



WINE TOURISM IN AN EMERGING VITICULTURAL COUNTRY – BENEFITS AND CHALLENGES FROM THE PERSPECTIVE OF POLISH WINEMAKERS

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Abstract

The article focuses on wine tourism in Polish vineyards, which has been developing very dynamically in recent years, and aims to look at this phenomenon from the perspective of winemakers. It seeks to explore the primary motivations of winemakers for initiating enotourism activities and to analyse potential factors that support or hinder the development of tourism functions. The study is based on quantitative and qualitative research which involved direct on-site observations, source analysis, and a diagnostic survey that included questionnaires and interviews with winemakers. The primary reasons for introducing tourism offerings by winemakers, often concurrently with the very inception of the vineyard and the commencement of wine production, are the desire to increase direct sales, promote the brand, and establish and maintain relationships with customers and the local community. Many winemakers plan to expand their tourism activities, particularly in terms of accommodation services. However, current obstacles include high investment costs (especially related to the introduction of accommodation and catering services), shortage of appropriate personnel, lack of time, and difficulties in balancing vineyard work with tourist services.

Keywords

wine tourism • enotourism • tourism offer • vineyard management • winemakers • benefits • challenges
• local development • Poland

Introduction

Wine tourism, also known as enotourism, is an important component of the winemaking industry (Hall et al., 2009). It has been defined in a variety of ways (Carlsen, 2004; Głąbiński, 2023); however, its core elements typically include visits to vineyards and wineries, participation in wine festivals and exhibitions, wine tasting, and the broader experience of the distinctive features of a wine region (Hall et al., 2009). Although wine tourism is commonly classified as a form of culinary or gastronomic tourism (Getz, 2000), its strong educational and experiential dimensions have also led to its association with cultural and cognitive tourism (Kowalczyk, 2003; Hall et al., 2009; Mazurek, 2022), particularly in the context of the Old World. From a spatial perspective, wine tourism is most frequently conceptualized as a form of rural tourism (Kastenholz et al., 2023).

Wine tourism has long been practiced in traditional wine-producing countries of Europe such as France, Italy, Spain, and Germany, as well as in the so-called New World regions, including California (USA), Australia, and South Africa, and is currently experiencing further growth (Szolnoki et al., 2023). This form of tourism is also becoming increasingly popular in countries where winemaking is still in its early stages of development and vineyards are relatively new establishments (Schernewski, 2011). Among such countries in Europe are the United Kingdom, Denmark, southern Sweden, and Poland.

While the tradition of viticulture in Poland dates back to the Middle Ages, as evidenced by place names referring to winemaking (e.g., Winna Góra, Winnica, Wińsko) and vine symbols in the coats of arms of several towns (e.g., Środa Śląska, Wińsko, Mściwojów in Lower Silesia; Strzelce Opolskie, Głogówek in Opole Voivodeship; Jastrowie in Greater Poland; and Potczyn-Zdrój in West Pomerania), winemaking largely disappeared in the country, particularly after World War II. However, since the political and economic transformations of the 1990s, and especially

following Poland's accession to the European Union, there has been a significant resurgence of interest in both winemaking and wine tourism.

This renewed interest in winemaking in Poland is driven by several factors. Changes in alcohol consumption patterns (Mazurkiewicz-Pizło & Pizło, 2018), the introduction of resilient grape varieties, and the increasingly evident effects of climate change favouring vine cultivation (Kunicka-Styczyńska et al., 2016; Maciejewska et al., 2024) have all contributed to the sector's growth. Furthermore, legal reforms and European Union initiatives aimed at revitalizing rural areas have provided critical support for the winemaking industry. The efforts of wine associations and organizations have also played a substantial role in advancing Polish winemaking (Mazurkiewicz-Pizło, 2013, 2014).

The wine market in Poland is governed by the Act of May 12, 2011, which regulates the production, bottling, and trade of wine products (Journal of Laws 2018, item 1159). According to this legislation, wine production from grapes harvested in Poland for commercial purposes requires registration in a database maintained by the Director General of the National Support Centre for Agriculture (KOWR). According to this database, in 2023 there were 530 vineyards registered, covering 811 ha in total, whereas analogous figures for the year 2010 were only 20 and 37 ha, respectively.

Despite the relatively small scale of viticulture in Poland, vineyards have locally begun to shape the rural landscape and contribute to the economy of these areas, particularly through their integration into the tourism sector. The development of winemaking and wine tourism in Poland is increasingly recognized as an opportunity for diversifying rural economic activities and promoting the sustainable development of rural areas (Kubal & Pizlak 2010; Mazurkiewicz-Pizło 2023). In fact, wine production has already become a hallmark of specific regions, as reflected in their regional promotional strategies (Leszkowicz-Baczyński, 2020). Many vineyards, even those

that are young and small, have responded to growing demand by incorporating tourism services into their operations (Dylik-Ostrowska et al., 2021; Kapczyński, 2021). These services go beyond traditional guided tours and wine tastings and include educational workshops and cultural events. These developments appear to be at variance from the established wine-producing countries, where the focus had long been on winemaking itself, with a limited role of outreach, whereas the emphasis on experience and long traditions is now at the core of the tourism product of individual vineyards. Therefore, it is reasonable to assume that the decision to offer tourist services has been particularly challenging for Polish winemakers, who are newcomers in this business. These initial observations provoked a series of research questions regarding the involvement of winemakers in the tourism market since the beginning of their wine production operations. These key questions are the following. What motivates Polish winemakers to engage in tourism services? What benefits do they expect from this type of activity? Do they plan to further develop tourism services, and if so, what additional services are they considering? Finally, what do they see as the major obstacles to the growth of their wine tourism offerings?

While the study focuses on the supply side of wine tourism, it complements existing research which predominantly explores tourist motivations and behaviour. By analysing the perspectives of winemakers, this article provides insights into how tourism offerings are shaped in response to perceived or anticipated demand in an emerging wine tourism market. In doing so, it contributes both theoretically – by highlighting supply-side dynamics in early-stage wine regions – and practically, by identifying actionable areas for support and development.

These issues are addressed in this paper, which primarily aims to contribute to better understanding of the tourism space in Poland, investigating further a phenomenon of wine tourism which is relatively new but apparently with good opportunities for further growth.

The perspective of service providers is made central in this analysis.

Global background

Wine tourism gained popularity in the 1980s and 1990s (Carlsen & Charters, 2006), but its roots can be traced back to much earlier times. Some researchers identify the origins of enotourism in the travel traditions of European aristocracy known as the Grand Tour, typical for the 17th-19th centuries (Hall et al., 2009), when vineyards in Italy and France already featured in travel itineraries. In the 1920s, the first wine routes were established in Germany, and over time, more vineyards in various regions around the world began inviting tourists (Hall et al., 2009). Along with the increasing popularity of enotourism, especially at the turn of the 21st century, numerous academic works focused on this phenomenon were published (see Carlsen (2004) for a review of an early stage of research), both in countries with long-standing winemaking traditions, such as Georgia, France, Italy, Spain, Greece, and Germany (e.g., Alonso & O'Neill, 2009; Marzo-Navarro & Pedraja Iglesias, 2009; Tafel & Szolnoki, 2020), as well as overseas, where winemaking has much shorter history, including New Zealand, Australia, South Africa, Chile, Argentina, and California in the USA (Dodd & Beverland, 2001; Carmichael, 2005; Baird, et al, 2018; Sun & Drakeman, 2022).

Tours aimed at exploring vineyards and involving wine tasting are also organized in regions where viticulture has been introduced relatively recently, in countries not typically associated with wine culture. These regions include southern Canada (Poiras & Getz, 2006; Dawson et al., 2011), southern England (Howley & van Westering, 2008), Denmark and southern Sweden (Schernewski, 2011), and Poland (Sidorkiewicz, 2023). The shift of geographical boundaries of viticulture was made possible due to ongoing climate changes (Schernewski, 2011; Myga-Piątek & Rahmonov, 2018) and the introduction of hybrid grape varieties, more resistant to adverse

weather conditions. In the aforementioned countries, viticulture occupies a relatively small area, and most vineyards can be classified as boutique wineries. Nevertheless, they attract media attention and, simultaneously, the interest of tourists.

As Carlsen and Charters (2006) emphasized, a wine region does not automatically become an enotourism destination. Appropriate infrastructure and specialized offerings for tourists, requiring adequate preparation and skills, are essential. Moreover, to establish wine tourism as a recognizable brand product of the region, marketing efforts, collaboration between winemakers, and organizational support from local governments and tourism organizations are necessary (Telfer, 2001; Bruwer, 2003; Mazurkiewicz-Pizło, 2014).

However, the efforts and investments in developing enotourism can bring tangible benefits for both winemakers and the wine-growing regions. They include: (a) gaining a competitive advantage for the region where vineyards are located and wine production takes place; (b) profits for businesses directly and indirectly related to wine production, as well as for companies serving tourists; (c) increased employment and revenues for local governments related to increased tourism; (d) support for the multifunctional development of rural areas; (e) creation of a positive regional image based on local products and traditions; (f) revitalization of economically declining regions (Mazurkiewicz-Pizło, 2013; Lourenço-Gomes et al, 2015; Montella, 2017; Senkiv et al., 2022). Among other social benefits of enotourism is its educational dimension, not only in terms of viticulture and wine production processes but also in a broader context of environmental and cultural education (Pijet-Migoń & Migoń, 2021). This aligns with the position that enotourism may be classified as part of educational tourism (Williams, 2001; Williams & Kelly, 2001).

Many studies focus on the demand side of enotourism and the socio-demographic profile of enotourists (e.g., Roberts & Sparks, 2006; Dawson et al, 2011; Mason & Paggiaro, 2012; Carlsen & Boksberger, 2015; Garibaldi

et al., 2017; Thanh & Kirova, 2018). There have also been studies presenting wine tourism from the perspective of wine producers (e.g., Koch et al., 2013; Nicolosi et al., 2016; Francioni et al., 2017). These highlight that enotourism can provide an additional source of income, contributing to its diversification, which may be significant in years when grape harvests and, consequently, wine production are lower (López-Guzmán et al., 2011). Additionally, from the winemakers' perspective, it is important that enotourists often spend more money than an "average" tourist (Colombini, 2013). Direct wine sales at vineyards ensure immediate cash income with unbeatable profit margins (Getz & Brown, 2006; Colombini, 2015). Successful visits to vineyards, providing unique memories of visited places, help build customer loyalty to the brand and the region (Dodd & Beverland 2001).

Within a broad theme of sustainable development at the regional scale, the role of enotourism was also pointed out. If skilfully developed, it can be sustainable and contribute to the preservation of natural, cultural and social resources (Torquati et al, 2015; Karagiannis & Metaxas, 2020; Leszkowicz-Baczyński, 2020; Pijet-Migoń & Królikowska, 2020; Oltean & Gabor, 2022; Trigo & Silva, 2022; Szolnoki et al., 2023).

While wine tourism in well-established wine-producing countries of both the Old and New Worlds has been the subject of extensive academic research and numerous publications, relatively few scholarly works have addressed the specific characteristics of the rapidly developing wine tourism sector in emerging cool-climate wine regions such as the United Kingdom, Denmark, southern Sweden, and Poland. The growth of viticulture in these areas has been documented in studies on climate change (e.g., Schernewski, 2011; Jones & Schultz, 2016; Nesbitt et al., 2018); however, the topic of wine tourism has primarily been examined in industry reports rather than in academic literature.

Whereas wine tourism in Denmark and Sweden remains a niche phenomenon (Vos,

2019; Kompaniets, 2022), England and Wales present a markedly different picture. In 2024, there were 1,030 registered vineyards in these countries, with vine cultivation covering more than 4,200 ha. The number of visitors to vineyards and wineries was estimated at approximately 1.5 million (WineGB, 2024). Initially, English wine producers offered only limited tourism services, such as vineyard tours and wine tastings (Richardson, 2004; Howley & Van Westering, 2008). However, in recent years, there has been a significant expansion of the wine tourism offering, including increased collaboration among winemakers, the formation of wine associations, and the development of joint initiatives, as evidenced by the creation of wine routes and wine festivals (Ritchie & Webber, 2013; WineGB, 2024). Many vineyards have also established high-quality accommodation facilities and expanded their gastronomic

infrastructure. Industry reports (WineGB, 2024) emphasize the growing importance of wine tourism for the rural economy.

Wine tourism in Poland – state of the art and research gaps

In Poland, interest in winemaking began to grow significantly only after the political transformations of the 1990s. A notable development of wine tourism followed in the second decade of the 21st century, accompanying the dynamic growth of the Polish winemaking industry (Mazurkiewicz-Pizło & Pizło, 2018). Today, vineyards are present in all voivodeships of Poland, not only in traditional wine regions such as Zielona Góra (Lubuskie) region, Małopolska region, Fore-Carpathian region, and Lower Silesia, but also in the northern and northeastern parts of the country (Fig. 1).

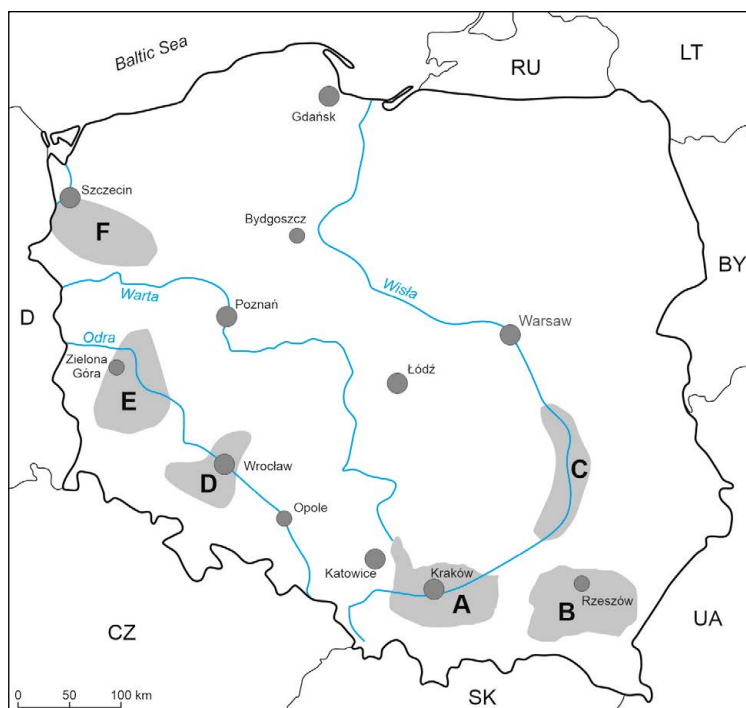


Figure 1. Wine regions of Poland. A – Małopolska Region, B – Fore-Carpathian Region, C – Małopolska Vistula Gap, D – Lower Silesia Region, E – Lubuskie Region, F – West Pomeranian Region

Early scientific publications on wine tourism phenomenon primarily focused on the emerging enotourism offerings (Kosmaczewska, 2006; Dubińska, 2013; Olszewski & Drózd, 2013). Particular attention was given to the development of wine routes (Kowalczyk, 2003; Kosmaczewska, 2008; Rogowski & Kasianchuk, 2016; Kruczek, 2018), as well as festivals and wine-related events (Krupa & Stokłosa, 2015). These studies also addressed the opportunities and challenges associated with the development of wine tourism (Mazurkiewicz-Pizło, 2012; Smogór, 2012).

In addition to these early analyses, factors driving an increased interest in winemaking and enotourism were examined (Kosmaczewska, 2006) and prospects for further development of wine tourism in Poland in the context of legal changes and European Union programs were explored (Pink, 2017; Reformat, 2018). Further studies highlighted the links between enotourism and culinary tourism (Plebańczyk, 2013), emphasizing their relevance in the context of contemporary tourism trends, such as the search for authenticity and place identity. Simultaneously, the significance of innovative tourism offerings was underscored (Pijet-Migoń & Królikowska, 2022).

It has been consistently pointed out that well-developed enotourism aligns with the principles of sustainable development (Widawski & Oleśniewicz, 2014) and can act as a catalyst for the activation of rural areas (Jeziorska-Biel et al., 2021). Moreover, the potential for enotourism development in urban areas, particularly in suburban zones where vineyards are located, has been recognized (Kofek, 2023).

While many studies have focused on specific regions of Poland, such as the Lubuskie Region (Charzyński et al., 2013; Poczta & Zagrocka, 2016), the West Pomeranian Region (Głubiński & Koźmiński, 2019), Lower Silesia (Pijet-Migoń & Królikowska, 2020; Kołodziej, 2022), and the Małopolska Vistula Gap (Krukowska, 2023), there are also comprehensive analyses addressing wine tourism on a national scale (Kubal & Piziak, 2010;

Mazurkiewicz-Pizło, 2013, 2023; Kapczyński, 2021; Sidorkiewicz, 2023).

Further studies have examined the profile of Polish enotourists (Mazurkiewicz-Pizło, 2015; Charzyński & Podgórski, 2017; Zawadka, 2018), the growing interest in enotourism (Charzyński et al., 2013), and the impact of wine tourism on regional economies and competitiveness (Mazurkiewicz-Pizło, 2010; Perechuda & Hołodnik, 2016; Greinert et al., 2019; Leszkowicz-Baczyński, 2020). They have also showcased effective modern methods for promoting culinary tourism, including enotourism (Szpara & Gwóźdź, 2011).

A broader perspective on the management of winemaking and enotourism in Poland has emerged in recent years. This includes analyses of wine consumer and enotourist profiles, as well as the role of social media in promoting winemaking and enotourism through relationship-building (Mazurkiewicz-Pizło, 2023). The importance of collaboration among winemakers within dedicated associations and the support of tourism organizations in promoting enotourism have also been emphasized (Mazurkiewicz-Pizło, 2014; Sidorkiewicz, 2023).

In contrast, relatively few studies have examined the views of the winemakers themselves, including potential benefits and barriers associated with the development of wine tourism (Mazurkiewicz-Pizło, 2013; Jeziorska-Biel et al., 2021). The present article seeks to address this research gap by analysing these underexplored aspects and providing new insights into the opportunities and challenges faced by the wine tourism in Poland.

Research design and methods

The authors of the study, using different techniques of data collection, intended to obtain multiple perspectives on the same phenomenon (the so-called triangulation of research methods), which should contribute to the depth and detail of the study. Therefore, the empirical component of the research was divided into two parts:

1. The first part of empirical research involved direct observations at selected vineyards

and source-oriented desk research (document analysis, exploration of industry reports and internet portals). The first part of the Results section is built upon this analysis.

Vineyard selection for field visits was based on regional diversity and accessibility, as well as previous professional contacts and available promotional materials. Over twenty five vineyards were visited in person between August 2022 and July 2023. Observations were participatory and non-structured in nature. Researchers engaged with vineyard owners and staff, took field notes, photographs, and collected leaflets and brochures on-site. Reflections from these visits were documented in research diaries shortly after each visit to ensure accuracy.

2. The second part of the study focused on collecting quantitative and qualitative data via an online survey conducted between May 2022 and February 2023, using the Microsoft 365 platform.

The questionnaire was accessible from May 2022 until February 2023. The invitation to participate in the survey was sent, along with the link to the online questionnaire, to all vineyards, which were registered in the official Register of Vineyards managed by the National Support Centre for Agriculture (www.kowr.gov.pl) and were either involved in wine sale in the economic year 2021/2022 in agriculture, or intended to join the sales market. The register included 376 vineyards, yet it was subject to verification using other sources of information, wine-related Internet portals, and previous research of the authors. In effect, taking into account repetitions (several plots in different localities belonging to one vineyard) and vineyards which terminated their activity in the meantime, the number of active vineyards involved in vine cultivation and wine selling was reduced to 308. Requests to fill the questionnaire were sent to all these vineyards. Thus, the sampling was neither probabilistic nor quota-based; instead, the questionnaire was distributed

to all identified and active vineyards (total enumeration approach). The authors analysed all completed and returned questionnaires. Due to this non-random sampling method and the exploratory nature of the study, the results cannot be generalized to the entire population of Polish vineyards. For this reason, although statistical inference testing was conducted, it did not reveal any significant relationships – a common occurrence in exploratory research of this nature. Therefore, the interpretation of results relies primarily on descriptive statistics and observed tendencies within the data (Marczyk et al., 2005: 209).

The questionnaire was comprehensive in nature, with questions addressing various aspects of vineyard operations, not limited to their tourist function. Thus, only the results of the analysis focused on the tourism offerings and enotourism are presented in this article. Specifically, the analysis addresses responses to four main survey questions: Is there a possibility for tourists to visit your vineyard? What types of wine tourism services do you offer? In your opinion, what are the main benefits of running wine tourism activities? What was your personal primary motivation for undertaking/planning wine tourism activities?

Quantitative data were analysed using descriptive statistics, including frequency distributions and cross-tabulations. For selected variables, chi-square tests were used to explore response distributions and potential relationships between categorical variables. Open-ended answers regarding the range of wine tourism services were manually coded using a thematic approach. An inductive process was applied first to identify recurring patterns in the responses. These patterns led to the development of an initial set of categories, based on commonly mentioned service types such as wine tastings, vineyard tours, workshops, or accommodation. Each response could be assigned to multiple categories depending on the scope of services described. The final set of categories ($n = 20$) reflected both widely offered and niche

services. In the next step, this categorization was verified deductively by re-checking all answers against the established scheme to ensure consistency. Frequencies of each category were subsequently calculated for quantitative comparison. This two-step procedure ensured internal consistency and enhanced the reliability of the interpretation. Due to the exploratory nature of the study and the non-random sampling, no further inferential statistics were applied.

Contact data were retrieved from the Eno-tourist Guide "Polish Wine" (Dylik-Ostrowska et al., 2021), wine-related Internet portals, official websites of vineyards, and social media. Since the return rate of questionnaires was initially rather small, reminder letters were sent twice in September-October 2023. In addition, direct phone calls were made and informal meetings with wine owners were used to encourage participation. In the end, 75 wineries took part in the survey, which represented more than 24% of the total number of Polish wineries. This return rate is considered sufficient to attempt an analysis, but disparities in return rates at the voivodeship level prevent any informed exploration of possible regional differences. Moreover, given sensitivity of information related to ongoing business, questionnaires were anonymized and the responses did not contain data allowing for easy identification of a respondent (such as the size of vineyard), except the voivodeship.

In the discussion section in the article we refer to the research findings arising from the survey and additionally include qualitative data obtained through direct observation. The observation was of an implicit, participatory nature. In addition, one of the co-authors of the paper is a member of the board of directors of a regional winemakers' association and therefore has an up-to-date knowledge of the issues raised in the article.

In the article, the term "vineyard" refers to the entire business enterprise, unless the context clearly indicates that it is pertinent to the land plot, where grape cultivation is taking place.

Results

Main components of the tourist offer of Polish vineyards

According to the analysis of available sources (data and reports published by the National Support Centre for Agriculture, wine-related websites – e.g., Winogrodniczy.pl, Enoportal.pl, websites and social media platforms of regional associations of wine producers), the fundamental component of the Polish enotourism offer are the vineyards themselves, which welcome tourists for visits, allowing for participation in wine tastings and acquaintance with products made on-site. These vineyards vary significantly in size, catering to different groups of visitors. Large vineyards in Poland are defined as those covering over a dozen hectares (the largest vineyard spans 41 ha), while medium-sized vineyards, with areas of up to 10 ha, are still capable of accommodating tourist groups. Conversely, small boutique vineyards, typically around 1 ha in size, are tailored to meet the needs of individual tourists (Sidorkiewicz, 2023). According to a Polish wine-growing portal, the average size of a Polish vineyard is 1.45 ha (www.winogrodniczy.pl, 2024). Regardless of their size, vineyards are beginning to play an increasingly significant role in promoting rural tourism development.

Most vineyards offer guided tours combined with wine tastings and the opportunity to purchase wine products, and they have been doing so almost from the outset of their operations. Despite the prevalence of these services, their availability is often limited, as most vineyards operate by prior appointment. These appointments are usually scheduled on non-working days and require a minimum number of participants (typically six). Only a small number of places in Poland stay open and accept visitors on fixed days and during specified hours.

In addition to tastings and tours, Polish winemakers organize leisure and recreational events such as picnics and festivals, as well as cultural activities, including concerts, open-air art exhibitions, or travel-themed meetings. They all require more extensive infrastructure,

such as large outdoor spaces, indoor halls, or parking facilities, which limits the number of such events. Some vineyards offer packages that include tours of the surrounding villages or collaborate with other local service providers, such as tour operators or guides.

Only a small number of vineyards provide on-site catering or accommodation facilities. According to an interactive search engine for “vineyards, wineries, and places with good wine in Poland,” only 69 wineries offer accommodation either on-site or nearby (www.otovino.pl). These accommodations often consist of small guesthouses or cottages rather than facilities designed for group tourism. Some vineyards assist visitors in finding lodging nearby, while others, particularly after the COVID-19 pandemic, permit enotourists to pitch tents or park campers within the vineyard grounds. Food services are even less common; only 18 vineyards declare offering such services (www.otovino.pl).

Due to the dispersed location of vineyards across the country, wine-themed tourist routes could have been established. According to an internet portal (www.enoport.pl), 11 enotourism routes were available in Poland in 2024, an increase from 9 in 2022. These routes connect several to dozens of vineyards and offer diverse experiences for enotourists. Some routes also promote other regional products, such as honey or beer.

The involvement of Polish tour operators in creating domestic wine tourism packages remains a niche activity. While finding a Polish tour operator offering enotourism products abroad is relatively easy, only three operators currently provide such services within Poland. These offerings are sporadic, often available upon request rather than as regular packages (Sidorkiewicz, 2023).

Wine-related events constitute an essential component of the Polish enotourism offer. These events vary in scale, importance, and character. Unfortunately, no reliable data source exists to determine the exact number of such events held annually in Poland. However, based on observations of enotourism activities through social media, the number

of wine-related events appears to be increasing yearly. Some of these events are grassroots initiatives organized by winemakers, while larger initiatives are supported by wine associations and local or regional authorities. The most prominent and widely recognized wine tourism event in Poland is the “Wino-branie” (Wine Harvest) festival in the city of Zielona Góra (former Grünberg until 1945). Following the tradition of wine fests taking place in German Grünberg since 1842, it is the oldest and largest wine festival in Poland, lasting nine days and taking place annually in early September. The festival features numerous activities organized by local associations, concerts, a trade fair, and presentations of regional products. The area around the town hall transforms into a “wine town,” where visitors can meet local winemakers and sample the best wines from the Zielona Góra region (Kapczyński 2021).

Summarizing the main components of the Polish enotourism offer, it appears that it is dynamic, evolving significantly from year to year. At the same time, it remains as yet underdeveloped, particularly in terms of higher-standard accommodation options and a consistent catering offer.

Opportunities and barriers to the development of the tourist function of Polish vineyards

During the survey part of the study, the openness of vineyards to visitors was initially examined. Among all respondents participating in the study, nearly all (95%) indicated that there is, or will be in the future, an opportunity for tourists to visit their vineyards (Fig. 2). Specifically, 83% of respondents declared that such opportunities were already available at the time of the survey, while 12% stated that this possibility would soon become available. Only 5% of respondents expressed no interest in offering this type of service.

Winemakers who open their vineyards to tourists (83% of respondents), were further asked about the services they provide as part of their wine tourism offerings (Tab. 1).

The three most frequently offered services include wine tasting and sales (58 mentions), vineyard tours accompanied by a winemaker (57 mentions), and guided tours of the winery and associated buildings led by a winemaker (44 mentions). In approximately half of cases a self-guided visit of the vineyard (area of grape growing) is possible (33 mentions). Additionally, one-third of wineries with a tourist function provide accommodation for tourists, as well as run workshops, training sessions, lectures, presentations, and shows (20 mentions). Only a small number of enterprises offer self-guided tours of the winery

Table 1. Wine tourism services offered by the wineries

Types of enotourism services	Number of mentions
Wine tasting and purchase opportunity	58
Tour of the vineyard accompanied by the winemaker	57
Guided tour of the winery and other facilities by the winemaker	44
Participation in the wine harvest	35
Catering offer during wine tasting	34
Self-guided tours of the vineyard	33
Festivals, wine festivals	26
Integration events for companies	23
Accommodation for tourists	20
Workshops, training courses	20
Lectures, commented talks, shows	20
Sightseeing tours	16
Cultural/artistic events	15
Special events (weddings, communions)	14
Gastronomic offerings independent of wine tasting	7
Sports/recreational events	6
Self-guided tours of the winery and other facilities	5
Spa/wellness services	3
Packages with other service providers (e.g. a winery tour combined with a visit to another local tourist attraction)	1
Other	19

Source: own research. Note that multiple choices could have been indicated.

and associated buildings (5 mentions), spa/wellness services (3 mentions), or packages combining other services, such as a winery tour paired with visits to other local tourist attractions (1 mention).

Respondents were also asked about their plans for developing enotourism activities in the future (Fig. 3). Thirteen respondents did not provide an answer, as the vineyards they represented did not yet engage in this type of activity. Among the remaining ones, more than half expressed an intention to expand

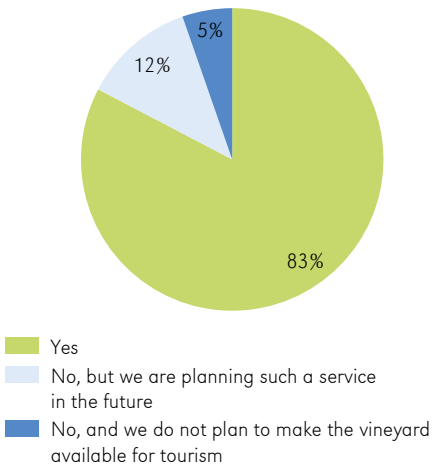


Figure 2. Declarations of respondents regarding the possibility of tourists visiting the vineyard

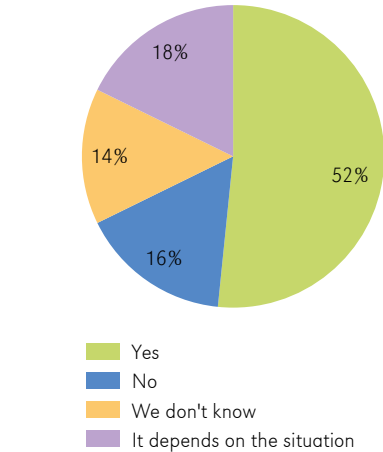


Figure 3. Declaration of respondents regarding expansion of wine tourism activities

enotourism activities, while only 10 respondents firmly denied such plans. Nearly one-third of respondents were uncertain, stating either that they had not yet decided or that their decision would depend on future circumstances.

Respondents planning to expand their enotourism activities were then asked about the specific services they would like to offer. Accommodation services were indicated most often, followed by the declaration of willingness to participate in various wine festivals and events, as well as in cultural and educational events (wine training and workshops) (Tab. 2).

Table 2. Intended tourist services in Polish vineyards in the future

Types of enotourism services in the future	Number of mentions
Accommodation for tourists	26
Wine festivals and events	19
Cultural/artistic events	17
Workshops, training courses	17
Catering offer during the wine tasting	15
Wine tasting and buying wine	15
Guided tours of the winery and other facilities	14
Integration events for companies	13
A gastronomic offer independent of wine tasting	12
A tour of the vineyard in the company of a winemaker	11
Lectures, presentations, shows	10
Packages with other service providers	9
Participation in the wine harvest	9
Celebrations (weddings, First Communion)	7
Spa/wellness services	7
Don't know	6
Sightseeing in the area	6
Self-guided vineyard tour	4
Sports/recreational events	4
Other	3

Note that multiple choices could have been indicated.

Respondents were further questioned regarding the perceived benefits of engaging in enotourism activities (Tab. 3). This question was answered by 71 out of 75 respondents. The most frequently cited benefits were an increase in wine sales (58 mentions), brand promotion (57 mentions), and additional sources of income, as well as the strengthening of social relations, including contacts, relationships, cooperation, and image (48 mentions each). The least frequently mentioned benefit was financial security in the event of unforeseen circumstances through business diversification (only one mention). Additionally, two respondents reported difficulty in identifying any benefits associated with conducting enotourism activities.

Table 3. Benefits of wine tourism according to respondents

Benefits to respondents	Number of mentions
Increase of wine sales	58
Brand promotion	53
Additional sources of income	48
Strengthening the winemaker's social relations (contacts, relationships, cooperation, image)	48
Opportunity for personal professional development and/or to fulfil passions	27
Possibility of creating additional jobs	16
Difficult to assess	2
Financial security in case of unforeseen events through business diversification	1
Other	5

Source: own research. Note that multiple choices could have been indicated.

The question regarding the benefits of enotourism activities was complemented by an open-ended question addressing reasons for undertaking/planning wine tourism activities. This question was answered by 60 out of 75 respondents. The most common reasons include economic issues, understood as the opportunity for additional wine sales; social issues, understood as the opportunity

to develop interpersonal contacts; and promotional issues, understood as the ability to promote one’s vineyard, wine, and the broader concept of Polish winemaking (Tab. 4). These results align with the highest number of mentions in the question regarding the benefits of wine tourism activities.

Table 4. Reasons for undertaking/planning wine tourism activities

Major issues	Specific targets	Number of mentions
Economic issues	Wine sales	16
	Additional income, e.g. from paid tastings	7
Promotional issues	Own vineyard, Polish winemaking in general	13
Social issues	Social relations	15
	Developing passion, hobby	7
	Feedback from customers, e.g. on wine quality	2
Development issues	Diversification and expansion of activities	8
Other		4

Another aspect addressed in the survey was the identification of barriers to continuing or expanding tourism activities (Tab. 5). Respondents indicated a variety of barriers, with four key obstacles emerging. The two main challenges, identified by approximately 50% or more of respondents, are the high cost of investment and a lack of time. Additionally, a lack of personal strength, energy, and health, as well as a shortage of suitable staff, were noted as significant barriers by a considerable number of respondents.

Stakeholders who support the development of wine tourism are often local and regional wine associations, of which there are 18 in Poland at the moment (*Winogrodniczy.pl*, 2024). Respondents were therefore asked to evaluate this type of support in the context of wine tourism development (Fig. 4). Four respondents did not answer this question and five were not members of organisations

of this type. The remaining responses showed that the majority, 63%, assesses the support of the local wine association in the development of wine tourism either strongly or rather positively. Only 8% of winemakers have an opposite view (strongly or rather negatively), and 17% have no opinion on the subject.

Table 5. Barriers to run/expand tourism business according to respondents

Barriers to run/expand tourism business	Number of mentions
High investment costs	44
Lack of time	35
Lack of personal strength/energy/health	19
Lack of appropriate personnel	16
Conflict between wine production and/or vineyard work and tourist function	9
I do not see any barriers to run/expand tourism activities	7
Lack of demand for such services	2
Don't know	1
Other	1

Note that multiple choices could have been indicated.

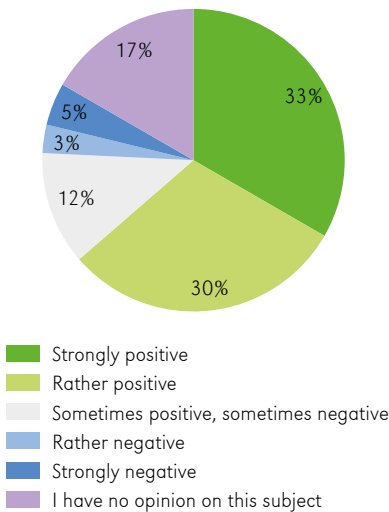


Figure 4. Evaluation of support from local and regional winegrowers’ associations in the context of wine tourism development in the opinion of respondents

The final question aimed to gather examples of good and effective practices implemented by winegrowers' associations, both from Poland and abroad, in supporting enotourism. Despite being open-ended, the question elicited responses from as many as 33 participants. The key practices highlighted by winemakers focused on the following aspects of wine tourism development:

- Creation of local and regional wine routes,
- Organisation of wine events,
- Organisation of wine competitions,
- Promotion of wine drinking culture,
- Promotion of winemaking, vineyards and enotourism,
- Organisation of sectoral training courses for winemakers,
- Integration of wine industry,
- Organisation of study tours for educational purposes.

Discussion – what future for wine tourism?

The results of the survey indicate that Polish winemakers who took part in the survey are interested in developing the tourism function of their vineyards. Only 5% of respondents did not show interest in hosting tourists. This may be interpreted that enotourism in Poland holds significant potential and has a solid foundation for further growth. According to the report prepared by Szolnoki et al. (2023), about 78% of wineries in wine countries make their vineyards available to tourists to some extent. At the same time, this rate varies greatly from country to country. In regions where viticulture is still in its early stages, this share is even higher, reaching approximately 84%. Thus, our results converge with this global report and show that the Polish winemakers apparently see various benefits of enotourism development.

Regarding the scope of enotourism services provided by the surveyed vineyards, the most frequently offered services include wine tasting and purchasing, vineyard tours accompanied by the winemaker, and guided visits to wineries and related facilities. These

services appear to constitute the fundamental offerings commonly associated with vineyard visits. Services such as accommodation and permanent gastronomic offerings are rarely provided due to the current lack of infrastructure. Enotourists in Poland are therefore by necessity predominantly day-trippers, which further underscores the view that, according to Butler's (1980) model and the Tourism Area Life Cycle (TALC) analysis, enotourism in Poland remains in its introductory phase of development. This phase, as characterized by Butler's model, includes a predominance of day tourists, underdeveloped tourism infrastructure, intensive marketing activities, and a low level of benefits relative to the high costs associated with tourism development, particularly in terms of infrastructure.

Winemakers clearly recognize that further development of the tourism function of their vineyards will be impossible without adequate infrastructure, and this is an issue they aim to address as a priority. However, the cost of such investments poses a significant barrier and was indicated as such in most cases. Here the effects of scale may play an important part.

Most vineyards in Poland are very small, often run as family businesses, with an average size of approximately 1.5 ha. For these vineyards, viticulture and wine production are their primary activities, while tourism functions serve as supplementary and complementary pursuits.

Currently, Polish winemakers are expanding their tourism offerings in a manner that does not require substantial financial investment but nevertheless remains innovative and aligned with contemporary tourism trends. They place great emphasis on the experience and emotions that well-developed wine tourism can provide (Marlowe & Bauman, 2019; Terziyska, 2024). In addition to vineyard tours and wine tastings, winemakers organize various events, such as classical and jazz concerts, theatrical performances, and meetings with artists or travellers. Through these initiatives, they contribute, as suggested by the model proposed by Marlowe and Bauman (2019),

to the development of cultural, educational, recreational, and leisure functions of vineyards, apparently aimed at more conscious and wealthier tourists. The analysis of wine-related websites, social media platforms, interviews with winemakers, and participant observations conducted by the authors of the article, shows that the educational dimension of wine tourism extends beyond viticulture and winemaking to encompass the exploration of local history, culture, and traditions. Visits to vineyards often include opportunities to appreciate the local landscape and experience harmonious, aesthetically pleasing environments. This aligns with the contemporary trends emphasizing the need for leisure close to nature, the search for authenticity, and tourist experience consistent with the concepts of slow tourism and experiential tourism.

The organization of various events and activities by winemakers not only attracts new tourists but also encourages repeated visits (Maciejewska et al., 2024). These efforts undoubtedly contribute to building relationships and enhancing the image of the vineyard, which, as revealed by the results of this survey, is of particular importance to winemakers.

The tourism offer of Polish vineyards extends beyond basic functions, and aims to provide visitors with meaningful experiences and emotional engagement. Accordingly, it also aligns with the concept of the experience economy proposed by Pine and Gilmore (1998), particularly reflecting the four key dimensions outlined in the 4E model: education, aesthetics, entertainment, and escapism.

The educational dimension encompasses not only knowledge about wine itself but also insights into the cultural and geographical context of the vineyard's location. The aesthetic aspect is manifested in the visual appeal of the vineyard landscape, highlighted during guided tours which include panoramic viewpoints, and the preservation of traditional architectural forms. Entertainment is delivered through concerts, festivals, workshops, and social events, thereby

fostering a lively and engaging atmosphere. Finally, the escapist component is associated with the authenticity of experiences offered – such as the opportunity to participate in grape harvesting or winemaking – which promotes a sense of immersion and a temporary detachment from everyday life (Carvalho et al., 2021; Kastenholtz et al., 2022).

Field observations and findings emerging from the survey indicate that many winemakers are aware of the significance of cultural, historical, and natural heritage of the regions in which their vineyards are located. They incorporate these elements into the narratives during vineyard tours, promote regional dishes and traditions, and often reflect local heritage in the labels and names of their wines. When establishing wineries, they frequently adapt traditional buildings or design new infrastructure in a style that accords with the traditions and characteristics of their respective regions (Pijet-Migoń & Królikowska, 2020; Kapczyński, 2021). These practices align with broader trends observed both in the so-called Old and New Wine Worlds. Simultaneously, they represent an additional aspect of wine tourism that can contribute to sustainable development. Thus, in similar to other regions where sustainable wine tourism is being developed (Karagiannis & Metaxas, 2020; Trigo & Silva, 2022; Rodriguez & Quintela, 2024), Poland is witnessing the growth of enotourism based on three key elements: vineyards (with their landscape and aesthetic aspects), wineries, and the broader cultural and natural heritage.

A very important part of the survey was focused on barriers to running/expanding tourism activities in Polish vineyards. The biggest barrier, according to those surveyed, is the high cost of investment that goes into preparing a vineyard to serve tourists. While in the high tourist season, when the weather is favourable, tourists can be accommodated under a shelter, the cost of which is relatively low, in the situation of unfavourable conditions, a better alternative is a tasting room, which is already a kind of real estate, connected with much higher running costs.

Furthermore, referring to the possibility of extending enotourism activities to include accommodation services, the cost of such an investment is even higher. In the second place in the hierarchy of barriers was the lack of time. This result is rather unsurprising and largely related to the specificity of the stage of wine tourism development in Poland, which is still in a start-up phase. In this context, it should also be emphasised that in this phase, due to the winemakers' strong focus on producing a quality beverage, reconciling winemaking and tourism activities is challenging. Moreover, the vast majority of Polish vineyards are additional activities for their owners, meaning that they combine their professional work with their duties at the vineyard. In Poland, this phase in the development of enotourism is also a time to make an informed, but difficult decision as to whether the venture appears profitable and can be a major source of income. Furthermore, among the relatively many obstacles indicated is the lack of suitable personnel, which is an issue that currently affects not only the wine industry. It is likely that due to the location of vineyards, i.e. mainly in rural areas with lower human capital, the possibility of finding people with the right competences is even more difficult than in cities. Thus, this barrier likely connects with another one, namely the lack of personal strength, energy and health, as in such a situation vineyard owners have to perform all the tasks related to running the vineyard themselves.

Summarising the background information available at the beginning of this research, the results of the survey, and the discussion, in line with the research objective of this article, Figure 5 presents the main opportunities and barriers for wine tourism development in Poland. The key issue now is to reflect which ones are going to exert stronger impact, favouring further growth or conversely, leading to stagnation or even decline. It seems that external conditions such as ongoing climate change, changing patterns of alcohol consumption, observed trends in domestic tourism and, in some

regions, an increasing recognition of wine-making as a regional brand should facilitate the development. An increasing experience among winemakers themselves, more and more accustomed with running two businesses simultaneously (wine production and tourism) should result in the optimization of efforts and activities. At the same time, responses received from regions of Poland not readily associated with wine production (central, north, and north-east) also indicate an intention to invest in wine tourism. This, if implemented, would create a regionally unique tourist product, with the respective vineyards being unusual and hence, attractive components of the regional tourist product. The effects of financial barriers and human factor (both regarding the owners and the personnel) are difficult to predict, being largely personal matters. It is perhaps this sphere which should be carefully observed by various stakeholders aimed at supporting winemaking and wine tourism, to react to any alarming trends which might appear, including an abandonment of vineyards in most extreme cases.

Numerous similarities can be observed between the development of wine tourism in Poland and that in other emerging wine regions, particularly the United Kingdom. Winemakers increasingly recognize the considerable potential of tourism for brand promotion and the cultivation of customer relationships. In addition to the core offering – vineyard tours and wine tastings – a diverse range of recreational and cultural activities is now available.

However, in the case of wine tourism in the UK, accommodation and gastronomic services tend to be more developed. This disparity may be attributed to several factors, including the size of vineyards – while the average vineyard in the UK exceeds 4 ha, the largest one covers more than 120 ha – as well as the earlier emergence of viticulture in the country, which began in the 1990s. By contrast, the dynamic growth of Polish viticulture commenced only in the second decade of the 21st century.

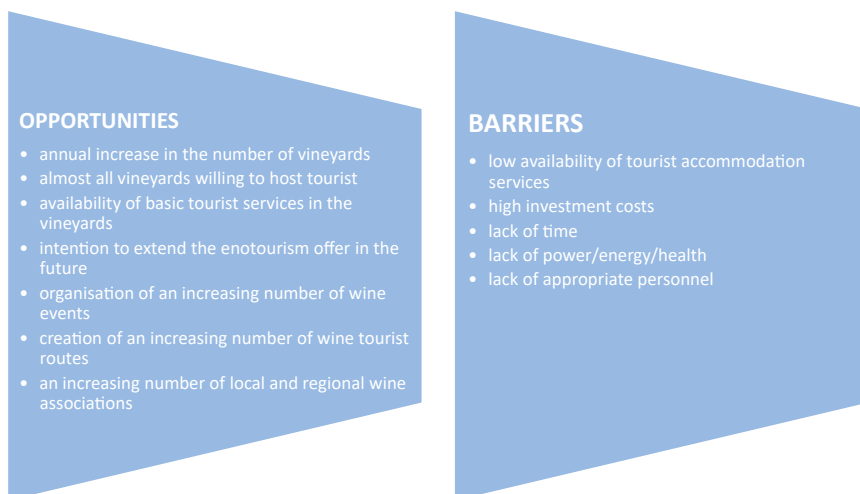


Figure 5. Main opportunities and barriers for wine tourism development in Poland

Limitations and additional statistical analyses

In accordance with the conditions of entire anonymity of the respondents, no socio-demographic data – such as age, education level, vineyard size, income level, or precise location details except the voivodeship – were collected, as such information could potentially allow for the identification of individual vineyards. Following the experience from various other surveys, it was reasonable to assume that many vineyard owners would not take part in the survey if expected to provide such sensitive information.

Consequently, substantial limitations arose in attempting to identify meaningful relationships or differences among subgroups within the sample. Moreover, the relatively small sample size ($n = 75$), combined with the non-random sampling approach and regional imbalance in responses (which was beyond the control of the authors), further restricted the possibilities of conducting sophisticated inferential analyses.

Despite these constraints, additional exploratory statistical analyses were conducted, focusing primarily on regional (voivodeship)

differences in several key areas of vineyard tourism, including:

1. The willingness of vineyards to receive tourists.
2. Types of wine tourism services currently offered.
3. Main barriers identified by winemakers to expanding tourism activities (such as lack of time, high investment costs, lack of appropriate personnel, lack of personal energy/health).

These analyses included Chi-square tests, Fisher's Exact Test (comparing selected regions), and the G-test of independence, aiming to capture any potential variations between regions in Poland. However, all these statistical tests consistently yielded non-significant results (Chi-square p-values ranged from 0.54 to 0.98; Fisher's Exact Test p-value = 1.0; G-test p-value = 0.89), indicating no statistically meaningful differences across the regions investigated. Given these findings, no firm conclusions about regional variations can be drawn from the available data. Instead, the results suggest a relatively uniform landscape of opportunities and challenges faced by winemakers throughout Poland, reinforcing the conclusion that identified benefits and barriers are likely widespread rather than localized phenomena.

Conclusions

In recent years, viticulture in Poland has undergone dynamic development, accompanied by the growth of wine tourism. Although Polish viticulture remains in its early stages and most vineyards operate as micro-enterprises, it has already become common to integrate agricultural activities (grape cultivation) and processing (wine production) with tourism services. This study, aimed to better understand the phenomenon of wine tourism from the supply side, provides an answer why the wine-focused tourist product is expanding. Winemakers' activities reflect their recognition of potentially significant benefits provided by enotourism. According to the winemakers themselves, wine tourism enhances wine sales, promotes brand recognition, provides supplementary income, and fosters the establishment and strengthening of social relationships.

Numerous opportunities exist to further develop the tourism function of Polish vineyards. Growth can be supported by the willingness of nearly all vineyard owners to host tourists, the availability of at least basic tourist services at vineyards, plans to expand enotourism offerings, organization of more frequent wine-related events, as well as the creation of additional wine tourism routes and the establishment of local and regional wine associations. In addition, if the current trend continues, we may expect more vineyards to enter the market, enhancing the potential of wine tourism to develop.

However, several barriers may impede the development of enotourism in Polish vineyards. A key challenge is the limited availability of accommodation services offered by vineyard owners. One potential solution involves fostering partnerships between winemakers and local accommodation providers (e.g., hotels, guesthouses, and agrotourism facilities). Such collaborations could not only mitigate this challenge but also positively influence the engagement of local communities surrounding vineyards. These initiatives can help overcome resource constraints and expand service

offerings without requiring significant capital investment – another notable barrier highlighted by the surveyed winemakers.

Enotourism in Poland shows considerable potential for growth and can significantly contribute to the sustainable development of rural areas. The expansion of wine tourism diversifies rural economies beyond agriculture. Collaboration between winemakers and other service providers (e.g., accommodation, catering) as well as producers of regional goods can stimulate the growth of other regional enterprises. Furthermore, vineyards, with their aesthetic and landscape value, can increase the appeal of less popular locations and regions among tourists, thereby facilitating the deglomeration of tourist traffic.

Given the dynamic development of the wine-making sector and the concurrent growth of wine tourism in Poland, ongoing monitoring of these socioeconomic phenomena should be regarded as essential. It will also help to validate predictions formulated in this paper. Future research may also consider regional disparities in the development of wine tourism, the factors influencing its expansion, and trends in wine tourism offerings, particularly in the context of sustainable regional development. Additionally, comparative studies of wine tourism in Poland and in other countries with similar climatic conditions, where wine tourism is also relatively new but undergoing significant growth, would be of considerable value.

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Editors' note:

Unless otherwise stated, the sources of tables and figures are the authors', on the basis of their own research.

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