Global Wine Tourism Report 2025

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A study by Hochschule Geisenheim University, in collaboration with UN Tourism, the International Organisation of Vine and Wine (OIV), the Great Wine Capitals Global Network (GWC), and WineTourism.com

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Foreword & Methodology

Foreword

Wine tourism has experienced significant growth over the past decade, emerging as a profitable and dynamic branch of the global wine industry. As a driver of sustainable development, it plays a key role in diversifying rural economies, creating jobs, and bringing tangible benefits to local communities. It also supports the preservation of cultural and natural heritage, while promoting more responsible and inclusive tourism models.

However, despite its growing importance, both academics and industry professionals continue to face challenges due to a lack of reliable data and insights. A clear information gap remains in the field of wine tourism at the international level, limiting the capacity of policymakers and the industry to develop evidence-based public policies and business strategies.

To address this need, Hochschule Geisenheim University — in collaboration with UN Tourism, the International Organisation of Vine and Wine (OIV), the Great Wine Capitals Global Network (GWC) and WineTourism.com — has launched a global research initiative. This initiative culminates in a Global Wine Tourism Report, based on an annual worldwide survey designed to generate up-to-date data and insights on key developments.

Methodology

Data collection took place in May and June 2025 using an online questionnaire distributed by the project partners. In total, 1,310 wineries from 47 countries participated in the survey. For data analysis, descriptive statistics such as frequencies and arithmetic means were used. The mean values are rounded to one decimal place and percentages are shown without decimal places. To compare subgroups by origin or winery size, ANOVA (Tukey-B test) and cross-tabulations (Chi-square test) were applied. To avoid statistical bias in the analyses and to offer representative findings, the data were weighted and evaluated based on the available vineyard area in each country, according to OIV statistics from 2025. From page 8 onward, the results based on the weighted data are presented.

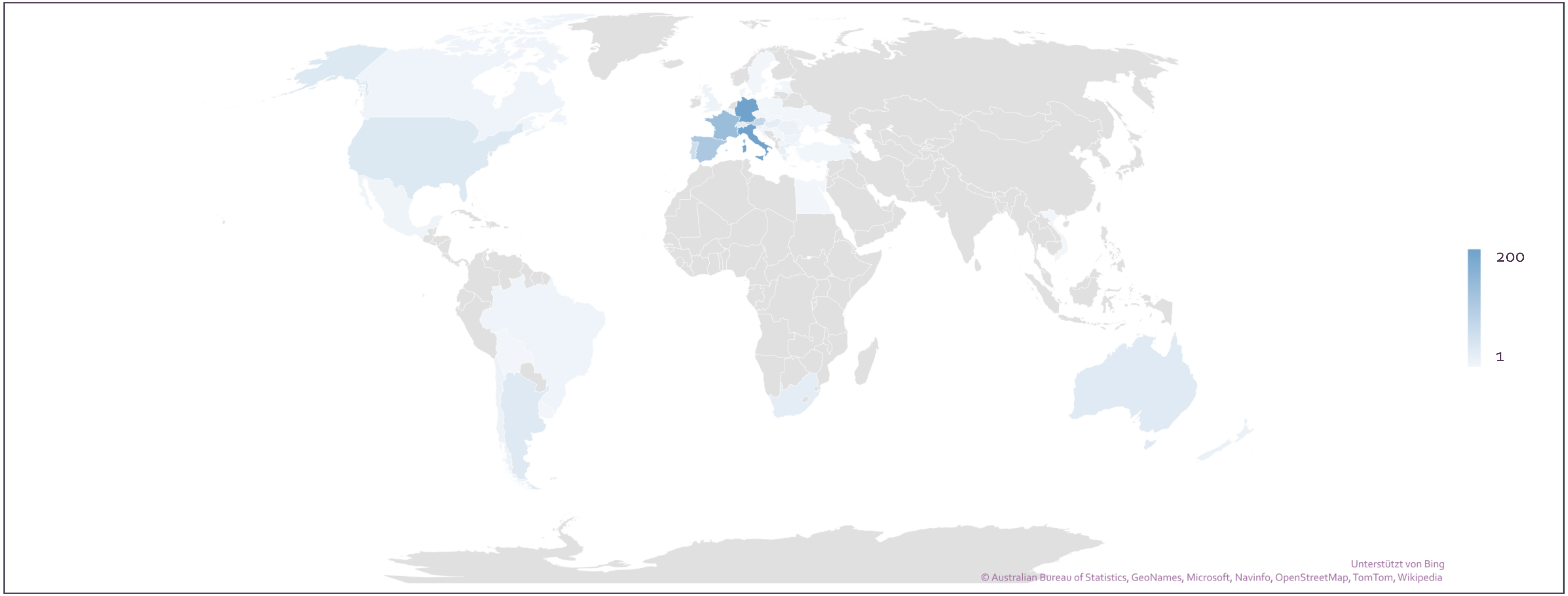
Chapter 2

Description of the sample

Chapter 2.1
Origin and winery size

Global share of participating wineries

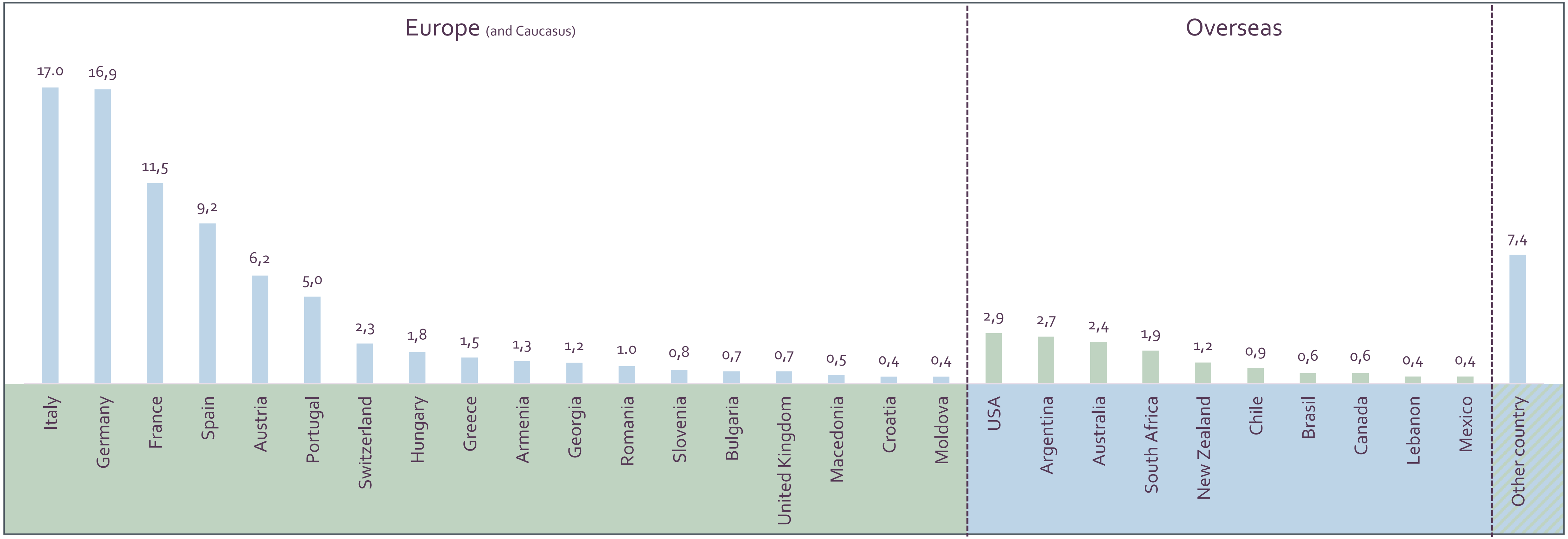
(All wineries; N=1,310; no weighting; in %)



- In total, 1,310 wineries from 47 countries across Europe, the Americas, Oceania, and Africa contributed to the dataset.
- The number of respondents and their heterogeneity from across the world allow us to present a reliable report on the current situation, as well as on innovations and trends among wineries offering wine tourism activities.

Global share of participating wineries

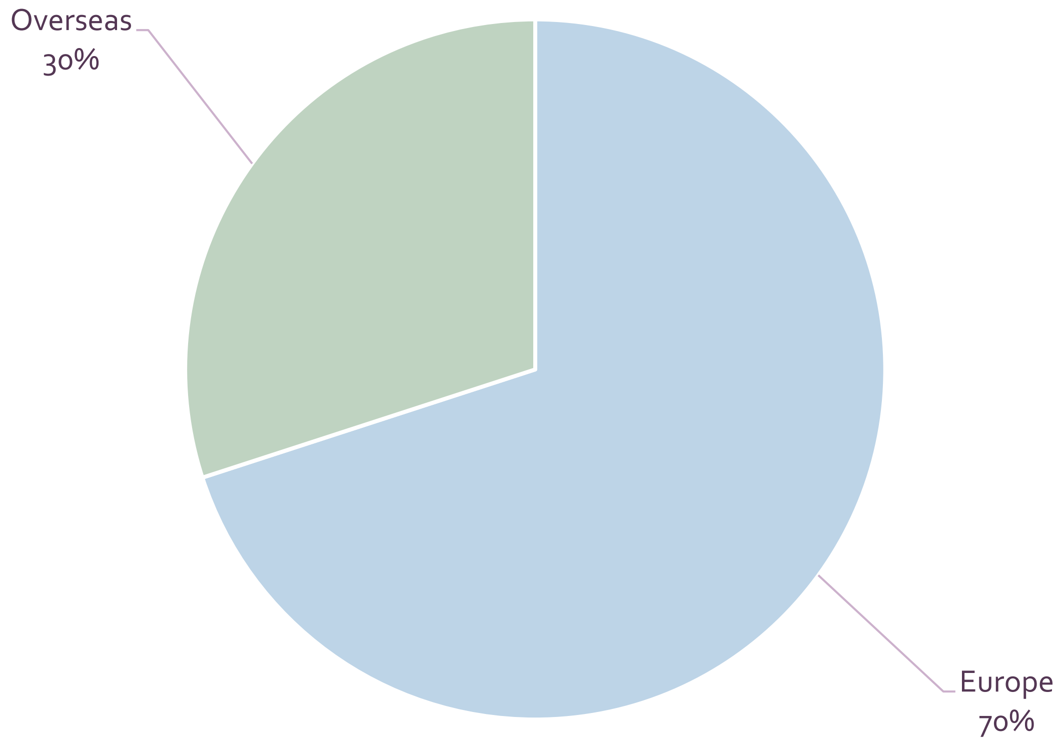
(All wineries; N=1,310; no weighting; in %)



- Most of the participating wineries are from Europe and the Caucasus region with the highest shares coming from Italy (17.0%), Germany (16.9%), France (11.5%) and Spain (9.2%).
- Most of the wineries from overseas countries are from the USA (2.9%), followed by Argentina (2.7%) , Australia (2.4%) and South Africa (1.9%).

Share of participating wineries from overseas and Europe

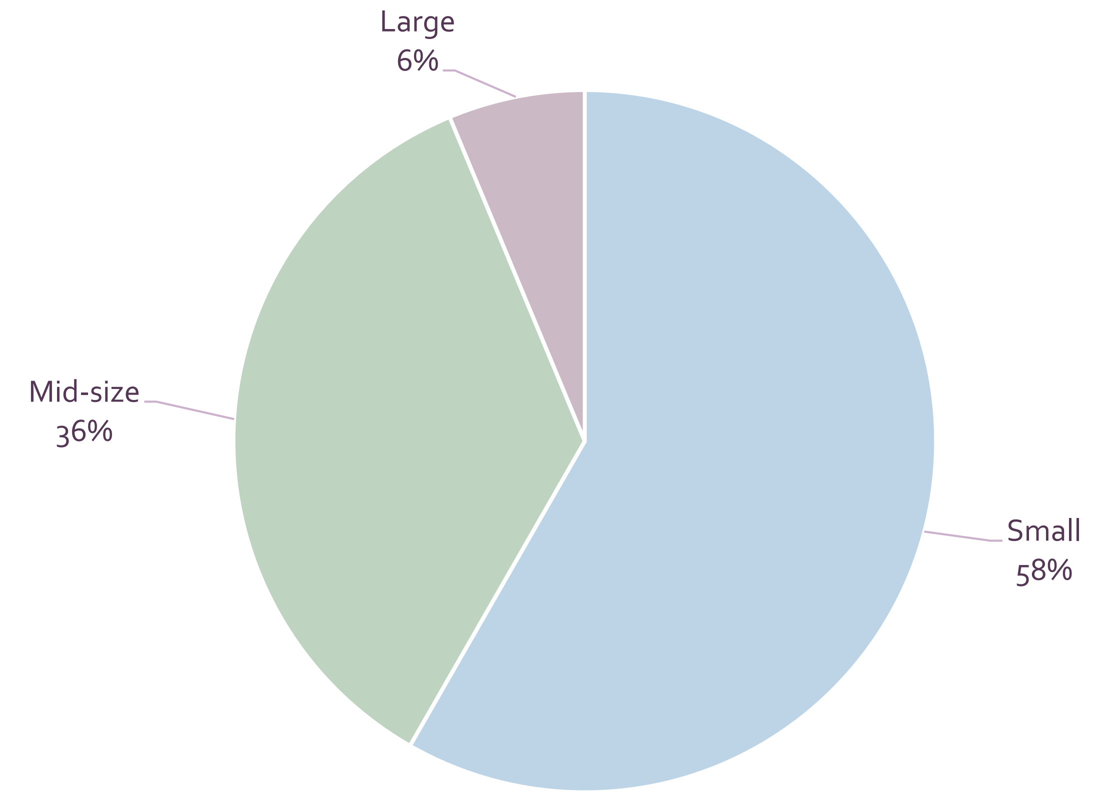
(All wineries; N=1,310; in %)



- In this sample, 70% of the participating wineries are located in Europe and the Caucasus (classified as Europe), while 30% are from overseas.

Size of participating wineries

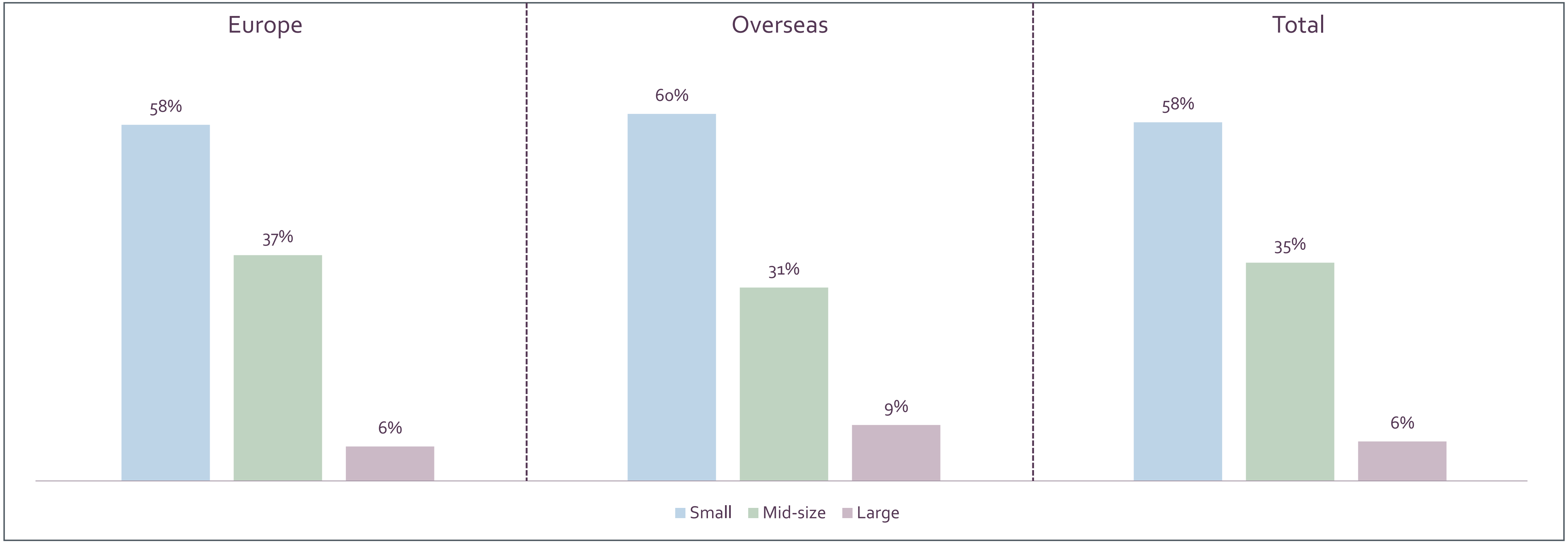
(All wineries; N=1,310; in %)



- In this sample, 58% of the wineries are small, 35% mid-sized, and only 6% are large.
- The specific sizes of wineries were not defined in greater detail to allow flexibility for a subjective assessment by the companies.
- The data indicates that the survey primarily reflects the perspective of small and mid-sized wine producers.

Size of participating wineries by origin

(All wineries; N=1,310; in %)

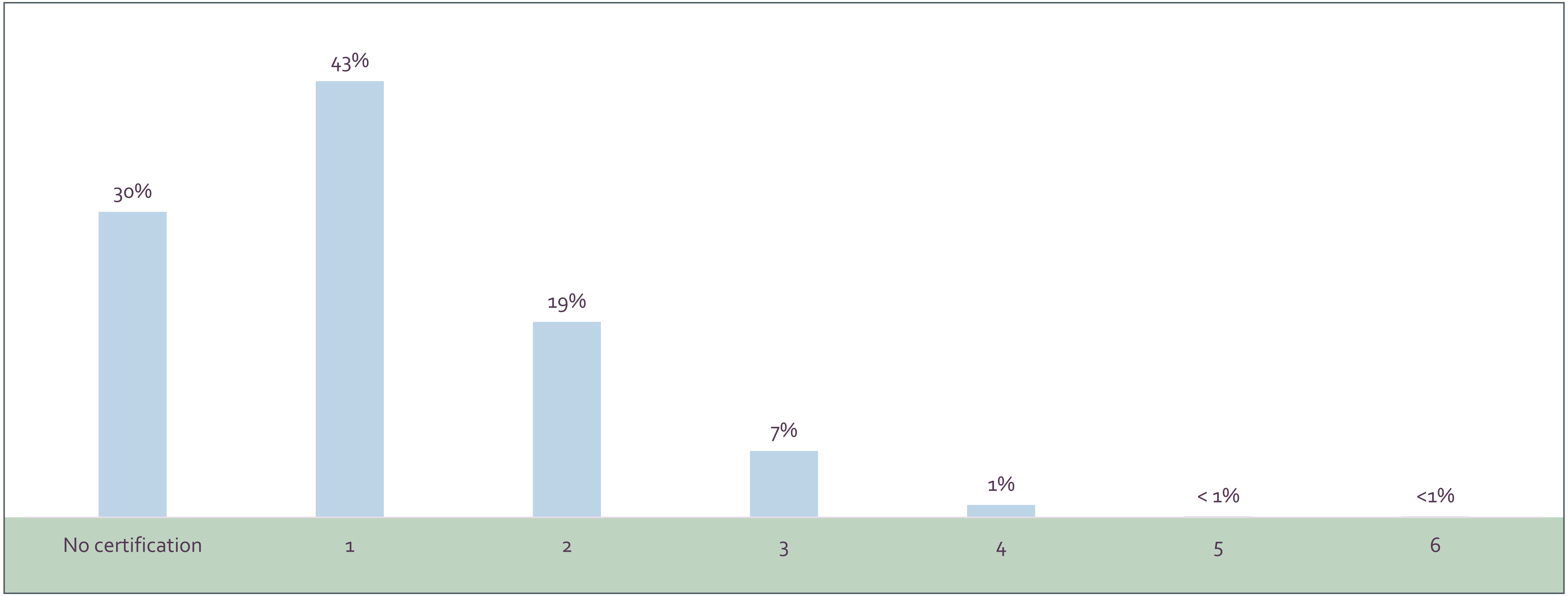


- Small wineries dominate in both Europe (58%) and overseas (60%), while large wineries represent only a minor share in both regions (6% in Europe, 9% overseas).
- The Chi-square test shows no statistically significant association ($p = 0.068$), indicating that the distribution of winery sizes does not differ by origin.

Chapter 2.2
Certification of the wineries

Number of certifications of the wineries

(All wineries; N=1,310; in %)

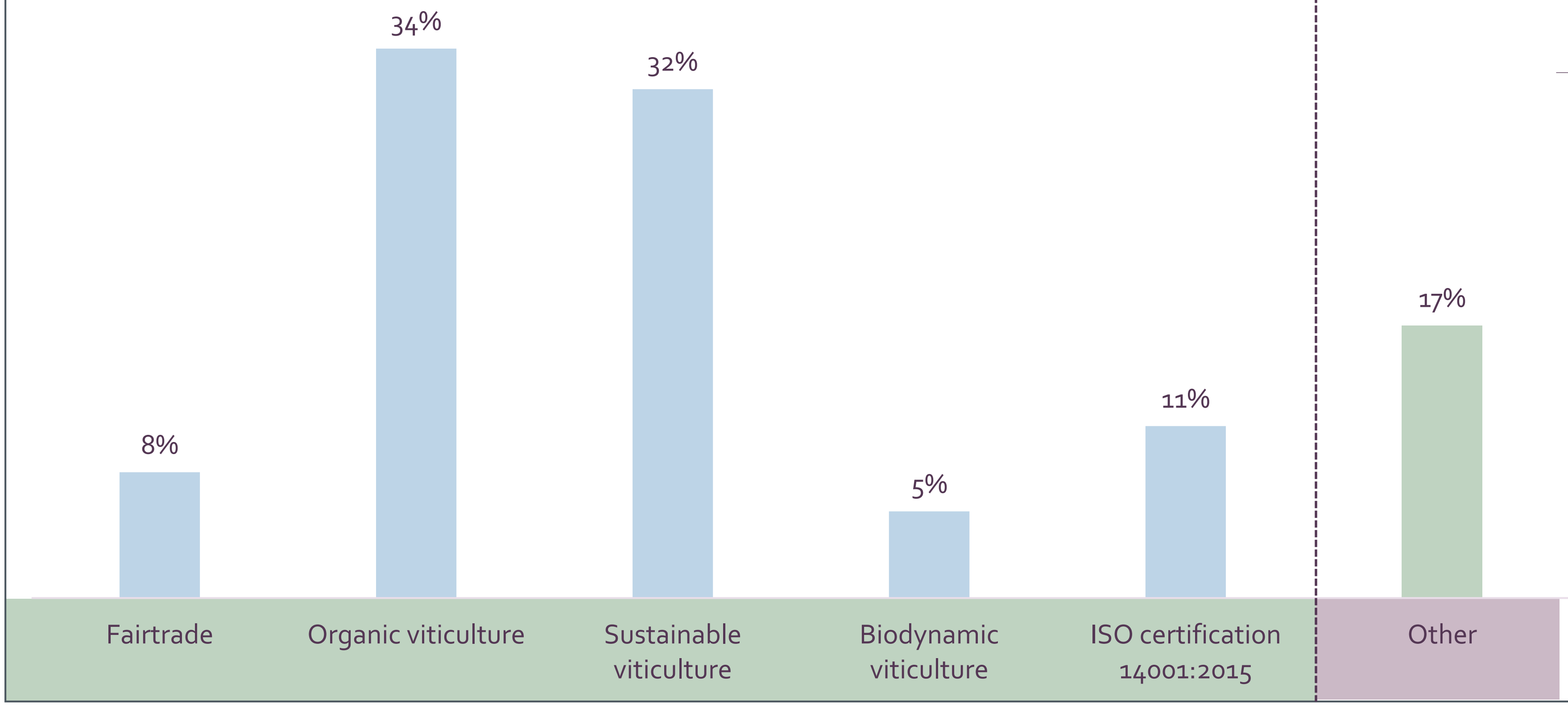


- In this sample, 30%of wineries have no certification, while the majority hold only one (43%).
- The number of wineries sharply declines with each additional certification, indicating that multiple certifications are relatively rare.

Certifications used by the wineries

(All wineries; N=1,310; in %)

Standard certifications – Response categories



Open answer – Other

(Most mentioned; absolute number)

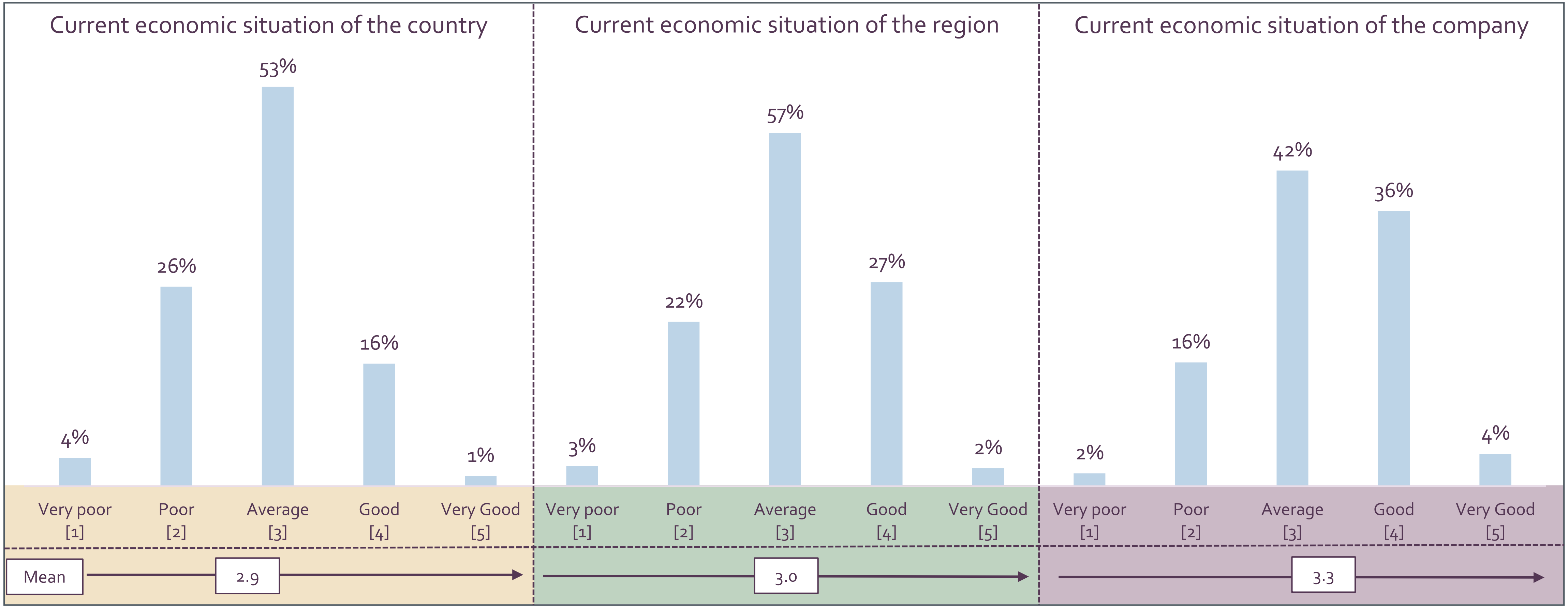
Certification Name	Count
IFS (incl. IFS FOOD, IFS 8, etc.)	20
HVE (all variants)	17
Vegan (incl. Vegan Certified, etc.)	8
Equalitas (all variants)	6
BRC (incl. BRCGS, BRC & IFS, etc.)	6
SQNPI (all variants)	5

- Organic viticulture (34%) and sustainable viticulture (32%) are the most frequently reported certification types among wineries.
- ISO 14001:2015, a well-known environmental management standard, was reported by 11% of respondents.
- Less common were Fairtrade (8%) and biodynamic viticulture (5%), suggesting more selective adoption.
- The "Other" category (17%) includes a wide range of certifications, most notably IFS (n=20), HVE (n=17), Vegan (n=8), Equalitas (n=6), BRC (n=6), and SQNPI (n=5), reflecting regional and thematic diversity in certification standards.

Chapter 2.3
Economic situation

Economic situation at different levels

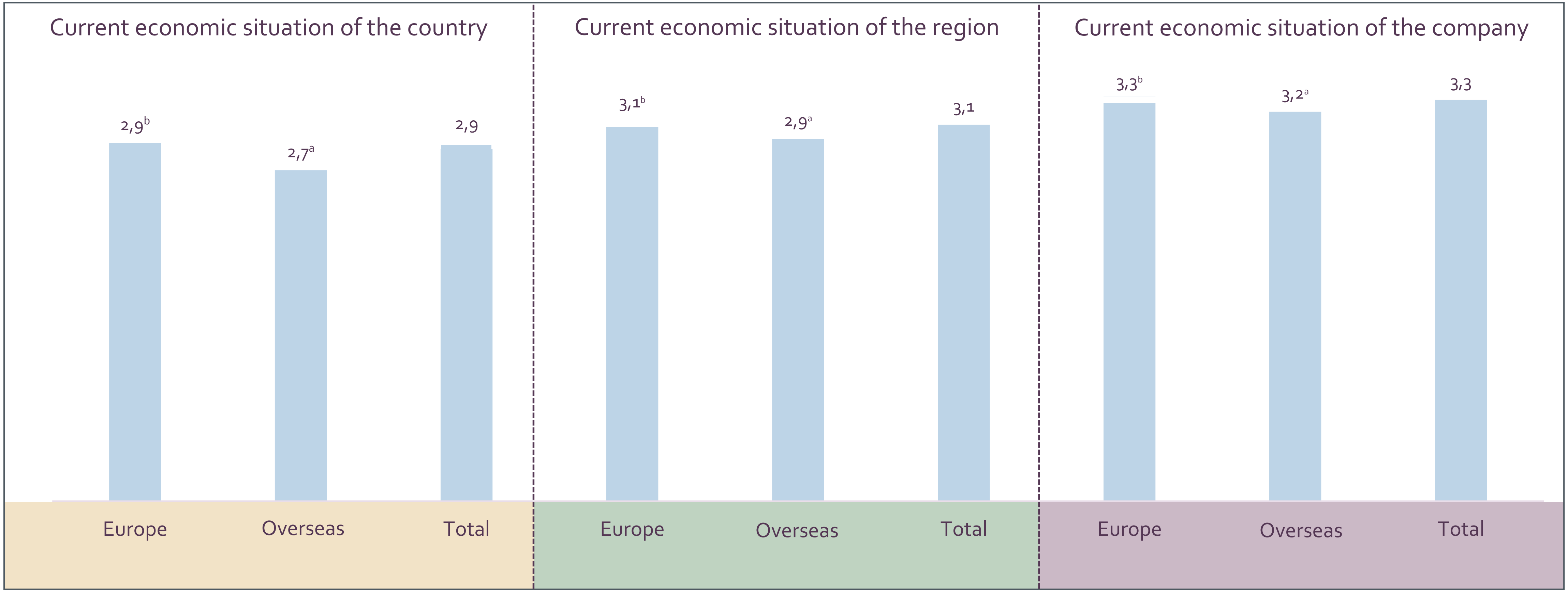
(All wineries; N=1,310; in %)



- The economic situation was most critically rated at the national level, where only 17% of respondents selected "Good" and "Very good" and the mean value was just 2.9.
- The regional level received slightly more positive ratings, with 29% stating "Good" and "Very Good" and a slightly higher mean of 3.0.
- Respondents viewed the economic situation of their own company most positively, with 40% choosing "Good" and "Very Good," resulting in the highest mean score of 3.3.

Economic situation at different levels by origin

(All wineries; N=1,310; mean on a 5-point scale)

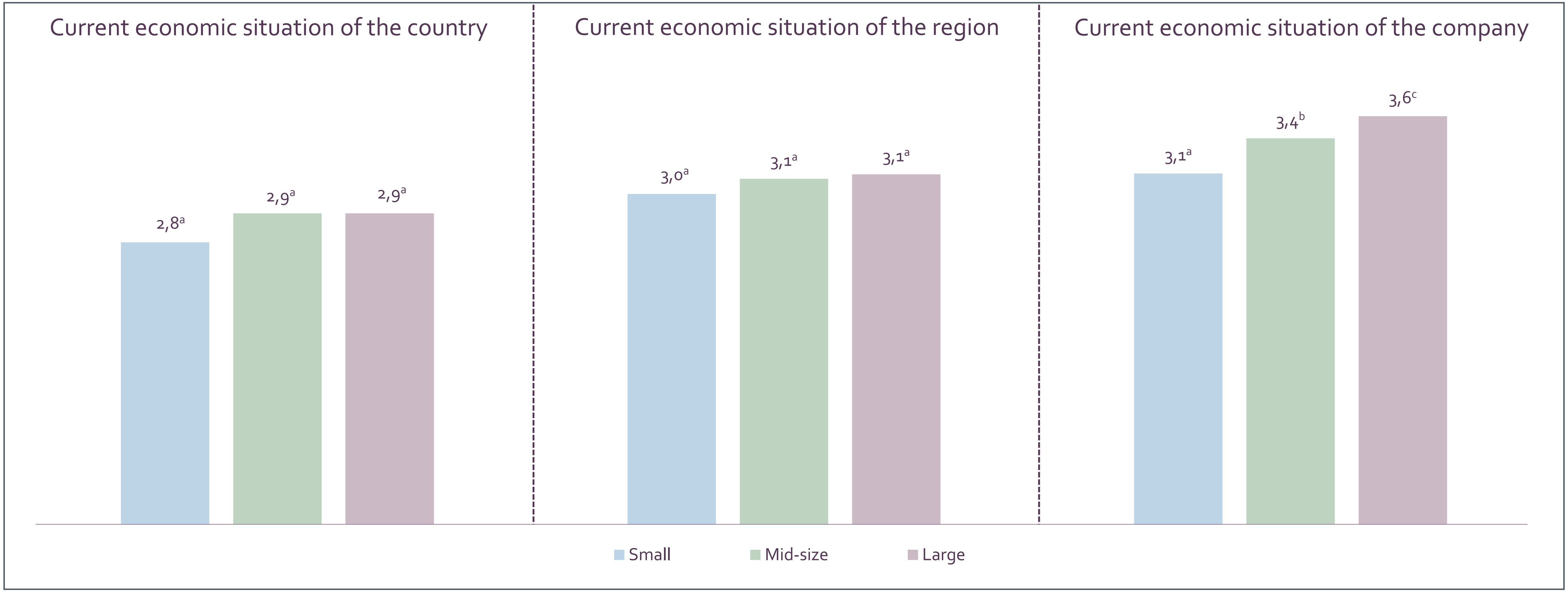


- Wineries from Europe rated the economic situation more positively than those from overseas across all levels.
- The difference is significant at the national level (2.9 vs. 2.7), as confirmed by ANOVA ($p < .001$).
- At the regional level, European respondents also gave slightly higher ratings (3.1 vs. 2.9), with the difference reaching statistical significance ($p = .007$).
- At the company level, the economic outlook was rated more favourably by European wineries as well (3.3vs. 3.2), although the difference is relatively modest ($p = .026$)

* Lowercase superscript letters (a, b, c) indicate significant differences between the sub-groups.

Economic situation at different levels by winery size

(All wineries; N=1,310; mean on a 5-point scale)



- Small, mid-size and large wineries rated the economic situation similarly at the country and regional level, with no significant differences.
- A clear difference emerges at the company level: larger wineries rated their own economic situation more positively (mean = 3.6) than mid-size (3.4) and small wineries (3.1).

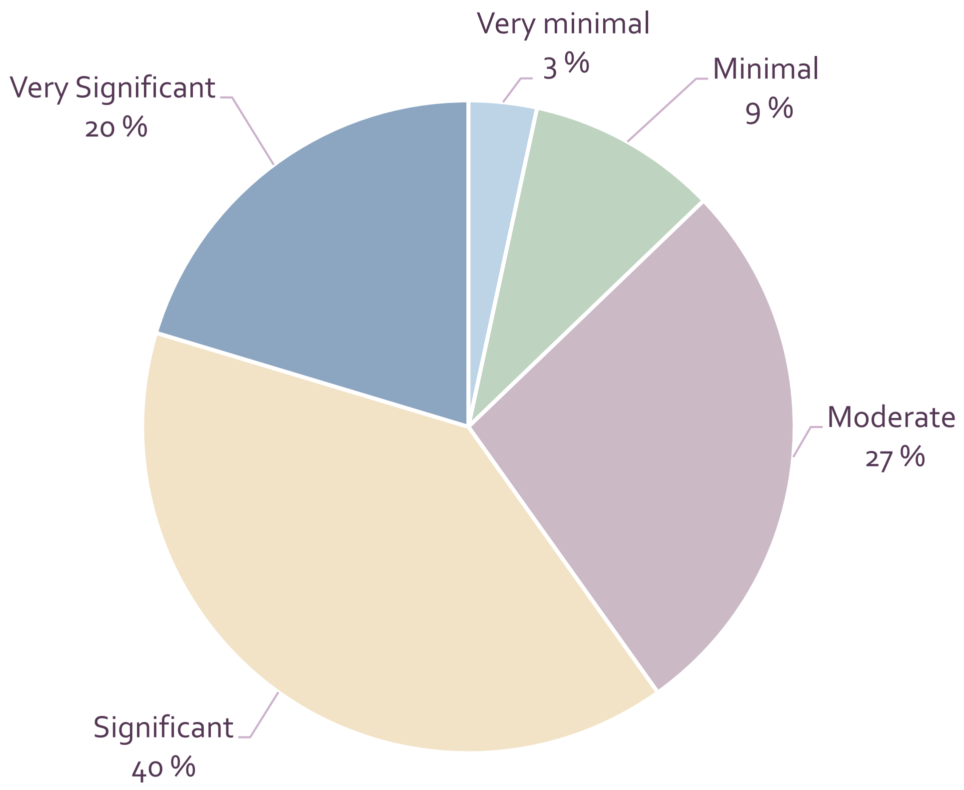
* Lowercase superscript letters (a, b, c) indicate statistically significant differences between subgroups.

Chapter 2.4

Impact of wine tourism in the region

Impact of wine tourism in the region

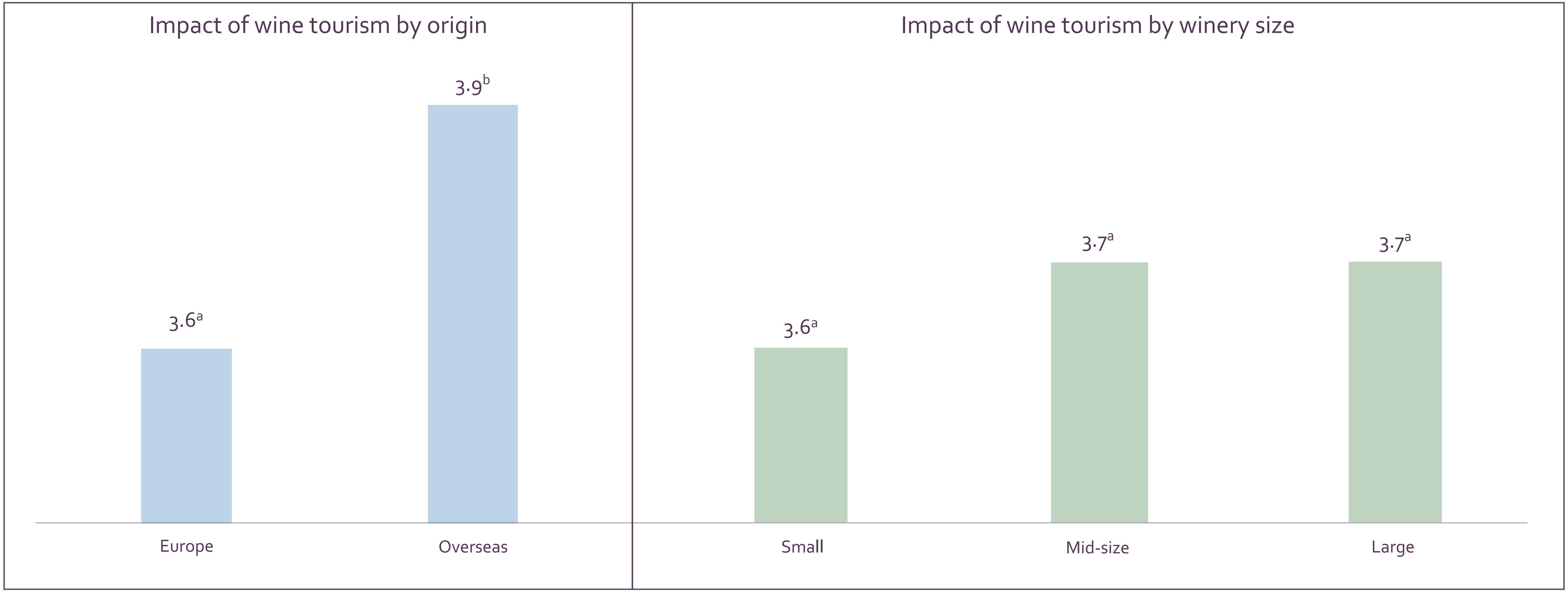
(All wineries; N=1,310; in %)



- A large majority of respondents consider wine tourism to have a significant (40%) or very significant (20%) economic impact in their region.
- A considerable share of respondents (27%) described the impact as moderate, suggesting a differentiated view depending on local context.
- Only a small portion rated the impact as minimal (9%) or very minimal (3%), indicating that low perceived relevance is rare.

Impact of wine tourism in the region by origin and winery size

(All wineries; N=1,310; mean on a 5-point scale)



- Wineries from overseas rated the economic impact of wine tourism more positively (mean = 3.9) than those from Europe (mean = 3.6), with the difference being statistically significant ($p < .001$).
- In contrast, no significant differences were found between winery sizes: small, mid-size and large wineries all rated the impact similarly (means between 3.6 and 3.7).
- This indicates that the perceived relevance of wine tourism is consistently high across different business sizes.

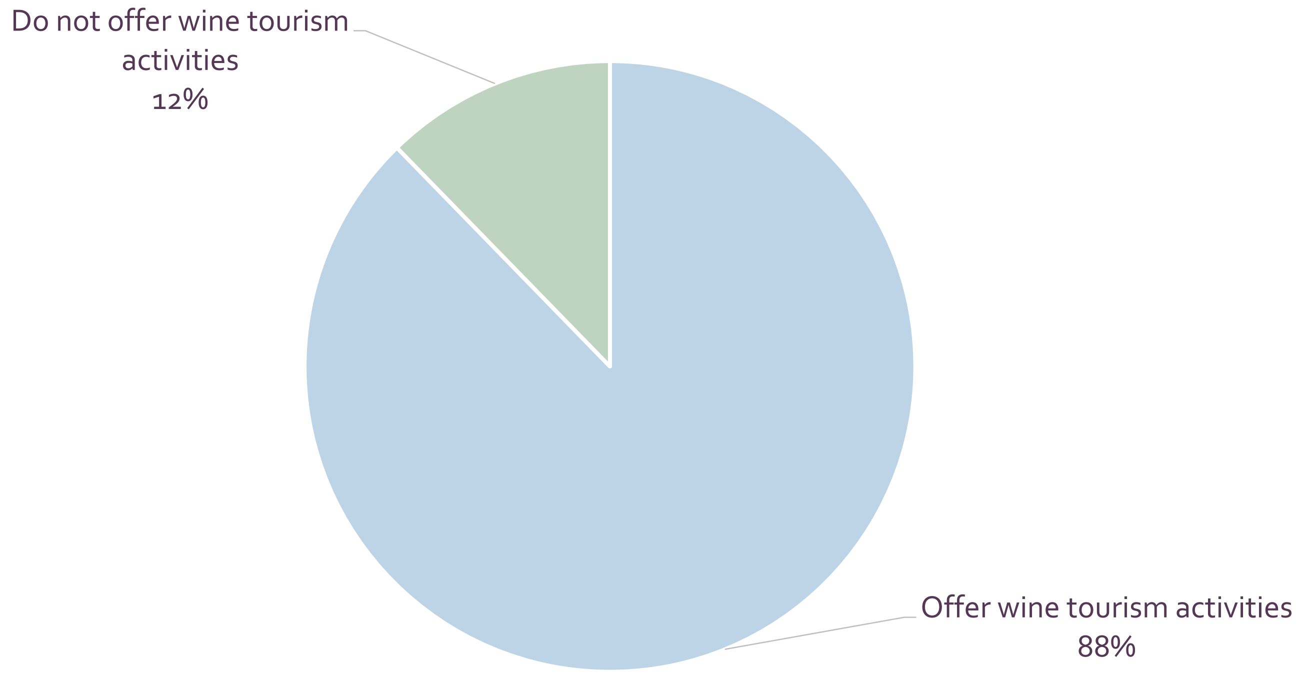
* Lowercase superscript letters (a, b, c) indicate statistically significant differences between the sub-groups. .

Chapter 2.5

Share of wineries offering wine tourism activities

Share of wineries offering wine tourism activities

(All wineries; N=1,310; in %)



- In this sample, 88% of the participating wineries offer wine tourism services.
- It does not, of course, reflect the overall situation in a representative way, as the survey attracted more interest from wineries already engaged in wine tourism. Therefore, we can state that this survey is representative of wineries worldwide that offer wine tourism activities.

Chapter 3

Wineries without wine tourism activities

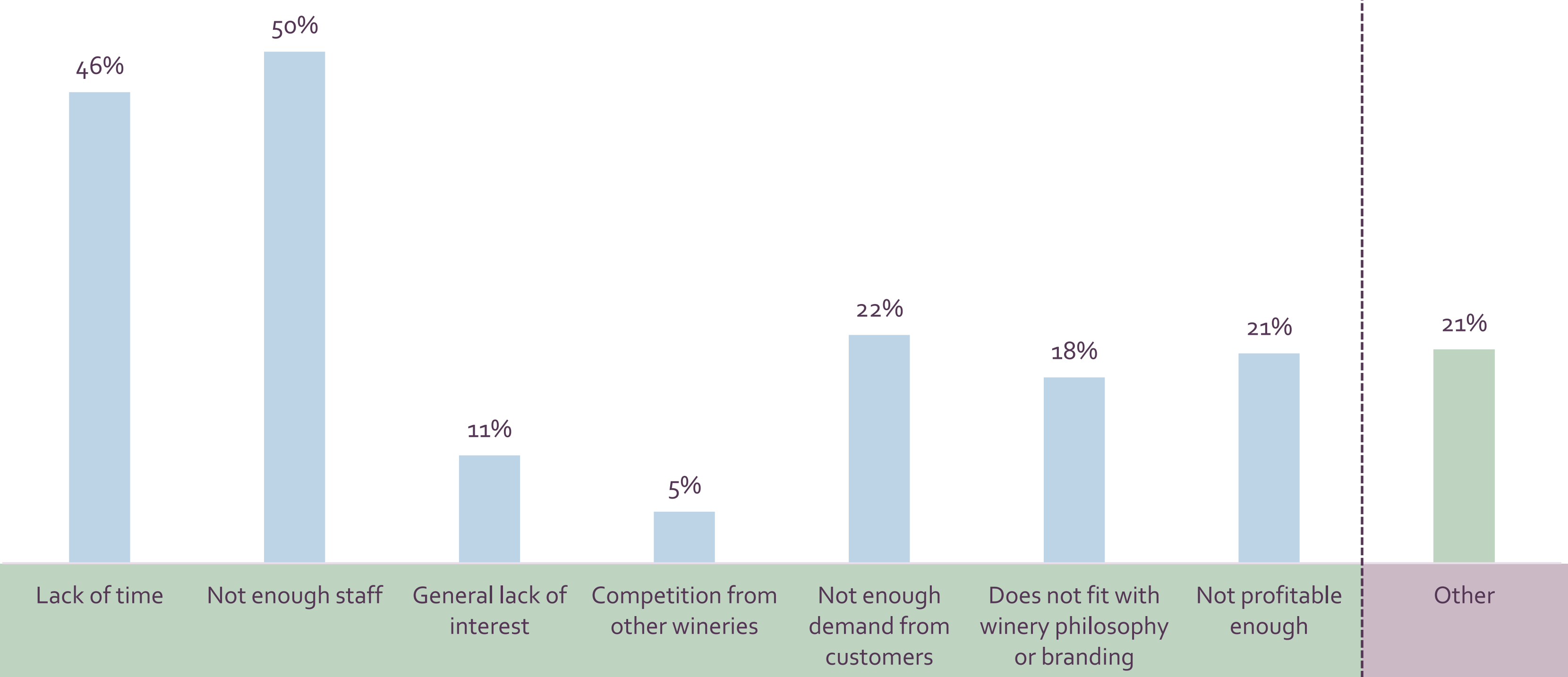
Chapter 3.1

Reasons for not offering wine tourism activities

Reasons for not offering wine tourism activities

(Wineries without wine tourism; N=160; in %)

Reasons not offering wine tourism activities – Response categories



Open answer – Other

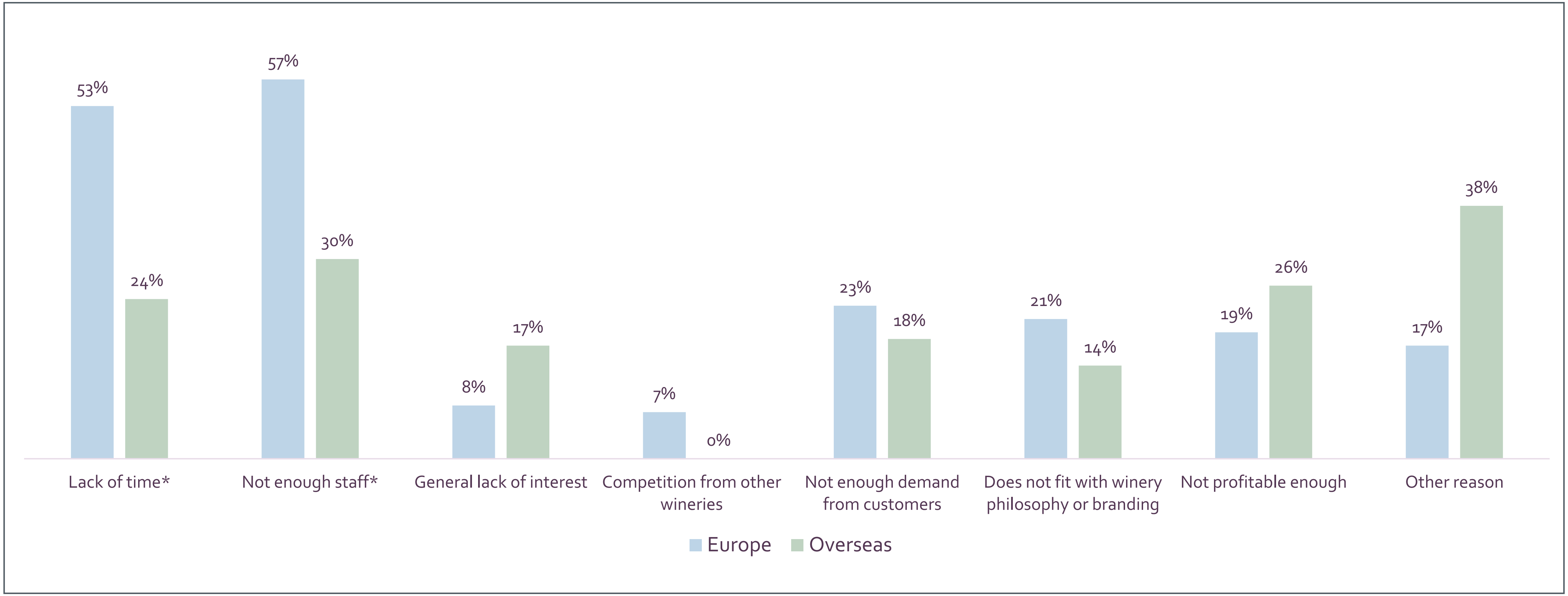
(Most mentioned; in %)

Reason	Share (%)
Under development/ planned	7%
Focus on production/ export	4%
Lacking infrastructure	4%
Low priority	3%
Not a typical winery	2%

- Lack of staff (50%) and lack of time (46%) are by far the most commonly cited barriers to offering wine tourism services.
- Around one in five wineries mention low profitability (21%), lack of customer demand (22%), or misalignment with brand philosophy (18%) as reasons for not engaging in wine tourism.
- General disinterest (11%) and competitive pressure (5%) are less frequently mentioned, suggesting external market factors play a minor role.
- The category “Other” (21%) includes diverse, free-text responses – mostly related to infrastructure (4%), company focus (4%), or early-stage development (7%).

Reasons for not offering wine tourism activities by origin

(Wineries without wine tourism; N=160; in %)

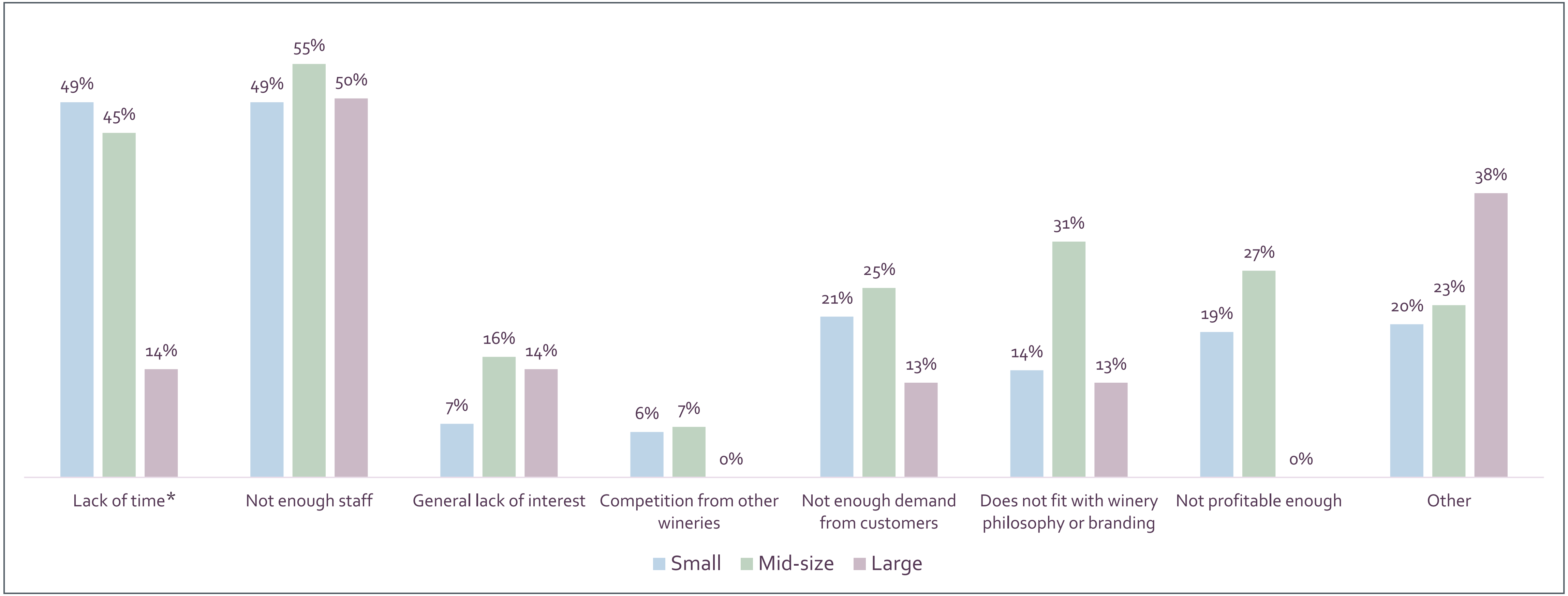


- European wineries most frequently cited lack of time (53%) and lack of staff (57%) as barriers, significantly more often than their overseas counterparts (24% and 30%, respectively).
- Overseas wineries were more likely to indicate unprofitability (26%), general lack of interest (17%) and "other reasons" (38%), suggesting more diverse or structural challenges outside the predefined categories.
- Lack of profitability was more commonly cited overseas (26%) than in Europe (19%), possibly reflecting different business models or cost structures.
- Differences in market demand and branding alignment were mentioned in both regions, but without major divergence (e.g., 23% vs. 18% for demand).

* Significant differences between the subgroups.

Reasons for not offering wine tourism by winery size

(Wineries without wine tourism; N=160; in %)

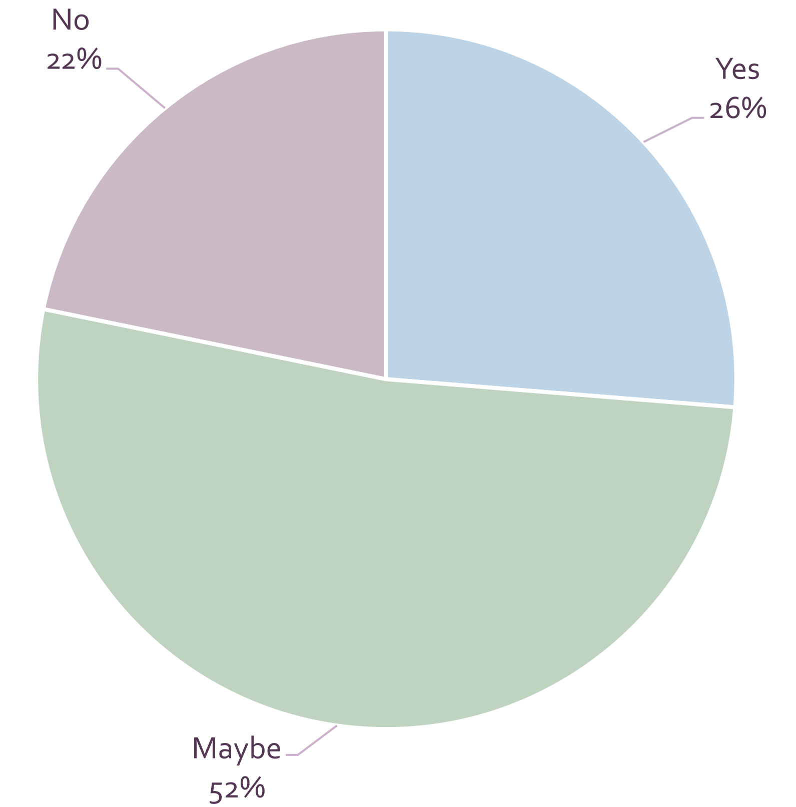


- Small and mid-size wineries most frequently cite lack of time (49% and 45%) and not enough staff (49% and 55%) as main reasons against offering wine tourism, while large wineries mention these less often (14% each).
- Large wineries most frequently select "Other" reasons (38%), suggesting more diverse or individual factors beyond the predefined categories.
- Profitability concerns are relevant mainly for mid-size wineries (27%) but are not cited at all by large wineries (0%), indicating different economic considerations.
- Although some differences between winery sizes are visible, no statistically significant relationship between size and the stated reasons for not offering wine tourism could be confirmed ($p > 0.05$), except for lack of time. * Significant differences between the subgroups.

Chapter 3.2
Intention to offer wine tourism activities in future

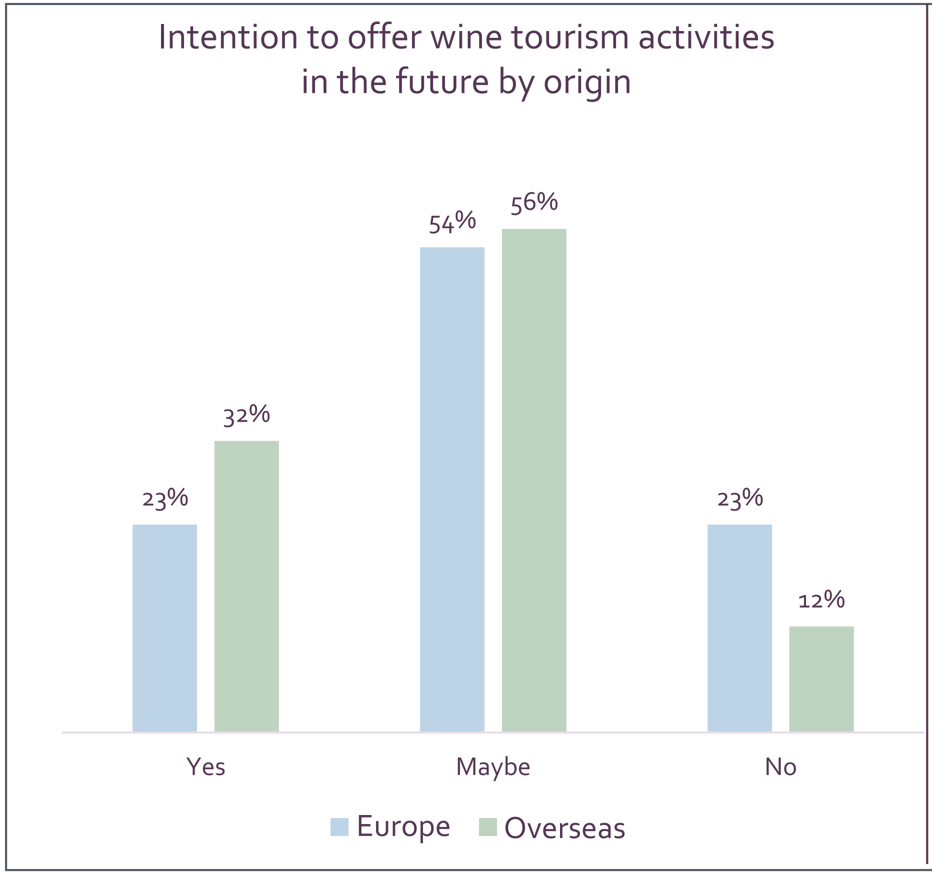
Intention to offer wine tourism activities in the future

(Wineries without wine tourism; N=160; in %)



- 26% have already decided to implement wine tourism activities.
- 52% of respondents who currently do not offer wine tourism are considering introducing it in the future.
- Only 22% clearly exclude wine tourism for the future.
- Overall, there is strong development potential among wineries not yet active in this segment.

Intention to offer wine tourism activities in the future by origin and winery size (Wineries without wine tourism; N=160; in %)



- The majority of wineries, both in Europe and overseas, are still undecided about their future involvement in wine tourism,
- No significant regional difference was found in future plans ($p = 0.278$).
- Large wineries are more likely to plan wine tourism activities (50% "Yes"), but also show more polarized responses, with a higher share of "No" answers (38%).
- A statistically significant difference was found based on winery size ($p = 0.031$), particularly among large producers.

* Significant differences between the subgroups.

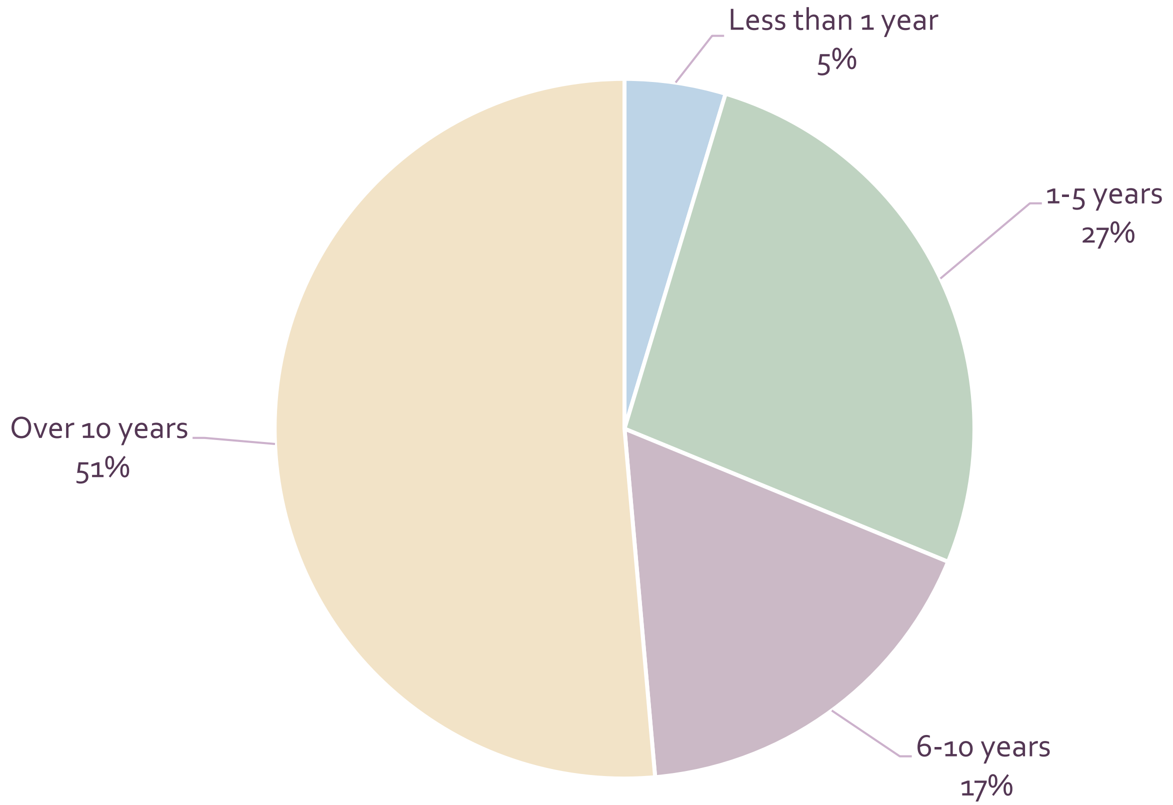
Chapter 4
Wineries offering wine tourism activities

Chapter 4.1

Number of years wineries have offered wine tourism activities

Years offering wine tourism activities

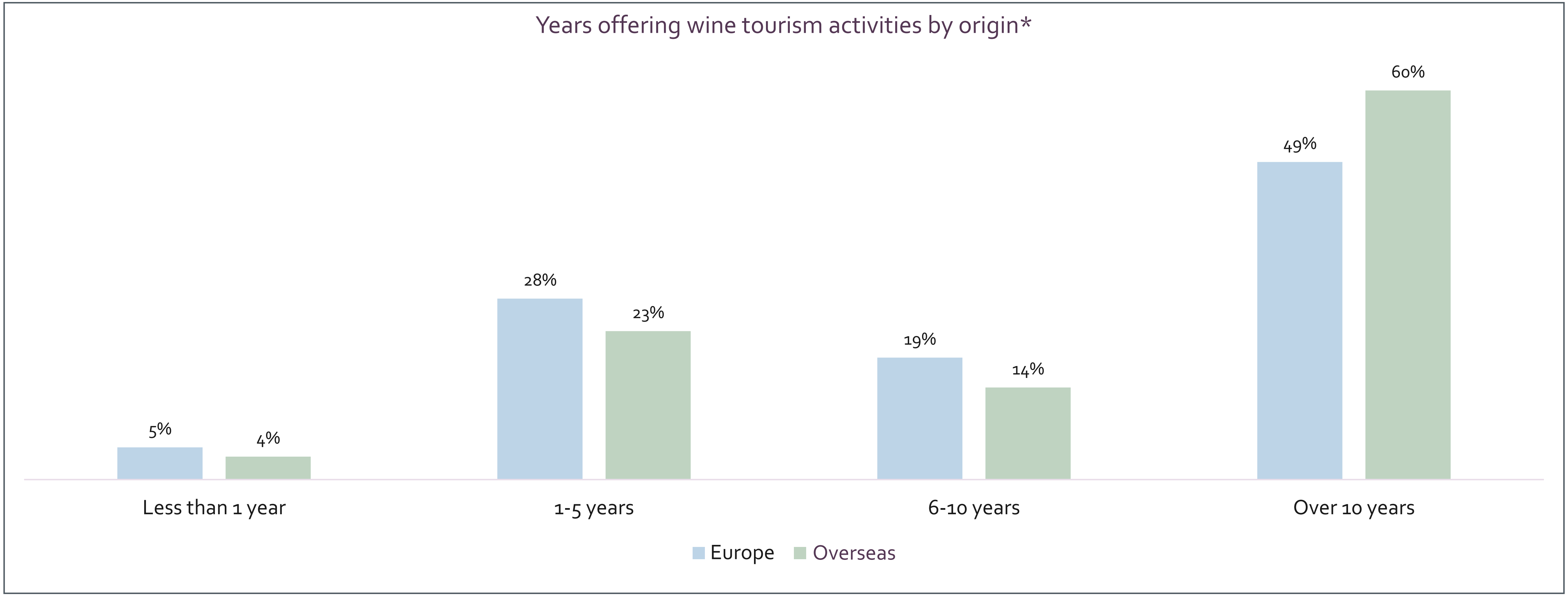
(Only wineries with wine tourism; N=1,149; in %)



- Over half of the wineries (51%) have been engaged in wine tourism for more than 10 years, indicating strong experience in the field.
- A combined 44% of wineries started within the last 1–10 years, reflecting continued interest and growth.
- Only 5% are newcomers (less than 1 year), suggesting a relatively slow recent uptake.

Years offering wine tourism activities by origin

(Only wineries with wine tourism; N=1,149; in %)

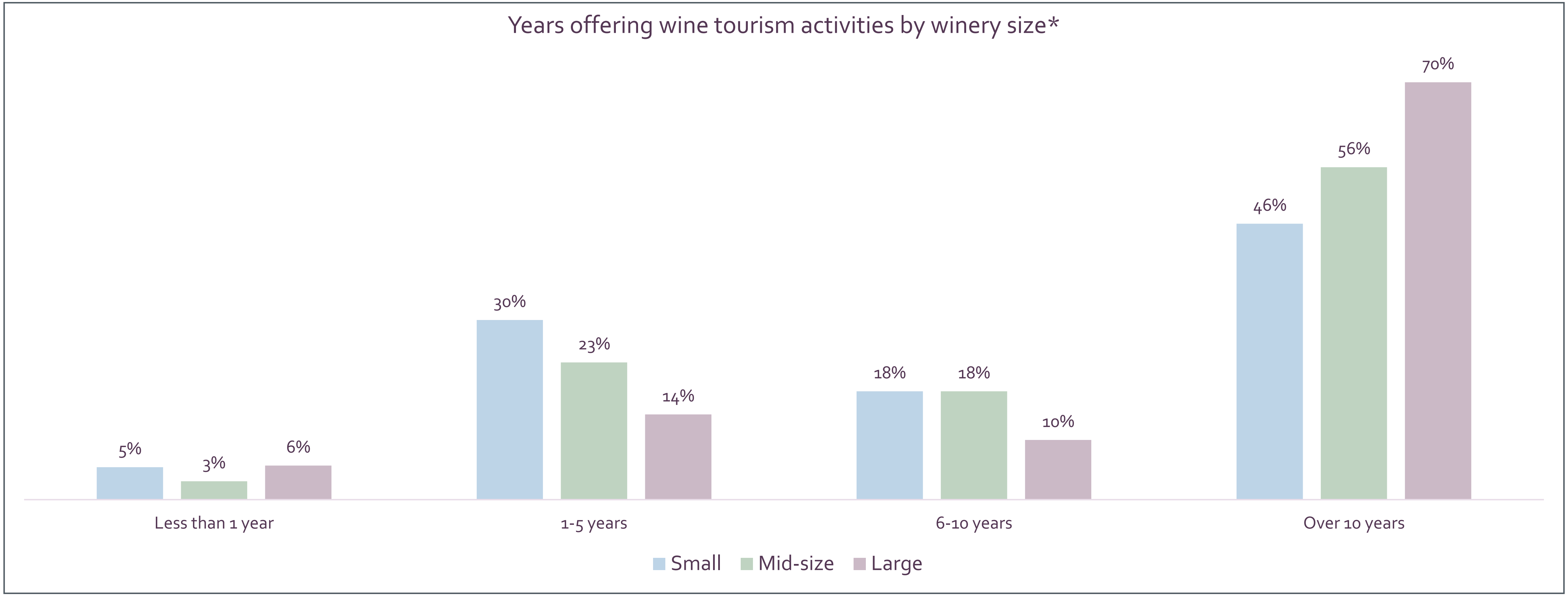


- Most wineries have been offering wine tourism for over 10 years, especially in overseas regions (60%) compared to Europe (49%).
- European wineries show slightly higher shares in the 1–5 years (28%) and 6–10 years (19%) categories compared to overseas wineries.
- The results suggest that wine tourism was adopted earlier by overseas wineries than by their European counterparts.
- The Chi-square test indicates a statistically significant association between region and the duration of wine tourism activities ($p = 0.022$).

* Significant differences between the subgroups.

Years offering wine tourism activities by winery size

(Only wineries with wine tourism; N=1,149; in %)



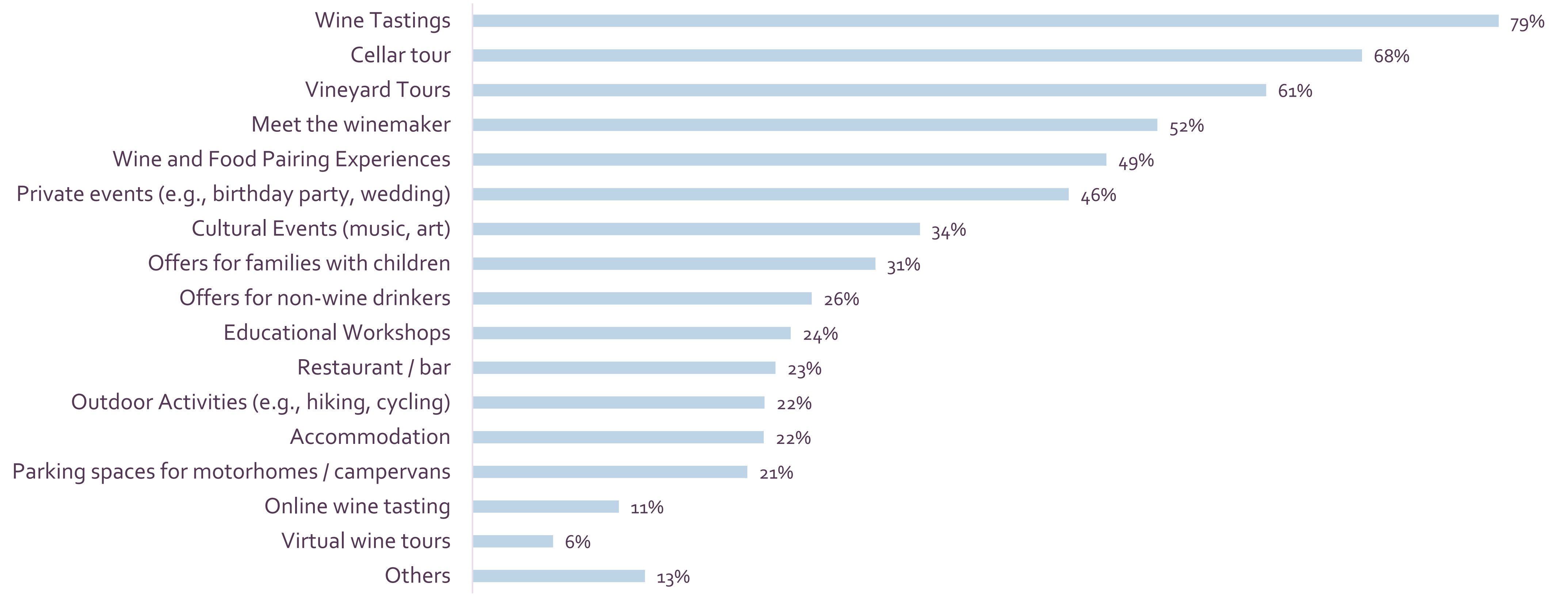
- Most wineries have been offering wine tourism for over 10 years (51%), with large wineries showing the highest proportion (70%).
- Small wineries are more active in recent adoption, with 30% having started in the past 1–5 years.
- A clear size-based pattern is visible: larger wineries have been offering wine tourism for longer periods (more than 10 years).
- A significant relationship between winery size and how long wineries have been offering wine tourism was confirmed (Chi-square test; $p = 0.001$).

* Significant differences between the subgroups.

Chapter 4.2
Types of wine tourism activities offered

Types of wine tourism activities offered

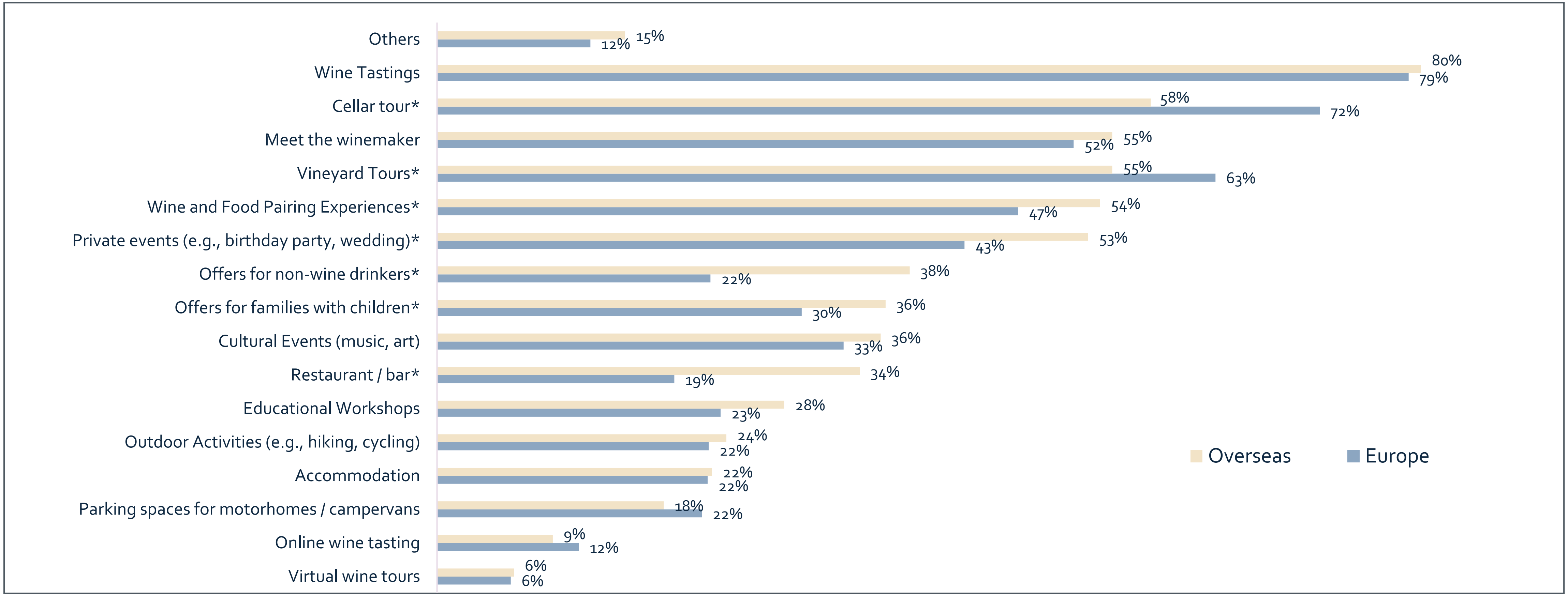
(Only wineries with wine tourism; N=1,149; in %)



- Wine tastings (79%), cellar tours (68%) and vineyard tours (61%), are the most commonly offered wine tourism activities.
- Food-related experiences like wine and food pairings are provided by nearly half of the wineries (49%).
- Interactive and cultural activities such as meeting the winemaker (52%) and private events (46%) are also widely available.
- Digital offerings like virtual tours (6%) and online tastings (11%) remain rare.

Types of wine tourism activities offered by origin

(Only wineries with wine tourism; N=1,149; in %)

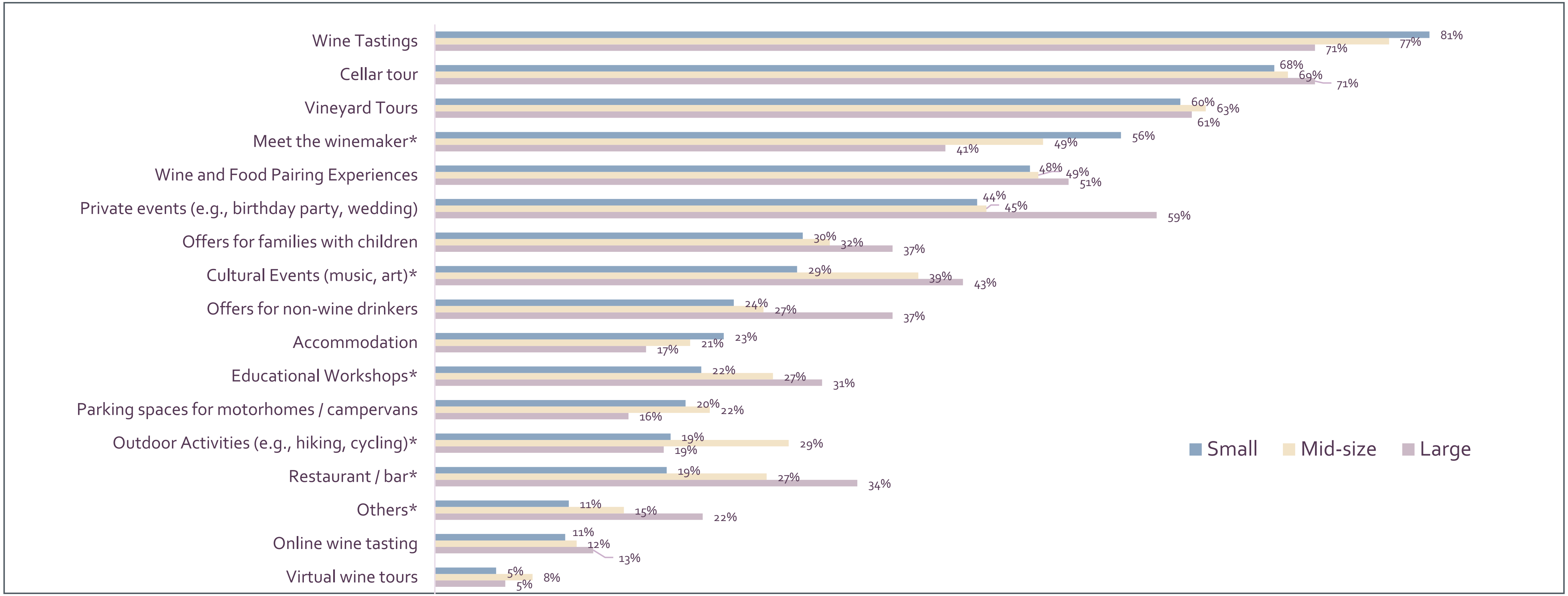


- Wine tourism offerings differ significantly between Europe and overseas wineries in some categories, such as cellar tours, restaurants/bars, private events and offerings for non-wine drinkers.
- European wineries are significantly more likely to offer cellar tours (72%) than their overseas counterparts (58%), supported by a highly significant Chi-square result ($p < 0.001$).
- Overseas wineries are more likely to provide offerings such as private events (52.9%) and options for non-wine drinkers (38.4%), both showing statistically significant differences ($p < 0.01$).
- Wine tastings, vineyard tours, and meet-the-winemaker experiences are among the most common offerings in both regions, though differences in frequency are mostly not statistically significant.

* Significant differences between the subgroups. .

Types of wine tourism activities offered by winery size

(Only wineries with wine tourism; N=1,149; in %)



- Large wineries offer significantly more restaurants/bars, cultural events, educational workshops and "other" offerings ($p < 0.05$).
- A clear trend is visible: larger wineries are more likely to offer cultural and educational experiences.
- Traditional offerings like wine tastings, cellar tours and vineyard tours show no significant variation by winery size.
- Some innovative formats (e.g. virtual tours, online tastings) are still rare across all sizes and show no significant differences.

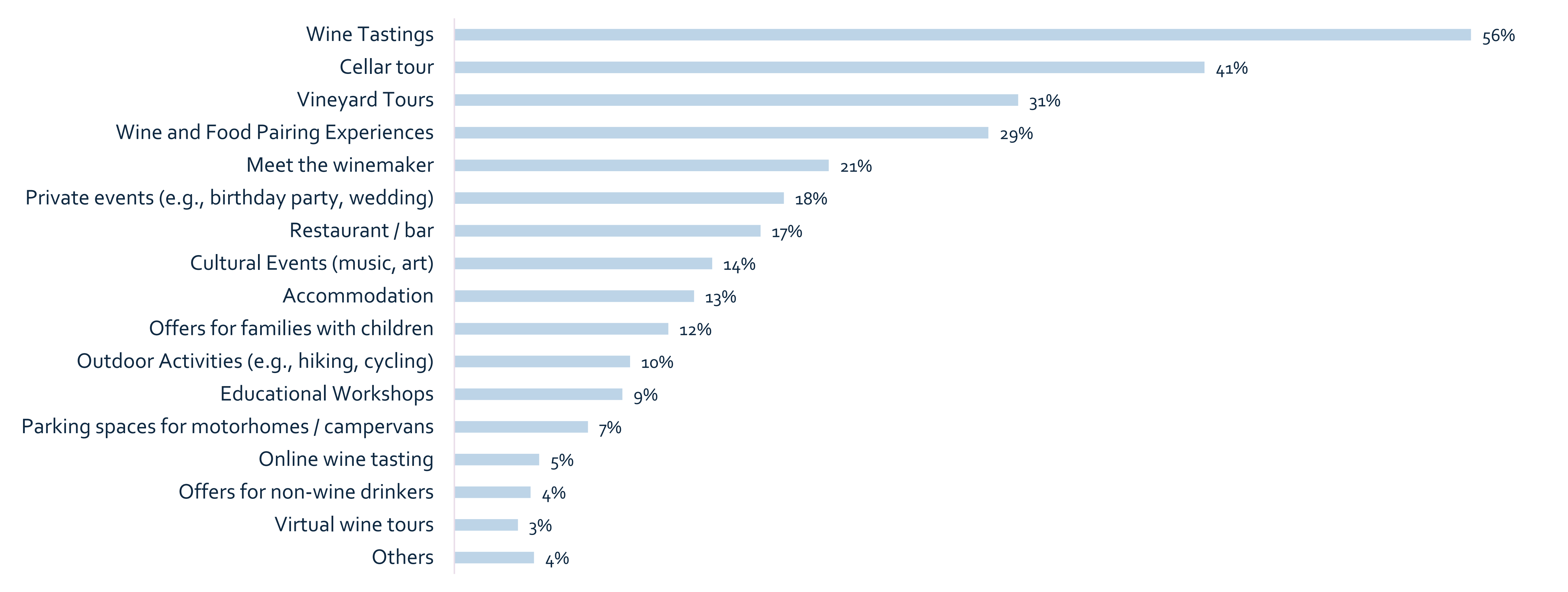
* Significant differences between the subgroups.

Chapter 4.3

Popularity of wine tourism activities

Popularity of wine tourism activities

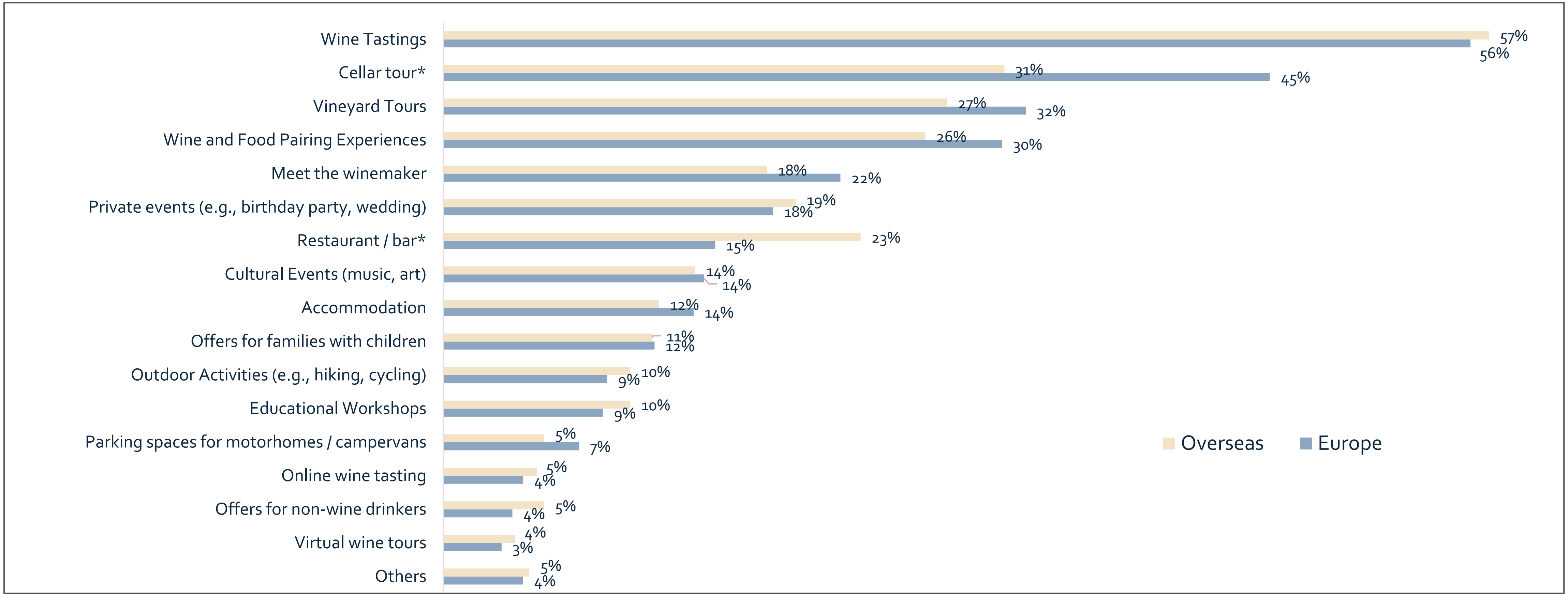
(Only wineries with wine tourism; N=1,149; in %)



- Wine tastings (56%), cellar tours (41%) and vineyard tours (31%) are the most popular activities among wine tourists.
- Experiences like food pairings (29%) and meeting the winemaker (21%) also rank high in visitor interest.
- Cultural and educational formats, such as events (14%) or workshops (9%), appeal to smaller, niche segments.
- Digital formats like virtual tours (3%) and online tastings (5%) show very low popularity, indicating limited visitor demand.

Popularity of wine tourism activities by origin

(Only wineries with wine tourism; N=1,149; in %)

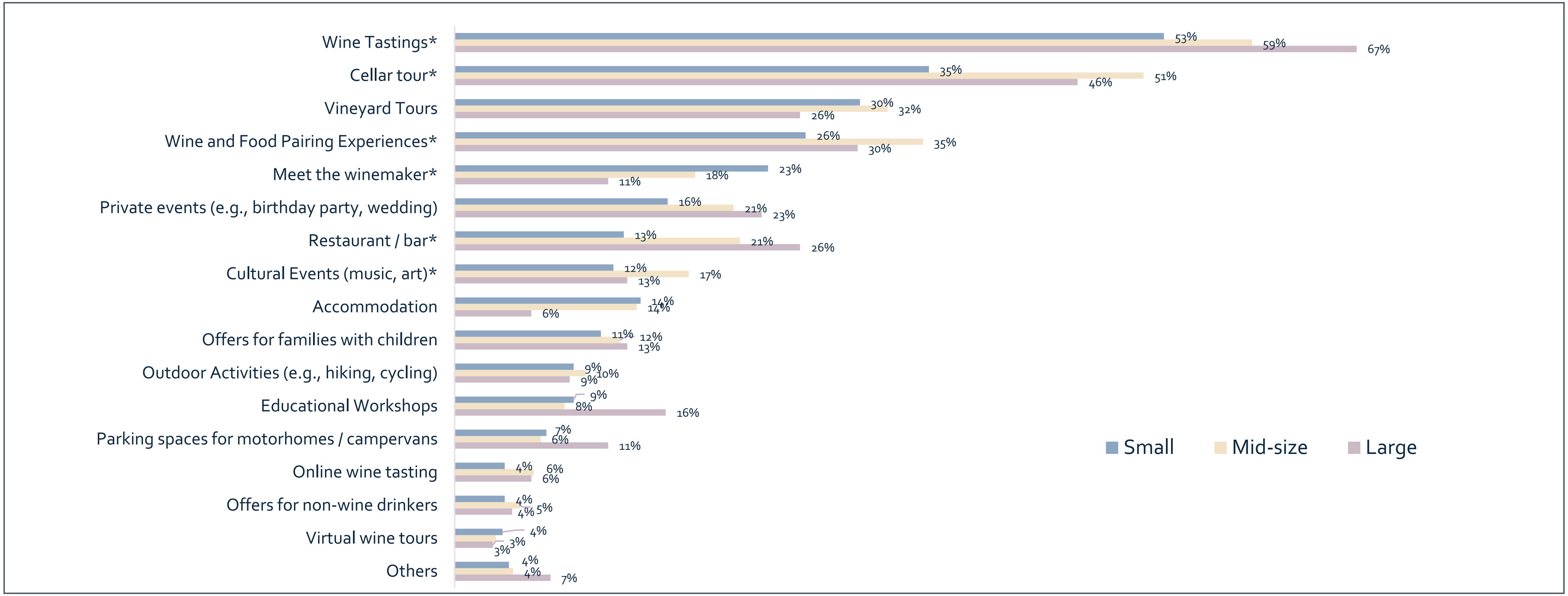


- Wine tastings are by far the most popular activity among both European and overseas respondents (56%).
- Cellar tours and vineyard tours also rank high, though cellar tours show significantly higher popularity in Europe ($p < 0.001$).
- Restaurant/bar visits are notably more popular among overseas wineries ($p < 0.01$).
- Less traditional or digital formats, such as virtual wine tours or online tastings, remain niche with low popularity across both regions.

* Significant differences between the subgroups.

Popularity of wine tourism activities by winery size

(Only wineries with wine tourism; N=1,149; in %)



- Wine tastings, cellar tours and wine and food pairing experiences were rated significantly more popular by larger wineries ($p < 0.05$), indicating a strong link between winery size and perceived popularity.
- Activities such as restaurant/bar visits and cultural events also showed statistically significant differences across winery sizes, as larger wineries rating them more popular.
- For most other offerings (e.g., educational workshops, online wine tastings, offers for families), no significant differences were found based on winery size ($p > 0.05$).
- Vineyard tours, though among the top activities overall, did not show significant variation in popularity across winery sizes ($p = 0.515$).

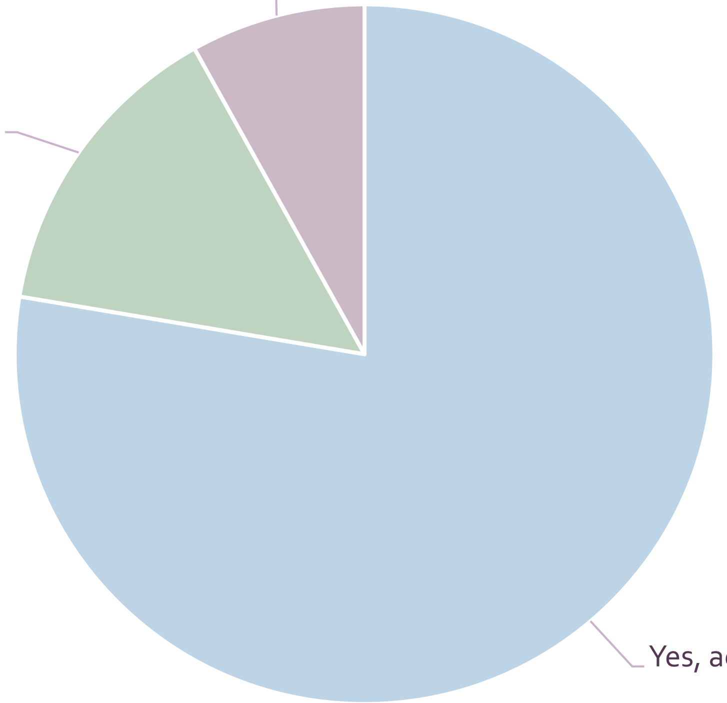
* Significant differences between the subgroups.

Chapter 4.4

Collaboration with organizations to enhance wine tourism experiences

Collaboration with organizations

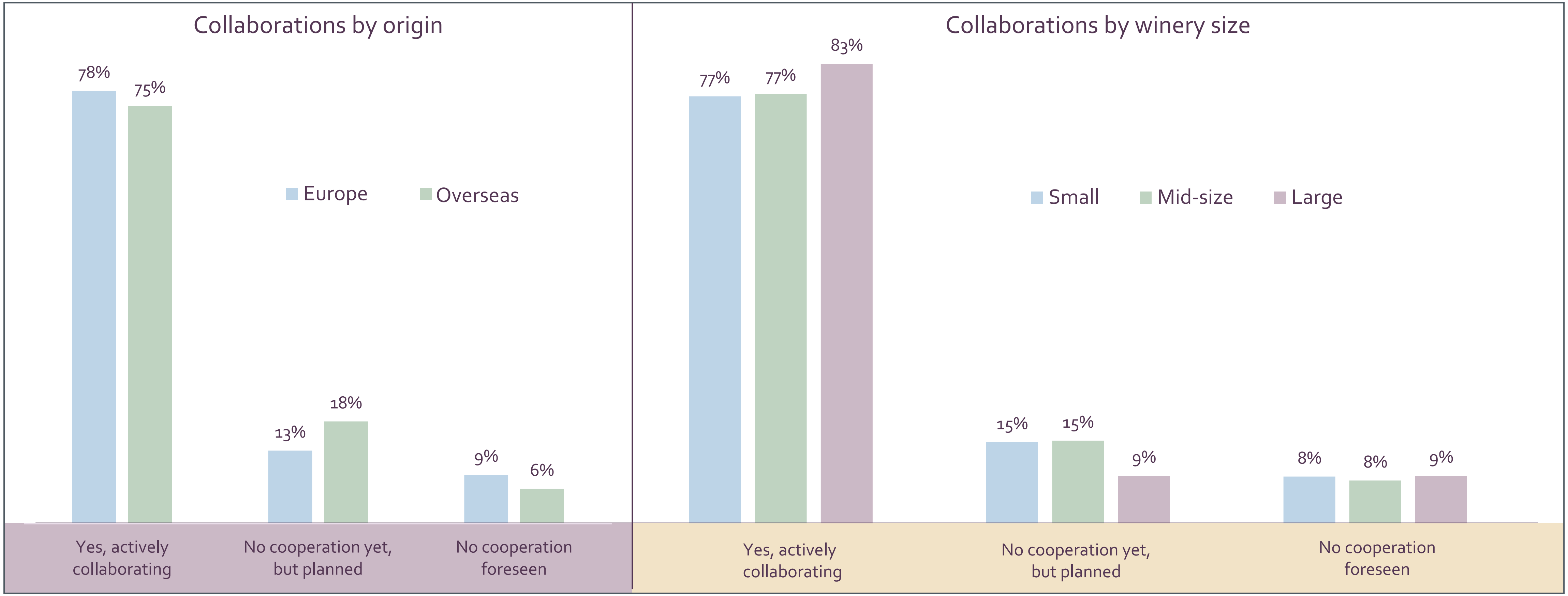
(Only wineries with wine tourism; N=1,149; in %)



- A clear majority of wineries (78%) already engage in cooperation, highlighting the widespread importance of partnerships in the wine tourism sector.
- 14% of respondents do not currently collaborate but plan to do so in the future, indicating growing interest in cooperative strategies.
- Only 8% reported neither existing collaborations nor plans for any, suggesting that non-cooperative approaches are relatively rare.
- The overall results underline a strong collaborative culture among wineries, which may contribute to improved regional branding and shared customer experiences.

Collaboration with organizations by origin and winery size

(Only wineries with wine tourism; N=1,149; in %)



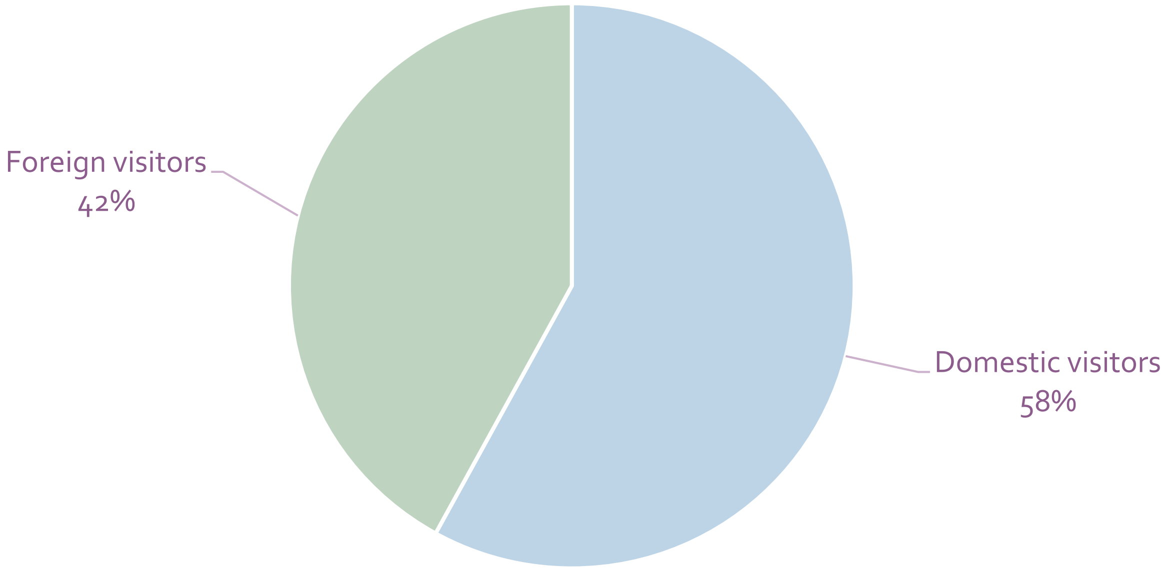
- Cooperation is widely practiced across all regions and winery sizes, with 78% of European and 75% overseas wineries reporting existing collaborations.
- Large wineries are slightly more likely to have established collaborations (83%) than small or mid-size wineries (both 77%).
- A greater share of overseas wineries (18%) than European ones (13%) are planning future cooperation, indicating emerging collaborative interest outside of Europe.
- The share of wineries not planning any cooperation is consistently low (6–9%) across all categories, highlighting a sector-wide orientation toward partnership strategies.
- There are no significant differences between the subgroups.

Chapter 4.5
Visitors

Number of visitors per year and share of domestic visitors

(Only wineries with wine tourism; N=866; median in total; mean in %)

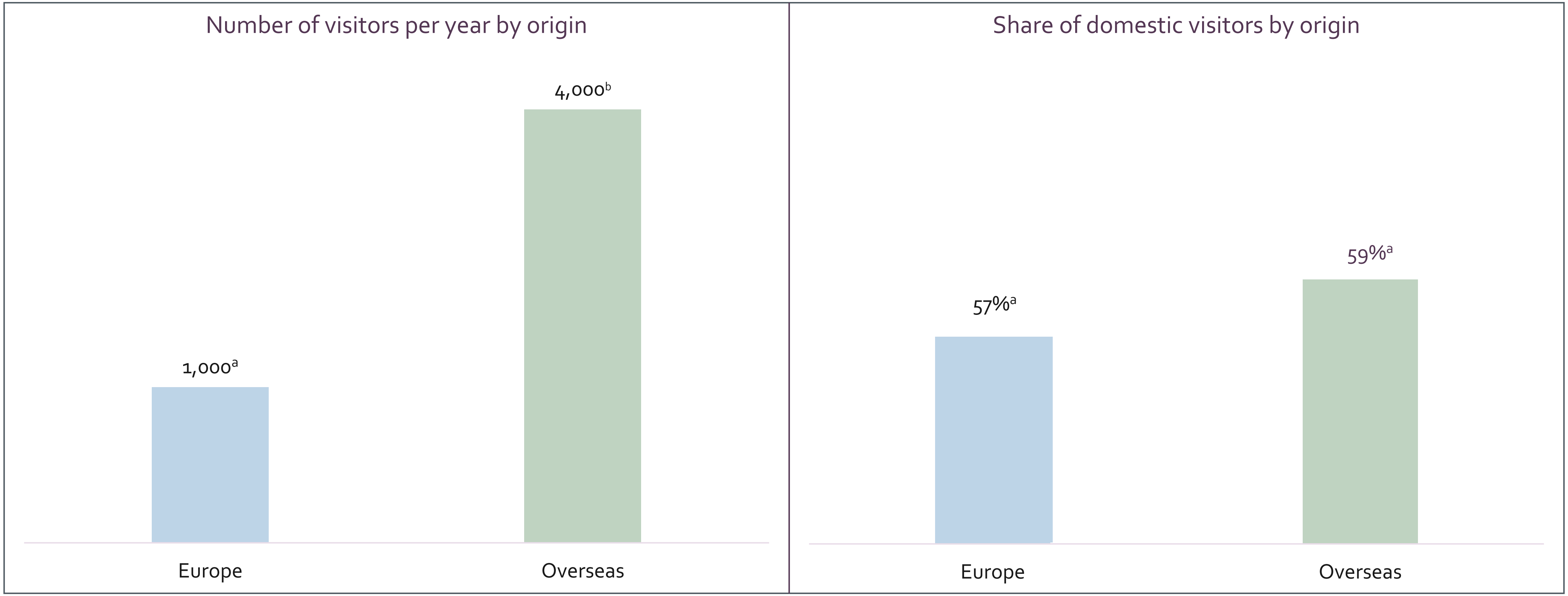
Minimum	Median	Maximum
10	1,500	250,000



- Wineries report a median of 1,500 visitors per year, ranging from a minimum of 10 to a maximum of 250,000 visitors, indicating wide variability in visitor volume.
- The majority of wine tourists are domestic visitors, accounting for 65% of total visitors, while 35% come from abroad.
- The high domestic share reflects strong national interest in wine tourism, but the foreign segment still represents a significant portion of demand.
- The data suggest potential for further international visitor development, especially for wineries already receiving large volumes.

Number of visitors per year and share of domestic visitors by origin

(Only wineries with wine tourism; N=866; median in total; mean in %)

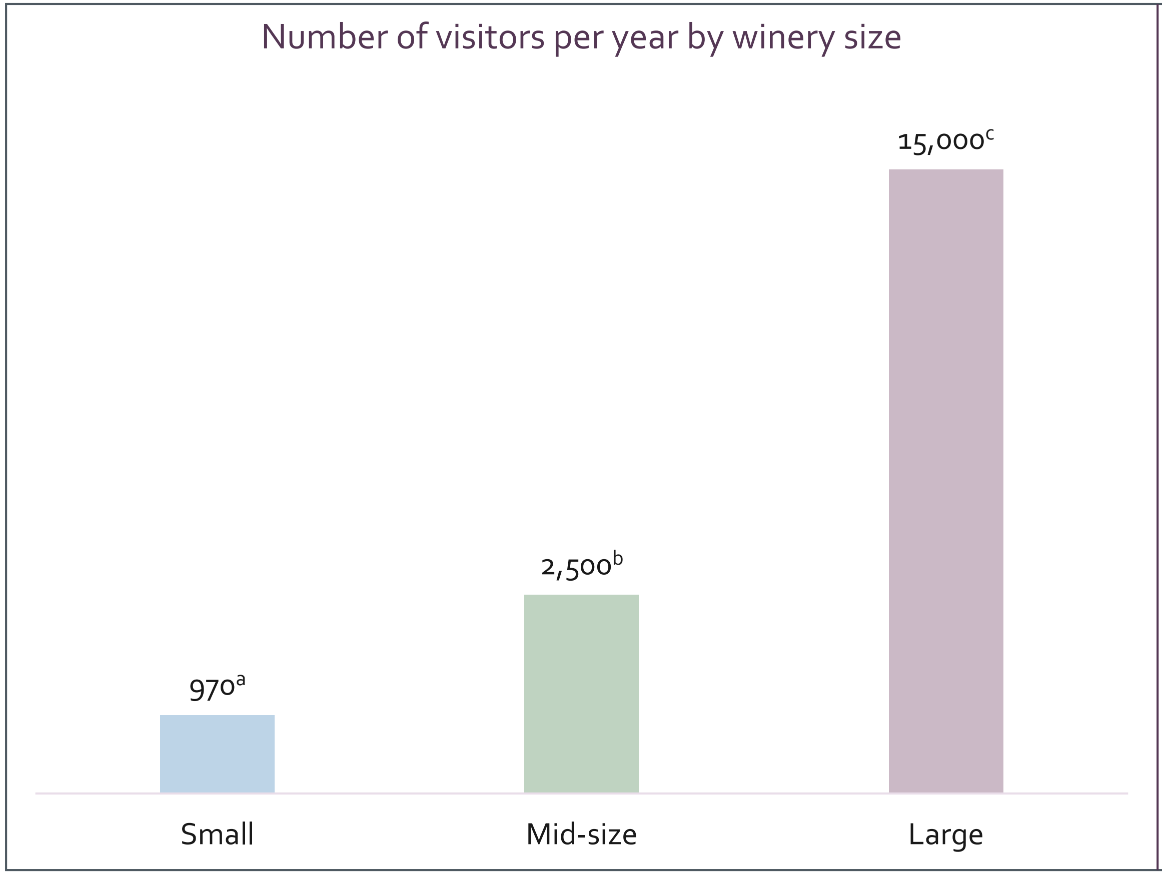


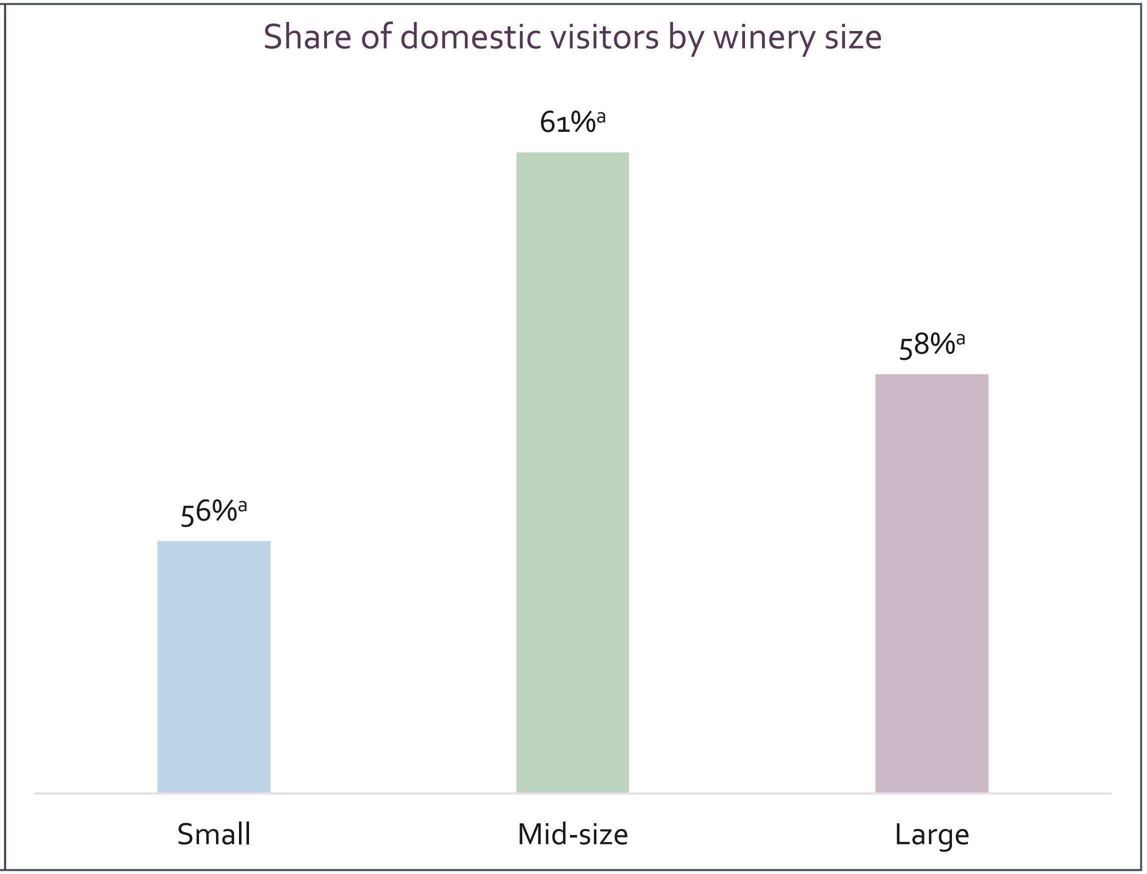
- European wineries reported a significantly lower average number of visitors per year (1,000) than those outside Europe (4,000) (p < 0,001).
- The share of domestic visitors is at the same level in both Europe and overseas.

* Lowercase superscript letters (a, b, c) indicate significant differences between the sub-groups.

Number of visitors per year and share of domestic visitors by winery size

(Only wineries with wine tourism; N=866; median in total; mean in %)



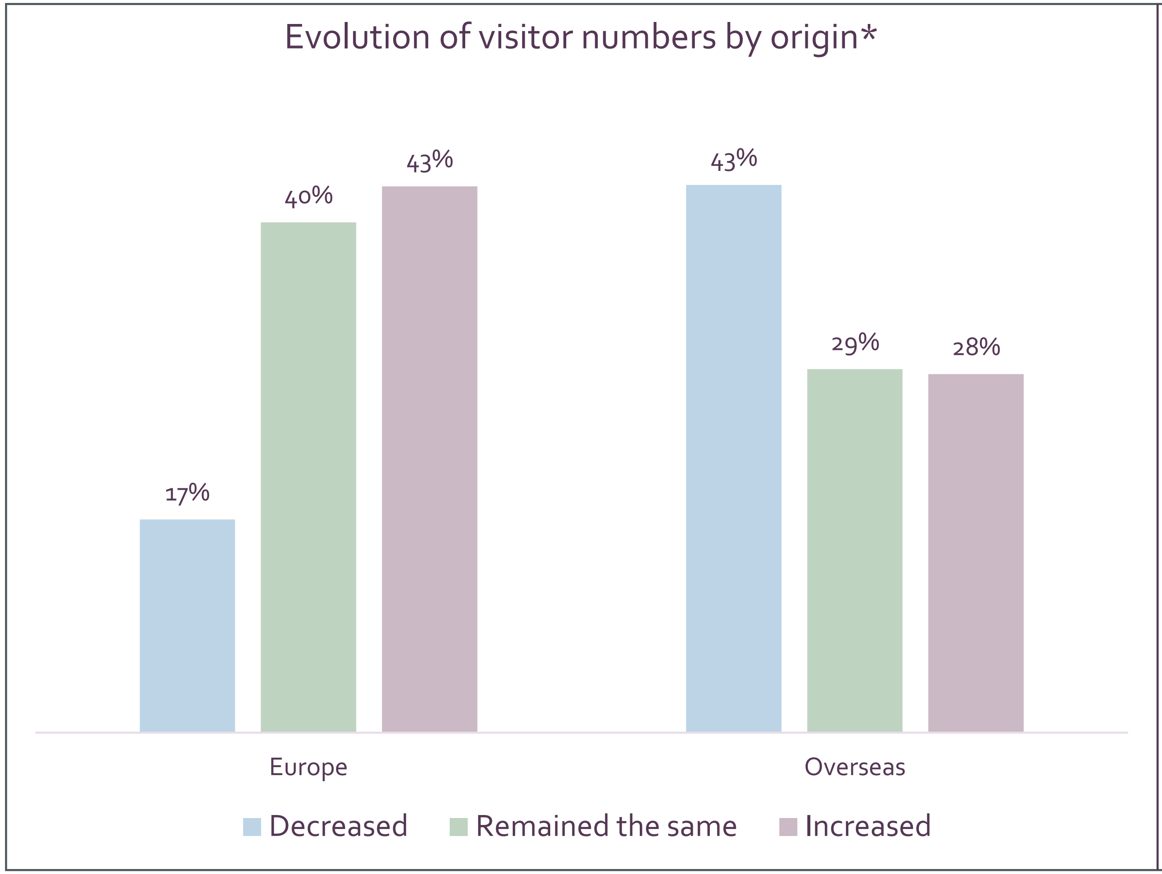


- Visitor numbers increase significantly with business size, ranging from 970 for small wineries to 15,000 for large ones (statistically significant).
- The proportion of domestic visitors remains relatively stable across all winery sizes, ranging between 56% and 61%.

* Lowercase superscript letters (a, b, c) indicate significant differences between the sub-groups.

Evolution of visitor numbers by origin and winery size over the past year

(Only wineries with wine tourism; N=1,149; in %)

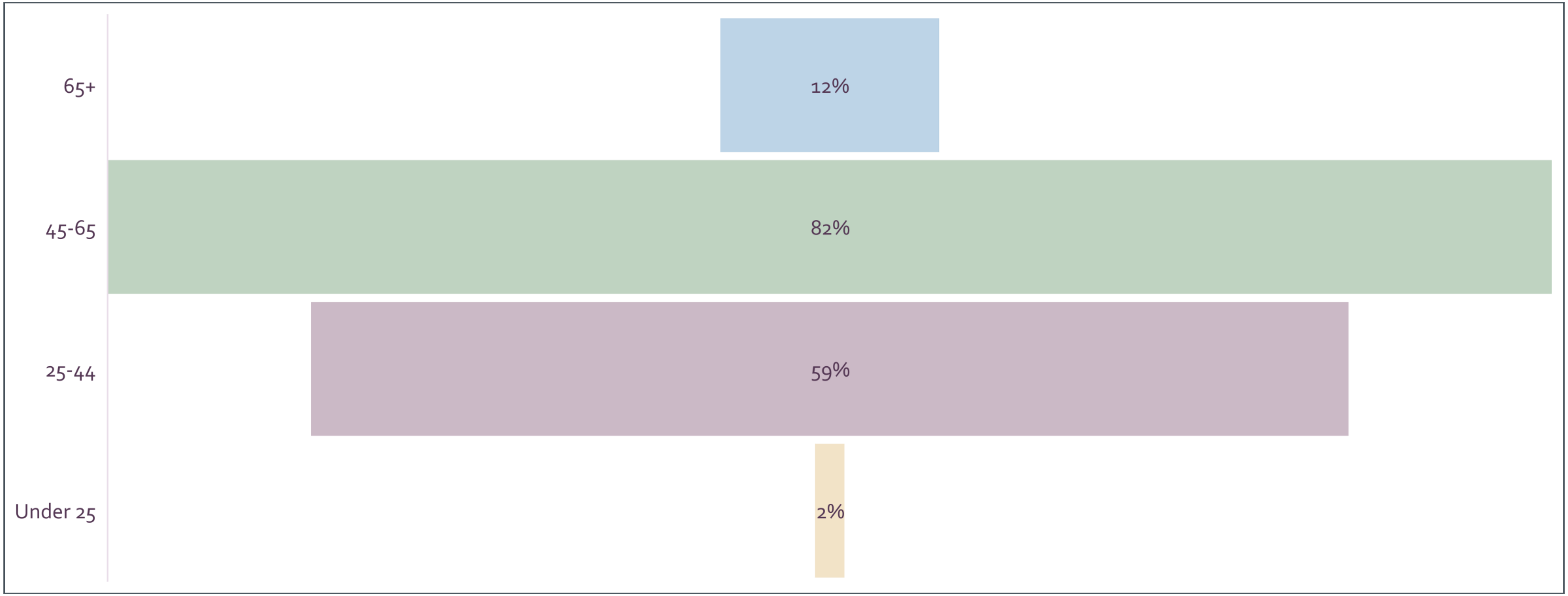


- Visitor number trends differ significantly between Europe and overseas regions ($p < 0.001$), with 43% of European wineries reporting an increase compared to only 28% overseas.
- In overseas regions, 43% of wineries experienced a decrease in visitor numbers, while only 17% of European wineries reported declines.
- Winery size does not significantly influence visitor number development ($p = 0.193$), although large wineries show the highest share of growth (46%).
- Across all winery size categories, around one-third of wineries reported stable visitor numbers, suggesting that stability is common regardless of scale.

* Significant differences between the subgroups.

Most represented age groups

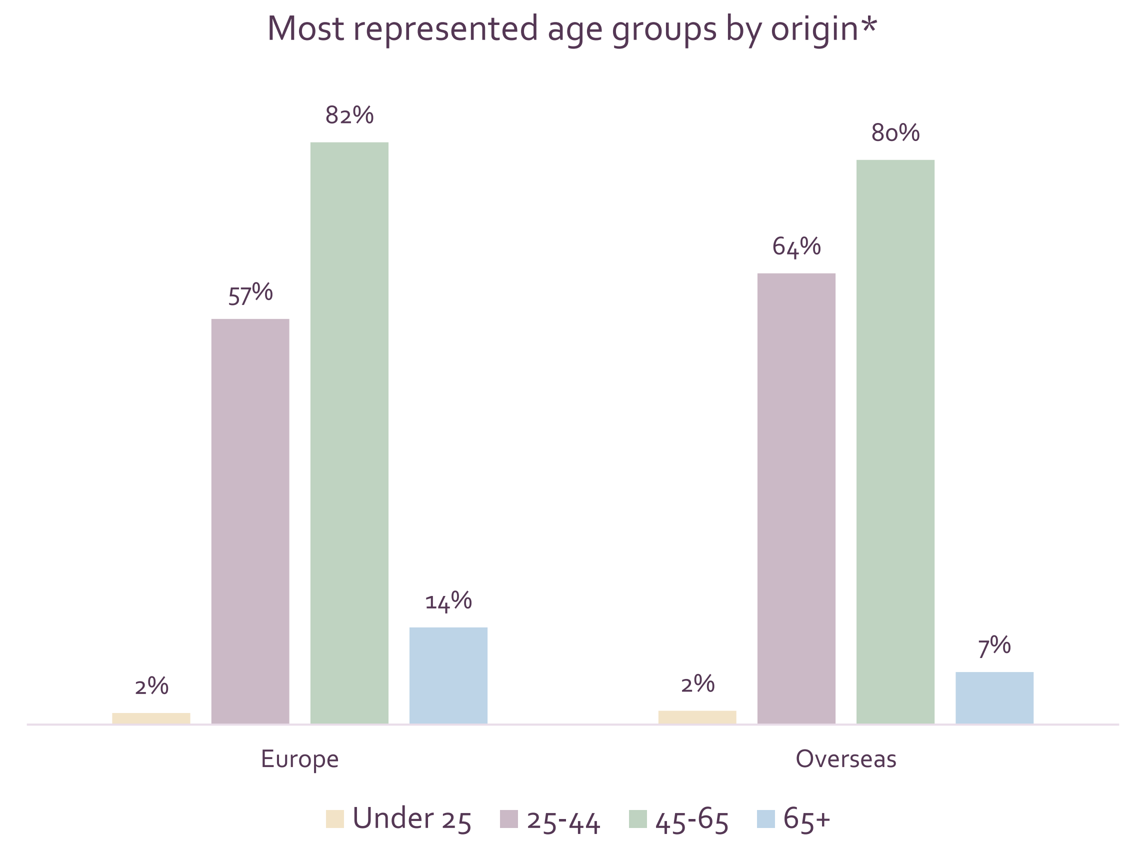
(Only wineries with wine tourism; N=1,149; multiple answers; in %)

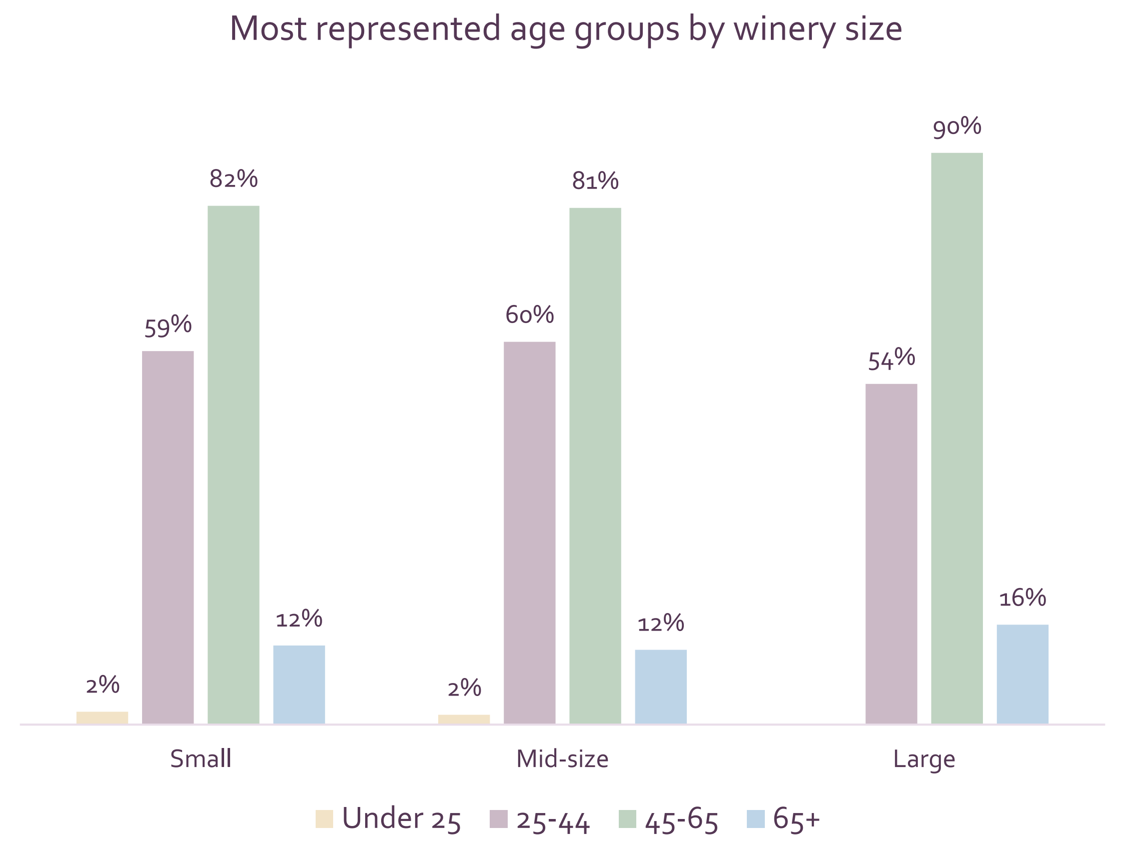


- The largest visitor segment is aged 45–65, reported by 82% of wineries.
- Visitors aged 25–44 make up the second-largest segment, reported by 59% of wineries.
- Seniors aged 65+ are notably less represented, 12% of wineries noting this group.
- Young adults under 25 are the least represented, with only 2% of wineries reporting their presence.

Most represented age groups by origin and winery size

(Only wineries with wine tourism; N=1,149; multiple answers; in %)



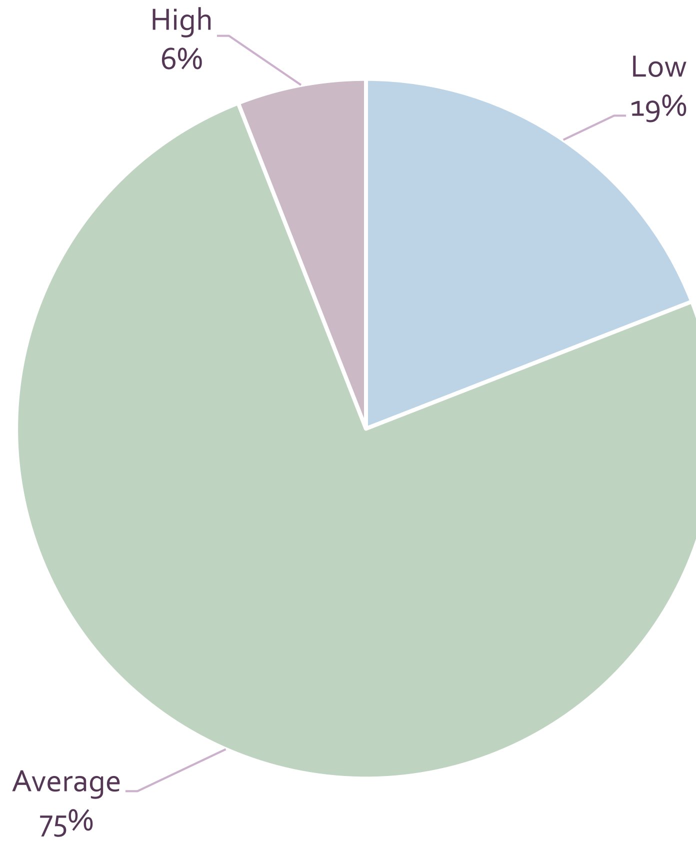


- Visitors aged 45–65 form the dominant age group across all regions and winery sizes, peaking at 90% in large wineries and over 80% in both Europe and overseas.
- The 25–44 age group is more represented overseas (64%) than in Europe (57%), with this regional difference being statistically significant ($p < 0.05$).
- Visitors aged 65 and older make up a larger share in Europe and at large wineries, indicating that older clientele tend to prefer more established or better-equipped wineries.
- Visitors under 25 remain a very small segment across all groups (only 2%), highlighting a clear challenge in in attracting younger generations to wine tourism.

* Significant differences between the subgroups.

Average level of wine knowledge

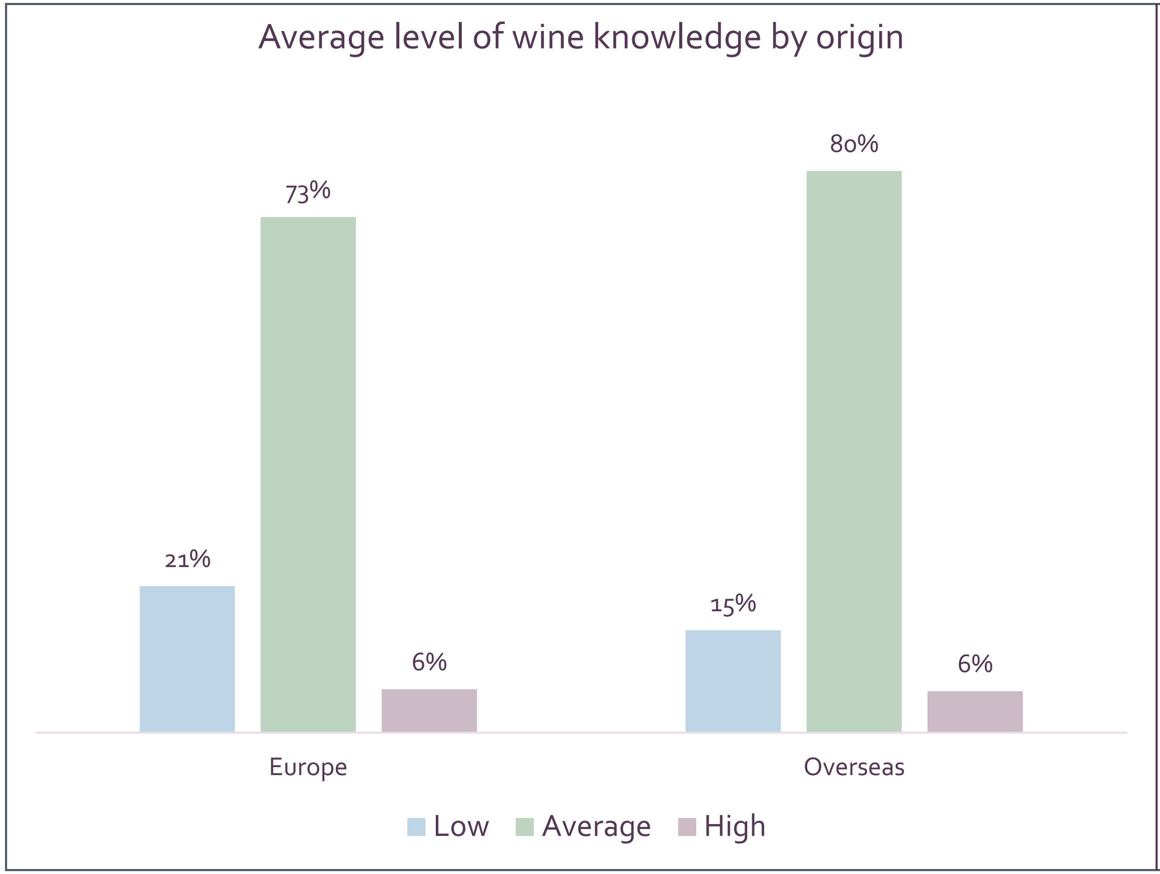
(Only wineries with wine tourism; N=1,149; in %)



- The majority of visitors (75%) have an average level of wine knowledge.
- Only 6% of guests possess a high level of wine competence, while 19% have low knowledge.

Average level of wine knowledge by origin and winery size

(Only wineries with wine tourism; N=1,149; in %)



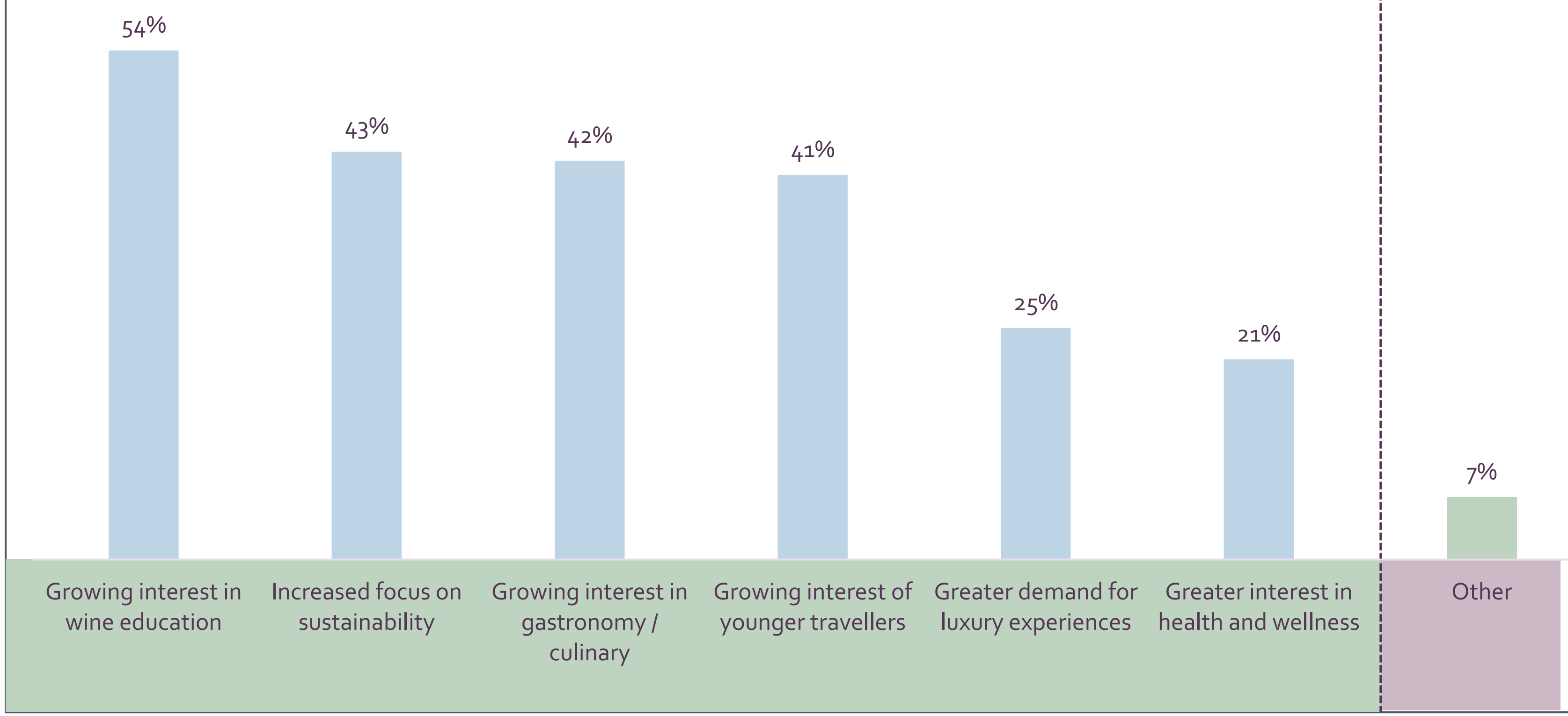
- The majority of visitors across all regions demonstrate medium wine knowledge, with 80% among overseas visitors and 73% among European visitors.
- A slightly higher share of low-knowledge visitors is observed in European wineries (21%) compared to overseas (15%), though this difference is not statistically significant (p = 0.077).
- A significant association exists between wine knowledge and winery size (p = 0.021).
- The share of low-knowledge visitors decreases with winery size (22% in small vs. 14% in large), while the proportion of medium knowledge increases accordingly (71% to 83%).

* Significant differences between the subgroups.

Change of profile of wine tourists

(Only wineries with wine tourism; N=1,149; in %)

Profile change of visitors – Response categories



Open answer – Other

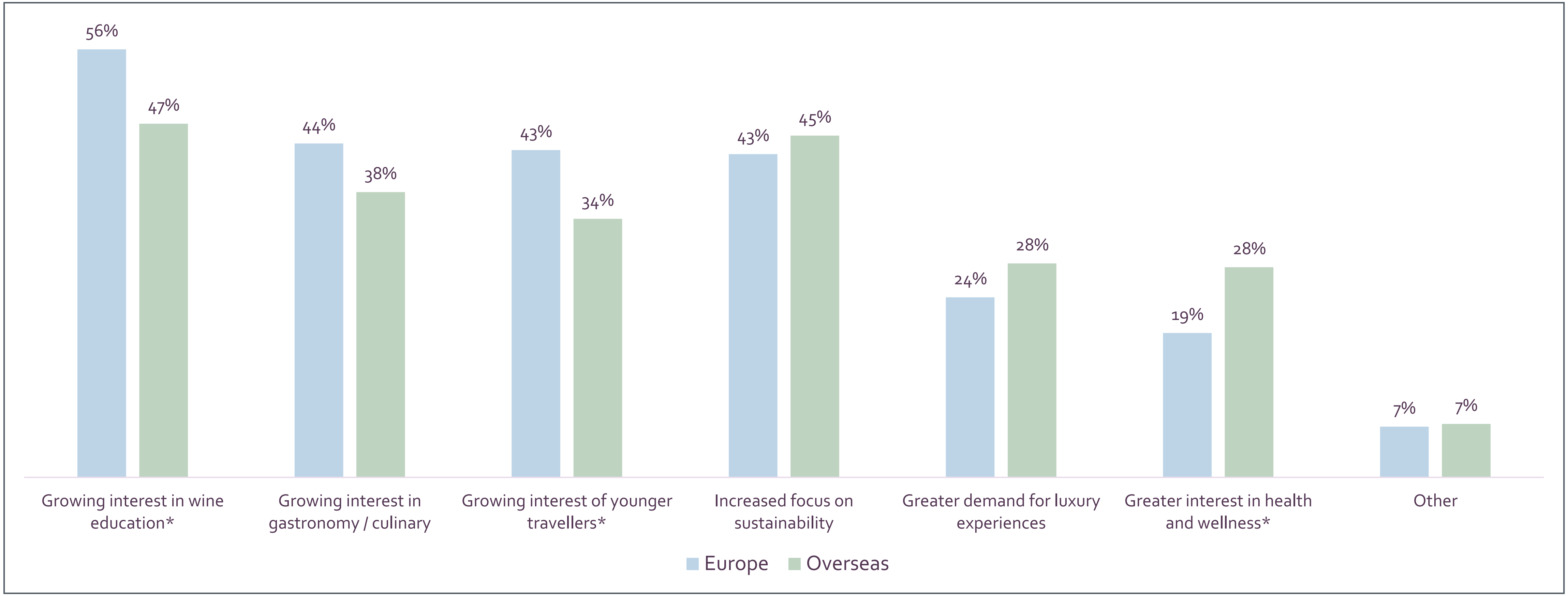
(Most mentioned; ordered by frequency of mention)

- Local varieties, terroir wines, tradition
- Fun experience, entertainment, events
- Less wine-focused, general tourists
- Wine-food pairing, gastronomic offerings
- Lower purchasing volumes, preference for lower-priced options, and limited willingness to pay
- Sustainability, green tourism, innovative experiences
- Increasing presence of younger visitors, families, and those traveling with children
- Personalized experiences, exclusive tours, small groups

- Wine education emerges as the leading trend, cited by 54% of respondents.
- Sustainability (43%) and culinary experiences (42%) are nearly equally important for visitors.
- Interest from younger travellers is notable at 41%, showing a demographic shift.
- Luxury (25%) and wellness (21%) play a smaller role, while only 7% mentioned other trends.

Change of profile of wine tourists by origin

(Only wineries with wine tourism; N=1,149; in %)

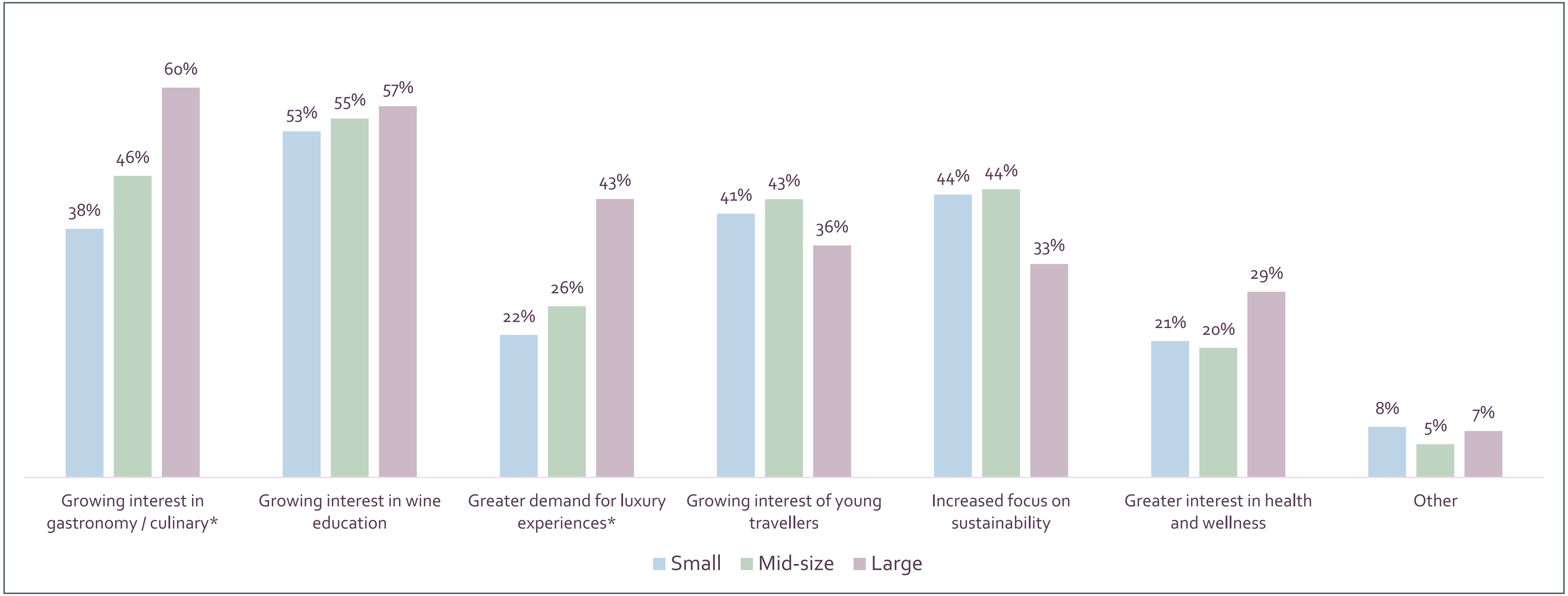


- European wineries report a higher increase in interest in wine education (56%) compared to overseas wineries (47%) ($p < 0.05$).
- Overseas wineries see a significantly stronger shift toward health and wellness interest (28% vs. 19%) ($p < 0.005$).
- Interest in sustainability and gastronomy shows similar levels across both regions, with slight variations.
- The interest of younger generations has grown significant more in Europe (43%) than overseas (34%) ($p < 0.05$).

* Significant differences between the subgroups.

Change of profile of wine tourists by winery size

(Only wineries with wine tourism; N=1,149; in %)



- Larger wineries show a significantly higher shift toward luxury experiences, with 43% selecting this trend compared to only 22% of small wineries ($p < 0.001$).
- The trend "growing interest in gastronomy / culinary" is significantly more prevalent among large wineries (60%) than small ones (38%) ($p < 0.001$).
- No significant difference was observed for sustainability or younger visitors across winery sizes ($p > 0.1$).
- Health and wellness appears more relevant for large wineries (29%) than others, but this difference is not statistically significant ($p = 0.264$).

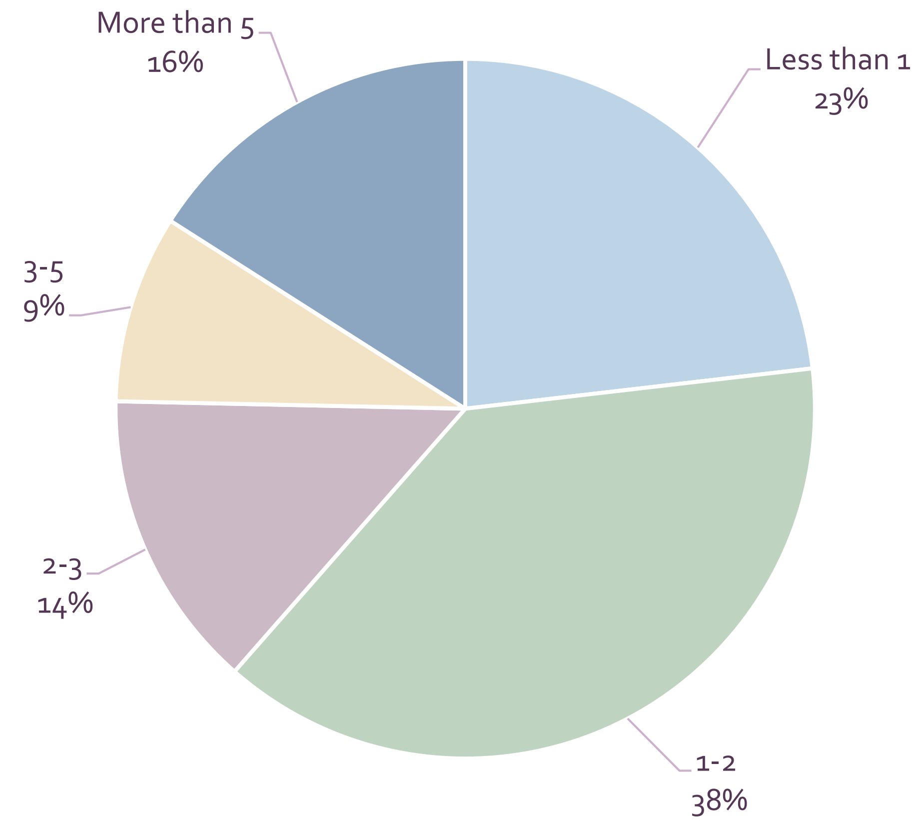
* Significant differences between the subgroups.

Chapter 4.6

Requirements for wine tourism

Number of full-time equivalent (FTE) jobs involved in WT

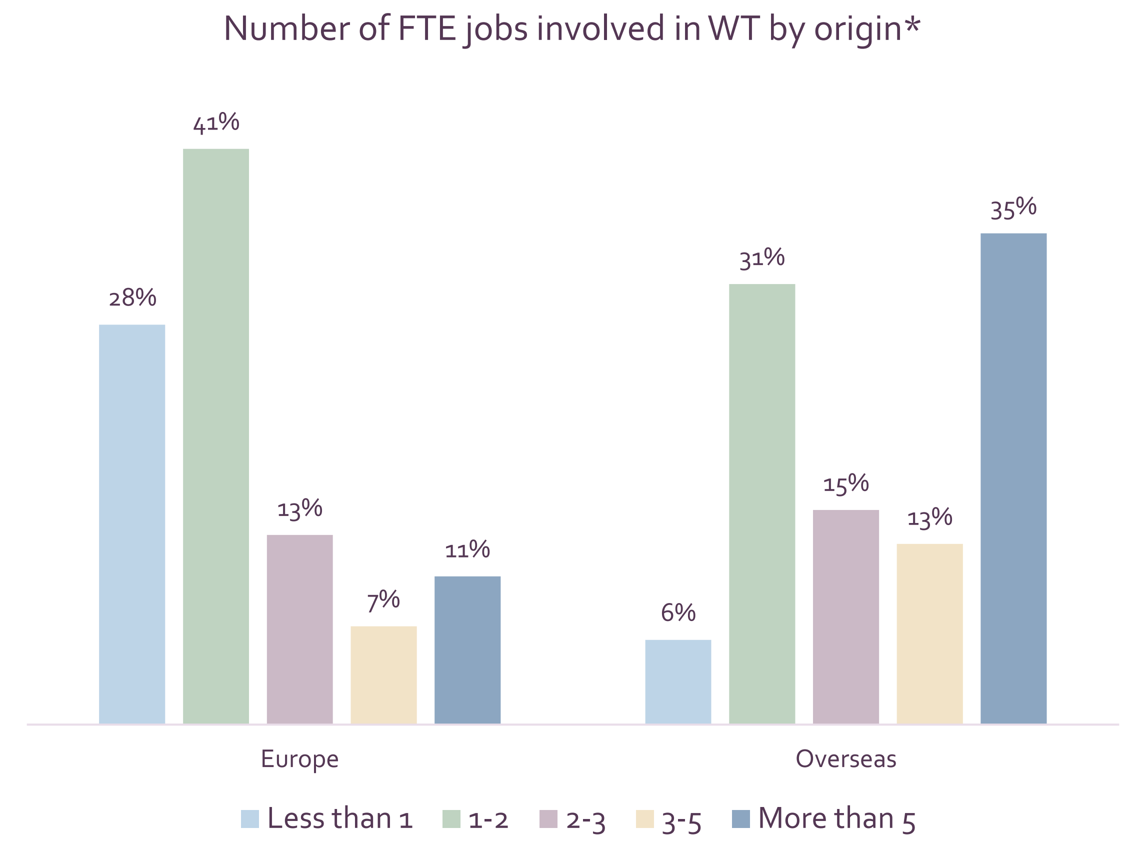
(Only wineries with wine tourism; N=1,149; in %)

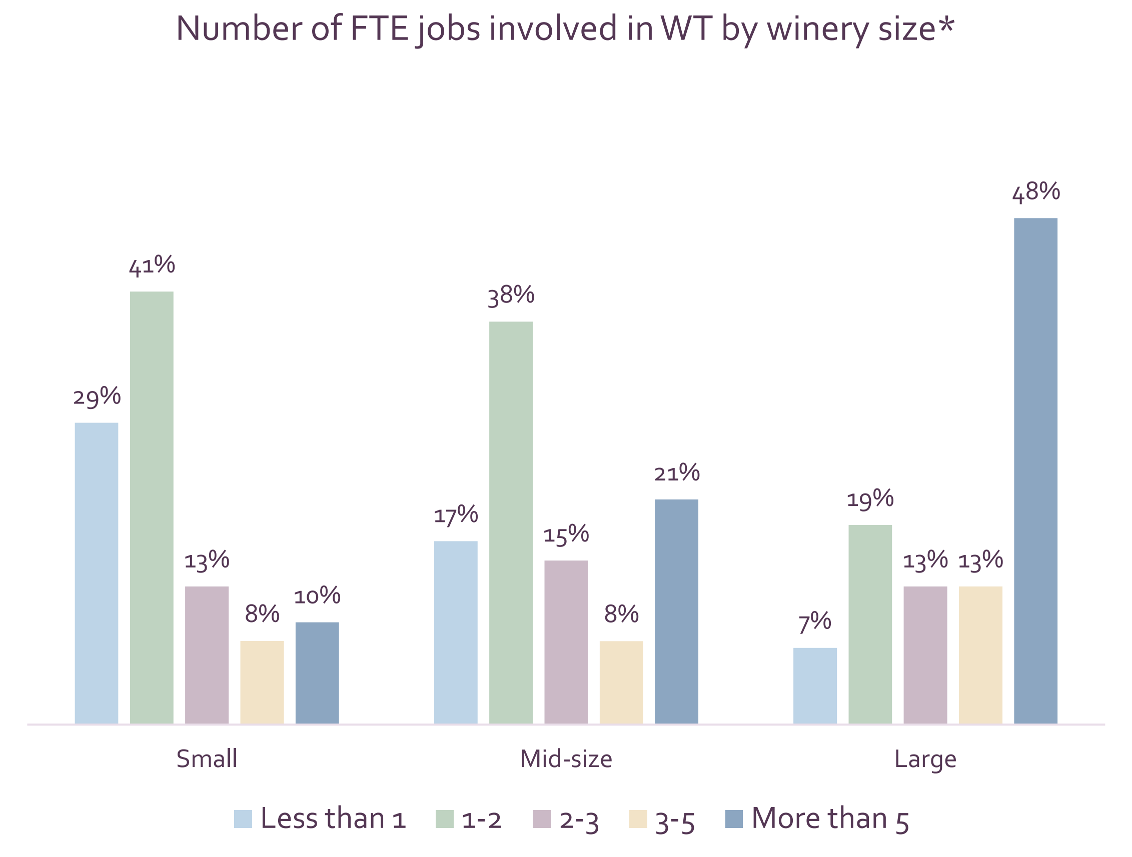


- 38% of wineries employ 1–2 full-time equivalents for wine tourism, making it the most common staffing level in the sector.
- The share of full-time equivalents jobs ≤ 2 is 61%.
- Only 16% of wineries have more than 5 FTEs, indicating that significant staffing dedicated to wine tourism remains relatively uncommon.

Number of FTE jobs involved in WT by origin and winery size

(Only wineries with wine tourism; N=1,149; in %)



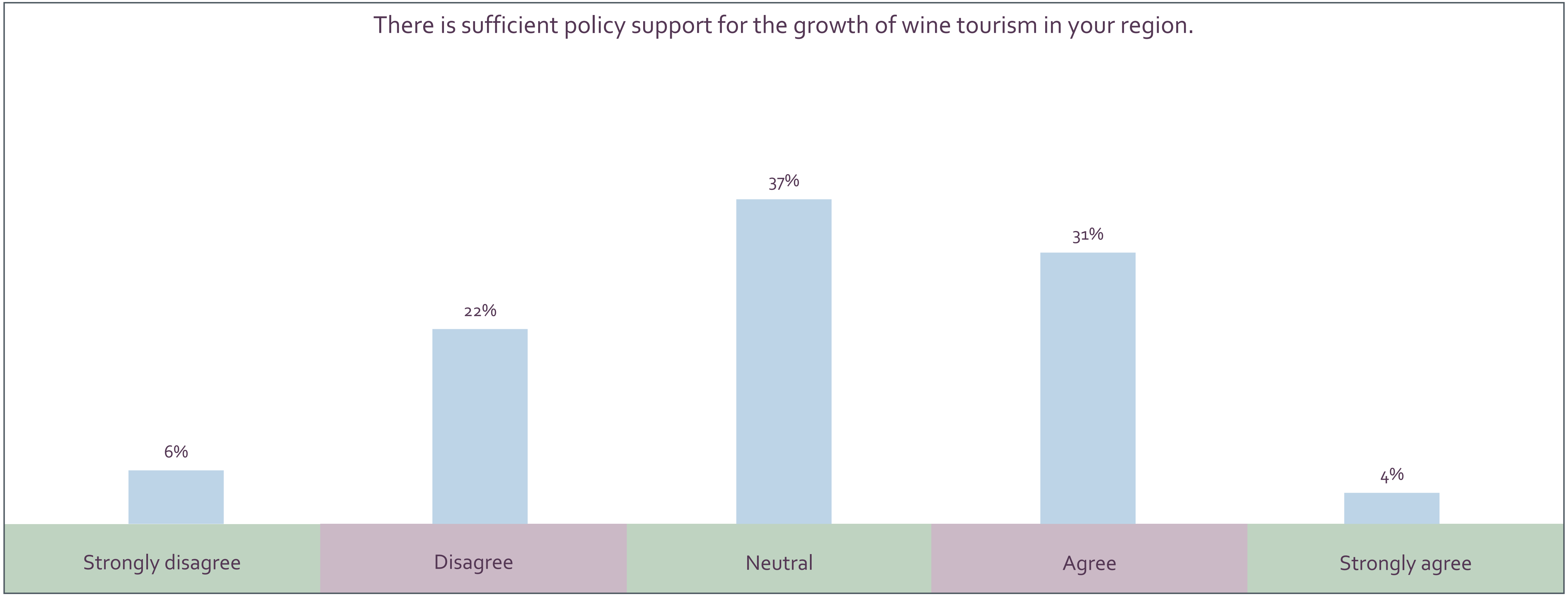


- Larger wineries and those located overseas are significantly more likely to employ larger full-time teams (more than 5 FTEs: 48% of large wineries; 35% of overseas wineries).
- Small wineries and those in Europe often operate with minimal staffing: 29% of small wineries and 28% of European ones report less than 1 FTE.
- The most common staffing level overall is 1–2 FTEs, especially among small and mid-size wineries in both regions.
- Chi-square tests confirm highly significant associations between both region and winery size with the number of FTEs ($p < 0.001$).

* Significant differences between the subgroups.

Policy support for growing wine tourism

(Only wineries with wine tourism; N=1,149; in %)



- A majority (over 70%) do not disagree that policy provides enough support: 37% are neutral, 31% agree, 4% strongly agree.
- Only 28% express disagreement, with 22% disagreeing and 6% strongly disagreeing.

Policy support for growing wine tourism by origin and winery size

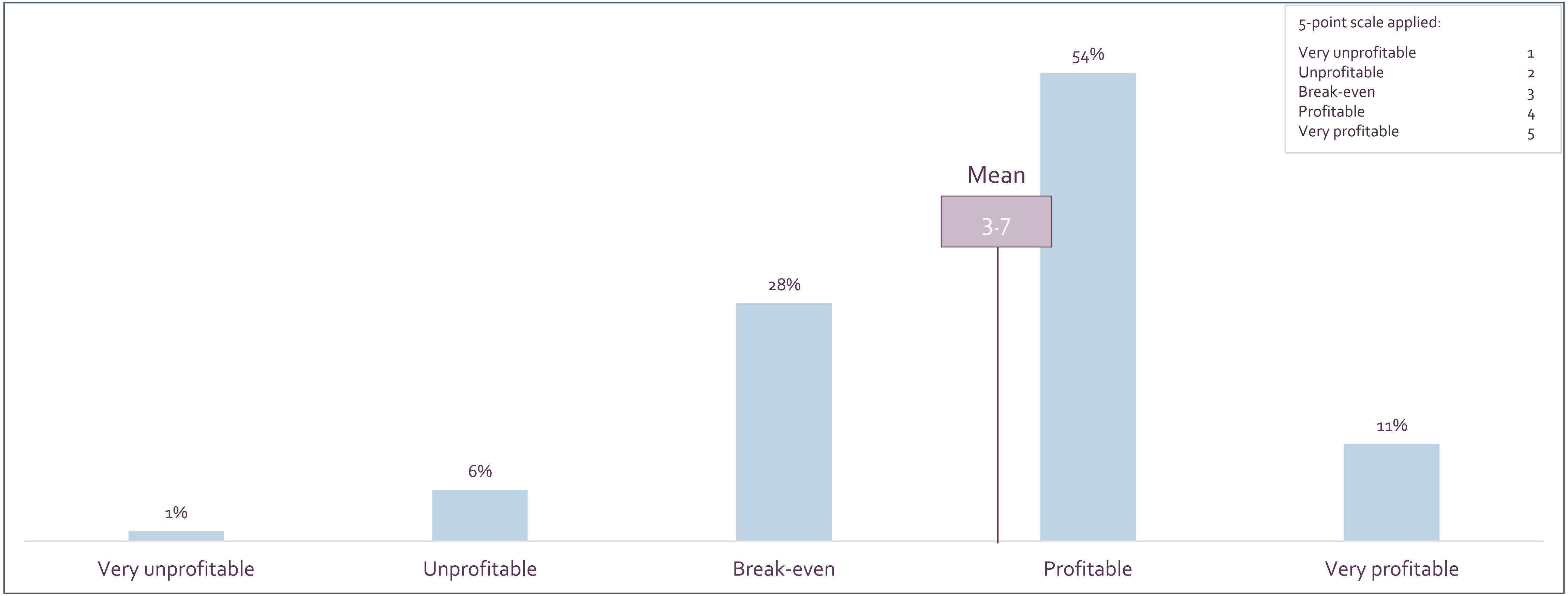
(Only wineries with wine tourism; N=1,149; mean on a 5-point scale)

- Overall mean rating is 3.04, indicating a neutral stance on whether local policy supports wine tourism.
- Non-European wineries rate slightly higher (3.14) than European ones (3.01), but the difference is not statistically significant (p = 0.068).
- Ratings vary slightly by winery size (3.01–3.14), but shows no significant difference (p = 0.532).

Chapter 4.7
Profitability of wine tourism

Profitability of wine tourism

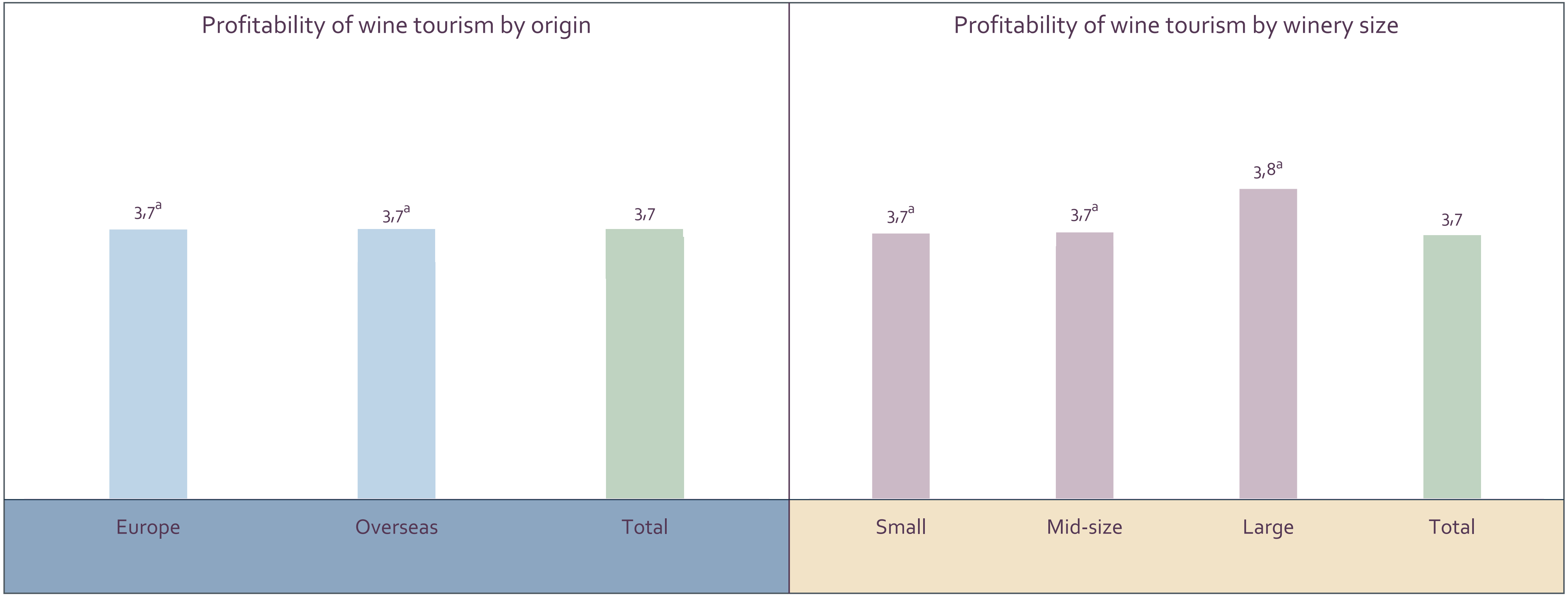
(Only wineries with wine tourism; N=1,149; in %)



- 65% of respondents consider wine tourism profitable or very profitable.
- 28% report it as break-even, suggesting limited but stable returns.
- Only 7% rate it as unprofitable or very unprofitable.
- Overall, the majority sees wine tourism as economically viable.

Profitability of wine tourism by origin and winery size

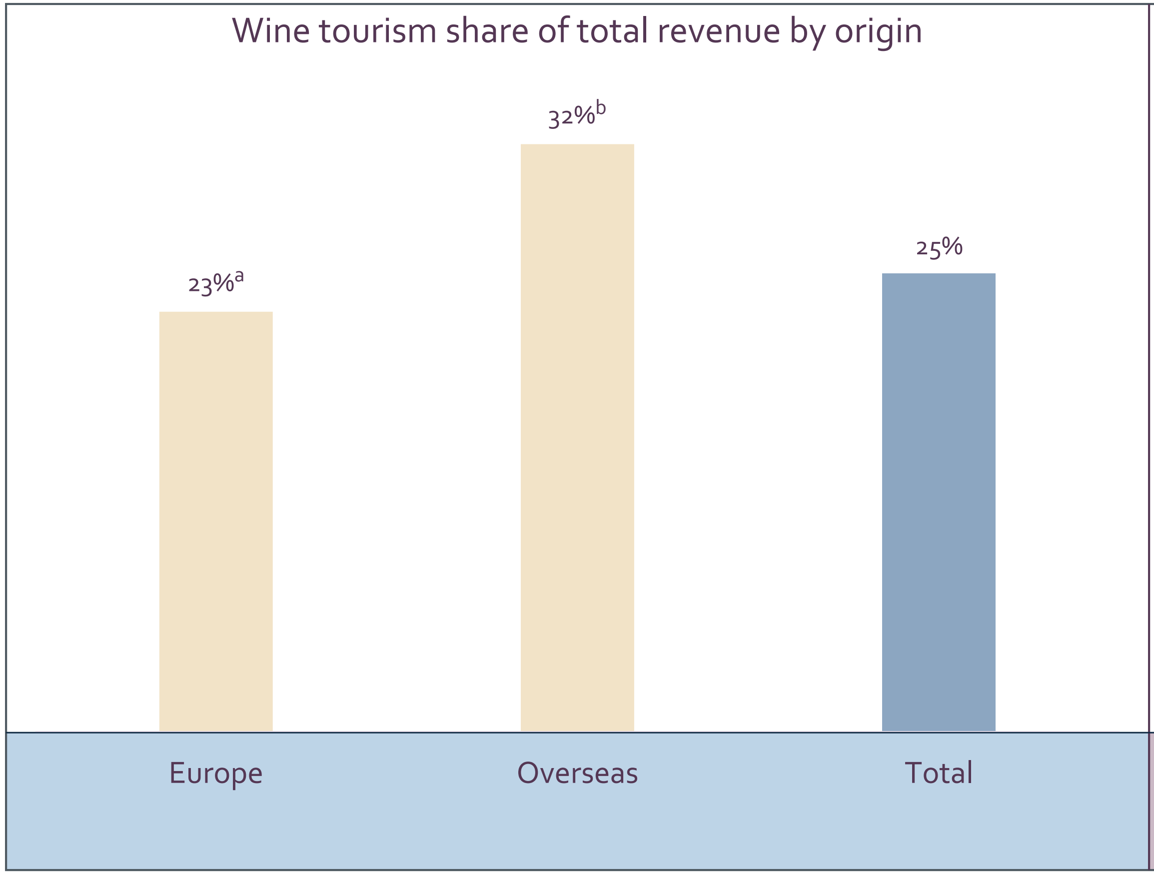
(Only wineries with wine tourism; N=1,149; mean on a 5-point scale)



- The overall mean profitability rating is 3.7, indicating moderate profitability.
- Profitability ratings are nearly identical across European and non-European wineries (both 3.7).
- Large wineries report the highest profitability (3.8), slightly above small and mid-size wineries (both 3.7).
- Differences by origin and size are minimal and not statistically significant.

Wine tourism share of total revenue

(Only wineries with wine tourism; N=1,149; in %)



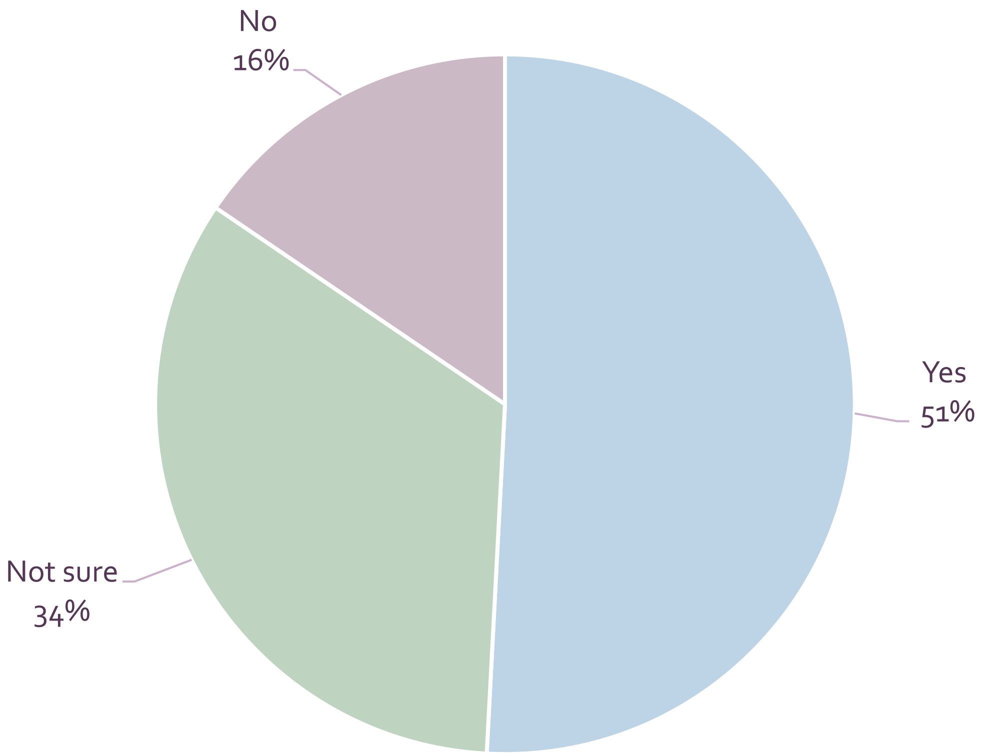
- Non-European wineries generate a significantly larger share of their total revenue from wine tourism (32%) than European ones (23%, $p < 0.001$).
- Smaller wineries report the highest share of wine tourism revenue (28%), followed by mid-sized (21%) and large wineries (17%, $p < 0.001$).
- The total average share of wine tourism in winery revenue is 25%.
- Significant differences exist both by region and winery size, suggesting structural and strategic contrasts.

* Lowercase superscript letters (a, b, c) indicate significant differences between the sub-groups.

Chapter 4.8
Future of wine tourism

Intention to invest in wine tourism

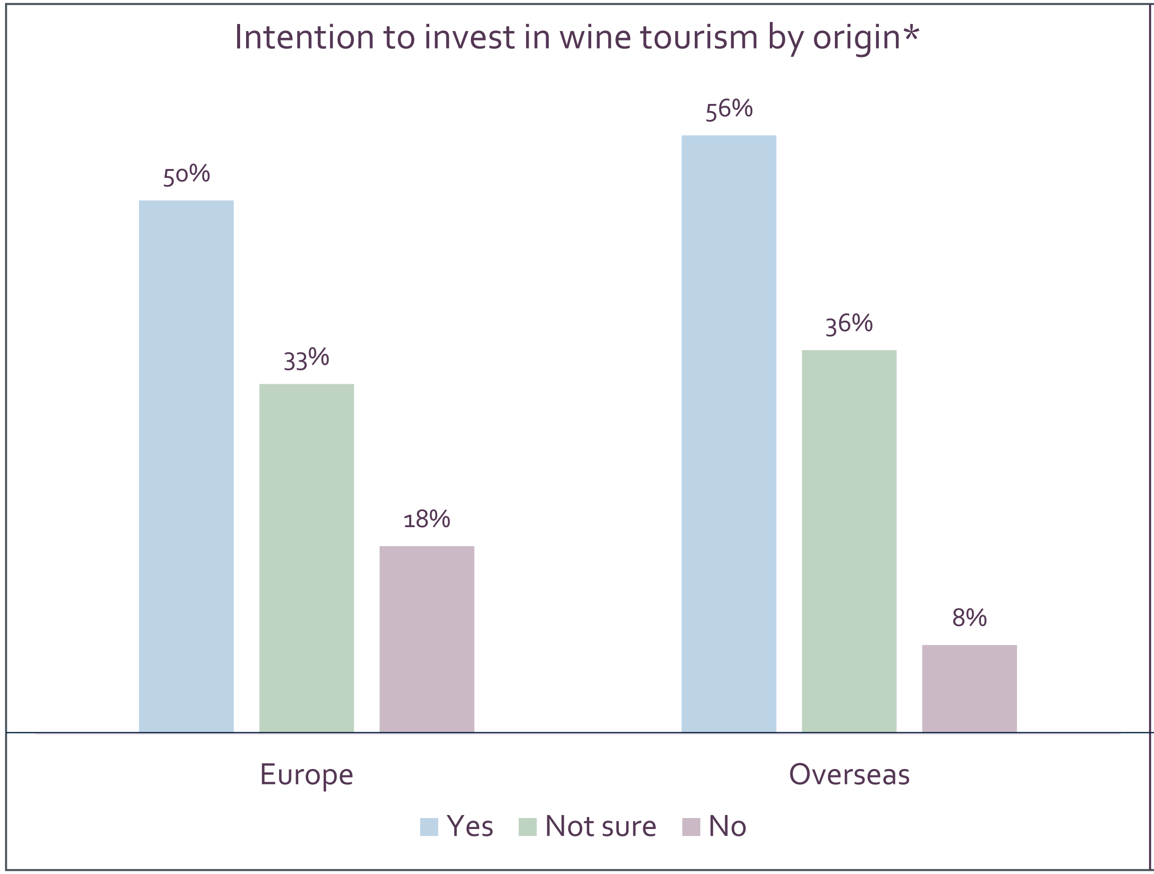
(Only wineries with wine tourism; N=1,149; in %)



- 51% of wineries intend to invest in wine tourism activities.
- 34% are uncertain, indicating a high level of hesitation or lack of planning.
- Only 16% clearly state no intention to invest.

Intention to invest in wine tourism by origin and winery size

(Only wineries with wine tourism; N=1,149; in %)



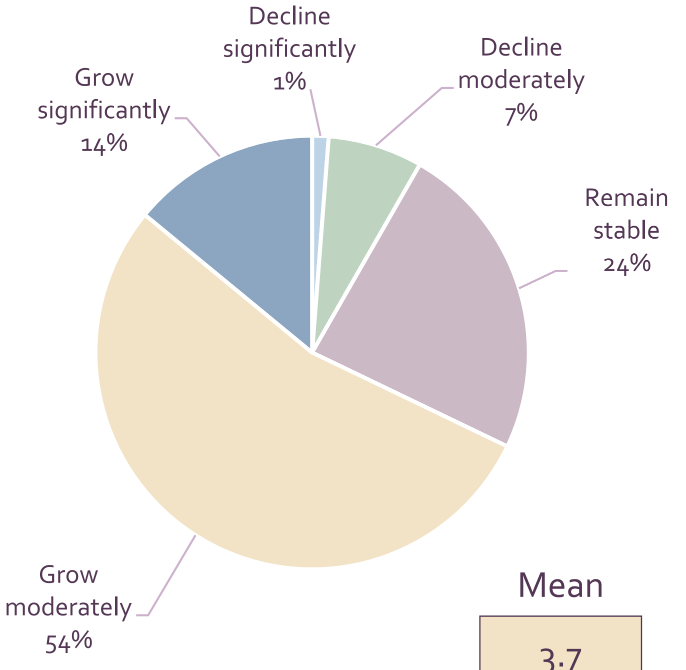
- Overseas wineries show significantly higher intention to invest (56%) than European ones (50%, p = 0.002).
- Larger wineries invest more (59%) than mid-size (50%) and small (51%), but differences are not significant (p = 0.203).

* Significant differences between the subgroups.

Future of wine tourism

(Only wineries with wine tourism; N=1,149; in %)

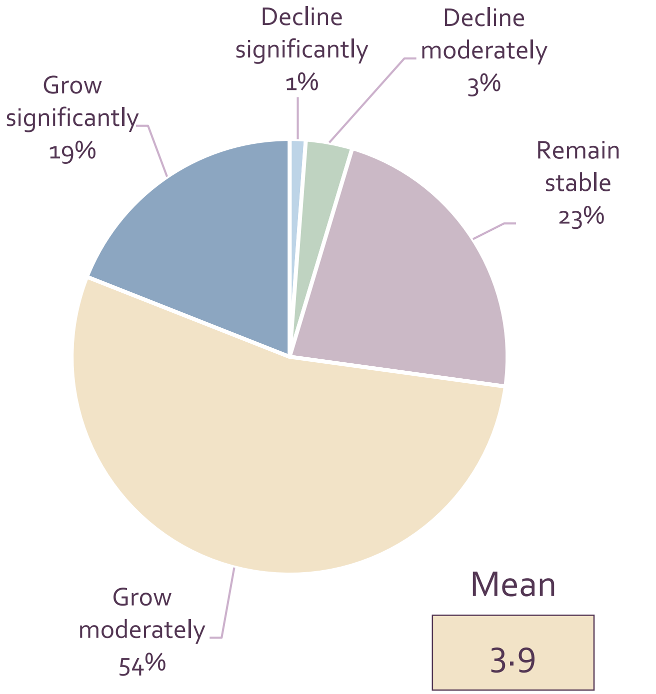
Future of wine tourism in the region



Mean

3.7

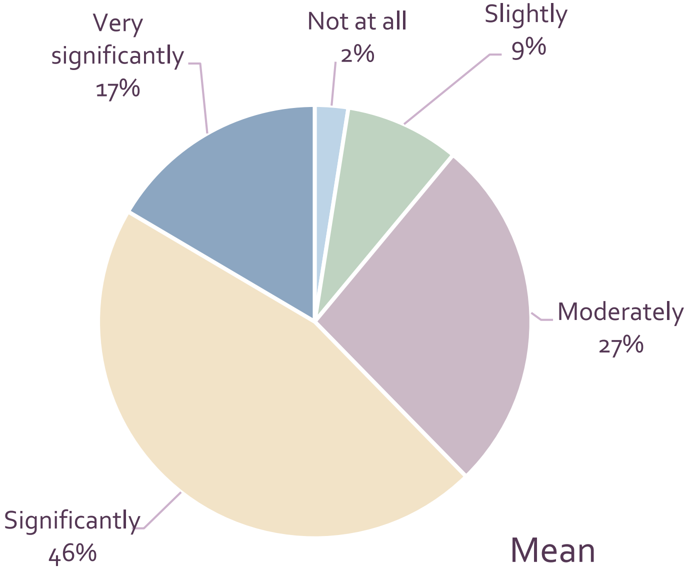
Future of wine tourism in the winery



Mean

3.9

Wine tourism can help in time of crisis



Mean

3.7

- 68% of the wineries believe that wine tourism will grow in the region.
- 73% of the wineries stated that their wine tourism activities will grow in the future.
- More than 60% of the wineries consider wine tourism a helpful tool in times of crisis.

5-point scale applied:

Decline significantly / Not at all	1
Decline moderately / Slightly	2
Remain stable / Moderately	3
Grow moderately / Significantly	4
Grow significantly / Very significantly	5

Future of wine tourism by origin

(Only wineries with wine tourism; N=1,149; mean on a 5-point scale)

- Respondents from Europe are slightly more optimistic about regional and winery wine tourism growth than those from overseas (means: 3.8 vs. 3.7 / 3.9 vs. 3.8).
- Regarding wine tourism as a crisis response, overseas wineries are clearly more confident than European ones (3.8 vs. 3.6).
- Statistical analysis reveals a significant difference in winery-specific expectations between world regions ($p = 0.035$).
- Differences in regional outlook and crisis-related confidence are statistically significant too ($p = 0.049$ / $p = 0.042$).

* Lowercase superscript letters (a, b, c) indicate significant differences between the sub-groups.

Future of wine tourism by winery size

(Only wineries with wine tourism; N=1,149; mean on a 5-point scale)

- Mid-sized wineries show the highest optimism regarding future wine tourism development (mean ≈ 3.8–3.9).
- Small and large wineries consistently rate future expectations at around 3.7.
- Differences between winery sizes are minor; showing no statistically significant effect ($p > 0.05$).
- Regarding crisis resilience, wineries of all sizes report similar ratings, with mid-sized wineries rating slightly lower (mean = 3.6).

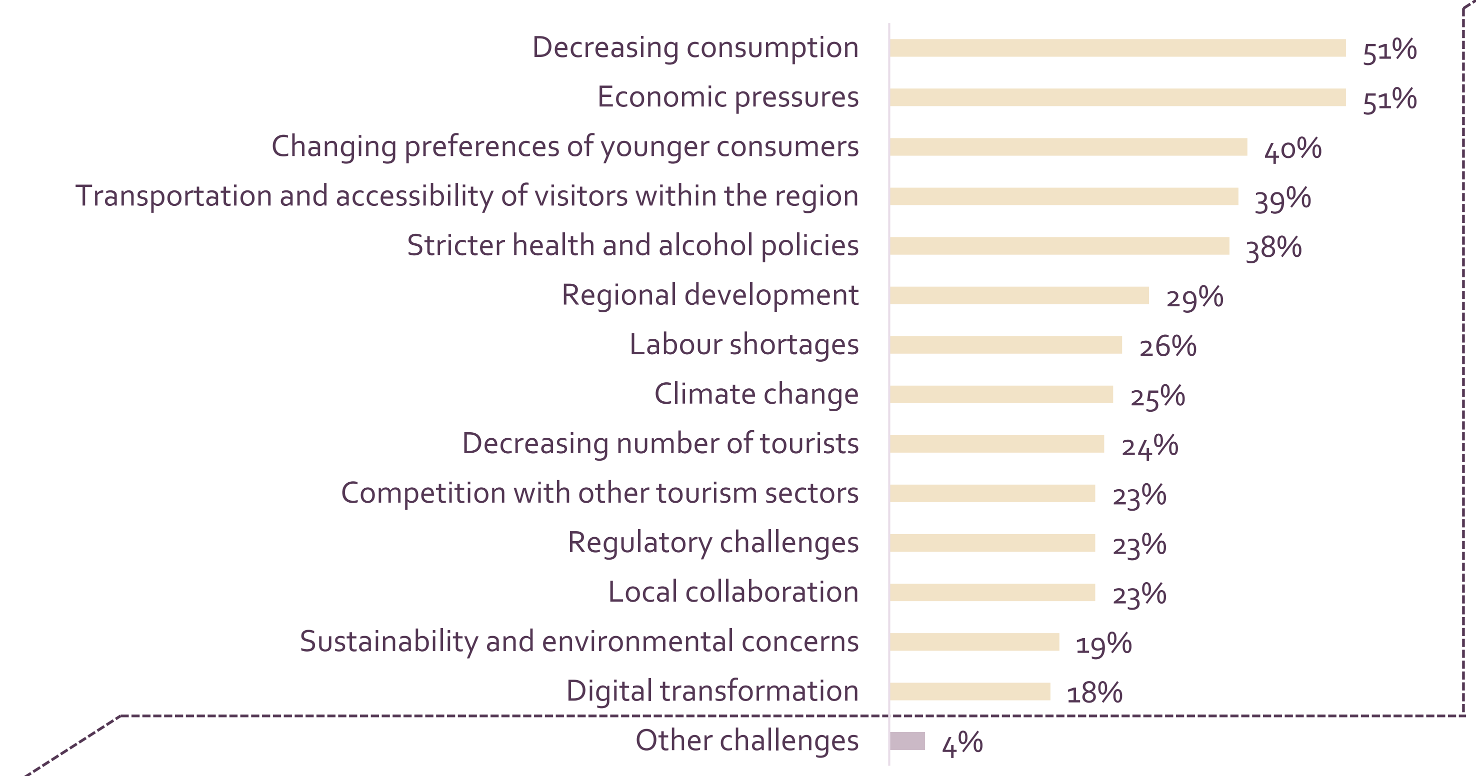
Chapter 4.9

Challenges for wine tourism

Challenges for wine tourism

(Only wineries with wine tourism; N=1,149; in %)

Challenges for wine tourism – Response categories



Open answer – Other

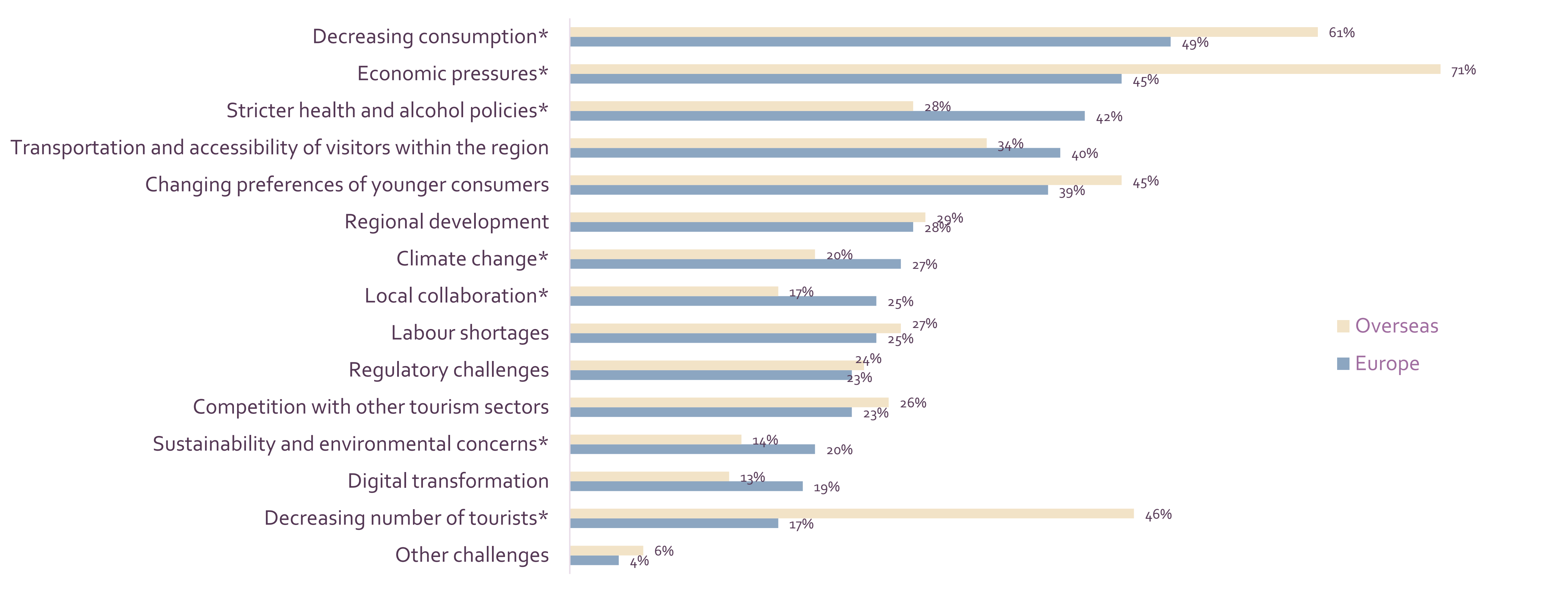
(Most mentioned; ordered by frequency of mention)

Category	Count
Economic conditions & purchasing power	10
Lack of infrastructure & facilities	8
Low demand & consumer behaviour	6
Lack of political & institutional support	5
Competition & market conditions	4
Political crises & unstable environments	4

- Economic pressures and decreasing consumption are the most cited challenges (51% each), indicating a fragile consumer market.
- Accessibility, regulations and health policies significantly hinder tourism activity (around 38–39%).
- Changing consumer preferences (40%) requires more adaptive and innovative wine tourism strategies.
- Labour shortages (26%) and digital transformation (18%) highlight internal operational constraints.

Challenges for wine tourism by origin

(Only wineries with wine tourism; N=1,149; in %)

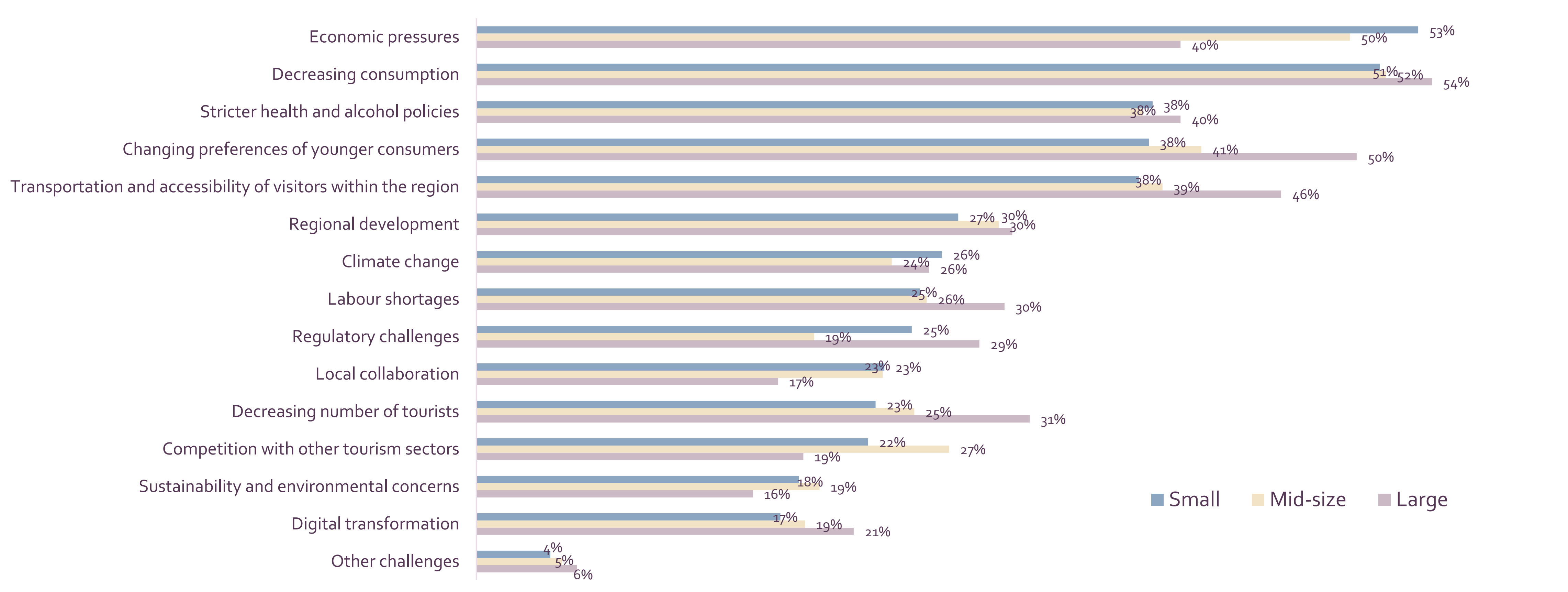


- Economic pressures (71%) and decreasing consumption (61%) are significantly more pressing overseas than in Europe (45% and 49% respectively).
- Transportation and accessibility (40%) and stricter health/alcohol policies (42%) are significantly more relevant in Europe than overseas (28% each).
- Changing preferences of younger consumers and decreasing number of tourists are significantly more relevant overseas (45% and 46% respectively) than in Europe (39% and 17% respectively).
- Europe emphasizes sustainability/environmental concerns (20%) and digital transformation (19%) more than overseas (14% and 13%), both significant.

* Significant differences between the subgroups.

Challenges for wine tourism by winery size

(Only wineries with wine tourism; N=1,149; in %)

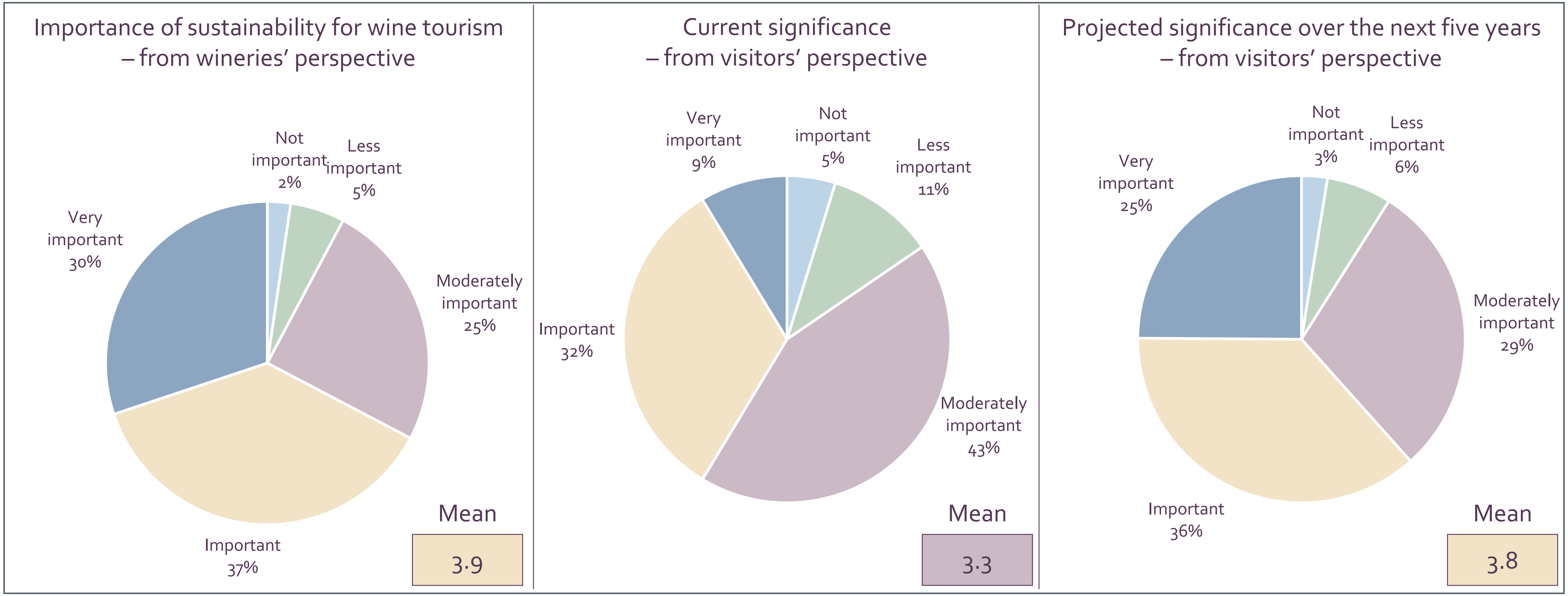


- Large wineries more frequently reported issues such as younger consumer preferences and decreasing tourist numbers than small or mid-sized ones.
- Small and mid-sized wineries were slightly more likely to mention economic pressures and competition with other tourism sectors.
- Small and mid-sized wineries are more concerned about sustainability and environmental challenges, however, the differences are not significant.
- No statistically significant correlations were found between winery size and the reported challenges ($p > 0.05$).

Chapter 4.10
Sustainability

Importance of sustainability

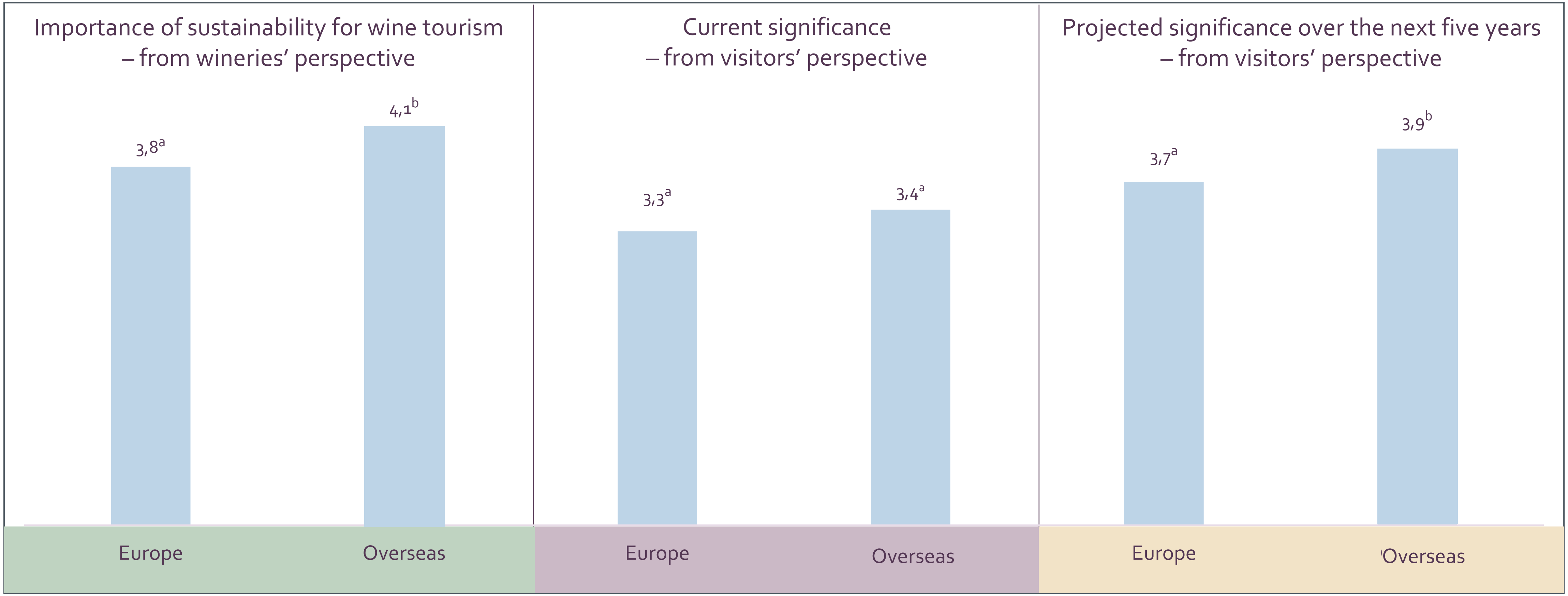
(Only wineries with wine tourism; N=1,149; in % , mean on a 5-point scale)



- Currently, sustainability is perceived as important or very important by 67% of respondents for their wine tourism business.
- When asked about the current general importance, only 41% rated it as important or very important.
- For the next five years, 61% expect sustainability to be important or very important, indicating rising future relevance.
- The data reflects a growing acknowledgment of sustainability's importance over the long term.

Importance of sustainability by origin

(Only wineries with wine tourism; N=1,149; mean on a 5-point scale)

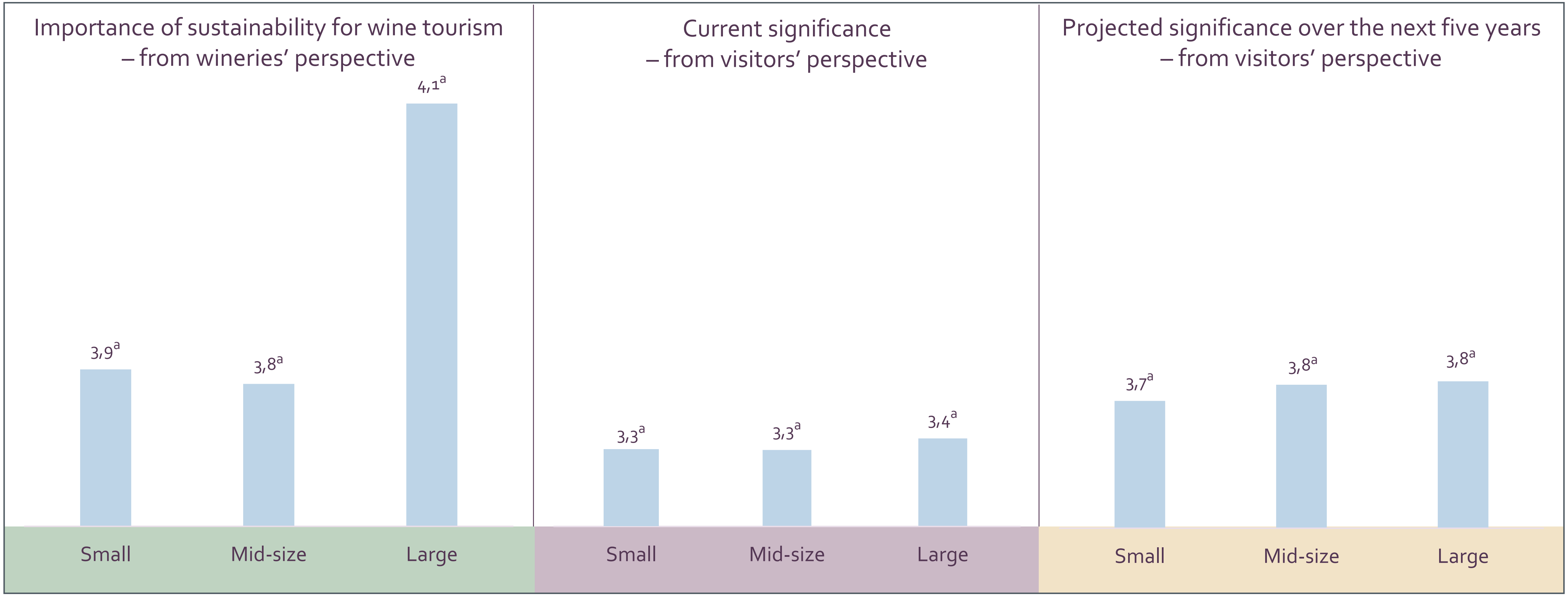


- Sustainability is rated significantly more important by non-European wineries (4.1) than by European ones (3.8; $p < 0.001$).
- In terms of visitors perception, there are no or only marginal differences between Europe and overseas.

* Lowercase superscript letters (a, b, c) indicate significant differences between the sub-groups.

Importance of sustainability by winery size

(Only wineries with wine tourism; N=1,149; mean on a 5-point scale)



- Large wineries rate sustainability higher (4.1), but this difference is not statistically significant ($p = 0.087$).
- The significance now and expectations for the next year are only slightly higher for larger wineries, with no significant differences between size categories ($p > 0.4$).
- Across all size groups, mean values for future visitor expectations are higher than for current wine tourism, indicating a general optimism.
- Overall, winery size shows no significant impact on sustainability rating or visitor development expectations.

Chapter 4.11
Trends in wine tourism

Trends in wine tourism

(Only wineries with wine tourism; N=1,149; in %)

Trends in wine tourism – Response categories

Open answer – Other

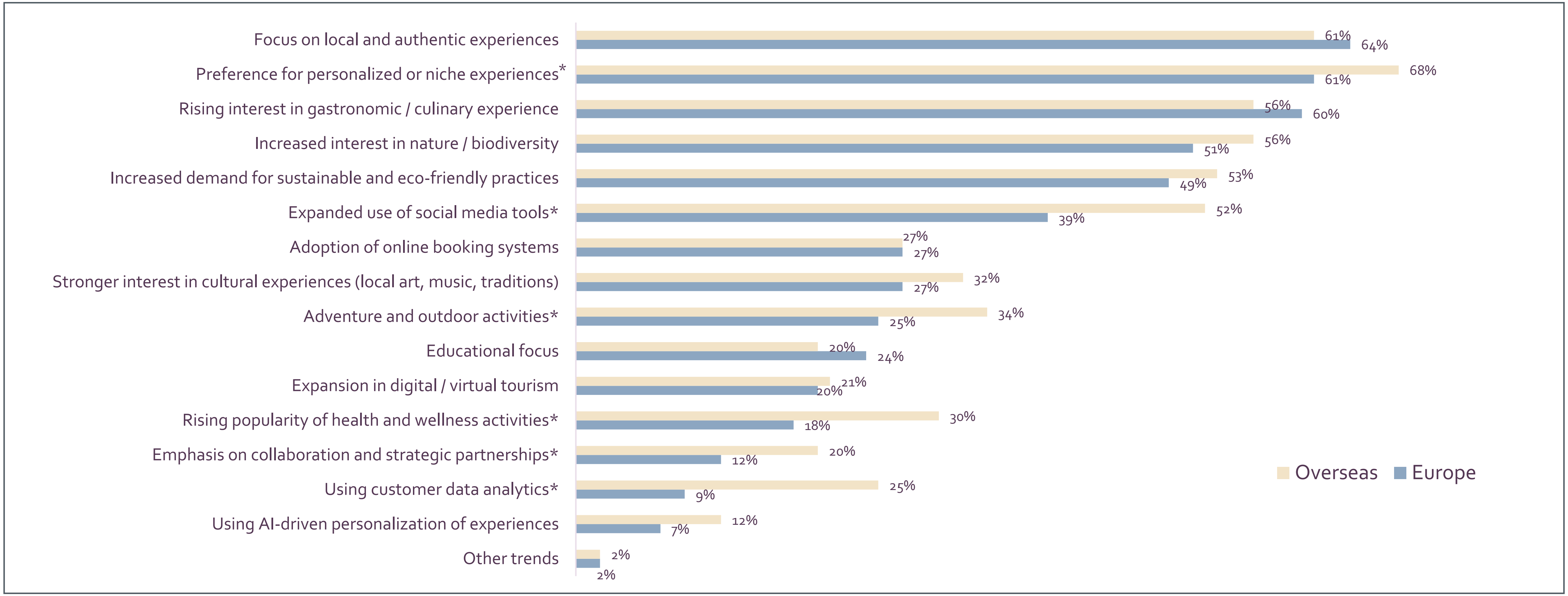
(Most mentioned; ordered by frequency of mention)

- Professionalized wine tourism management
- Price sensitivity and bargain-seeking
- Shift toward experiences over wine
- Increasing demand for authenticity and transparency
- Foreign and lower-income customer segments
- Attraction without conversion

- Local, authentic and niche experiences dominate wine tourism trends, with up to 63% prioritising these aspects.
- Growing interest in culinary experiences (59%) and stronger interest in cultural experiences (28%) also appear as important trends.
- Increased demand for sustainable and eco-friendly practices (50%), interest in nature and biodiversity (48%) and interest in adventure and outdoor activities (27%) underline clear trends among tourists.
- The rise of digital communication via social media (41%) and online booking systems (27%) reflects strong interest in positioning wineries in the global online market.

Trends in wine tourism by origin

(Only wineries with wine tourism; N=1,149; in %)

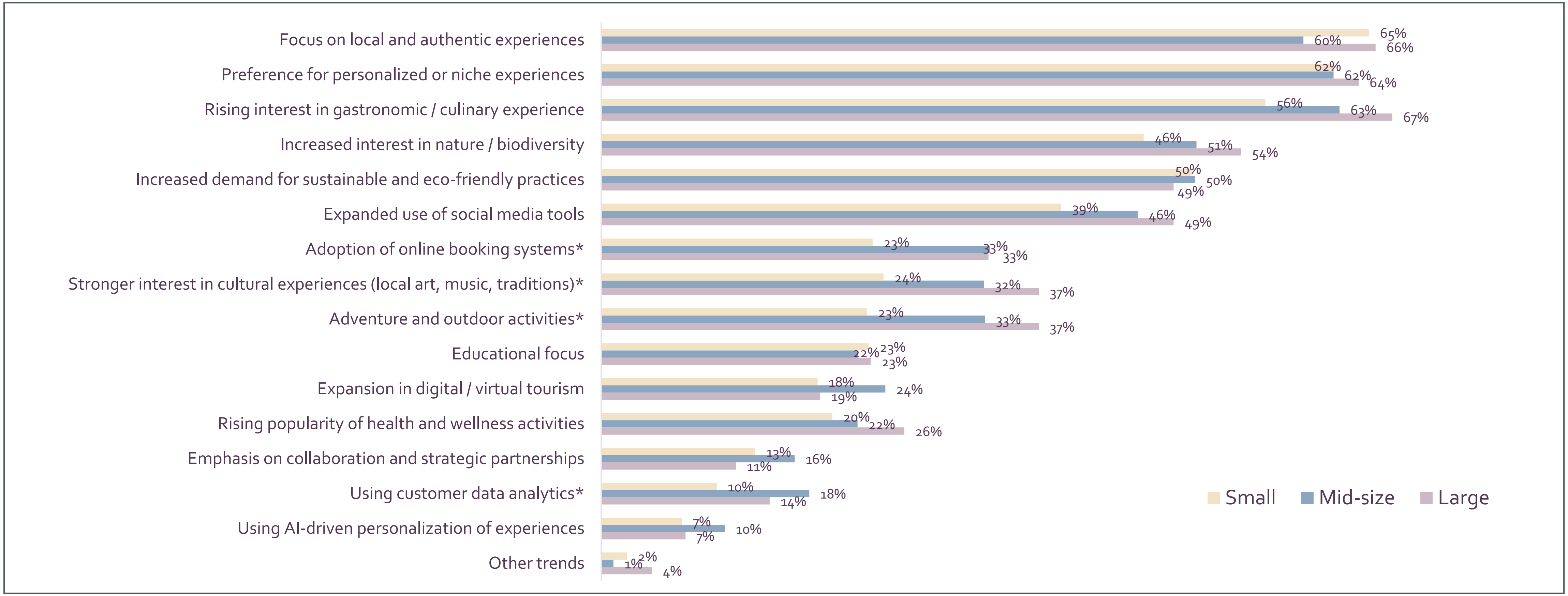


- Overseas respondents significantly more often emphasize personalized or niche experiences (Europe: 61 %, overseas: 68 %, p = 0.028).
- Overseas regions show a significantly stronger focus on health and wellness activities (30 % vs. 18 %, p < 0.001).
- Overseas providers significantly more often report the use of social media tools (52 % vs. 39 %, p < 0.001) and consumer data analytics (25% vs. 9%, p < 0.001).

* Significant differences between the subgroups.

Trends in wine tourism by winery size

(Only wineries with wine tourism; N=1,149; in %)



- Stronger interest in cultural experiences shows significant variation across winery sizes (p = 0.002), with larger wineries more engaged.
- Adventure and outdoor activities are significantly more emphasized by large and mid-size wineries (p < 0.001).
- Adoption of online booking systems is more frequent among mid-size and large wineries (p = 0.001).
- Using customer data analytics is significantly more common in mid-size wineries (p = 0.001).

* Significant differences between the subgroups.

Chapter 4.12
Innovation in wine tourism

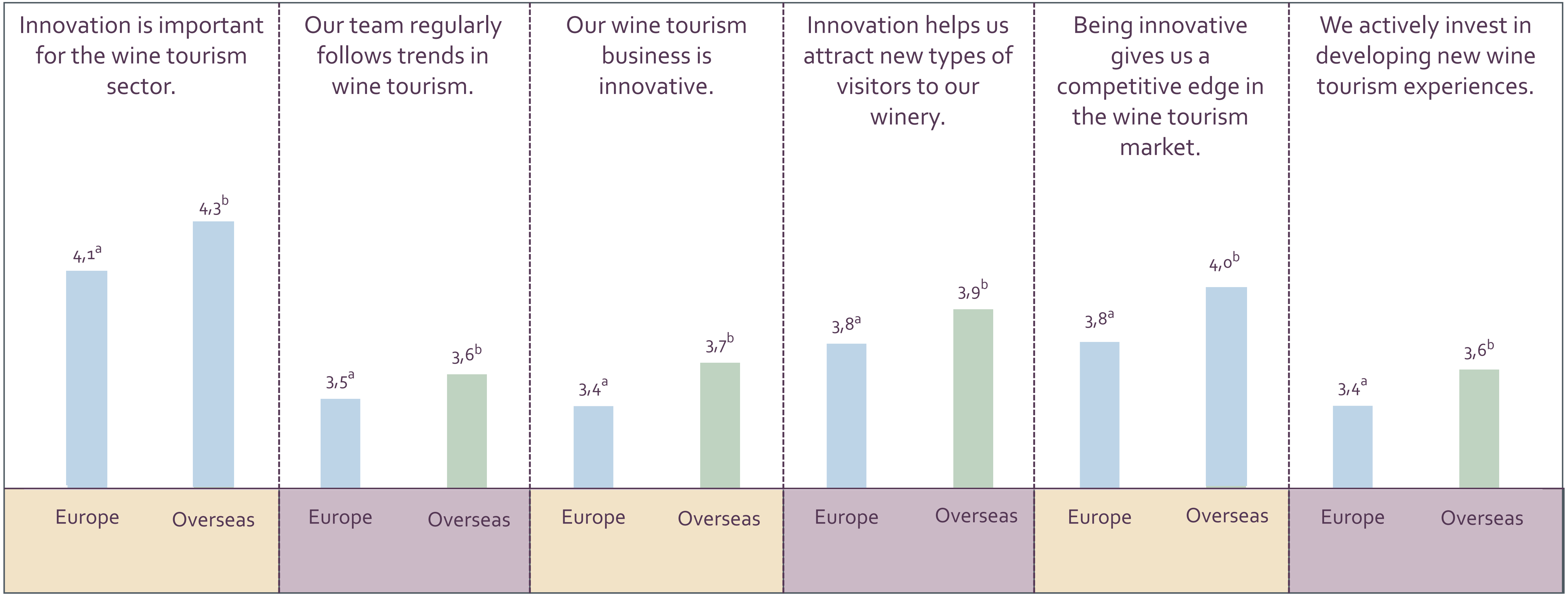
Statements on innovation in wine tourism

(Only wineries with wine tourism; N=1,149; mean on a 5-point scale)

- Innovation is broadly recognized as crucial for the wine tourism sector (4.1).
- Respondents agree that being innovative provides a competitive advantage (3.9) and helps attract new visitor segments (3.8).
- Actual investment in developing new wine tourism experiences remains moderate (3.5), indicating a gap between attitude and action.
- Similarly, the perception of one's own wine tourism offer as innovative and trend-aware is moderate (3.5).

Statements on innovation in wine tourism by origin

(Only wineries with wine tourism; N=1,149; mean on a 5-point scale)

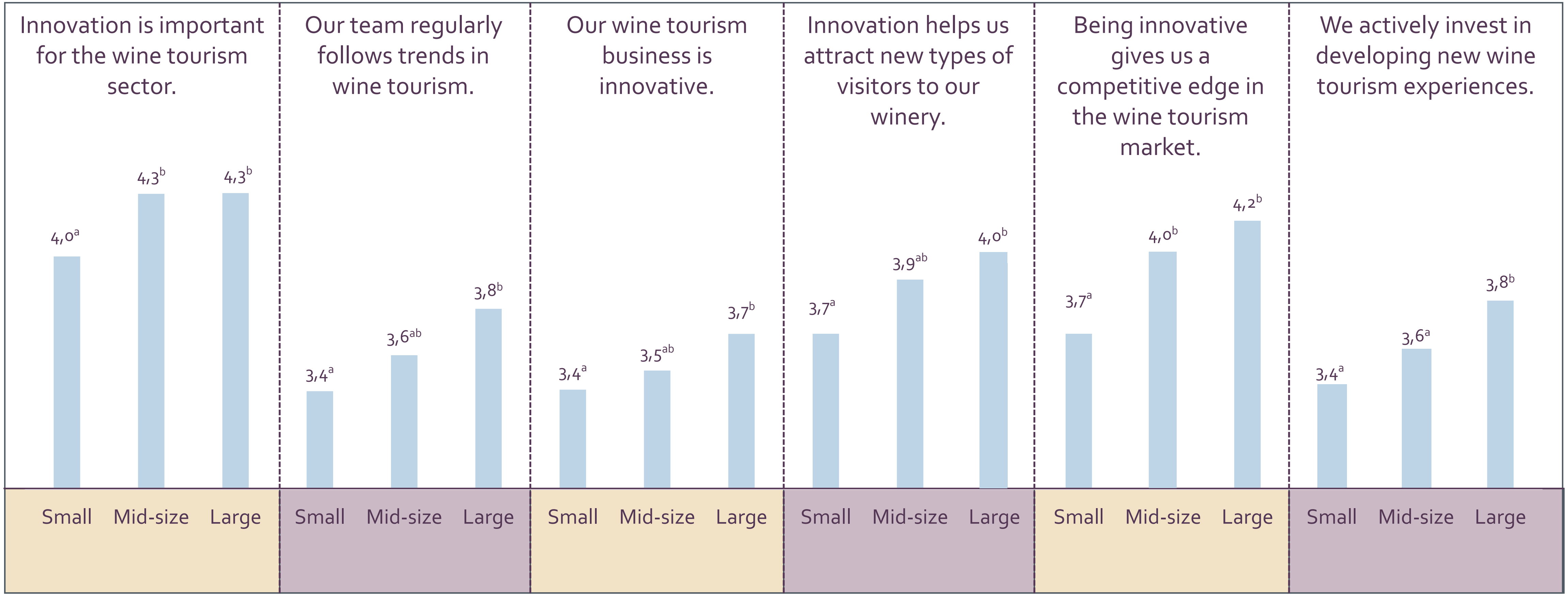


- Respondents from overseas wineries consistently rated innovation-related items higher than their European counterparts across all dimensions.
- The biggest regional difference is seen in the statement “Innovation is important for the wine tourism sector”, with a mean of 4.3 (overseas) vs. 4.1 (Europe), statistically significant ($p < 0.001$).
- The largest overall gap also appears in perceived competitiveness from innovation (Europe: 3.8; overseas: 4.0), also statistically significant ($p = 0.002$).
- All six items show significant differences between regions ($p < 0.05$), indicating a more innovation-driven mindset among overseas wineries.

* Lowercase superscript letters (a, b, c) indicate significant differences between the sub-groups.

Statements on innovation in wine tourism by winery size

(Only wineries with wine tourism; N=1,149; mean on a 5-point scale)



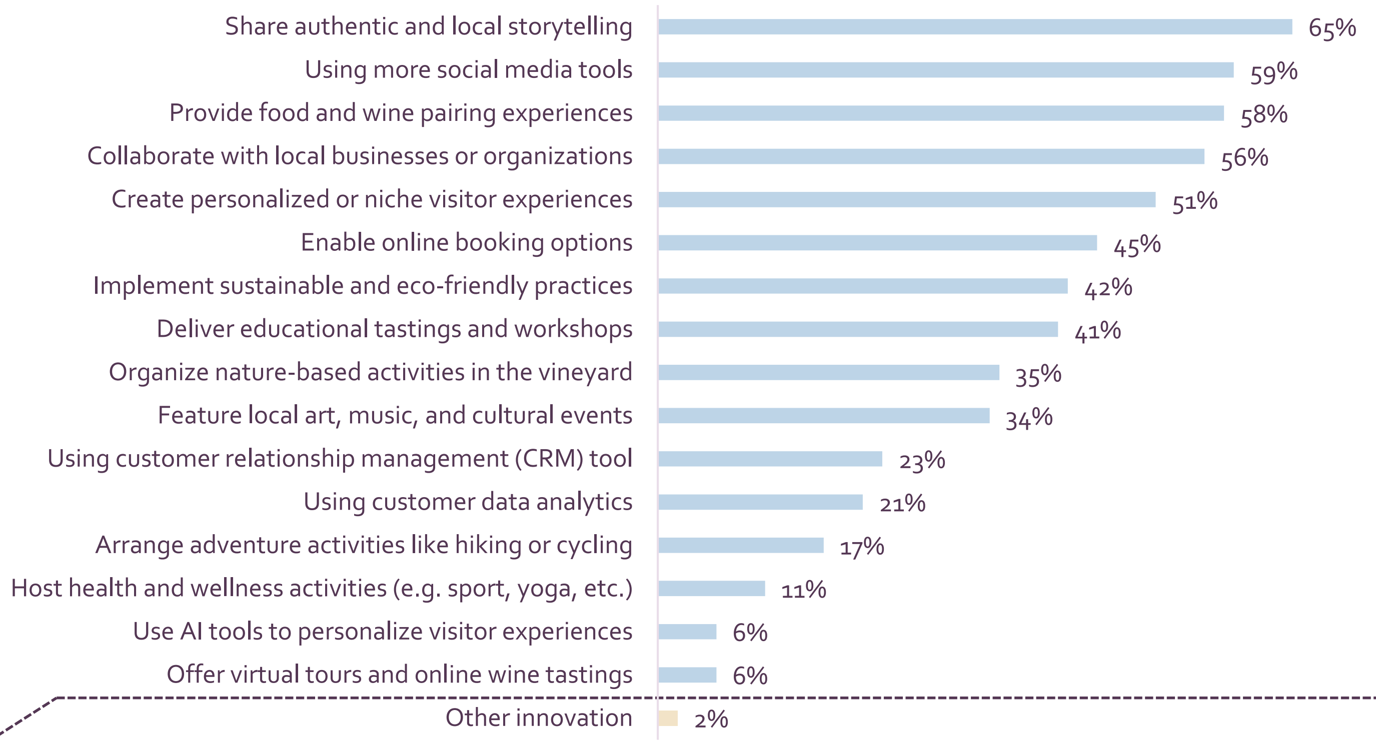
- Large wineries consistently show the highest scores across all innovation-related indicators, especially in competitive advantage (4.2) and trend awareness (3.8).
- Small wineries score significantly lower on multiple items, particularly in developing new wine tourism experiences (3.4) and trend-following behaviour (3.4).
- Mid-size wineries often lie in between but align closely with large wineries on most items, e.g., "attracting new visitors" (3.9 vs. 4.0).

* Lowercase superscript letters (a, b, c) indicate significant differences between the sub-groups.

Innovations in wine tourism

(Only wineries with wine tourism; N=1,149; in %)

Innovation in wine tourism – Response categories



Open answer – Other

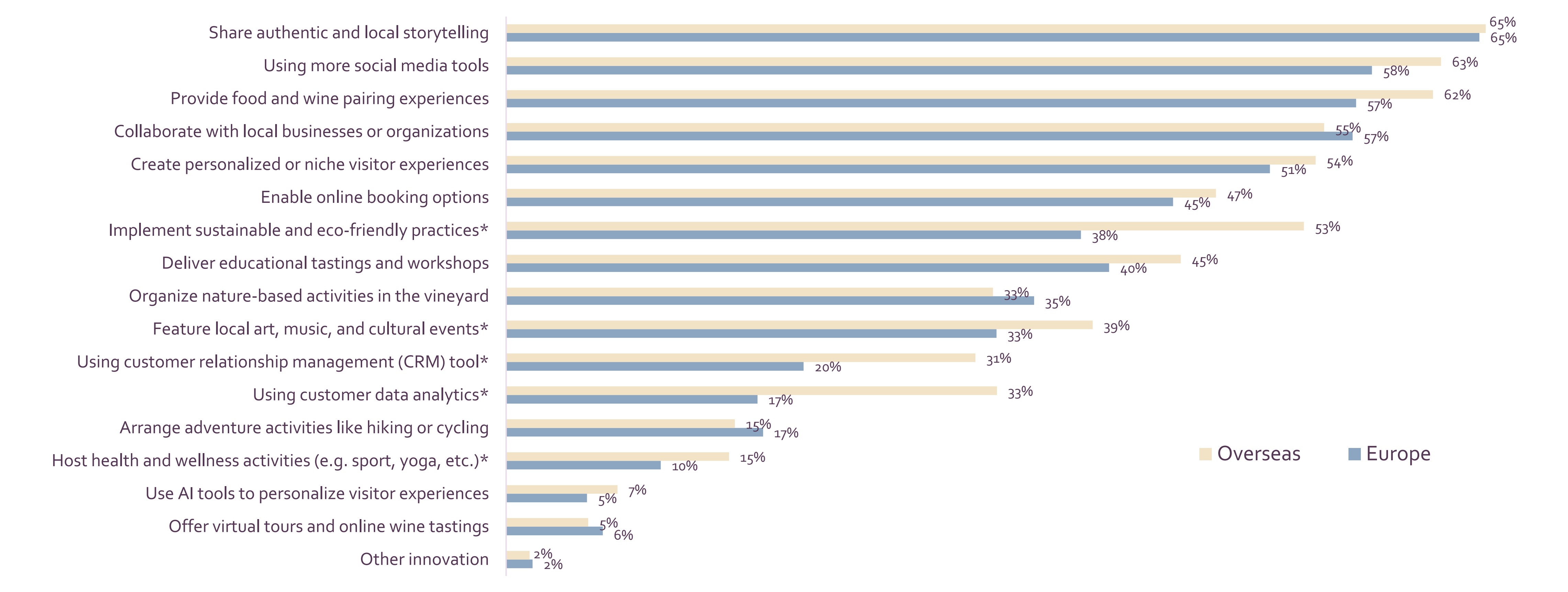
(Most mentioned; ordered by frequency of mention)

- Immersive experiences
- 24h self-service wine bar
- Crossover experiences with chocolate or beer
- Art & cultural events
- Afterwork events & product diversification

- Sharing authentic and local storytelling (65%) and enhanced social media usage (59%) are the most widely adopted innovation strategies in wine tourism.
- Over half of the respondents also focus on food & wine pairing experiences (58%) and collaboration with local businesses (56%).
- Educational, cultural, and nature-based formats play a crucial role, with 35–42% implementing workshops, art events, and vineyard-based activities.
- Technology adoption lags behind: only 6% use AI tools or offer virtual wine tastings.

Innovations in wine tourism by origin

(Only wineries with wine tourism; N=1,149; in %)

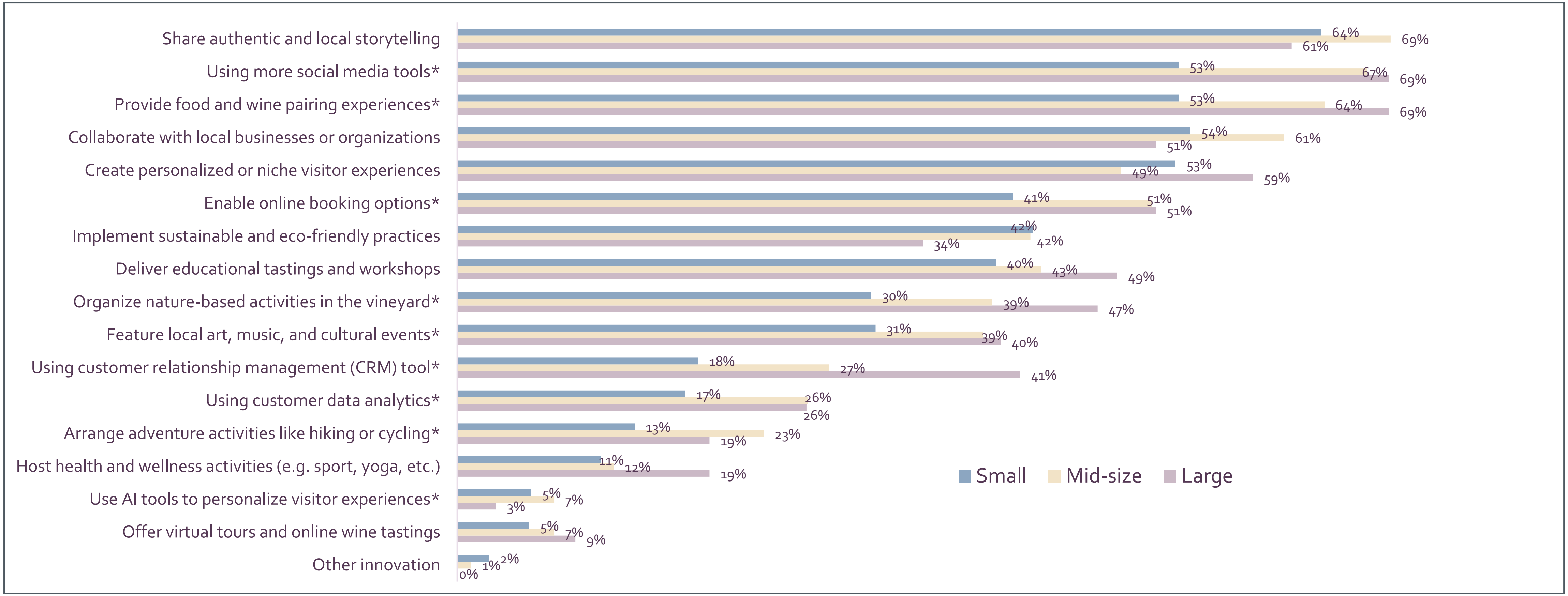


- Overseas wineries are significantly more likely to implement sustainable and eco-friendly practices than their European counterparts (53 % vs. 38 %, $p < 0.001$).
- Digital tools such as CRM systems and customer data analytics are also more widely used outside Europe (CRM: 31 % vs. 20 %, Analytics: 33 % vs. 17 %, both $p < 0.001$).
- Health and wellness activities (e.g. sport, yoga) are slightly more common in overseas offerings (15 % vs. 10 %, $p = 0.044$), suggesting broader experiential diversity.
- For most other innovation types like storytelling, virtual tastings, or nature-based activities were no significant regional differences found.

* Significant differences between the subgroups.

Innovations in wine tourism by winery size

(Only wineries with wine tourism; N=1,149; in %)



- Mid-size and large wineries significantly more often emphasize social media tools, food and wine pairing, online booking, and nature-based experiences.
- Overall, we can state that large organisations show a significantly higher level of innovation than small ones – this, however, may be due to their greater economic and human resource capacity rather than ambition alone.

* Significant differences between the subgroups.

Chapter 5
Summary

Top findings

Economic Impact: A clear majority of respondents recognise the substantial economic influence of wine tourism on regional development.

Barriers & Intentions: Lack of staff and lack of time are by far the most frequently mentioned barriers to offering wine tourism services. Nevertheless, one in four wineries has already decided to implement such activities, and 50% are considering doing so in the future.

Core Activities: Wine tastings, cellar tours, and vineyard tours are the most commonly offered wine tourism activities, providing visitors with the opportunity to connect with both the product and the surrounding nature. These experiences also enable winery staff to foster a closer relationship between guests and the wine.

Visitor Profiles: Visitor numbers are generally increasing in Europe, while they are tending to decline in overseas regions. The most prominent age group is 45–65 years, although visitors aged 25–44 are also well represented. Key trends include wine education, followed by sustainability, culinary experiences and growing interest from younger travellers.

Profitability & Sustainability: Two-thirds of wineries consider wine tourism to be profitable or very profitable, while approximately 30% report limited but stable returns. On average, wine tourism accounts for around 25% of total winery revenue. Currently, sustainability is perceived as important or very important by two-third of respondents for their wine tourism business.

Key Challenges: Economic pressures and declining consumption are the most frequently mentioned challenges, pointing to a fragile consumer market. Additionally, accessibility issues, regulatory barriers and public health policies pose significant obstacles to tourism activity. Shifting visitor preferences call for more flexible and innovative wine tourism strategies. Labour shortages and the ongoing digital transformation further underscore internal operational limitations.

Tourism Trends: Local, authentic, and niche experiences are at the forefront of current wine tourism trends. Culinary offerings and environmentally friendly practices serve as major attractions for visitors. Nature-related activities and digital engagement—particularly through social media—are also gaining in importance. There is a significant difference in the decrease of tourist numbers between overseas and Europe: overseas destinations report a 41% decline, while Europe shows only 17%. Furthermore, Europe appears to have a positive trend in increased tourism, whereas overseas wine tourism is moving in the opposite direction.

Innovation Strategies: The most widely adopted innovation strategies in wine tourism include sharing authentic local stories and increasing the use of social media. More than half of the respondents also prioritise food and wine pairing experiences, along with partnerships with local businesses. Educational, cultural, and nature-based formats are key components, often implemented through workshops, art events and vineyard-related activities.

Innovation & Investment: Innovation is widely acknowledged as essential for the future of wine tourism. Respondents agree that innovative approaches offer a competitive edge and help attract new visitor segments. The level of investment in new wine tourism experiences differs significantly based on each winery's philosophy and strategic approach.

Future Outlook: Half of the surveyed wineries are certain they will invest in wine tourism in the future. A majority also believe in a growing interest in wine tourism, both at the regional level and within their own operations. Furthermore, about two-thirds of respondents view wine tourism as a useful tool during times of crisis.

Acknowledgement

We would like to express our sincere gratitude to all cooperation partners, as well as to the institutions, organisations, and private individuals who supported this project by helping to distribute the questionnaire. Our heartfelt thanks also go to all the wineries that participated in the survey and generously shared their insights. Finally, we wish to thank Johann Leopold Bahr for his valuable assistance in visualising the results.

At the same time, we would like to invite everyone to a free webinar on 26 January 2026, where the results of the Report will be presented and explained in detail. Registration for the webinar: https://bit.ly/4npytq9

- The project team

Hochschule Geisenheim University

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