

ONLINE WINE TASTINGS



WINE TOURISM WORLDWIDE – A GLOBAL SURVEY

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The Covid-19 pandemic has rapidly accelerated the digitalization of the wine industry – especially in the fields of communication and sales. One result of this dynamic has been online wine tastings shooting up like mushrooms in the last twelve months, offering a completely new experience for consumers. Pioneers of online wine tastings are setting a new standard and introducing an innovative tool which combines various goals: contact with already existing customers, recruiting new customers, and entertainment and boosting sales.

In order to collect reliable data on these topics, in January 2021 a global online survey was conducted with 1,423 wineries from more than 40 countries. Within the framework of the survey, we've dealt with topics such as "reasons for offering online wine tasting", "profitability", "structure of the new online tool", and many other questions.

The results of the survey show clearly the effect of Covid-19 on the growing tendency to employ online wine tastings and that this tool is more than simple entertainment for wine lovers, but also has a tangible business aspect.

We are very delighted about the high number of participants, which mirrors the global interest in this innovative solution. We wish you lots of fun studying the results of this survey!

Yours sincerely,

The Research Team from Stockholm and Geisenheim

Chapter 2

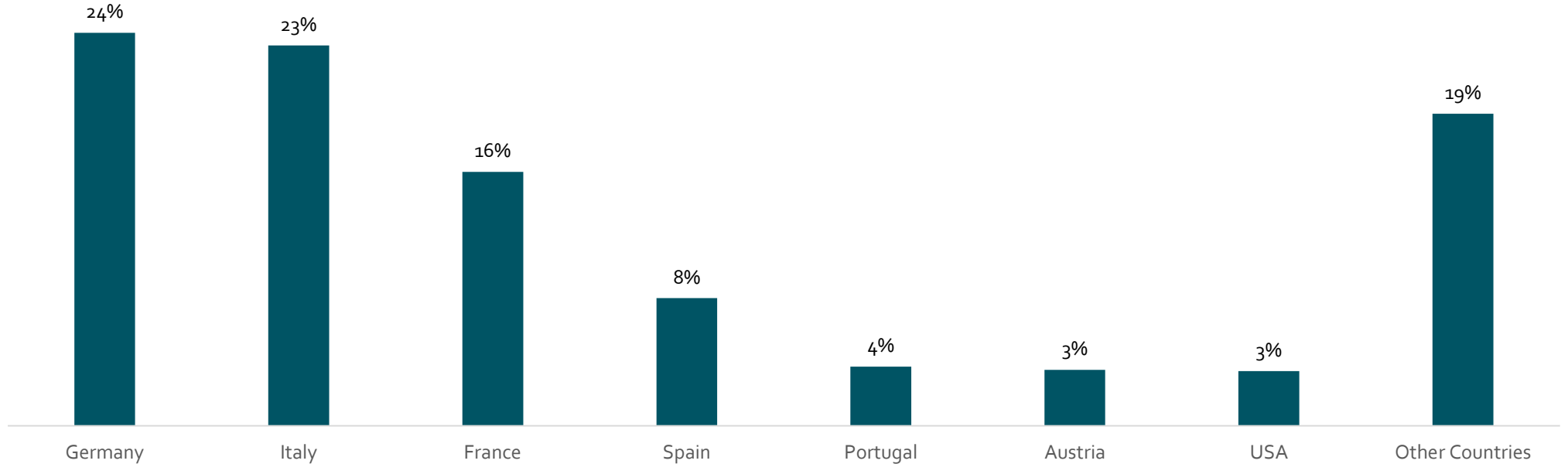
DESCRIPTION OF THE SAMPLE

Chapter 2.1

COUNTRY AND COMPANY SIZE

Country

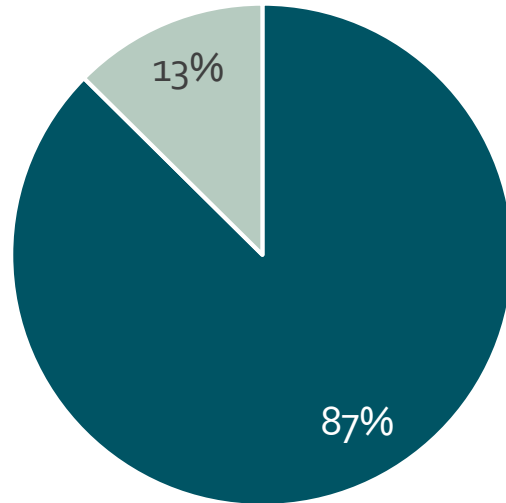
(All wineries; N=1,423; in %)



- A total of 1,423 wineries from 42 countries participated in the survey.
- 81% of the wineries surveyed are from one of the seven displayed countries. "Other Countries" summarizes a total of 35 countries, which together represent 19 % of the wineries in the survey.
- Germany and Italy together represent 47% of all participating wineries.

Old World vs. New World

(All wineries; N=1,423; in %)

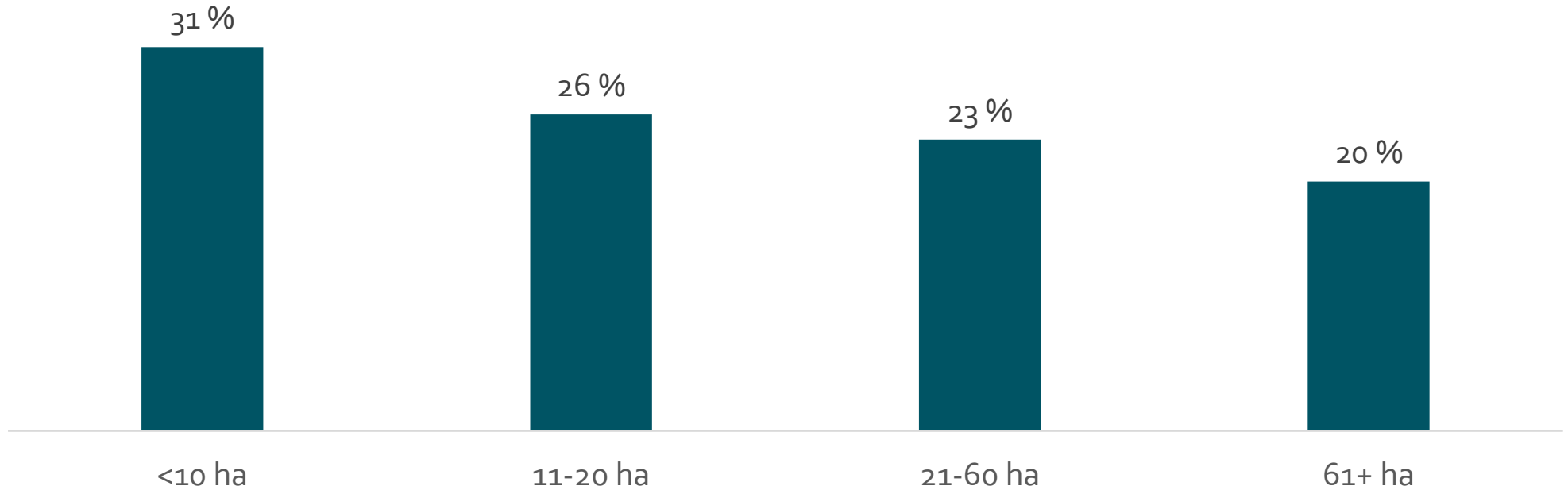


■ Old World ■ New World

- 87 % of the wineries surveyed come from Old World countries.

Size of the winery

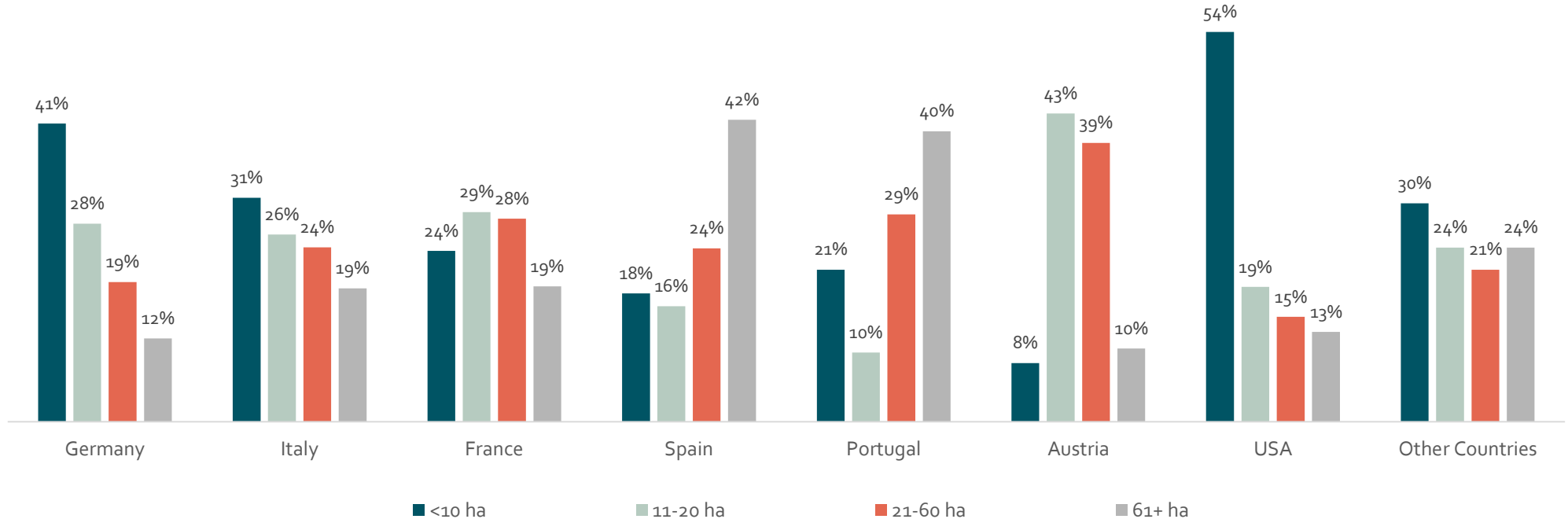
(All wineries; N=1,423; in %)



- More than half of the participants (57%) runs small to medium-sized wineries (up to 20 hectares).
- 20% of the participants run big wineries with more than 60 hectares.

Country classified by size

(All wineries; N=1,423; in %)



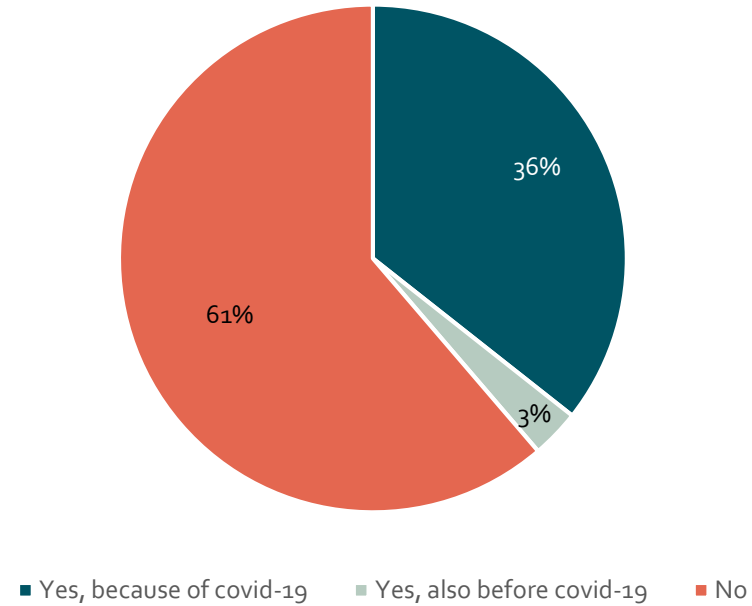
- Most of the wineries are located in Europe (87%).
- The different farm sizes are well distributed in the most represented countries.
- High number of small wineries among the participants from Germany and the USA.
- Spain has the highest proportion of large wineries.

Chapter 2.2

SHARE OF WINERIES CONDUCTING ONLINE WINE TASTINGS

Share of wineries conducting online wine tastings

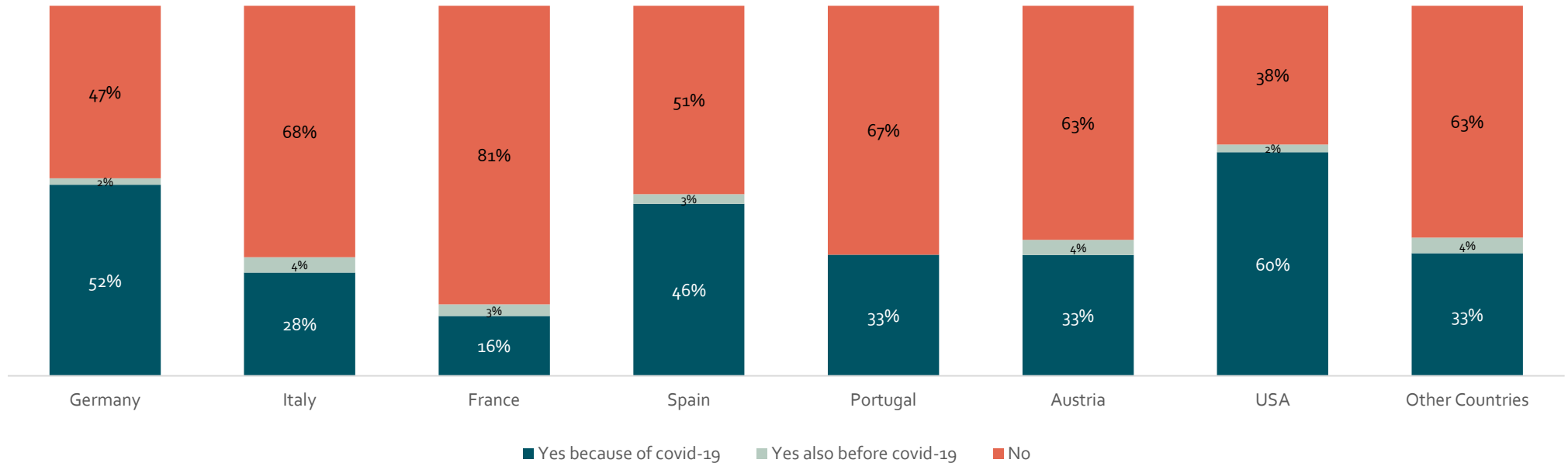
(All wineries; N=1,423; in %)



- Around one-third of the wineries surveyed (36%) introduced online wine tastings because of Covid-19. Only 3% organized online wine tastings before the pandemic.
- In contrast, over 60% of respondents did not offer online wine tastings for various reasons.

Share of wineries conducting online wine tastings by country

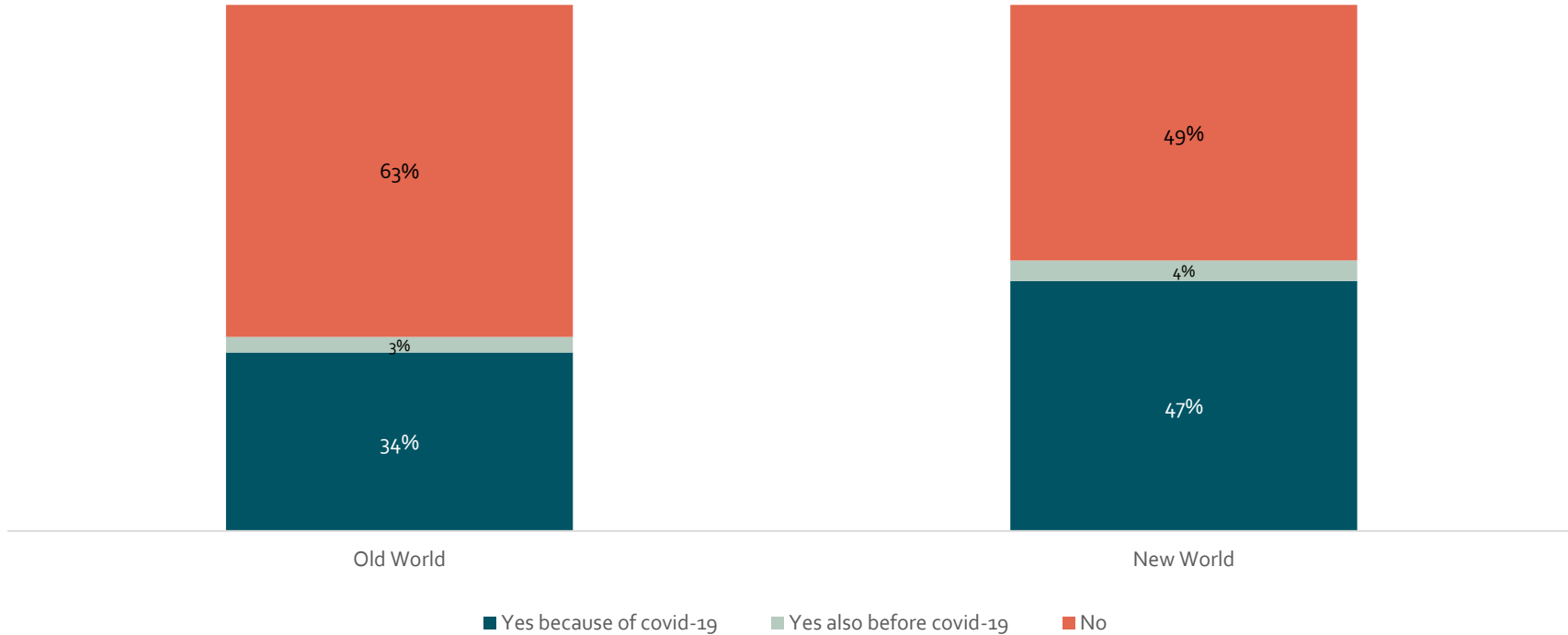
(All wineries; N=1,423; in %)



- In the USA, Germany and Spain, wineries offered the most online wine tastings because of Covid19.
- In contrast, only 16% of the wineries surveyed in France offered online wine tastings.
- In Italy, Portugal and Austria, a third offered wine tastings online.

Share of wineries conducting online wine tastings by OW/NW

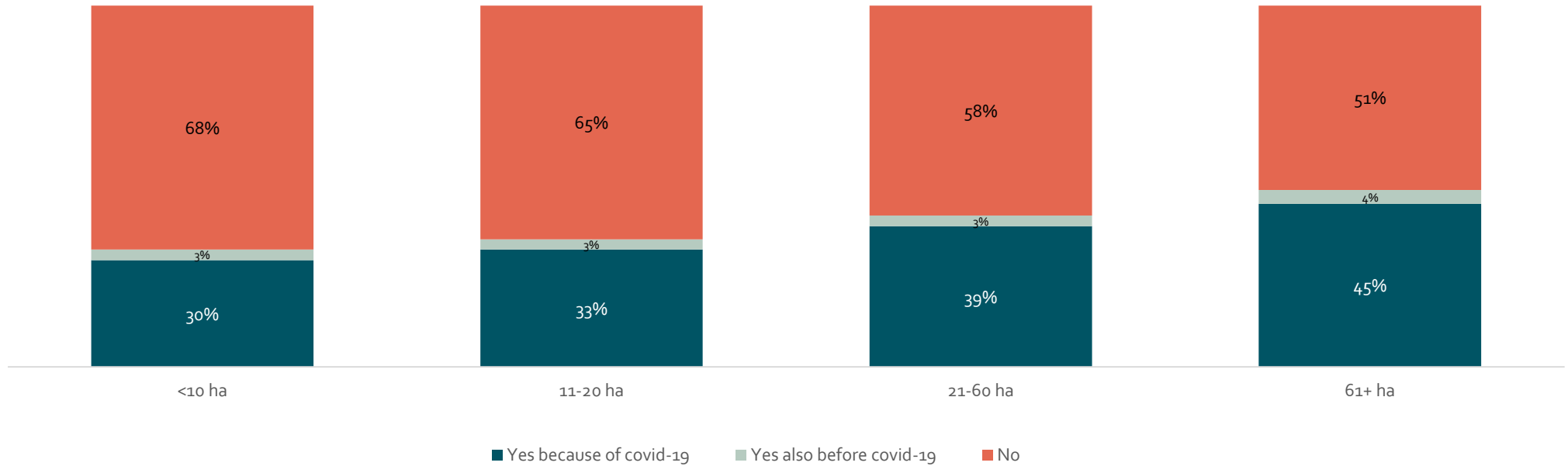
(All wineries; N=1,423; in %)



- The Old World wineries offered less online wine (34%).
- In the New World, they were more willing to offer online wine tastings (47%).
- About half of all surveyed wineries did not offer online wine tasting for various reasons.
- Online wine tasting is an effect of the pandemic - only a few wineries already offered online wine tastings before Covid19.

Share of wineries conducting online wine tastings by size

(All wineries; N=1,423; in %)



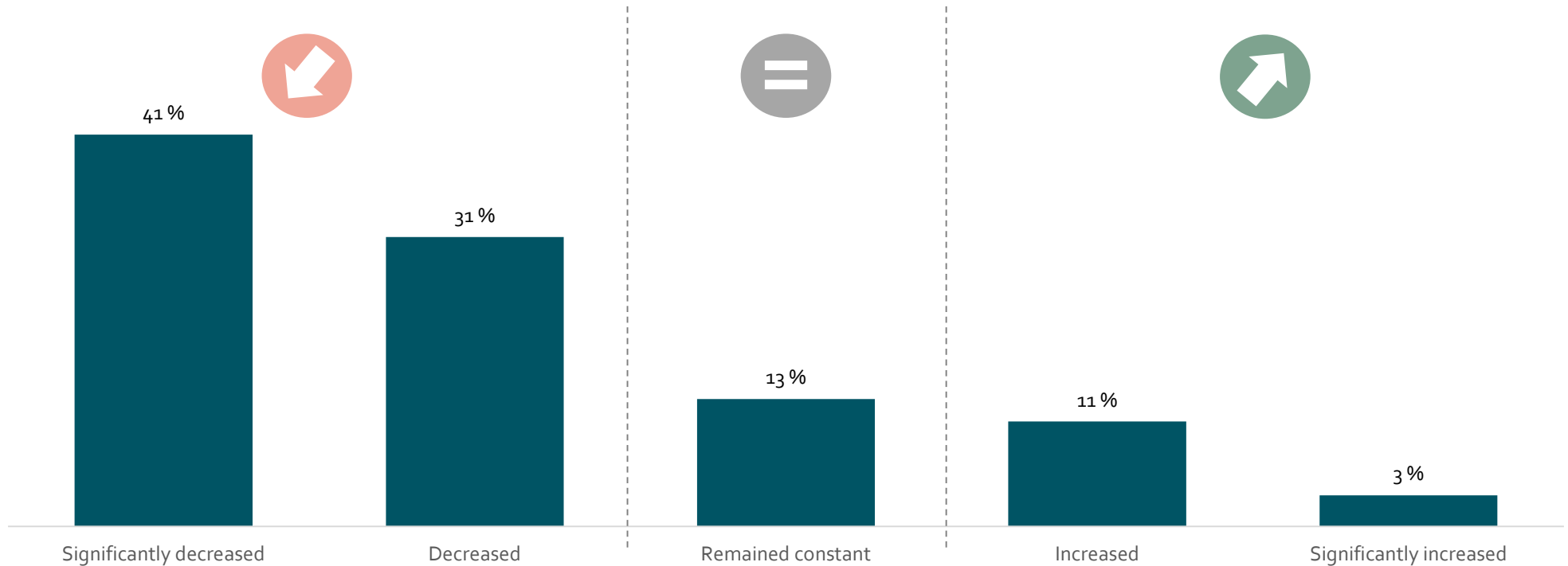
- Size matters – the larger the winery the more online wine tastings have been organized.

Chapter 2.3

NUMBER OF WINERY VISITORS COMPARED TO 2019

Number of winery visitors compared to 2019

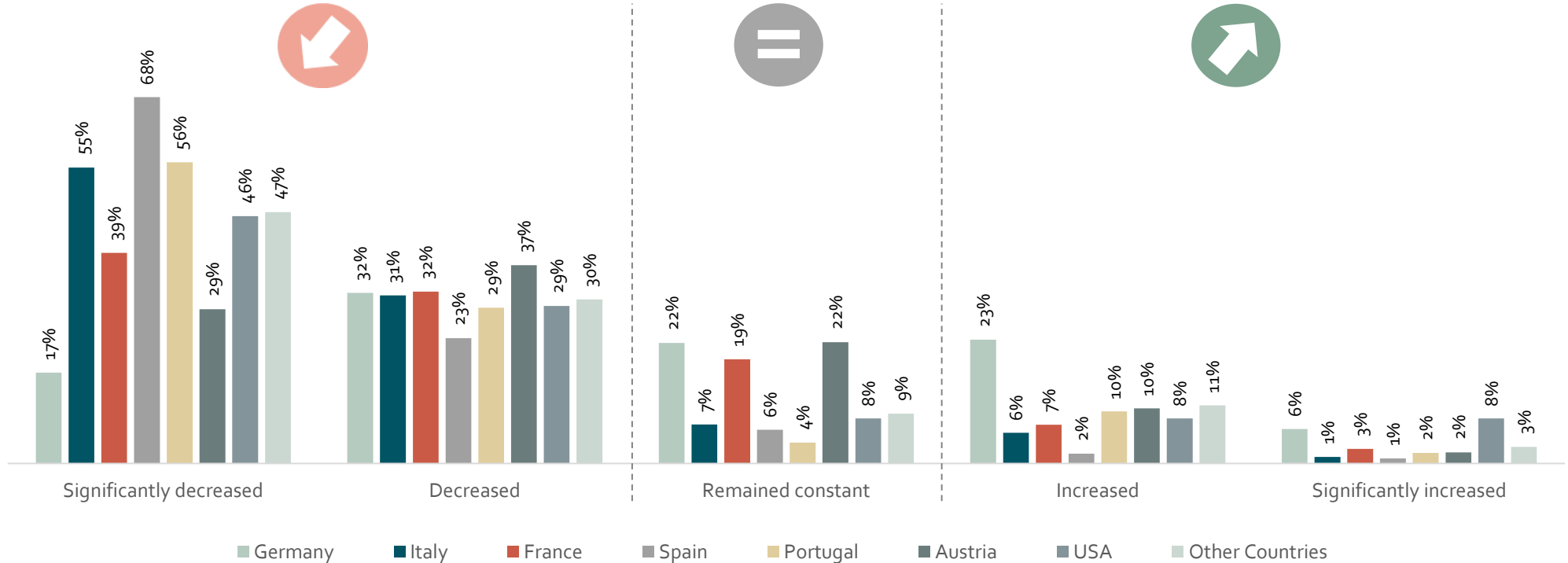
(All wineries; N=1,423; in %)



- The Covid-19 pandemic undeniably had a significant, negative impact on the number of visitors for wineries. More than two-thirds of the wineries (72%) reported a decline in visitor numbers.
- Only 14% of the wineries were able to record an increase compared to the previous year.

Number of winery visitors compared to 2019 by country

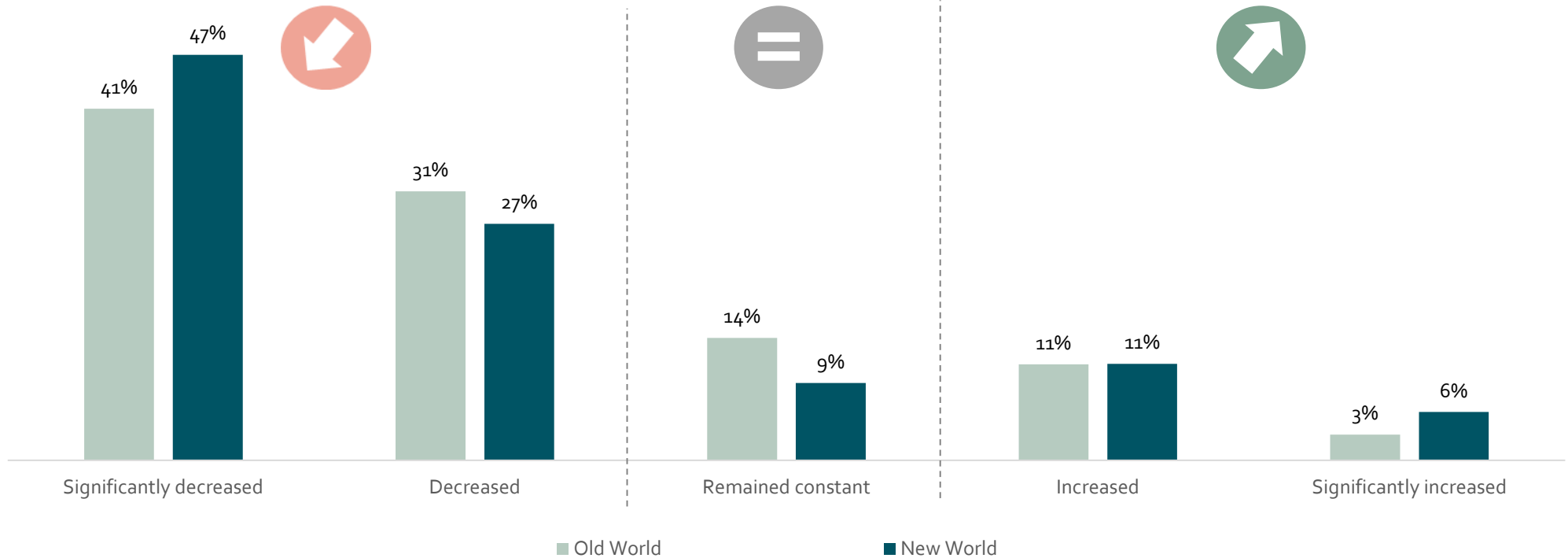
(All wineries; N=1,423; in %)



- 68% of Spanish wineries have significantly decreased visitor numbers compared to the previous year.
- German wineries recorded the lowest decreases in terms of visitor numbers. 29 % even recorded more visitors than the previous year – it was especially after the first lockdown, when tourists were allowed to buy wine again directly from the winery. Also the long-lasting summer in 2020 helped compensate or even exceed the level of 2019 regarding number of tourists.
- Generally, every wine-growing country noticed a drop of visitors as a result of Covid-19.

Number of winery visitors compared to 2019 by OW/NW

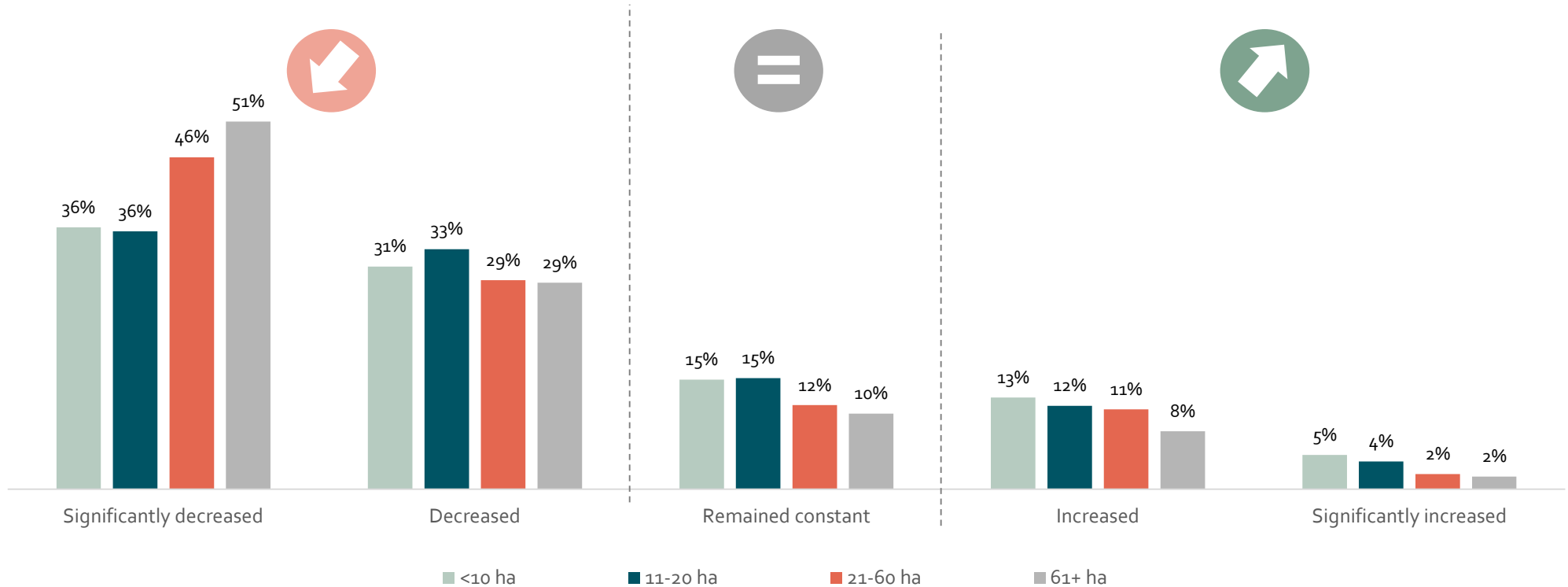
(All wineries; N=1,423; in %)



- When considering the Old and New World, there were no strong differences to be observed.
- 72 % of the Old World and 74 % of the New World wineries had a significantly decrease.
- Only 14 % of the Old World and 17 % of the New World wineries could increase the number of visitors.

Number of winery visitors compared to 2019 by size

(All wineries; N=1,423; in %)



- The large wineries (21-60 ha and 61 + ha) lost the highest number of customers compared to the previous year.

Chapter 3

RESULTS

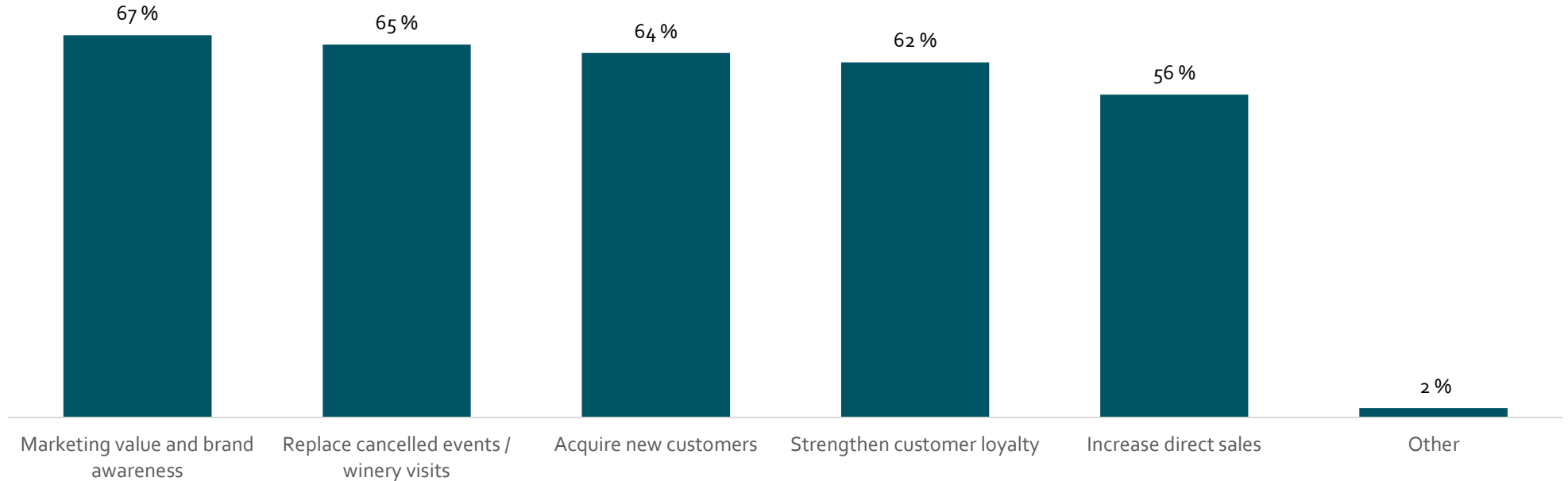
WINERIES WITH ONLINE WINE TASTING

Chapter 3.1

REASONS FOR OFFERING ONLINE WINE TASTINGS

Reasons for offering online wine tastings

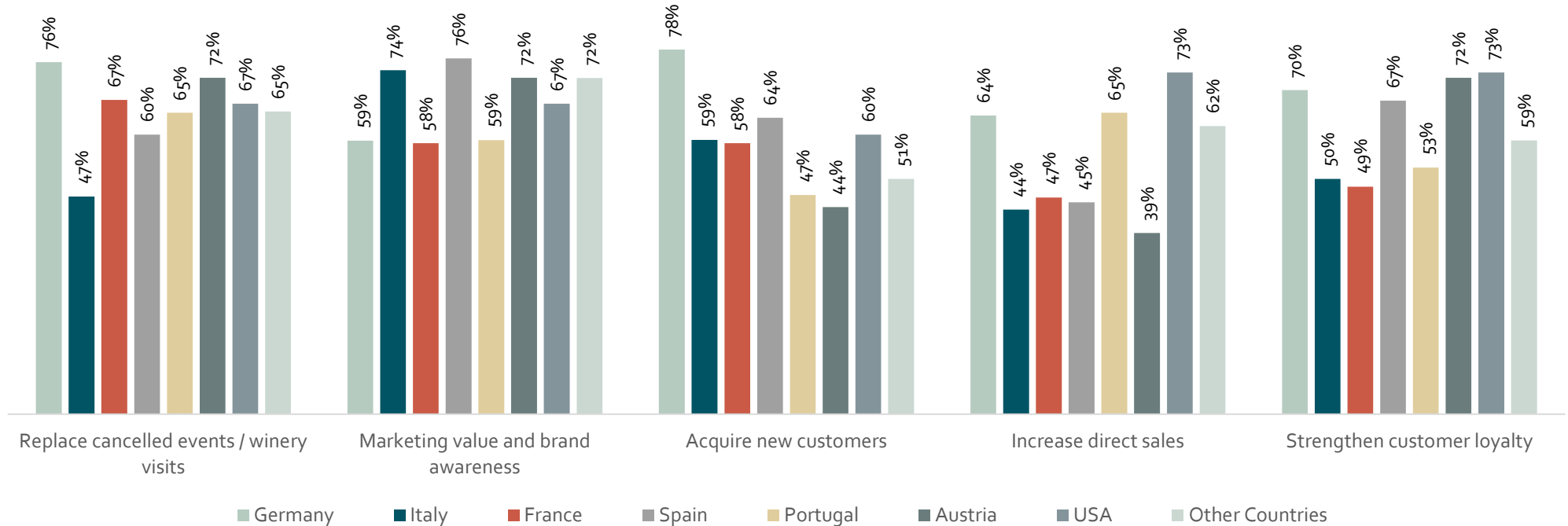
(Wineries with OWT; N=551; in %)



- The top reason for offering online wine tastings was to create marketing value and increase brand awareness (67%). This was shortly followed by replacing cancelled events / winery visits (65%) and trying to attract new customers (64%).
- Besides this, wineries aimed to strengthen the loyalty of their existing customers (62%) and increase direct sales (56%).
- Interestingly, all of the response options offered seemed to be quite important – thus, online wine tasting seems to be able to serve several aims of the winery.

Reasons for offering online wine tastings by country

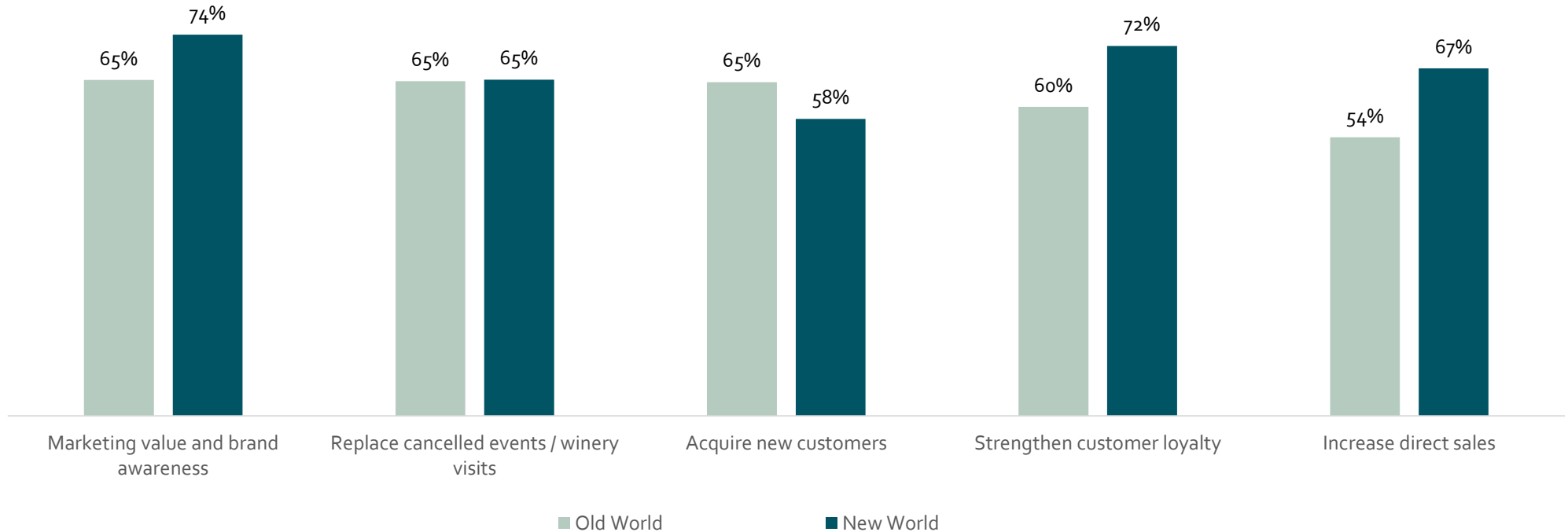
(Wineries with OWT; N=551; in %)



- The main reasons for German wineries were replacing cancelled events (76 %), acquire new customers (78 %) and to strength customer loyalty (70 %).
- For Spanish wineries increasing their marketing value and brand awareness (76 %) was the most important.
- There are significant differences in terms of increase direct sales. German, Portuguese and US wineries also mentioned this among the first reasons.

Reasons for offering online wine tastings by OW/NW

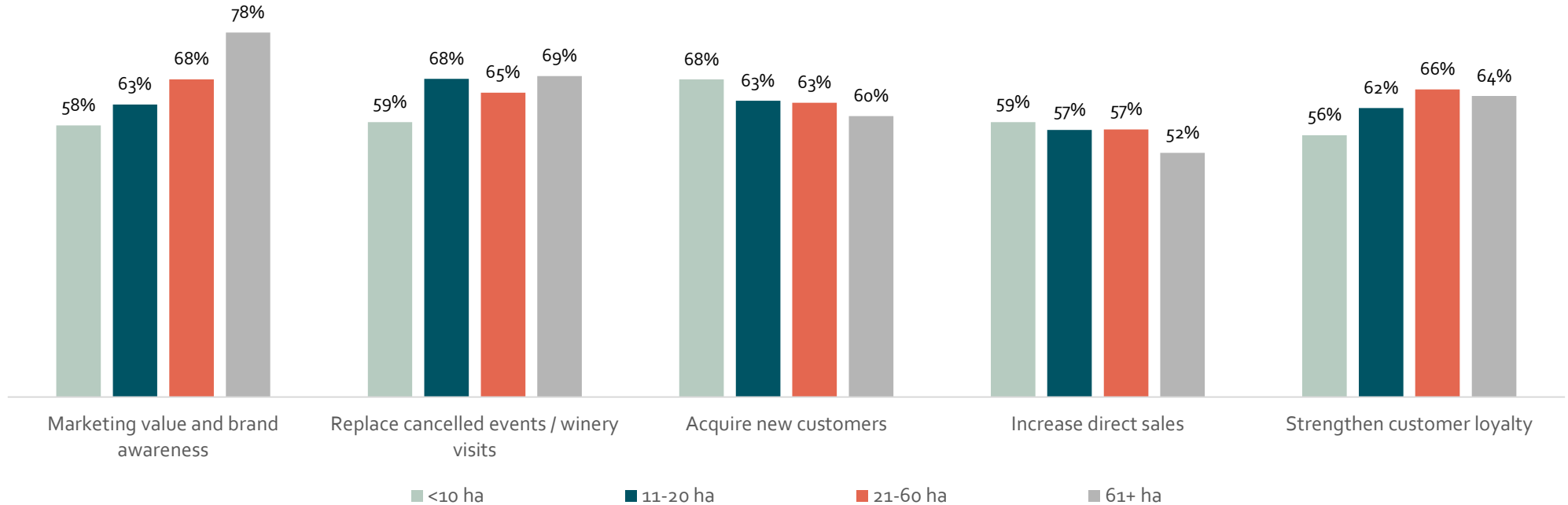
(Wineries with OWT; N=551; in %)



- New World wineries wanted to enhance their brand (74 %), improve customer loyalty (72 %) and increase direct sales (67 %).
- Old World wineries decided on the following reasons: acquire new customers (65 %), replace cancelled events (65 %) and marketing value and brand awareness (65 %).

Reasons for offering online wine tastings by size

(Wineries with OWT; N=551; in %)



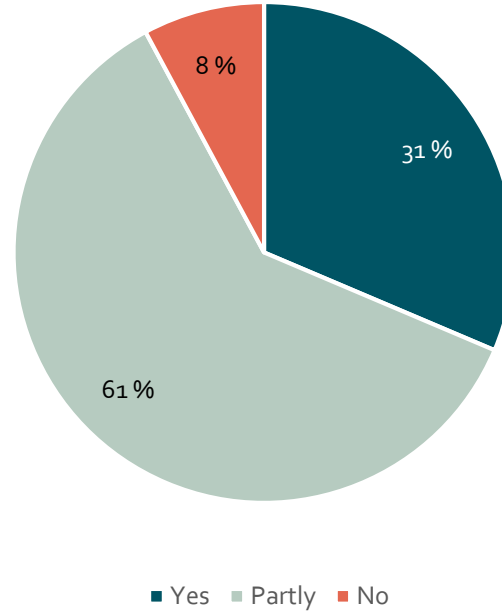
- Regardless of the size of the winery, all answers reached at least 50%.
- Small wineries mainly offered online wine tastings in order to acquire new customers (68 % and 63 %) and to replace cancelled events (59 % and 68 %).
- Larger wineries mainly wanted to increase their marketing value and brand awareness (78 %).

Chapter 3.2

SUCCESS OF THE ONLINE WINE TASTINGS

Success of the online wine tastings

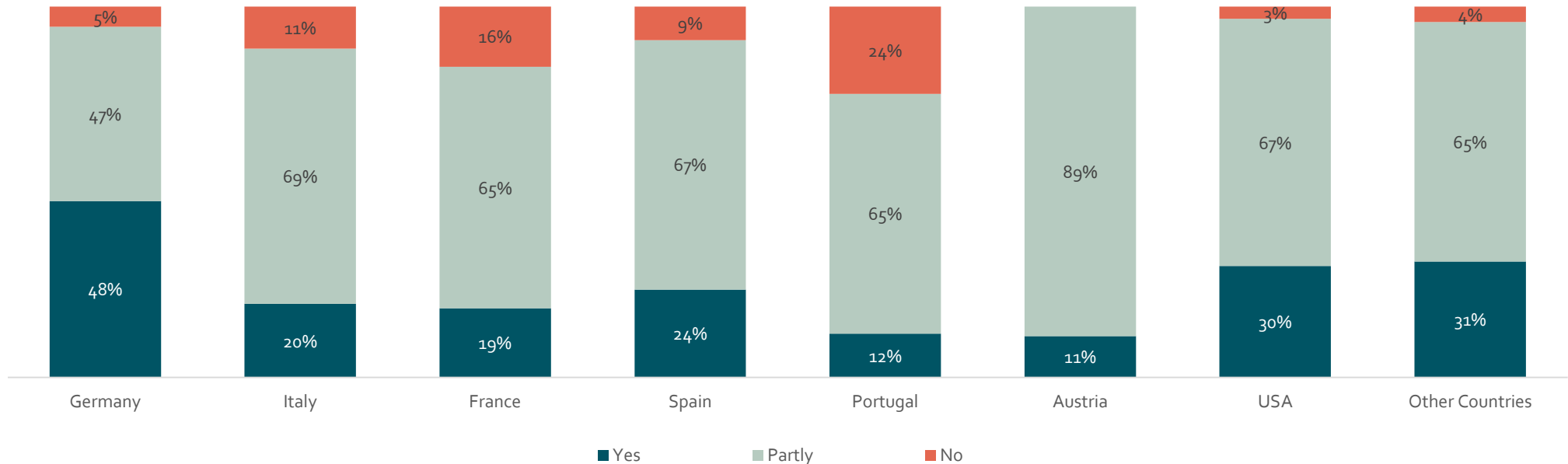
(Wineries with OWT; N=551; in %)



- About one-third of the wineries surveyed (31%) were successful in achieving their goals, while 61% felt that their goals were partly achieved. Online wine tastings are therefore a useful tool for countering the Covid19-19 crisis.
- Only 9% of the wineries were not satisfied with the outcome.

Success of the online wine tastings by country

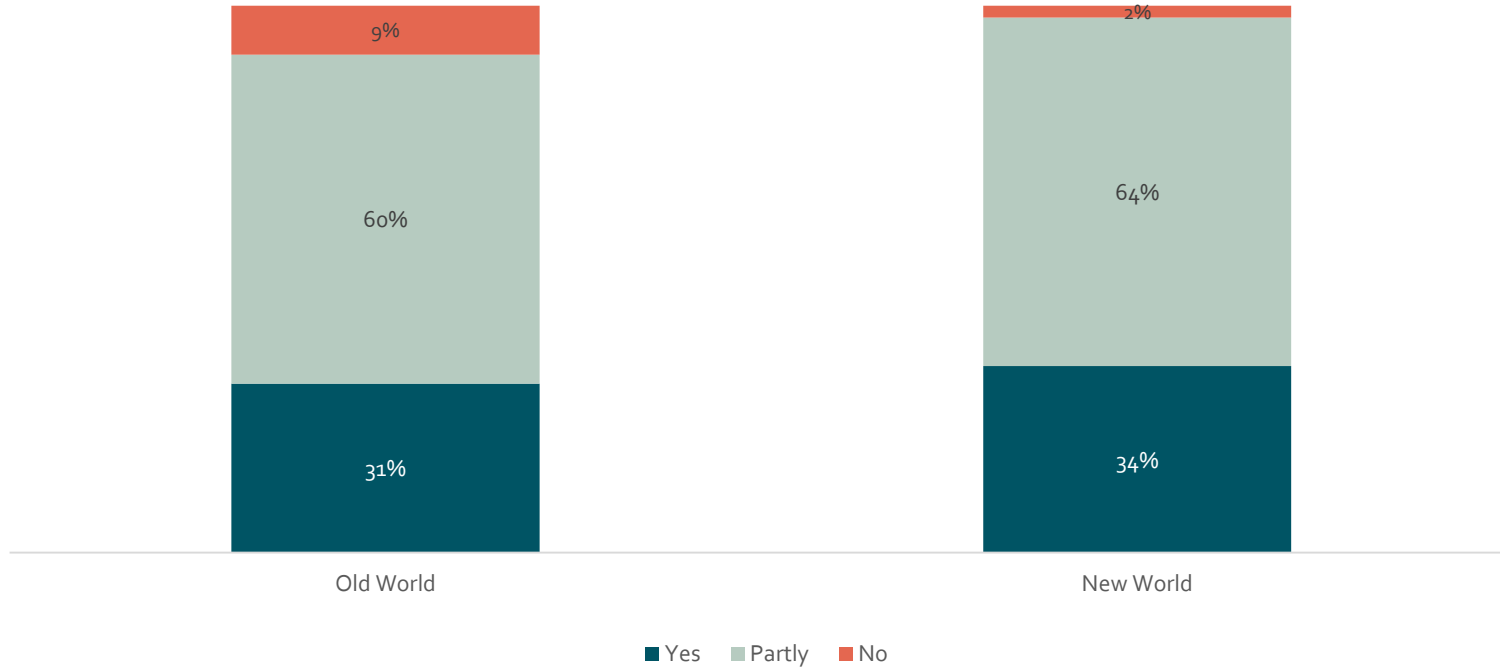
(Wineries with OWT; N=551; in %)



- Wineries from France (16 %) and Portugal (24 %) stated the lowest success rate of online wine tastings.
- Austria is the only country where no winery could report negative aspects of the online wine tastings.
- In Germany (48 %) and the USA (3 %), most wineries were able to achieve their targets. Only a few wineries could not achieve their goals (5 % and 3%).

Success of the online wine tastings by OW/NW

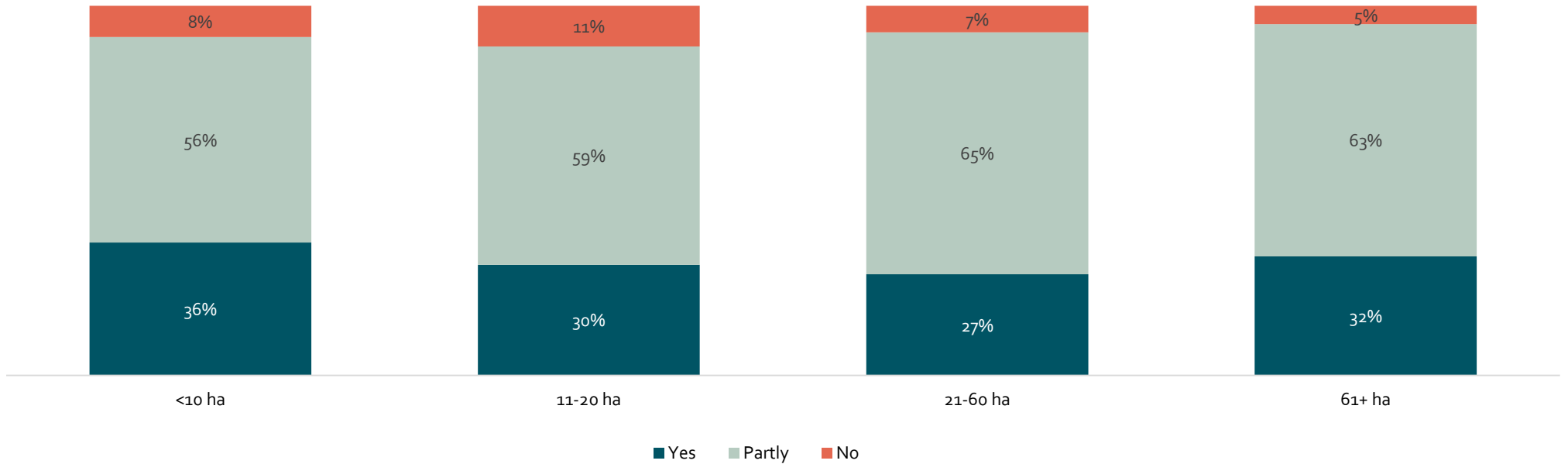
(Wineries with OWT; N=551; in %)



- Overall, the New World wineries were more successful in pursuing their goals.
- Only 9% of Old World wineries and 2% of New World wineries did not manage to reach their targets.

Success of the online wine tastings by size

(Wineries with OWT; N=551; in %)



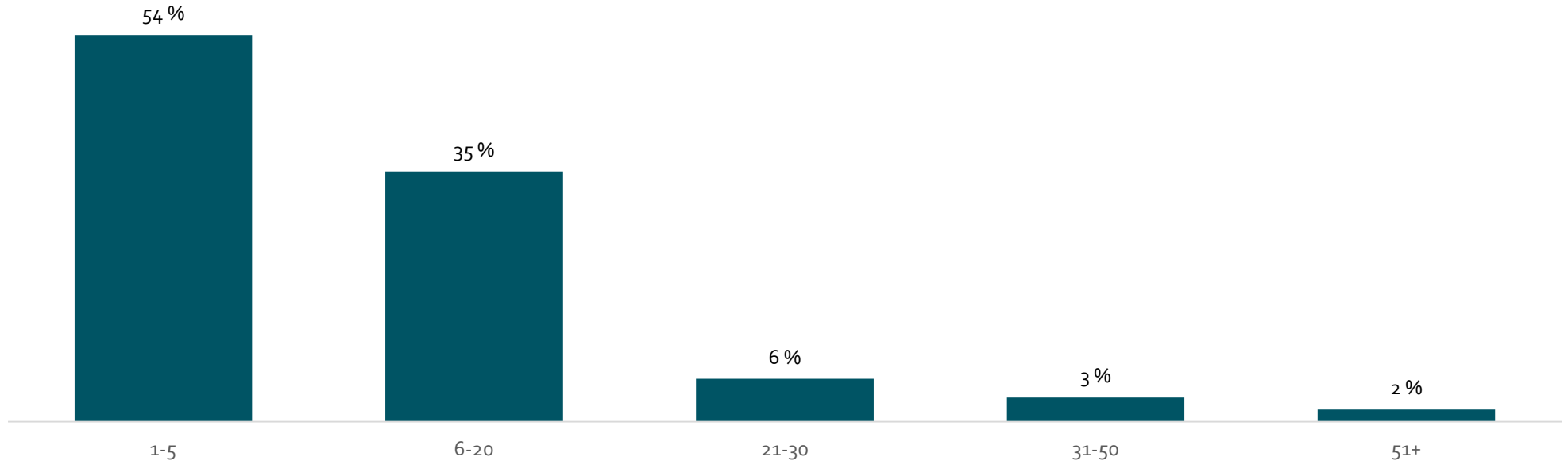
- The size of the winery does not play a significant role when it comes to the success of online wine tastings.

Chapter 3.3

NUMBER OF ONLINE WINE TASTINGS IN 2020

Number of online wine tastings in 2020

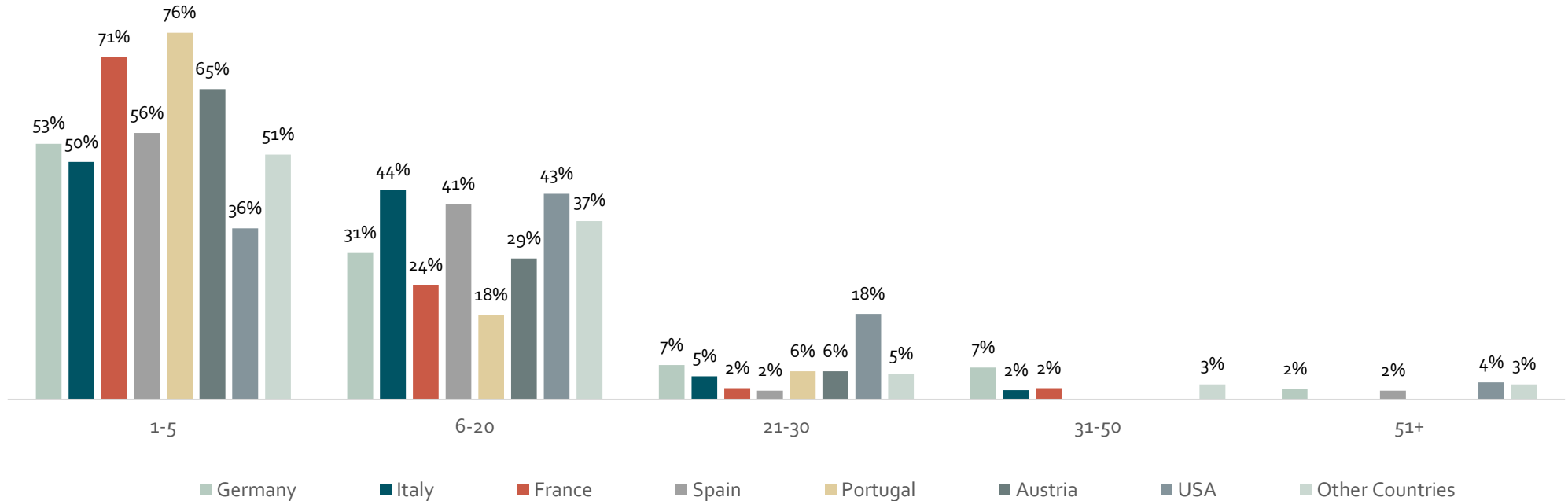
(Wineries with OWT; N=551; in %)



- Less than the half of the wineries (54%) hosted less than 6 online wine tastings in 2020. Another third (35%) hosted 6-20 online wine tastings. Therefore, at 89%, most of the wineries hosted between 1 and 20 online wine tastings in 2020.
- Of the wineries surveyed, 2 % hosted more than 50 online wine tastings.

Number of online wine tastings in 2020 by country

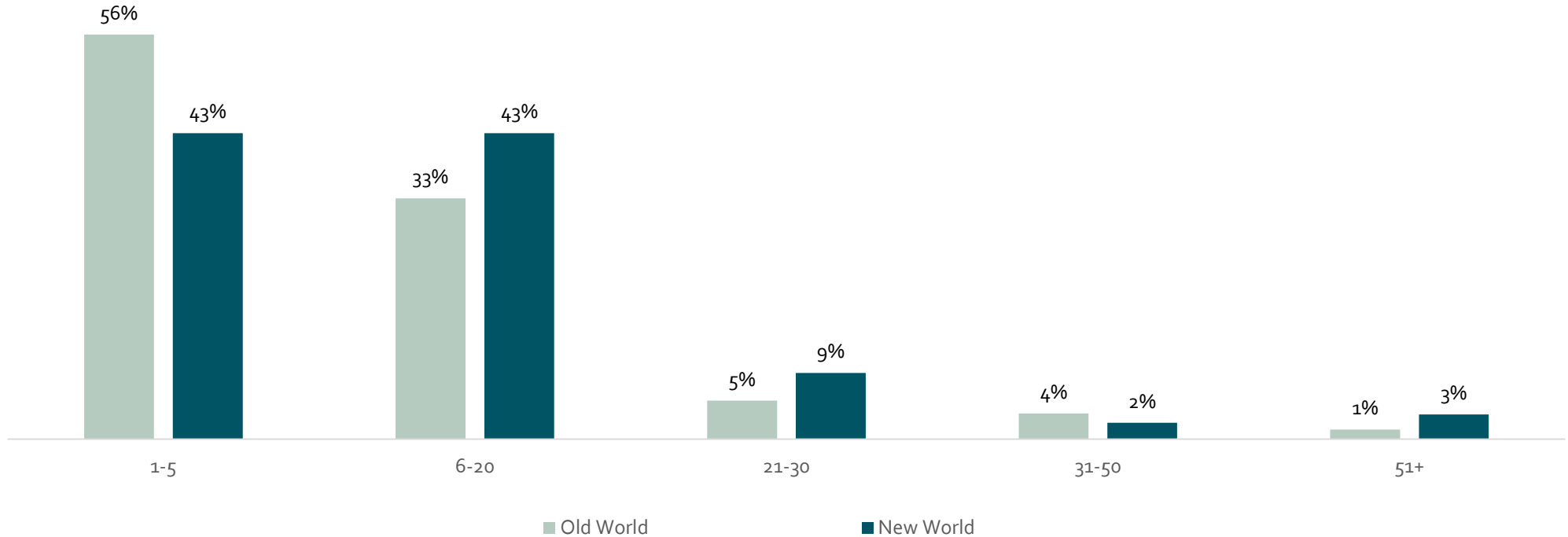
(Wineries with OWT; N=551; in %)



- Only in the USA (4 %), Germany (2 %) and Spain (2 %) had wineries that hosted more than 50 online wine tastings.
- In Portugal and Austria no winery hosted more than 30 online wine tastings.

Number of online wine tastings in 2020 by OW/NW

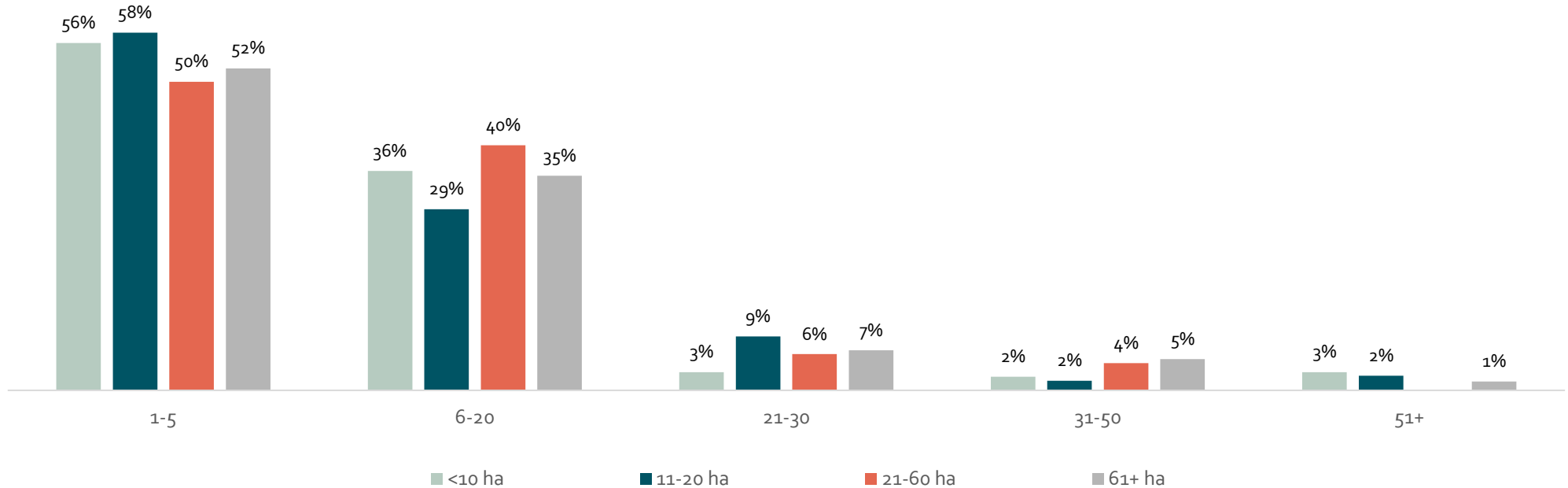
(Wineries with OWT; N=551; in %)



- On average, the New World wineries offered more online wine tastings than the Old World wineries.
- 56% of the Old World wineries hosted less than 6 online wine tastings

Number of online wine tastings in 2020 by size

(Wineries with OWT; N=551; in %)



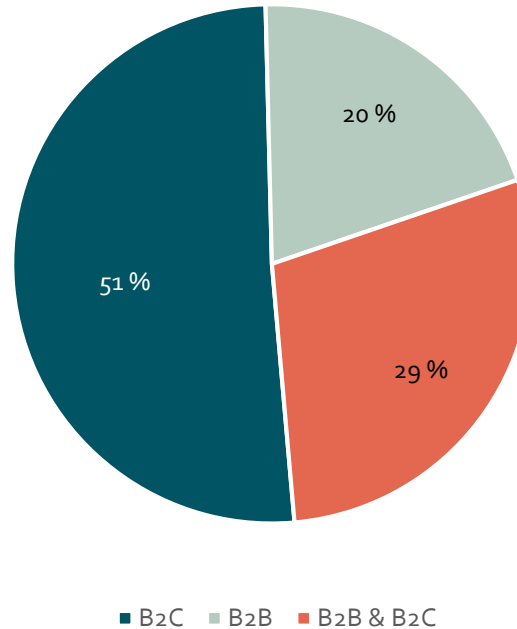
- With regard to the size of the wineries, there was not a big difference in terms of the number of online wine tastings.
- Most wineries hosted less than 6 online wine tastings (all over 50 %).

Chapter 3.4

MAIN TARGET GROUP FOR ONLINE WINE TASTINGS

Main target group for online wine tastings

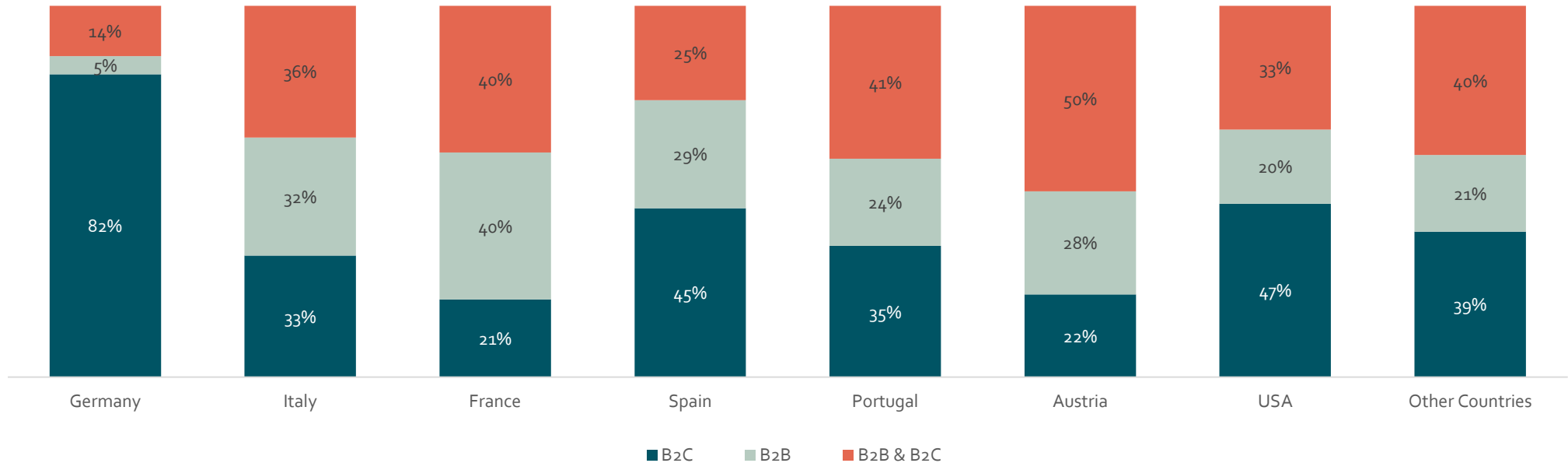
(Wineries with OWT; N=551; in %)



- Most of the online wine tastings were meant to target mainly private clients (51%). Every 5th wine tasting was exclusively for business partners (20%). Another 29% were offered both for consumers and for business partners.
- This shows that online wine tastings are not only interesting for private but also for business customers.

Main target group for online wine tastings by country

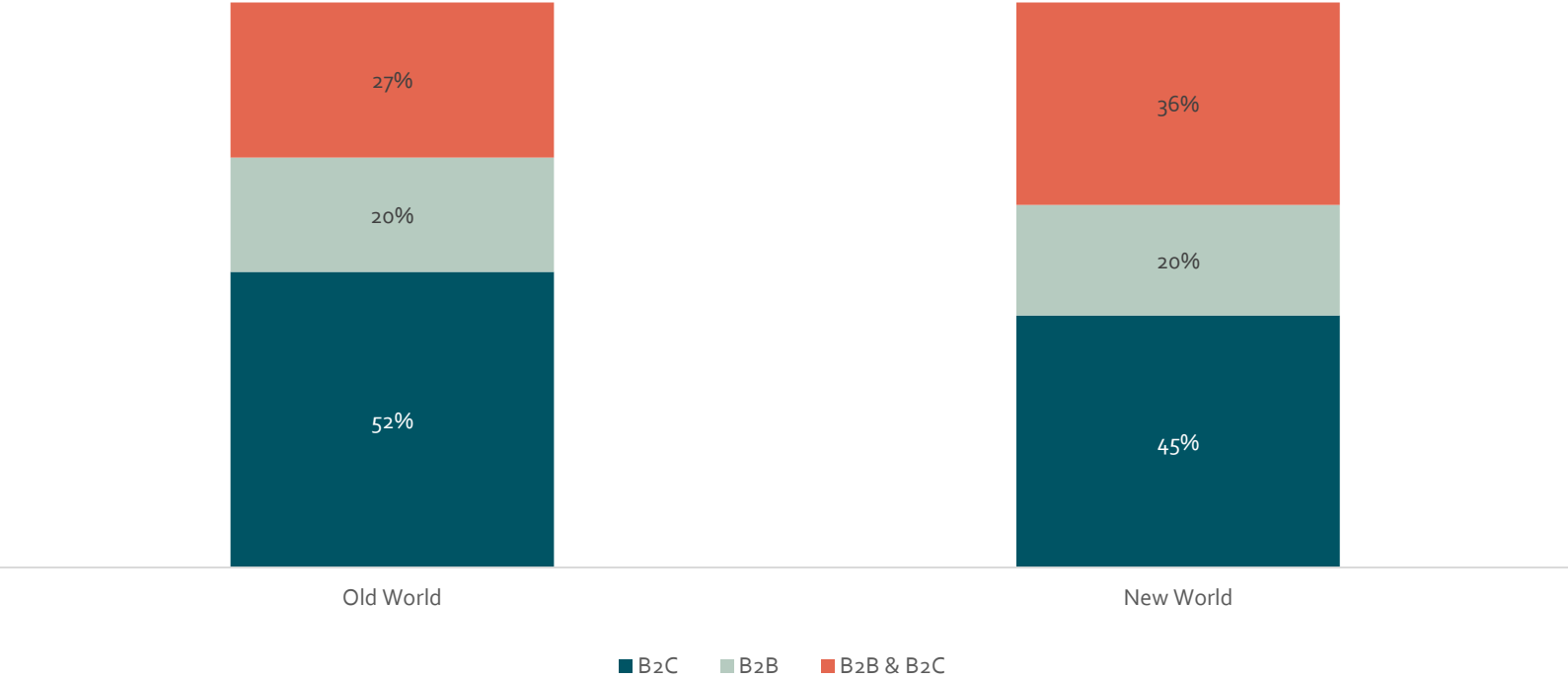
(Wineries with OWT; N=551; in %)



- 82% of the wineries in Germany exclusively hosted online wine tastings for private clients.
- In France, 40% of wineries organized online wine tastings exclusively for business partners.
- Austria and France hosted a high proportion of B2B or combined B2B and B2C tastings.

Main target group for online wine tastings by OW/NW

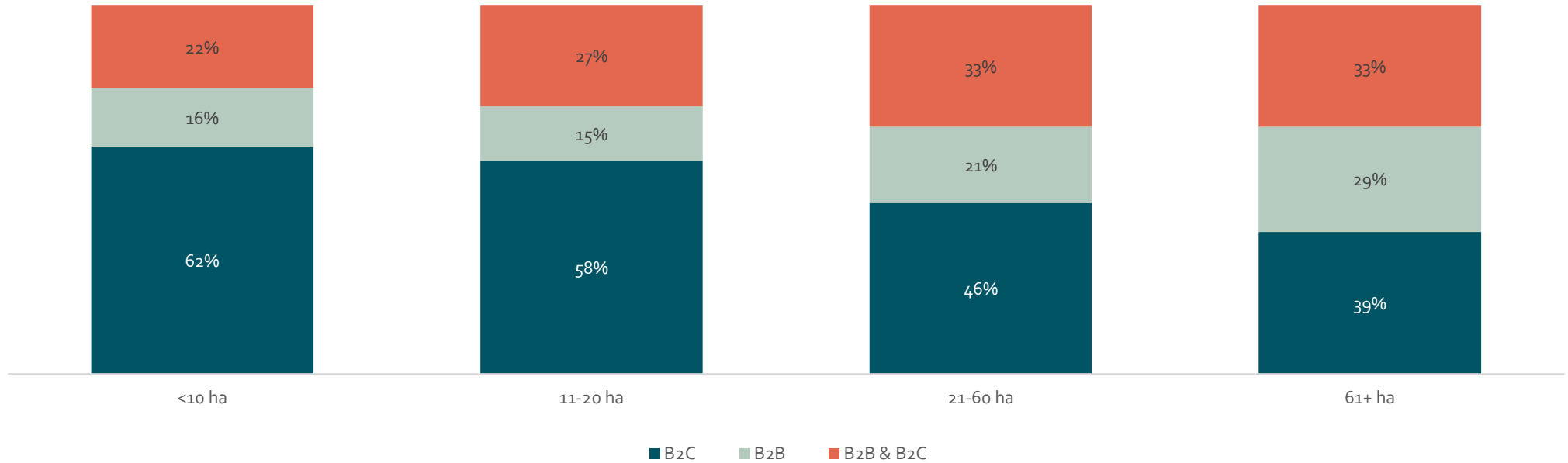
(Wineries with OWT; N=551; in %)



- Compared to the Old World countries, the New World countries conducted more online wine tastings for business partners than for private customers

Main target group for online wine tastings by size

(Wineries with OWT; N=551; in %)



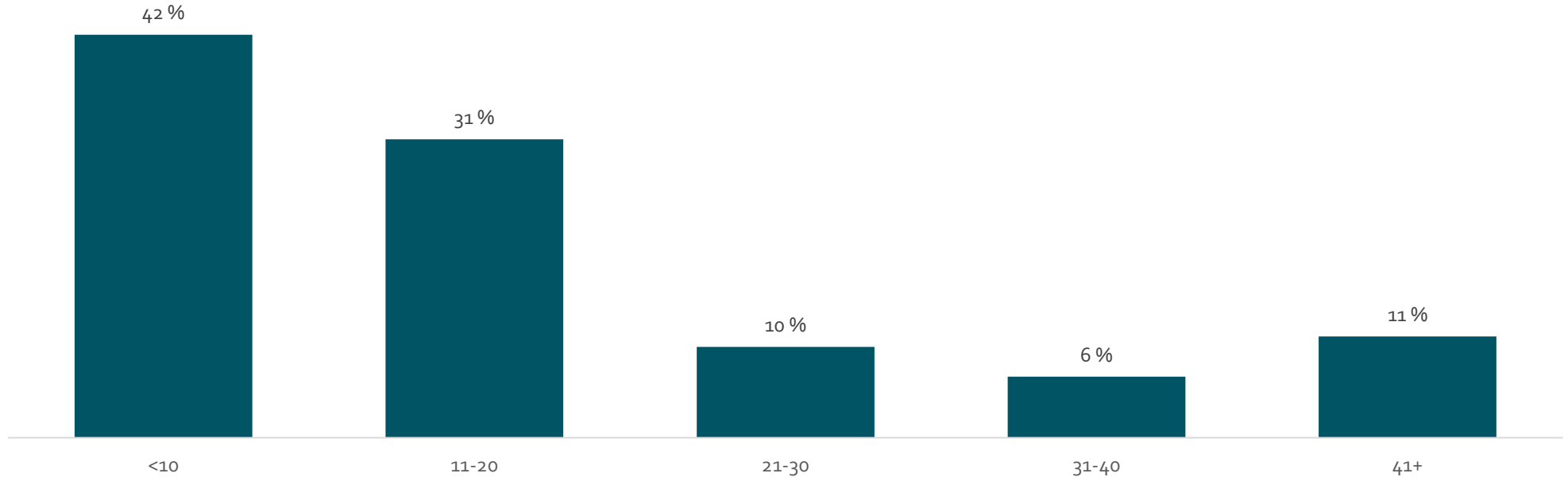
- Only the wineries with more than 61 hectares hosted online wine tastings in almost equal numbers in the B2C (39 %) and B2B (33 %) field.
- All wineries of all sizes organized online wine tastings for all target groups.

Chapter 3.5

AVERAGE NUMBER OF PARTICIPANTS PER TASTING

Average number of participants per tasting

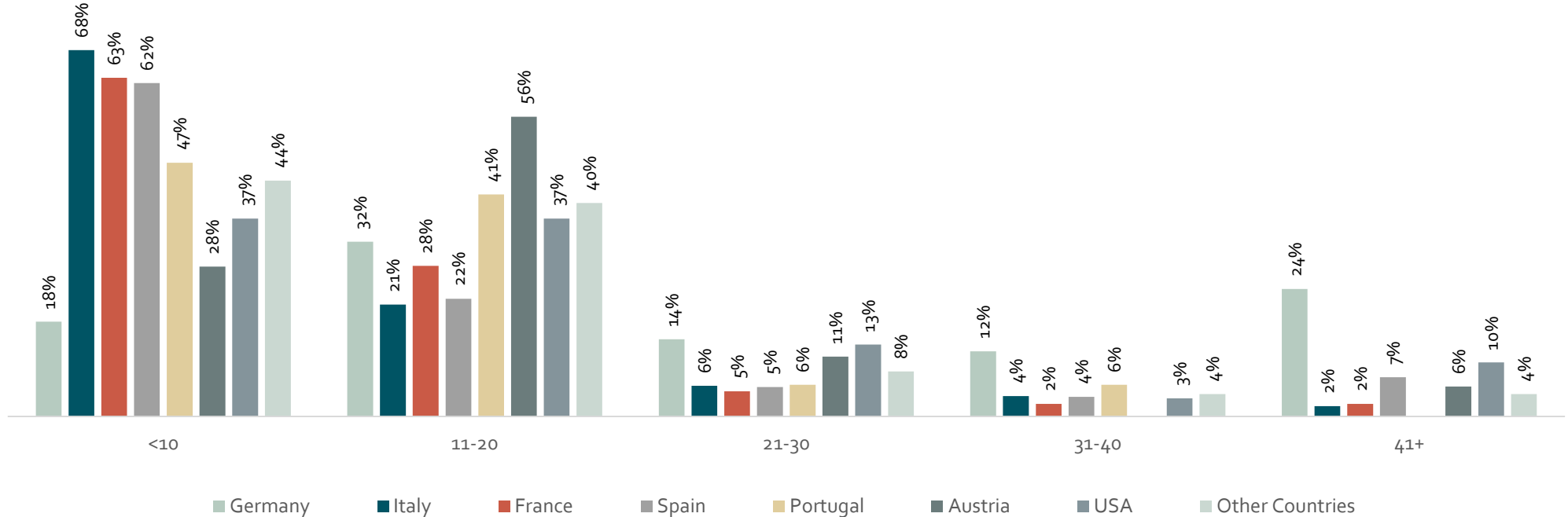
(Wineries with OWT; N=551; in %)



- The number of participants varies greatly from winery to winery.
- Around three-quarters of the online wine tastings (73%) were held with less than 20 people. Most online wine tastings were hosted even with less than 10 participants (42%).
- Only 11% of wineries had more than 40 participants at the online wine tastings they hosted.

Average number of participants per tasting by country

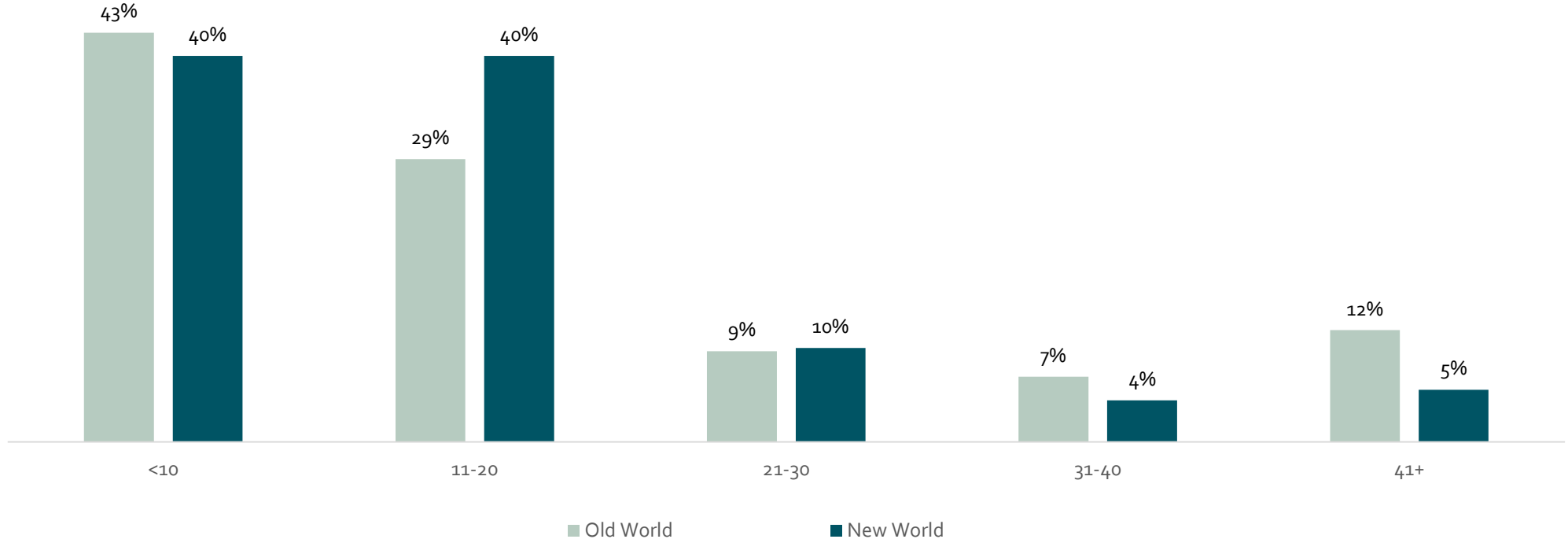
(Wineries with OWT; N=551; in %)



- 24% of the wineries in Germany organized online wine tastings with more than 41 participants.
- Italy (68%), France (63%) and Spain (62%) offered a relatively high proportion of online wine tastings with less than 11 participants.
- 56% of wineries in Austria hosted online wine tastings with 11-20 participants.

Average number of participants per tasting by OW/NW

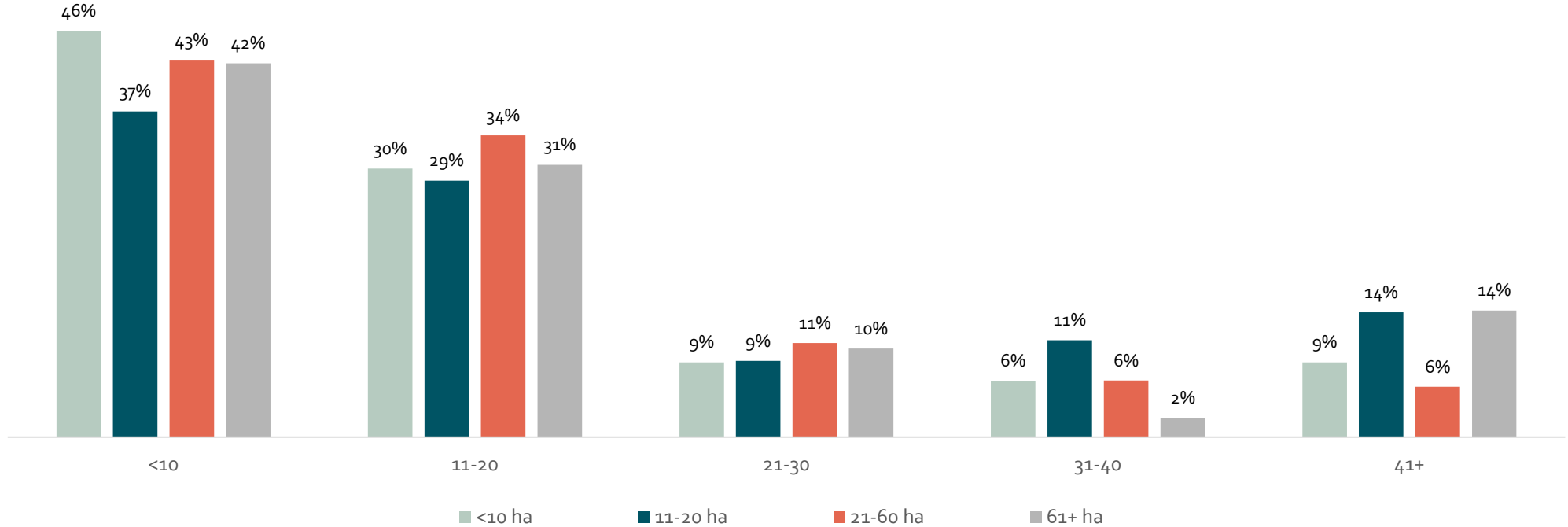
(Wineries with OWT; N=551; in %)



- 80% of wineries of New World organized online wine tastings with less than 21 participants.
- The Old World wineries organized online tasting with more participants (>30).

Average number of participants per tasting by size

(Wineries with OWT; N=551; in %)



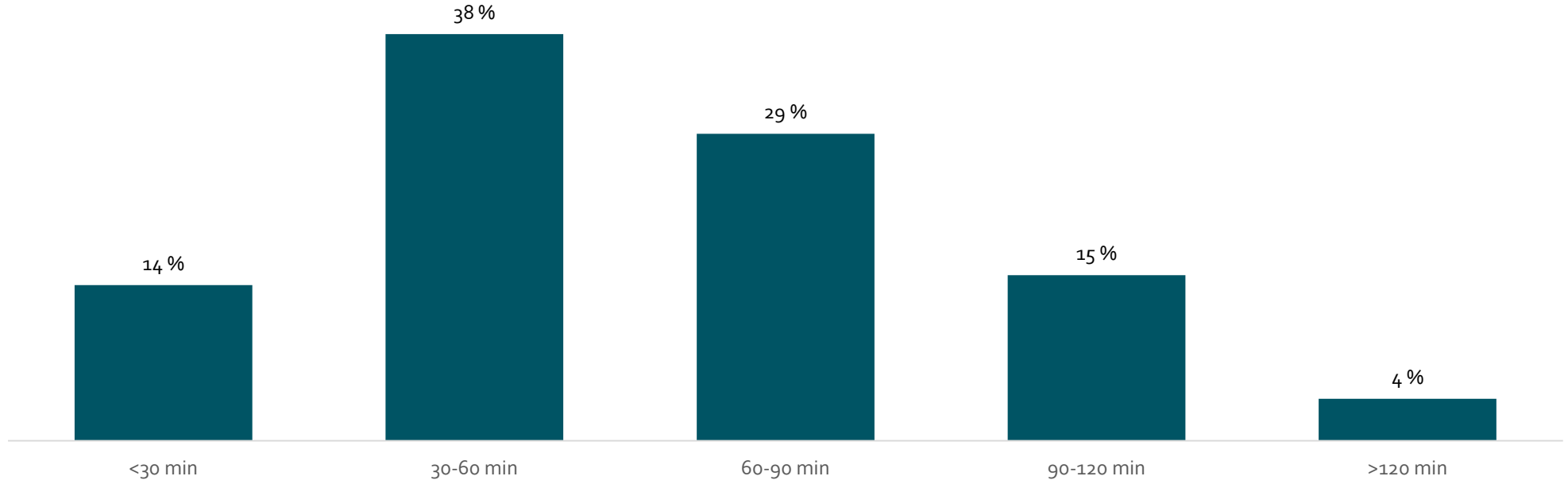
- The number of participants does not depend on the size of the establishment.

Chapter 3.6

AVERAGE LENGTH OF ONLINE WINE TASTINGS

Average length of online wine tastings

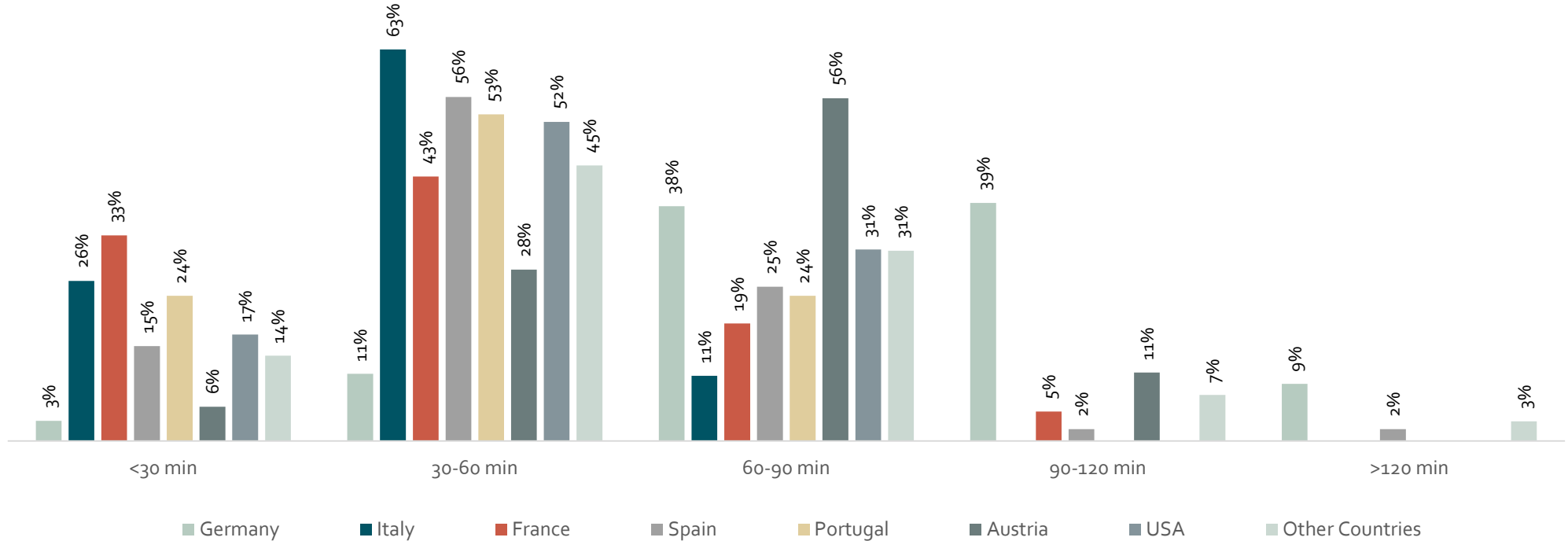
(Wineries with OWT; N=551; in %)



- Two thirds of all online wine tastings (67%) lasted between 30 and 90 minutes. 14% lasted less than 30 minutes, whereas the remaining 19% took longer than 90 minutes.
- Of course, the length of the wine tasting depends on a number of factors, e.g. the number of tasted wines, the number of participants and the host's structure for the tasting.

Average length of online wine tastings by country

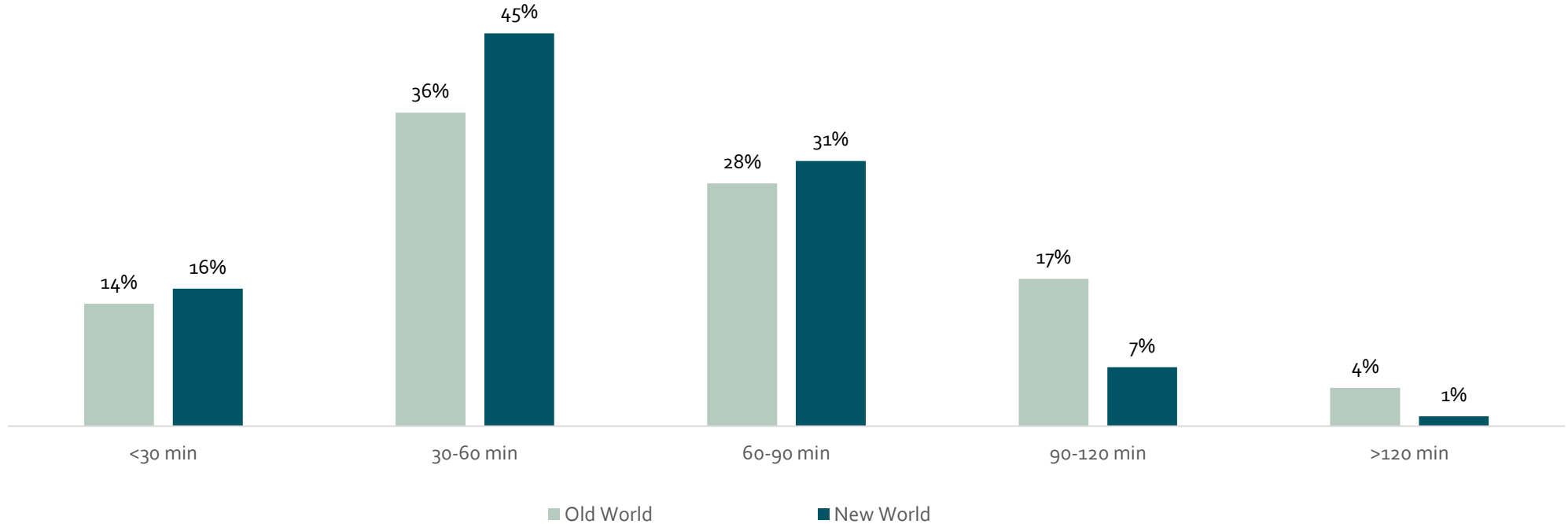
(Wineries with OWT; N=551; in %)



- German wineries held the longest online wine tastings; 48% of online wine tastings are longer than 90 min.
- Most countries hosted online wine tastings with a length of 30 - 90 min.
- 89% of Italian wine tastings were 60 minutes or shorter.

Average length of online wine tastings by OW/NW

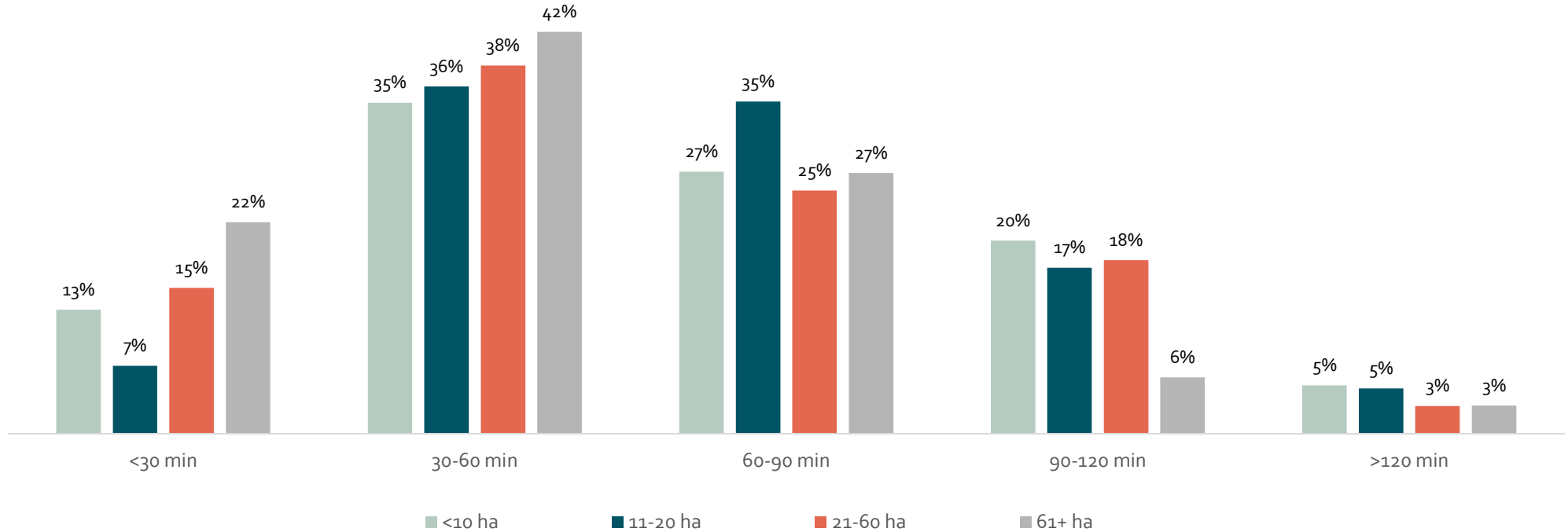
(Wineries with OWT; N=551; in %)



- The Old World wineries hosted longer online wine tastings than wineries from the New World.
- 61% of the wineries in the New World hosted online wine tastings of less than 60 minutes duration.

Average length of online wine tastings by size

(Wineries with OWT; N=551; in %)



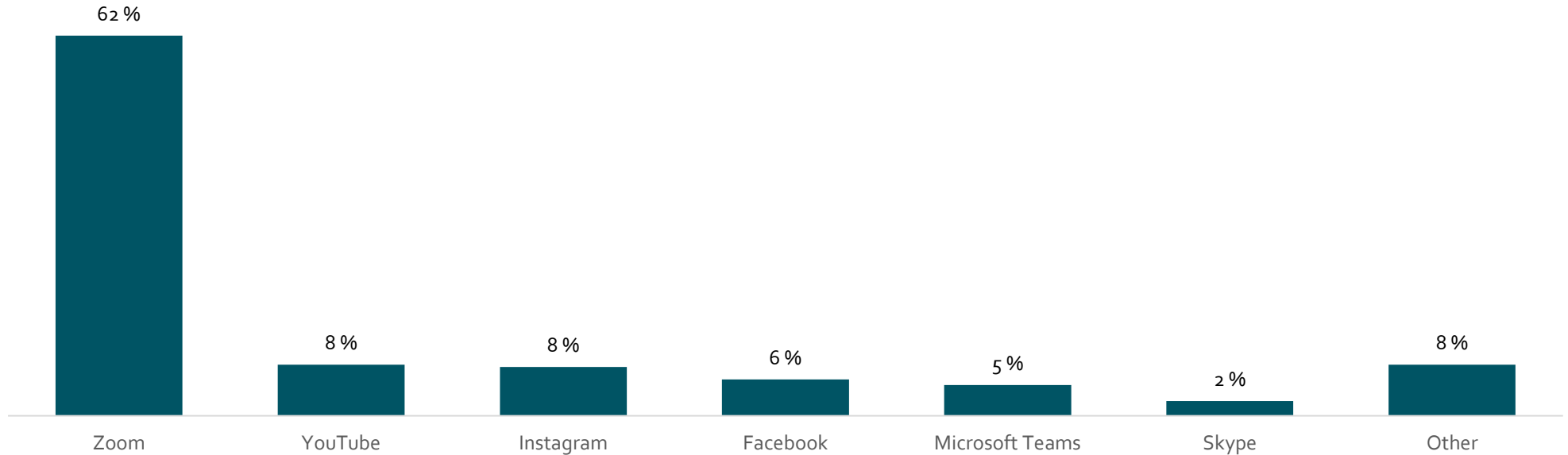
- Larger wineries offered shorter online sessions than smaller ones.

Chapter 3.7

PLATFORMS USED FOR ONLINE WINE TASTINGS

Platforms used for online wine tastings

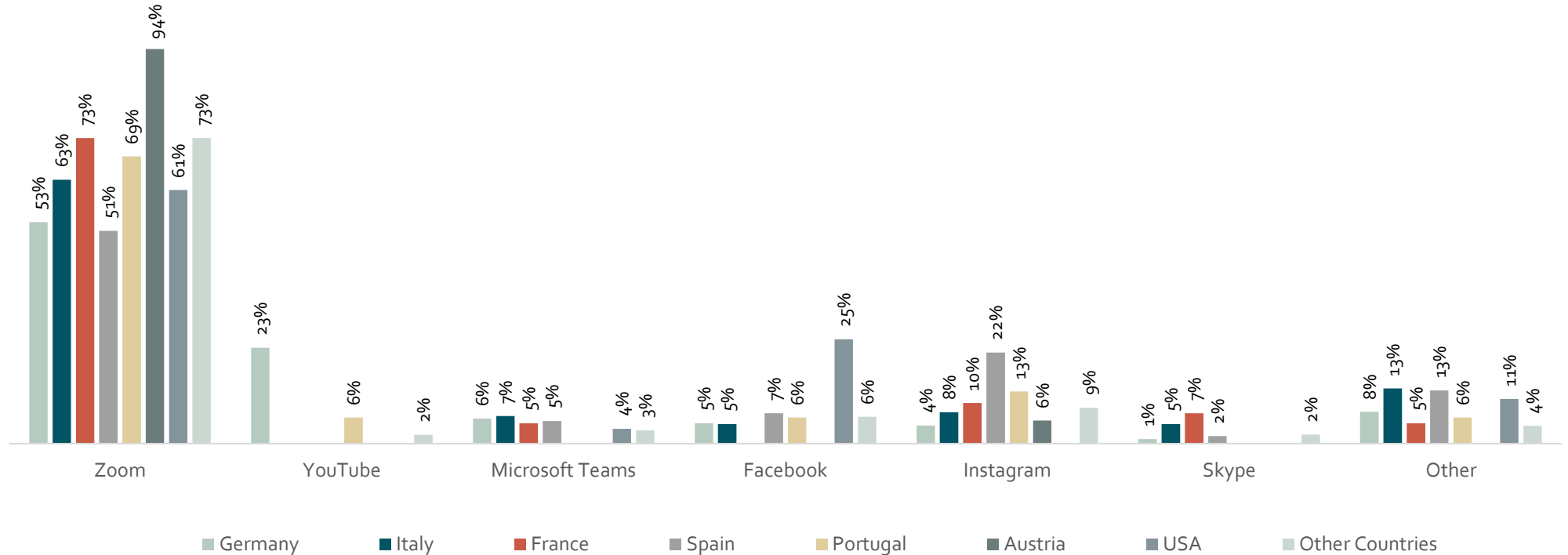
(Wineries with OWT; N=551; in %)



- Most wineries (62%) chose Zoom as the main platform for conducting their online wine tastings.
- Other platforms play a rather subordinate role.

Platforms used for online wine tastings by country

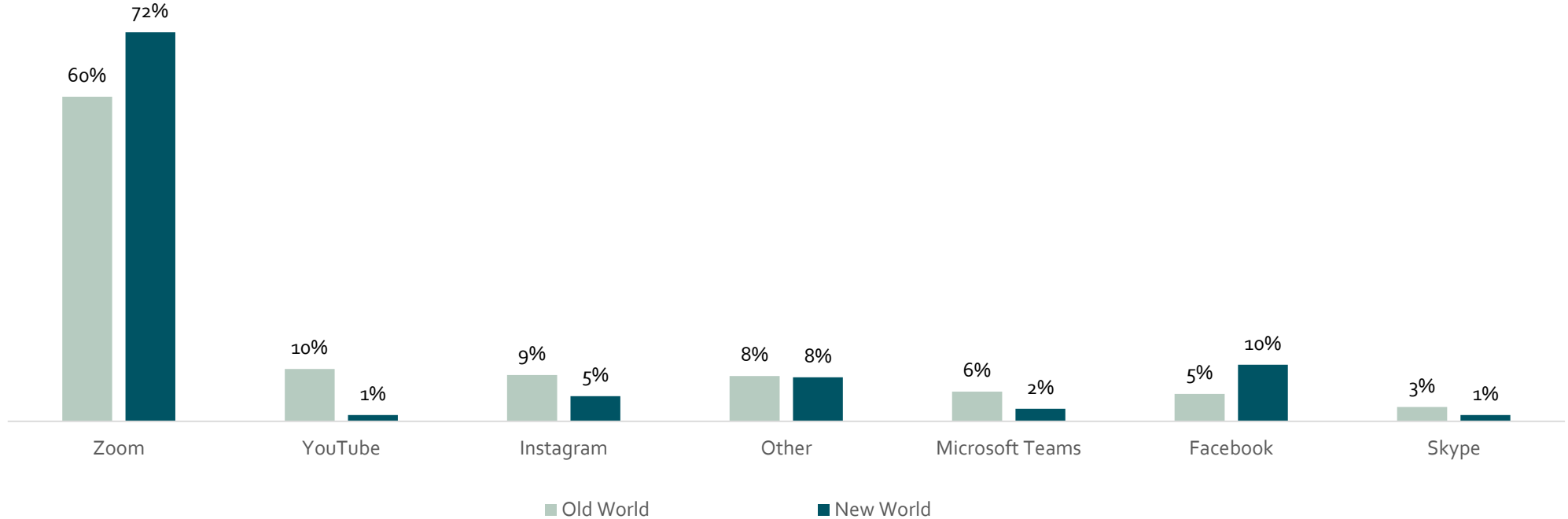
(Wineries with OWT; N=551; in %)



- Most wineries all over the world chose Zoom as their main platform for conducting online wine tastings. In Austria over 94 % of the wineries used Zoom.
- In Germany, a quarter of wineries used YouTube for their online wine tastings.
- In the USA, a quarter of wineries used Facebook and in Spain 22 % used Instagram for their online wine tastings.

Platforms used for online wine tastings by OW/NW

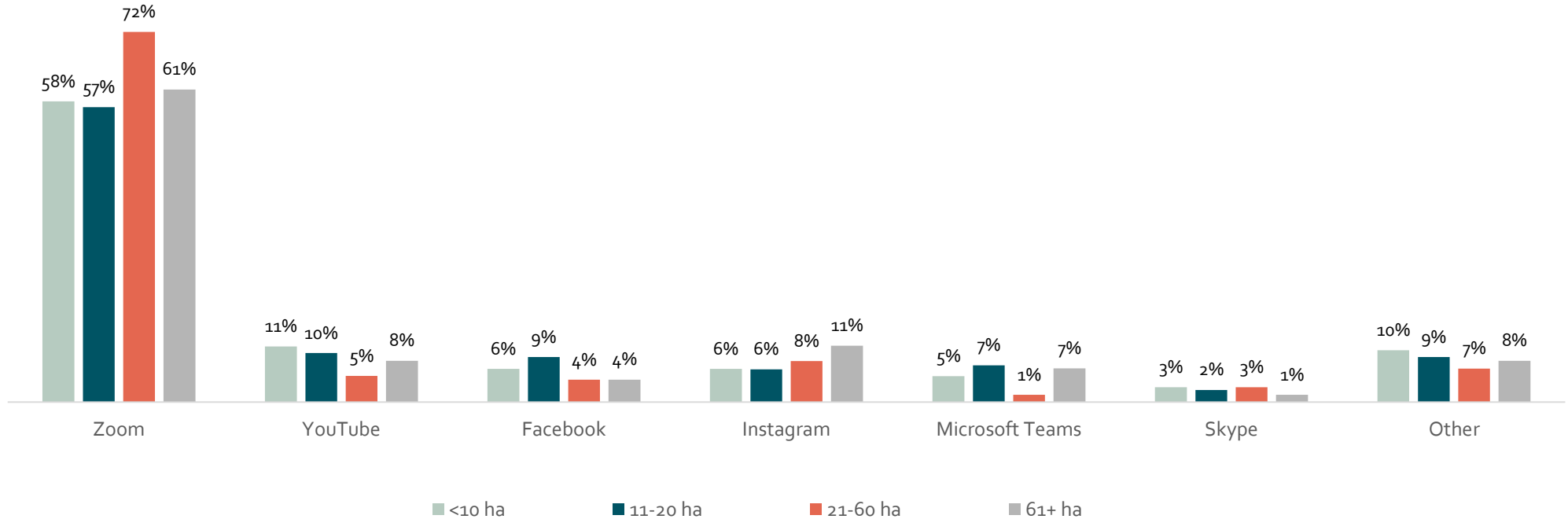
(Wineries with OWT; N=551; in %)



- A higher share of New World wineries used Zoom, while Old World countries streamed more frequently with Youtube and Instagram, relative to the New World.

Platforms used for online wine tastings by size

(Wineries with OWT; N=551; in %)



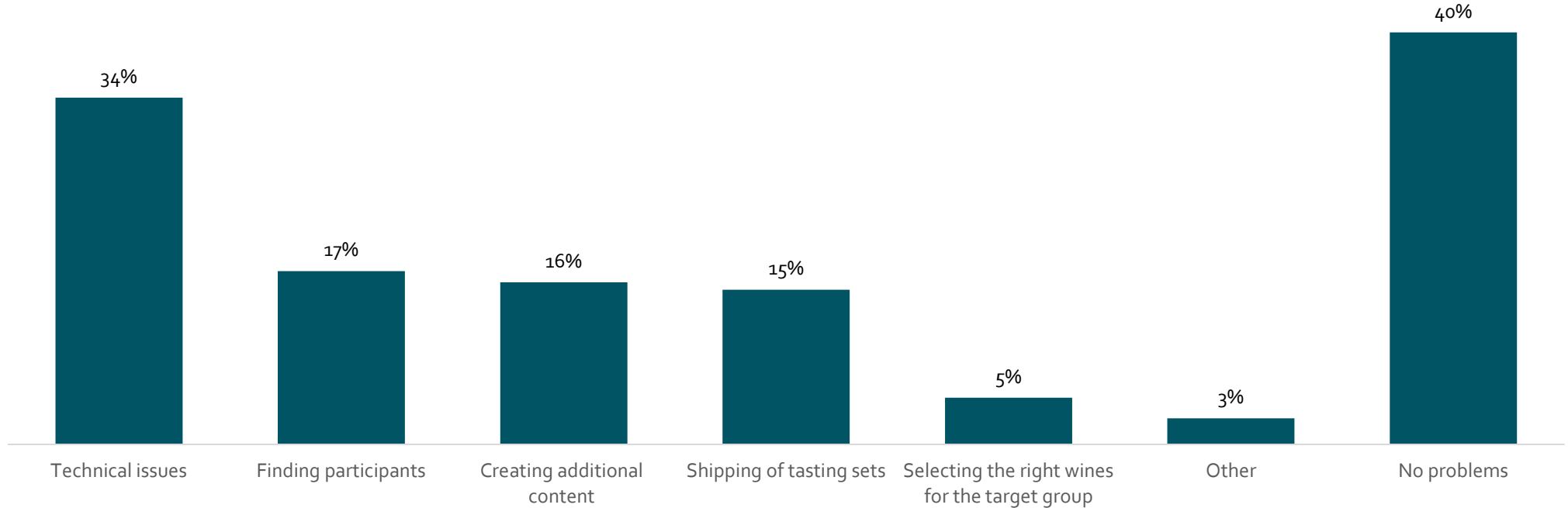
- Most wineries, regardless of size, chose Zoom as the main platform for conducting their online wine tastings.

Chapter 3.8

PROBLEMS WITH ONLINE WINE TASTINGS

Problems with online wine tastings

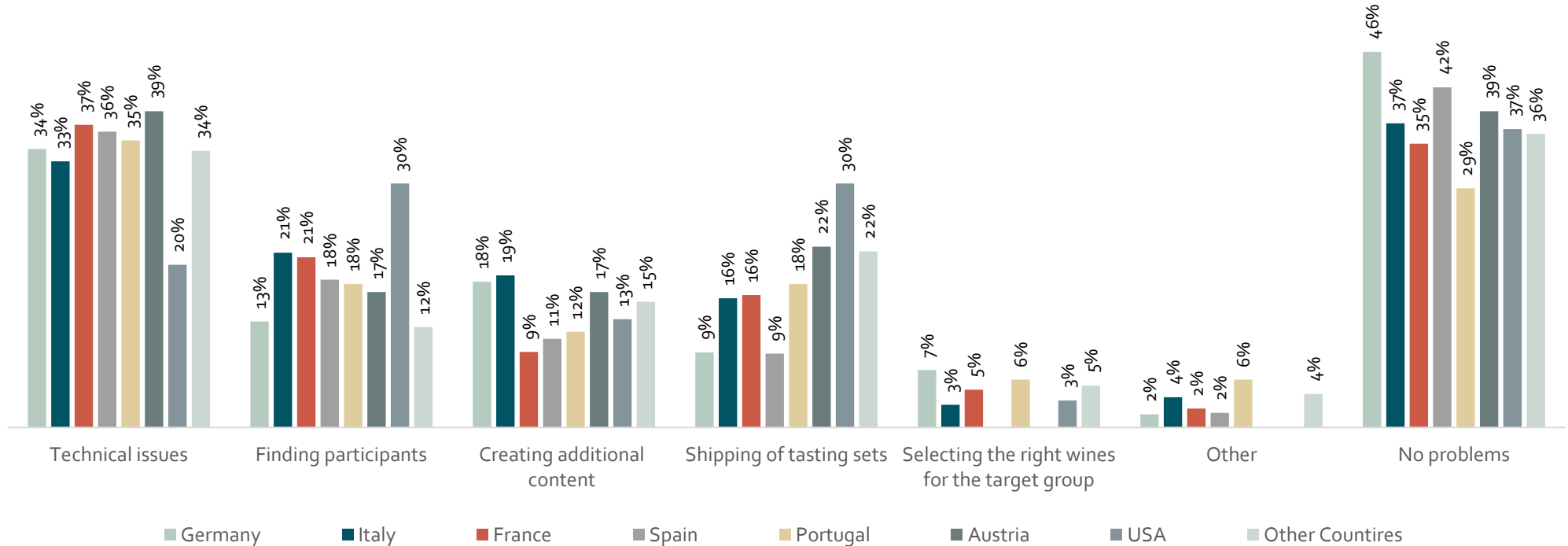
(Wineries with OWT; N=551; in %)



- Almost every second winery had no problems at all while organizing and holding an online wine tastings (40%).
- The biggest challenges in conducting online wine tastings were technical issues (34%) and finding participants (17%).
- It can therefore be concluded that hosting online wine tastings brings manageable challenges.

Problems with online wine tastings by country

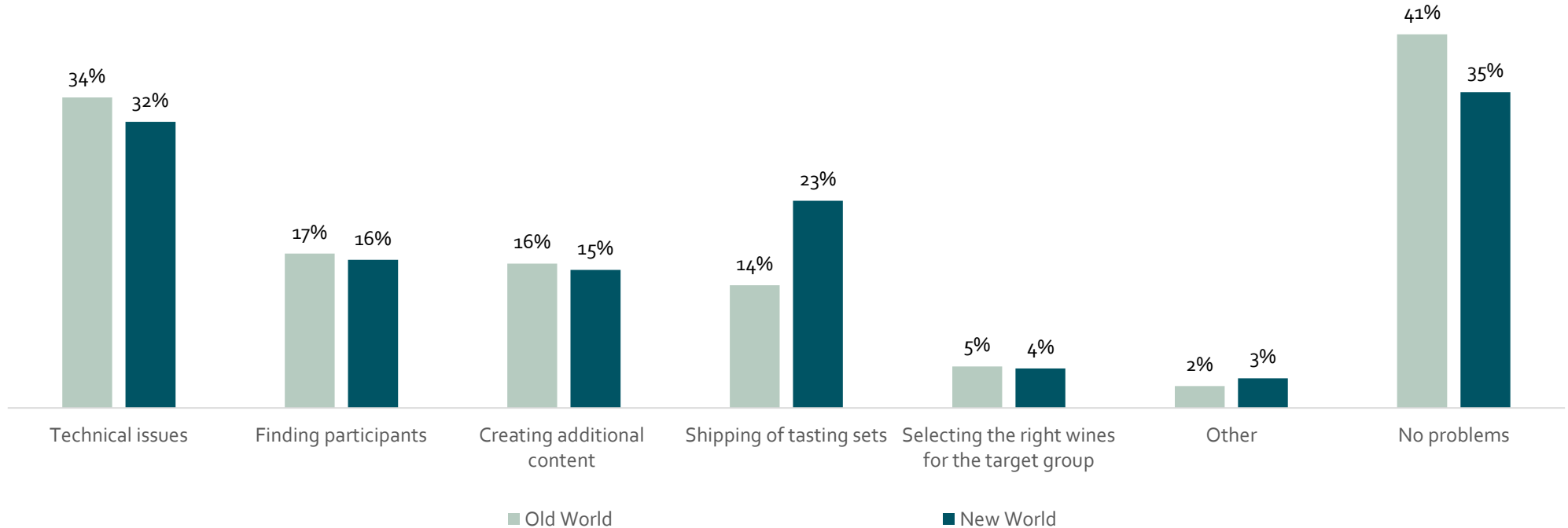
(Wineries with OWT; N=551; in %)



- Most countries had no problems and if they had problems, they were mainly technical issues – expect for the USA.
- In the USA, the main problem was not the technical part but finding participants and sending the tasting sets.

Problems with online wine tastings by OW/NW

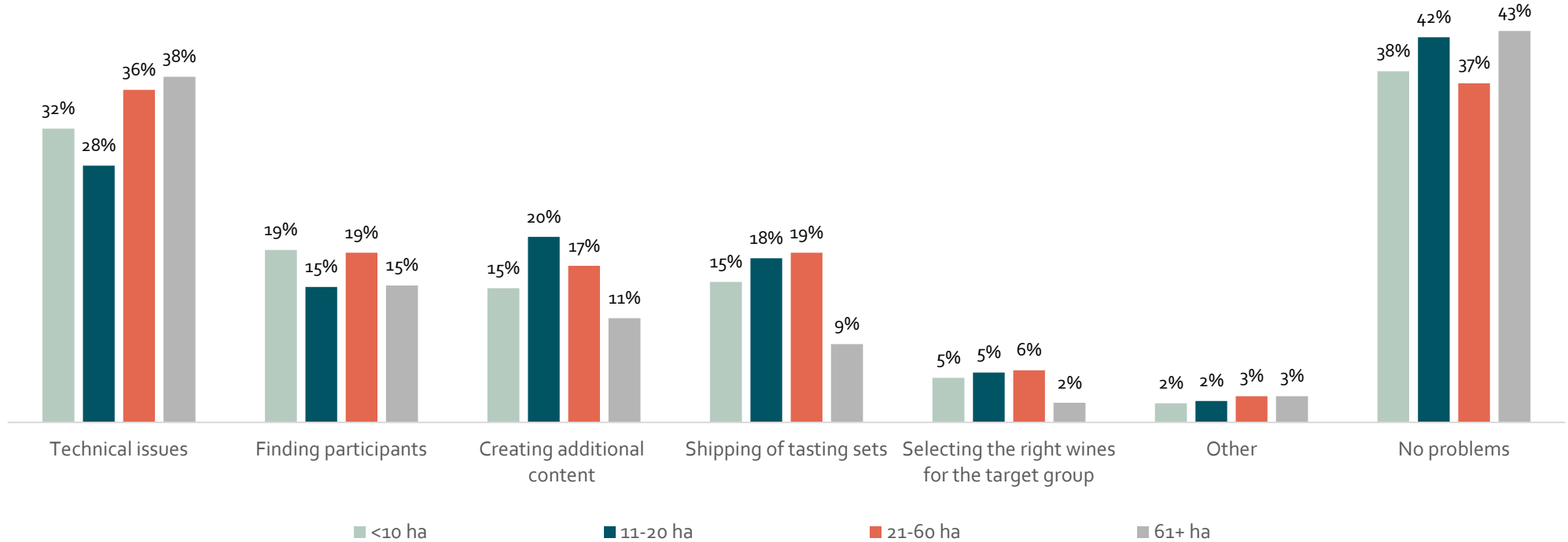
(Wineries with OWT; N=551; in %)



- Old World wineries (41 %) had less problems overall during the online wine tastings than New World wineries (35 %).

Problems with online wine tastings by size

(Wineries with OWT; N=551; in %)



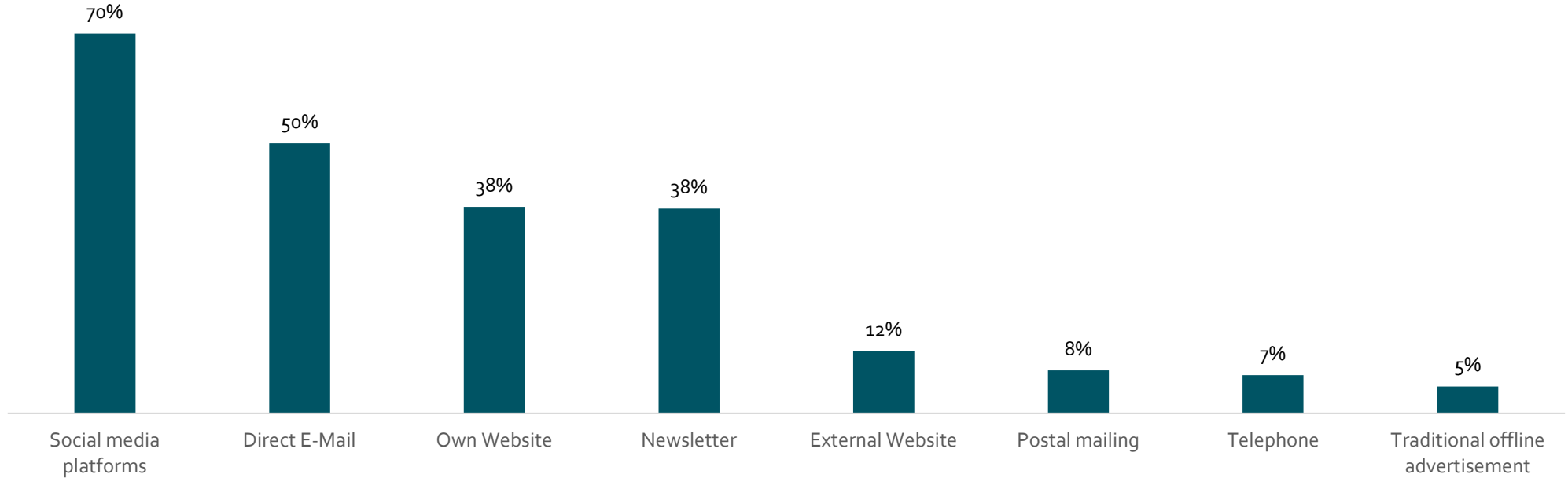
- No major differences between the various winery sizes.

Chapter 3.9

PLATFORMS FOR ADVERTISING ONLINE WINE TASTINGS

Platforms for advertising online wine tastings

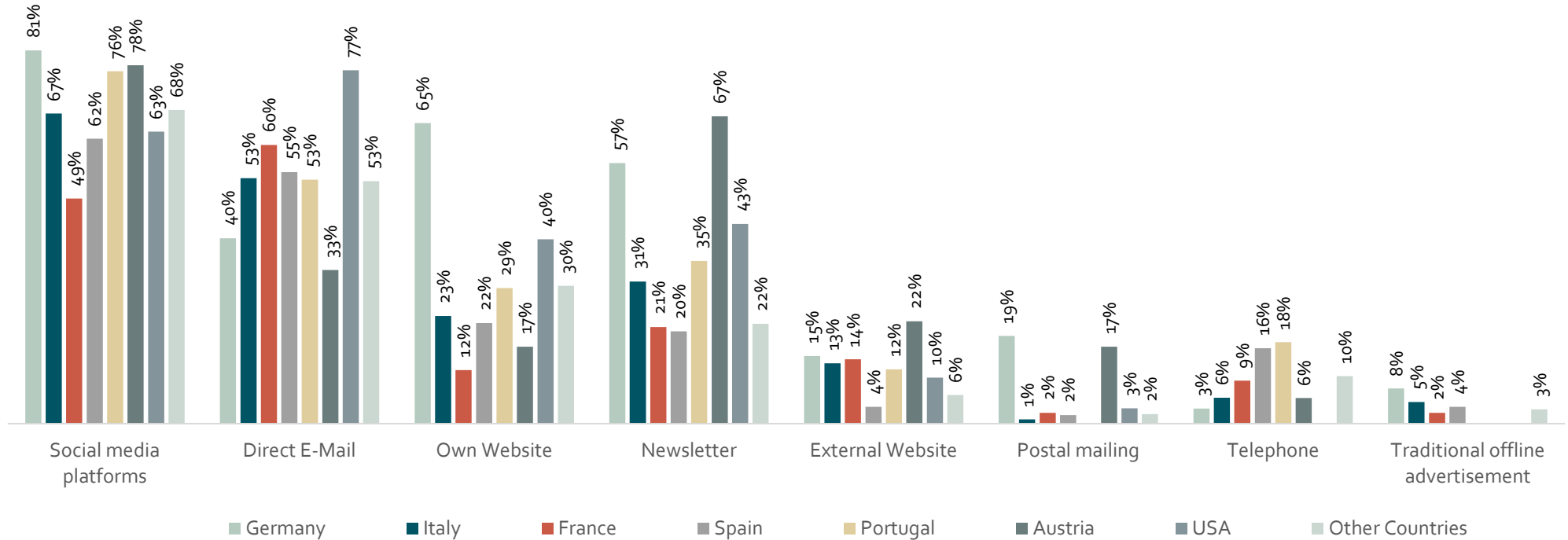
(Wineries with OWT; N=551; in %)



- Online wine tastings were mainly advertised through online channels, the most important ones being social media platforms (70%).
- In addition, half of the wineries (50%) sent out direct E-Mails to raise awareness for the upcoming online wine tasting.
- The usage of traditional communication platforms was clearly lower. Postal mailing and telephone as a means to advertise the online wine tastings have been used by 7-8%, while offline advertisement only by 5% of the wineries.

Platforms for advertising online wine tastings by country

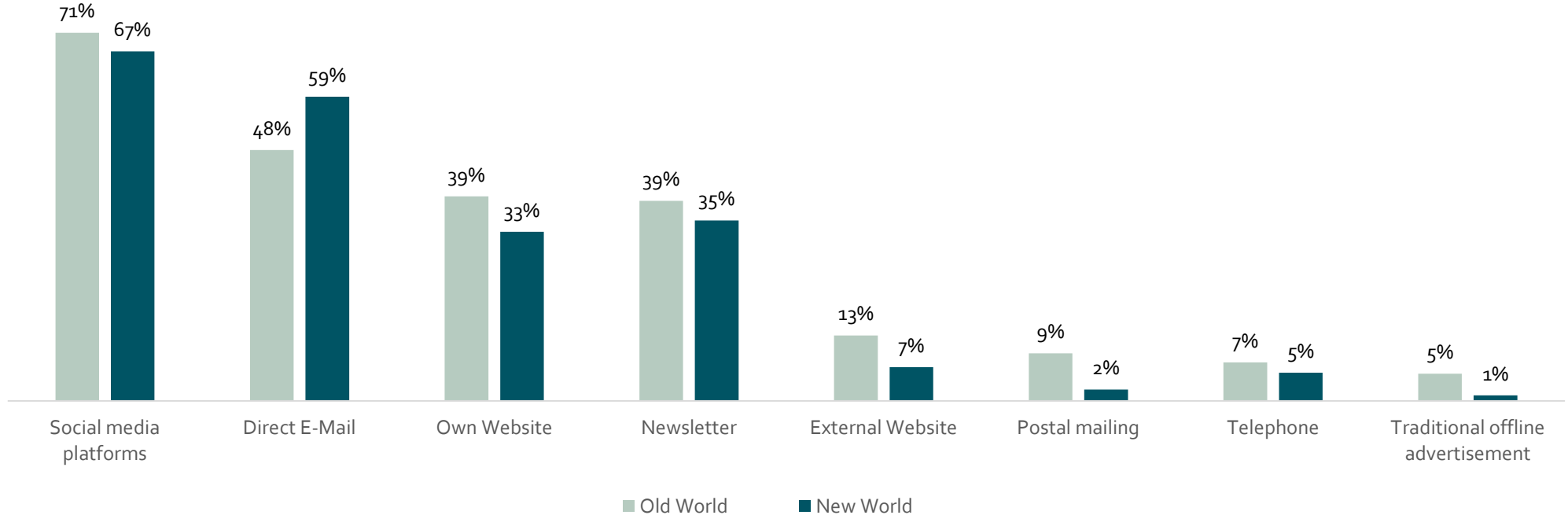
(Wineries with OWT; N=551; in %)



- German wineries did advertising their OWTs by using social media platforms, their own website and newsletter.
- Many of US wineries used platforms such as direct E-mails (77%) and SM (63%) to promote their online wine tastings.
- It is a significant difference how German wineries use this own website compared to the other European countries.

Platforms for advertising online wine tastings by OW/NW

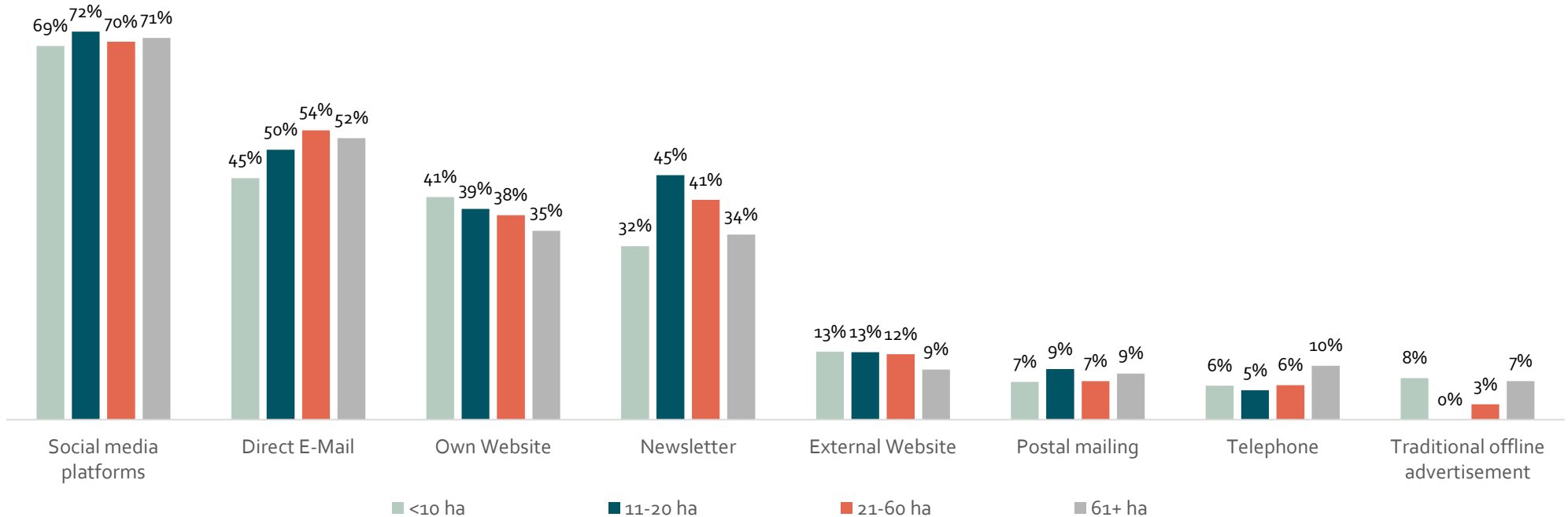
(Wineries with OWT; N=551; in %)



- New World wineries (59 %) sent more direct e-mails to their customers than Old World wineries (48 %).
- No other major differences.

Platforms for advertising online wine tastings by size

(Wineries with OWT; N=551; in %)



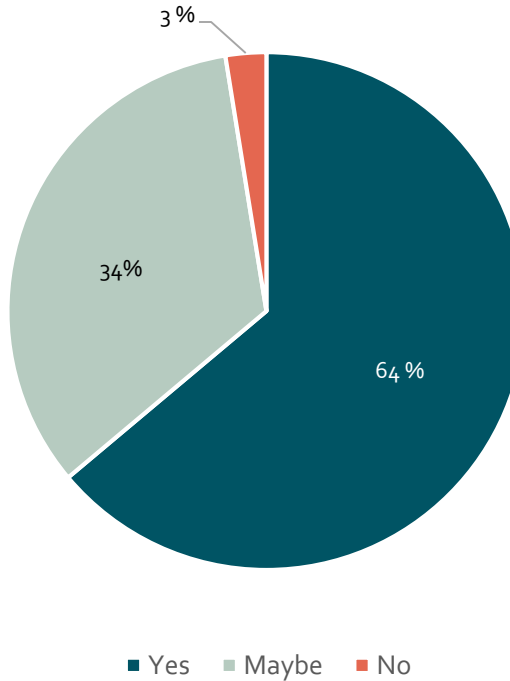
- No major differences between the various winery sizes.

Chapter 3.10

WILLINGNESS TO CONTINUE OFFERING ONLINE WINE TASTINGS

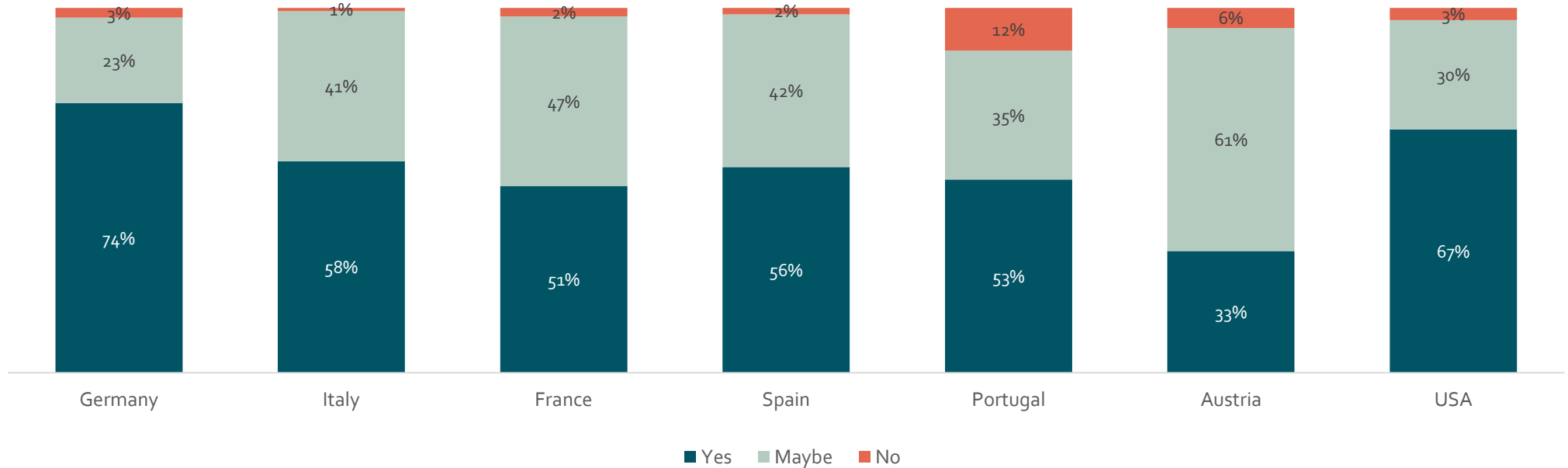
Willingness to continue offering online wine tastings

(Wineries with OWT; N=551; in %)



- Since many wineries were able to achieve their goals with online wine tastings - and 50% even make profits through them - it is not surprising that most of them want to continue offering online wine tastings.
- Only 3% do not want to offer this type of wine tasting in the future.

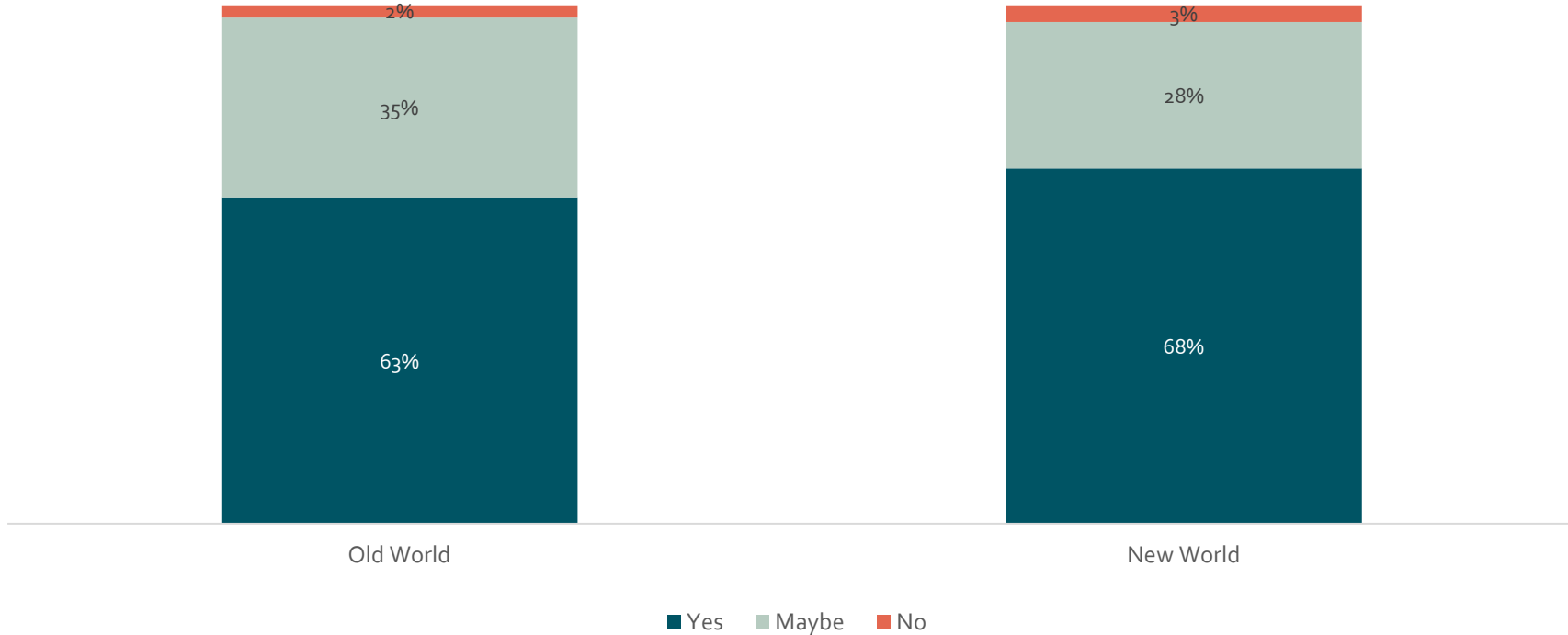
Willingness to continue offering online wine tastings by country (Wineries with OWT; N=551; in %)



- With 12 %, Portugal has the highest number of wineries in the country comparison that no longer want to offer online wine tastings.
- In Austria, only one-third of all wineries want to continue for sure offering wine tastings online.
- Germany (74 %) and the USA (67 %) have the most wineries that want to continue offering wine tastings online.
- The majority of wineries want to continue offering online wine tasting or are still considering it.

Willingness to continue offering online wine tastings by

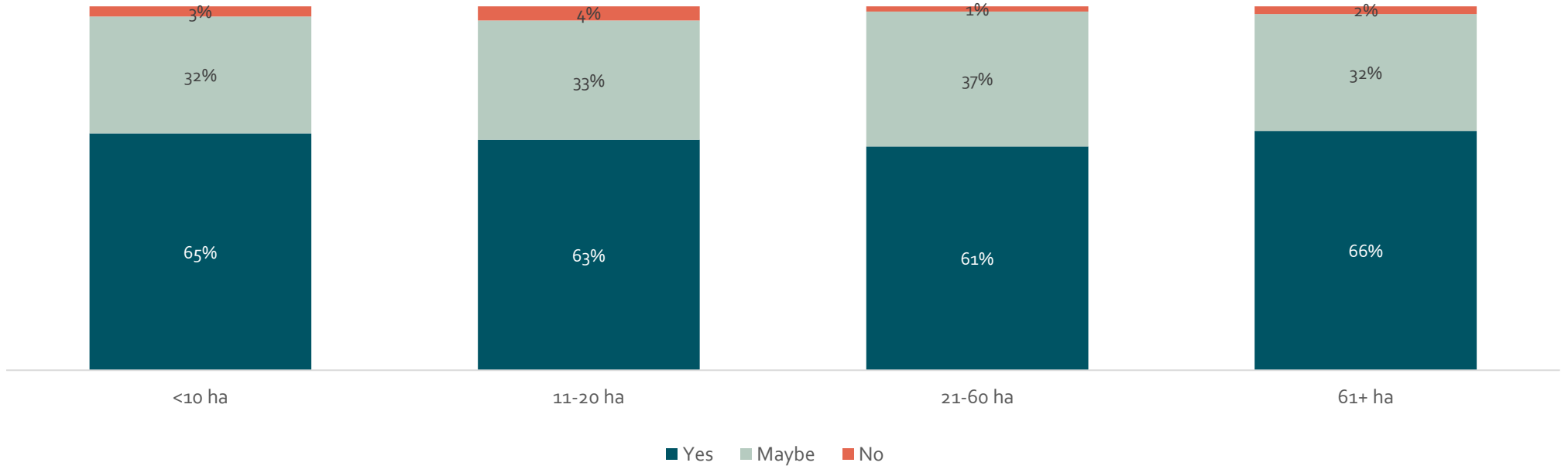
OW/NW (Wineries with OWT; N=551; in %)



- The survey found no major differences between Old and New World in terms of the willingness to continue offering online wine tastings.

Willingness to continue offering online wine tastings by size

(Wineries with OWT; N=551; in %)



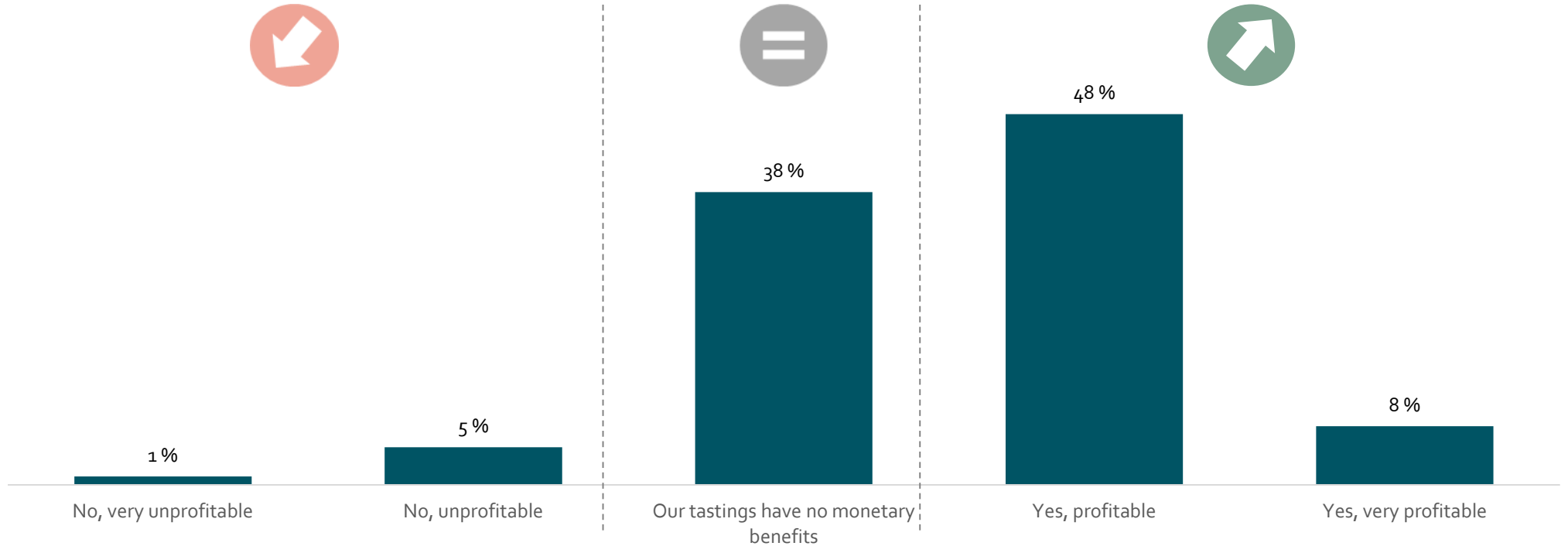
- No major differences in the sub-groups by size.

Chapter 3.11

PROFITABILITY OF ONLINE WINE TASTINGS

Profitability of online wine tastings

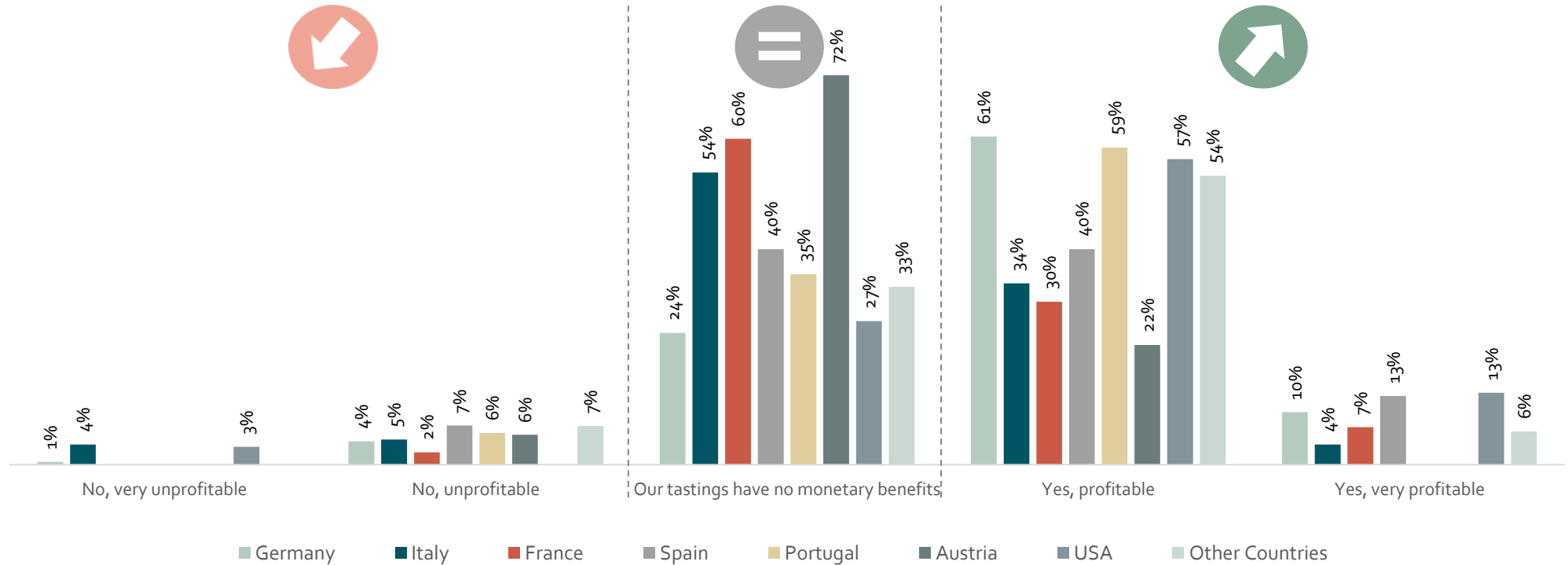
(Wineries with OWT; N=551; in %)



- More than half of the wineries that hosted online wine tastings rated them as profitable or very profitable.
- Only 6% of the wineries reported that online wine tastings had not been profitable for them.
- Online wine tasting seem to be a good way to counter decreasing sales.

Profitability of online wine tastings by country

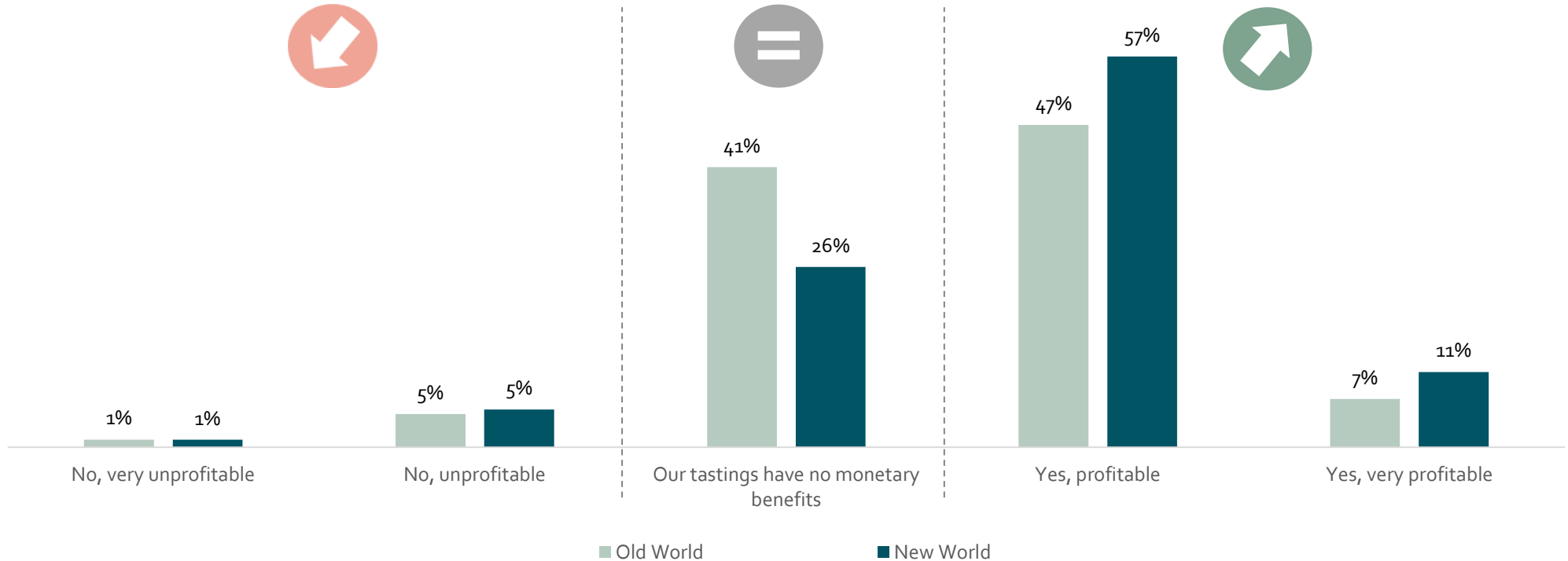
(Wineries with OWT; N=551; in %)



- 70% of US and 71 % of German wineries rated online wine tasting as profitable.
- On the other hand, only 38 % of Italian and 37 % of France wineries rated online wine tasting as profitable.
- Most wineries did not regard online wine tasting as unprofitable.

Profitability of online wine tastings by OW/NW

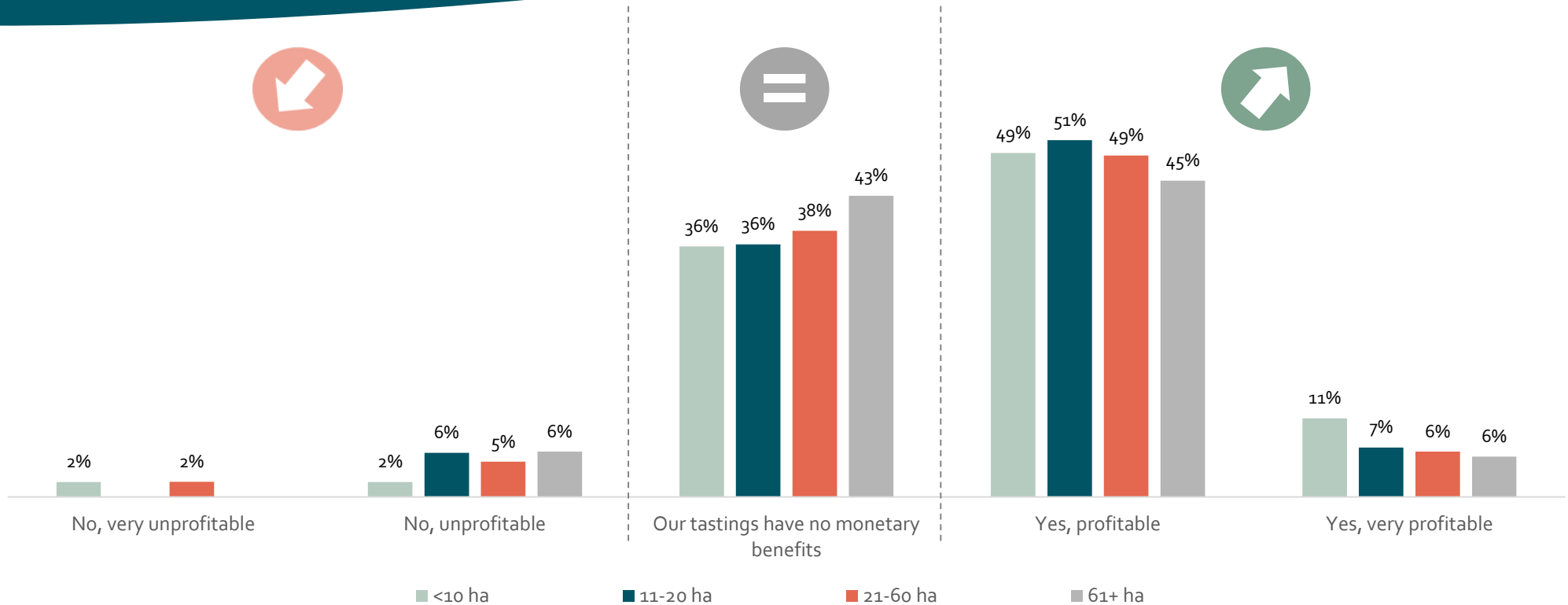
(Wineries with OWT; N=551; in %)



- New World wineries regarded online wine tasting as more profitable than the Old World wineries.
- Only 6% of all wineries regarded online wine tasting as unprofitable.

Profitability of online wine tastings by size

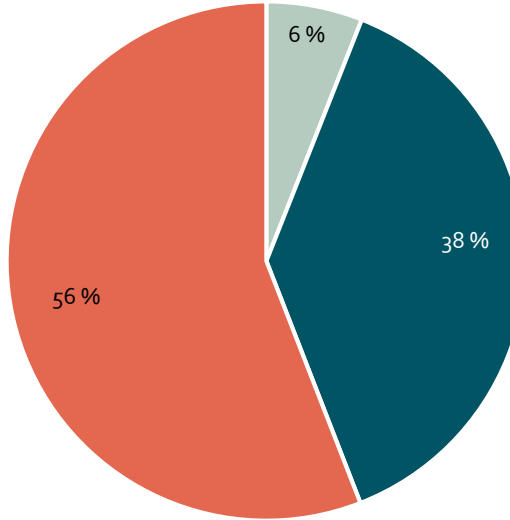
(Wineries with OWT; N=551; in %)



- There are no major differences between the various winery sizes.

Profitability of online wine tastings

(Wineries with OWT; N=551; in %)



■ Unprofitable

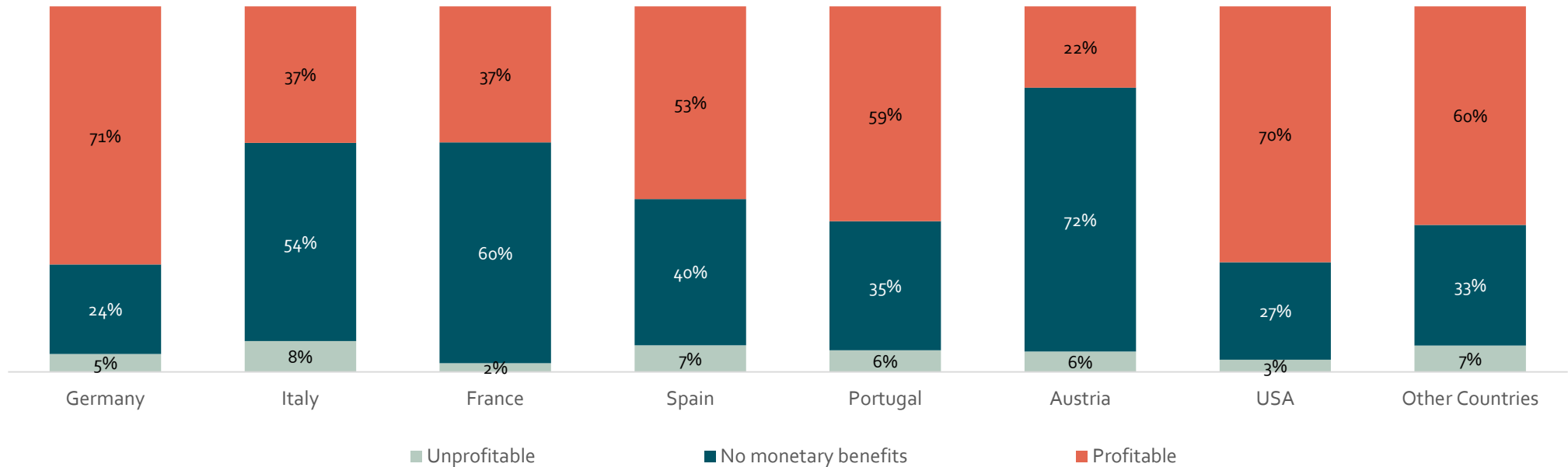
■ No monetary benefits

■ Profitable

- More than half of the wineries that hosted online wine tastings rated them as profitable.
- Only 6% of the wineries reported that online wine tastings had not been profitable for them.
- Online wine tasting seem to be a good way to counter decreasing sales.

Country classified by profit

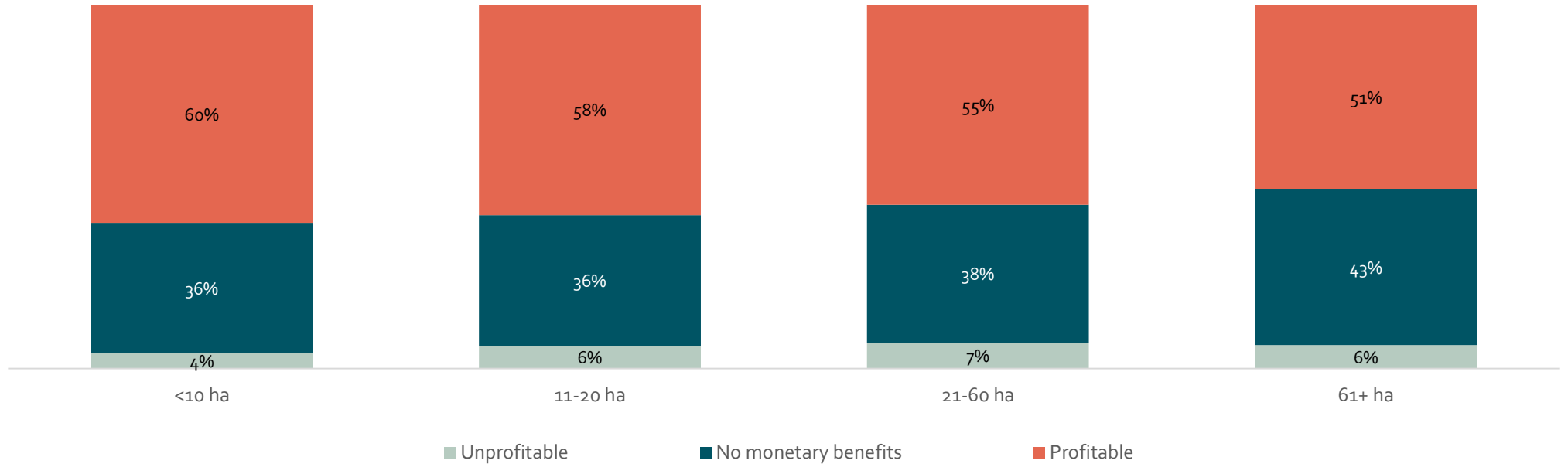
(Wineries with OWT; N=551; in %)



- In general, you can assume that you can organize successful online wine tastings in any country.
- The German (71%) and US (70%) wineries were able to achieve the highest profits.
- Only a small number of wineries have considered online wine tasting as unprofitable.

Size of the winery by profit

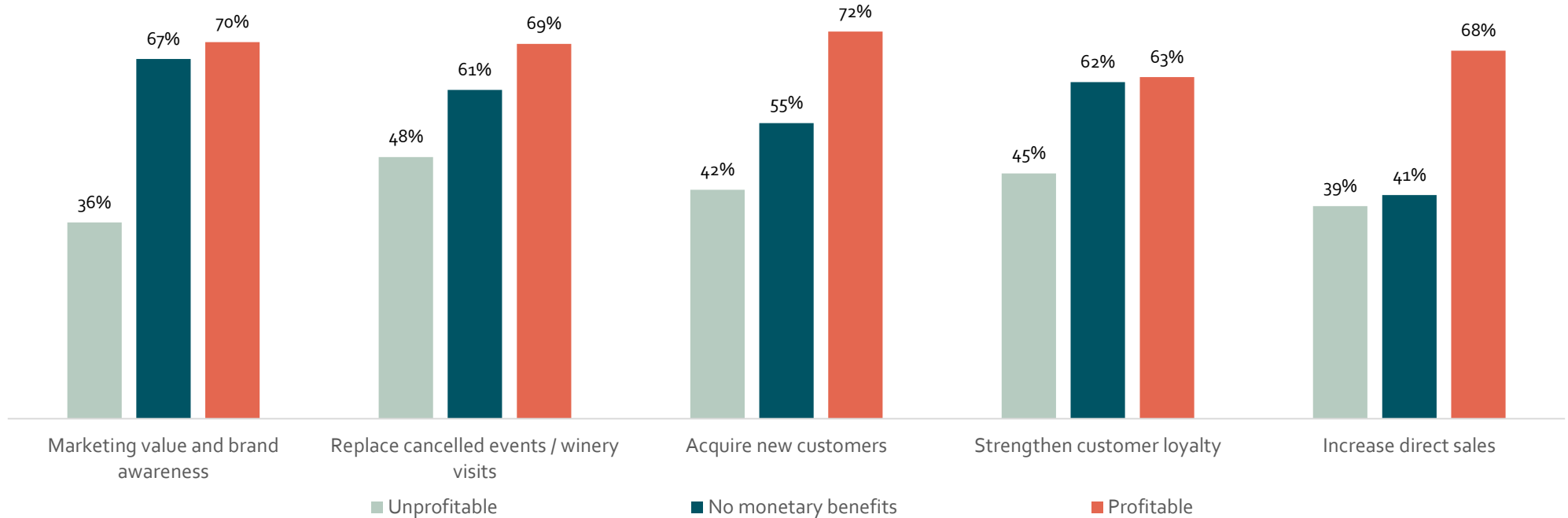
(Wineries with OWT; N=551; in %)



- The size of the winery had nothing to do if they had profitable online wine tastings.

Reasons for offering online wine tastings by profit

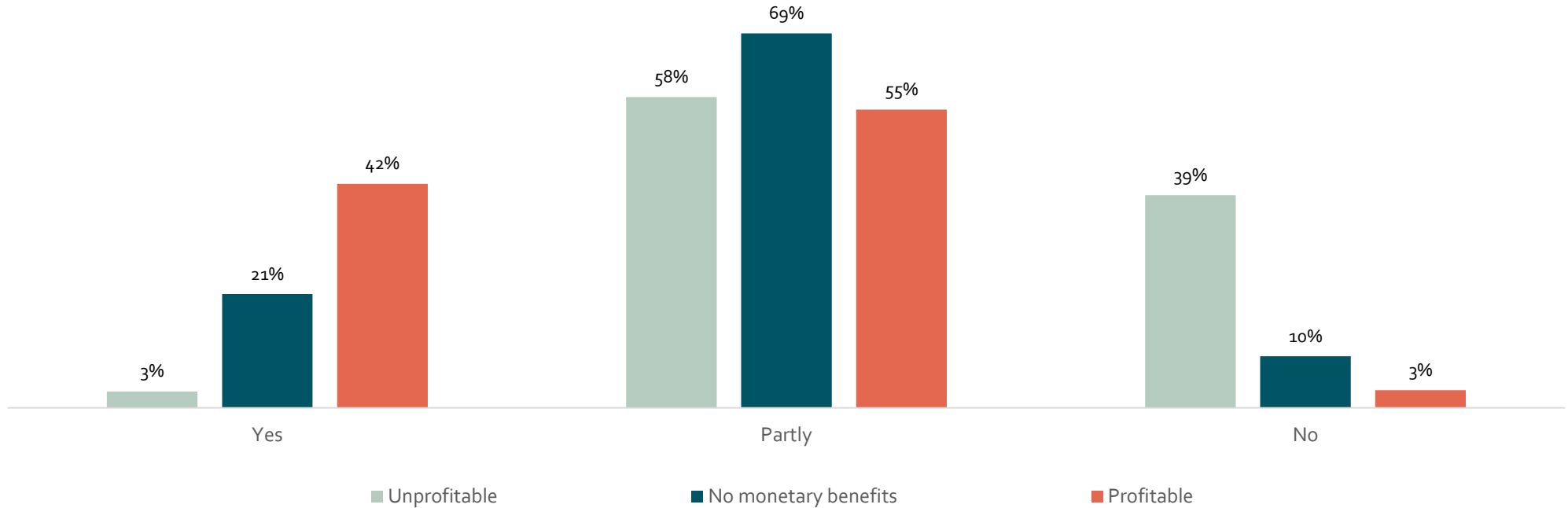
(Wineries with OWT; N=551; in %)



- The wineries considering online wine tastings as not profitable generally set themselves less targets. It seems like they only did the online wine tests on the sidelines and didn't think much about it beforehand.
- The profitable wineries have prepared themselves more and were able to think about their goals in advance.

Success of the online wine tastings by profit

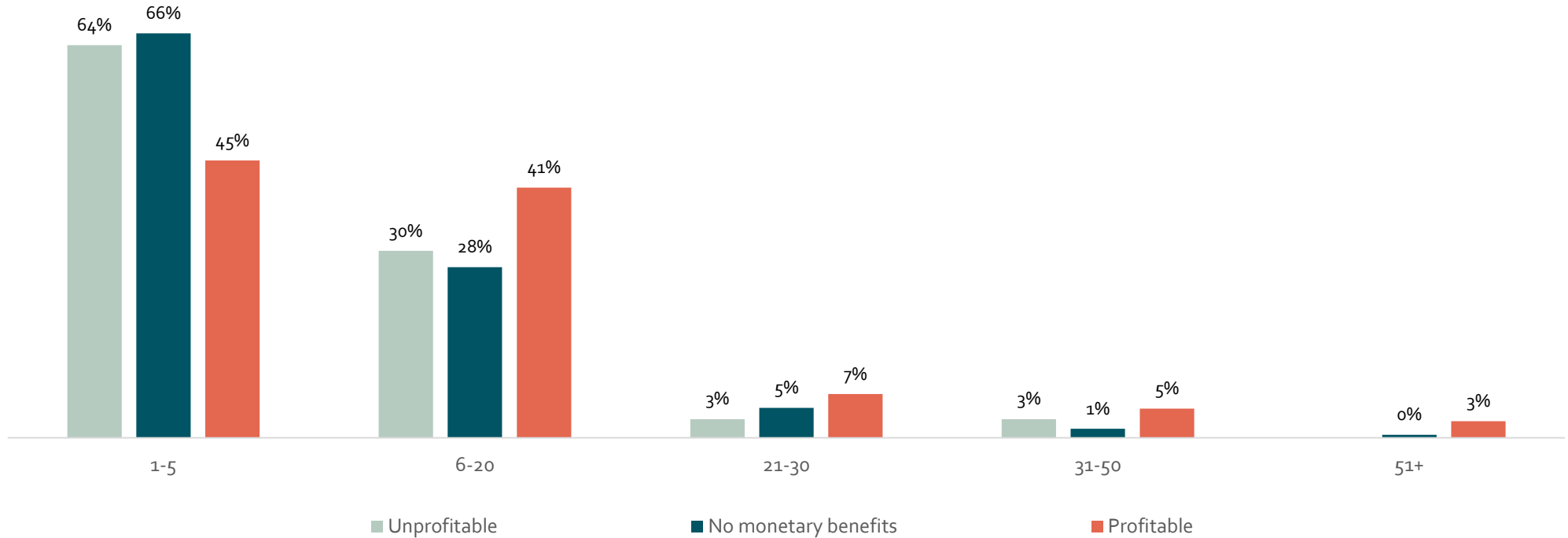
(Wineries with OWT; N=551; in %)



- 42 % of the wineries that considered the online tastings to be profitable were able to achieve their goals and 55 % achieved it partly. Only 3 % could not reach it.
- The unprofitable wineries could not or only partially achieve their goals (97 %).
- If the targets could be reached, most wineries did profit with online wine tastings.

Number of online wine tastings in 2020 by profit

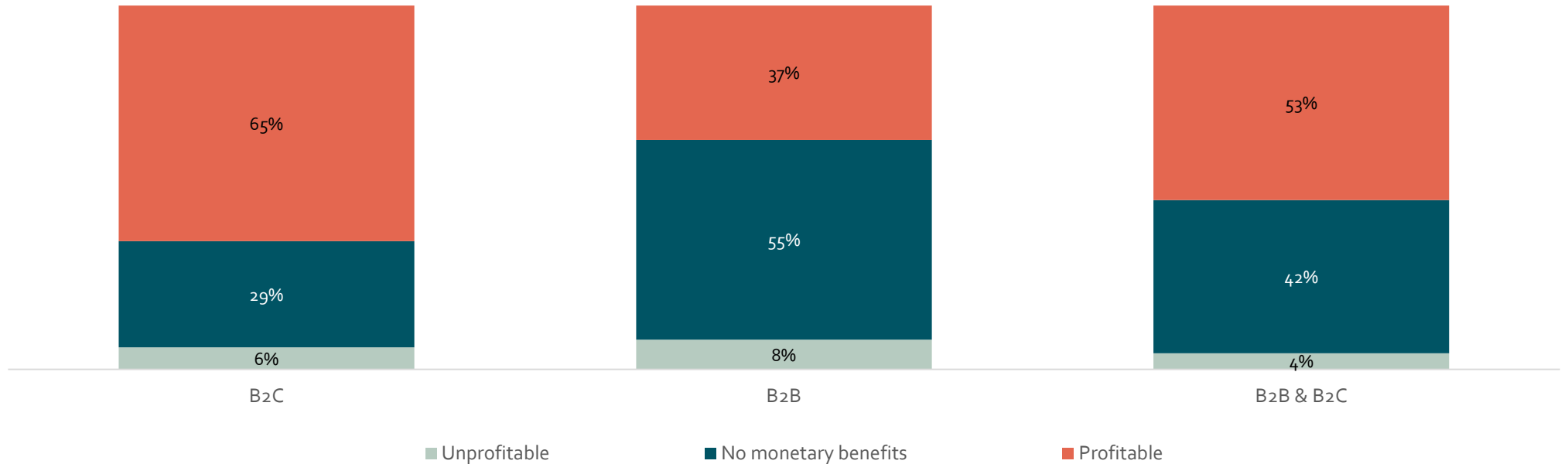
(Wineries with OWT; N=551; in %)



- The profitable wineries hosted more online wine tastings. They were also the only organizers with more than 50 online Wine tastings (3 %).
- 64 % of wineries that did not make a profit from online wine tasting had less than 6 hosts.

Main target group for online wine tastings by profit

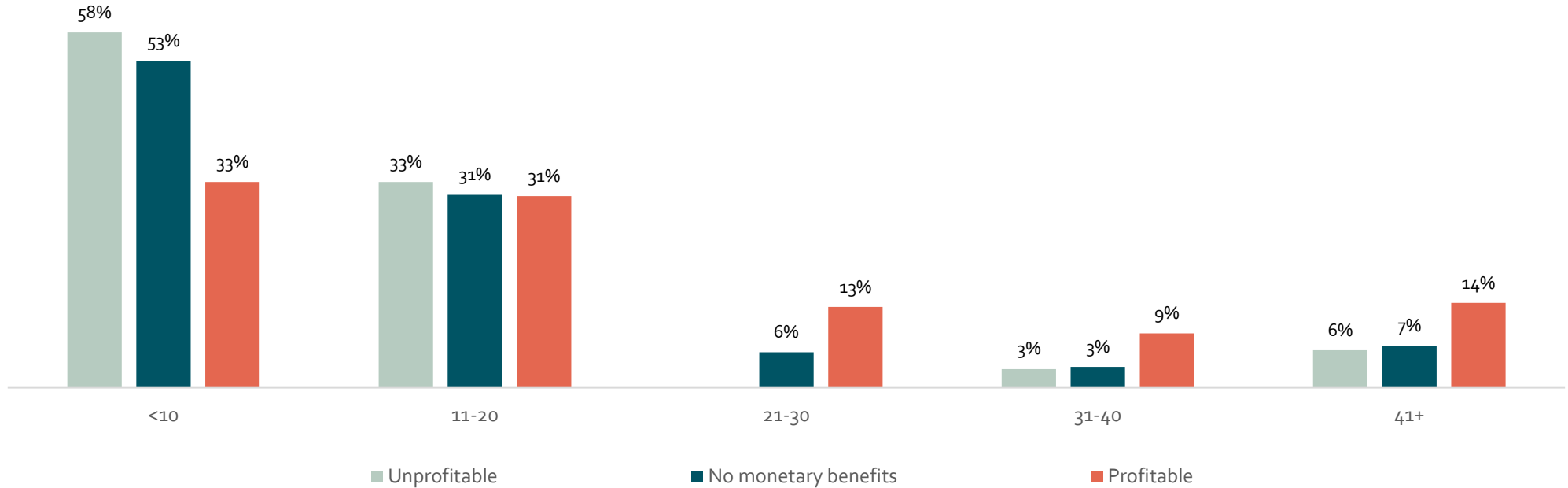
(Wineries with OWT; N=551; in %)



- The profitable wineries mainly hosted B2C or mixed (B2B & B2C) online wine tastings.
- B2B online wine tasting can be profitable in the long run, but not in the short run, as the wine packages are provided free of charge and the business partners have to be convinced of the product before they buy it.
- B2C online wine tasting directly generates profit as customers have to buy the packages.

Average number of participants per tasting by profit

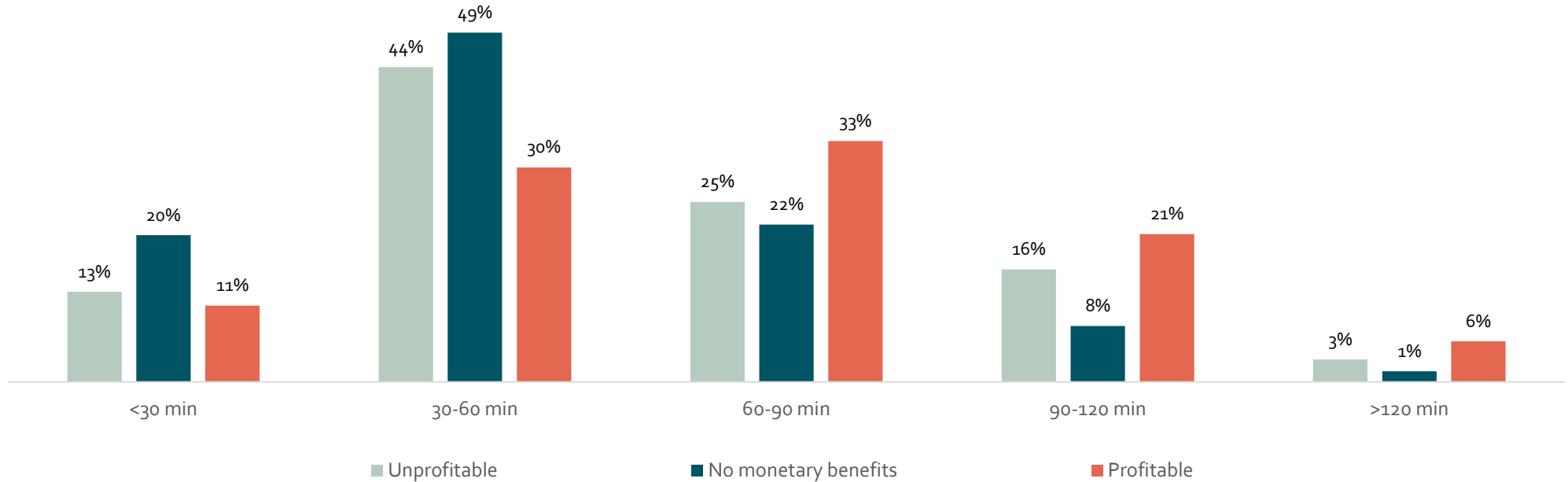
(Wineries with OWT; N=551; in %)



- 58 % of the unprofitable wineries held online wine tastings with less than 11 participants.
- Having a higher number of participants seemed to be profitable.

Average length of online wine tastings by profit

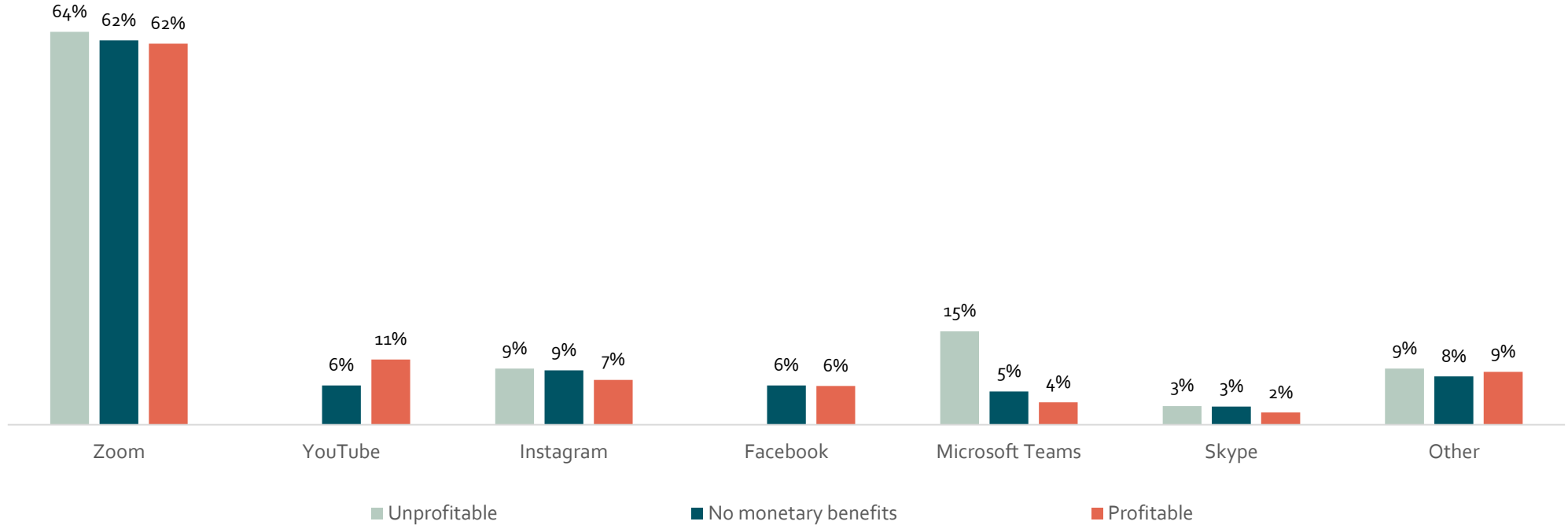
(Wineries with OWT; N=551; in %)



- It is interesting to notice that the length of the online wine tasting seemed to depend on the outcome.
- The profitable wineries took more time for the online wine tastings. For 27 % it took longer than 90 min.
- In contrast, 57 % of the unprofitable wineries held a online wine tasting for less than 60 minutes.

Platforms used for online wine tastings by profit

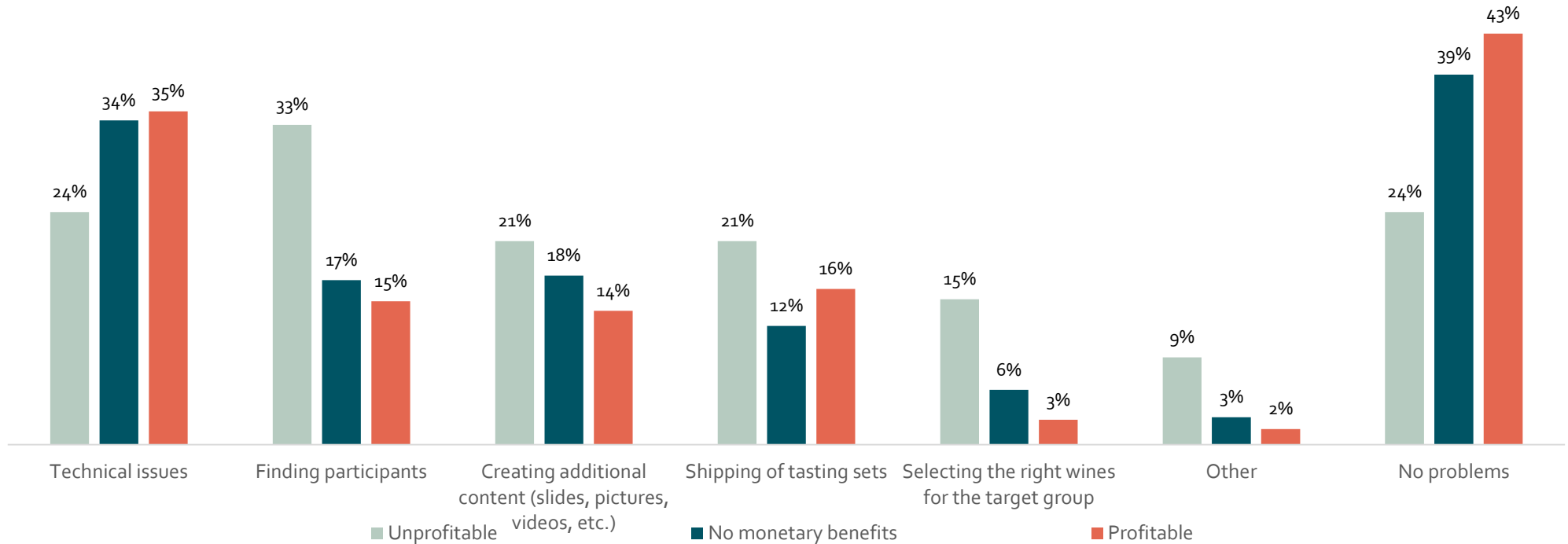
(Wineries with OWT; N=551; in %)



- When considering which platform was used, no significant differences could be found.
- Zoom is used for most online meetings because it is very user-friendly and did not require registration or download. Furthermore, the moderator can use many features provided by the site.
- Zoom is the easiest platform to use for online wine tastings.

Problems with online wine tastings by profit

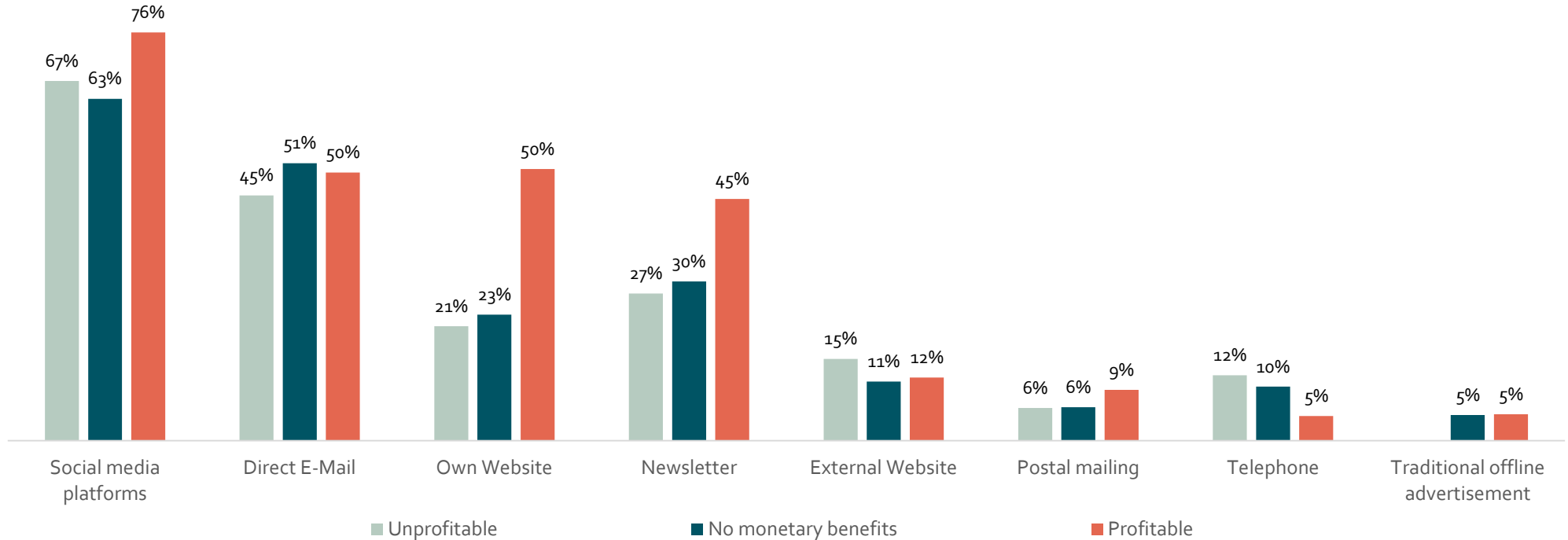
(Wineries with OWT; N=551; in %)



- The main problem of the unprofitable wineries was to find participants. Generally, these wineries had more problems than the profitable wineries.
- Most of the profitable wineries had no problems (43%).
- To minimise the problems, good preparation is needed.

Platforms for advertising online wine tastings by profit

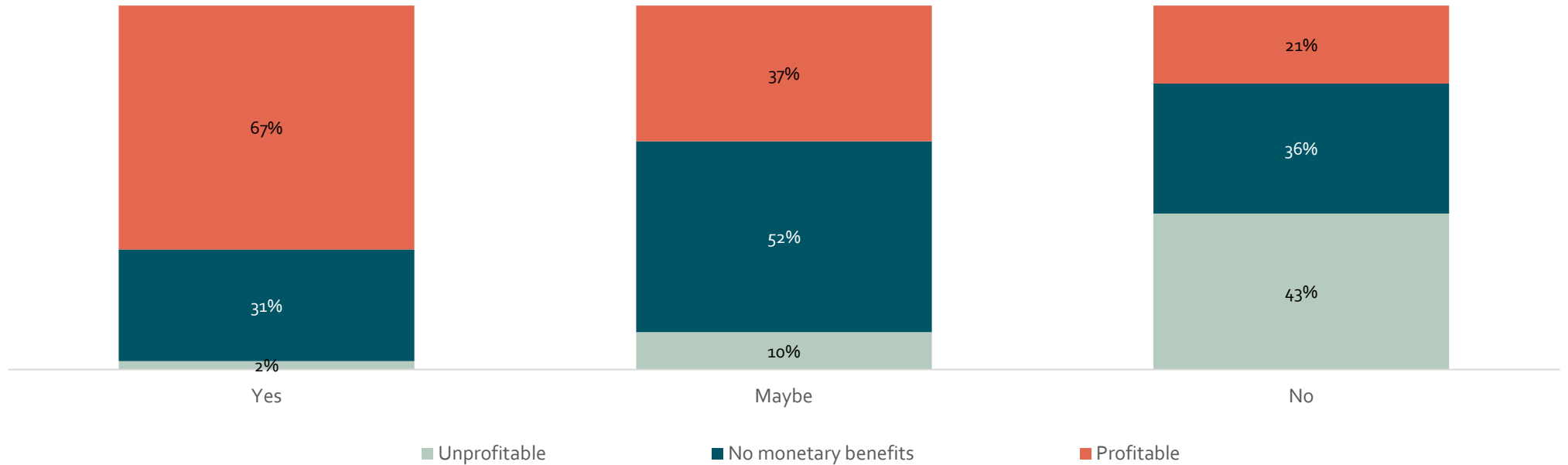
(Wineries with OWT; N=551; in %)



- The profitable wineries did more advertising. Especially on the own website (50 %) and in the newsletter (45 %). They spent less time advertising via telephone, as this is not an efficient form of marketing, especially given time constraints for many wineries.
- It is very important to advertise the online wine tastings sufficiently and on the right platforms.

Willingness to continue offering online wine tastings by profit

(Wineries with OWT; N=551; in %)



- Of course, the profitable wineries showed more willingness to continue offering online wine tastings.

Chapter 4

RESULTS

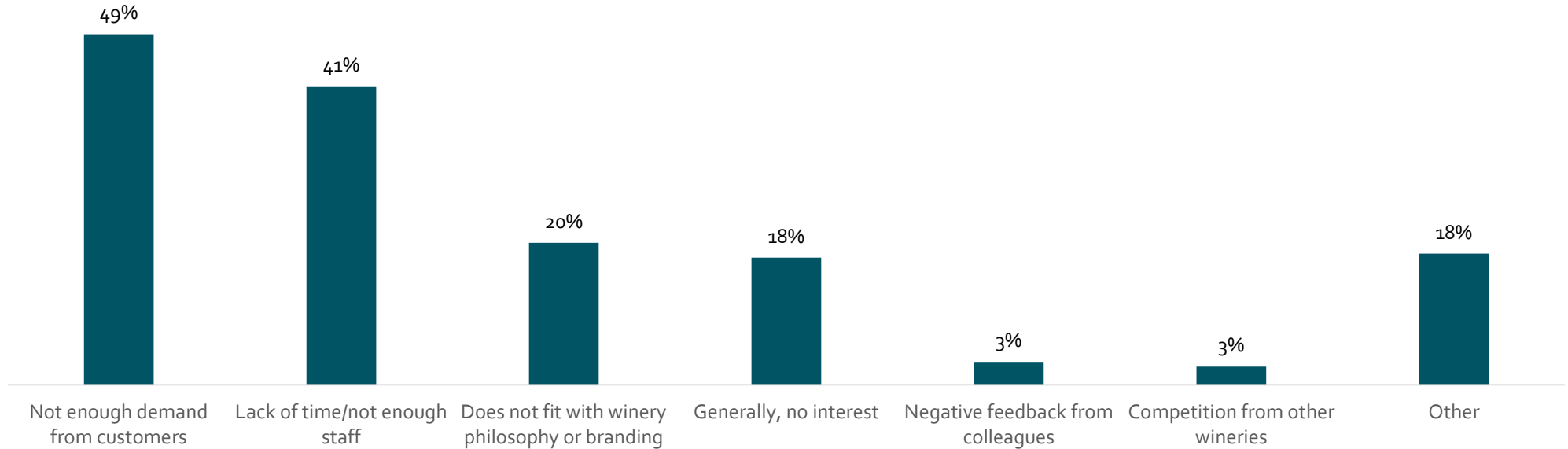
WINERIES WITHOUT ONLINE WINE TASTING

Chapter 4.1

MAIN REASONS FOR NOT HOLDING ONLINE WINE TASTINGS

Main reasons for not holding online wine tastings

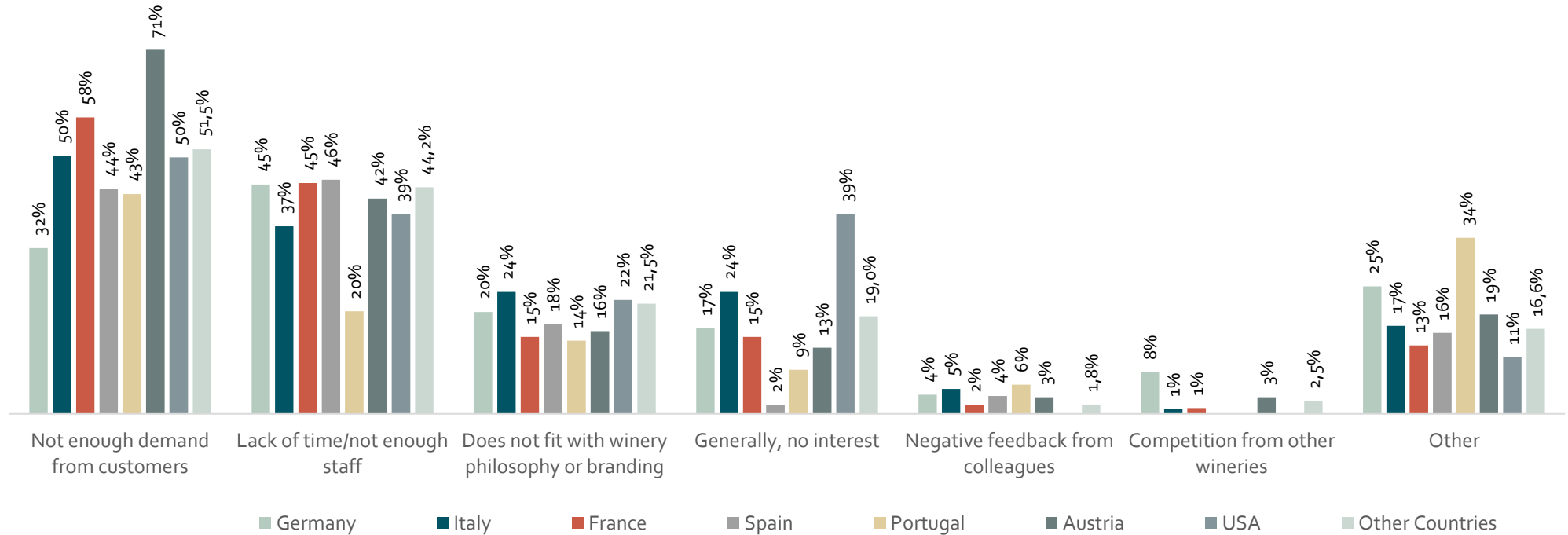
(Wineries without OWT; N=872; in %)



- The reasons for wineries not to conduct online wine tastings were quite diverse. The most important reason was that wineries felt there was not enough demand from customers (49%).
- Another 41% reported a general lack of time or staff for this activity. One-fifth of respondents either had no interest in conducting online wine tastings (20%) or saw a contradiction with their existing company philosophy (18%).
- Only 3% of respondents stated that negative feedback from colleagues or the high level of competition are reasons for not introducing online wine tastings.

Main reasons for not holding online wine tastings by country

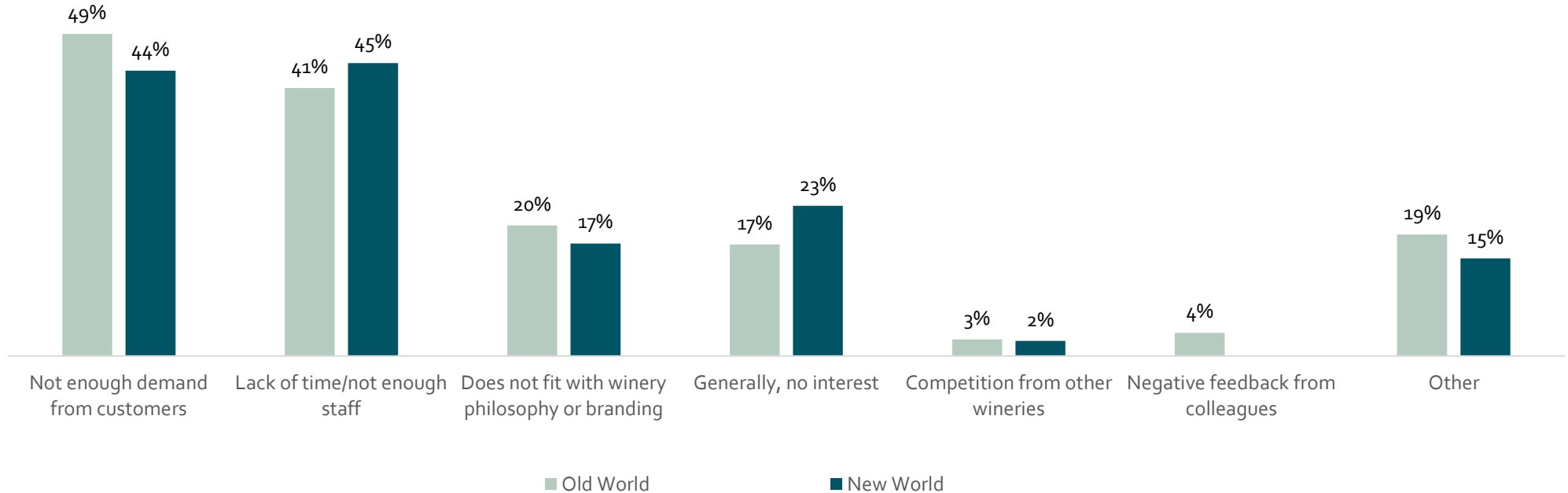
(Wineries without OWT; N=872; in %)



- In Germany, the main reason was the lack of time/not enough staff (45 %).
- 39 % of USA wineries reported that they are not generally interested in online wine tasting.
- In Austria, there were the lowest number of requests from customers for online wine tastings (71 %).

Main reasons for not holding online wine tastings by OW/NW

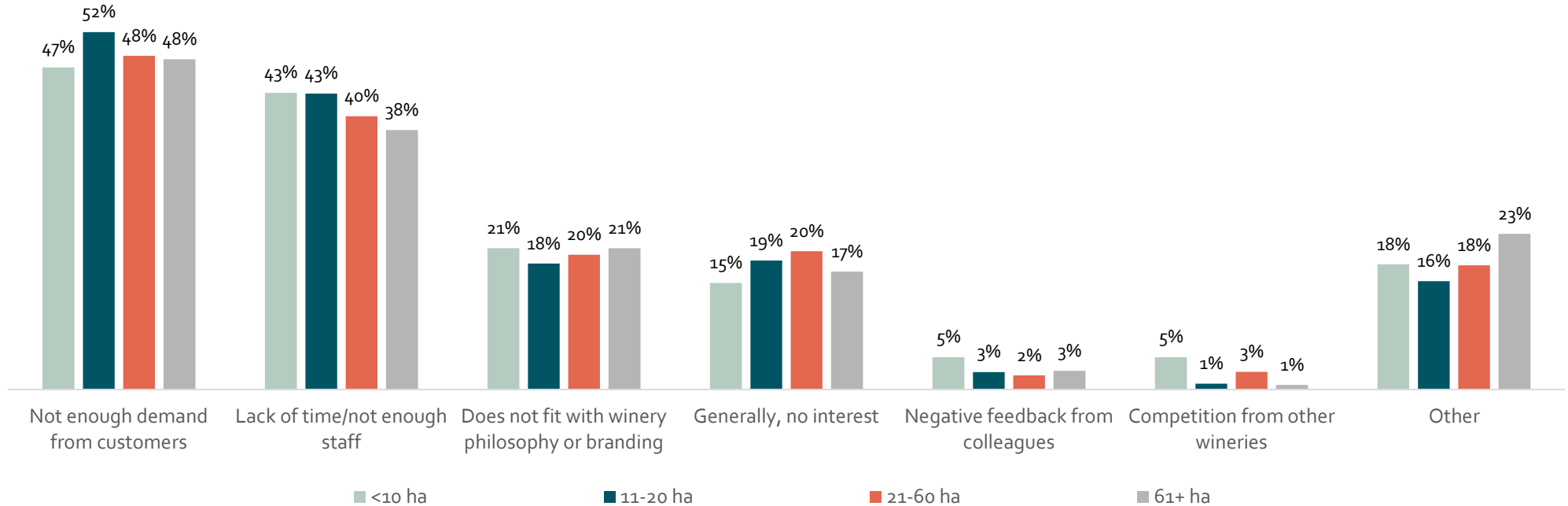
(Wineries without OWT; N=872; in %)



- The survey found no major differences between Old and New World in terms of the continuation of online wine tasting.

Main reasons for not holding online wine tastings by size

(Wineries without OWT; N=872; in %)



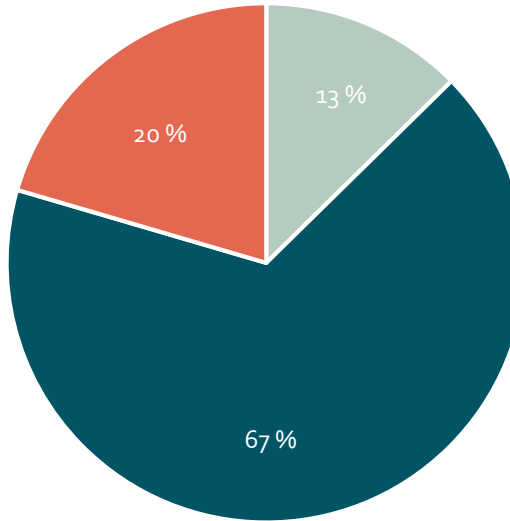
- No major differences in the sub-groups by size.

Chapter 4.2

WILLINGNESS TO LAUNCH ONLINE WINE TASTINGS IN THE FUTURE

Willingness to launch online wine tastings in the future

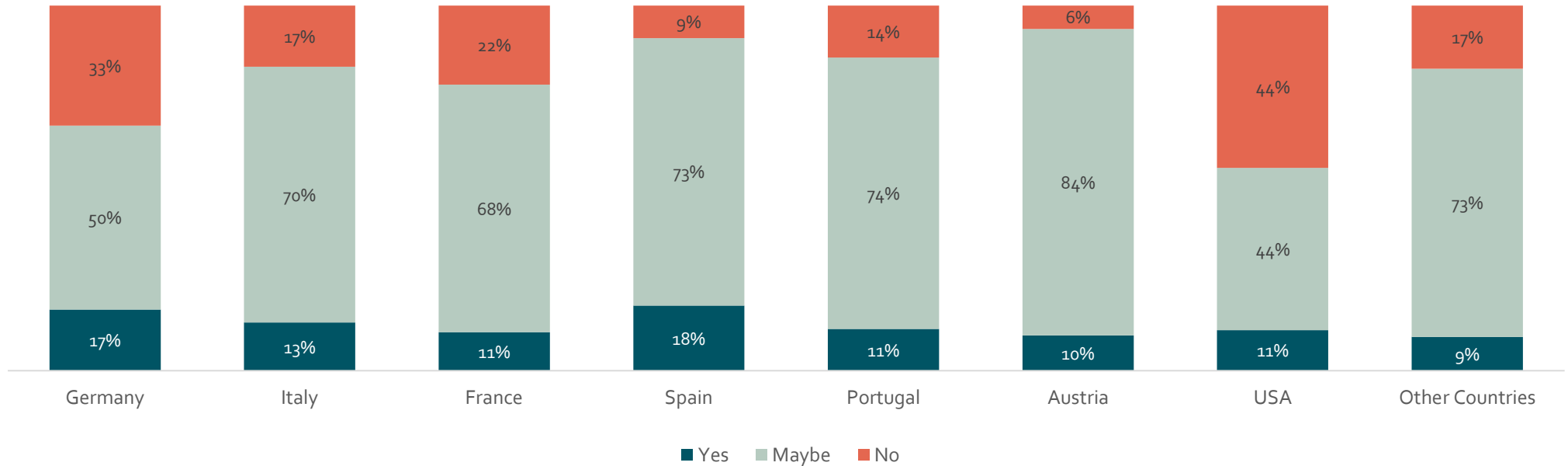
(Wineries without OWT; N=872; in %)



■ Yes ■ Maybe ■ No

- Despite of the reasons against online wine tasting, most wineries (80%) are - at least maybe - willing to introduce them in the future.
- Only 20% of wineries say they have no interest in launching online wine tastings.

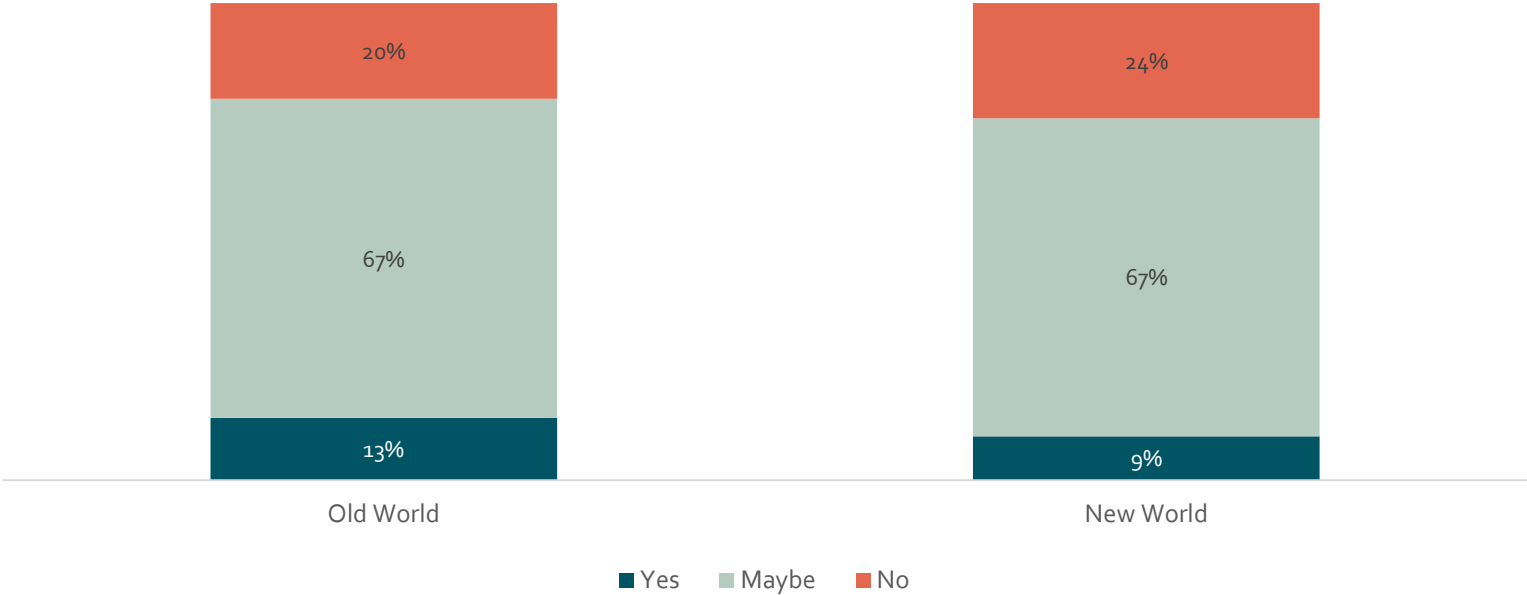
Willingness to launch online wine tastings in the future by country (Wineries without OWT; N=872; in %)



- In the USA (44 %) and Germany (33 %), most wineries do not want to offer online wine tastings in the future.
- Every fifth winery in Spain wants to offer online wine tasting in the future.
- Only 6% of the Austrian wineries do not plan to offer online wine tastings in the future.

Willingness to launch online wine tastings in the future by

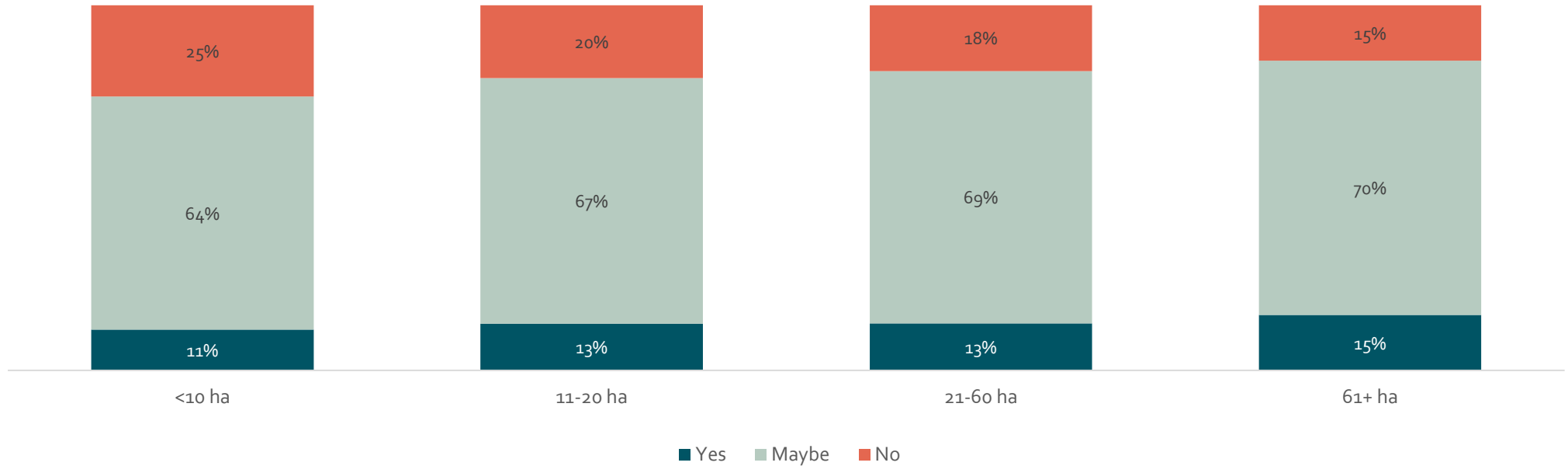
OW/NW (Wineries without OWT; N=872; in %)



- There are no major differences between Old and New World wineries.

Willingness to launch online wine tastings in the future by size

(Wineries without OWT; N=872; in %)



- One quarter of the small wineries do not want to offer online wine tastings in the future either.
- There is higher interest in online wine tastings from larger wineries.

Chapter 5

SUMMARY

1. Covid19 pandemic, the accelerator of digitalization in all sectors, caused the incredible success of OWTs. This modern type of wine tasting was almost unknown before the pandemic.
2. Size matters – the larger the winery, the more OWTs have been organized. However, results show that larger wineries had the highest decrease in terms of winery visitors.
3. The reason for offering OWTs is very versatile and differs mainly by the size of the winery.
4. Zoom as an online platform for wine tastings rocks the wine world. This can be explained by the fact that Zoom is a user-friendly platform, which includes many useful features moderators can use during the tasting. In addition, no registration or download is necessary to start Zoom as a participant.
5. OWT is an excellent way to counter decreasing sales, and it seems to be a profitable business – more than half of the wineries that hosted online wine tastings rated them as profitable or very profitable.
6. The profile of a profitable winery: 1) leverages more sales and marketing channels 2) tends to hold tastings for larger groups 3) focus on B2C 4) host longer tastings
7. Germany hosted by far the most B2C OWTs, while a higher share of B2B tasting could be stated in other countries.
8. Wineries are cautious about the number of OWTs. Every second winery offered less than 6, and one-third between 6-20 OWTs.
9. German wineries offered OWTs to consumers, while other wineries used this tool also for business customers.
10. OWT came to stay – the majority of wineries hosted OWTs in the last year, plan to offer OWTs in the future, too.
11. The main reasons for not offering OWTs were “low perceived demand from customers” and “a lack of time and/or staff”.
12. 80% of wineries that did not host OWTs in the past are willing or at least considering launching OWT in the future.

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