

Global Wine Tourism Report 2025

Executive Summary



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 and comparable 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 gap, 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.

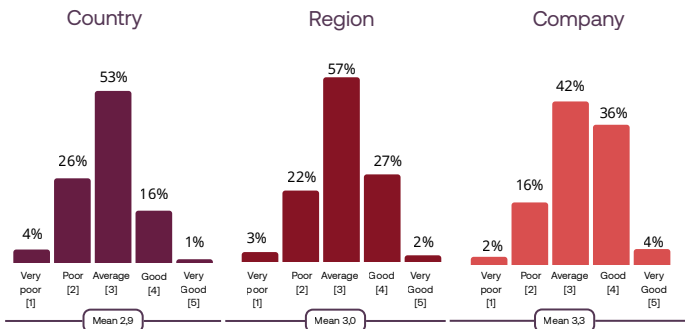
Methodology

Data collection took place between 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. To compare subgroups by country (Europe = Europe and the Caucasus; overseas = Americas, Oceania and Africa) 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.

1. Economic situation at different levels

A significant share of wineries rated their economic situation positively, while many others described it as average.

Current economic situation

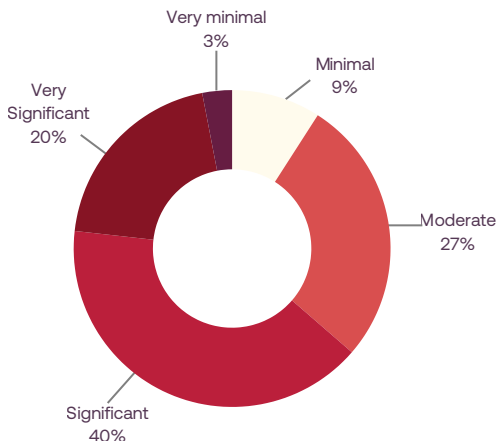


The economic situation was viewed most critically at the national level, with only a small share rating it “good” or “very good.”

Regional assessments were somewhat more positive, while respondents rated their own companies most favourably. European wineries assessed the situation more positively than their overseas counterparts, with the largest differences at national and regional level. By size, no differences appeared at these levels, but larger wineries viewed their own situation more positively than medium and small ones.

2. Impact of wine tourism in the region

Wine tourism is widely regarded as economically important across all regions and business sizes.

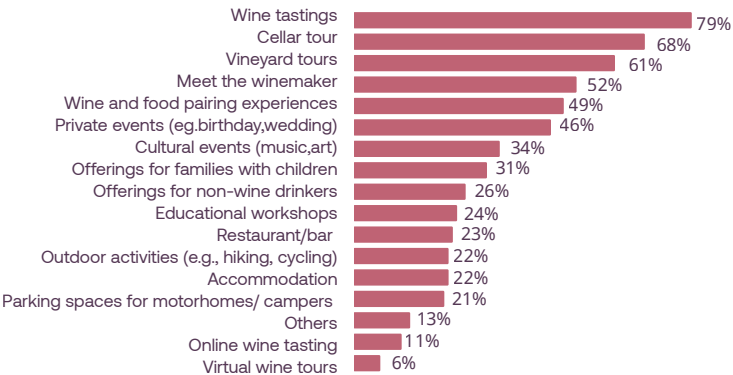


The majority of respondents (60%) considered wine tourism to have a significant or very significant economic impact in their region, while more than a quarter described the impact as moderate, reflecting variations depending on local context.

Only a small minority perceived it as minimal. Wineries from overseas rated the impact more positively than their European counterparts, whereas no notable differences were found between wineries of different sizes.

3. Wine tourism offerings

Wine tourism still dominated by classic formats, but innovative offerings are rising.



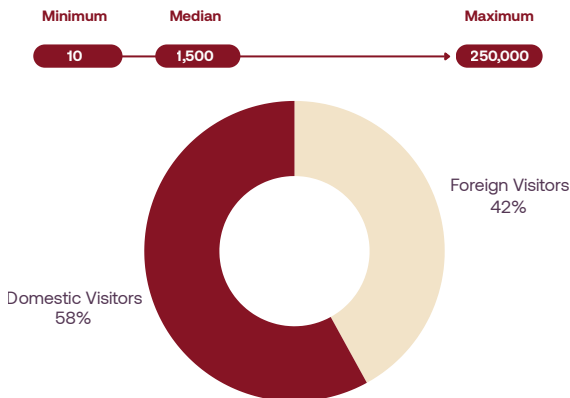
Wine tastings, cellar tours and vineyard tours are the most common wine tourism activities, while food pairings, meet-the-winemaker experiences and private events are also widespread.

Digital formats such as virtual tours or online tastings remain rare. Clear regional differences emerge: European wineries more often offer cellar tours, whereas overseas wineries are more likely to provide private events and options for non-wine drinkers.

Differences by winery size are mainly visible in cultural and educational activities, with larger wineries offering a broader range, while traditional activities are common across all sizes.

4. Number of visitors per year and share of domestic visitors

Wineries see variable visitor numbers, with larger share of domestic guests.



Wineries welcome a highly variable number of visitors, with a median of around 1,500 per year. More than a half of the visitors are domestic, reflecting strong national interest, though international tourists still represent an important share and growth potential (42%). European wineries attract significantly fewer visitors on average than those outside Europe, yet the proportion of domestic visitors is similar across regions.

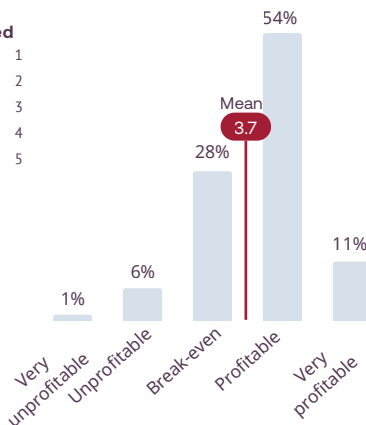
Visitor numbers rise markedly with business size, while the domestic-to-international ratio remains stable across all winery sizes.

5. Wine tourism profitability and share of total revenue

Wine tourism is clearly profitable, with its revenue share highest for non-European and smaller wineries.

5-Point scale applied

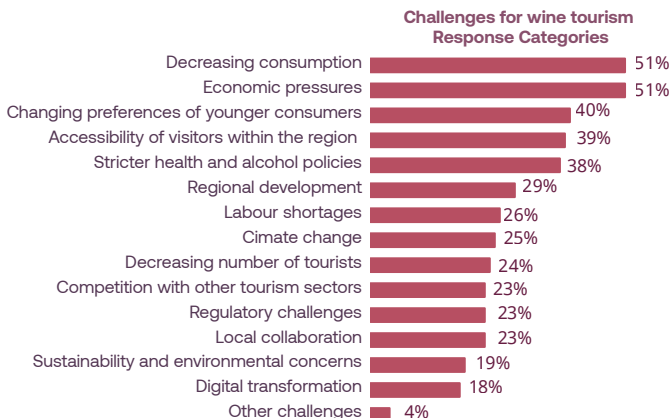
- Very unprofitable 1
- Unprofitable 2
- Break-even 3
- Profitable 4
- Very profitable 5



The majority of wineries consider wine tourism very profitable or profitable (65%), with only a small minority rating it unprofitable, resulting in an overall good profitability level. Profitability assessments are similar across European and non-European wineries as well as across different sizes, though large wineries report slightly higher ratings. In contrast, clear structural differences appear in revenue dependence ($\sigma=25\%$): non-European wineries derive a larger share of their income from wine tourism, and smaller wineries rely on it proportionally more than mid-size or large wineries.

6. Challenges of wine tourism

Key challenges with overseas wineries affected by economic decline and falling consumption



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

Wineries mainly struggle with declining consumption, economic pressures, changing visitor preferences, mobility, and regulatory barriers, alongside with regional development, labour shortages and climate change.

Regional contrasts are clear: overseas wineries are more affected by market contraction and shifts among younger consumers, while European wineries emphasize sustainability, digitalisation, and regulatory issues. By size, large wineries are more concerned with younger consumer behaviour and declining visitor numbers.

7. Trends in wine tourism

Wine tourism focuses on authenticity, with overseas wineries highlighting wellness and digitalisation, and larger ones outdoor offers.



Open answer- Other

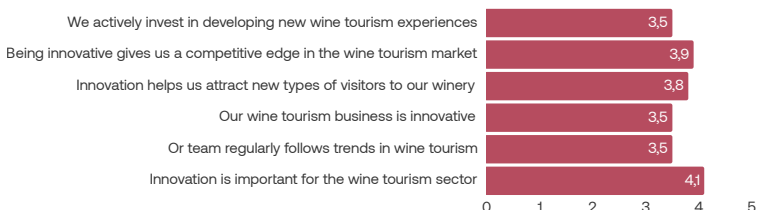
(Most mentioned, ordered by frequency of mention)

- 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

Wine tourism trends are dominated by authentic, culinary, cultural, and sustainable experiences, complemented by growing interest in nature, wellness, and outdoor activities. Digitalisation is becoming increasingly important, with rising use of social media, online booking systems, and customer data analytics, particularly among overseas, mid-size, and large wineries. In addition, overseas wineries tend to place greater emphasis on wellness activities, personalised offers, and digital tools, while larger wineries are particularly engaged in cultural programmes as well as adventure and outdoor experiences.

8. Engagement for innovation

**Innovation is essential for wine tourism;
engagement is stronger overseas and in
larger wineries**



5-Point scale applied

Strongly Disagree (1) Disagree (2) Neutral (3) Agree (4) Strongly agree (5)

Innovation is widely recognised as crucial for wine tourism and seen as a source of competitiveness and visitor attraction.

Overseas wineries consistently display a stronger innovation mindset than European ones, with significant differences across all dimensions.

By size, large wineries lead in competitiveness and trend awareness, mid-size wineries perform similarly on many aspects, while small wineries score lowest, particularly in developing new experiences and trend adoption.

9. Innovation in wine tourism

Wine tourism innovation centres on storytelling and local ties, with overseas and larger wineries leading. Digital tools still lag behind.



Open answer- Other

(Most mentioned, ordered by frequency of mention)

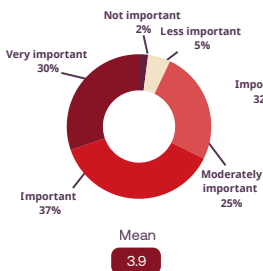
- Immersive experiences
- 24 self-service wine bar
- Crossover experiences with chocolate or beer
- Art & cultural events
- Afterwork events & product diversification

In wine tourism, the most common innovations are authentic storytelling, social media, food and wine pairing, and collaboration with local businesses, while educational, cultural, and nature-based activities also play an important role. Digital tools such as AI and virtual tastings remain rare. Overseas wineries are more advanced in sustainability, technology, and wellness, and larger wineries tend to innovate more broadly thanks to greater resources.

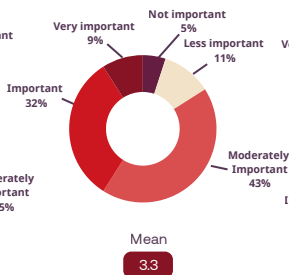
10. Sustainability

Sustainability is seen as important and its relevance is expected to grow.

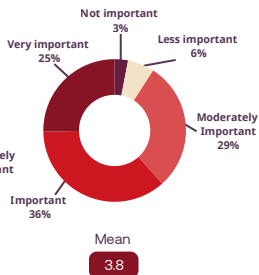
Importance of sustainability of wine tourism
from wineries perspective



Current significance
from visitors' perspective



Projected significance
over the next five years
from visitors' perspective



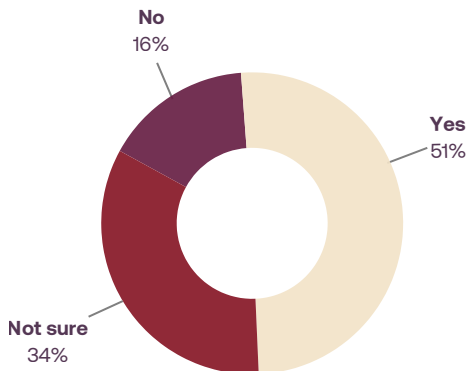
Sustainability is already considered important by most wineries and is expected to gain even more relevance in the future.

Overseas wineries place significantly higher emphasis on it than European ones, while differences by size are minimal and not statistically significant.

Across all winery sizes, expectations for the role of sustainability in visitor demand are rising, reflecting general optimism about its long-term importance.

11. Investment in wine tourism

A high number of wineries worldwide plan to invest in wine tourism.

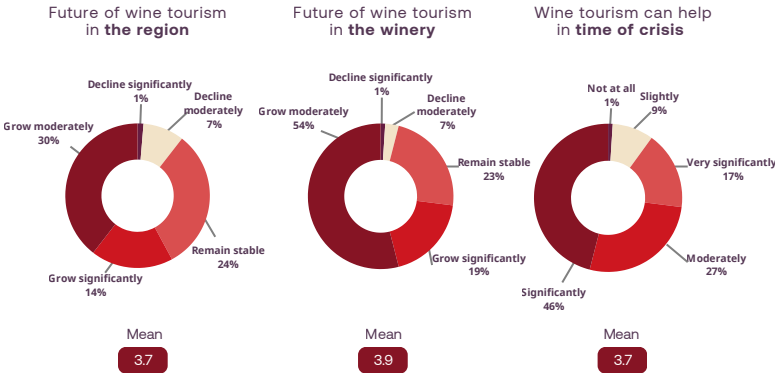


Half of the wineries express an intention to invest in wine tourism, while over a third remain uncertain, reflecting hesitation or lack of planning, and only a small minority clearly rule out investment.

Overseas wineries show a significantly higher willingness to invest compared to European ones, whereas differences by size are modest, with larger wineries somewhat more inclined to invest than small or mid-sized wineries but without statistical significance.

Future of wine tourism

Wineries expect wine tourism to grow and support building resilience, with regional but few size differences.



Most wineries are optimistic about the future of wine tourism, both regionally and for their own businesses, and many view it as a useful tool in times of crisis.

European wineries are slightly more positive about growth, while overseas wineries show greater confidence in wine tourism’s crisis resilience. Mid-sized wineries express the highest optimism, though differences by size are minor and not statistically significant.

Summary

Wine tourism is already a key pillar of the wine sector and is expected to gain even greater importance worldwide through its economic impact, experiential diversity, and future growth potential.

Wine tourism has become a vital pillar of the wine sector, contributing significantly to the economic stability of wineries and regions alike.

Most wineries regard it as profitable and expect its role to continue growing, both for their businesses and for regional development.

Tourists increasingly seek authentic, cultural, sustainable, and nature-oriented experiences, while digitalisation and innovation are emerging as important drivers of competitiveness.

Despite regional differences—overseas wineries often more optimistic and innovation-driven, Europeans more focused on sustainability—the overall outlook for wine tourism is highly positive.

Together, these findings underline that wine tourism is not only of great current importance but will play an even greater role in the future of the global wine industry.

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Quotation: Szolnoki, G. (2025), Global Wine Tourism Report 2025. 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. Doi: 10.13140/RG.2.2.23740.50564

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