



# To better understand Tourism in Lavaux

Summary of the project “Tourisme en Lavaux” (2017-2019)

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## The context

In 2015, the Lavaux World Heritage Association (LPm) launched a vast monitoring programme for the World Heritage site in order to meet a UNESCO requirement. This work was entrusted to the University of Lausanne (UNIL), within the framework of an agreement signed between LPm and UNIL. A first step was to set up a platform for collecting, exchanging and communicating information on the territory of Lavaux (<http://lavaux.unil.ch/>) and to collect and manage various data on Lavaux. This work resulted in the publication, in December 2016, of two reports on the territorial diagnosis of Lavaux and on the evolution of the site between 2000 and 2015. During this phase of the research, we found that several domains were poorly documented and needed further investigation. This is how the project "Tourism in Lavaux" (2017-2019) was launched, which this paper reports on.

## Objectives

The territorial diagnosis carried out in 2016 highlighted several statistical gaps. Accommodation statistics were mainly based on hotel nights and were available at the Montreux-Riviera destination level. It was therefore difficult to identify the contours of the tourist accommodation specific to Lavaux, taking into account the para-hotel sector. In addition, no overview of the tourism offer was available and knowledge of tourists' expectations, practices and travel was very incomplete. The perception of tourism by service providers, particularly winegrowers, was not really known. Finally, we wanted to obtain an overview of the governance of tourism in Lavaux, as well as of wine tourism activity. It is to these different questions that the project "Tourism in Lavaux" tries to answer.

## A multi-method approach

To do this, we have combined several methods:

- A report on the original tourist offer (what attracts tourists to Lavaux) and derived tourist offer (the infrastructure and tourist services available) was drawn up, on the basis of the available tourist documentation. 28 interviews were conducted with tourism service providers (hotel managers, guides, signposting managers, etc.), public authorities and cantonal administration officials, as well as winegrowers. The main purpose of these interviews was to understand the perception of tourism phenomena by those responsible, in one way or another, for the tourism offer.
- A vast questionnaire survey was carried out during summer and autumn 2018 and 670 visitors of Lavaux were interviewed in various places typical of the region. The objective here was to identify the characteristics of tourists (origin, socio-professional profile, age), their practices (what activities? what visits? what travel? what expenses?), their expectations and the degree of satisfaction.
- A mapping of the visibility zones was carried out; the aim was to highlight which sectors of Lavaux are most visible from many places and which are on the contrary more "hidden". An analysis of photo deposits on the Flickr platform aimed, thanks to the GPS coordinates attached to the photos, to identify the most popular panoramas. An automatic analysis of the content of a sample of these photos made it possible to understand what is photographed first.

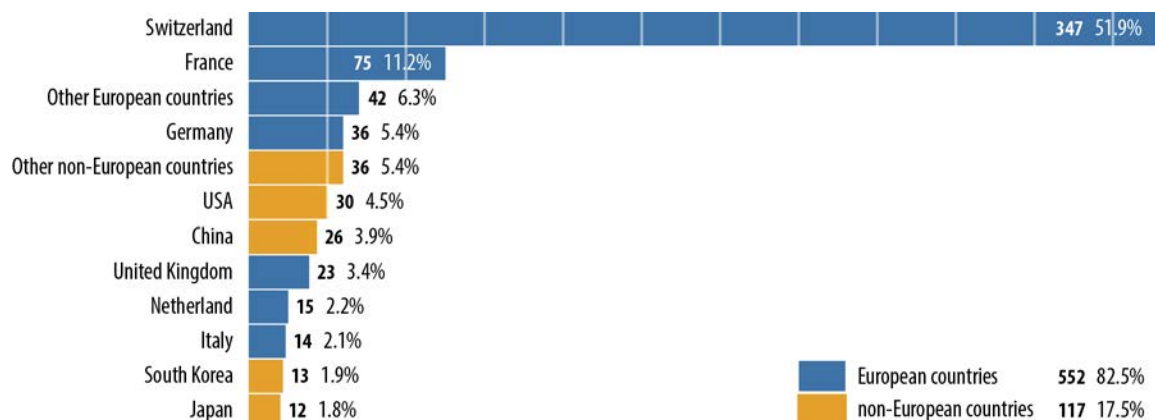
- A GPS tracking of the movements of a series of volunteer visitors was also carried out in October and November 2018.
- Finally, a monitoring of movements within the vineyard was carried out. Movement frequency measurements, using automatic and thermal counters and cameras (the same ones that allow wildlife counts) were carried out at 31 sites between April and December 2018. The aim was to better understand the movements on the Lavaux pedestrian network and the geographical distribution of visitors.

The results of these different methods were compared and combined during a working day on 30 November 2018 in the presence of Jeanne Corthay and Emmanuel Estoppey (LPm), who were able to shed light "from the field" on the interpretation of certain results.

## Nine main conclusions

### Mostly Swiss tourists on a daily basis

Half of Lavaux's visitors come from Switzerland (52%), followed by France (11%) and Germany (5%). Non-European visitors come mainly from the United States and China (4%). Half of the visitors do not stay on site. For two thirds of the people staying on site, the stay is less than three nights, for an average of 1.7 nights per stay. The age profile shows a predominance of people under 30 and over 50 years of age, who visit Lavaux as a couple or with friends. There are few families with children. 40% of the respondents visited Lavaux for the first time. Lavaux is therefore essentially a destination for short stays, mainly on a daily basis, as a couple or in groups of friends, appreciated especially by the Swiss.



*Provenience of visitors in Lavaux.*

### Landscape is omnipresent

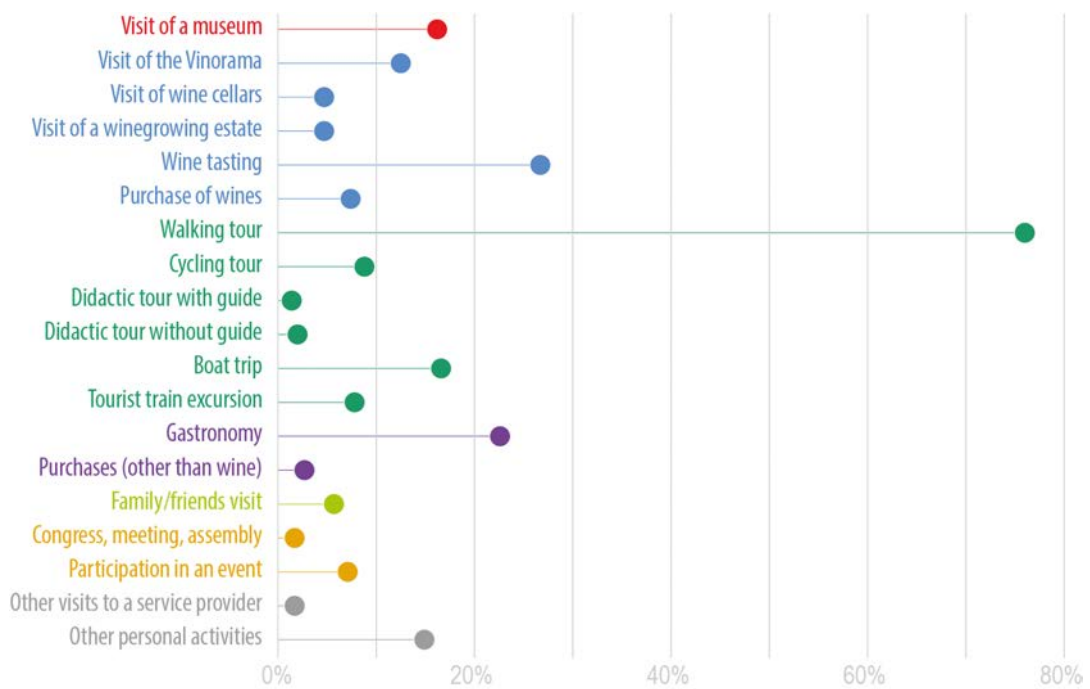
The landscape is at the heart of the original offer. This is the main characteristic of Lavaux that is highlighted in tourist advertising, before wine. As for visitors, they come first and foremost to Lavaux to enjoy the landscape. There is therefore a match between supply and demand. This omnipresence of the landscape explains why the main activity of the interviewees is hiking, well before wine tourism visits and wine tastings or purchases. It seems that it is the vineyard/lake/mountain trypsic that makes Lavaux more attractive than the wine landscape itself. This observation is corroborated by the fact that Lavaux's internal visibility is often quite low; when you are in Lavaux, you have few points of view that allow you to see the whole vineyard at a glance. Few interviewees indicate that it was the UNESCO classification that motivated their visit: people come to Lavaux for the landscape, but not because it is inscribed on the World Heritage List.



The landscape, in particular the vineyard/lake/mountain tryptic, is the pillar of the tourist attractiveness of Lavaux (photo : E. Reynard).

### The prevalence of hiking

This result is certainly partly biased by methodological choices: counts and surveys along the roads. Despite that, it seems that visitors prefer activities that are not charged for, especially hiking in the vineyard.



Activities practiced by the visitors.

## Wine and tourism, an ambiguous relationship

Despite efforts to develop wine tourism, wine tourism activities (cellar visits, tastings, thematic excursions on vines and wine) are not yet at the heart of tourism in Lavaux. The majority of winegrowers interviewed consider that the economic contribution of tourism is relatively low, particularly in terms of wine purchase, and that the disturbances (waste in the vineyards, movement disruption, deterioration on the property) are quite high. Nevertheless, some winegrowers have developed a niche wine tourism activity that is interesting from an economic point of view. As for the *Caves ouvertes vaudoises* (Vaud Open Cellars), which is a flagship wine tourism activity in the canton, Lavaux is undeniably the most popular destination for participants.

## Relatively low economic impact

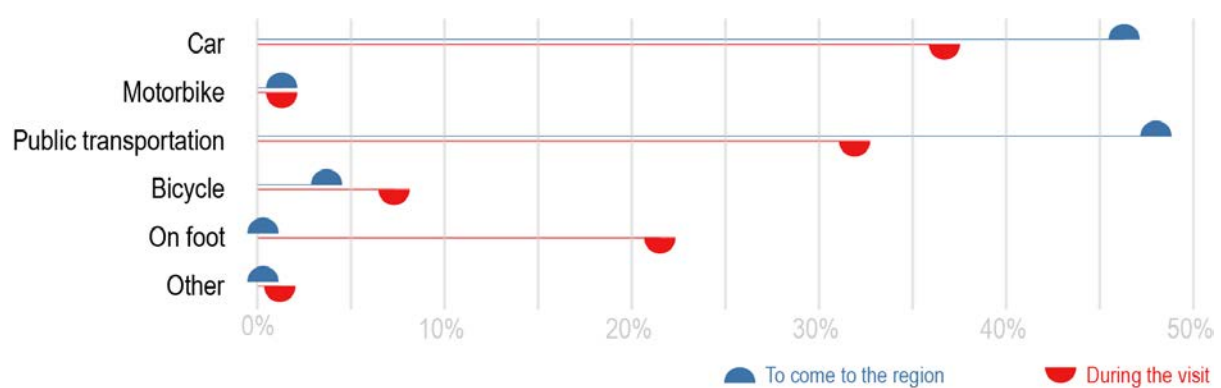
One out of six visitors buys wine, often in small quantities, and sometimes other local products. For those who sleep on site or in the region, accommodation represents the largest part of the budget (between 100 and 500 Swiss francs), followed by catering costs. 40% of visitors use a paid activity, generally under 100 Swiss francs. One in six people do not spend anything on site. Nevertheless, as the derived offer (accommodation, catering) is rather limited on site, most tourist service providers benefit from the visits, which is less true for the wine sector as a whole.

## Satisfied visitors

The survey showed that the visitors interviewed are satisfied, if not very satisfied, with their stay in Lavaux. In particular, the landscape is highly appreciated, as is the availability of public transport. The only downside is the price level, especially for foreign visitors.

## Diversified mobility

Half of the visitors interviewed came by public transport and the other half by car. Once there, 1/5 of visitors walk, 7% cycle. One third use public transport and another third use the car. The presence of a double railway line at the top and bottom of the vineyard is an asset for Lavaux, which favours vertical visits of the vineyard to the east (Chexbres-Rivaz-St-Saphorin) and west (Grandvaux-Cully) of the Dézaley. As for "horizontal" tourist trips, in the vineyard or along the lake, they are organized in two relatively "impermeable" zones on either side of the Dézaley promontory.



Means of transport used to come to Lavaux and for the on-site visit.

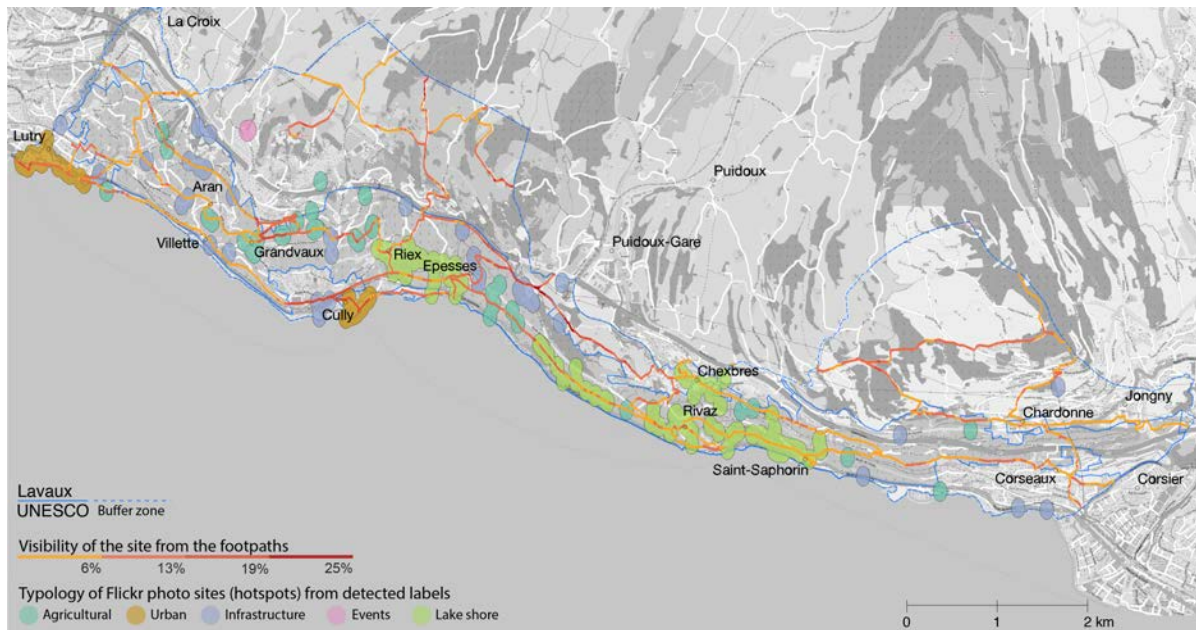
## Spatial and temporal variability

Not all of Lavaux is a tourist destination. There are hotspots and tourist shaded areas. The eastern part of the site (Chardonne) is rarely visited. Other places, especially to the west of the vineyard (Grandvaux, Lutry, Cully) are particularly visited and constitute panoramas from which to photograph the landscape of Lavaux. The central areas are particularly appreciated by walkers during the



weekend with about 3 times more visitors walking in the vineyards, and with more than 1000 walkers on a peak weekend day. Periods between 10 a.m. and 4 p.m. are the most popular.

Visits to Lavaux are not carried out with the same intensity throughout the year. While it is clear that winter is the off-season, the survey showed that the middle of summer (July and August) – which corresponds to school holidays and a particularly hot and unsuitable time to visit the vineyard, which lacks shade – is less popular than spring and autumn. The autumn's interest in visits is accentuated by the magic of autumn colours; the high tourist autumn season corresponds to the high wine-growing season (grape harvest), which can exacerbate the latent rivalry between the two activities.



*Visibility of the World Heritage site from hiking trails and typology of Flickr photo sites.*

### **Complex tourism governance**

Tourism governance raises two questions. Who is in charge of promoting Lavaux as a tourist destination? Not all the actors interviewed have the same vision on this subject and it would be necessary to clarify this question in the future in order to better distribute roles. In addition, several inconsistencies were noted, such as invalid public transport passes valid throughout Lavaux in 2018 or different tourist taxes depending on the location. Some harmonization should be considered.

### **And for the future?**

The full results of the study are available at <http://lavaux.unil.ch/>. A scientific symposium is held in Cully from 9 to 11 October 2019, including a public evening on 9 October. The day of October 10 is devoted to a scientific symposium on tourism in open landscapes and wine-growing regions, with case presentations from other regions. The day of 11 October is addressed to tourism professionals and should allow them elaborate strategies on the future of tourism in Lavaux.

The results of this study and the workshop will be used to stimulate reflection with a mind to prepare a new version of the Lavaux management plan in the course of 2020.

The "Tourism in Lavaux" project was carried out from May 2017 to April 2019 by the Institute of Geography and Sustainability of the University of Lausanne, in collaboration with the Lavaux World Heritage Association (LPm) and the Tourist Office of the Canton of Vaud (OTV). We thank all those who contributed to this study, in particular:

- Tabea Wäfler (UNIL student) and Patrick Bürgin (LPm project manager) who collaborated in the questionnaire surveys and travel monitoring;
- Jeanne Corthay, Aurélie Moullet and Emmanuel Estoppey (LPm) for the follow-up of the project and relations with the municipalities;
- Florence Wagnier (OTV) for the coordination with the Tourism Observatory project of the canton of Vaud;
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- And all the people who gave us some of their time to answer our questions.

Thank you !!!