a restaurant and tasting wine – are intergenerational, not geographically limited and shared amongst genders. Variations are noticed at lower frequencies, which displays more individual behaviours, leading to the demarcation of each segment compared to the others.

This could let think, that segmented promotion would not be relevant in its absolute, concerning also the few activities or places to visit. The main reasons to come to Lavaux are common and the places and activities adapted to, nearly, anyone.

4.8 Analysis of the definition of UNESCO

4.8.1 Data categorisation

Based on the answers of the participants, a categorisation was established, split into five categories: Culture, Heritage, Uniqueness, Protection and International.

Each answer including of one of these aspects was counted as a mention, which means that each answer can be accounted more than one time. The percentage was calculated in comparison with the number of participants, representing the proportion of people

evoking these dimensions. The exact indication of the word, or its close synonym, had to be mentioned to be considered.

These aspects have been chosen due to their link to Lavaux. Obviously, UNESCO implies many other dimensions, including science and education, that aren't explicitly related to the reasons why Lavaux has been nominated.

4.8.2 Data analysis

The analysis of the data was based on a percentage of participants mentioning the aspects. No specific segmentation has been done in this question, as it didn't seem of high relevance for further use.

4.8.3 Results

Table 2 UNESCO definition - Dimensions

Dimension	Percentage of answers
Protection	51%
Heritage	44%
International	20%
Culture	15%
Uniqueness	6%

The protection has been mentioned by more than a half of the participants when asking what they associate UNESCO with. People link UNESCO with the protection of a site, place, values or heritage, for instance. They probably consider that the main role of UNESCO, or the main benefit of a UNESCO nomination, is the protection over time. Even though protection is one of the UNESCO roles, people tend to systematically associate both, forgetting other important roles of the nomination.

Then, heritage has also been mentioned by a considerable part of the participants. A bit less than half of them consider UNESCO from a heritage point of view. Heritage was often quoted with protection, as both are often associated in people's mind. The UNESCO includes, as a specific branch, the world heritage aspects. This branch is emerging from the cultural role of UNESCO, though, culture is mentioned less frequently

than heritage. People seem to forget the initial basis on which heritage rests, leaving cultural aspects aside. Indeed, only 15% of participants associated UNESCO with culture.

A fifth of the participants consider the international orientation of UNESCO, even though UNESCO World Heritage directly mentions the international dimension. The worldwide aspect doesn't seem as important as it could be expected for the public. This is quite surprising, as UNESCO sites tend to favour tourism. Moreover, considering Lavaux, which was the initial topic of the survey, the association managing the site is named "Lavaux Patrimoine Mondial", which includes this worldwide dimension.

Finally, the uniqueness aspect was only referred to by 6% of participants. Extraordinary, and its French synonyms, and exceptional were also included in this category. As a reminder, to be registered as a UNESCO World Heritage Site, a heritage must be considered as unique and exceptional. However, it seems that people tend to relegate to the background the uniqueness of the sites nominated.

To conclude, people make some relationships between the reasons why Lavaux is in the UNESCO World Heritage List, while putting more importance on aspects that weren't set at the core by the initial Lavaux's nomination project. The culture and uniqueness, though key in the nomination, weren't frequently mentioned, displaying maybe a gap in the main reasons why a place or heritage is part of the UNESCO.

In the dimensions not included in the five categories, some people associated UNESCO with beauty or history, as well as with science and education. Globally, the participants showed, in their answers, that UNESCO is well-known for some of its roles by a large majority.

4.9 Summary of the findings on the demand side

4.9.1 Perception and places visited

The key findings for each segment are summarised in Table 2, to provide an outlook of the values, the places visited, and activities performed while visiting Lavaux. For the perception, the first values mentioned correspond to the themes constituting the central core and the first periphery, reflecting the most shared values. The "change" line represents the contrast area, which shows the potential changes that might happen over time. Heritage includes UNESCO as well, as both are quite linked. Some values appear in both lines, which means that they might become increasingly more shared values among the community. The places visited and activities are summarised on a more

comparative point of view: the first three represent the most frequent places or activities, while the second line reflects the difference of the segment compared to others.

Table 3 Summary of the perception and visits per segment

Segment	Perception	Places visited / Activities
Lavaux Perimeter	Wine-related, heritage, landscape composition Change: uniqueness	Villages, walks, wine-related Lavaux Express mostly local; more precise places
Western Switzerland	Wine-related, heritage, landscape composition Change: beauty of the area, heritage, protection	Villages, walks, catering Tendency to group Lavaux with Riviera; more precise places
Eastern Switzerland and Abroad	Unknown, landscape composition/wine related, heritage Change: global idea, global activity sector, lake	Villages, walks, catering More oriented towards the wine activities and events, vaguer
Baby Boomers	Heritage, landscape composition, wine-related Change: heritage, view	Villages, walks, wine-related More culture and heritage oriented, less interest in catering
Generation X	Wine-related, heritage, landscape composition Change: villages/heritage, uniqueness, unknown	Villages, walks, Lavaux Express Quite various, from wine-related aspects to events
Generation Y	Wine-related, heritage, landscape composition Change: wine-related, protection, unknown, global location	Villages, walks, wine-related More interest in Caves Ouvertes, events, wine-related
Generation Z	Wine-related, landscape composition Change: unknown, heritage	Villages, walks, Riviera Less wine-oriented, more into “places to be”
Women	Wine-related, heritage, landscape composition Change: unknown, wine-related, global idea, positive	Villages, walks, wine-related More oriented towards culture, wine-related or catering moments and events
Men	Wine-related, heritage, landscape composition Change: heritage, uniqueness, positive feelings	Villages, walks, wine-related More sport-oriented, active behaviour in the vineyard

4.9.2 Wine consumption

Table 3 summarizes the results of the analysis on wine consumption, in terms of figures. Each segment is detailed according to the preference given – or not – to a wine variety. As a reminder, “other preference” doesn’t include Lavaux and La Côte’s wines. The

column “UNESCO influence” represents the proportion of participants whose consumption behaviour has changed after Lavaux’s nomination within the UNESCO World Heritage List.

Table 4 Summary of the wine consumption analysis

Frequency of wine consumption	Preference	UNESCO influence
Daily	50% without preference 50% other preference	100% without influence
3-4 times a week	40% without preference 32% other preference	100% without influence
Once a week	71% without preference 16% other preference	100% without influence
Once a month	71% without preference 15% other preference	95% without influence 5% with influence
Special occasions	71% without preference 13% other preference	98% without influence 2% with influence

4.9.3 UNESCO definition

More than half of the survey’s participants associate UNESCO with Protection, while nearly a half of them link UNESCO with Heritage. The other dimensions are considerably less frequently mentioned, ranging from 20% or less.

These results confirm a global knowledge about some goals of a UNESCO nomination, while displaying an oversight of some more detailed values reflected by a UNESCO nomination.

5. Supply side – Promotion

This chapter provides a deep analysis of the promotion done by different actors in the area. The inclusion of various profiles in the interviewees panel allows to have a 360° view on the promotion done. This chapter is introduced with the data collection, participants and analysis methods. Then, the results are grouped in section 5.4, categorised into nine dimensions: promotion organisation, offer, targeting, visitors' typology, periods of visits, promotion tools, values, UNESCO impact and areas of improvement. Finally, the last section applies the economic principles to Lavaux.

5.1 Data collection

The data collection for the promotion part was performed from 2nd April to 18th April 2019, during face-to-face or phone interviews, in French. The main themes addressed during the interviews didn't vary, however, the questions were tailored to each participant, conducting to a discussion to allow participants to develop their answers with more detailed information. No recording was made, considering the willingness to have an insight into the promotion in general.

Synthesis of individual interviews are available in Appendix 7. The full interview notes aren't included in this report.

5.2 Participants

Interviews' participants were selected according to their implication in the promotion of the area or their recognition as frequently visited places in Lavaux.

Therefore, the decision was made to interview wine makers active in wine tourism activities or with a strong promotional orientation. In relationship with wine, wine tasting places were also considered as relevant promotional actors, as well as Vaud Oenotourisme, the entity supporting wine tourism in the canton.

For the touristic aspects purely, local and regional tourist offices were interviewed, enabling a deep understanding how tourism, local and international, was promoted. Also, it helped having information regarding the strategy in place to promote the area.

The UNESCO-side being crucial in Lavaux, the inclusion of entities having worked or being currently active in the application of principles linked to UNESCO was necessary.

Finally, two actors frequently welcoming local and international tourists were interviewed, one offering an activity in the vineyard, the other being a well-known hotel-restaurant.

Both were frequently mentioned in the places visited by the survey's participants, confirming the choice of these two interviewees.

The full list of participants is detailed in Appendix 8.

5.3 Analysis

The analysis of the promotion was based on six aspects addressed in the interviews. This allowed to have a multi-dimensional approach to provide a complete analysis of the promotion of the area.

Figure 25 Promotion dimensions



5.4 Results

5.4.1 Promotion organisation

From an organisational point of view, Lake Geneva Region Tourist Office³ represents the 13 destinations in the canton. They help the creation and development of touristic offers and position the destinations on Swiss and international markets. Lavaux is located on the territory covered by Montreux-Vevey Tourisme, also named Montreux Riviera. They are, therefore, responsible for the global touristic promotion of the area itself. At the level of individual actors, such as wine makers, hotels, or activities providers, there is no specific guideline imposed by the tourist offices. They are free to promote their business how they wish. The question of an imposed promotion image will be discussed in section 7.1.

The current collaboration amongst promotion actors in Lavaux has been described as efficient. Compared to the previous years, an improvement has been noticed, in the sense that individual actors tend to provide a more collective effort in terms of promotion than in the past.

Globally, the organisation of the promotion of Lavaux appears as accurate in its current state and allows the development of the touristic offer in the area. The responsibility of the tourist offices in terms of promotion outside Lavaux's borders is, probably, the relevant strategy to ensure a consistent image of the area. Also, the absence of precise guidelines or values to promote suits well the different actors, who don't think having mandatory values would improve the promotion. Moreover, as this will be described in the values section of this chapter, the current values promoted, in their nature, are very similar. The potential benefits of branding, and the microeconomics aspects related to collaboration will be developed later in the report.

Over the years, the evolution seems quite clear: starting from local businesses, by reaching in the end an international cover. In its press report 2019, Vaud Oenotourisme describes it quite clearly:

Five years ago:

« Faire du canton de Vaud une destination oenotouristique à part entière reconnue à l'échelle nationale, puis à l'échelle internationale. »⁴.

³ In French, Office du Tourisme du Canton de Vaud

⁴ Translation: Make the canton of Vaud a fully-fledged wine tourism destination recognized nationally and then internationally.

Today:

« Faire de la Suisse une destination œnotouristique à part entière reconnue à l'échelle internationale. »⁵

5.4.2 Offer

The current offer is quite well-developed, mainly around the wine business. The activities have diversified over time, offering more opportunities for visitors to spend time in Lavaux, going from wine tasting, events, walks, guided tours or train tours.

Many of the interviewees mentioned the change in the offer over time: welcoming structures and spaces have been created, the infrastructures have been adapted to correspond to the trends and market demand and wine makers have diversified, as wine sales only can't be relied on anymore. The aspect of digitalisation and the ability of speaking other languages have also increasingly gained in importance. Both, as well as reactivity, are crucial factors to attract visitors and customers.

The orientation on local products, authenticity and traditions are main components of the current offer, which rests on the proximity of the customers as well. This goes along with the strategic domain "Art de Vivre" defined by Lake Geneva Region Tourist Office, in which Lavaux is categorised.

In the development of the offer, the opening hours for wine experiences are of main importance: visitors and customers need wide opening hours, which are a considerable advantage on the market. The ability to welcome visitors in the evenings and weekends represent an important part of the offer. Recently, the creation of groups of wine makers, such as 11 Terres, in Epresses, allows visitors to access wines and local products over a large time range. The development of such structures is necessary in the next years, to satisfy the market demand.

Another gap in the offer that has been mentioned by several interviewees concerns the family activities. Even though close cities, such as Vevey and Lausanne, have a wide range of family-oriented activities, Lavaux, especially in the activities related with wine, isn't attractive for families with children. Some turns have been taken by wine makers, for instance suggesting apple juice or syrup tasting, but it concerns only a few providers. The fact, whether to include children in wine-related activities, is questionable. Indeed, this can be an opportunity for couples, individuals, or group or friends, to meet without

⁵ Translation: Making Switzerland a fully-fledged wine tourism destination recognized internationally.

their children, to keep an activity on their side. On the other hand, including families in wine-related activities can help develop the market, increasing the popularity of the area towards different target groups. A good balance should be found, to ensure the most interest groups are satisfied.

Strategically, one of the goals is to promote experiences. This goes from experience packages, offered by Montreux-Vevey Tourisme, but also through events, such as Caves Ouvertes for instance. This last has become increasingly more successful over time, and corresponds to a market demand, especially from younger customers.

As mentioned by Mr. Stucki (2019), the strategy aims more at a preferred tourism⁶, avoiding mass tourism and favouring a specific interest in the area. This will go through a focus on the quality of the offer, the unique experience proposed, to stand out from other destinations. Ms. Porchet (2019) mentioned that people know what to expect in terms of view and landscape. A main point to consider is that the visitors will need to be, somehow, surprised by other factors, such as the quality of services, or unique products and experiences.

5.4.3 Targeting

In the promotion itself, there is no specific targeting depending on the age or the gender of the visitors, even though there tend to be tendencies in the interests or behaviour of each group, which will be developed in the visitors' typology's section.

Lake Geneva Region Tourist Office adopts a tailored approach for the countries targeted, when developing offers. They know, for each country, what centres of interest will work well, and therefore adapt the products suggested for them.

Montreux-Vevey Tourisme has, naturally, a set of activities to suggest to families when visiting the vineyard. The information provided to this group when visiting the office is less oriented towards purely wine-related activities, aiming more at activities adapted for children.

Lavaux Patrimoine Mondial, on its side, adapts its approach depending on the group: communes, Swiss Confederation or universities, for instance. This ensures that the goal aimed by approaching these groups is reached efficiently.

At the level of smaller entities or wine makers, there is usually no targeting at all in the promotion. Mr. Massy (2019) mentioned, on his side, performing targeted promotion

⁶ In French, "tourisme de prédilection"

when they have a coming presence in the German part of Switzerland, or, for instance in Japan, with expatriates.

Generally, targeting is therefore done at a large group level, and no individual targeting is performed. The nationalities or geographical locations, and the role of the interlocutor have an influence on how the offer is promoted, to ensure a relevant marketing strategy. An important factor to consider is that many actors of promotion in Lavaux are small entities, apart from the tourist offices, and, therefore, the benefits of specific targeting would probably not cover the costs implied by a tailored strategy. Also, there is a risk that a specific strategy might benefit more other entities, linked to the externalities issue. At a cantonal level, the targeting by country seems relevant at this stage. At all levels, an age-based targeting could bring more precision in the promotion, especially in the interest of each generation.

5.4.4 Visitors' typology

The visitors' typology mentioned by the interviewees was consistent and coherent among different actors.

In terms of nationality, internationally, Asian visitors represent a large majority who, as Indian tourists, usually visit the vineyard in large groups, via tour operators. Individual international tourists' nationality varies, with, quite frequently, Dutch, North American, English, German, Italian and French visitors. Recently, an increase in South American, New Zealand and Australian visitors has been observed. In the past, international visitors were nearly inexistent. Over the last decade, maybe in link with UNESCO, their number has increased exponentially, according to the interviewees' observations. The UNESCO aspect was probably the main factor in the coming of Asian tourists, who tend to favour UNESCO's site-to-site tours in Europe, in which Lavaux has been included.

In parallel, there is an important part of Swiss visitors, local or from the German part. Lavaux Patrimoine Mondial registered a majority of Swiss visitors in their guided tours. All the interviewees highlight the fact that Swiss German constitute an important customer group. They are described as very faithful customers, who tend to buy large quantities of wine. Their interest for Lavaux has been present for a long time, perceived sometimes as a tradition. Therefore, the ability to speak German is crucial in the development of the touristic offer. This point might be sometimes lacking by some considerable actors in the vineyard.

In terms of age, wine-related activities attract, globally, customers between 30 to 60 years old, with smaller or larger ranges mentioned by some interviewees. Women tend

to participate to wine-related activities outside maternity age, before having children, or once their children are independent. In the same idea, young couples' visits have become more popular recently. Over the last years, the interest in wine shown by young adults has increased: they discovered the art of tasting wine, leading to a decrease in the average age of customers. The event Caves Ouvertes, for instance, tends to attract increasingly younger customers, who usually come as part of groups of friends. On the other hand, wine tasting purely, outside events, seems to correspond more to customers between 40 to 50 years old, usually people with more financial means.

Some other activities, such as Lavaux Express, are more attractive for families with children. Parents and grandparents with children are therefore representing a majority of the customers, while individual tourists tend to be younger.

Gender-based, there is no clear difference between men and women. However, over the last years, an increase in interest from women, outside maternity age, has been noticed.

Regarding the behavioural aspects and centres of interests, visitors favour short stays in Lavaux, ranging from one to, maximum, four days. The majority is closer to one than to four days. The typical visitor is "walker-visitor", enjoying the different paths suggested in Lavaux, and sometimes adding a wine tasting. Older visitors tend to be more interested in the cultural background of the vineyard, which is sometimes forgotten by younger visitors.

Globally, there are different groups of visitors, ranging from the international tour operating visitors, to young local couples, and older wine enthusiasts. The only visitors' type that seem a bit apart, is families with young children. This is linked to the nature of the activities related to the vineyard, the result is then not surprising. Outside this group, it can be concluded that anyone with an interest in wine or in heritage, are frequent visitors.

5.4.5 Periods of visits

The number of visitors in Lavaux is highly weather-dependent, and, therefore, season-dependent. The high season, globally, ranges from April to October according to the majority of the interviewees. In winter, only few local people visit the vineyard, while international tourists are close to inexistent at that time of the year.

Weekends and holidays periods attract the most visitors, local and international. During the week, there are some customers, for afterwork drinks for instance. However, this is a minority compared to the total number of visitors.

Mr. Stucki (2019) suggested an improvement to this decrease in visits in winter, by, somehow, moving wine tourism to mountains, which are attractive for local and international tourists at that time of the year. This can be by offering wine tasting in ski resorts or creating experiences with products in touristic places all-year-long. Though, this is mainly product-based, not leading to an increase in visitors in the vineyard in winter.

This is true, that walks in the vineyard during cold months might not be attractive for visitors. Moreover, some activities are not proposed outside the high season. Also, other events, such as Christmas markets, are more promoted by tourist offices, which is, strategically, obvious. This could be interesting to see whether organising specific events, such as a one or two-day Christmas market in a village, could increase the number of visitors at that period of the year.

5.4.6 Promotion tools

Mr. Stucki (2019) describes Lavaux as a “Unique Selling Proposition” in itself. The offer in Lavaux should be a powerful promotion tool, no matter how intense the promotional campaigns are. Therefore, the offer itself must be attractive at first, before considering the promotion around it.

In terms of means, the importance of digital marketing has been understood by the majority of the interviewees. While some still use paper ads or direct mailing, all of them run a website, have social media accounts, which are developed up to certain points. The online presence is necessary to attract individual customers, whose main source of information is the internet.

Prospectus are still important, especially for tourist offices, where visitors tend to go to get information on what to do in the vineyard. They can be displayed in hotels, impacting the international customers. Also, Ms. Porchet (2019) underlined the efficiency of editorial promotion, through storytelling for instance. This goes along well with the idea of experience marketing, storytelling allowing people to realise what they are going to live while in the vineyard.

Influencers have, recently, become increasingly important in promotion, including for Lavaux. Ms. Porchet (2019) highlighted that the presence of an influencer, or the shooting of a movie in the vineyard, could convince people to visit Lavaux. This is true, today, that influencers have an exponential power on people’s attitudes. However, even though they can bring new customers, this might not be aligned with the preferred tourism aimed for Lavaux.

For wine-related activities, word-of-mouth is extremely powerful. People might go to some places to taste wine, and, if they enjoyed the experience, will come back with other people. Locally, this is a crucial tool in terms of promotion, resting on the quality of the service provided.

Lake Geneva Region Tourist Office holds a media and business role, meaning that they are in charge of answering media requests, journalists visits, and relationships with tour operators for instance. This seems the most efficient way to ensure these relationships, to provide a single point of contact internationally.

Outside Lavaux's borders, tourist offices and hotels play a role of intermediary for individual entities. They allow international tourists to have, first, a global idea of the area itself, and, once on site, allow visitors to have access to specific information in a single place. This is also valid for Swiss-wide promotion, reaching Swiss German or Swiss Italian visitors.

Regarding events, in the vineyard or outside, they are useful in the promotion as well. Lake Geneva Region Tourist Office participates to events and fairs abroad, mostly professional, to gain an international reach. These fairs are important in the development of offers, with travel agencies and tour operators. In smaller entities, the participation to fairs at a local level isn't really popular. However, the presence at events in the German part of Switzerland is crucial and attracts customers. Indeed, this segment used to have time to come in Lavaux and buy wine. Over the last years, due to the global trend in increase of activities of individuals, they might not have enough time to come to Lavaux to purchase. This seems, therefore, important to adapt to this and meet them where they have enough time to go. Events happening in the vineyard, such as Caves Ouvertes, Epesses en Fête, for instance, are beneficial depending on the mindset of the wine maker. Indeed, the success will depend on the effort put into welcoming visitors, so will their potential future purchases.

Finally, partnerships play an important role in promotion at different levels. For instance, some entities perform sponsoring for local events, in exchange of some promotion. This allows to add visibility to the business. Also, partnerships with restaurants or events, to display local wines, help developing the market. This work has to be performed upstream, including a strategy of product positioning. Another aspect is the collaboration with partners for international promotion. For instance, Mr. Massy (2019) mentioned the collaboration with partners to develop their sales abroad, which is beneficial as partners are located in the country, they know the market and are more efficient in the development of the offer.

To summarize the promotional tools, the digital aspect is crucial today, due to global trends. Though, other means need to be considered, especially in terms of collaboration with partners, influencers, journalists, which can add visibility to the area itself. Also, the image given at events or during wine tastings plays a consequent role in the renown of each entity and, therefore, should be carefully prepared and worked on.

5.4.7 Values

As mentioned previously, no specific guidelines or imposed values are set up for the promotion of Lavaux. Some themes are suggested each year, for instance with bike, which was, one year, a theme suggested by Lake Geneva Region Tourist Office. Each actor can therefore promote their business as they wish.

Globally, all the actors highlighted the same aspects to promote, which are the traditions, the locality of the products and the experience. This includes the family aspects of the wineries, the products' quality, the "terroir" - or local products, in English - the proximity, friendliness and the need to relax and to get fresh air. Also, the pleasure, the enjoyment linked with the products have been mentioned, and go along with the "Art de Vivre" strategic domain of Lake Geneva Region Tourist Office.

In addition to these intrinsic values, the area's beauty has been mentioned as well as an aspect to promote. The landscape diversity and the view allow visitors to escape for a while. The landscape is, however, much more present on the websites of each actor, than actually mentioned in the interviews. This can let think that the view on Geneva Lake is the most attractive image for visitors, while the interviewees mentioned the increasing interest for this locality and proximity of products, combined with the idea to be closer to traditions. A mismatch could be present, in the values that promotion actors display at first sight, compared to the actual values they aim at highlighting.

Aspects linked to UNESCO are also part of the values that need to be promoted, including exceptionality, heritage, history, culture, geographical composition and interaction. However, these values tend to be forgotten by tourists or visitors, especially internationally. What is behind the heritage would deserve a greater attention from different actors and tour operators. Also, giving to cultural aspects a place of choice in the promotion of Lavaux could attract more visitors that are looking for this kind of unique heritage, which matches the idea of preferred tourism.

To summarise, the values to promote are consistent and aligned amongst actors. However, the values that seem most important are not necessarily the ones that are the most highlighted. As mentioned by Ms. Porchet (2019), visitors know what to expect

when coming to Lavaux, since the landscape is well displayed. The other values are then crucial to surprise visitors, to add value to the tourism in the area. Also, Vaud Oenotourisme, in its press report 2019, highlights the sustainable development aspect that needs to be considered. This can be included in the values promoted, as a destination corresponding to sustainable principles in general.

5.4.8 UNESCO impact

All the interviewees agree on the fact that the UNESCO nomination has had an impact on the number of visitors. An increase after the nomination of Lavaux on the World Heritage List happened and then stabilised.

The visitors' internationalisation can be linked to UNESCO directly. The tour operators included the destination on their list, the interest for Lavaux rose. Transit tourism, or "tourisme de passage" in French, has increased as well.

Considering the expansion of the number of visitors, the tourism demand has increased, leading to the development of the touristic offer. This can be considered as a positive impact, as this led to improvements in welcoming structures and innovation in the activities proposed.

Economically, the changes are less obvious. Even though tourism has probably led to an increase in revenues for hotels, restaurants or other touristic activities, wine sales haven't evolved with the UNESCO nomination. The exact economic impact of the UNESCO nomination in terms of wine sales can't be assessed with the amount of information at disposal. Indeed, a deep economic analysis would be needed, comparing the trends in sales with and without the UNESCO factor.

Globally, the UNESCO has had an impact on Lavaux, which is not considerable but still present, mostly on the number of visitors. Also, the new international recognition was expected, as mentioned by Mr. Vallotton (2019). This has led to development of international tourism, which was nearly inexistent in the past.

5.4.9 Areas for improvement

During the interviews, some issues in relationship with the promotion of tourism were mentioned, as well as areas for improvement.

The biggest handicap of Lavaux internationally is, according to Mr. Vallotton (2019), the lack of unity and coordinated offer amongst actors. This has also been mentioned by other interviewees. Over the last years, there has been a considerable effort on that

point, for instance by Vaud Oenotourisme, which tries, at first, to gather individual wine makers, to be able to develop a coordinated offer for the area. This takes time and requires common effort and motivation to reach the goals. Ms. Rochat (2019) also underlined the lack of “emblem” grouping inhabitants, visitors, communes, wine makers in the vineyard. This missing cohesion could be worked on to improve the global promotion of the area. On the other hand, Mr. Vallotton (2019) highlighted that, for the wine, it wouldn’t be efficient to bring all the varieties under a same name, comparing “Vin de cépage” with “Vin d’appellation”. This aspect was shared amongst actors, and, even though it could be beneficial at some point internationally, the efficiency is not proven, and the impact locally might not be positive.

The opening times of wine tasting structures have been improved recently but still need to evolve. In the past, visitors faced closed wineries, that it be outside business hours or in the weekend, which is understandable from a wine maker’s point of view, due to the workload the rest of the time. Over the last years, new places to taste wine have emerged, which correspond to the market demand. Visitors can find a few places to taste wine when walking in the vineyard, without previous booking. Also, the online calendar of Lavaux Patrimoine Mondial allows them to know which wineries are open at specific times of the week.

Explanations boards in each village are also an improvement suggested and is currently worked on. These boards could include information on how to behave in the vineyard, especially considering that the vines are private properties, information on where to taste wine, on the history of the village, or any other useful information. The education of tourists is needed. They might not be aware of the work done by wine makers, the fact that taking grapes is illegal and of the good recycling practices, for instance. Information boards could answer this need.

Mobility in the vineyard is also a point where improvement can be made. Public transportation exists and is well-developed between Vevey and Lausanne. However, once in the vineyard, going from one place to another might be complex, besides walking or driving. The goal is not to increase the traffic in Lavaux but developing sustainable ways to commute within Lavaux, for instance with bike or e-bikes renting, or public transport between places in the villages. Another solution could be similar to what is offered in Franschhoek Valley, South Africa. In this vineyard, a hop-on hop-off tram and small buses give the opportunity to visitors to travel between wine tasting places, according to their wishes. Even though Lavaux Express already includes a wine tasting train in its offer, this is not as successful as expected. The hop-on hop-off solution would

allow more freedom to the visitors. Indeed, instead of bringing customers to one cellar, they would have the possibility to choose where they go and at which rhythm. The transit of large coaches is not aimed at, and even not possible looking at the configuration of some roads and villages. Also, a coordinated transport offer between Montreux and Lausanne could be developed, as each tourist office suggests public transport offers that don't cover the whole vineyard, leading to gaps in the global offer.

Another point mentioned concerns the Swiss German customers. They know Lavaux quite well now and even though they are described as faithful, they recently started to interest in other vineyards in the canton, which changes from what they were used to. The interviewees mentioned that they were an important target group, buying large quantities, it seems therefore crucial to sustain the promotion effort towards this group. It starts with the improvement of German speaking in the vineyard, which was identified as a gap.

Regarding the stay itself, its length could be extended. This goes through the promotion, by suggesting how longer stays can be spent in Lavaux, what activities can be taken, proving the visitors that there is more to see than in one day. The development of the offer in that sense will allow to reach this goal.

Also, the period when visitors are present could be worked on. At the moment, high number of visitors come in summer and in the weekend. The promotion of the winter in Lavaux, the development of an offer for that time of the year, could be a first step in that sense. Also, an emphasis could be made on afterwork activities in Lavaux, to attract more people to come in the week rather than the weekend. This would have two effects: first, to spread the number of visitors among periods of the year, avoiding crowds which start to cause issues at the moment. The second effect would be the increased attractiveness of Lavaux for local people, with afterwork moments, allowing to create a specific offer for this target group.

Finally, an important point underlined by some interviewees is the sustainability of the heritage. Wine makers are the people who keep the heritage alive, by working the vines, caring about the walls, ensuring that the business doesn't damage the heritage. In the past, generations of wine makers succeeded each other over time. Today, it is important that wineries keep working, that they are transmitted to new generations. To sustain the heritage, the wine activities in the vineyard, an awareness needs to be present in younger generations' minds. Also, wine making practices should be promoted in their traditional aspects, so should wine-related jobs.

5.5 Economic analysis

5.5.1 Stakeholders' costs and benefits

From an economic point of view, the question lays in who pays the costs and who receives the benefits of the promotion of Lavaux. To analyse the situation, the impact of five stakeholder groups' promotion on the others will be described in the following paragraphs.

5.5.1.1 Wine makers

Wine makers' pay for their own promotion, which represent the costs for them. In parallel, if their promotion is efficient, they will receive the benefits of it with an increase in customers and sales. Their promotion could also have an impact on the benefits for other stakeholders. Indeed, the increase in customers, if visiting the vineyard, can be profitable for touristic activities, wine tasting places and other wine makers. This would go along with the idea of promoting globally the vineyard, though, with having a slightly negative impact on the wine makers' own promotion. The goal should be to ensure the promotion of the specific wine makers' products, by having them standing out, while promoting the area as a whole. This would, on the one hand, secure the revenues for the wine makers, while globally be beneficial for the knowledge of the area.

5.5.1.2 Wine tasting places

As wine makers, wine tasting places cover the costs of their own promotion. Though, the situation is slightly different: wine tasting places offer wine makers' products, meaning, indirectly, that the promotion will benefit wine makers as well by increasing the knowledge of their products. Also, the increased knowledge in the area brought with the promotion done by wine tasting places benefits any actor.

The role of wine tasting places in promotion needs to be carefully established. The services, rather than the products, should help them stand out from competitors and have their own identity. They will, by promoting their services, ensure that people associate the promotion with the wine tasting place itself rather than with a group of wine makers. In parallel, the benefit for the whole area will root from the enabling the discovery of local products and from the increased interest in Lavaux. The promotional strategy needs to be carefully designed to avoid the wine tasting places to be relegated to a second place in their own promotion.

5.5.1.3 Touristic activities providers

Touristic activities providers, such as Lavaux Express, also pay for the costs of their own promotion. They can hardly be impacted negatively by other stakeholders in terms of promotion. The benefits, on their side, should go to them directly, or shared with other stakeholders depending on the partnerships. For instance, Lavaux Express promotes the Train du Caveau. This activity implies the stop by a wine tasting place, meaning that the promotion done by Lavaux Express will benefit these places as well, helping to increase their popularity. Though, these last can't be considered as direct competitors for Lavaux Express, as they offer different activities. As the range of activities within Lavaux, apart from wine-related activities, is quite small, promotion can hardly benefit another activity. This means, that the promotion effort would benefit the touristic activity provider directly, while increasing the interest for the vineyard in general.

5.5.1.4 Restaurants and hotels

Restaurants and hotels have a strong stake in the promotion of the area. Firstly, they can benefit from the image and activities provided within the vineyard. A poorly developed image or activity offer can discourage people to visit the vineyard. Also, their promotion and offer are crucial in the global promotion of the area: without restaurants and hotels, visitors can be prevented to visit Lavaux. This means, that hotels and restaurants, of course, support the costs of their promotion, but also benefit from it, and from the promotion of other actors as well. A hotel might attract some potential tourists, which, after searching more over the area, orient towards another hotel. This can be a burden for the hotels, considering that the promotion costs should imply direct benefits in terms of number of customers.

To ensure the promotion of their institutions is bringing more benefits to themselves rather than to others, they should, of course, highlight the area as a whole, but stand out with a unique selling proposition. This would be beneficial for Lavaux, while bringing them the targeted visitors.

5.5.1.5 Tourist offices

Tourist offices provide tools for promotion and help the recognition of the area outside its borders, amongst other activities. Their role consists more in the support of the different offers within the vineyard. In that sense, the promotion costs can be high for them, compared to the benefits. They don't necessarily sell products, apart from packages and experiences. They are probably the ones aiming more at the global goal of having a broad promotion of the vineyard, being highly representative of the collaboration to promote a common offer.

Tourist offices don't really have direct benefits in promoting their own business. They represent an area as a whole and must equally promote different places within these areas. Also, they are conscious of the positive impact of helping the promotion of other places as well on a regional level, to enable the development of each individual area.

5.5.1.6 Global interaction amongst stakeholders

As detailed for each stakeholder group, the global image promotion can be beneficial in all sense. Though, this is crucial that each entity still keeps its own identity, which sustains the diversity of providers within the area. The promotion should be carefully developed, with, on the one hand, the global image promoted to attract the right visitors in the area, and, on the other hand, the unique proposition of each provider, within this broadly promoted area.

This would imply more benefits than costs for each entity. After this analysis, the idea that a purely global promotion of the vineyard wouldn't be beneficial is confirmed. The individualities need to be kept, to ensure the revenues go to the right actor. The global promotion has its importance as a first step, potentially through branding, detailed in section 7.1, while tailored promotion must happen as a second step.

The objectives of each group seem aligned, according to the interviews. All actors have the same idea of how promotion should be done, and what aspects should be highlighted. Also, they objectives are not rival in themselves: they all aim at having their products known which is obvious, while ensuring Lavaux's image is correctly promoted as well. Their individual interests tended to be more important than having a global promotion to increase the recognition of Lavaux and its products, but a shift is happening towards an understanding that a common effort benefits each actor. The important point to highlight is that individualities aren't meant to disappear. This is even the contrary, as they form the richness of Lavaux. Once the actors have well-received the message, they might all be going in the same direction as a coordinated group.

5.5.2 Lavaux as a common resource

As mentioned in the theoretical concepts, Lavaux is, in nature, a common resource. The potential externalities arising from the promotion of different actors have been described in the previous section, leading to the analysis of the management of the vineyard as a common resource.

In that sense, one of the roles of the government in the management of Lavaux as a UNESCO site concerns the protection of landscape and heritage. Public entities assess

the real impact of new infrastructures, roads, buildings, before allowing them to happen, for instance. The decisions of the regulatory bodies prevent the destructive development of the area.

The state authorities, that it be at a communal, cantonal or federal level, also have costs and benefits resulting from the activity in the area. The costs can be considered, mainly, as being the maintenance of the public infrastructure within Lavaux, the administrative entities and the security. In parallel, the benefits can be linked to the popularity of the vineyard, the economic activity in the area, the tourism revenues contributing to the gross domestic product, amongst others. The vines, the villages are maintained by inhabitants and wine makers, so are the traditional walls in the vineyard.

For the site in its entirety, negative externalities can concern an excessive economic activity, leading to the destruction of the landscape and to an overcrowded area. Also, another example could be the pollution in the vineyard, due to the number of vehicles related to the increase in popularity. In terms of positive externalities, the popularity of the vineyard, after the UNESCO nomination, for instance, could favour the tourism in the whole canton, or country. Also, it could provide producers with an increased interest in their wine, without them to have to review all their activities. These are examples of what kinds of externalities could exist, with the increase in recognition of the area. There haven't necessarily realised and shouldn't be considered as facts, as a detailed economic assessment, based on figures, hasn't been performed.

To avoid these global negative externalities to realise, a common effort seems the most appropriate. Indeed, a strict regulation or tax to avoid the area to become overcrowded or highly polluted wouldn't seem of any relevance. On the contrary, the right message given by the different actors, with the actions going along with the message, would probably be more impactful. For instance, soft mobility can be highlighted to visit Lavaux from the nearby large cities of Lausanne, Vevey and Montreux. This would avoid, on the one hand, the increase of cars in the area and, on the other hand, the increase in pollution. Infrastructures already exist, which means that a high focus on orienting tourists to come to Lavaux by train should be sufficient. Also, the avoidance of creation of new parking spaces – which seem numerous enough for the needs of the usual economic activity – can prevent the visitors to have incentives to come with their cars. Regarding the destruction of the landscape, the right behavior needs to be taught to visitors, as suggested in the areas of improvement in section 5.4. The authorities can bring their help for that, by enabling the relevant realisation of explanations boards. This can incur a cost for them, in the sense that it would require material and workforce, to a

small extent. Though, the preservation of the heritage and the sustainability of the economic activity over time will be much more beneficial in the end.

The association Lavaux Patrimoine Mondial already aims at achieving this goal of protection, sustainability of the heritage over time. Due to the representants within the association, they can act as a sort of consortium, which aims at grouping the interests of many stakeholders, ensuring each of them is oriented towards this common goal. Their role is therefore crucial to avoid negative externalities and to ensure the right behaviour is adopted within the activity of the vineyard.

Regarding the promotion of Lavaux, there is, currently, no explicit agreement amongst private entities or government intervention in the promotion of Lavaux. Even though, globally, the promotion is aligned in terms of values and strategy, each one is free to promote its business as they wish, which means that it might be hard to prevent the issue of free riding.

In addition to the common goal of heritage protection, the interests of each economic actor in terms of promotion could be grouped to avoid negative externalities. In the case of Lavaux, a partnership between public and private entities seems relevant. Indeed, the private entities have an interest in the promotion of their own business, while the local and regional authorities might see a potential of economic growth through increased economic activities.

To realise such partnership, branding can help and might be decided within the activities of Lavaux Patrimoine Mondial association. The recommendations regarding the branding strategy are developed in further details at section 7.1. The label Lavaux, as well as its link to UNESCO, could form the basis of this branding strategy. Indeed, the etiquette “Lavaux” is common to the different stakeholders of the area.

Therefore, it can be concluded that the right entities and strategies have been set up to sustain the heritage over time. The interests of the various stakeholders are considered to reach the different goals of protection and a model for collaboration is in place. The effective collaboration can be pushed even further to ensure the actions of each are consistent with the overall strategy, especially in terms of promotion. This increased collaboration will root from the willingness of each to imply more into the vineyard sustainability and promotion, individual actions leading to this final global effort.

6. Comparison of demand and supply sides

This chapter includes the comparison of the analysis of the demand and supply sides. Section 6.1 compares the perception geographically, generationally and gender based. The UNESCO definition comparison is performed without segmentation. A global comparison is also done to provide a summary of the findings. In section 6.2, the wine consumption after UNESCO nomination is compared between demand and supply sides. Then, the visits analysis is put into relationship with the supply side's interviews. Practical recommendations are developed in the next chapter, as a result of the comparison, to improve the match between perception and promotion, including the question of branding.

6.1 Perception compared to promotion

6.1.1 Western Switzerland inhabitants

In Western Switzerland, including Lavaux perimeter, wine-related business, which is the main activity sector in Lavaux, is well-recognized. This aspect is very present in the nature of the promotion of Lavaux and is anchored in the perception of inhabitants of Western Switzerland. Together with the unique landscape composition and the UNESCO nomination, there is a link between the image that is promoted and people's perception for this perimeter.

6.1.2 Eastern Switzerland and abroad inhabitants

While the interviewees mentioned Swiss German as an important customer group, and underlined the gain in international recognition, the perception of the people living far from Lavaux isn't really in agreement with that. Even though the wine-related aspects, the lake and UNESCO remain in peripheries, the main factor in the central core of perception in *Unknown*. This could lead to the following conclusion: either, people have visited Lavaux, or, they don't know it at all. Regarding the Swiss German population, they might be prevented to come due to the language barrier. It can be assumed that, the knowledge of Lavaux outside the borders still needs improvement, to cover a larger portion of the world population.

6.1.3 Generational

Amongst generations, the perception corresponds quite well to the results of the interviews. Indeed, the older the visitors, the most interest in culture and heritage. Also, the increase in interest in wine by younger generations is well-represented in the

analysis. The visual landscape of Lavaux, its activities and the UNESCO aspects are well-known amongst generations and shared no matter the age of the person. There is no real difference in the perception letting know about a specific interest from younger generations. Though, this could have been interesting to compare the perception of Lavaux, ten to fifteen years ago, of people of 20-30 years old at each period. This might have displayed a difference in interests, that could confirm this rediscovery of wine by this generation.

6.1.4 Gender-based

In the analysis of promotion, the women were quoted as having and increasing interest for wine. This is not clearly standing out from the perception analysis, apart from the inclusion of Chasselas in women's contrast area. This can let think that women attach an importance to the variety they drink and, therefore, an increased interest in the product itself. Apart from this difference, the values perceived by women and men correspond to the main aspects of promotion of Lavaux.

6.1.5 UNESCO definition

Even though uniqueness appeared quite several times when recalling values associated with Lavaux, the UNESCO definition is only associated a few times with this uniqueness. The protection aspect, that has been quoted in majority by the survey's participants, is quite positive compared to the promotion done. This aspect is of high importance and this is reassuring, somehow, that it remains in people's minds. Also, the heritage and international recognition are frequently associated with UNESCO and highlighted in promotion as well. A tighter link with Lavaux could be made between the protection and international dimensions in people's perception. The first could help sustaining the vineyard, while the second could increase the global world knowledge of Lavaux.

6.1.6 Comparison for all groups

Wine-related aspects, landscape configuration and UNESCO are values shared amongst nearly all groups, corresponding to the actual picture of Lavaux. However, the cultural aspects, the traditions, the locality of the products aren't in people's minds when talking about Lavaux, even though they live quite close and might be consumers of the products. This displays a gap: the promotion highlights the obvious values, while what is behind - the work over time, the products, the heritage – isn't really stated, or not enough to be associated to Lavaux. This is surprising, as all the interviewees quoted them as values for promotion.

These values are implicit, which can be hard to promote. They are, indirectly, implied in the products, in the events organised, but not visually displayed. The visual representation can have a high impact on the perception of people. To anchor the values of traditions, locality of the products, heritage and culture, they should be underlined in promotion, used as a tool to favour preferred tourism. People in search of unique tradition and cultural experience might avoid Lavaux due to its promotion on the view and the wine-related products, while Lavaux offers what they are looking for.

Globally, people associated Lavaux with sun, therefore, high season. This goes along with a promotion that is made. This will probably be hard to change, as the configuration of Lavaux is more favourable to summer visits. However, the creation of an event, or of a specific, unique activity in winter could influence people's opinions and have them remember Lavaux for something else than summer walks.

6.2 Wine consumption after UNESCO nomination

The wine consumption habits in link with UNESCO are in agreement on supply and demand sides: the UNESCO didn't increase the wine sales, though it was sometimes expected by wine makers. As mentioned earlier, this is hard to say whether a decrease would have occurred without the UNESCO nomination with the data available. To assess the real UNESCO impact, a difference-in-difference analysis would have been required, to compare Lavaux wine sales with other tendencies on the Swiss wine market. Indeed, without the UNESCO, Lavaux wines could have experienced a decrease in sales.

Actually, this might be more aligned with the idea of tradition, of proximity: the UNESCO helped the vineyard itself to gain international recognition, though, the products are promoted in a sense of family business and local products. This can be perceived positively: despite the UNESCO nomination, the producers, intentionally or not, kept the locality of the products, their quality, the traditions in the production, as main values. An orientation towards mass production and the maximisation of benefits – even though this couldn't really be possible in Lavaux – could have killed these aspects.

A slight preference for Lavaux in events such as Caves Ouvertes was mentioned in the interviews. This didn't stand out in the survey. Though, even if people participate more in Caves Ouvertes in Lavaux than in other vineyards in Canton de Vaud, this doesn't mean that they will buy products from Lavaux or consume more of them outside the events. This could confirm that the sales incurred by such events are marginal and, as mentioned in the interviews, people come to enjoy the event, without the intent to buy products. From a wine maker's point of view, a benefit could be created from this event

in the sense that there is an opportunity to stand out from competitors, for instance, by having a well-developed structure and organised tastings during that day. Indirectly, people will recall the name when they will be buying Lavaux's wine, and therefore they could favour a wine maker that left them a good image.

6.3 Visits compared to promotion

Amongst all groups, the most highlighted activities by promotion are the ones the most performed in the vineyard. This leads to the conclusion that these activities are well-promoted, and that the focus is on the right ones.

Also, the fact that villages and walks are favoured by visitors confirms the orientation towards a sustainable tourism, avoiding traffic and change in the landscape configuration. People seem to enjoy the walks, maybe to escape from the cities, in the weekends or during vacations, and there is a need that this fresh air remains over time.

In addition to that, wine tastings and gastronomy confirm the classification of Lavaux in the strategic domain "Art de vivre". The quality and local products, and the importance of these sectors for Lavaux's economic activity need to be taken care of. The offer developed around these products is increasingly more corresponding to the market demand. The need for possibilities to taste wine has been considered by some and the effort to develop opened structures must be pursued.

On top of that, Caves Ouvertes, in the survey, were mentioned mainly by women of Generation Y. In comparison with the interviews, this fully corresponds: women have an increasing interest in wine, especially younger generations. This is an event that women tend to remember and quoted when thinking about activities in Lavaux, proving a real interest in it.

To conclude, the strategy of aiming at preferred tourism, avoiding therefore mass tourism, seems to correspond both the demand and supply sides. People enjoy the peacefulness, the possibilities to walk, discover the villages, enjoy traditional and local products. Also, the infrastructures in Lavaux are not designed to welcome mass tourism. The small villages, the roads, wouldn't allow a high increase in frequentation.

7. Recommendations

As mentioned all throughout the report, the landscape and vineyard – and all that relates to it – allow to attract people in Lavaux. The goal, as they know what to expect when coming to Lavaux, is to add value to their visit with the traditions and locality aspects. This goes through quality products, good services, and, most of all, tasting spaces with wide opening hours. The image of the visitors will then shift towards the traditions behind the products, increasing the awareness about culture and history. This awareness can also be raised by explanations boards, enabling a better understanding of the culture, the work behind the heritage, and the education of the visitors to protect the heritage.

Even though, internationally, the breath-taking view and vineyard aspects need to remain overall, trends tend to shift towards an increasing interest for local and traditional products. These aspects deserve to be put under the spotlights and shouldn't be forgotten. Younger generations like to the proximity with producers, are increasingly more curious about the origin of the product and are aware of the benefits of local consumption.

The organisation of the promotion corresponds to the market needs and the collaboration amongst actors goes well. The unity between the whole area needs to be worked on, to find common ground and goals, while still keeping the individuality and uniqueness of each business. Imposed guidelines in terms of promotion could have appeared, at first, as a way to ensure consistent promotion but it would probably be inappropriate for many actors, and not well-received. Though, having a common vision of where the promotion is aimed at, having in mind that working together with the others will lead to an increase in the number of customers, can help a lot developing this cohesion among the different actors.

The seasonality factor can hardly be changed, as the nature of activities is more tailored to warmer months. Of course, the organisation of events, or effort to attract local visitors in winter can help avoiding this dead season from November to March. It might prove, as well, that Lavaux can be visited any time of the year, so can walks be enjoyed. The hardest part is to find convincing promotional tools to attract people in winter. In Switzerland, some traditional meals – raclette, fondue – can easily be associated with winter. A combination of a guided walk followed by one of these meals and a wine tasting could be interesting to develop and to see how successful it is. Also, as mentioned earlier, in terms of products, the move of wine tourism to mountains or other touristic attractions needs to be pursued.

Going further in the ideas on how to develop tourism in winter, plus tradition and history awareness, some other vineyards possess Wine and Vine Museums. In Lavaux, no such structure exists. A small space or building, within the vineyard, describing the history of Lavaux, the specificities of Lavaux, the vineyard terraces, the traditions, the work of the vine, the creation of wine and the link with UNESCO could be imagined. To avoid the image of a boring experience only storytelling the history of Lavaux, some interactive games – for instance, a representation of the wine harvest, done by hand in Lavaux, of wine pressing in the old times compared to today – and a wine tasting or juice tasting for children at the end. The total time of visit should remain short – maybe, 45 minutes to one hour for the whole experience – but allow to develop the tradition, historical, cultural aspects, mentioning the sustainability of these values over time, adding therefore the educational dimension in the visit. Also, a collaboration with active wine makers to have a visit of a winery could be imagined, with a typical wine production space in Lavaux.

This last idea could fill the gap of the family activities in Lavaux. The goal is not to include children in purely wine tasting activities or wine-related events, but to have a space where families can go, to enjoy a small wine tasting, increase awareness of the future generations and still spend some time in Lavaux.

The addition of a workshop for visitors to create their own wine arose. Though, considering the time frame, quantity of grapes needed compared to the relatively small production in Lavaux, wouldn't seem efficient. However, the techniques and tools used during the whole production chain can be displayed in the museum, to provide a practical view on the topic. In the same context, the production of specifically labelled wines, for companies or other private purposes, might appear a bit unrealistic: the production remains relatively small compared to other vineyards or varieties, implying that the production of specific varieties for private purposes might not correspond to the market possibilities. However, the idea of producing specific varieties for events, following the example of Massy Vins, who have produced a specific wine for Fête des Vignerons in 2019, can add exclusiveness to events. This could be applied to other, more recurring, events such as Caves Ouvertes for instance, to motivate people to come to the winery to try this unique and limited-edition variety.

These recommendations should be obviously assessed in terms of possibilities of development, financial viability and real chance of success behind that, with market research, surveys and, for the events, trial on one year or two to measure the actual success or potential of these ideas.

7.1 The question of branding

As mentioned in the areas for improvement, Lavaux doesn't have a symbol, or, from a marketing point of view, what is called a brand image. Also, no common image is promoted among the actors in the vineyard. The importance of branding has been highlighted in the introduction, especially towards younger generations. Branding allows a broader reach, that it be local or furthest, leading to a common view of people about the destination.

Lavaux, since a bit more than a decade, has the privilege to be part of the UNESCO World Heritage List. UNESCO could be the basis of the branding strategy for the whole site, including other aspects of the vineyard. As a reminder, UNESCO can't be explicitly used as a brand name.

The experience and traditions are important according to the different actors. A combination of these, with the UNESCO renown, could help building a common image of the site. Among the public, protection and heritage are the most recalled values for UNESCO. On the other hand, wine is a considerable part of perceptions amongst generations, together with the landscape.

Based on that, the following experience, imaged, could constitute a brand image for Lavaux: a typical vineyard house – or vineyard hut - part of the heritage, with a group of friends having a glass a wine, in presence of the wine maker, within the vines and the breath-taking landscape. With that, the common values shared amongst promotion and perception would be grouped to give more weight to the promotion. The friends could be representatives of younger generations – 25-30 years old – and older ones – 45 and above.

The experience suggested by the image would match the idea of preferred tourism and the promotion of wine tourism. Lavaux's wines would be the product gathering the friends, that it be in the weekend or in the evening. Afterwork, as explained early, can be interesting to push to a second level, to spread more the visitors over the week. This image could address young generations but also to older generations, who might have more financial means due to a longer-term professional situation. The moment will be the core of the promotion, as well as the enjoyment of a relaxing experience within a protected area.

This would allow the site to have a common emblem amongst all the promotion actors. The brand image could be shared, within the vineyard, promoted, and be more meaningful for the external visitors. To ensure an efficient branding strategy, the

collaboration amongst the promotion actors, the inhabitants and the authorities is necessary. Branding needs a common effort to have a strong influence on visitors.

A brand image organised only around a product doesn't seem relevant for the area. On the one hand, there is much more than only products in Lavaux, and, on the other hand, this would be contrary to the current strategy of promoting more the experience, as well as the younger generations' trends in terms of behaviour. Experience promotion seems much more adapted to the activity sectors in Lavaux.

The image suggested is, already today, in the mind of the promotion actors. The goal would be to agree, amongst all the actors, that this experience constitutes the symbol for the area. The promotion can then root from this, to develop into further details. Also, the current offer in the vineyard already aligns with it. The only change required would be promotional, to ensure consistence amongst the different actors.

Of course, the image suggested doesn't include families. A similar experience could be promoted, with families, in the same context, with fruit juices, for instance, for the children. This would be a powerful message to show families that there are reasons to come to Lavaux even with children. Also, this would go along with the initial experience suggested, without having two contrary branding strategies for each target group.

In both images suggested, some key values would stand out: tradition, local products, heritage and view. These values could influence the perception that the public currently has. Indeed, they will add the aspects of traditions and heritage deeper, as well as the proximity with the wine makers. The moment would be the core of the branding, promoting the idea of meeting with other people as well.

The decision on branding should reflect the most interests of different stakeholders, including wine makers, entities active in the catering industry, tourist offices, Lavaux Patrimoine Mondial, amongst others. Considering the organisation of Lavaux Patrimoine Mondial, the discussions and decisions around the branding could be done within the activities of the association and its members. Regarding the costs of branding, public and private contributions from the different members can appear as relevant to spread the expenses of the establishment of the branding image.

To be efficient, the branding should be imposed to the different actors in the vineyard. Indeed, coordination is crucial in a branding strategy, to be consistent in its whole. In case one or more economic actors decides not to follow the guidelines, the branding loses its credibility towards the public, and therefore its efficiency. To enable the use of this mandatory promotional image, this would be important to highlight the fact that,

despite this common guideline, the individualities and the diversity are to be kept at a lower level. The importance lays in attracting visitors in the vineyard first, before orienting them towards a specific place as a second step.

8. Conclusion

This research paper analysed the perception and habits of the public about the area of Lavaux, as well as the promotion done of the area. The demand and supply sides, as called, were compared in order to provide recommendations about improvements that could be made.

Globally, it can be concluded that the demand side, including the public's perception and behaviour, corresponds to the supply side, encompassing the promotion done by different economic actors. The results of the analysis of the perception and habits are consistent with the answers given by the interviewees. Moreover, the general idea that is made of Lavaux wasn't of any surprise for most of the aspects.

The key dimension that will need to be carefully worked on by the different actors is the highlighting of the traditions and heritage, through their promotion and branding. This work will need to be collective, to ensure, on the one hand, the sustainability of what was inherited from the past and, on the other hand, to put a greater focus on these aspects in promotion.

The strategy in place and current work by the different actors go in the right direction and should appear as efficient over the coming years. The collaboration amongst the actors, the values that need to be underlined, the strategic goals, correspond to the current actions taken.

Finally, the recommendations in this report might provide some insights about what could be developed for an improved consistence between the perception, promotion and market needs. These ideas are, for some, practical and faster to set up, while other would need a complete study to determine whether the development is valuable.

The study of the economic change in Lavaux after the UNESCO nomination, especially in terms of wine sales, wasn't the goal of this report. Indeed, even though a study of the economic impact of the UNESCO nomination would have been interesting, data were hardly available. Therefore, an analysis of the wine sales with and without the UNESCO factor, in comparison to other Swiss vineyards, wasn't possible with the amount of data at disposal.

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Appendix 1: Sample statistics

Data collected:

- From 2nd January.2019 to 18th January 2019
- From 3rd March 2019 to 22nd March 2019

Tool: Survey Monkey, shared through messages and social networks. A paying version of Survey Monkey was used to enable the creation of a more relevant sequence of questions.

Total number of participants	204
Number of participants without demographic details	8
Total number of participants considered in the analysis	196

Geographical statistics

	Number	Percentage
Lavaux's perimeter	51	26%
Western Switzerland	131	67%
Eastern Switzerland and abroad	14	7%

Generational statistics

Name of range	Range min, birth year	Range max, birth year	Total participants
Baby Boomers	1948	1959	10
Generation X	1960	1979	41
Generation Y	1980	1994	101
Generation Z	1995	1999	44

Gender statistics

	Number	Percentage
Women	131	67%
Men	65	33%

Wine-consumption segment statistics

	Number	Percentage
Special occasions	56	29.2%
Once a month	41	21.4%
Once a week	68	35.4%
3-4 times a week	25	13%
Everyday	2	1%

Appendix 2: Lavaux perimeter

Postcode	Commune	Comment
1000	Lausanne	Located in the 5km perimeter around the Lavaux UNESCO area
1001	Lausanne	Located in the 5km perimeter around the Lavaux UNESCO area
1002	Lausanne	Located in the 5km perimeter around the Lavaux UNESCO area
1003	Lausanne	Located in the 5km perimeter around the Lavaux UNESCO area
1004	Lausanne	Located in the 5km perimeter around the Lavaux UNESCO area
1005	Lausanne	Located in the 5km perimeter around the Lavaux UNESCO area
1006	Lausanne	Located in the 5km perimeter around the Lavaux UNESCO area
1007	Lausanne	Located in the 5km perimeter around the Lavaux UNESCO area
1009	Pully	Located in the 5km perimeter around the Lavaux UNESCO area
1010	Lausanne	Located in the 5km perimeter around the Lavaux UNESCO area
1011	Lausanne	Located in the 5km perimeter around the Lavaux UNESCO area
1012	Lausanne	Located in the 5km perimeter around the Lavaux UNESCO area
1014	Lausanne	Located in the 5km perimeter around the Lavaux UNESCO area
1015	Lausanne	Located in the 5km perimeter around the Lavaux UNESCO area
1066	Epalinges	Located in the 5km perimeter around the Lavaux UNESCO area
1070	Puidoux	Included in the perimeter of Lavaux UNESCO
1071	Chexbres	Included in the perimeter of Lavaux UNESCO
1071	Rivaz	Included in the perimeter of Lavaux UNESCO
1071	Saint-Saphorin	Included in the perimeter of Lavaux UNESCO
1072	Forel (Lavaux)	Located in the 5km perimeter around the Lavaux UNESCO area
1073	Savigny	Located in the 5km perimeter around the Lavaux UNESCO area
1077	Servion	Located in the 5km perimeter around the Lavaux UNESCO area
1078	Essertes	Located in the 5km perimeter around the Lavaux UNESCO area
1083	Jorat-Mézières	Located in the 5km perimeter around the Lavaux UNESCO area
1090	La Croix-sur-Lutry	Included in the perimeter of Lavaux UNESCO
1091	Grandvaux	Included in the perimeter of Lavaux UNESCO
1092	Belmont-sur-Lausanne	Located in the 5km perimeter around the Lavaux UNESCO area
1093	La Conversion	Included in the perimeter of Lavaux UNESCO
1094	Paudex	Located in the 5km perimeter around the Lavaux UNESCO area
1095	Lutry	Included in the perimeter of Lavaux UNESCO
1096	Cully	Included in the perimeter of Lavaux UNESCO
1096	Villette	Included in the perimeter of Lavaux UNESCO
1097	Riex	Included in the perimeter of Lavaux UNESCO
1098	Eppesses	Included in the perimeter of Lavaux UNESCO
1610	Oron-la-Ville	Located in the 5km perimeter around the Lavaux UNESCO area
1614	Granges (Veveyse)	Limitroph commune in the Canton of Fribourg
1616	Attalens	Limitroph commune in the Canton of Fribourg

1617	Remaufens	Limitroph commune in the Canton of Fribourg
1618	Châtel-St-Denis	Limitroph commune in the Canton of Fribourg
1800	Vevey	Located in the 5km perimeter around the Lavaux UNESCO area
1801	Mont-Pélerin	Located in the 5km perimeter around the Lavaux UNESCO area
1802	Corseaux	Included in the perimeter of Lavaux UNESCO
1803	Chardonne	Included in the perimeter of Lavaux UNESCO
1804	Corsier-sur-Vevey	Included in the perimeter of Lavaux UNESCO
1805	Jongny	Included in the perimeter of Lavaux UNESCO
1806	Saint-Légier-La-Chiésaz	Located in the 5km perimeter around the Lavaux UNESCO area
1807	Blonay	Located in the 5km perimeter around the Lavaux UNESCO area
1814	La Tour-de-Peilz	Located in the 5km perimeter around the Lavaux UNESCO area

Appendix 3: Online survey questions

1. If I tell you Lavaux, what are the 3 first words or short sentences coming to your mind? (If you don't know Lavaux, please answer "I don't know" in the first blank space)
Open answer, 3 blank spaces
2. In a few words, with what do you associate the word "UNESCO"
Open answer, 1 blank space
3. Have you ever visited the Lavaux area?
 - a. No
 - b. Yes. Please precise what places or activities.
Open answer, 1 blank space
4. Have you ever drunk wine?
 - a. No. (in this case, directly goes to demographics)
 - b. Yes
 - i. At which frequency do you drink wine?
 1. Only for special occasions (Christmas, New Year, events, ...)
 2. Once a month
 3. Once a week
 4. Between 3-4 times a week
 5. Everyday
 - ii. I most often drink...
 1. Lavaux wine
 2. La Côte wine
 3. No preference, I drink what I feel like to drink on the moment.
 4. None of both: please precise which vineyard or area:
Open answer, 1 blank space
 - iii. Has the nomination of Lavaux as a UNESCO World Heritage site had an influence on your consumption of Lavaux wine?
 1. No
 2. Yes. Please describe how (increase, decrease, change in perception)
Open answer, 1 blank space
5. I live...
 - a. In Switzerland: please indicate the postcode
Open answer, 1 blank space
 - b. Abroad: please indicate the country
Open answer, 1 blank space
6. I am...
 - a. A man
 - b. A woman
7. Birth year:
Open answer, 1 blank space
8. What work do you do at the moment?
Open answer, 1 blank space.

Appendix 4: Perception analysis data, steps and decisions

All the answers without demographics were removed as a first step in the survey analysis.

Total answers 566

Total categories 55

The same categories were kept for all segments, to allow comparison between them. The categories with a 0 frequency in some segments were removed at the segment level.

The semantic categorization was made in French at first, as the majority of the answers were given in French. The translation was made at the category level, as a last step, using the official French-English dictionary provided by Larousse.

During the semantic categorization, subjective choices were avoided at maximum, for instance limiting the associations that seemed logical for the author, but which weren't necessarily intended by the survey participants. Lake and Lake Geneva, or Heritage and UNESCO Heritage, Terraces and Vineyard Terraces were kept separate, as they could have different meanings or weren't detailed enough to be associated with typical Lavaux characteristics.

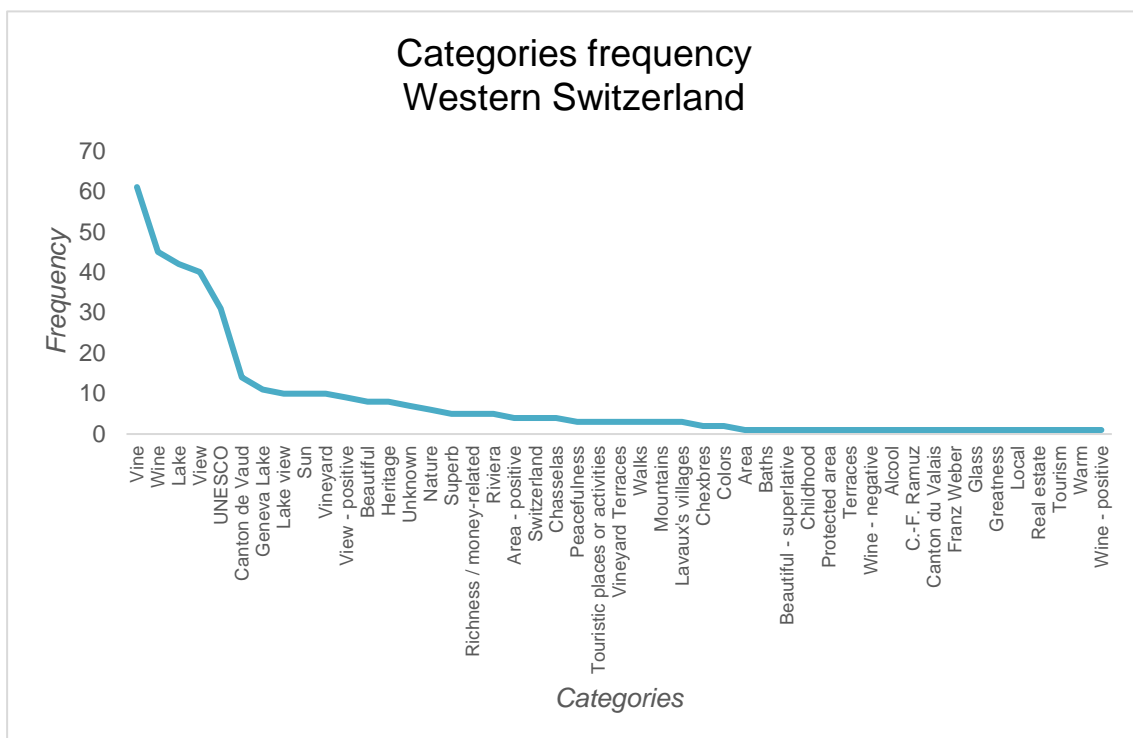
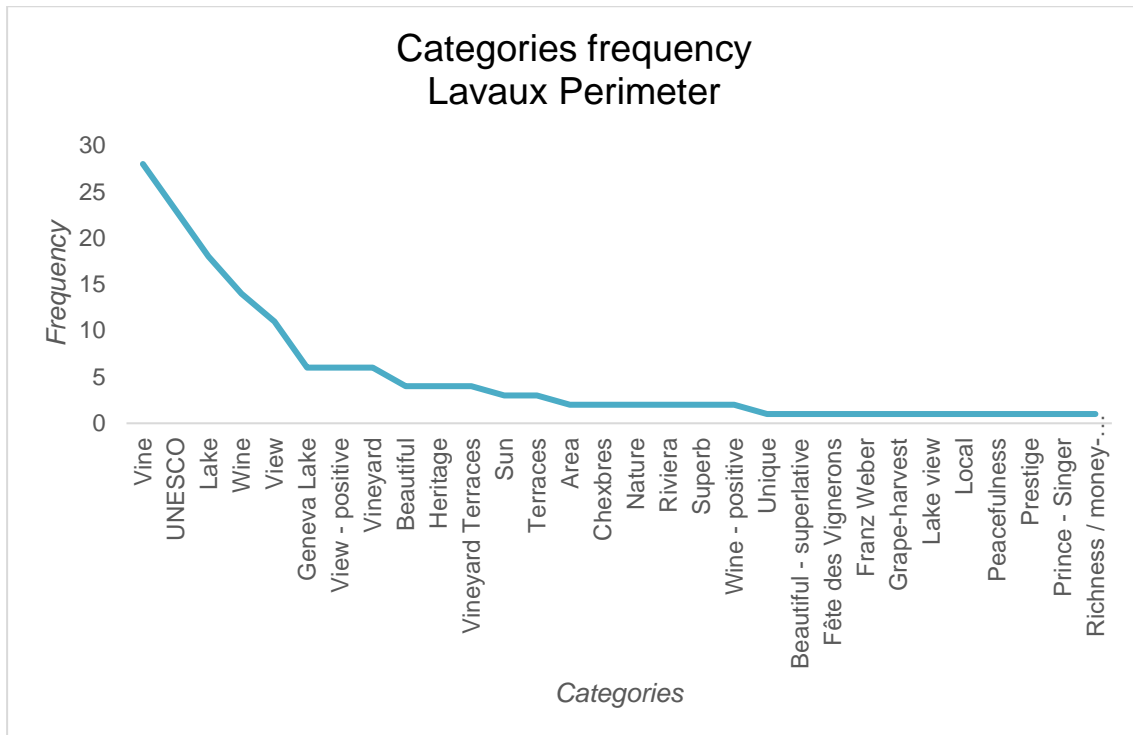
Below, some of the specific choices made during semantic categorization:

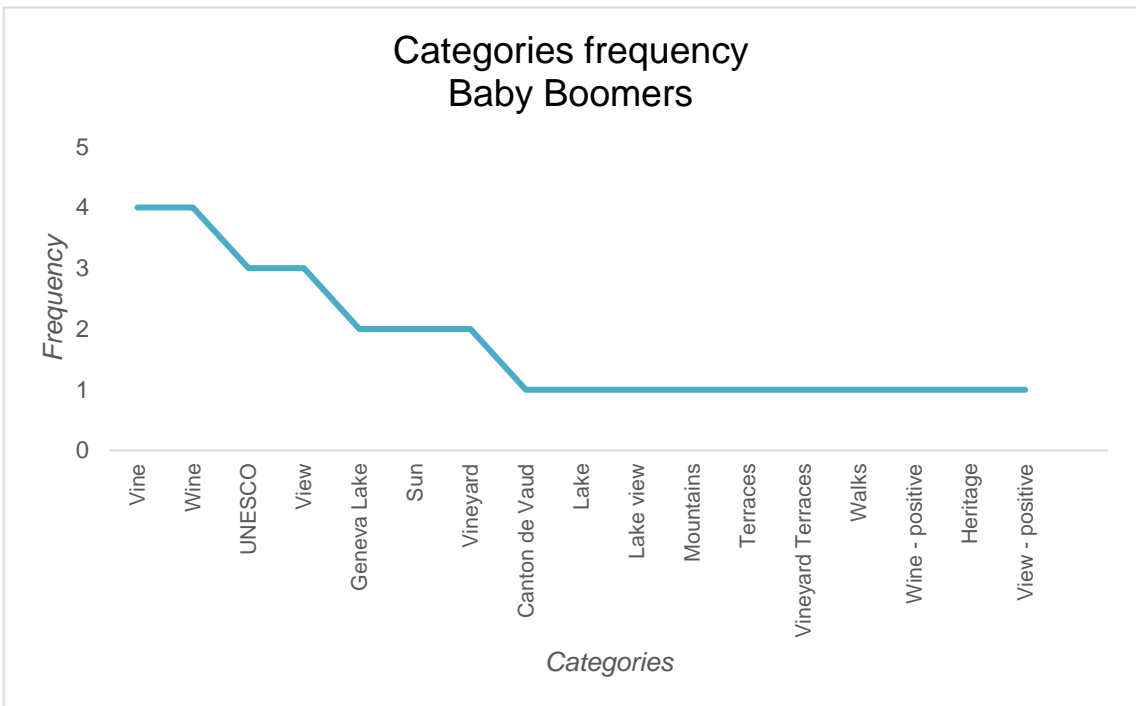
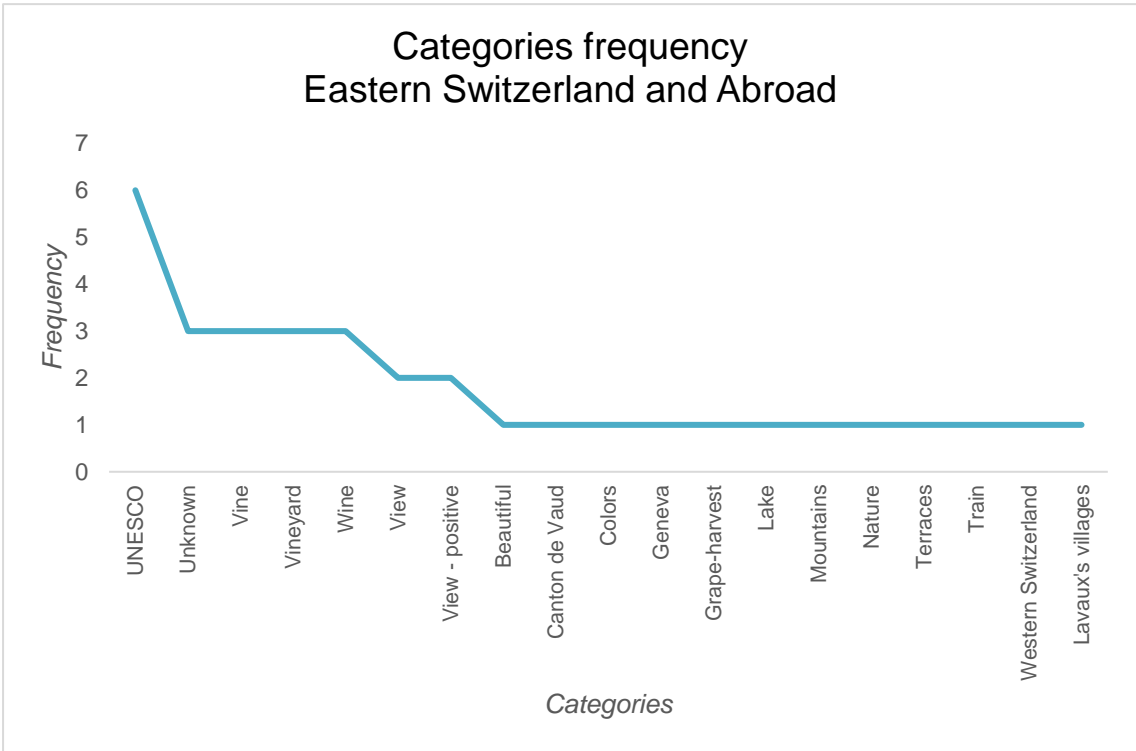
- “Chexbres” kept separate, not included in Lavaux’s villages. It was mentioned several times, as well as “Balcon du Léman”, which is typically linked to the commune
- White wine, mentioned once, associated with “Chasselas”
- Montreux and Vevey grouped in “Riviera”
- Dialect words (Vaudois) included in “Canton de Vaud”
- Countryside included in “Nature”
- Beautiful and Superb kept separated
- Vine and Vineyard kept separated

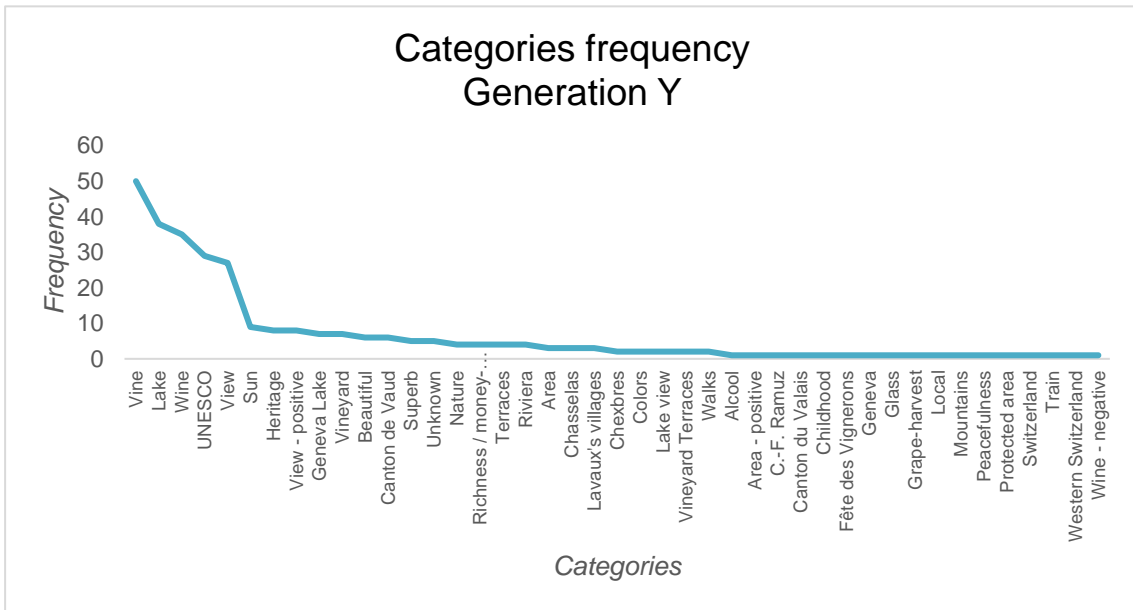
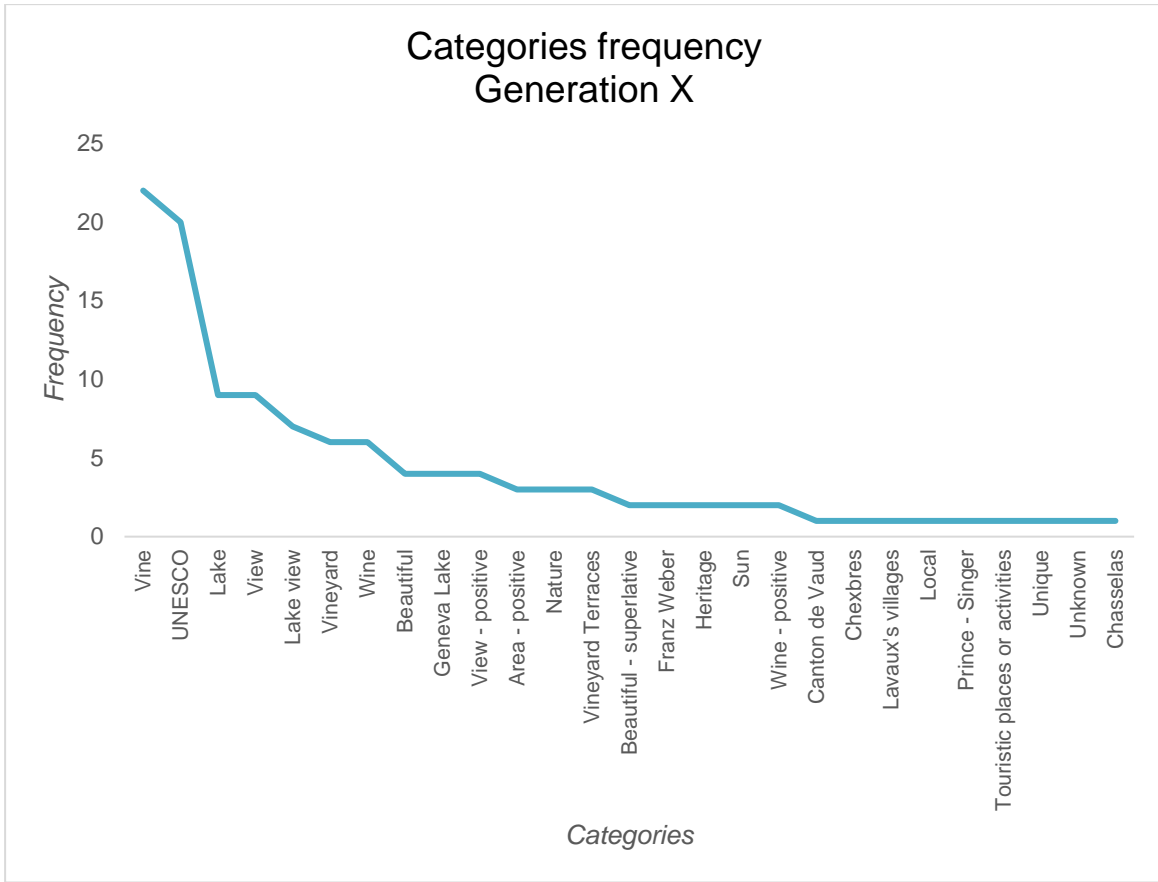
Data analysis

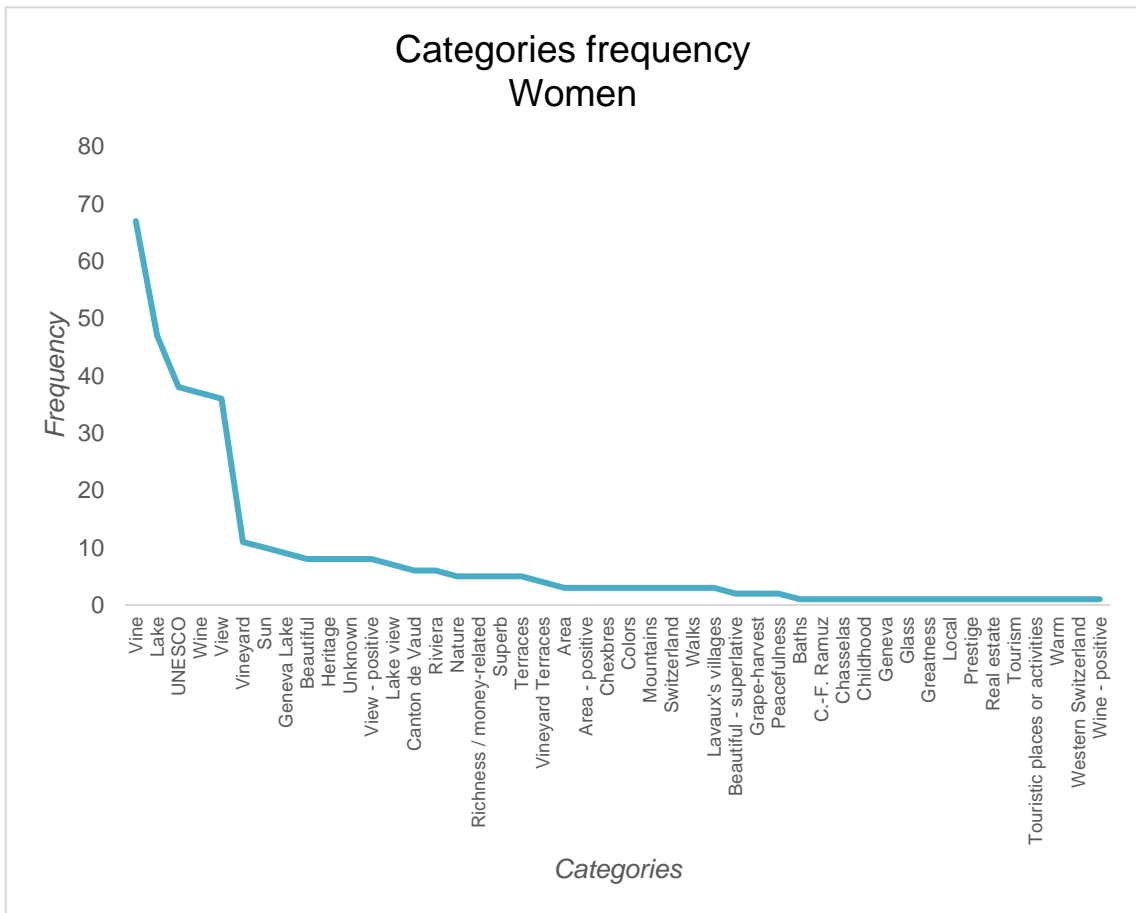
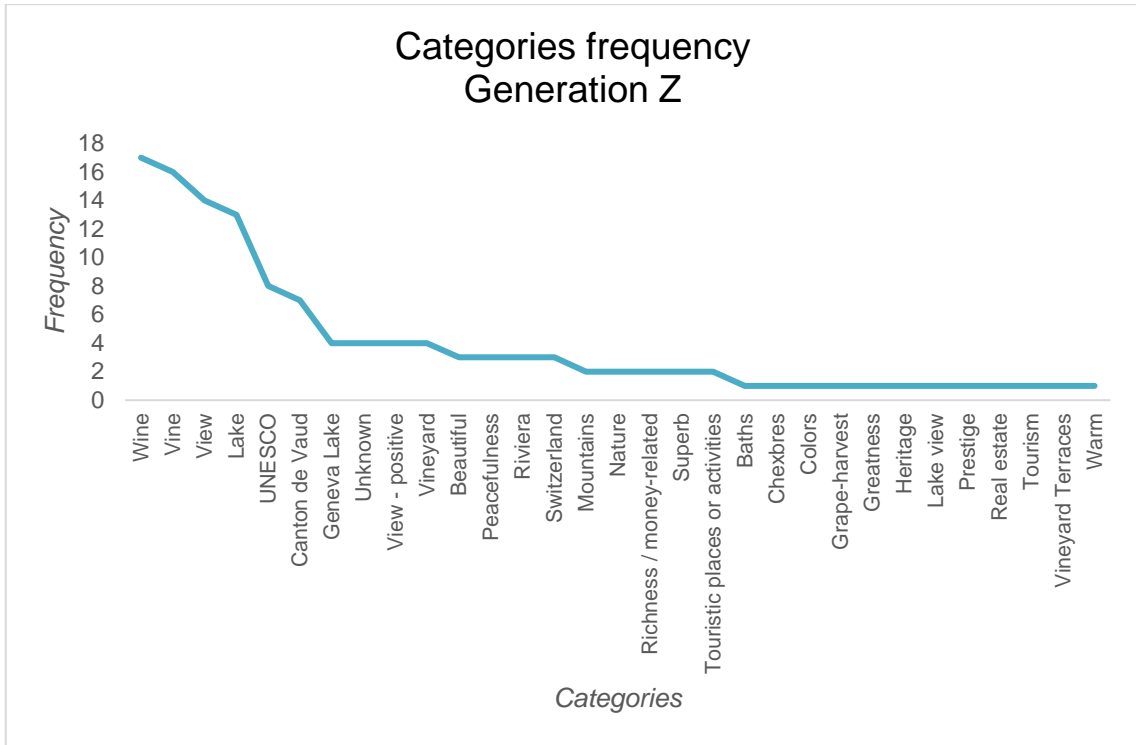
- Frequency determined with the frequency graphs
- Importance considered as follow:
 - First word given is *Very important*
 - Second and third words *Less important*

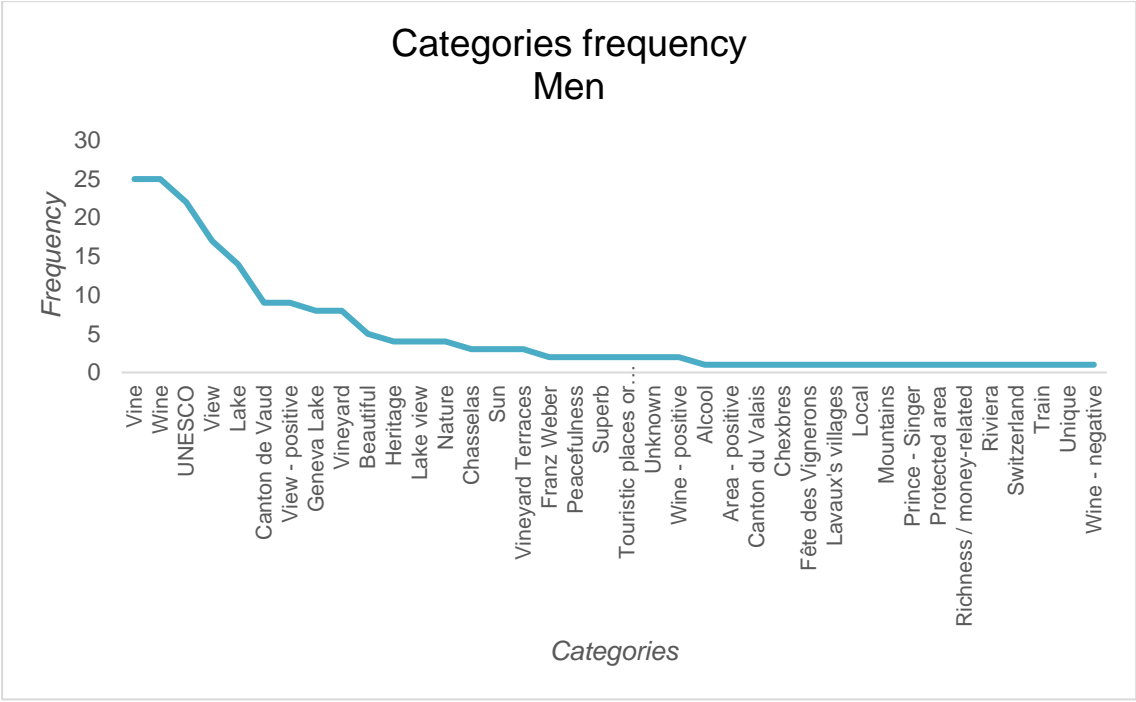
Appendix 5: Frequency tables for perception











Appendix 6: Wine consumption, visits and UNESCO data analysis decisions

Wine consumption

To analyse the wine consumption of the participants, all the participants who don't consume wine have been removed. In total, 192 participants remained.

When the answer appeared inconsistent, for instance people indicating having no preference, but precising a variety as their preference, were considered as having a preference.

The analysis was done depending on the frequency of consumption and on whether the participant lives in Lavaux perimeter or not.

Visit analysis

Considering the configuration of the answer asked for the places visited, a categorization was performed with a maximum of 5 places or activities.

Only the frequency of the categories was considered. No importance was set up, as the order in which the words were given could depend on several different factors not related to the importance given to a place, such as most recent, most frequently visited or closest to the place where the person lives.

The following choices were made:

- *Walks / rides* includes car tours, bike rides, moto rides, trains
- Le Deck and Baron Tavernier kept separate from other restaurants or hotels, as its frequency was high
- Wine cellars or Caveaux included in Wine tastings and Wine cellars visits

In the analysis, Château de Glérolles was considered as a cultural element. This represented, in the opinion of the author, a symbol of Lavaux. Though, its strong wine-production orientation could have oriented the choice towards the category "Wine maker".

Appendix 7: Interviews synthesis

Baron Tavernier, Hotel – Restaurant – Spa, Chexbres

Face-to-face interview on 2nd April 2019 with Mr. Gaudenz Dorta, Director of the hotel

Role

- Active as a hotel, restaurant and spa in the vineyard; including a lounge bar with a panoramic view
- Offers local products as much as possible, with international products as well
- Weddings and birthday parties

Tourism

- Highly season- and weather-dependent: up to 3-4 times more customers between spring and fall
- No typical customer profile: people from many nationalities, local or tourists, different ages, for business or leisure reasons
- Average stay: 2 nights

UNESCO

- Mr. Dorta thinks that UNESCO has probably had an impact on the area's recognition internationally, but he wasn't directing the hotel at that time

Event

- Some special events organised on-site, depending on the weather
- Collaborates to some extent with some events in Lavaux
- Hard to collaborate with some festivals or events happening in the area, due to lack of mobility between places

Own promotion

- Relies on:
 - Local sponsoring
 - Advertising
 - Tourist office for an international reach
 - Social media
 - Website
 - Word-of-mouth
- No specific promotion or target
- Free to promote the place as they wish

Point i – Montreux-Vevey Tourisme, Chexbres

Face-to-face interview on 2nd April 2019 with Ms. Natascha B. Morel, Marketing and Communication employee

Role

- Lavaux is on the “territory” promoted by Montreux-Vevey Tourisme
- Strategic point in Chexbres due to easy coach access
- Sell experiences / packages in the vineyard
- Responsible for CFF day cards for some communes
- Advise customers (activities/walk/wine tasting)

Tourism

- Tourism in the area is highly weather-dependent, high season from April to October
- More visitors during holidays and weekends
- Visitors typology: no real typical customer, many different ages. In terms of nationality:
 - Asian, Indian come mainly with coaches
 - Arab tourists less frequent, due to cultural aspects (wine)
 - South American, US, Dutch, German, Italian, French come as individual tourists, strong Swiss franc discouraged some of them.
 - Swiss German come since generations, as a “tradition”Women, outside maternity age (before-after) are an important customer group
- Short stays (1-3 days)

UNESCO

- Point i created after UNESCO nomination
- Ms. Morel believes that the UNESCO has a considerable impact on the destination, on international tourism, and on the vision, people have on Lavaux

Events

- Many events in the area over the year, promoted by Montreux Riviera
- Caves Ouvertes attract many visitors, mostly young, including Hispanic and English people

Own promotion and area promotion

- Different means:
 - Fairs and events, with dedicated representants for US and Asia/Middle East
 - Collaboration with:
 - Companies and newspapers for promotion of the area
 - CFF with packages / experiences, full brochuresGood collaboration among actors in the area, even though sometimes some actors aren't able to speak German.
- Promotes wine tourism through different activities
- Adapted promotion for families
- Mobility in the area could be improved

Jacques and Aurélia Joly, Vignerons-Encaveurs, Grandvaux

Face-to-face interview on 2nd April 2019 with Ms. Aurélia Joly

Role

- Offers “Table d’hôtes”, apartment renting, wine tastings, experiences, wine-related products. The local aspect is very present in their offer, and this is in the trends nowadays.
- Play a role in promotion due to their activities offer

Tourism

- Season impacts visits, with a peak in May, September and October
- Customers' typology:
 - Often between 40-50 years' old, not experts in wine
 - Part of local customers,
 - Swiss German customers are faithful customers, with larger orders

- Part of international customers, mostly from Asia, and some French and German people
- Short stays (2-4 days)

UNESCO

- Impact on foreign visitors, more “walkers-visitors” in search for fresh air
- Tour operators stop in Lavaux due to UNESCO recognition

Events

- Participate to all local events:
 - Caves Ouvertes attracts visitors from quite far
 - Events in Caveau Corto attract local visitors
- Caveau Corto, run every week by another wine maker, corresponds to the market demand, and attracts customers from the nearby large cities
- Take part into Swiss German wine fairs to reach this target

Own promotion

- Means: social media, Internet, mailing, emailing, prospectus, word-of-mouth.
- Values: “Familial”, “Regional”, “Diversification des produits”.
- Must be reactive and adapt to customers
- Due to their ability to speak many languages, welcome groups from US/Italy, via the tourist office.

Area promotion

- Tourist offices do a “wide” promotion of the area.
- When asked what to visit, they orient customers towards activities in Lavaux and outside. There is an app for wine tourism.

Lavaux Express, Cully

Face-to-face interview on 3rd April 2019 with Ms Katya Jobin, secretary of the association and employee at the Point i of Montreux Riviera in Cully

Role

- Offers train tours (train on tires) in the vineyard, private, public and linked with a wine tasting experience. This last isn’t as successful as expected.
- Runs from April to October for public courses, mid-March to November for private ones.

Tourism

- Season- and weather-dependent, high season from June to September. Sundays afternoons attract more customers
- Customers’ typology:
 - Any age with a majority of parents, women and grandparents with children. Individual tourists younger. Train and wine tasting more 35-55 years old.
 - Half-customers are Swiss, the other half international
- Customers don’t come especially for Lavaux Express, and decide it on the spot

UNESCO

- Impact on international visitors, mainly Asian
- There had been an increase in interest 2-3 years after UNESCO; it didn’t last. The global impact not considerable.
- Today people tend to be more interested in heritages and such places.

Events

- Doesn't make promotion through events
- Specific tours during events succeed depending on the type of event
- Partnerships with some events to provide transportation in exchange for promotion

Own promotion

- Means: prospectus, brochures, website, social media (to improve), contracts/partnerships with leisure brochures/websites, ads in newspapers, tourist offices, word-of-mouth, direct mailing
- No guidelines amongst actors
- Highlight the "retro" aspect
- No segmentation

Area promotion

- The landscape attracts most visitors, as well as the UNESCO for Asian people
- Walks are the most requested activities
- Avoid promotion for specific wine makers
- To improve: possibilities to taste wine (opening times of wine makers)
- Goal of the promotion: sell dream, sell experiences

11 Terres, Epesses

Face-to-face interview on 3rd April 2019 with Ms. Camille Grison, working for 11 Terres since 2018.

Role

- 11 Terres groups 11 wine makers to serve their wines in a common place, allowing large opening hours
- Wine tasting / drinking, local products, for individuals or groups
- Partnership with Lavaux Patrimoine Mondial and their guided walks

Tourism

- Season- and weather-dependent, high season from April to November, mostly in the weekend
- Customers' typology:
 - 30-60 years old
 - Many international customers (Asia, US, Netherlands, France)
 - Swiss visitors stop by 11 Terres during their walks in the vineyard

UNESCO

- Ms. Grison believes UNESCO has an impact on international visitors. 11 Terres didn't exist before UNESCO.

Events

- No participation to fairs (wine makers' role)
- 11 Terres participates to events in Epesses, and benefits of their large opening times even after the end of events.

Own promotion

- Means: flyers in hotels, are part of the Point i of Montreux Riviera, social networks, word-of-mouth (powerful!)
- For a Swiss-wide promotion, they rely on tourist offices

- For an international promotion, they rely of tourist offices and hotels
- No guidelines amongst actors for promotion
- Values:
 - “Chaleureux”
 - “Convivialité”
 - “Détente”
 - “Plaisir”
 - “Terroir”

Area promotion

- Area not sufficiently spotlighted, explanation boards could be useful in villages
- To improve the promotion of Lavaux, a focus can be put on the listed heritage, the walks, the view, the lake and the peacefulness.

Vaud Oenotourisme

Phone interview on 4th April 2019 with Mr. Yann Stucki, responsible for the development of wine tourism, project leader for Vaud Oenotourisme

Role

- Different goals:
 - Unify/bring together the different activity sectors in the field
 - Convince of the benefits of the added value of wine tourism
 - Build a quality network
 - At the beginning, wanted to avoid fake promises (i.e. opening times)
 - Work on the offer and master it
 - Create tools to support the different actors in wine tourism
 - Collaboration for the promotion local products, wines, towards the native people.
- “Incubator” for the development of wine tourism, unique in Switzerland
- Certification, training and support actors in wine tourism. It certifies a state-of-mind
- Provides tools to promote the wine tourism

Tourism

- Needs of visitors evolve exponentially, meaning that wine makers can’t rely purely on wine sales but need to adapt and innovate, gearing towards a “purchase-tourism”.
- Visitors are ultra-connected, which needs to be considered.
- Customers’ typology:
 - Swiss German represent an important target
 - Some people interested about what is behind the heritage (“Epicuriens”)
 - Young people who rediscover wine
 - Older people who appreciate wine and have more financial means
- Family aspect important to develop (activities in Lavaux and outside)
- While the stay tends to be quite short (“Excursionistes”), the offer is varied enough for people to stay longer.
- Winter season: wine tourism isn’t limited to the warmer months, there are activities to do in the winter. Another idea is to move wine tourism to mountains, for instance, or in places where visitors tend to go more in the winter. This is important that visitors can access wine-related activities and products in winter as well.

UNESCO

- UNESCO is a proof of the living heritage kept by wine makers.

Events

- Don't participate in fairs or events directly, this is not their role
- Events in the area can be perceived as beneficial, if the wine makers use it positively as a promotion tool and putting the means in place to welcome visitors.

Promotion of wine tourism and Lavaux:

- Lavaux is, in itself, a unique selling proposition, due to UNESCO, history, the quality of the wine. The demand for Lavaux is higher compared to other vineyards in Western Switzerland.
- Collaboration with local entities and events is crucial in the development of the touristic offer, which is a promotion tool in itself.
- Mobility within the area: more oriented towards soft-mobility (walks, cycle), to avoid traffic -> more a "tourisme de prédilection", avoiding mass tourism.
- No specific guidelines to promote the area.
- One of the issues is the fact that each destination of the canton promotes its own business, while promoting the canton as a whole would benefit each of them. There start to be a change, and they work first, with individuals, to reach then a regional collaboration. The idea would be to create a coordinated offer ("offre fédérée", in French), to be able a more efficient promotion internationally.
- Promotion is fragmented among actors, which can appear inconsistent for the customers.
- Office du Tourisme du Canton de Vaud has strategic activity sectors, and wine tourism is part of the "Art de vivre" sector.
- Lausanne included, recently, in the Great Wine Capitals, which adds reliability to the area in terms of wine business.
- Swiss Tourism and Swiss Wine Promotion signed an agreement for wine tourism promotion, selecting the markets interesting in wine tourism.

Quote mentioned by Mr. Stucki:

« L'oenotourisme est une ressource véritable. Il n'est pas une niche à exploiter, mais bien un vrai secteur économique susceptible de rassembler des corporations et des chapelles qui s'ignoraient jusque-là. Nous devons continuer à décloisonner ces forces vives et les faire interagir. »

Paul Dubrule, co-fondateur de la chaîne international ACCOR et président fondateur du Conseil Supérieur de l'oenotourisme français, La Cavale en Luberon – de la vigne à l'oenotourisme, éditions Glénat

Clos du Boux, Domaine Luc Massy, Epesses

Face-to-face interview on 9th April 2019 with Mr. Gregory Massy, Sales and Marketing Manager

Role

- Produces 9-10 different wines from A to Z, controlling the whole production
- Wine tasting with previous booking, and collaboration with 11 Terres
- Collaboration with mountains restaurants, to increase market cover

Tourism

- Season-dependent, winter being a quiet season. The number of customers increases as well after fairs.
- Customers' typology:
 - Age varies, while there has been an increase in younger customers
 - Significant change in the international customers, which used to be nearly inexistent
- People come to discover the wines, that they are Swiss or international. Landscape also attracts visitors.
- Wine tasting is frequently asked.

UNESCO

- Can't really assess the impact, however there are more international tourists and "tourisme de passage".

Events

- Participate to local events, through the opening of the wine cellar
- Caves Ouvertes have experienced change in the sense that they are more international, and people tend to buy lower quantities
- Participated to Habitat et Jardin in 2019 as they used to take part to Comptoir Suisse, which doesn't exist anymore. These events have an impact on the sales, people ordering during the event, but also due to the recall of the name. Also, they attend partners' events in Swiss German areas.
- Currently considering organizing their own event / open doors for the 100th anniversary
- Present at Cully Jazz for some nights in bars/Caveau
- For the Fête des Vignerons, they have developed partnerships with restaurants in Vevey and their wine will be served in the Caveau. A special wine was created for the event.

Own promotion

- From 2019 on, focus on digital means only:
 - Website, online shop
 - Google Ads
 - Facebook and Instagram, including paying services
- Perform targeted promotion as well, for events in the German part of Switzerland for instance, but also globally
- Internationally, they have partners abroad, who know the market and perform administrative work linked to exportations
- No guidelines for their promotion
- Aspects highlighted in their promotion
 - Products' quality
 - Area's beauty
 - Family and tradition

Area promotion

- Office des Vins Vaudois does a good job in promoting the wines of the canton, Montreux Riviera is also a strong actor in the promotion.
- Caves Ouvertes is a powerful promotion tool as well.
- A greater collaboration amongst the different tourist offices, grouping efforts to increase the popularity of Lavaux.

Vinorama, Rivaz

Face-to-face interview on 10th April 2019 with the staff, including Ms. Monica Tomba, manager

Role

- Centre of Discovery, reuniting wines of 140 Lavaux's producers
- Offer tasting packages (including movie/walks)
- Opened 7 days a week from May to October, closed Monday-Tuesday in winter

Tourism

- Season-dependent; customers come anytime in summer, and rather in the evening in winter
- Visitors' typology:
 - Mainly people between 30-80 years old. Vinorama isn't designed for families
 - Increased interest from younger people
 - 60% of visitors come from tour operators (Asia mainly, and India, US, UK, Netherland, Germany, New Zealand, Australia, Brazil)
 - It could be good to attract more local people
 - Swiss German customers tend to buy larger quantities

UNESCO

- Impact on the number of visitors, especially the considerable increase in the tour operators coming
- Creation of Vinorama independent from UNESCO

Events

- Hard to organize events due to location, considering the nature of the activity, implying the impossibility to drive afterwards. They tried to organise themed parties, but it didn't work well
- Don't participate to Caves Ouvertes, Divinum, as it isn't their role.

Own promotion

- Different means: website, prospectus, local ads. Paper ads not useful anymore, as well as direct mailing. The website and prospectus (Montreux Riviera) have the most impact.
- For local promotion, they rely more on word-of-mouth. Individual tourists hear about it by Internet
- Considerable advantage due to opening hours, and the absence of competitors.
- No guidelines for promotion, and this wouldn't be a good idea.

Area promotion

- Lavaux's is a "vitrine incroyable", this is a superb area which is an advantage in itself.
- The promotion done by Montreux Riviera, Vaud Oenotourisme and other promotion partners is efficient.
- An improvement could be the education of tourists as for the good behaviour to have in the vineyard, with information boards for instance.

GEA Vallotton et Chanard, Lausanne

Face-to-face interview on 10th April 2019 with Mr. Jean-Marc Vallotton, founder of GEA Vallotton et Chanard

Role

- Elaborated the application file for the nomination of Lavaux as a UNESCO World Heritage Site, in collaboration with different partners (EPF, delegates, specialists). Included:
 - A reflection group
 - Information sessions for the population
- After the actual nomination, the work of GEA ended.
- Mr. Vallotton also describes widely the nomination process, which is not referred to in details in this synthesis.

Goal of the nomination

- The international dimension wasn't essential at the beginning of the project and appeared a bit later. The vineyard was then expected to gain international recognition through UNESCO.
- Lavaux wasn't properly to save, but from a Swiss point of view, the nomination was important. From abroad, it was perceived as a "timbre poste".

Impact of UNESCO

- Inhabitants expected an increase in the number of visitors in the area, while this was not a goal of the nomination. The increase actually happened.
- He believes there hasn't been a direct impact on the sales of local products. In parallel, a diversification in variety happened to adapt to the market.
- At first, the impact was at an academic level.

Values and promotion

- UNESCO imposes the universality and exceptionality as values. Lavaux has, on its side, strong cultural and pictorial aspects (painters, photographers, writers).
- The cultural aspects have been set a bit aside. Also, the initial idea behind UNESCO hasn't really been kept, which can be understandable from an economical point of view.
- The interest to keep activity in the area needs to be valued: wine makers maintain the vineyard alive
- Mr. Vallotton would highlight the cultural aspects today, while developing the wine tourism, wine-related products is important.
- Lavaux Patrimoine Mondial does a good promotion job, through their guides as well.
- In Lavaux, wine is more promoted as « vin de cépage » rather than « vin d'appellation ». Though, having a single appellation for Lavaux would be impossible and probably inefficient.

Collaboration

- The lack of unity is the biggest handicap internationally. Some groups appear, but there is still a considerable fragmentation amongst actors.
- The main actors are the wine makers themselves. The takeover of their activities over generations will be crucial to sustain the fact that the vineyard stays alive.
- The collaboration during the nomination process was globally good. GEA Vallotton and Chanard didn't directly do proximity work.
- The idea was received well by the population globally.

Office du Tourisme du Canton de Vaud (OTV), Lausanne

Face-to-face interview on 18th April 2019 with Ms. Christel Porchet, Project Manager and Market Responsible; Responsible for the strategic domain "Art de Vivre"

Role

- Promotion association, representing the 13 destinations of the canton as a whole
- Help the creation and development of the touristic offer in the Canton, create products and develop the promotion.
- Media and trade/business role, with collaboration with journalists and tour operators

Tourism

- Wine tourism attracts younger visitors, lots of couples without children. OTV would like to target other segments as well, develop the offer for families
- Cultural aspects attract older visitors, with an interest in heritage, and, globally, higher financial capacity, due to their centres of interest and the price of travelling to Switzerland.
- In winter, visitors tend to be more local
- Visitors need open places and availabilities to taste wine. Swiss-wide, an issue is the closing on Sundays. In Lavaux, some solutions are found (common tasting places and hotline (n.b. after interviewing Lavaux Patrimoine Mondial, this has been replaced by a website)).
- People know what to expect in terms of landscape and the service quality can make the difference.
- Swiss German visitors tend to interest in other wine areas, as they know quite well Lavaux.

UNESCO

- UNESCO emphasised the international image and recognition of Lavaux
- It increases the demand, and therefore the offer
- A negative effect could be the increase in visitors up to a certain point, in some events or periods of the year, which can discourage some.

Events

- OTV doesn't organize events but take part to fairs and events worldwide (public or professional)
- OTV is responsible for communication for Caves Ouvertes Vaudoises
- Fête des Vignerons will probably have an impact on one-day - or less - visitors in the vineyard

Promotion - global

- The OTV positions the product and the offer Swiss-wide and internationally, increasing visibility. They adapt their approach depending on the country they target.
- Regional tourist offices are free to promote their area as they wish. There are suggested themes, for instance with the bike one year. On the other hand, the regional tourist offices consult and inform OTV about their promotion
- Promotion with a strong digital orientation (younger customers), but still keep traditional means. The editorial aspect is important, to relate the authenticity through a story.
- There is no emblem for Canton de Vaud, as it is varied in itself. Global promotion can benefit the area as a whole.

Promotion - Lavaux

- Ms. Porchet would highlight the 3 following values:
 - “Patrimoine / historique”
 - “Culturel”
 - “Diversité du paysage”
- In winter, a lower focus is put on Lavaux, even though there is an offer. The promotion is more gastronomy-oriented at that time of the year.
- Compared to other areas, Lavaux is more pushed forward internationally due to its worldwide renown. Also, the proximity with Vevey and Montreux can create a greater interest, as well as the breath-taking view, wine tourism and heritage aspects.
- Cinema and influencers have a powerful impact in terms of promotion
- Wine tourism stays tend to be short, while it could be extended, as more than one day can be spent in Lavaux
- The beauty of the landscape can let people think that wine is better
- The high density and diversity of providers allow to promote authenticity and tradition
- Globally, the collaboration with promotion’s actors goes well
- The mobility offer to go to Lavaux is quite good, but could be improved in terms of global offer between Montreux and Lausanne, to avoid fragmentation and segmentation between Montreux Riviera and Lausanne

Lavaux Patrimoine Mondial, Grandvaux

Face-to-face interview on 18th April 2019 with Ms. Aline Rochat, Project Manager

Role

- Until 2013, the communes were in charge of the UNESCO-related activities
- Association including communes, wine makers, tourism representants, one cantonal representative, restaurant owners and a group of inhabitants. Globally, the collaboration is good.
- Goal: apply the site’s management plan, protecting and conveying values, sensitizing people to these values and promoting them.
- Activities
 - Promotion
 - Guided visits (Sunday visits, themed visits (i.e. photography), groups visits)
 - Technical management and research
 - Administration
 - Cultural mediation
 - Publication of brochures
 - Visitor charter currently set up
 - Calendar with opening times of wine makers
 - Wish to open a visitor centre

Tourism

- Sunday visits run from June to October (warmer season)
- Visitors’ typology:
 - Mainly Swiss (~70%)
 - Schools, classes
 - Tour operators
 - Families
- 40% of the visits are done in English, and approximately 30% in French and 30% in German

UNESCO

- Initial values linked with UNESCO have been protected, though, the increase in visitors could damage the landscape and the work behind it
- Wine makers expected more visitors, and more sales, but the second didn't happened. They understood the need to welcome visitors and improve the structures and spaces for that.
- In Switzerland, no impact on the recognition of Lavaux wines, internationally there might have been an impact. There might be a change happening, but not mandatorily linked to UNESCO
- There is an increasing interest for Lavaux, it became a "must do", people stop by. Still, there is a lack of knowledge even from the neighbouring France.
- Economically, the wine sales haven't increase as expected, though, restaurants might have seen a difference.

Events

- Lavaux Passion is born from the collaboration of different actors, including the Communauté du Vin et de la Vigne de Lavaux, to make Lavaux wines discovered, tasted, and adding cultural aspects as well.

Promotion of Lavaux

- The efficiency of promotion can't be assessed by Ms. Rochat
- The heritage is not well-known for its values, especially by tour operators. People tend not to realise what is behind the view and vineyard.
- Cultural aspects aren't emphasised in the initial training of guides. The cultural orientation of the visit depends on the sensitivity of the guide.
- Ms. Rochat would highlight the three following values:
 - Protection
 - Tradition
 - Interaction
- In its own promotion, Lavaux Patrimoine Mondial has a segmented approach for different groups (Confederation, Canton, Communes, Universities, Tourists), though without segmenting within each group.
- Lack of cohesion among the actors, lack of something that gather the inhabitants, tourists and wine makers

Appendix 8: Interviews' participants

Le Baron Tavernier, Chexbres, Mr. Gaudenz Dorta

Reason : well-known hotel and restaurant, quoted in the places visited, especially for its terrace "Le Deck".

Cave Joly, Grandvaux, Ms. Aurélia Joly

Reason : well-established wine makers, with a well-developed wine tourism offer

Montreux Riviera, Point i Chexbres, Ms. Natascha Morel

Reason : Montreux Riviera is the tourist office responsible of the area of Lavaux, and the Point i in Chexbres was advised by its central office, as it is located at the heart of one of the most touristic places.

Lavaux Express, Cully, Ms. Katya Jobin

Reason : Lavaux Express is a well-known activity, enabling the discovery of the vineyard

Vaud Oenotourisme, Mr. Yann Stucki

Reason : considering the strong wine industry focus of the area, Vaud Oenotourisme appeared as crucial in the development of wine tourism activities.

11 Terres, Epesses, Ms. Camille Grison

Reason: regrouping 11 wine makers from Epesses, the staff of 11 Terres is frequently in contact with visitors of Lavaux.

Clos du Boux – Luc Massy, Epesses, Mr. Gregory Massy

Reason : well-established wine makers, with an international orientation and a digital marketing strategy

Vinorama, Rivaz, Ms. Monica Tomba

Reason: highly touristic place, offering a large wine tasting panel, with the capacity to welcome tourists' groups

GEA Vallotton et Chanard, Lausanne, Mr. Jean-Marc Vallotton

Reason: elaborated the application of Lavaux as a UNESCO World Heritage site

Office du Tourisme du Canton de Vaud, Lausanne, Ms. Christel Porchet

Reason: in charge of the promotion of the Canton de Vaud as a whole, especially beyond the borders of the Canton

Lavaux Patrimoine Mondial, Grandvaux, Ms. Aline Rochat

Reason: responsible for the application of the management plan of Lavaux, with UNESCO-related activities, and offering guided tours of the vineyard.