

WINEGB

WINES OF GREAT BRITAIN



# UK WINE TOURISM IN 2024

Exploring a growth sector, and  
identifying actions to accelerate



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# FOREWORD

BY SAM LINTER, CHAIR  
OF WINEGB

English  
Wine Week  
15<sup>TH</sup> - 23<sup>RD</sup> JUNE 2024



I am delighted that we are launching the first of three growth reports in the run up to the General Election, allowing us to highlight the value of our sector to politicians. We are also launching this report during WineGB's **English Wine Week**, which celebrates its 19th year and acts as a moment to showcase our sector. This year, hundreds of events are being held throughout the week, providing thousands of visitors with the chance to attend wine festivals, visit vineyards, and taste our wines, perhaps for the first time.

This report focuses on the importance of tourism to our domestic wine producers and the development opportunities in an increasingly significant part of the UK economy. The second report in our growth series, launching in July, will focus on data and will include planting, production, and sales figures for 2023. This data highlights our sector's impressive upward trajectory and cements our position as the UK's fastest growing agricultural sector. We will release additional data on exports at the WineGB Trade and Press Tasting in September. Our annual tasting brings the on- and off-trade, media, and wine communicators together, and provides a unique opportunity to taste a huge array of English and Welsh wines in one room.

This report will help:

- Producers seeking information on **what is happening** in wine tourism and **where to learn** more about growing your business.
- Members of the trade searching for **trends and opportunities** in English and Welsh wine.
- Policy professionals and politicians seeking to **accelerate support** for our sector so we can level up our communities by boosting the rural economy, providing more skilled jobs, and increasing tourism.

I have had the privilege to grow up within wine, living on my family's vineyard and, until recently, ran one of the country's largest producers, Bolney Wine Estate in Sussex. The importance of wine tourism is clear to me. Getting people to visit the vineyard is essential as it builds a real brand connection.

We grew the business through developing our cellar door and by offering tours and tastings, and as this report shows, we were not alone. There were **1.5 million** visits to a winery or vineyard last year – up 55% from 2022 – which proves that this is a thriving, innovative, and growing part of the wine trade.

We have an opportunity to accelerate the growth of wine tourism to reach the magic **16 million** visitors who expressed interest in a winery visit. To do so we have identified **seven policy changes** that would transform the industry and we call on the new Government to seize the moment, go for growth, and make these changes.

These seven policy changes include introducing cellar door relief, which would drive sales and support tourism; providing better funding for local and national tourism boards; making tourism accessible by reducing entry visa costs and re-introducing tax-free shopping; developing better planning support and expertise for our sector; helping us provide more training for workers; improving our local infrastructure; and making destination signposting more affordable.

WineGB is driving our sector forward by promoting wine tourism. We are:

- Bringing together members and regional groups – Explore Wealden Wine Trail, Sussex Modern, Vineyards of Hampshire, Vineyards of the Surrey Hills, the Wine Garden of England, and the Yorkshire Wine Trail – to convene, communicate, educate, and work together to ensure that we are making the most of the energy, creativity, and passion in our sector.
- Members of the Tourism Alliance, comprising over 75 tourism bodies in the UK. We organised the annual Tourism Alliance Conference and Parliamentary Reception this year, providing more visibility to the sector, which brings in over 31 billion a year from visitors to the UK
- Training the sector to deliver first class tourism standards by working with national tourist board VisitEngland to roll out training across our regions using tailored insights from Wine Australia. Additionally, our Property Partner Knight Frank has provided placemaking training to 150 of our members this year.
- Carrying out research to understand the sector and track our growth.

I can't wait to share our second tourism publication 'The WineGB Guide to UK Wine Tourism', which will shine a spotlight on the vineyards and wineries providing unique experiences and working together to build local tourism networks. It will be out in time for you to plan your August Bank Holiday activities.

This is your sign to plan your next vineyard visit!



# WINEGB ACTIONS: 6 ACTIVITIES TO GROW WINE TOURISM

WineGB is committed to increasing wine tourism by:

- **Convening:** bringing the WineGB Tourism Working Group together.
- **Communicating:** to create unity and amplify the work of the sector
- **Representing:** to raise the profile and issues of the sector to relevant hospitality groups and the Government. This is supported through our membership of the Tourism Alliance where we can combine our collective needs and represent the sector to relevant hospitality groups and the Government.
- **Educating:** working with Knight Frank and VisitEngland for member training sessions and workshops.



**Working  
Group**



**Cellar Door  
Relief  
Campaign**



**Tourism  
Report**



**Policy and  
Network**



**Tourism  
Training**



**Placemaking  
Roadshow**

# WINE TOURISM IN NUMBERS

WineGB surveys members each year to track key growth trends. Over 130 members replied to the 2024 Industry Survey, which together account for over 90% of wine production in the UK.

**300** vineyards and wineries involved in wine tourism

## Top tourism activities:



**260**  
guided tours  
and tastings



**275**  
cellar doors  
and shops



**103**  
venue  
hire



**97**  
self-guided  
tours



**92**  
places  
to stay



**38**  
picnic  
areas



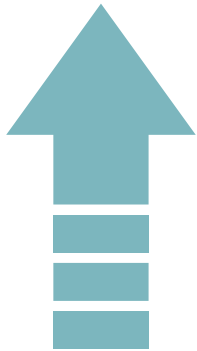
**92**  
places  
to eat





## 1.5m visits to UK vineyards and wineries in 2023

Data sourced from the WineGB Industry Survey 2024.



## 55% increase in visitor numbers since 2022

Data sourced from the WineGB Industry Survey in 2023 and 2024.



## 42% of inbound visitors expressed 'high interest' in visiting a winery

Visit Britain MIDAS Report December 2022.

## Potential pool of 16m visitors

Based on 38m visitors visiting the UK in 2023, VisitBritain annual report.





## Wine tourism accounts for 25% of total income

WineGB Industry Survey 2024.

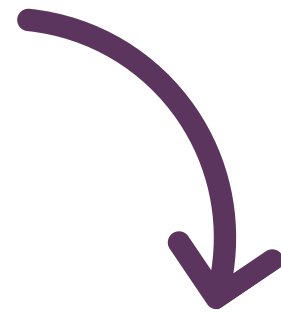


## Significant growth and investment forecast\*

WineGB Industry Survey 2024.



**60% of WineGB  
Industry Survey  
respondents  
expect over 20%  
growth in visitor  
numbers in next  
five years**



**60% of WineGB  
Industry Survey  
respondents plan  
to invest in wine  
tourism in next year**

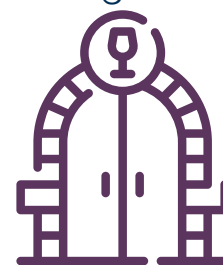
**Top three targets of  
investment: food  
offerings, on-site  
events, and  
accommodation**



# INDUSTRY NEEDS: 7 ACTIONS TO GROW WINE TOURISM

WineGB is looking to the next Government to secure support for our sector and ensure our producers can grow their tourism offerings. Wine tourism is a core part of our Manifesto for Growth. It is our rallying document that outlines the activities that the sector and WineGB is undertaking to encourage growth, and the policies which policy makers can adopt to accelerate the sector. We have also joined the Tourism Alliance to be part of a collective voice to draw attention to our sector and the issues it faces. Earlier this year, we organised the Tourism Alliance Annual Conference and Parliamentary Reception, further increasing the visibility of our issues.

## 1) Cellar Door Duty Relief



**A better and more supportive excise system and the introduction of a Cellar Door Duty Relief Scheme.**

- **Introduce a fairer tax regime for English and Welsh wine and address the competitive disadvantages which our sector contends within the UK.**
- **Introduce a Cellar Door Duty Relief Scheme to drive sales and support tourism.**

A fairer tax regime for English and Welsh wine would address the competitive disadvantages which our sector contends with in the UK. One element, directly relevant to wine tourism, would be the introduction of an English and Welsh Cellar Door Duty Relief Scheme modelled on the Australian scheme of the same name to drive sales and support tourism.

This would be a game changer for encouraging rural investment and employment. A successful scheme would encourage investment in infrastructure, employment, and tourist facilities by vineyards and wineries across England and Wales. Our members have stated clearly that revenue raised through such a scheme would be re-invested directly back into their business.

The fairest way that a Cellar Door Duty Relief Scheme could be introduced would be for a maximum volume that could be exempt, thus enabling every English and Welsh wine producer, regardless of size, to benefit from the scheme.

## 2) Promotion



### More accessible and better funded tourism promotion partnerships.

- **Make Local Visitor Economy Partnerships and other local tourism organisations accessible to micro and small sized businesses.**
- **Increase national tourist boards' budgets so that they can compete on a level playing field with other tourism destinations.**

Most vineyards and wineries offering a tourism experience are micro, small, and medium sized enterprises. Local Visitor Economy Partnerships (LVEPs), Destination Development Partnerships (DDPs), and other local, regional, and national tourism promotional bodies need guaranteed funding from the public sector to enable them to support small and micro businesses in their areas.

Currently, many LVEPs are highly dependent on commercial income and therefore have the difficult challenge around membership fees being at a level that enables them to exist. These fees are around £500+ with additional fees ranging from £699 to £1,999 to gain access to the services. This therefore can make it difficult for some smaller and micro businesses to access their services. Public sector funding would provide a basis for LVEPs to serve the wider community of businesses and support the growth of vineyards wishing to expand their tourism footprint.

We would like to see the Destination Development Partnerships funded by national government to ensure that products and skills are developed across larger geographical areas, giving businesses access to more trained staff and overseas markets.

A second policy change which would assist the English and Welsh wine tourism offering would be increasing our national tourist boards' budgets so that they are at levels comparable those that other major global tourism destinations work with.

VisitBritain, VisitEngland, and Visit Wales are operating on promotion support and marketing budgets which, due to inflationary pressures and budget cuts, are significantly lower than those given to competitor agencies in neighbouring European countries. Reinstating or increasing budgets would give the UK a fairer shot. As a baseline we want to put the UK on a level playing field with competitor destinations in the rest of Europe.



# 3) International benefits



**Make it easier for domestic and international tourism to happen.**

- **Reintroduce tax-free shopping for international visitors to the UK.**
- **Make entry visas more affordable and in line with other major global tourism destinations.**
- **Waive the Electronic Travel Authorisation fee for transiting passengers, over 70s and under 18s, and visitors to Northern Ireland.**

Policy decisions and changes need to encourage domestic and international tourists to visit England, Wales, and the wine tourism regions in both countries.

Fewer international tourists are visiting the UK and those that come are spending less here than they were pre-pandemic. One reason for this is the 2021 decision to scrap the VAT Reclaim Scheme and Airside Tax-Free Shopping Scheme (i.e. tax-free shopping) for international visitors.

British residents are also spending less in the UK, instead choosing to take advantage of tax-free shopping in the EU to which they now have access.

A decision should be taken to reintroduce tax-free shopping for all tourists, which would allow the UK to re-establish itself as a global shopping destination.

Tourists are also hampered by the excessive cost and bureaucratic burden on those visiting the UK compared to other countries. The cost of a single or multi-entry visa for the UK is significantly higher than Australia (£99), Canada (£60), the EU (£69) or the USA (£150)[1]. Entry visas to the UK range in cost from £115 for a single entry to £400, £771 and £963 for multi-entry visas of two, five, and ten years respectively.

A third reason is the Electronic Travel Authorisation (ETA) system. Currently all non-visa passengers (including those under the age of 18 and over 70) arriving in the UK will require an ETA including transit passengers. By waiving the ETA fee for transiting passengers, over 70s and under 18s, and visitors to Northern Ireland, the UK automatically becomes a more viable travel option.

[1] Page 13, UKinbound Manifesto 2024.

VisitBritain enabled us to put vineyards in front of more than 120 international travel trade buyers as part of its flagship 'Showcase Britain 2024' trade event.

Buyers from 18 international markets including from the USA, the UK's largest and most valuable tourism inbound visitor market, as well as from Australia, Austria, Belgium, Brazil, Canada, China, France, Germany, the Gulf Co-operation Council (GCC) countries, India, Italy, Japan, the Netherlands, New Zealand, the Nordic countries, South Korea and Switzerland.

We welcome the continued support from VisitEngland/VisitBritain to enable us to champion wine tourism globally.

## 4) Better planning



### Better planning and development: Policy – Education – Resourcing

- **Introduce more consistency into the English and Welsh planning system by properly staffing and resourcing it.**
- **Allocate vineyard/winery planning applications to a planning officer who has knowledge of wine, viticulture, and the business model accompanying it.**

The current state of the planning process is a source of immense frustration to vineyards looking to invest in their wine tourism experience and a postcode lottery seems to apply when it comes to planning permission. A planning experience depends entirely on the District Council and local variables, such as:

- The experience and expertise of the planning officer.
- Their exposure to wine/vineyards/wineries.
- If changes to the vineyard fall under permitted development.
- How well planning departments liaise with legal departments on planning decisions.

There needs to be more consistency in the whole planning process. Planning departments need to be staffed and properly resourced to be able to do their job. Vineyard/winery applications should be allocated to a planning officer who has knowledge of wine, viticulture, the business model, and the issues a new vineyard faces. Get it right and the benefits will accrue for everyone including the local community.

# 5) Training and skills



## Targeted and increased training and skills.

- **Enhance cooperation and coordination between Government, local Councils, education providers, and the sector to identify the specialist needs required to deliver a premium wine tourism experience.**
- **Tailor courses to meet the range of demands of micro, small, medium, and large wine businesses.**

To grow wine tourism and deliver increased employment, vineyards and wineries in England and Wales will require more skilled workers with specialist knowledge to support viticulture across a variety of disciplines. The sector is working closely with Government and education providers such as the world renowned Plumpton College to develop courses that meet the future needs of the wine sector and support long term career development.

From a wine tourism perspective, that means employees trained in hospitality and tourism and equipped with skills such as business, finances, e-commerce, CRM, wine knowledge, customer service, strategy development, and tour guide planning and delivery. Delivery of related education and training must be sufficiently tailored to meet the disparate demands of micro, small, medium, and large wine tourism offerings and their employees. It must also be accessible from and in all the wine producing areas of England and Wales as a contribution to levelling up.

Ensure coordination, cooperation, and financial assistance between the Government, local Councils, education providers, and vineyards and wineries. This would help create a pool of home-grown, geographically dispersed, skilled employees that can help ensure the UK continues to be competitive in the international tourism market.



## 6) Rural infrastructure



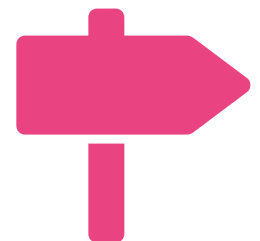
Improve rural infrastructure.

- **Prioritise investment in improving local infrastructure (transport, energy, water. and communications) across England and Wales.**

Much of what might help grow English and Welsh wine's tourism offering would also benefit and help other sectors and rural localities. Nothing epitomises this more than improvement to rural infrastructure, be that physical infrastructure such as transport, energy and water or digital such as communications. Capable and reliable infrastructure is key to the success of any business, not just vineyards and wineries.

UK infrastructure is falling behind that in other countries with whom we compete for tourism business. Our local/regional buses and trains, rural road links, connections to the electrical grid, broadband and WIFI availability, mobile telecom connectivity etc. all require upgrading.

## 7) Signposting signposts



Make signposting accessible.

- **Make destination signposting affordable (to vineyards/wineries) and therefore accessible (to tourists) on the open road.**

The current fees charged by the National Highways (Highways England) and local councils to properly signpost (normal and brown tourism direction signs) a vineyard/winery are astronomical (circa £20,000 to £30,000 on average for brown tourist signage). It might seem like a small issue, but better signage pointing potential visitors to where they can find a vineyard is vital. However, a high proportion of English and Welsh vineyards/wineries cannot afford the installation costs.



# 'PLACEMAKING' IN THE WINE INDUSTRY

In our first series of WineGB regional roadshows in 2024, 150 members received training from Knight Frank on the concept of placemaking and how this applies to the UK wine production industry.

The Project for Public Spaces, a non-profit with a passion for public spaces, defines placemaking as “a way to reimagine public spaces as the heart of a community, and to strengthen the connection between people and the places they share.”

Well designed places experience greater levels of footfall, longer dwell times, and repeat visits. They meet the needs of their community, often have a cultural, horticultural, artistic or musical influence, and provide plenty of freely available seating.

Ed Mansel Lewis, Head of Viticulture at Knight Frank, shared the three ways that placemaking can be applied to vineyards and wineries in order to boost wine tourism.

## The Anchor

At the heart of any great place is its anchor; the key feature which people remember from their experience, describe in detail when telling friends about their visit, and which draws them back. For a vineyard, it may be the vines themselves, or the cellar door if it has a large patio or mezzanine overlooking the vines. It's important to define the anchor, as any complementary uses or activities need to link to it.



# Power of 10+

The idea behind the concept of the Power of 10+ is that places thrive when people have many of reasons to be there. These might include benches to sit on, wildflower meadows to walk through, outdoor sculptures to touch, music to enjoy, artisan produce to eat, art to appreciate, and likeminded people to meet. Ideally, these complementary activities should be unique to that place, link to the anchor, and also reflect what is special about that region from a cultural or historical perspective.

For each vineyard there will be a slight nuance to what their anchor is, and what the connecting uses within the power of 10+ should be. If the anchor was the vines, then the connecting uses may be benches overlooking the view, wildflower walks around the vineyard's perimeter, or wooden cut-out frames for people to take photos of themselves with the vines in the background. If the anchor was the cellar door, the connecting uses may be guest musicians, or a local artists' work for sale on the walls, or a collaboration with pop-up artisanal food vans parked beside the patio.

The beauty of this is that it can be done inexpensively. It can cost as little as the price to buy and hang a swing that looks over your favourite view of the vines. You may even get paid a commission of each art sale if you agreed to host an exhibition for a local artist. It would cost you nothing to block out two car parking spaces and invite a charcuterie van to sell their meat from your vineyard. The other key benefit of partnering with other suppliers is that their customer may find you for the first time. Acquiring new customers can be an expensive business, so if collaborating with complementary suppliers allows you to achieve the Power of 10+ and lower your customer acquisition cost, then it is an opportunity worth exploring.

## Placemaking at every scale

Some readers with a small acreage of vines and no permanent building to run their cellar door may not think this applies to them. I disagree. Placemaking works just as well at the site level as it does at the city and county levels. Therefore, you may be able to collaborate with a local cultural, heritage destination as well as accommodation and travel providers to create a packaged experience which includes a visit to your vineyard while people make a weekend of it, enjoying the breath of amenity in your local area.





# VISITENGLAND TRAINING



WineGB has partnered with VisitEngland on a series of wine tourism training sessions to prepare our sector for growth. Combining Australian vineyard know-how with British tourism expertise, VisitEngland have secured and adapted Wine Australia's wine tourism training programme to be rolled out across our regions.

A successful pilot session as held at Plumpton College was held in March 2024 with future sessions planned. VisitEngland recognises the value and importance of wine tourism, and we are grateful to their expert training team in building and supporting these workshops.

This training programme is designed to support English wine producers develop vineyard experiences which will appeal to the lucrative and ever-growing inbound tourism market.

In 2022, inbound tourism contributed a staggering £106 billion to the UK economy, with £22.6 billion spent in England alone. With projections indicating continued growth in our sector, the opportunities for expansion are significant. And with wine tourism accounting for a quarter of UK vineyard income, we are committed to helping our members get a larger slice of the £22.6 billion inbound tourism spending pie.

The training programme covers essential modules designed to enhance understanding and skills, including:

## **1. Understanding the volume and value of the inbound tourism industry and the growth opportunities within this market**

There are significant growth opportunities available from the inbound tourism market – with 38 million visits and £31.1 billion spend by inbound tourists. The market research insights exist that show how vineyards and wineries maximise these opportunities.

## **2. Understanding the inbound tourists' motivations and buying behaviour**

Inbound tourists differ from domestic tourists with longer stays and higher spends. If wine producers can identify and satisfy their target markets, they can keep on top of trends in order to stay competitive.



VisitEngland®

### 3. Creating compelling wine experiences

Finding the **Unique Value Proposition** (UVP) will enable vineyards and wineries to best position themselves. This is both as a business and their region. This UVP will enable them to select target markets and tailor their experiences to the right audience. Producers learn how to extend their customer base by making experiences inclusive and accessible, implementing sustainable tourism practices, and enhancing the visitor journey to encourage repeat visits.

### 4. Exploring the tourism distribution system and developing key relationships

VisitEngland's workshops provide guidance on developing relationships and increasing visibility within tourism channels and creating bookable activities.

They also explain the value in attending trade shows and how to develop and maintain effective partnerships with tourism companies and local businesses to provide cross-promotion opportunities.

### 5. Understanding the cost of distribution

There are costs to consider to budget for tourism distribution. This includes payments to intermediaries such as tour operators or travel agents. These need to be fully factored into the price. Equally, understanding how to price wine products and experiences to match the expectations of these intermediaries is key.

### 6. Promoting your product effectively

VisitEngland's workshops also explore the different marketing channels available to wine producers, particularly how digital marketing strategies such as search engine optimisation (SEO) and pay-per-click (PPC) advertising is used to reach more potential customers. Attendees will also gain an understanding of asset rights to ensure they comply with the law.





# THE WINEGB GUIDE TO UK WINE TOURISM – PREVIEW

To help you plan your August Bank Holiday, we will publish the second of our two tourism publications: The WineGB Guide to UK Wine Tourism. This guide will showcase producers who are working together in our regions, developing tourism partnerships with local businesses, running sell-out tours and tastings, providing cultural experiences, championing sustainability, excelling in hospitality, and offering something fun and unique. From winery slides and wine trains to festivals and wildlife walks, the UK wine tourism experience is diverse and unique.

The guide will have a dual purpose:

1. To provide the wine-loving public with a list of potential excursions for the August Bank Holiday and beyond.
2. To provide examples of best practice so our producers can learn from each other, develop their wine tourism experiences, and grow together.

We'll be featuring the very best experiences on offer, so polish your wine glasses, dust off your summer hat, layer on the sun cream - its time to get out into the countryside (urban wineries are also available...).







## CONTRIBUTORS AND IMAGES

Contributors: Sam Linter, Nicola Bates, Phoebe French, Vincent McGovern, Mark Laughton, Ed Mansel Lewis (Knight Frank).

Images: Gusbourne (front cover); Simpsons' Wine Estate (page 13); Nutbourne (page 15); Balfour (page 16); Amber Valley Vineyards (page 18); L-R: Lympstone Manor, Simpsons' Wine Estate, Denbies, Vineyards of Hampshire, Oastbrook, Albury Organic Vineyard, Wiston Estate, and Tinwood Estate (page 19); and Ashling Park (back cover).

For more information, please contact [office@winegb.co.uk](mailto:office@winegb.co.uk)

**WINEGB**  
WINES OF GREAT BRITAIN

English  
Wine Week  
15<sup>th</sup> - 23<sup>rd</sup> JUNE 2024

