



GWC Members Data Report

Executive Summary

December, 2025

1. Global Reach and Impact: A Network Uniting Wine Excellence Across Continents

The Great Wine Capitals Global Network has consolidated its position as the world's premier alliance of wine regions, spanning 11 countries across four continents. With a combined population of 24.43 million people and hosting 56 million tourists in 2024, the network represents far more than a collection of distinguished wine destinations. It embodies a **strategic alliance** that amplifies international visibility, fosters cross-cultural exchange, and establishes best practices in wine tourism development.

The network's geographic diversity—from Adelaide's sun-drenched vineyards to Porto's terraced Douro Valley, from San Francisco-Napa Valley's innovative cellars to Mendoza's Andean landscapes—creates a comprehensive tapestry of wine experiences that no single region could offer independently. This diversity serves as the network's greatest asset, allowing member regions to learn from each other's successes, share resources, and present **a united front in global markets** increasingly dominated by consolidated marketing efforts.

In 2024, the collective wine production of GWC members reached approximately 29 million hectoliters, representing 12.9% of global wine output despite managing only 516,000 hectares of vineyards worldwide. This concentration of production efficiency demonstrates the **network's focus on quality over quantity**, a strategic positioning that **aligns with evolving consumer preferences in premium segments**.

The network's influence extends beyond mere production figures. Member regions collectively manage some of the world's most prestigious appellations and denominations: from Bordeaux's 65 appellations to Verona's 15 DOC and 5 DOCG designations, from Mendoza's pioneering Controlled Origin Denominations to the Douro Valley—the world's oldest demarcated wine region. This concentration of recognized quality standards provides GWC with unparalleled credibility in international markets and positions the network as the **authoritative voice in premium wine tourism**.

The strategic value of the network becomes particularly evident when examining tourism economics. Wine tourists consistently demonstrate higher spending patterns than general tourists, seeking immersive experiences that combine hospitality, gastronomy, culture, and education. By coordinating marketing efforts and sharing best practices, GWC members have successfully positioned wine tourism as a sophisticated, **year-round economic driver rather than a seasonal supplement** to traditional viticulture.

2. Production Insights: Navigating Global Shifts Through Quality and Sustainability

The global wine industry faced **unprecedented challenges** in 2024, with world production estimated at 225.8 million hectoliters—the lowest level in over 60 years and a 4.8% decrease from

2023. Extreme climatic conditions including frosts, droughts, and heavy rainfall affected vineyards across both hemispheres, forcing a fundamental reassessment of traditional viticultural practices.

Within this challenging context, GWC regions have demonstrated remarkable **resilience and strategic adaptation**. Rather than viewing declining production as a crisis, member regions have embraced it as an opportunity to accelerate their transition toward sustainable, quality-focused viticulture. This shift reflects a deeper understanding that long-term success depends not on volume expansion but on environmental resilience, brand positioning, and added value.

The network's total vineyard surface decreased from 644,000 hectares in 2022 to 516,000 hectares in 2024, mirroring the global contraction trend. However, this reduction masks significant strategic repositioning. GWC regions such as Mendoza, San Francisco-Napa Valley, and several Southern European members have deliberately pursued selective viticulture models that prioritize premium production, environmental sustainability, and tourism integration over planted area expansion.

Mendoza exemplifies this evolution, maintaining its position as the network's largest producer with 8.8 million hectoliters in 2024 while managing 149,000 hectares of vineyards. The region has successfully balanced quantity with quality, earning international recognition through awards and establishing itself as the global capital of Malbec. Similarly, Bordeaux has adapted to changing consumer preferences, with increasing emphasis on white wines and sparkling varieties while maintaining its red wine heritage through sustainability initiatives affecting over 75% of its vineyard area.

The shift toward organic and biodynamic viticulture represents perhaps the most significant transformation within the network. Mainz-Rheinhessen has emerged as a leader in this movement, with numerous wineries offering ecological wine experiences and tours of organically cultivated vineyards. This commitment to environmental stewardship extends beyond production methods to encompass broader ecosystem considerations, including biodiversity preservation, water management, and carbon neutrality goals.

Climate resilience has become a central concern across all member regions. Porto's producers in the Douro Valley are implementing regenerative agriculture approaches, while Valparaíso-Casablanca Valley is actively transitioning toward becoming a 100% sustainable wine region. These initiatives respond not only to environmental imperatives but also to evolving consumer expectations, particularly among younger demographics who increasingly view sustainability as a non-negotiable component of their purchasing decisions.

The production data reveals another critical insight: the growing importance of varietal diversity and terroir expression. The data shows how traditional varieties remain dominant—Tempranillo in Rioja, Cabernet Sauvignon in San Francisco-Napa Valley, Merlot in Bordeaux—many regions are expanding their portfolios to include both indigenous varieties and innovative blends. This diversification strategy allows regions to differentiate themselves in crowded markets while providing visitors with unique tasting experiences that cannot be replicated elsewhere.

3. GWC Wineries and Tourism Expansion: Building Immersive Experiences That Drive Economic Growth

The wine tourism infrastructure within the GWC network experienced remarkable growth between 2022 and 2024, with the number of wineries increasing from 13,357 to 13,472—a modest but significant 0.86% rise that belies more dramatic shifts in visitor accessibility and experience quality. The most striking transformation occurred in tourist-open facilities, which surged by

45.9%, from 1,533 establishments in 2022 to 2,236 in 2024. These figures, while representing available data from reporting member regions, likely underestimate the network's true scale, as several capitals lack centralized registries for tourism-accessible wineries—a data infrastructure gap that the network should address to capture its complete economic impact.

This expansion reflects a fundamental shift in **how wineries conceive their role** within regional economies. Wine production alone no longer suffices to ensure financial sustainability, particularly for small and medium-sized producers. Instead, direct-to-consumer experiences through **wine tourism have become essential revenue streams**, offering higher margins than traditional distribution channels while building brand loyalty and creating emotional connections with visitors.

Mendoza illustrates this transformation, with the number of officially recognized tourist wineries increasing by over 57% in six years, surpassing 230 active facilities by early 2024. This growth has been accompanied by significant investment in high-end hospitality infrastructure, including new luxury lodges, boutique hotels within wineries, and sophisticated tasting rooms in urban centers. The region has successfully positioned itself not merely as a wine destination but as a comprehensive luxury travel experience that integrates gastronomy, adventure tourism, and cultural exploration.

San Francisco-Napa Valley continues to lead in visitor spending metrics, with tourism expenditure exceeding pre-pandemic levels despite relatively stable visitor numbers. This achievement stems from the region's deliberate strategy of emphasizing premium, personalized experiences over mass tourism. Wineries have invested heavily in enhanced hospitality offerings, including private tastings, food pairings designed by acclaimed chefs, and intimate interactions with winemakers. The result is a visitor economy where quality of experience trumps quantity of visitors, generating sustainable economic benefits while preserving the region's environmental and cultural integrity.

Bilbao-Rioja exemplifies how **strategic urban-rural connectivity enhances wine tourism impact**. The region welcomed 912,438 winery visitors in 2024, with 214 wineries open to tourism and investment in wine tourism infrastructure increasing by 70% year-over-year. The Vivanco Museum of Wine Culture, holder of a lifetime GWC Special Achievement Award alongside WOW Porto and Cité du Vin Bordeaux, demonstrates the region's commitment to world-class interpretive experiences that complement traditional winery visits.

The investment trends within member regions reveal **strategic priorities for the coming years**. Adelaide has seen major developments including a \$100 million luxury project in the Barossa Valley, while government support programs totaling \$4.35 million focus on vineyard waste management, domestic demand stimulation, and Chinese market re-engagement. These investments recognize wine tourism's role as a multiplier within broader economic development strategies, creating employment not only in viticulture but across hospitality, transportation, construction, and creative industries.

Infrastructure development extends beyond individual wineries to encompass regional tourism ecosystems. Bordeaux's Cité du Vin stands as perhaps the network's most ambitious cultural project—a 13,500-square-meter architectural landmark offering immersive, high-tech exhibits on wine history and culture.

This investment in interpretive infrastructure attracts visitors who might never visit individual wineries while elevating the entire region's cultural profile. Similarly, Vivanco Museum of Wine Culture in GWC Bilbao-Rioja and Porto's WOW (World of Wine) district, featuring seven museums, twelve restaurants, and a wine school, demonstrates how coordinated destination development can transform urban areas into wine tourism magnets.

The **growth in tourist-open facilities** has created new economic opportunities for peripheral service providers. Transportation companies now offer specialized wine tour services, restaurants have developed wine-pairing menus featuring local producers, and hotels create packages integrating accommodation with winery visits. This ecosystem approach ensures that tourism benefits distribute broadly across regional economies rather than concentrating solely within production facilities.

Digital integration represents another frontier in tourism expansion. Several regions have invested in technological solutions that enhance visitor experiences while addressing capacity constraints. Virtual reality wine tours, online tasting platforms, and AI-powered recommendation systems allow wineries to reach global audiences and pre-qualify visitors, ensuring that in-person experiences cater to genuinely interested, high-value guests. Mainz-Rheinhessen has been particularly active in this space, using digital technologies to promote wine sales through online platforms while maintaining the authentic character of physical visits.

4. Trends for Strategic Growth: Aligning GWC with Evolving Traveler Expectations

The wine tourism landscape continues its rapid evolution, driven by demographic shifts, technological innovation, and changing consumer values. Four interconnected trends will shape strategic planning for GWC members through 2026 and beyond: sustainability as a core value proposition, experiential travel seeking authentic immersion, technological enhancement of visitor journeys, and educational tourism blending culture with knowledge acquisition.

Sustainability and Green Tourism

Environmental consciousness has transitioned **from niche concern to mainstream expectation**, particularly among millennial and Generation Z travelers who will increasingly dominate tourism markets. These demographics view sustainability not as an optional feature but as a baseline requirement, actively researching destinations' environmental practices before making travel decisions. For GWC regions, this shift presents both challenge and opportunity.

The challenge lies in implementing meaningful sustainability practices across entire regional ecosystems, not merely within individual wineries. Visitors increasingly scrutinize transportation options, accommodation practices, waste management systems, and broader community impacts. Regions that offer comprehensive green tourism experiences—integrating cycle tours, public transportation, farm-to-table dining, and zero-waste initiatives—will capture growing market segments willing to pay premium prices for guilt-free indulgence.

The opportunity stems from wine regions' natural advantages in sustainability storytelling. Vineyards' direct dependence on healthy ecosystems makes environmental stewardship both practical necessity and authentic narrative. Hawke's Bay has leveraged this effectively, using sustainability initiatives such as solar panels, sheep for weed control, and biodiversity programs as marketing differentiators. When visitors witness sheep grazing between vine rows or solar arrays powering tasting rooms, sustainability transforms from abstract concept to tangible experience.

Climate resilience initiatives also provide compelling content for visitor engagement. Educational programs explaining adaptation strategies—drought-resistant rootstocks, water conservation technologies, soil health practices—appeal to intellectually curious travelers while demonstrating regions' commitment to long-term viability. These programs position wine tourism as inherently future-oriented rather than nostalgically backward-looking.

Experiential and Immersive Travel

Contemporary wine tourists seek **experiences that transcend passive tasting room visits**. They want to participate actively in wine culture, whether through grape stomping, blending their own wines, participating in harvest activities, or engaging in extended conversations with vignerons about philosophy and technique. This desire for immersion reflects broader tourism trends away from sightseeing toward authentic participation in local life.

Lausanne has identified key components of immersive experiences: hands-on activities, sensory engagement, authentic winemaker interactions, and integration with surrounding landscapes through vineyard walks and picnic facilities. These elements transform wine tourism from consumption activity to cultural participation, creating memorable experiences that visitors share widely through social media and personal recommendations.

The most successful immersive experiences achieve multi-sensory engagement. Verona's Valpolicella Wine Road combines tasting with the visual drama of terraced hillsides, the tactile experience of walking through historic cellars, and the auditory backdrop of local music and conversation. Adelaide's emphasis on linking food and wine, nature and wine, recognizes that wine alone no longer suffices as standalone attraction—it must integrate within broader sensory and cultural contexts.

Events programming has emerged as a crucial tool for creating immersive experiences while attracting audiences with diverse interests. Hawke's Bay has successfully deployed marathons, music festivals, and art events to draw visitors who might not initially identify as wine enthusiasts but discover wine tourism through adjacent interests. This strategy expands market reach while enriching the cultural vitality of wine regions.

Smart Experiences and Technological Innovation

Technology's role in wine tourism extends far beyond online booking systems. AI-powered guides, augmented reality applications, interactive mapping tools, and personalized recommendation engines are redefining how visitors explore wine regions and engage with producers. Porto has been particularly active in deploying these technologies, offering customized tasting paths based on individual profiles and preferences.

The strategic value of technology lies in its **capacity to enhance rather than replace human interaction**. Virtual reality wine tours allow prospective visitors to preview experiences before committing to travel, effectively serving as sophisticated marketing tools. Once visitors arrive, digital aids can provide multilingual information, historical context, and educational content that enriches rather than distracts from direct sensory experience.

Technology also addresses capacity management challenges that many popular regions face. By enabling advance booking, timed entry systems, and crowd monitoring, digital tools help distribute visitor flows more evenly across time periods and geographic areas, reducing pressure on overtouristed sites while revealing hidden gems to adventurous travelers.

Educational Tourism and Learning Journeys

Wine's inherent complexity makes it ideally suited for educational tourism, a rapidly growing segment **seeking intellectual engagement alongside sensory pleasure**. Visitors increasingly want to understand not merely what they taste but why particular flavors emerge from specific terroirs, how climate influences ripening, what distinguishes organic from biodynamic viticulture, and how winemaking decisions shape final products.

Bordeaux and San Francisco-Napa Valley have led in developing sophisticated educational

programming that blends science, culture, and gastronomy. These programs recognize different audience segments—from novices seeking foundational knowledge to connoisseurs pursuing advanced technical understanding—and tailor content accordingly. The key is avoiding pedantry while respecting visitors' intelligence and curiosity.

Heritage tourism represents a specialized form of educational travel gaining momentum across GWC regions. Visitors increasingly seek experiences highlighting the region's agricultural traditions, local artisans, and landmark sites. This interest in cultural and historic roots creates opportunities for storytelling that connects contemporary wine production to generations of accumulated knowledge and community identity.

The educational dimension extends to younger audiences through programs specifically designed for millennials and Generation Z. These demographics appreciate wine tourism's learning potential but resist traditional formats that feel stuffy or exclusionary. Regions succeeding with younger visitors combine education with social engagement, wellness activities, and cultural exploration, presenting wine as one element within broader lifestyle experiences rather than isolated pursuit.
