SUSTAINABLE WINE TOURISM

A GLOBAL SURVEY

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Description of the sample (n=1,579)

Quantitative study
Survey method: Online survey
Data collection: November 2021
Dataset: 1,579 wineries from 42 countries
Aim: To quantify and to verify wineries’ perceptions and attitudes to sustainability in wine tourism

Top responding countries

South-West Europe
- Italy
- Spain

West-Central Europe
- Germany
- France

New World
- USA
- New Zealand
Survey topics addressed

- Relevance of sustainability in wine tourism
- The three-pillar model of sustainable wine tourism
- Measures contributing to sustainable wine tourism
- Drivers and barriers to sustainable wine tourism
- Communication and visitors’ perception
Relevance of sustainability in wine tourism

General importance of sustainability

- Less important
- Very important
- Moderately important

Perceived sustainability of the wine tourism operations

- **Yes** 35%
  - Wine tourism operation is fully sustainable
- **Partly** 63%
  - Wine tourism operation is partly sustainable
- **No** 2%
  - Wine tourism operation is not sustainable

General importance of sustainability:

- Less important: 2%
- Very important: 34%
- Moderately important: 59%
Relevance of sustainability in wine tourism

**Contribution** of wine tourism activities to the sustainable development of wineries

<table>
<thead>
<tr>
<th>Contribution</th>
<th>Mean</th>
</tr>
</thead>
<tbody>
<tr>
<td>Not significant</td>
<td>1</td>
</tr>
<tr>
<td>Less significant</td>
<td>2</td>
</tr>
<tr>
<td>Moderately significant</td>
<td>3</td>
</tr>
<tr>
<td>Significant</td>
<td>4</td>
</tr>
<tr>
<td>Very significant</td>
<td>5</td>
</tr>
</tbody>
</table>

**Overlap** of sustainable wine production and wine tourism

<table>
<thead>
<tr>
<th>Overlap</th>
<th>Mean</th>
</tr>
</thead>
<tbody>
<tr>
<td>No overlap at all</td>
<td>1</td>
</tr>
<tr>
<td>A slight overlap</td>
<td>2</td>
</tr>
<tr>
<td>Some overlap</td>
<td>3</td>
</tr>
<tr>
<td>Large overlap</td>
<td>4</td>
</tr>
<tr>
<td>Complete overlap</td>
<td>5</td>
</tr>
</tbody>
</table>

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Mean contribution of wine tourism activities to the sustainable development of wineries

Mean overlap of sustainable wine production and wine tourism
Importance of the three pillars with regards to sustainable wine tourism

- Environmental: 40%
- Economic: 31%
- Social: 29%

No significant differences by country, size of winery or certification
Most effective measures contributing to sustainable wine tourism

**Environmental**
- Supporting biodiversity: 46%
- Using regional products: 42%
- Using energy carefully: 40%
- Organic production methods: 38%
- Separating and reducing waste: 32%
- Using recyclable resources: 32%
- Using green energy: 27%
- Keeping the CO₂ footprint small: 25%
- Other measures: 25%

**Economic**
- Developing a long-term strategy: 54%
- Using wine tourism as profitable business: 52%
- Using new technology in the production: 50%
- Integrating ecological practices - supply chain: 46%
- Developing ecological products or services: 35%
- Earning / loss calculation regularly: 14%
- Other measures: 25%

**Social**
- Dealing openly and honestly with employees: 46%
- Collaborating with regional companies/actors: 40%
- Respecting labour protection law/human rights: 38%
- Monitoring the satisfaction of visitors: 34%
- Focusing on regional tourism: 31%
- Hiring local residents: 29%
- Providing flexible working hours: 28%
- Providing professional training for employees: 25%
- Other measures: 25%
Most effective vs. planned measures contributing to sustainable wine tourism
Drivers and barriers to sustainable wine tourism

Main drivers towards sustainable wine tourism

- To build trust and reputation
- To make the world a better place
- To increase visitor satisfaction
- To demonstrate corporate social responsibility

Main barriers to sustainable wine tourism

- Lack of financial resources
- Lack of infrastructure
- Lack of human resources
- Lack of information and guidelines
Communication and visitors’ perception

Communication of sustainability

- Never: 2%
- Rarely: 8%
- Sometimes: 25%
- Often: 41%
- Always: 24%

65%

Visitors’ perception of sustainable wine tourism practices

Recent situation
- Important: 62%
- Not important: 38%

In the next 5 years
- Important: 87%
- Not important: 13%
CONCLUSION
Sustainability and sustainable wine tourism are of great importance

Definition and measures of sustainable wine tourism
- lack of experience, direct answer complicated
  - Supported measure catalogue
    - concrete ideas, direct answer easier

One of the main barriers
- lack of information and guidelines

One of the reasons against sustainable wine tourism
- lack of information and guidelines

Guidelines and consultation service
According to “wine tourism’s contribution to sustainable development”—divided in three groups:

- **Conservative & low sustainable development**
  - Less significant \( \Phi 2.5 \mid 40\% \\n
- **Innovative & rapid sustainable development**
  - Very significant \( \Phi 5.0 \mid 24\% \\n
### Conclusion

#### Willingness to develop

- Importance of sustainability
- Sustainable tourism operation
- Wine tourism service

- Overlap between production and wine tourism in terms of sustainability
- Organic production
- Wine tourism as profitable business unit
- Monitoring visitors’ satisfaction

- Increase visitor satisfaction
- No barriers of sustainable wine tourism
- Communication
- Visitors’ perception of importance

- Communication
- Drivers & barriers
- Measure
- Overlap
- Importance
Complexity of sustainable wine tourism development

Conclusion

Individual level
Owner, manager, employees

Winery
Sustainable development

Production
Wine tourism

Regional level

Other wineries
Authorities
Visitors

Information, guideline, motivation, cooperation
Information, guideline, motivation, cooperation
Motivation

Cooperation

• Holiday ≠ Sacrificing pleasure
• 80% by car (CO₂ footprint)
• Negative influences:
  - over tourism
  - complaint
  - burden of infrastructure
  - parking etc.

Social

Economic

Environmental
Research team

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Quotation: