

SUSTAINABLE WINE TOURISM



A GLOBAL SURVEY

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Wine tourism has been an important part of the wine industry for decades. It helps generate income while preserving and developing the cultural heritage of a wine region. Therefore, wine tourism could be the key element for the sustainable development of wine regions worldwide.

To gather reliable information on this topic, a global online survey was conducted with 1,579 wineries from more than 40 countries. Data collection took place in November 2021. In the survey, we covered topics such as "General Importance of Sustainability", "Sustainable Wine Tourism Operations", "Contribution of wine tourism activities to the sustainable development of wineries" and many other questions.

The survey results clearly show that sustainability has arrived in the wine industry and wine tourism and will undoubtedly play a significant role in the future.

We are delighted about the high number of participants, which mirrors the global interest in this topic. Enjoy reading through the results of this survey!

Yours sincerely,
The Research Team from Geisenheim and Stockholm

Chapter 2

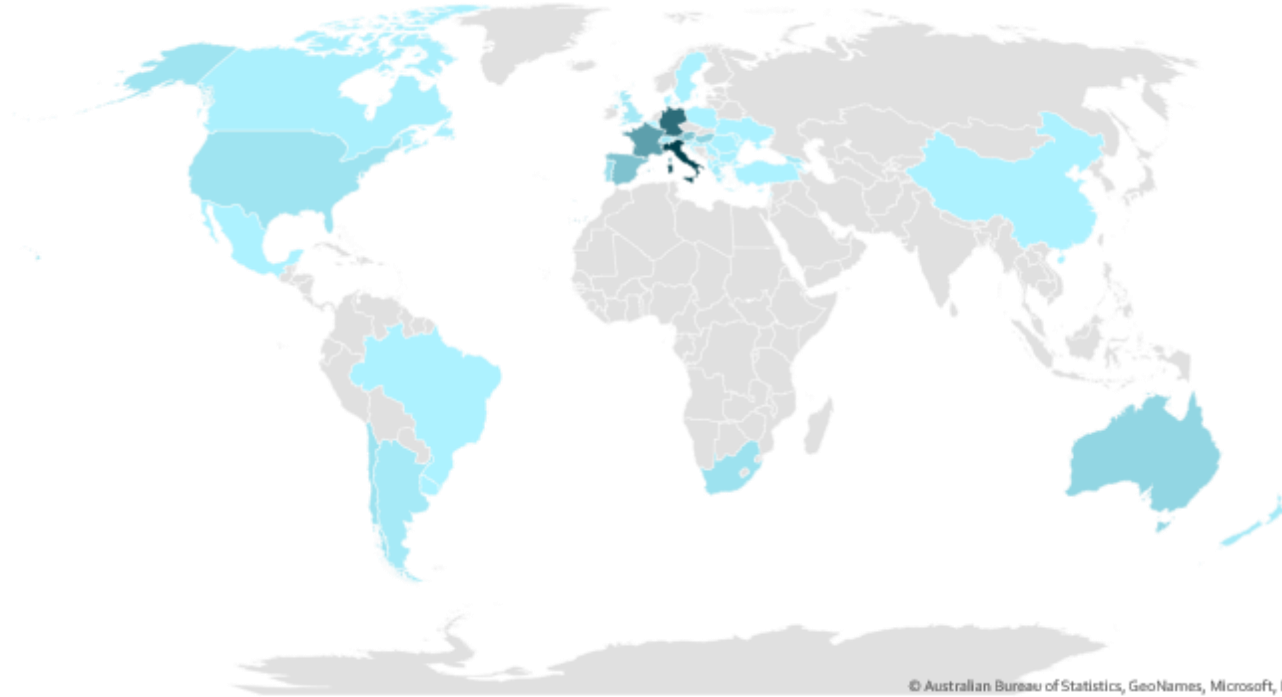
DESCRIPTION OF THE SAMPLE

Chapter 2.1

COUNTRY AND COMPANY SIZE

Country

(All wineries; N=1,579)



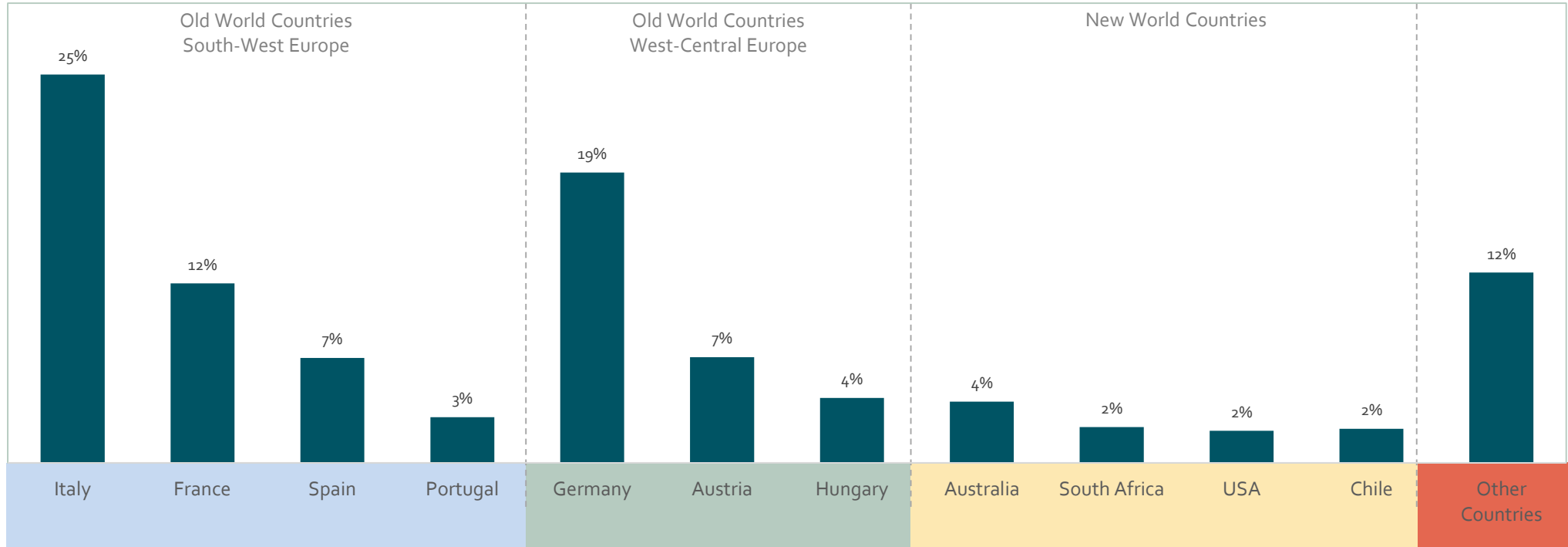
Number of wineries
participated in the survey



- A total of 1,579 wineries from 42 countries participated in the survey.
- European countries such as Italy, Germany, France, Spain participated in the survey with an above-average number of wineries.

Country

(All wineries; N=1,579; in %)



- A total of 1,579 wineries from 42 countries participated in the survey.
- 88% of the wineries surveyed are from one of the 11 displayed countries. "Other Countries" summarizes a total of 31 countries, which together represent 12 % of the survey participants.
- Most participating wineries are located in Italy (25%), Germany (19%) and France (12%).

Wine growing regions

(All wineries; N=1,579; in %)

Italy: (N=400)

Region	Percent
Piedmont	12%
Veneto	11%
Tuscany	10%
Other regions	67%

Spain: (N=108)

Region	Percent
Rioja	15%
Pendès	9%
Navarra	6%
Other regions	70%

South Africa: (N=37)

Region	Percent
Western Cape	24%
Stellenbosch	16%
Swartland	11%
Other regions	49%

Germany: (N=299)

Region	Percent
Pfalz	22%
Mosel	19%
Rheinhessen	17%
Other regions	42%

Hungary: (N=67)

Region	Percent
Tokaj	21%
Badacsony	7%
Szekszárd	7%
Other regions	65%

Chile: (N=35)

Region	Percent
Itata	31%
Colchagua	23%
Cachapoal	9%
Maipo	9%
Other regions	28%

France: (N=185)

Region	Percent
Bordeaux	15%
Loiré	13%
Languedoc-Roussillon	8%
Other regions	64%

Australia: (N=63)

Region	Percent
Barossa	19%
McLaren Vale	13%
Adelaide Hills	10%
Other regions	58%

USA: (N=33)

Region	Percent
California	48%
Oregon	21%
Washington	9%
Other regions	22%

Austria: (N=109)

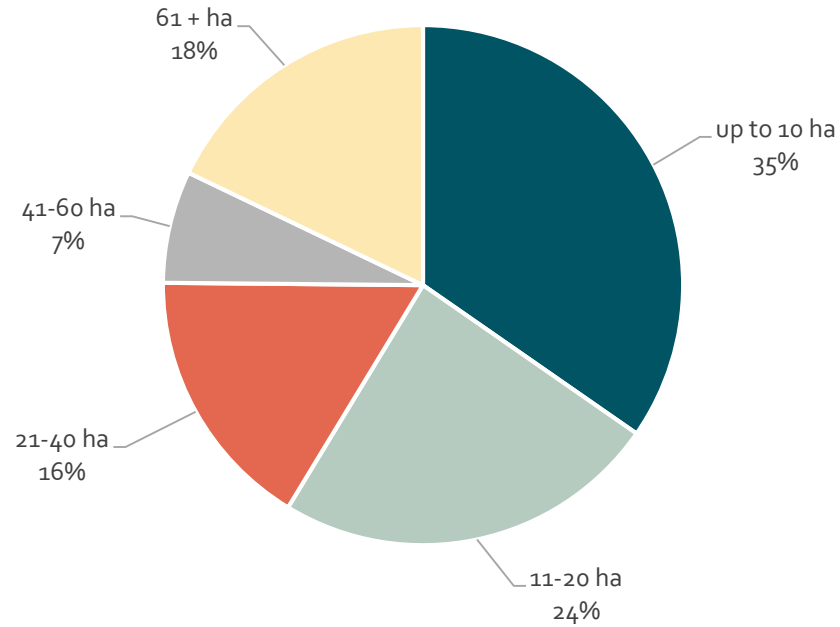
Region	Percent
Weinviertel	24%
Burgenland	13%
Kamptal	9%
Other regions	54%

Portugal: (N=47)

Region	Percent
Lisboa	21%
Alentejo	17%
Vinho Verde	15%
Other regions	47%

Size of the winery

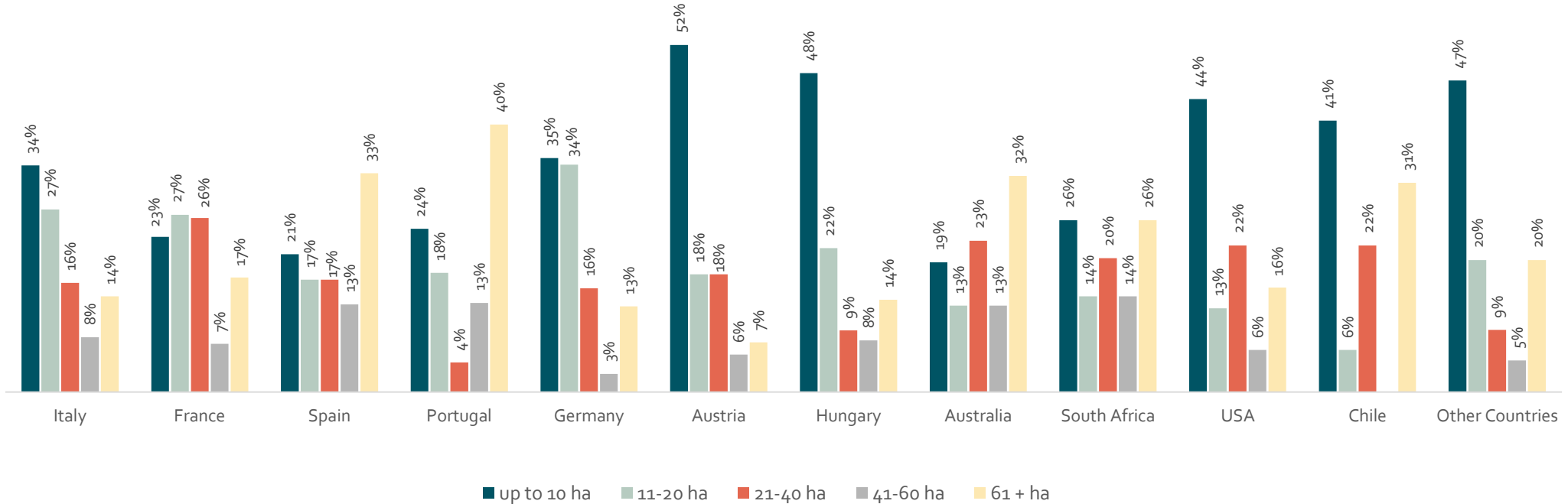
(All wineries; N= 1,579; in %)



- In terms of company size, a wide range of companies participated in the survey.
- More than half of the participants (59 %) operate small to medium-sized wineries (up to 20 hectares).
- 18% of the participants run big wineries with more than 60 hectares.

Country classified by size of the winery

(All wineries; N= 1,579; in %)



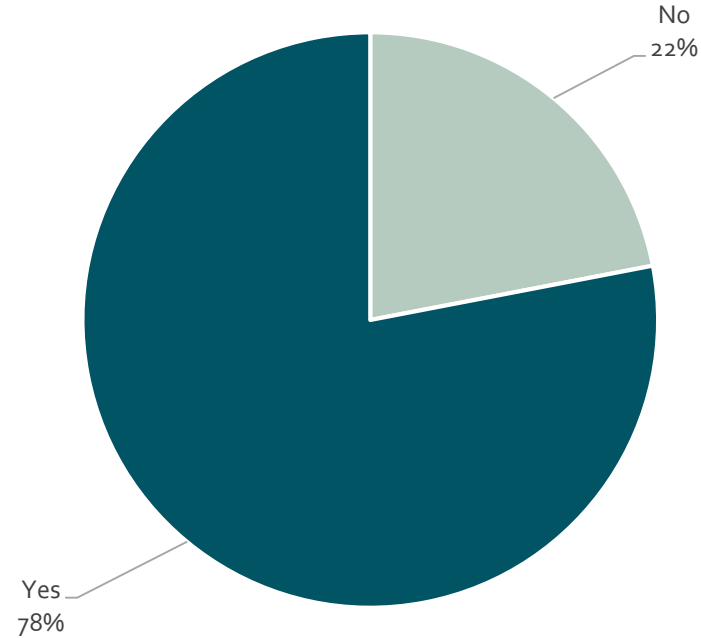
- Company size varies greatly between the participating countries of origin.
- There are many small wineries among the participants from Austria, Hungary and the USA.
- A high share of large wineries can be found in the countries Spain, Portugal, Australia, South Africa and Chile.

Chapter 2.2

SHARE OF WINERIES OFFERING WINE TOURISM ACTIVITIES

Share of wineries offering wine tourism activities

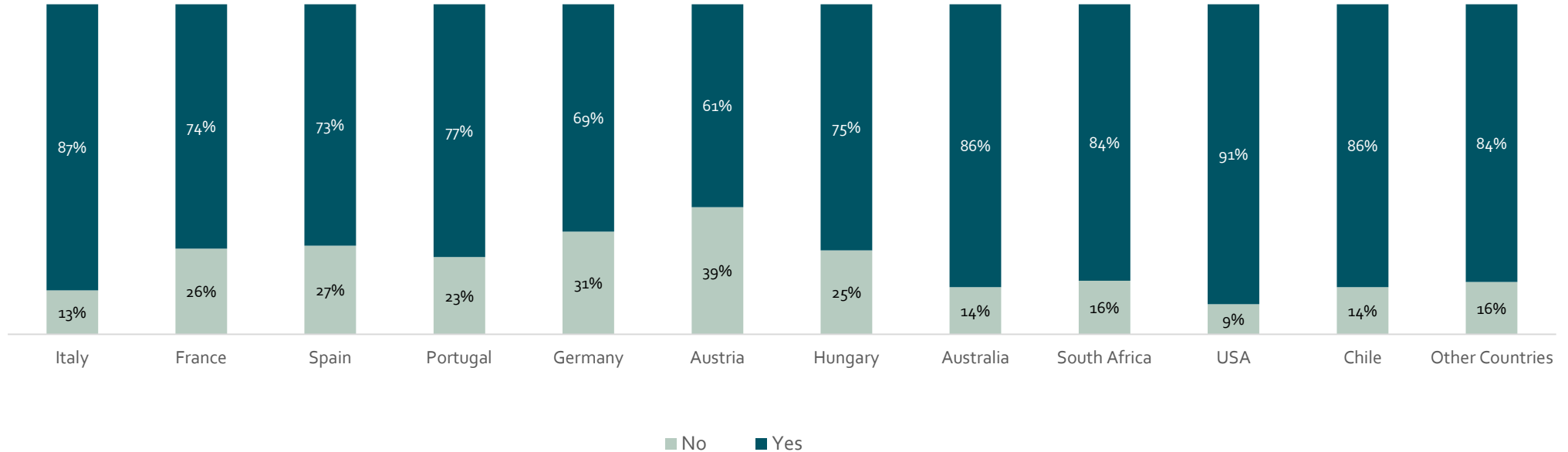
(All wineries; N=1,579; in %)



- In our sample, the vast majority of participating wineries (78%) offers wine tourism activities.
- It can be assumed that the survey was of greater interest to those wineries already active in wine tourism.

Share of wineries offering wine tourism activities by country

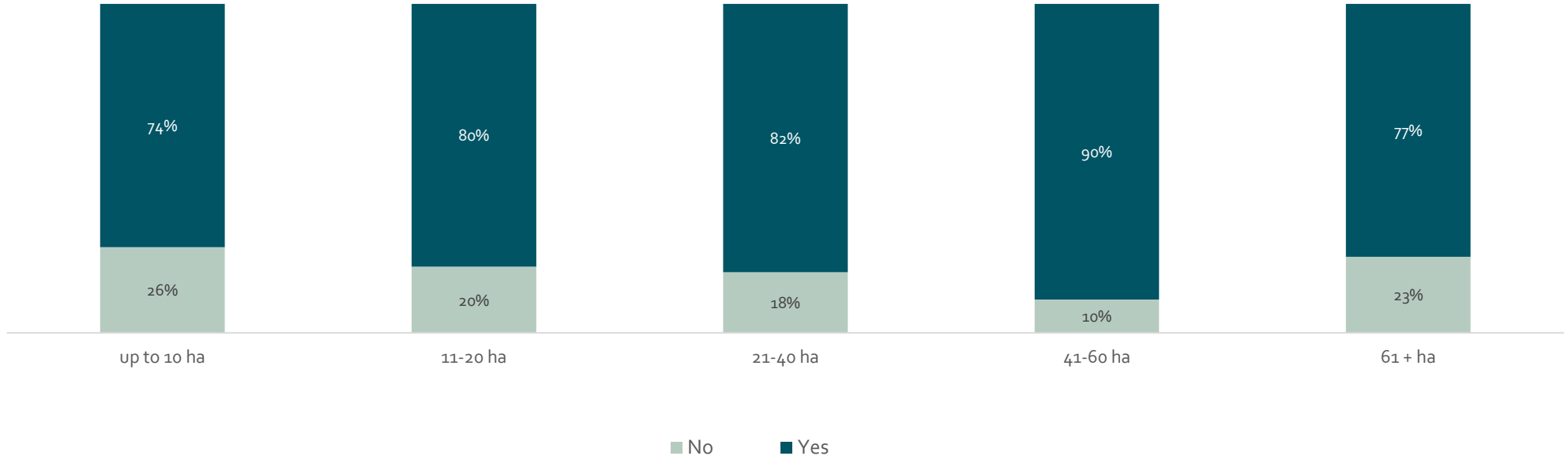
(All wineries; N=1,579; in %)



- In some countries, the share of wineries actively participating in wine tourism was higher than in others.
- In general, the share of wine tourism participants is with 85% significantly higher in the so-called New World countries (Australia, South Africa, USA, Chile) than in the European countries (exception: Italy with 87%).
- The lowest percentage of participants in wine tourism was found in Austria (61%), followed by Germany (69%) and Spain (73%).

Share of wineries offering wine tourism activities by size

(All wineries; N=1,579; in %)



- In terms of company size, few differences could be found regarding wine tourism activities offered. In our sample at least 70% of wineries offer wine tourism activities, regardless of size.
- The least wine tourism services are offered by the smallest and the largest wineries.

Chapter 3

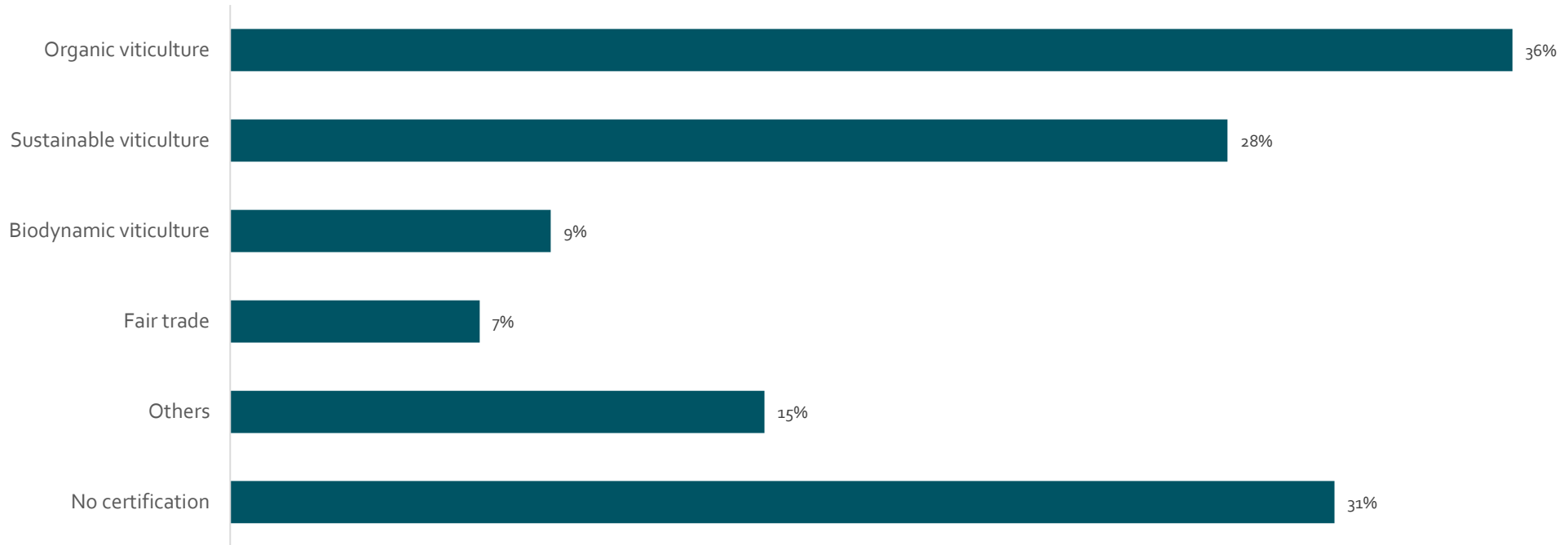
WINERIES WITH WINE TOURISM ACTIVITIES

Chapter 3.1

CERTIFICATION

Certification of wineries

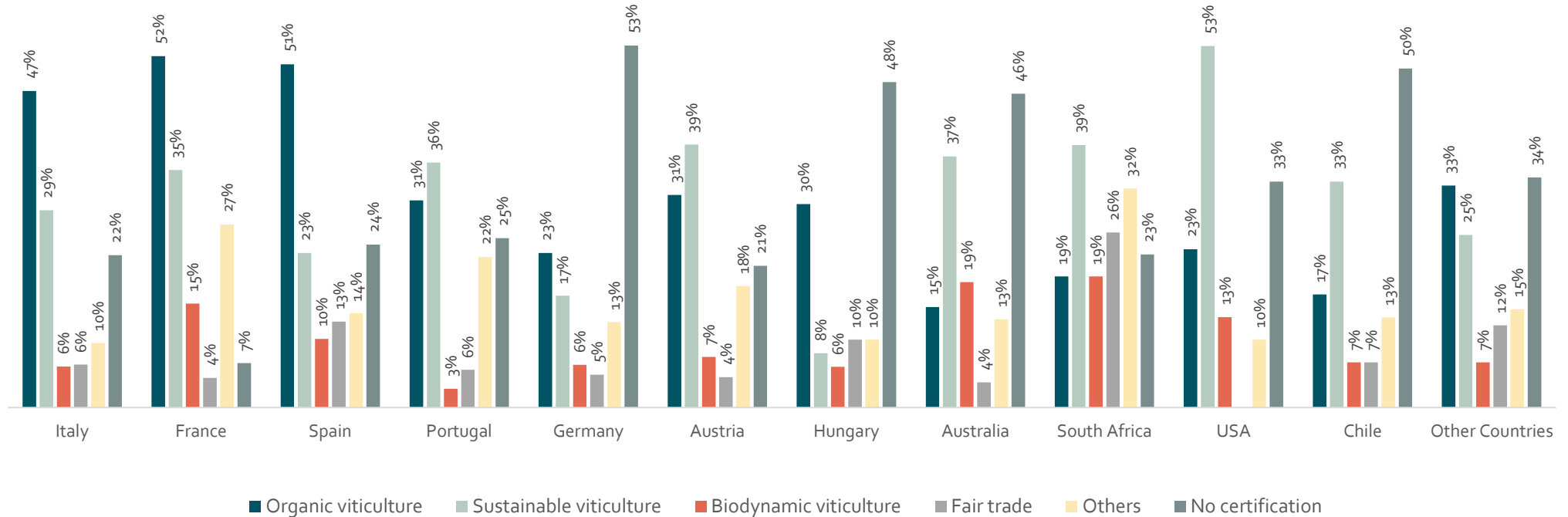
(Only with WT activities; N=1,232; in %)



- For this question, wineries could select up to two certifications.
- Almost one third (31%) of respondents stated that they had no certification at all.
- The most represented certification was organic wine production (36%), followed by sustainable viticulture (28%), biodynamic viticulture (9%) and Fair Trade (7%).
- In an open sub-question, further certifications could be named. The most frequently mentioned were Bee Friendly, Fair and Green, High Environmental Value 3d or vegan friendly.

Certification of wineries by country

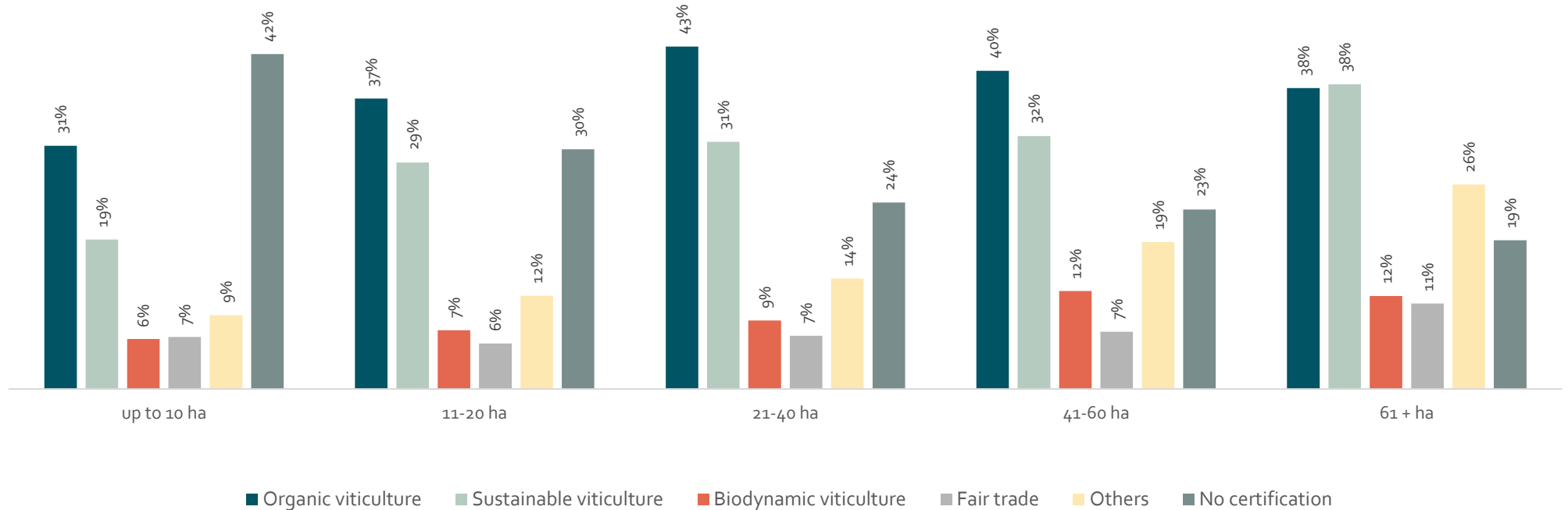
(Only with WT activities; N=1,232; in %)



- The highest proportion of non-certified wineries come from Germany (53%), Chile (50%), Hungary (48%) and Australia (46%).
- Organic certification is used particularly often in the classic European wine-growing countries France (52%), Spain (51%) and Italy (47%).
- The USA has the highest proportion of sustainably certified wineries. Other than that, sustainable certification is relatively uniformly represented at around 30%, with the exception of Hungary (8%) and Germany (17%).

Certification of wineries by size

(Only with WT activities; N=1,232; in %)



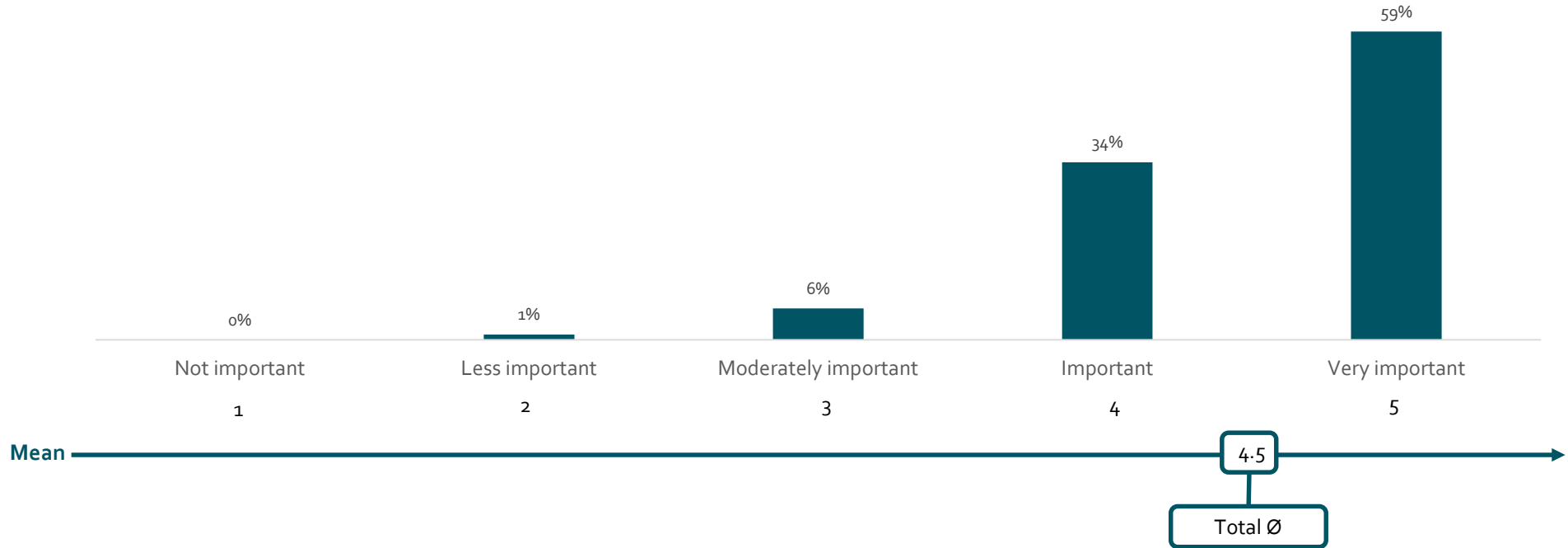
- Size matters - the larger the winery, the higher the proportion of certified wineries. In particular, the use of sustainable viticulture, biodynamic viticulture and "other" certifications increases with larger farm sizes.
- Organic certification is almost consistently the most widespread certification, but seems to be less used on the largest farms; here it is on par with the sustainable viticulture certification.

Chapter 3.2

GENERAL IMPORTANCE OF SUSTAINABILITY

General importance of sustainability

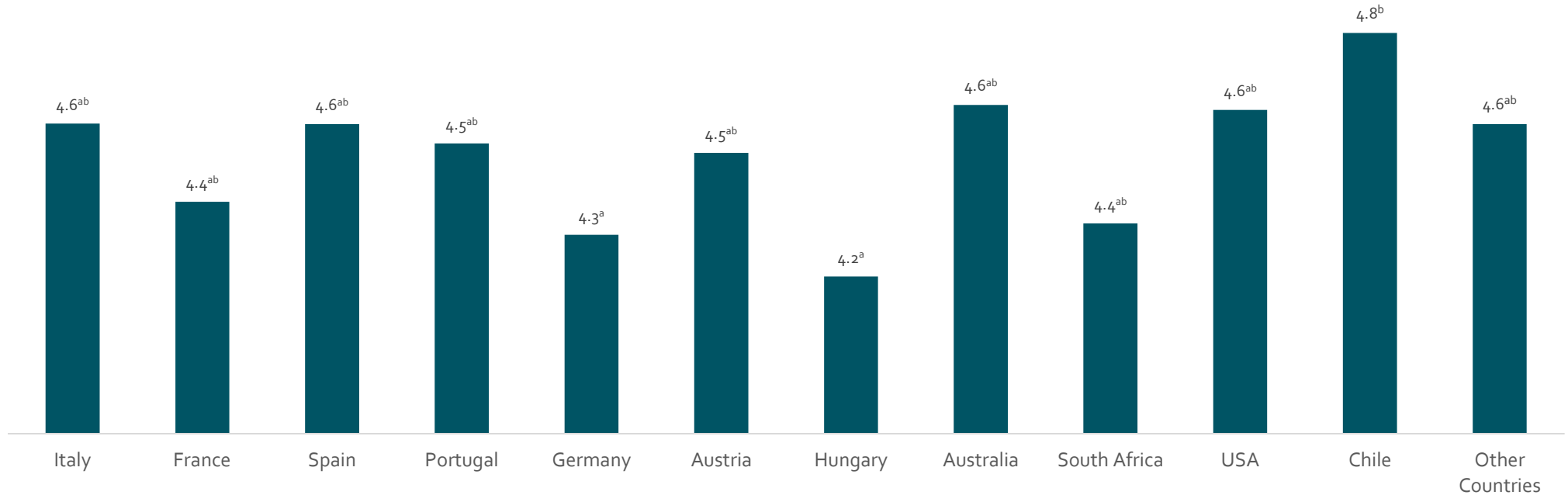
(Only with WT activities; N=1,232; in %)



- The specific question asked was: "How important is sustainability generally for your winery/company (all operations)?"
- On a scale of 5, where 1 means "not important" and 5 means "very important", the average across the surveyed wineries was 4.5.
- 93% of all wineries that participated in the survey stated that sustainability is important or very important.

General importance of sustainability by country

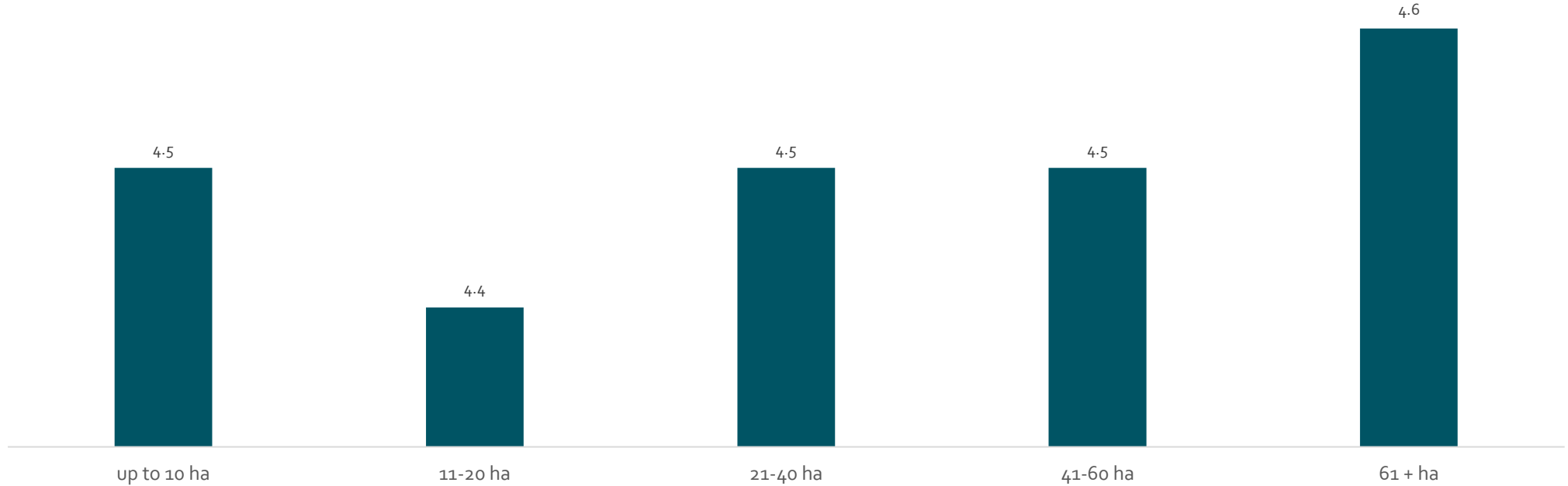
(Only with WT activities; N=1,232; mean on a 5-point scale)



- The importance of sustainability is rated highest in the country of Chile (4.8). This result is significantly higher compared to the countries Germany and Hungary.

General importance of sustainability by size

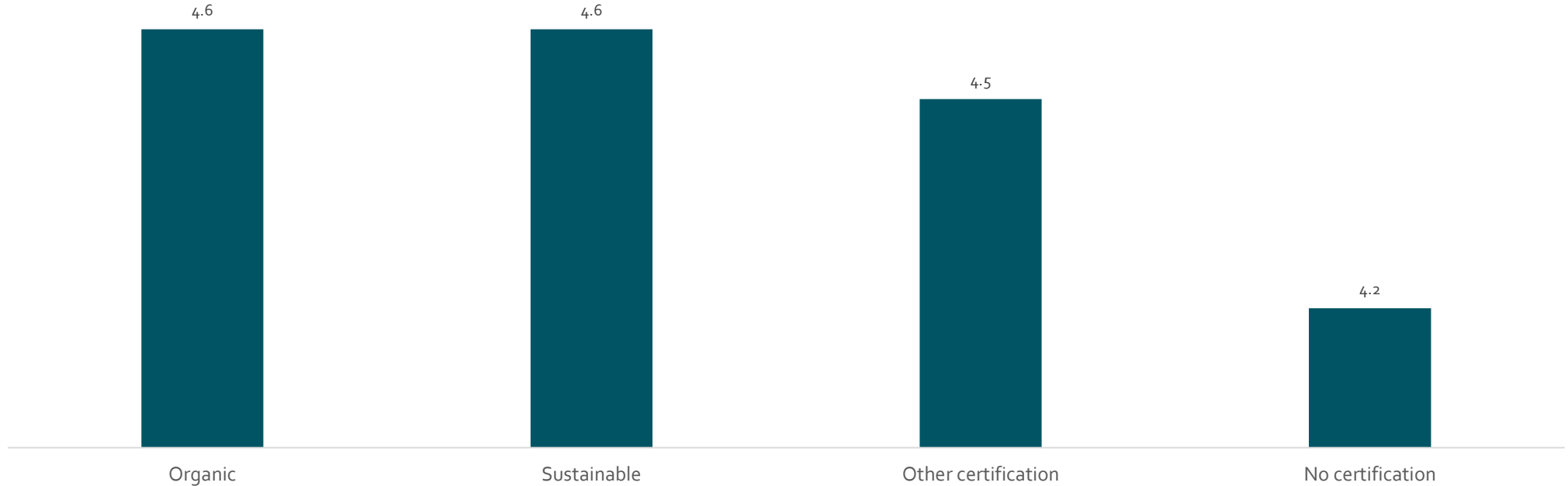
(Only with WT activities; N=1,232; mean on a 5-point scale)



- There were no significant differences between the size of a winery and the general importance of sustainability.

General importance of sustainability by certification

(Only with WT activities; N=1,232; mean on a 5-point scale)



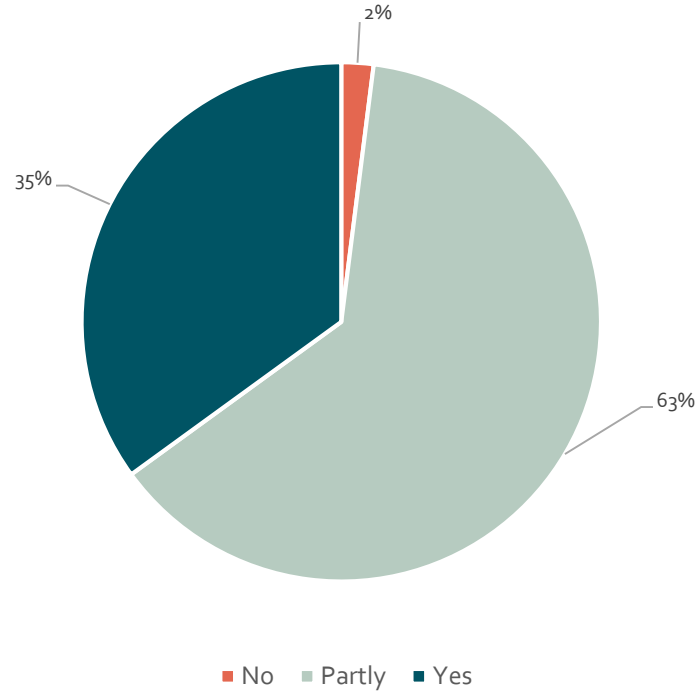
- There is also no significant differences between the certification of a winery and the general importance of sustainability.
- On a 5-point scale, the average reached 4.5.

Chapter 3.3

SUSTAINABLE WINE TOURISM OPERATIONS

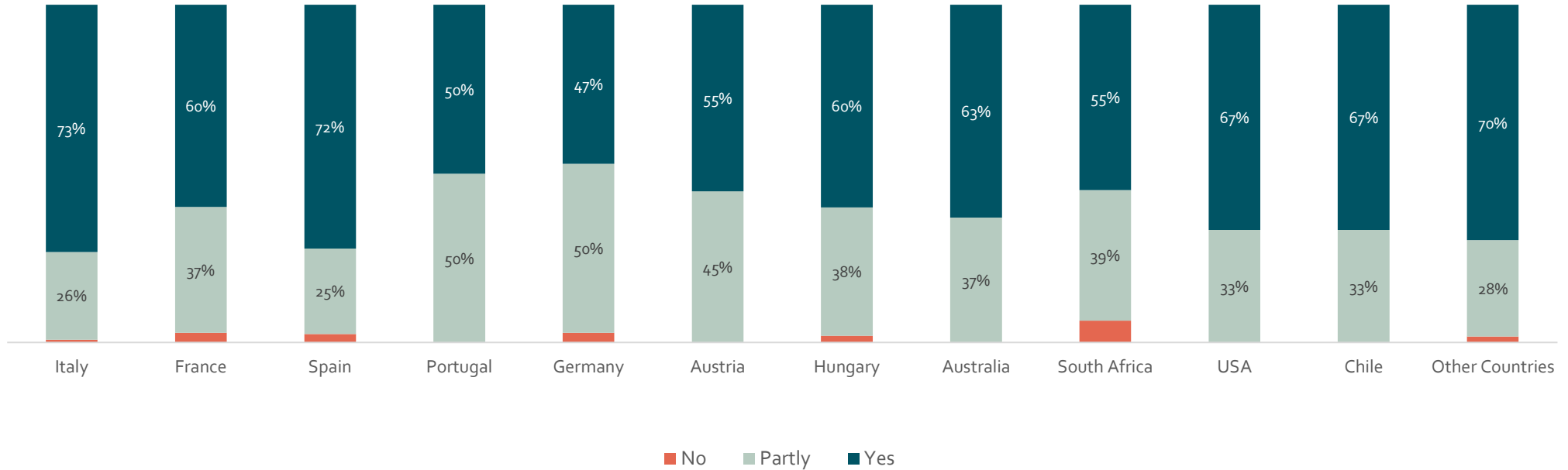
Perceived sustainability of the wine tourism operations

(Only with WT activities; N=1,232; in %)



- 63% of all wineries considered their wine tourism operations to be partly sustainable.
- Another 35% consider their operations fully sustainable.

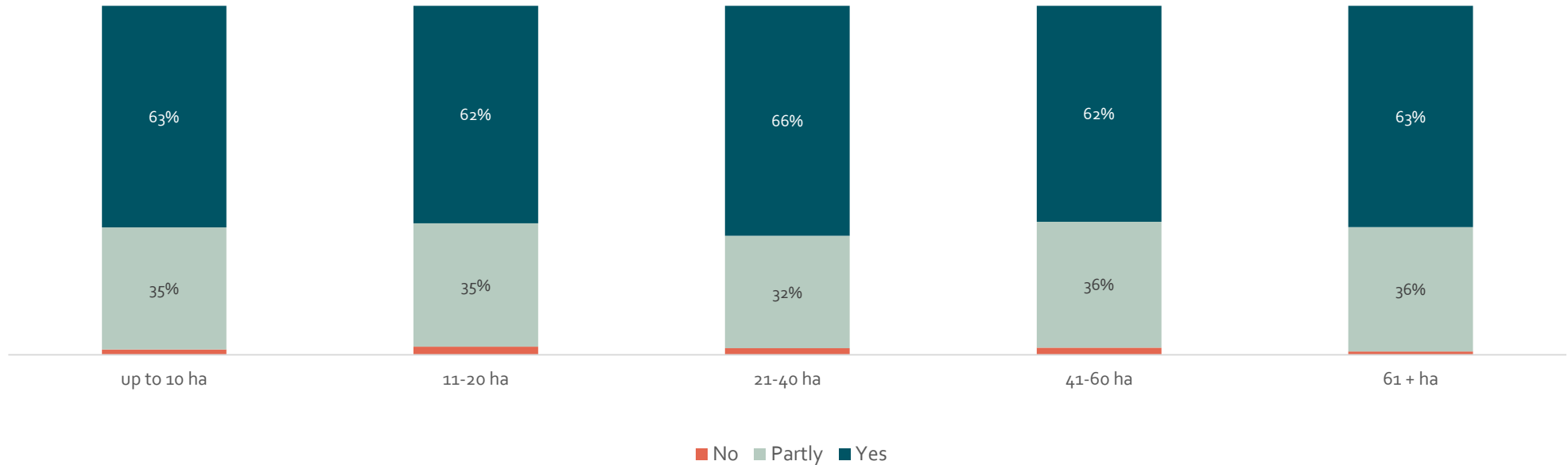
Perceived sustainability of the wine tourism operations by country (Only with WT activities; N=1,232; in %)



- Particularly respondents from Italy and Spain consider their wine tourism operations to be sustainable.
- According to the given answers, the supposedly least sustainable wine tourism operations are found in Germany and Portugal.

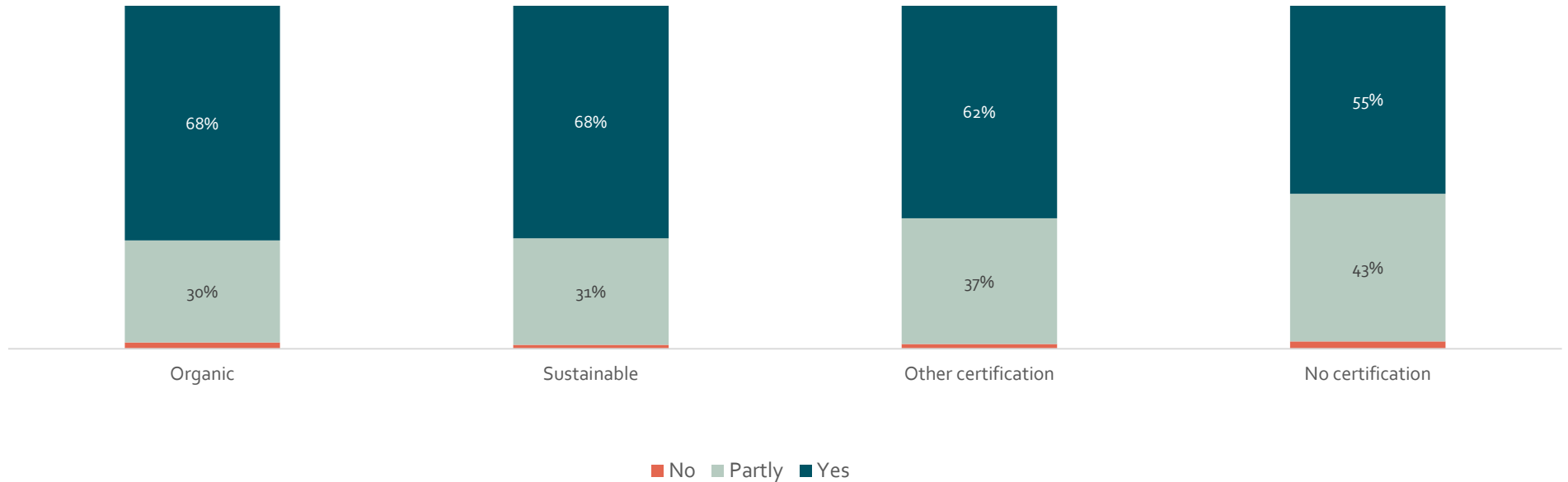
Perceived sustainability of the wine tourism operations

by size (Only with WT activities; N=1,232; in %)



- There is no significant difference between the size of a winery and the sustainability rating of the winery's tourism activity.

Perceived sustainability of the wine tourism operations by certification (Only with WT activities; N=1,232; in %)



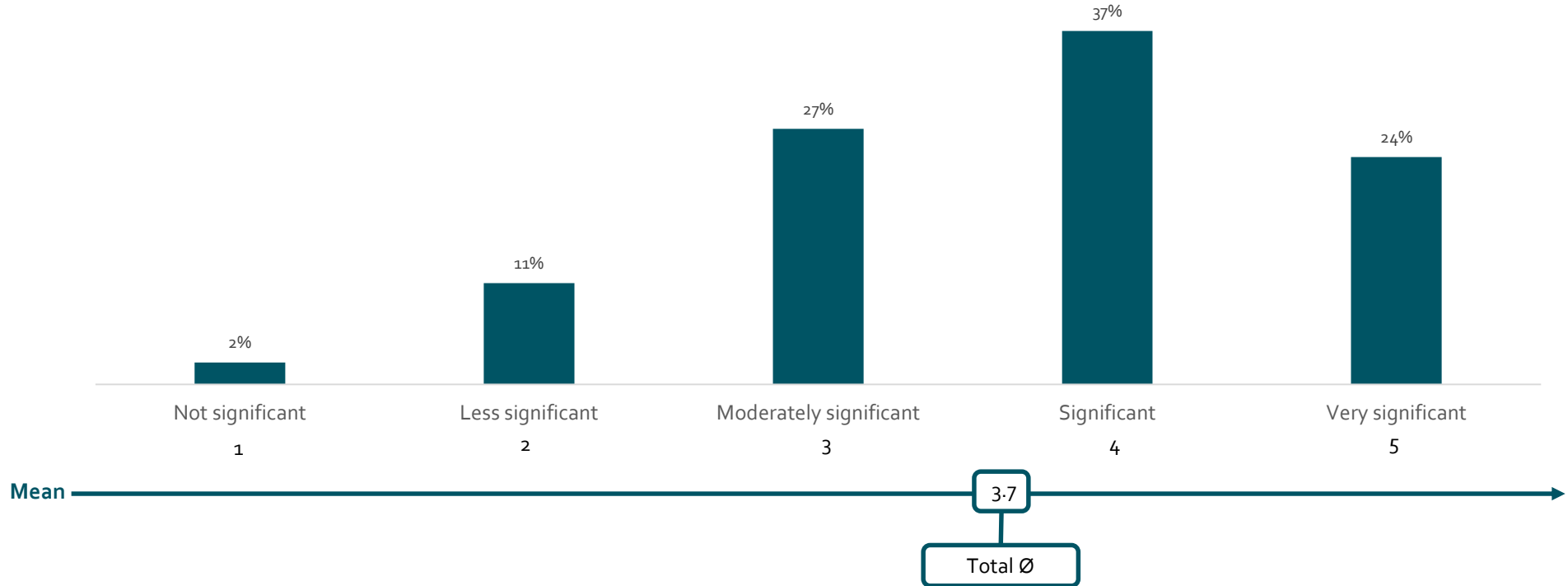
- The wineries without certification assessed their wine tourism operations as sustainable (55%) or partly sustainable (43%).
- The wineries with certification were more prone to assess their wine tourism operations as sustainable.

Chapter 3.4

CONTRIBUTION OF WINE TOURISM ACTIVITIES TO THE SUSTAINABLE DEVELOPMENT OF WINERIES

Contribution of WT activities to sus. development

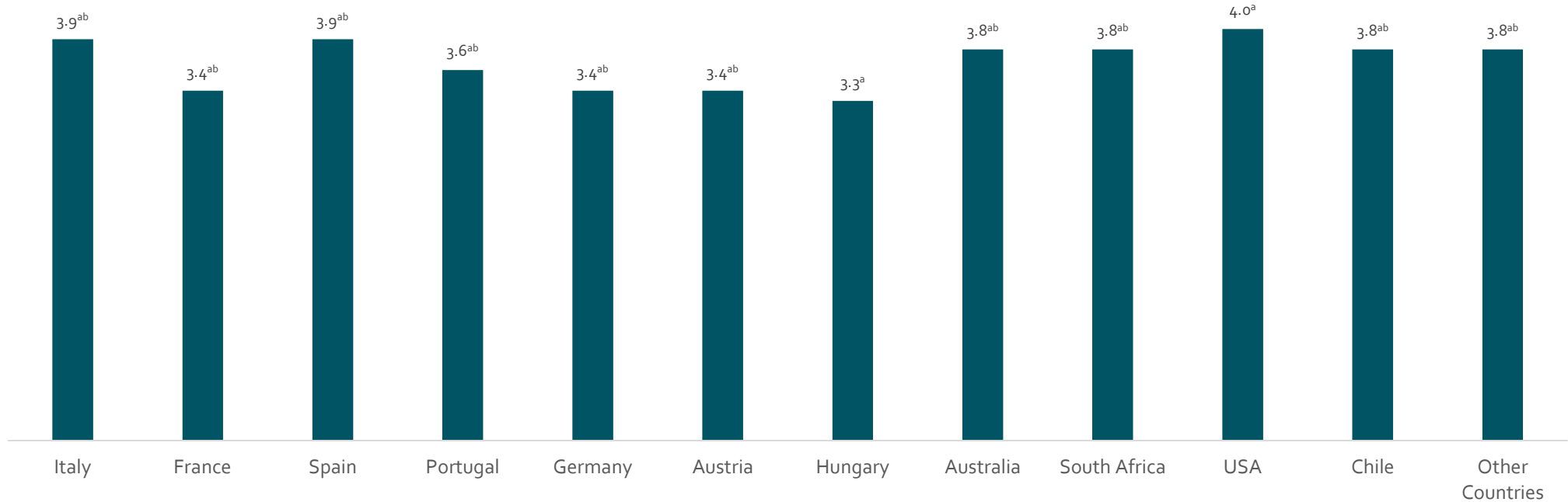
(Only with WT activities; N=1,232; in %)



- The specific question asked was: "How significant is the contribution of wine tourism activities to the entire sustainable development of your winery/company?"
- On a scale of 5, where 1 means "not important" and 5 means "very important", the average across the surveyed wineries was 3.7.
- 61% of the respondents stated that the contribution of wine tourism activities to the overall sustainable development of their company is very significant or significant.
- Only 12% indicated, that the contribution of wine tourism activities to sustainable development is not significant or less significant.

Contribution of WT activities to sus. development by country

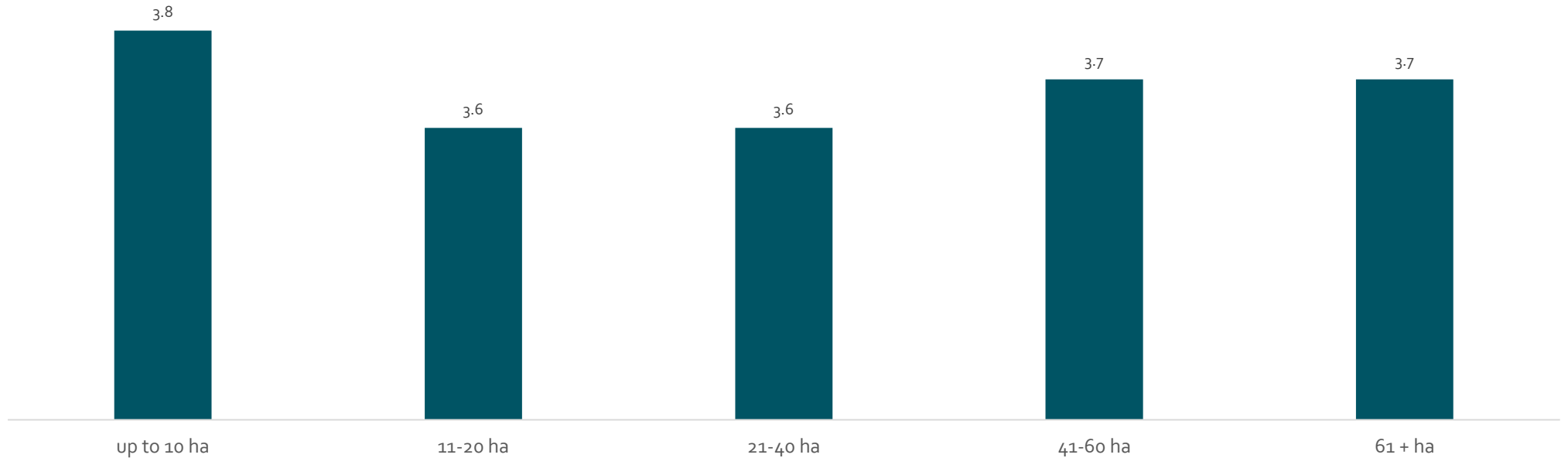
(Only with WT activities; N=1,232; mean on a 5-point scale)



- On a 5-point scale, the average reached 3.7.
- The contribution of the wine tourism activities to the overall sustainability of wineries is rated highest in the USA (mean: 4.0). This result is significantly higher compared to the country of Hungary (3.3).

Contribution of WT activities to sus. development by size

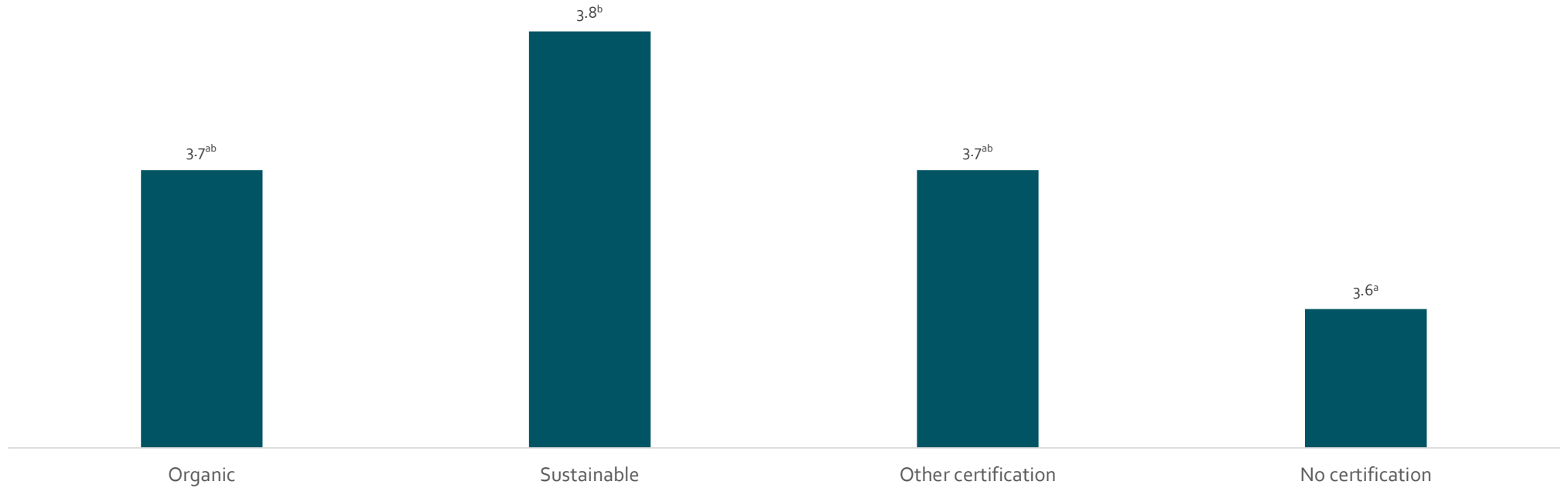
(Only with WT activities; N=1,232; mean on a 5-point scale)



- On a 5-point scale, the average reached 3.7.
- There are no significant differences between the size of a winery and the contribution of wine tourism activities to the sustainable development of the wineries.

Contribution of WTA to sus. development by certification

(Only with WT activities; N=1,232; mean on a 5-point scale)



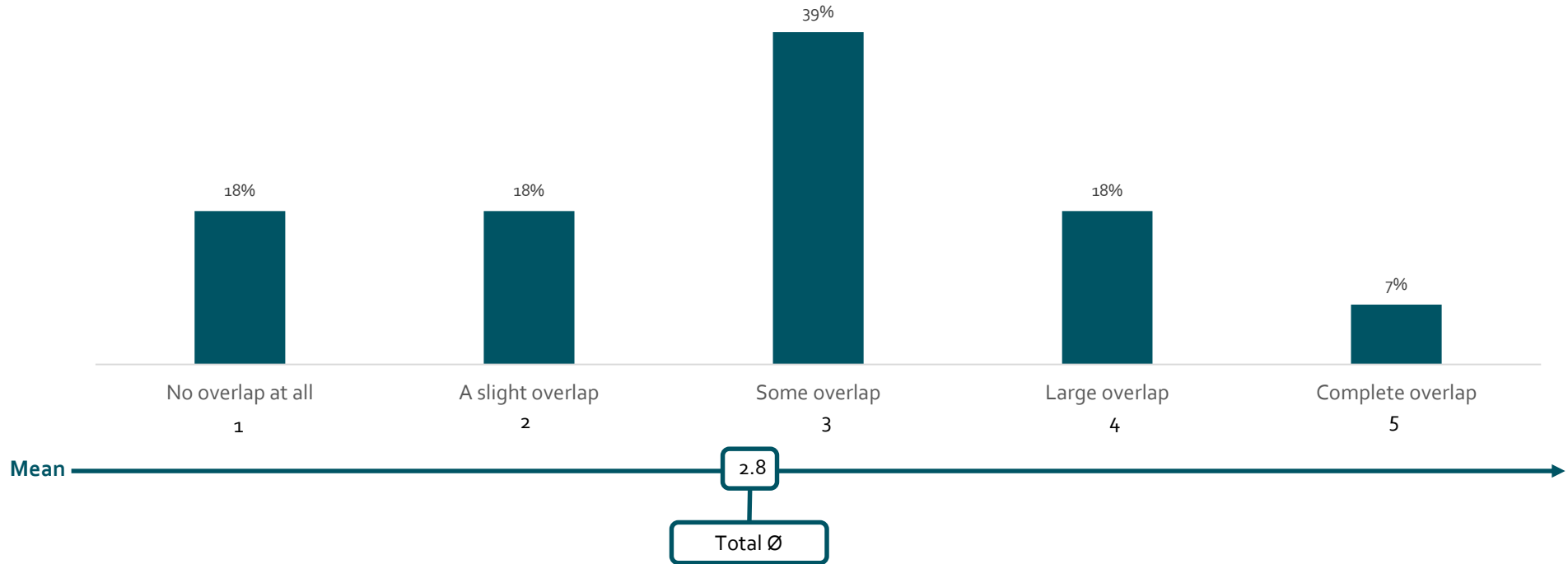
- On a 5-point scale, the average reached 3.7.
- Wineries without certification fell well below the average, with 3.6.
- Wineries with a sustainable viticulture certification landed well above average, with 3.8.

Chapter 3.5

OVERLAP BETWEEN SUSTAINABLE WINE PRODUCTION AND WINE TOURISM

Overlap between sus. wine production and WT

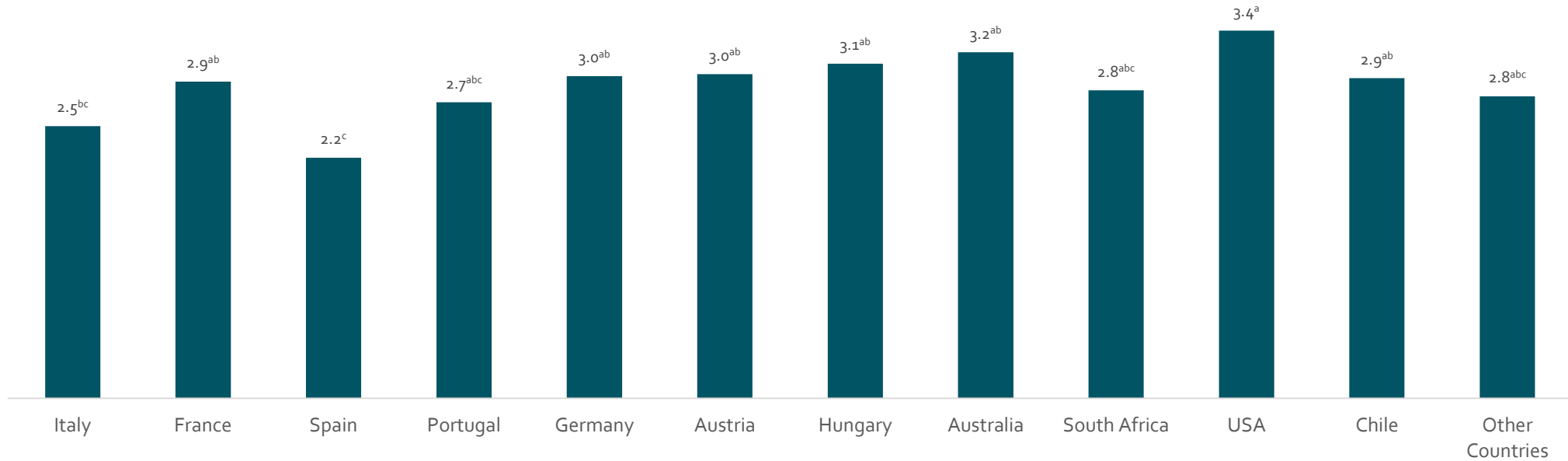
(Only with WT activities; N=1,232; in %)



- The specific question asked was: "Is there an overlap of activities between sustainable wine production and sustainable wine tourism in your winery?"
- On a scale of 5, where 1 means "No overlap at all" and 5 means "complete overlap", the average across the surveyed wineries was 2.8.
- A quarter of the respondents (25%) estimated that there is a complete or large overlap between sustainable wine production and wine tourism.
- 18% of the wineries think that there is no overlap at all between sustainable wine production and wine tourism.

Overlap between sus. wine production and WT by country

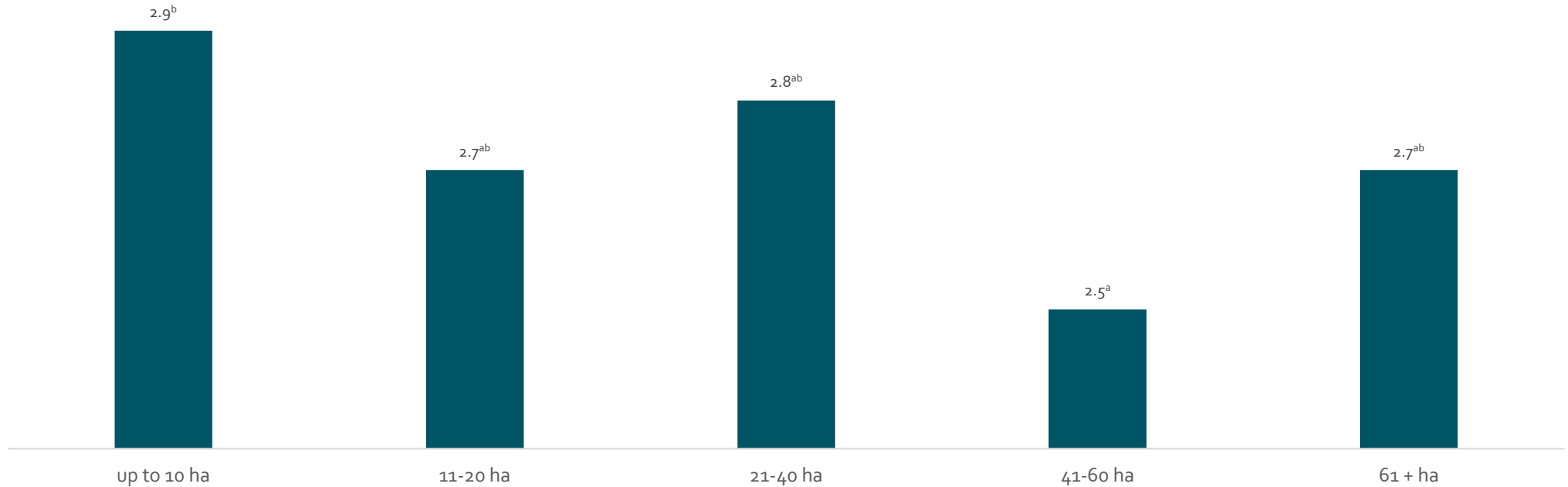
(Only with WT activities; N=1,232; mean on a 5-point scale)



- On a 5-point scale, the average reached 2.8.
- With a mean of 3.4, wineries in the US see the biggest overlap between sustainable wine production and sustainable wine tourism.
- Spain sees the lowest overlap with a mean of 2.2. With the exception of Italy, this value is significantly lower than in all other countries.
- Wineries in Spain and Italy consider the overlap significantly smaller than wineries France, Germany, Austria, Hungary, Australia, USA and Chile.

Overlap between sus. wine production and WT by size

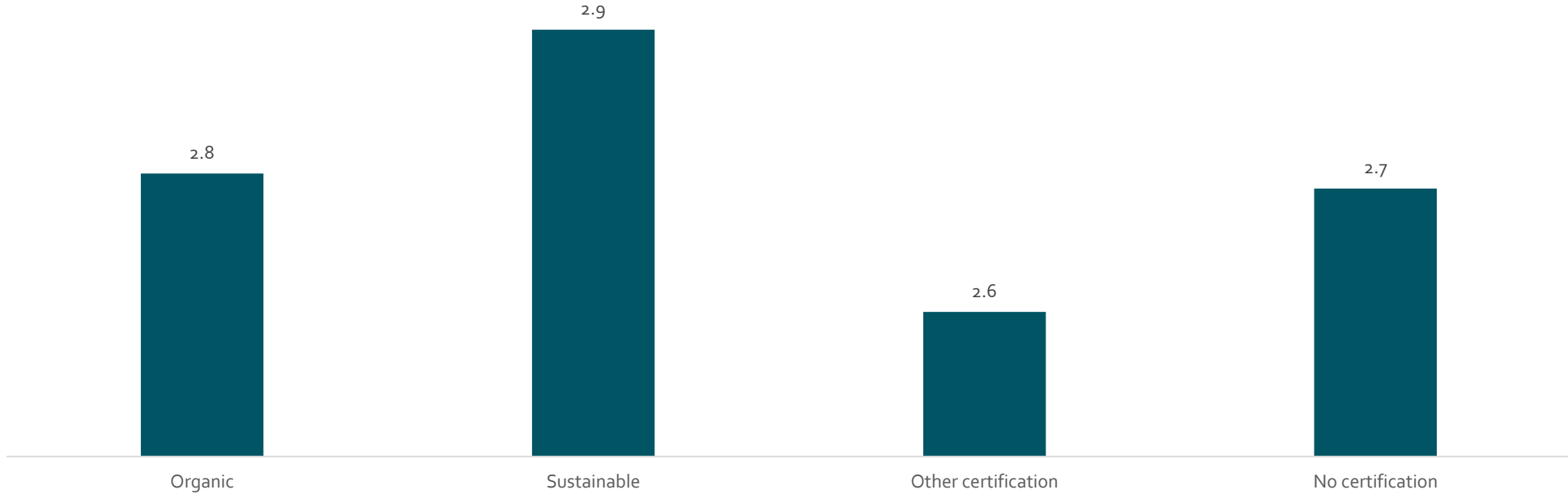
(Only with WT activities; N=1,232; mean on a 5-point scale)



- On a 5-point scale, the average reached 2.8.
- Wineries with a size from 41-60 ha are well below this average with 2.5.
- Wineries with a size from up to 10 ha are well above this average with 2.9.

Overlap between sus. wine production and WT by certification

(Only with WT activities; N=1,232; mean on a 5-point scale)



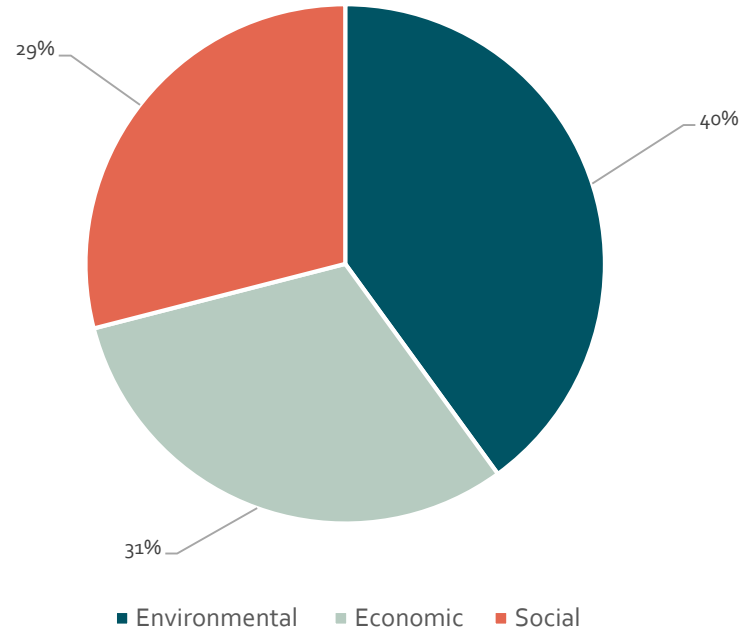
- On a 5-point scale, the average reached 2.8.
- There are no significant differences between certified and non-certified wineries.

Chapter 3.6

THREE-PILLAR MODEL AND SUSTAINABLE WINE TOURISM

Importance of three pillars in sus. WT

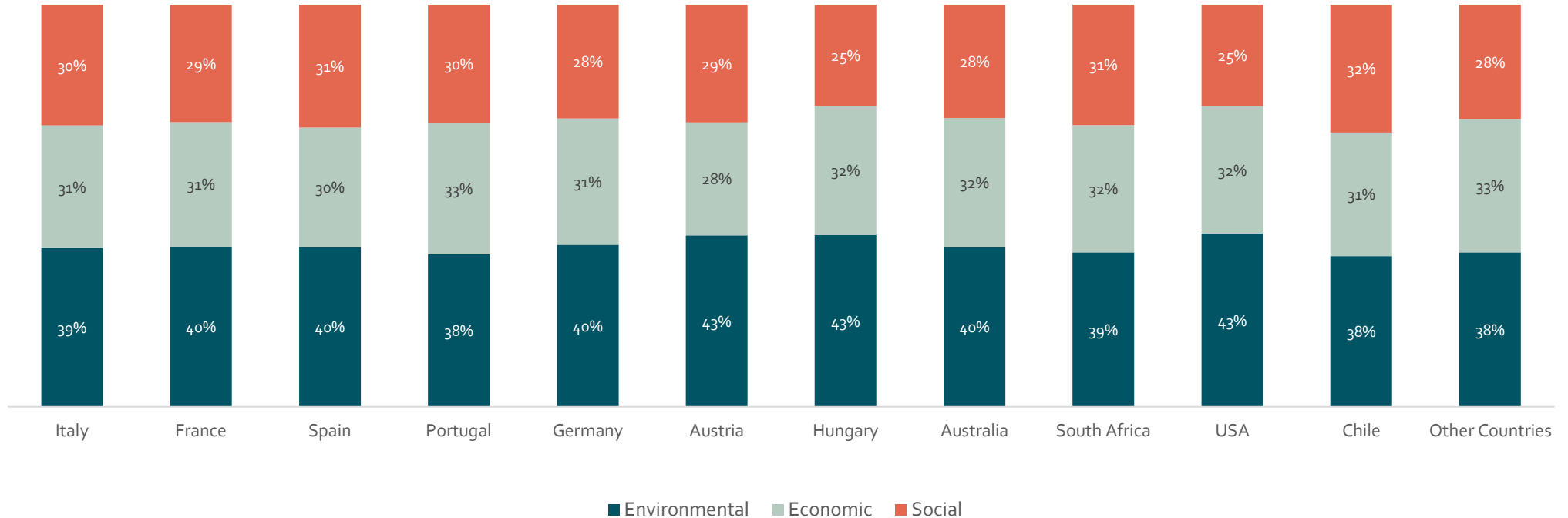
(Only with WT activities; N=1,232; in %)



- According to the respondents, environment is the most important pillar of sustainable wine tourism, at 40% of given answers.
- The importance of the social and economic pillars is rated similarly, at 29 and 31% respectively.

Importance of three pillars in sus. WT by country

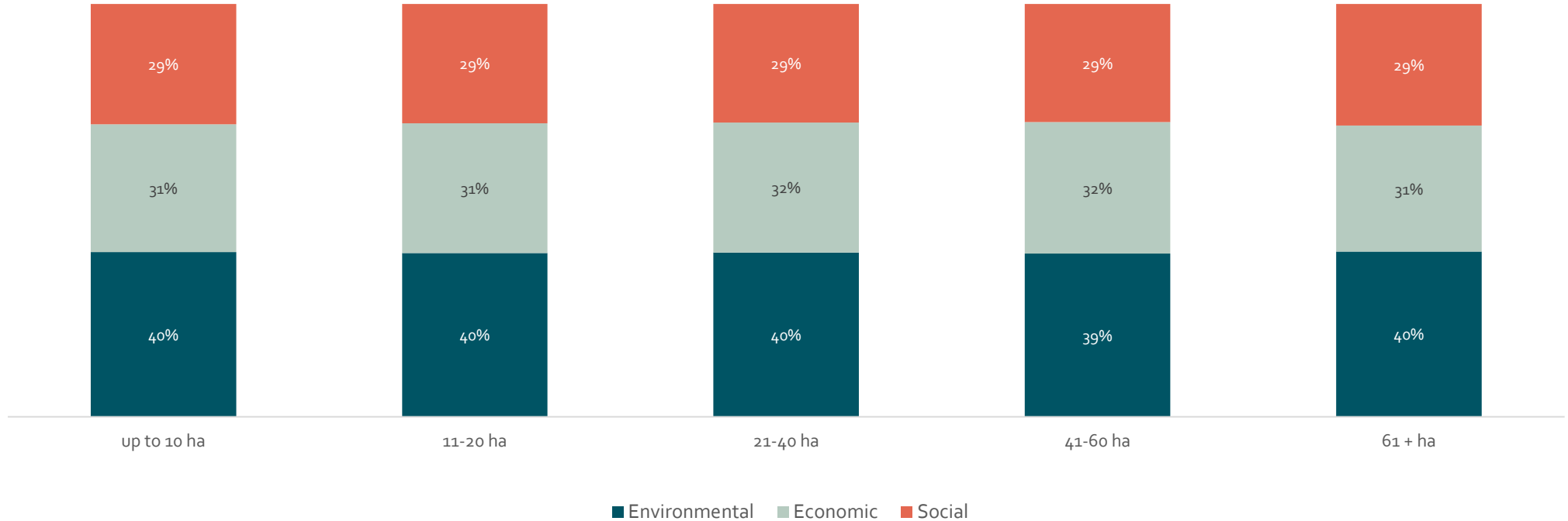
(Only with WT activities; N=1,232; in %)



- Across all countries, the environmental pillar is rated most important, at around 40%.
- The social pillar is perceived as more important than the economic pillar in only three countries (Portugal, Austria and Chile).

Importance of three pillars in sus. WT by size

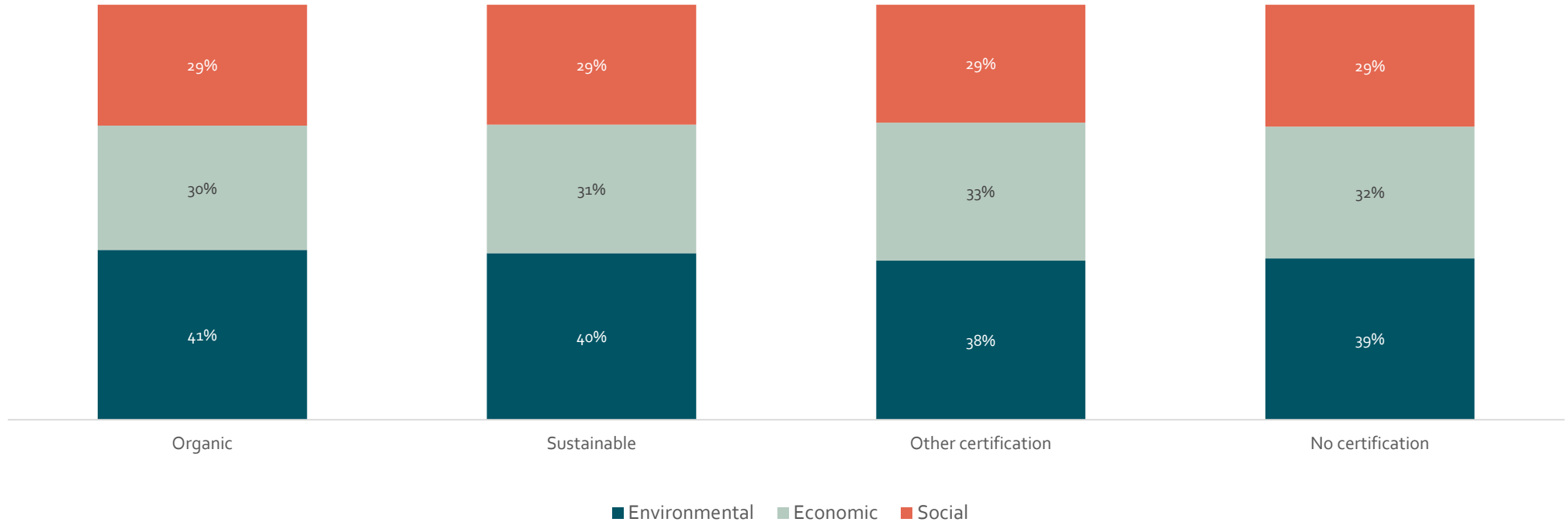
(Only with WT activities; N=1,232; in %)



- Across all company sizes, the importance of the environmental pillar remains stable at 40%.

Importance of three pillars in sus. WT by certification

(Only with WT activities; N=1,232; in %)



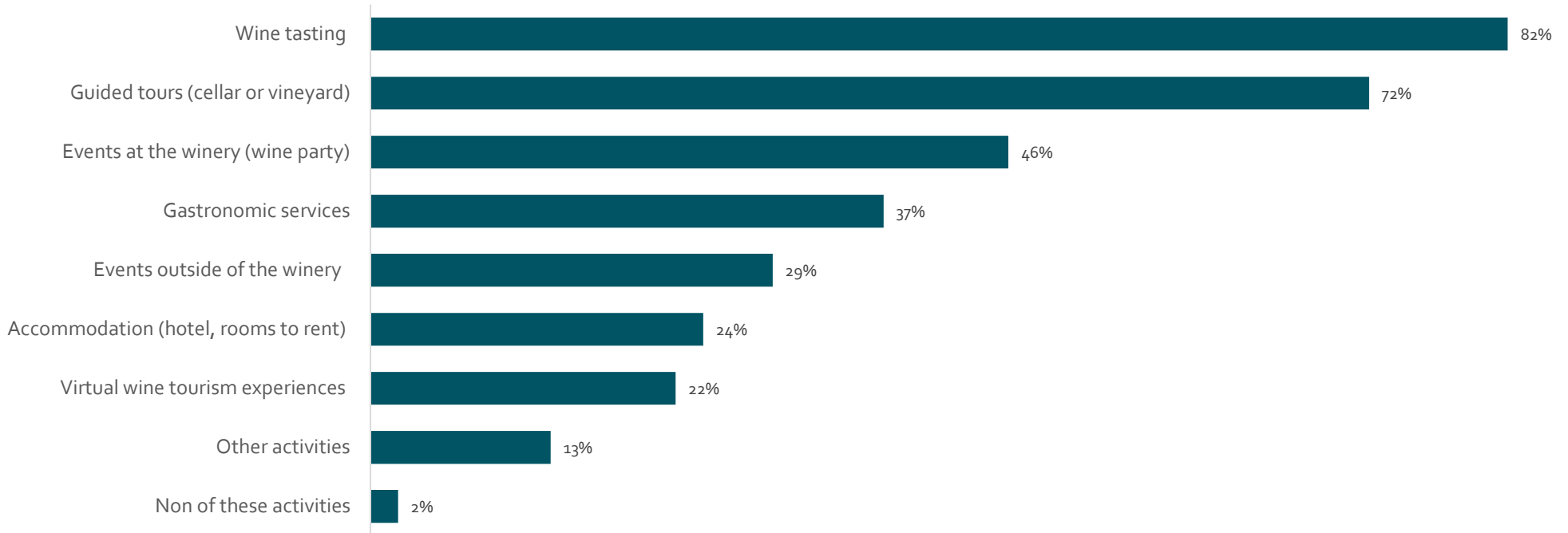
- Broken down by certification, the environmental pillar is still judged as the most important pillar for sustainability wine tourism by 40% of respondents.

Chapter 3.7

WINE TOURISM ACTIVITIES

Wine tourism activities

(Only with WT activities; N=1,232; in %)



- The most common wine tourism offers are wine tasting (82%) and guided tours (72%).
- The least frequently offered services are accommodation (24%) and virtual wine tourism experiences (22%).

Wine tourism activities by country

(Only with WT activities; N=1,232; in %)

%	Italy	France	Spain	Portugal	Germany	Austria	Hungary	Australia	South Africa	USA	Chile	Other Countries
Wine tasting*	84	80	78	86	77	78	84	80	84	93	63	85
Guided tours (cellar or vineyard)*	77	73	82	72	68	73	68	52	55	37	77	76
Gastronomic services*	32	28	35	44	36	48	48	41	39	20	40	45
Events at the winery (wine party)*	42	39	34	36	54	45	46	61	35	67	43	50
Events outside of the winery*	22	20	33	33	44	39	44	35	32	20	13	25
Accommodation (hotel, rooms for rent)*	26	23	11	17	29	34	28	20	16	10	17	24
Virtual wine tourism experiences*	13	11	24	19	36	24	18	33	32	53	33	18

- Wine tastings are offered most in USA (93%) and least in Chile (63%).
- Guided tours are offered most in Spain (82%) and least in USA (37%).
- Gastronomic services are offered most in Austria and Hungary (each 48%) and least in Italy (32%).
- Events at the winery are offered most in USA (67%) and least in Spain (34%).
- Events outside of the winery are offered most in Germany (44%) and least in Chile (13%).
- Accommodation is offered most in Austria (34%) and least in USA (10%).
- Virtual wine tourism experiences are offered most in USA (53%) and least in France (11%).

* indicates significant differences between the categories

Wine tourism activities by size

(Only with WT activities; N=1,232; in %)

%	up to 10 ha	11-20 ha	21-40 ha	41-60 ha	61 + ha
Wine tasting*	83	86	78	85	73
Guided tours (cellar or vineyard)	74	70	71	72	73
Gastronomic services	38	36	36	31	37
Events at the winery (wine party)*	41	47	47	41	55
Events outside of the winery*	22	34	29	30	35
Accommodation (hotel, rooms for rent)	25	27	25	20	19
Virtual wine tourism experiences*	18	19	23	26	32

- Wine tastings are offered most by wineries in the size category of 11-20 ha (86%) and least by wineries in the size category of 61 + ha (73%).
- Guided tours are offered most by wineries in the size category of up to 10 ha (74%) and least by wineries in the size category of 11-20 ha (70%).
- Gastronomic services are offered most by wineries in the size category of up to 10 ha (38%) and least by wineries in the size category of 41-60 ha (31%).
- Events at the winery are offered most by wineries in the size category of 61 + ha (55%) and least by wineries in the size category of up to 10 ha and 41-60 ha (each 41%).
- Events outside of the winery are offered most by wineries in the size category of 61 + ha (35%) and least by wineries in the size category of up to 10 ha (22%).
- Accommodation is offered most by wineries in the size category of 11-20 ha (27%) and least by wineries in the size category of 61 + ha (19%).
- Virtual wine tourism experiences are offered most by wineries in the size category of 41-60 ha (26%) and least by wineries in the size category of up to 10 ha (18%).

* indicates significant differences between the categories

Wine tourism activities by certification

(Only with WT activities; N=1,232; in %)

%	Organic	Sustainable	Other certification	No certification
Wine tasting	83	81	83	80
Guided tours (cellar or vineyard)	74	75	69	69
Gastronomic services	38	36	31	37
Events at the winery (wine party)	44	45	44	49
Events outside of the winery	27	28	35	31
Accommodation (hotel, rooms for rent)	26	20	26	24
Virtual wine tourism experiences	21	24	21	22

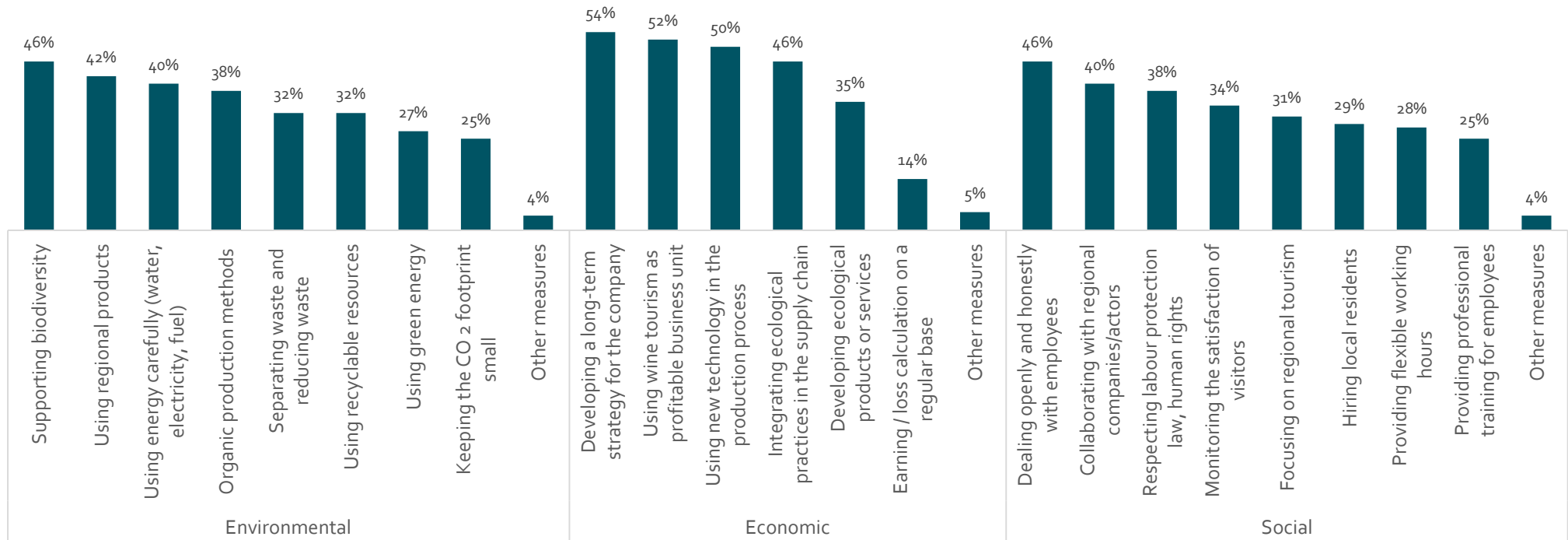
- In the table the smallest (red) and largest (green) number is displayed according to each row.
- By certification also the classic wine tourism activities, like wine tasting and guided tours the most popular.

Chapter 3.8

MEASURES CONTRIBUTING TO SUSTAINABLE WINE TOURISM

Measures contributing to sust. WT

(Only with WT activities; N=1,232; in %)



- In the environmental pillar, "Supporting biodiversity" (46%) is the most effective and "Keeping the CO₂ footprint small" (25%) the least effective measure.
- In the economic pillar, "Developing a long-term-strategy for the company" (54%) is the most effective and "Earning / loss calculation on a regular base" (14%) the least effective measure.
- In the social pillar, "Dealing honestly and openly with employees" (46%) is the most effective and "Providing professional training for employees" (25%) the least effective measure.

Measures contributing to sust. WT by country

(Only with WT activities; N=1,232; in %)

%		Italy	France	Spain	Portugal	Germany	Austria	Hungary	Australia	South Africa	USA	Chile	Other Countries
Environmental	Supporting biodiversity*	41	62	43	36	52	33	32	48	58	43	50	42
	Using regional products*	35	41	44	39	51	70	46	35	32	20	20	47
	Using energy carefully (water, electricity, fuel)*	38	31	39	44	47	42	34	39	45	63	50	38
	Organic production methods*	39	52	52	25	26	28	48	30	26	23	57	42
	Separating waste and reducing waste*	35	35	22	56	27	25	38	41	29	37	30	29
	Using recyclable resources	33	29	34	50	29	34	22	39	19	33	30	36
	Using green energy*	36	12	20	31	21	27	28	35	39	40	33	24
	Keeping the CO ₂ footprint small*	22	21	27	19	32	39	16	26	23	30	17	22
Other measures	4	5	4	3	5	4	2	4	3	7	3	4	
Economic	Developing a long-term strategy for the company*	48	58	56	50	58	48	46	72	68	57	33	61
	Using wine tourism as profitable business unit	48	49	53	58	49	51	56	59	74	63	60	55
	Using new technology in the production process	52	39	49	36	55	63	46	48	48	40	47	52
	Integrating ecological practices in the supply chain	49	50	48	56	41	45	36	43	39	50	57	44
	Developing ecological products or services*	39	39	47	47	28	39	38	19	6	23	40	36
	Earning / loss calculation on a regular base*	8	15	11	11	18	18	10	26	29	30	10	13
	Other measures	5	2	3	6	7	3	8	9	0	10	7	4
Social	Dealing openly and honestly with employees*	45	47	49	44	53	60	32	46	48	40	17	38
	Collaborating with regional companies/ actors*	36	41	53	47	43	51	48	37	13	53	47	29
	Respecting labour protection law, human rights*	39	49	35	44	33	39	14	35	61	27	60	34
	Monitoring the satisfaction of visitors*	41	34	30	31	26	22	26	30	23	43	27	42
	Focusing on regional tourism*	23	29	20	33	32	39	30	50	26	33	27	41
	Hiring local residents*	23	20	28	50	22	13	48	31	68	47	63	39
	Providing flexible working hours*	27	26	33	17	39	33	32	31	13	30	10	21
	Providing professional training for employees	45	47	49	44	53	60	32	46	48	40	17	38
	Other measures	4	2	4	0	5	3	2	6	3	7	3	4

- In the table the smallest (red) and largest (green) number is displayed according to each row.
- As can be seen from the table, the measures of effectiveness for sustainable wine tourism are relatively similar across countries.

Measures contributing to sust. WT by size

(Only with WT activities; N=1,232; in %)

%		up to 10 ha	11-20 ha	21-40 ha	41-60 ha	61 + ha
Environmental	Supporting biodiversity*	49	44	47	47	42
	Using regional products	44	42	44	41	42
	Using energy carefully (water, electricity, fuel)	41	43	38	38	39
	Organic production methods	37	38	45	33	35
	Separating waste and reducing waste	31	34	32	31	32
	Using recyclable resources	28	31	31	35	39
	Using green energy	26	25	28	27	32
	Keeping the CO ₂ footprint small	24	22	27	22	28
	Other measures*	4	5	1	2	8
Economic	Developing a long-term strategy for the company*	47	53	61	58	65
	Using wine tourism as profitable business unit*	59	52	49	49	45
	Using new technology in the production process*	43	52	51	47	60
	Integrating ecological practices in the supply chain	45	45	44	53	48
	Developing ecological products or services	37	36	34	33	33
	Earning / loss calculation on a regular base	14	15	13	12	14
Social	Other measures	6	7	2	2	4
	Dealing openly and honestly with employees	44	52	45	42	43
	Collaborating with regional companies/actors*	45	37	33	35	42
	Respecting labour protection law, human rights	33	39	42	36	42
	Monitoring the satisfaction of visitors	35	31	35	39	34
	Focusing on regional tourism	30	28	35	25	31
	Hiring local residents	28	28	30	27	33
	Providing flexible working hours*	28	35	27	27	23
	Providing professional training for employees*	20	24	27	33	32
	Other measures	4	6	1	4	3

- In the table the smallest (red) and largest (green) number is displayed according to each row.
- In terms of size, the measure earning / loss calculation on a regular basis contributes the least, with about 15% of respondents choosing it.

Measures contributing to sust. WT by certification

(Only with WT activities; N=1,232; in %)

%		Organic	Sustainable	Other certification	No certification
Environmental	Supporting biodiversity*	53	47	43	37
	Using regional products*	35	44	40	50
	Using energy carefully (water, electricity, fuel)*	30	45	45	46
	Organic production methods	71	21	23	17
	Separating waste and reducing waste*	24	41	29	37
	Using recyclable resources	28	30	42	36
	Using green energy	24	33	25	29
	Keeping the CO ₂ footprint small	23	27	23	25
Other measures	44	57	56	50	
Economic	Developing a long-term strategy for the company	52	58	57	54
	Using wine tourism as profitable business unit	50	54	44	56
	Using new technology in the production process	44	57	56	50
	Integrating ecological practices in the supply chain*	53	48	43	38
	Developing ecological products or services*	48	28	31	27
	Earning / loss calculation on a regular base	12	15	15	16
	Other measures	4	6	4	6
Social	Dealing openly and honestly with employees	50	43	47	41
	Collaborating with regional companies/actors	37	45	32	43
	Respecting labour protection law, human rights	38	42	40	33
	Monitoring the satisfaction of visitors	35	31	37	33
	Focusing on regional tourism	28	34	31	32
	Hiring local residents	28	31	26	31
	Providing flexible working hours	28	26	23	33
	Providing professional training for employees	29	25	26	21
	Other measures	3	5	6	3

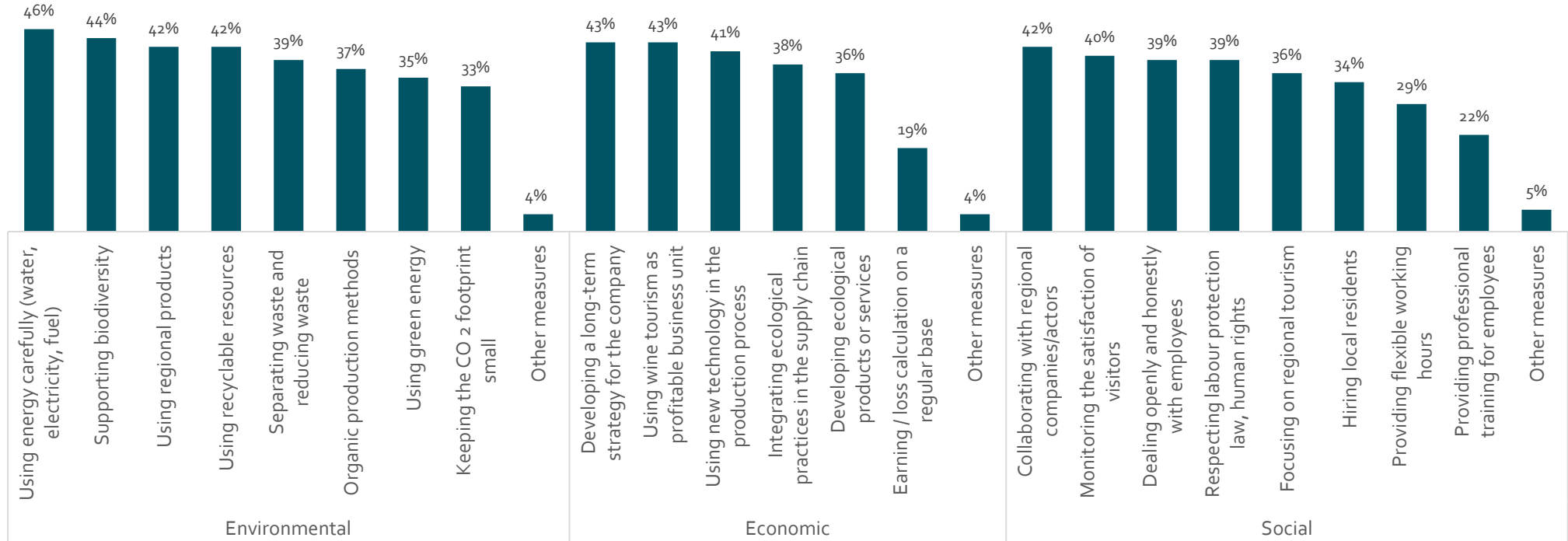
- In the table the smallest (red) and largest (green) number is displayed according to each row.
- Compared to the previous tables, there is no significant difference here related to certification.

Chapter 3.9

MEASURES PLANNED FOR SUSTAINABLE WINE TOURISM

Measures planned for sust. WT

(Only with WT activities; N=1,232; in %)



- Among the measures that the wineries plan to implement in the future for sustainable wine tourism, a total of 9 of the 25 measures are above 40%.
- In the environmental pillar, "Using energy carefully" (46%) is the most planned measure and "Organic production methods" (37%) the least.
- In the economic pillar, "Using new technology to make the production process more sustainable" (41%) is the most planned measure and "Earning / loss calculation on a regular base" (19%) the least.
- In the social pillar, "Dealing honestly and openly with employees" (39%) is the most planned measure and "Hiring local residents" (34%) the least.

Measures planned for sust. WT by country

(Only with WT activities; N=1,232; in %)

%		Italy	France	Spain	Portugal	Germany	Austria	Hungary	Australia	South Africa	USA	Chile	Other Countries
Environmental	Using energy carefully (water, electricity, fuel) *	47	37	44	47	46	35	40	62	62	76	46	46
	Supporting biodiversity*	46	42	28	36	44	39	36	57	49	67	57	45
	Using regional products*	43	34	31	32	44	39	39	54	35	70	51	51
	Using recyclable resources	49	32	42	47	37	27	28	62	38	67	43	44
	Separating waste and reducing waste*	44	29	29	38	36	28	31	59	49	70	37	42
	Organic production methods*	43	36	39	34	27	25	31	38	32	58	37	44
	Using green energy*	43	21	36	28	31	29	30	59	43	52	60	33
	Keeping the CO ₂ footprint small*	32	25	26	30	37	35	16	51	43	64	40	34
	Other measures	5	4	4	6	4	2	1	13	3	3	3	6
Economic	Developing a long-term strategy for the company*	43	38	37	38	37	38	34	68	59	70	40	51
	Using wine tourism as profitable business unit*	43	34	44	43	41	28	48	59	65	70	51	48
	Using new technology in the production process*	47	30	42	40	36	34	39	59	43	64	46	43
	Integrating ecological practices in the supply chain*	42	37	42	38	32	26	21	62	38	55	49	42
	Developing ecological products or services*	43	32	46	34	29	25	30	35	22	30	34	43
	Earning / loss calculation on a regular base*	18	12	15	28	19	10	18	41	43	39	9	24
	Other measures	5	3	2	2	4	2	3	10	8	3	0	5
Social	Collaborating with regional companies/ actors*	42	38	43	45	37	30	42	60	35	67	51	50
	Monitoring the satisfaction of visitors*	48	36	39	36	29	25	30	52	38	64	46	51
	Dealing openly and honestly with employees*	39	30	35	32	41	34	22	62	51	67	51	41
	Respecting labour protection law, human rights*	28	24	24	23	25	26	27	56	19	64	46	32
	Focusing on regional tourism	32	30	33	40	31	26	39	62	41	64	37	46
	Hiring local residents*	30	29	30	43	24	19	40	59	59	67	60	42
	Providing flexible working hours*	42	30	31	38	36	28	33	57	57	64	66	38
	Providing professional training for employees*	22	20	24	23	23	20	19	24	21	23	22	20
	Other measures	4	3	3	2	6	2	1	10	5	12	9	4

- In the table the smallest (red) and largest (green) number is displayed according to each row.
- The measure Using energy carefully (water, electricity, fuel) varies widely from country to country, reaching 35% in Austria and 76% in the USA.

Measures planned for sust. WT by size

(Only with WT activities; N=1,232; in %)

%		up to 10 ha	11-20 ha	21-40 ha	41-60 ha	61 + ha
Environmental	Using energy carefully (water, electricity, fuel)	40	48	47	54	49
	Supporting biodiversity	44	44	45	48	43
	Using regional products	42	40	43	43	47
	Using recyclable resources	37	38	47	43	51
	Separating waste and reducing waste	35	37	41	44	44
	Organic production methods	36	36	44	35	33
	Using green energy	34	35	36	43	37
	Keeping the CO ₂ footprint small	31	33	33	36	39
	Other measures	3	5	2	5	8
Economic	Developing a long-term strategy for the company*	36	42	48	53	48
	Using wine tourism as profitable business unit	41	42	47	51	45
	Using new technology in the production process*	37	40	38	56	52
	Integrating ecological practices in the supply chain	34	40	39	42	44
	Developing ecological products or services	34	33	39	42	41
	Earning / loss calculation on a regular base	18	17	16	31	24
	Other measures	4	5	2	5	5
Social	Collaborating with regional companies/ actors	39	44	42	38	50
	Monitoring the satisfaction of visitors	36	38	42	48	47
	Dealing openly and honestly with employees	34	43	40	41	44
	Respecting labour protection law, human rights*	31	42	40	49	46
	Focusing on regional tourism	35	34	39	35	37
	Hiring local residents	31	32	30	41	40
	Providing flexible working hours	26	29	32	32	30
	Providing professional training for employees	20	22	20	24	24
	Other measures	5	5	2	6	6

- In the table the smallest (red) and largest (green) number is displayed according to each row.
- As can be seen from the table, the measures which are planned for sustainable wine tourism are relatively similar independent of company size.

Measures planned for sust. WT by certification

(Only with WT activities; N=1,232; in %)

%		Organic	Sustainable	Other certification	No certification
Environmental	Using energy carefully (water, electricity, fuel)	56	62	53	62
	Supporting biodiversity	59	59	48	55
	Using regional products	50	61	51	55
	Using recyclable resources	53	55	52	53
	Separating waste and reducing waste	48	54	43	51
	Organic production methods*	70	33	30	36
	Using green energy	46	46	41	46
	Keeping the CO ₂ footprint small	42	49	37	42
Other measures	3	8	7	5	
Economic	Developing a long-term strategy for the company	51	62	56	54
	Using wine tourism as profitable business unit	55	57	46	59
	Using new technology in the production process*	46	64	54	53
	Integrating ecological practices in the supply chain	55	49	50	42
	Developing ecological products or services*	56	42	43	39
	Earning / loss calculation on a regular base	23	27	21	26
	Other measures	4	6	6	6
Social	Collaborating with regional companies/ actors	54	58	55	52
	Monitoring the satisfaction of visitors	54	52	54	47
	Dealing openly and honestly with employees	48	56	43	52
	Respecting labour protection law, human rights	48	54	47	49
	Focusing on regional tourism	45	49	45	45
	Hiring local residents	42	48	35	44
	Providing flexible working hours	37	38	27	40
	Providing professional training for employees	24	23	23	20
	Other measures	5	6	7	6

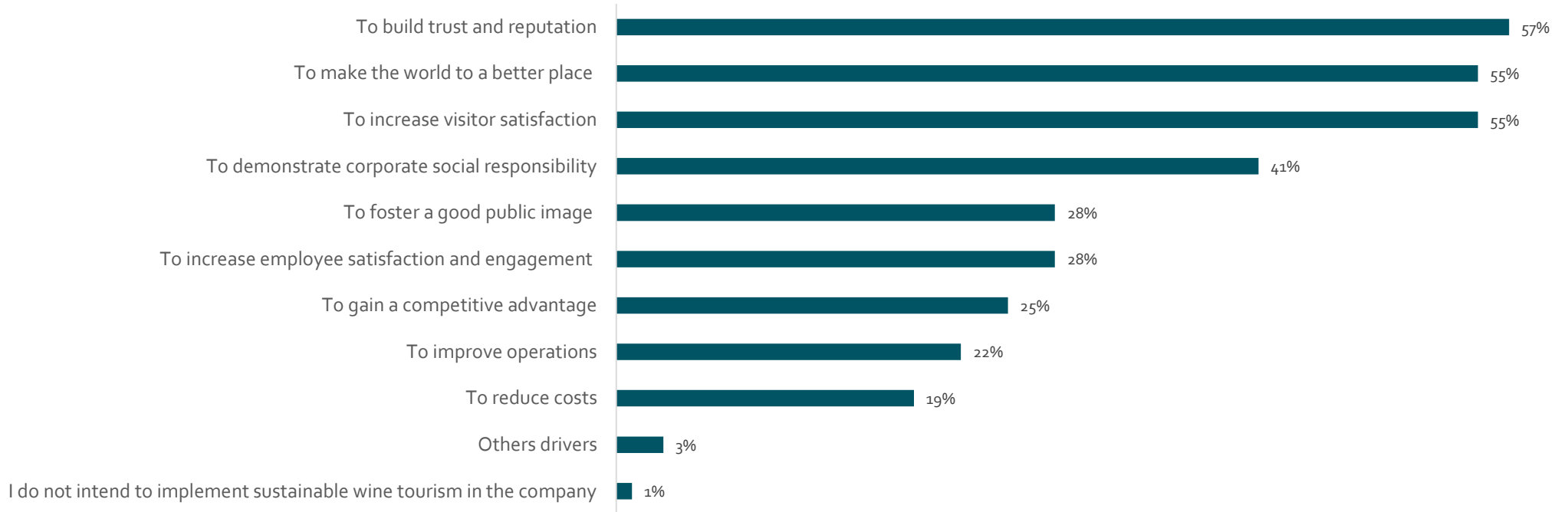
- In the table the smallest (red) and largest (green) number is displayed according to each row.
- Compared to the previous tables, there is no significant difference here related to certification.

Chapter 3.10

MAIN DRIVERS FOR SUSTAINABLE WINE TOURISM

Drivers for sust. WT

(Only with WT activities; N=1,232; in %)



- The main drivers for sustainable wine tourism are “to build trust and reputation” (57%), “to increase visitor satisfaction” (55%) and “to make the world to a better place” (55%).
- Reducing costs appears to be the least important driver at 19%.

Drivers for sust. WT by country

(Only with WT activities; N=1,232; in %)

%	Italy	France	Spain	Portugal	Germany	Austria	Hungary	Australia	South Africa	USA	Chile	Other Countries
To build trust and reputation*	49	66	52	61	57	54	64	72	61	67	43	63
To increase visitor satisfaction	58	56	62	53	45	48	52	61	48	53	47	60
To make the world to a better place*	52	52	58	64	50	63	34	78	61	67	70	56
To demonstrate corporate social responsibility*	33	34	47	47	45	48	32	67	65	50	50	39
To increase employee satisfaction and engagement*	21	24	28	31	29	27	24	54	35	33	33	32
To foster a good public image	24	31	30	28	29	22	30	37	26	27	20	32
To gain a competitive advantage*	21	23	38	25	21	22	20	26	26	23	30	37
To improve operations*	13	20	18	31	20	18	24	52	42	47	23	27
To reduce costs*	16	10	23	31	16	21	28	22	26	40	17	19
Others drivers	3	3	5	0	3	1	4	7	3	3	3	3
No sustainable wine tourism in the winery	1	1	3	0	1	1	0	0	3	0	3	0

- In the table the smallest (red) and largest (green) number is displayed according to each row.
- Among the main drivers, the biggest difference is seen in the category “to increase employee satisfaction and engagement”. Here, Italy achieves a value of 21%, whereas Austria has a value of 54%.

Drivers for sust. WT by size

(Only with WT activities; N=1,232; in %)

%	up to 10 ha	11-20 ha	21-40 ha	41-60 ha	61 + ha
To build trust and reputation	53	60	59	57	60
To increase visitor satisfaction	50	56	52	56	61
To make the world to a better place	56	53	57	56	56
To demonstrate corporate social responsibility*	33	40	43	44	55
To increase employee satisfaction and engagement*	20	26	31	34	38
To foster a good public image*	27	22	30	33	33
To gain a competitive advantage	22	23	28	26	31
To improve operations*	16	23	24	23	31
To reduce costs	18	18	18	21	21
Others drivers	4	4	2	3	4
No sustainable wine tourism in the winery	2	1	0	2	0

- In the table the smallest (red) and largest (green) number is displayed according to each row
- Across the different size categories, the drivers for sustainable wine tourism are pretty similar.

Drivers for sust. WT by certification

(Only with WT activities; N=1,232; in %)

%	Organic	Sustainable	Other certification	No certification
To build trust and reputation	57	59	54	56
To increase visitor satisfaction	56	57	49	53
To make the world to a better place*	60	59	45	51
To demonstrate corporate social responsibility*	40	49	41	38
To increase employee satisfaction and engagement	26	28	31	28
To foster a good public image	29	30	27	25
To gain a competitive advantage	26	26	27	23
To improve operations*	18	26	22	23
To reduce costs*	16	17	17	23
Others drivers	3	2	4	4
No sustainable wine tourism in the winery	1	0	1	2

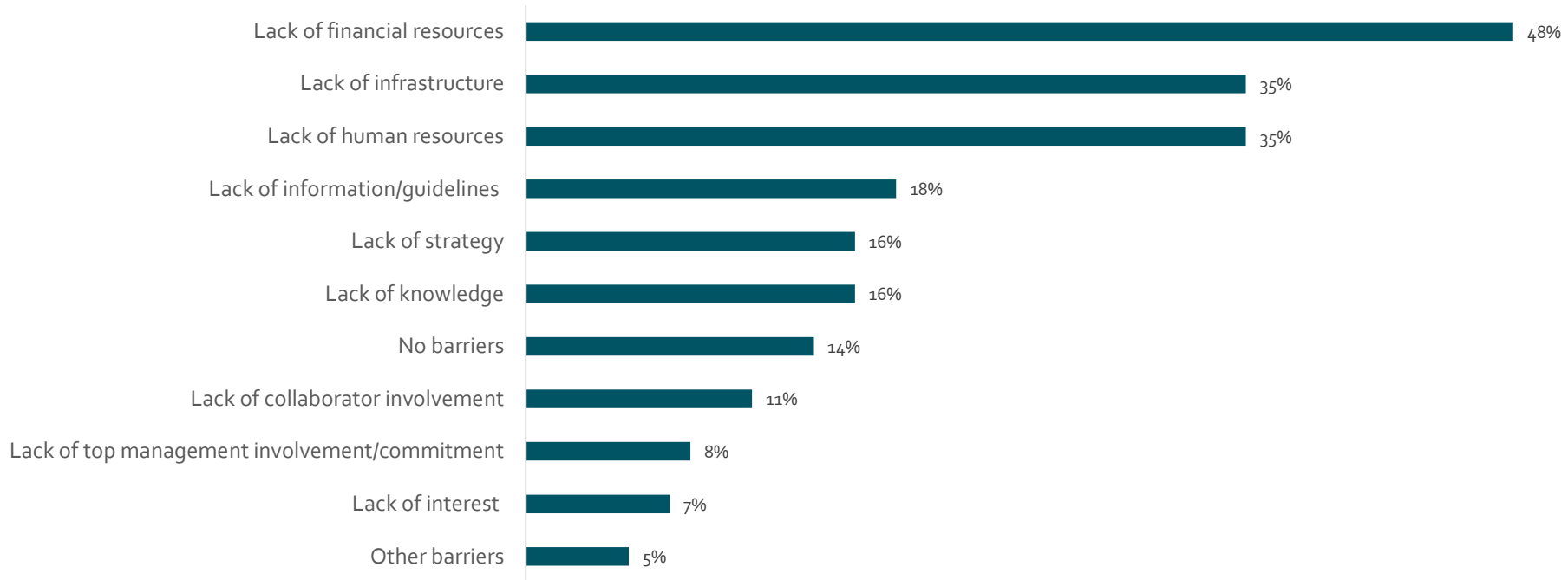
- In the table the smallest (red) and largest (green) number is displayed according to each row.

Chapter 3.11

MAIN BARRIERS FOR SUSTAINABLE WINE TOURISM

Barriers for sust. WT

(Only with WT activities; N=1,232; in %)



- The main barriers for sustainable wine tourism are "lack of financial resources" (48%), "lack of human resources" (35%) and "lack of infrastructure" (35%).
- The least important barrier appears to be "lack of interest" at 7%.

Barriers for sust. WT by country

(Only with WT activities; N=1,232; in %)

%	Italy	France	Spain	Portugal	Germany	Austria	Hungary	Australia	South Africa	USA	Chile	Other Countries
Lack of financial resources*	47	49	47	53	40	48	38	57	42	57	80	50
Lack of human resources*	24	43	30	33	46	49	32	39	19	40	30	35
Lack of infrastructure	41	30	37	28	30	37	42	28	32	17	40	34
Lack of information/guidelines*	21	10	16	28	14	7	22	31	10	13	23	21
Lack of knowledge	18	15	15	14	14	12	22	22	23	13	17	16
Lack of strategy	16	14	16	25	12	16	26	11	19	17	20	15
Lack of collaborator involvement	12	10	9	17	8	9	8	11	23	10	27	12
Lack of top management involvement	7	10	10	14	7	1	4	13	13	3	13	7
Lack of interest	8	7	5	6	6	6	8	0	10	0	10	8
Other barriers	5	1	6	8	6	3	4	6	6	7	13	7
No barriers	10	16	23	6	15	13	10	9	19	20	7	16

- In the table the smallest (red) and largest (green) number is displayed according to each row.
- Among the main barriers, the biggest difference is seen in the category "lack of financial resources". Here, Chile achieves a value of 80%, whereas Hungary has a value of 38%.

Barriers for sust. WT by size

(Only with WT activities; N=1,232; in %)

%	up to 10 ha	11-20 ha	21-40 ha	41-60 ha	61 + ha
Lack of financial resources	48	52	49	45	42
Lack of human resources	34	39	37	24	36
Lack of infrastructure	30	40	36	34	34
Lack of information/guidelines	17	16	21	22	19
Lack of knowledge	16	15	17	11	19
Lack of strategy	13	18	14	21	18
Lack of collaborator involvement	11	9	11	16	13
Lack of top management involvement	6	6	11	8	10
Lack of interest	8	5	7	5	8
Other barriers	5	6	5	2	8
No barriers	13	11	11	22	15

- In the table the smallest (red) and largest (green) number is displayed according to each row
- Across the different size categories, the barriers for sustainable wine tourism are pretty similar.

Barriers for sust. WT by certification

(Only with WT activities; N=1,232; in %)

%	Organic	Sustainable	Other certification	No certification
Lack of financial resources	47	49	46	48
Lack of human resources	33	34	32	39
Lack of infrastructure	35	35	33	36
Lack of information/guidelines	20	15	17	18
Lack of knowledge	14	18	17	17
Lack of strategy	15	18	16	15
Lack of collaborator involvement	12	10	15	10
Lack of top management involvement	9	8	7	7
Lack of interest	7	7	7	6
Other barriers	3	7	9	6
No barriers	15	15	11	12

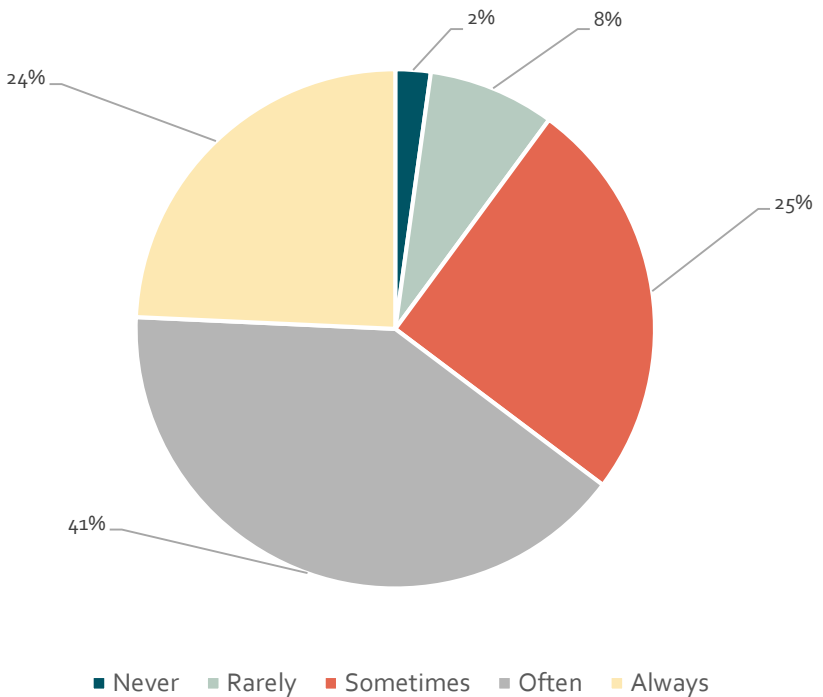
- In the table the smallest (red) and largest (green) number is displayed according to each row.
- Compared to the previous tables, there is no significant difference here related to certification.

Chapter 3.12

SUSTAINABILITY AS PART OF THE COMMUNICATION

Sustainability in communication

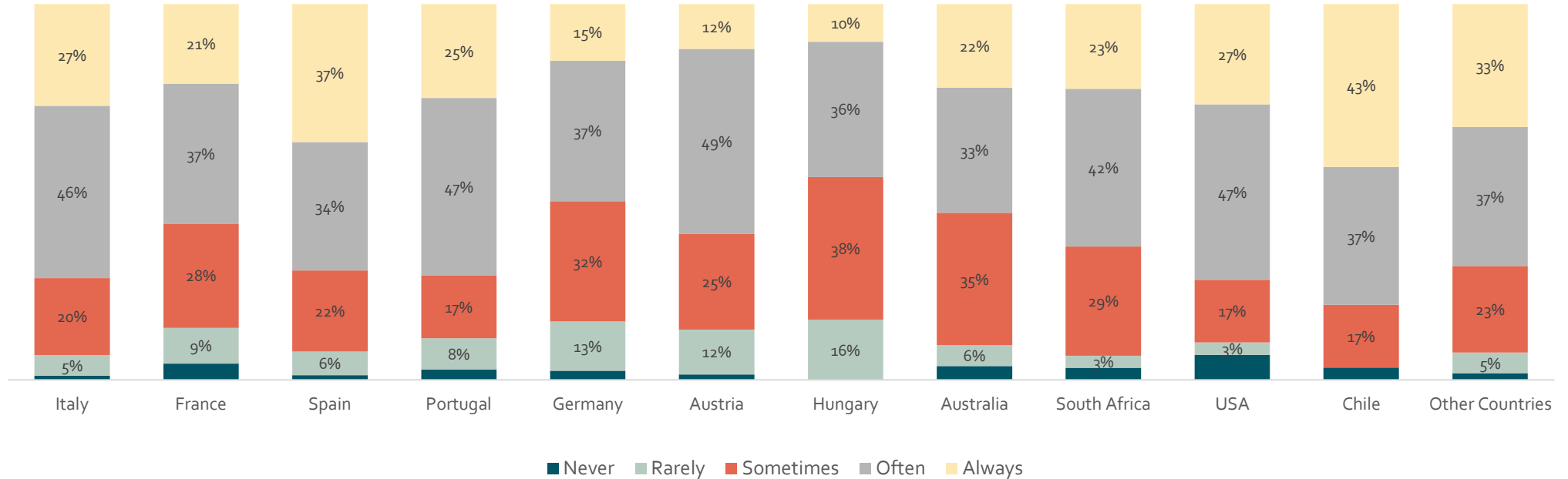
(Only with WT activities; N=1,232; in %)



- 65% of the wineries stated that they “often” or “always” use sustainability in communication.

Sustainability in communication by country

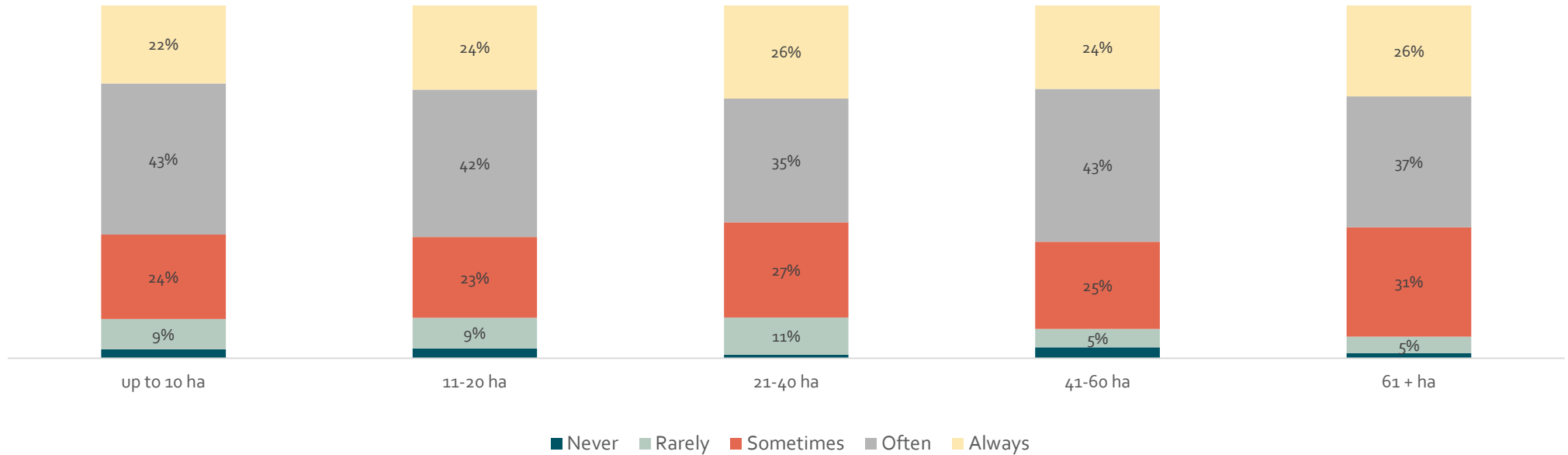
(Only with WT activities; N=1,232; in %)



- The highest percentages of wineries who always include sustainability in their communication about wine tourism can be found in Chile (43%) and Spain (37%).
- The lowest percentage in this regard can be found in Hungary (10%), Austria (12%) and Germany (15%)
- In the majority of countries, "often" is the most frequently given answer.

Sustainability in communication by size

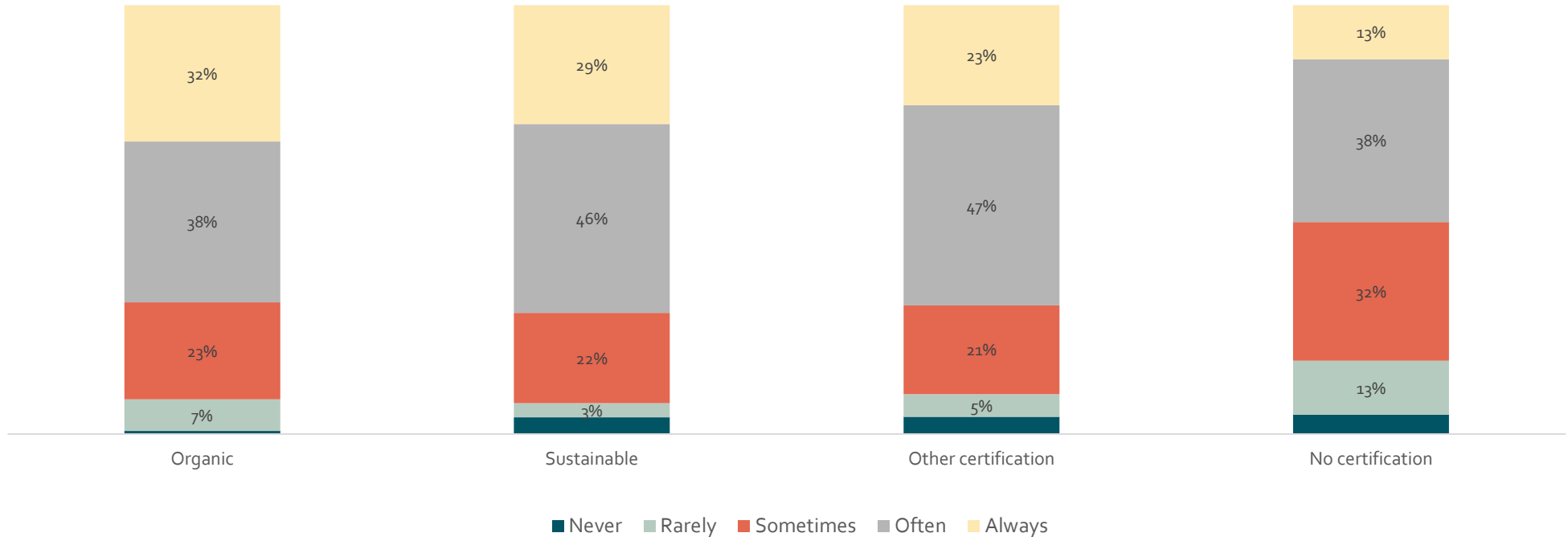
(Only with WT activities; N=1,232; in %)



- No significant differences could be found in differentiating wineries by company size.
- Regardless of the size of the winery, most of the wineries stated that they often use sustainability in their communication about wine tourism.

Sustainability in communication by certification

(Only with WT activities; N=1,232; in %)



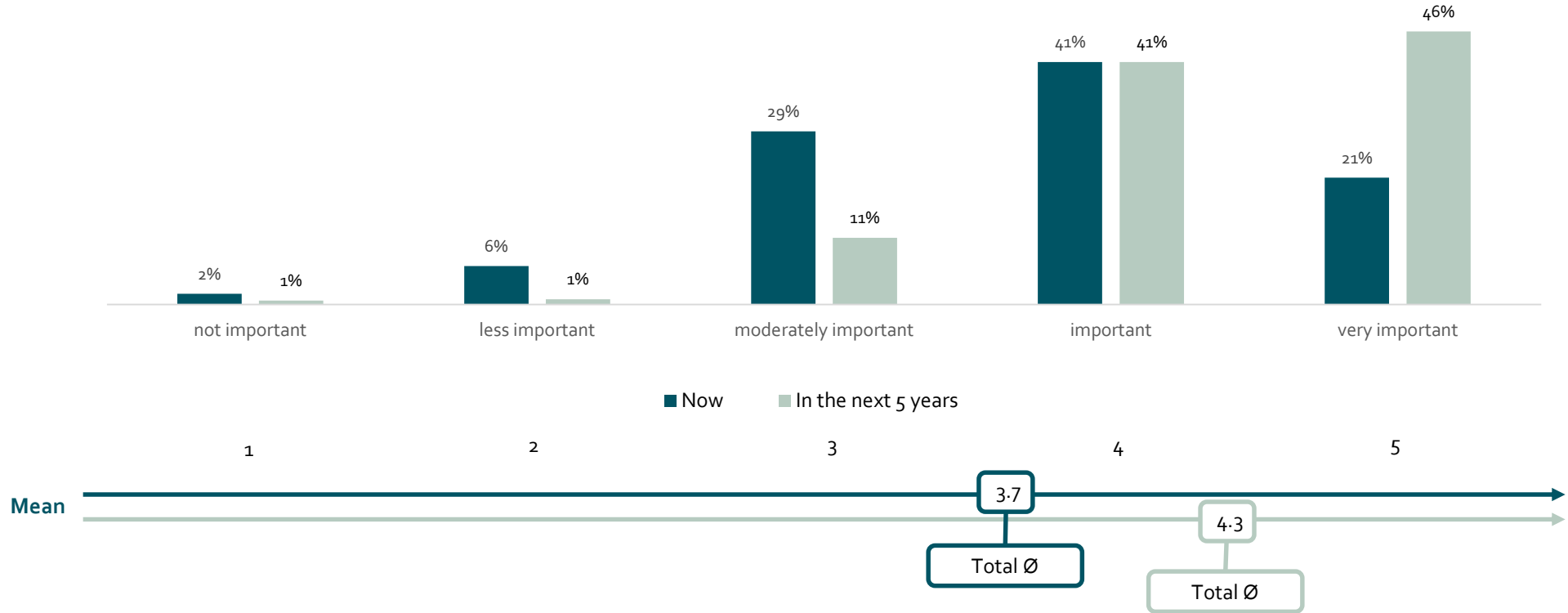
- Regardless of whether the wineries are certified or not, they indicated that they “always” (Average percent: 24,3%) or “often” (Average percent: 40,5%) communicate sustainability.

Chapter 3.13

VISITOR PERCEPTION OF SUSTAINABLE WINE TOURISM PRACTICES

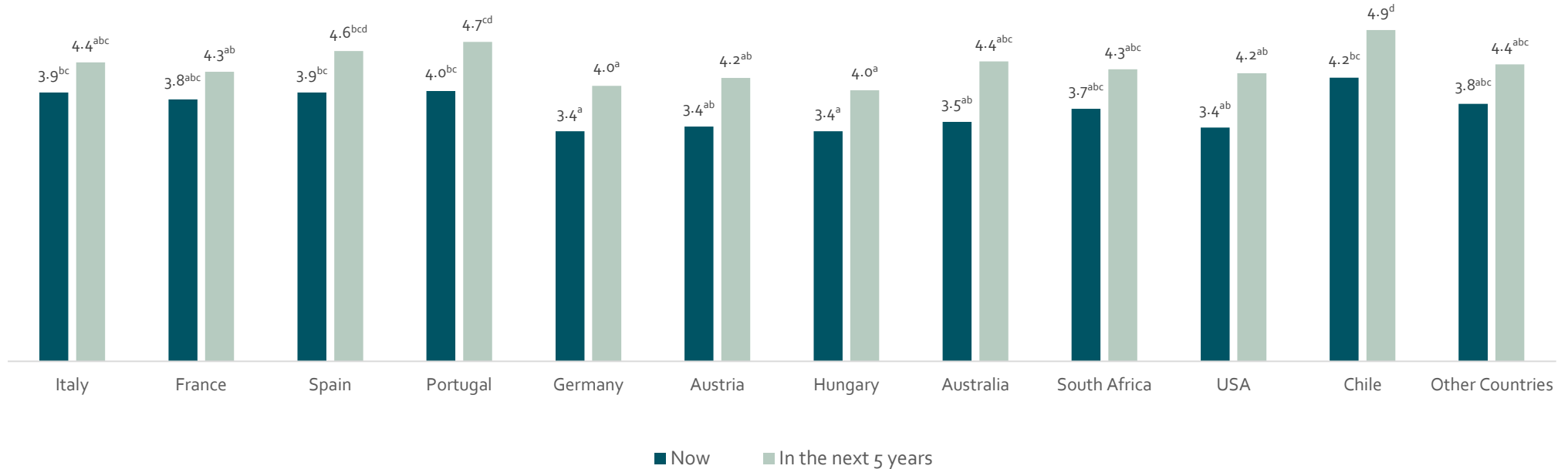
Visitor perception of sustainable wine tourism practices

(Only with WT activities; N=1,232; in %)



- 62% of the wineries surveyed said that for visitors of their winery sustainable wine tourism now is important or very important.
- For the next five years, the wineries indicated that sustainable wine tourism is important (41%) or very important (46%) for the visitors of their wineries. That makes a total of 87%.

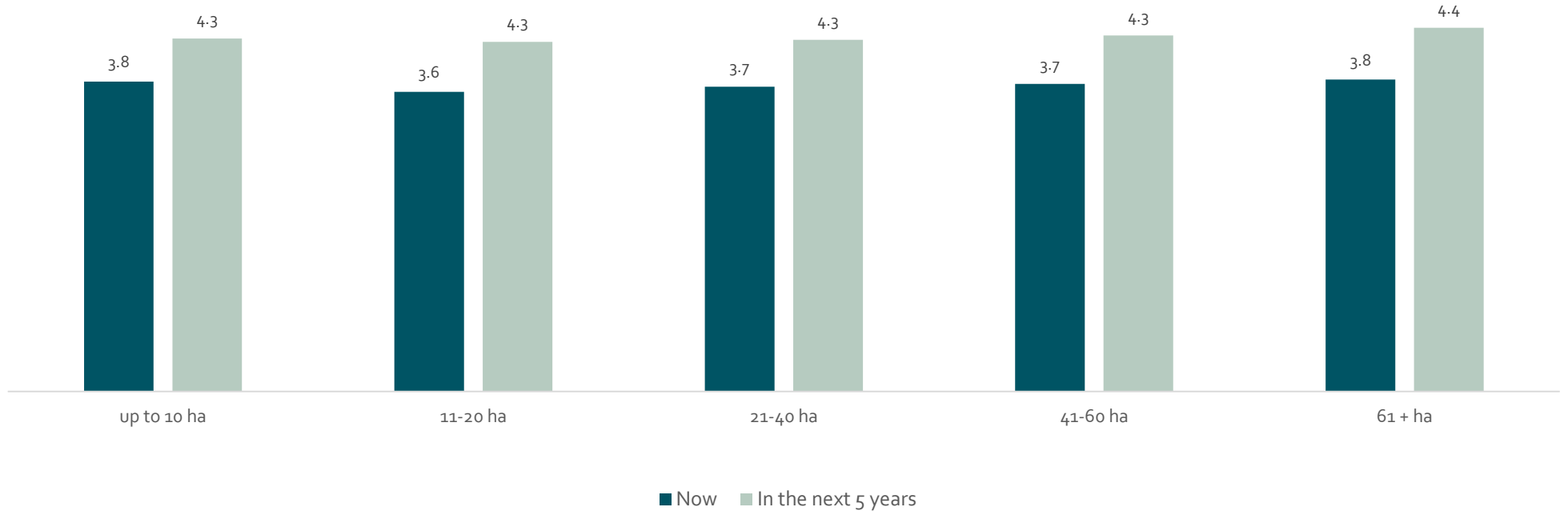
Visitor perception of sustainable wine tourism practices by country (Only with WT activities; N=1,232; mean on a 5-point scale)



- In terms of countries, wineries feel that for visitors of their wineries sustainable wine tourism is already very important today. But in the next five years sustainable wine tourism will even become more important.
- On a 5-point scale, the average reached 3.7 for “now” (dark green) and for “in the next 5 years” the average reached 4.3 (light green).

Visitor perception of sustainable wine tourism practices

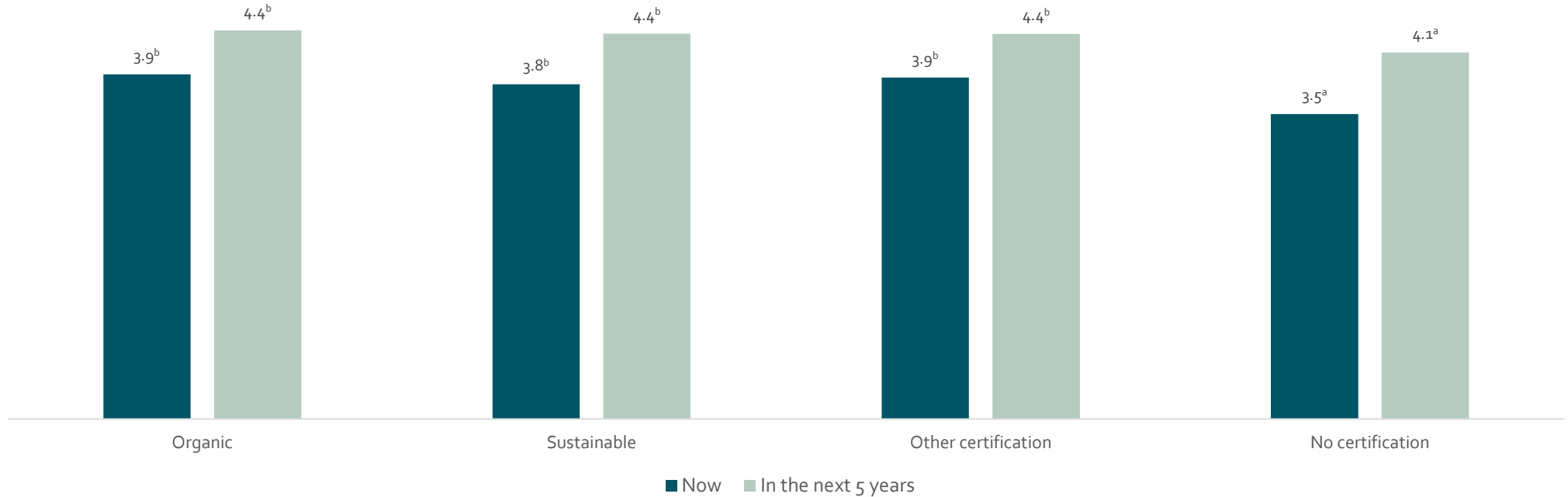
(Only with WT activities; N=1,232; in %)



- No significant differences.
- Today, over 20% of wineries assess the visitors' perception of sustainability as very important.
- In five years, over 40% of wineries estimate that the visitors' perception of sustainability will be very important.

Visitor perception of sustainable wine tourism practices

(Only with WT activities; N=1,232; mean on a 5-point scale)



- Here we also see, regardless of whether the winery is certified or not, that sustainable wine tourism is increasing.
- On a 5-point scale, the average reached 4.3 (light green) for “in the next 5 years” and for “now” the average reached 3.7 (dark green).

Chapter 4

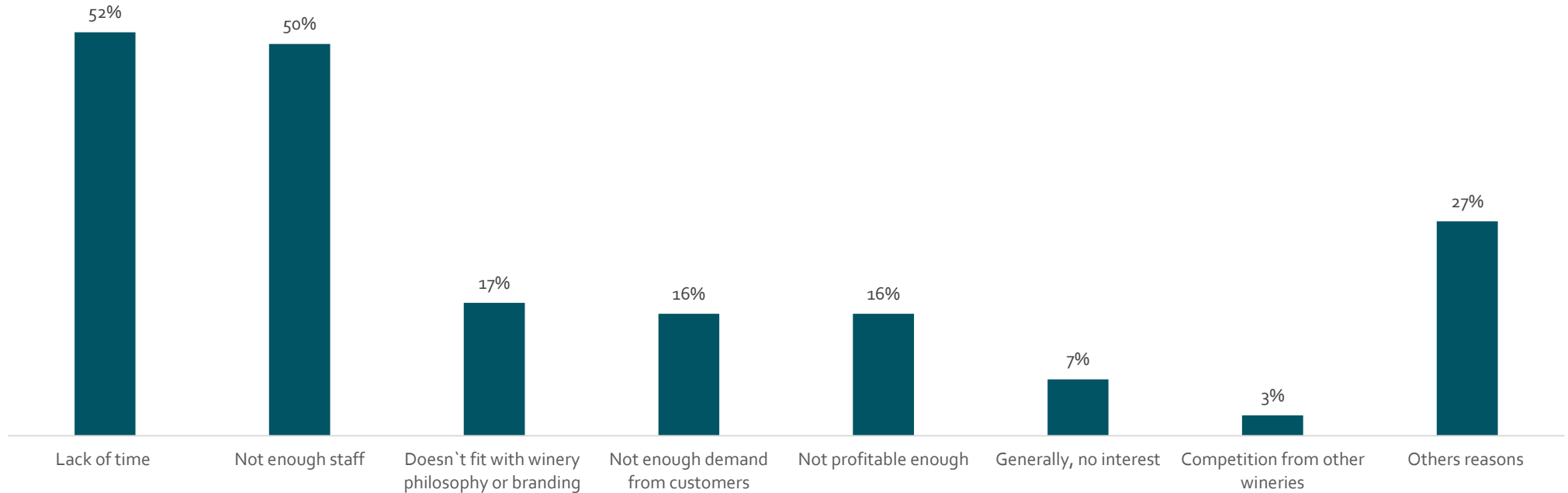
WINERIES WITHOUT WINE TOURISM ACTIVITIES

Chapter 4.1

REASONS AGAINST INVOLVEMENT

Reasons against involvement

(Only without WT activities; N=347; in %)



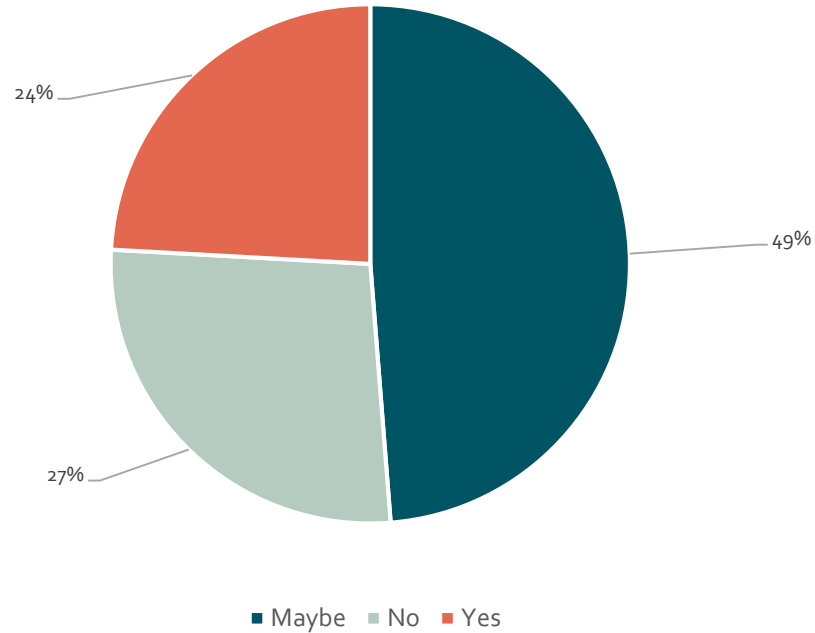
- 22% of the participants in the survey stated that they did not offer any wine tourism activities.
- The most important reasons why they do not offer wine tourism activities are a lack of time (52%), not enough staff (50%) and not fitting in with the company philosophy (17%).

Chapter 4.2

POSSIBLE FUTURE WINE TOURISM ACTIVITIES

Possible future wine tourism activities

(Only without WT activities; N=347; in %)



- About a quarter of the wineries (24%) that do not participate in wine tourism state that they consider offering wine tourism activities in the future. Another 49% answered this question with maybe.
- The remaining 27% of the farms do not consider wine tourism activities.

Chapter 5

SUMMARY

1. Sustainability plays a critical role for the wineries.
2. The winegrowers see room for improvement regarding the sustainability of their wine tourism offers.
3. Wineries evaluate the overlap between sustainable wine production and sustainable wine tourism very heterogeneously – but the overall overlap appears to be relatively small.
4. For the wineries, the environmental dimension of sustainability is slightly more important than the economic and social aspects.
5. *Supporting biodiversity* (environmental), *developing a long-term strategy for the company* (economic) and *dealing openly and honestly with employees* (social) are the most effective contributions to sustainable wine tourism.
6. Among the measures that wineries plan to implement, *using energy carefully*, *developing a long-term strategy for the company* and *collaborating with regional companies/actors* are the most important.
7. The main drivers for the wineries implementing sustainable wine tourism in their company are related to consumers (increasing reputation and satisfaction) and personal idealism.
8. The main barriers to not implementing sustainable wine tourism in wineries are the lack of financial resources, human capital, infrastructure, and information.
9. Sustainable practices are often part of the communication about wine tourism.
10. Recently, 62% of the wineries stated that sustainable practices in wine tourism are essential for visitors; however, 87 % of wineries say it will become significantly more important in 5 years.

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Quotation:

Szolnoki, G., Ridoff, N., Nilsson, C., Tafel, M. and Stelter, A.-C. (2022), Sustainable Wine Tourism – A Global Survey. Geisenheim University and WineTourism.com. Online available: <https://www.winetourism.com/sustainable-wine-tourism/>