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French Adults Value Wine Heritage at €12 Billion, Deloitte Study Finds

A survey commissioned by a wine industry group found that 86% say wine belongs to French cultural identity.

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French adults say they would collectively devote €6.8 billion to strengthen the country’s wine heritage and €5.2 billion to preserve it, according to a Deloitte study commissioned by wine industry group Vin & Société, a result the group is presenting as

evidence that wine is valued in France well beyond drinking habits or its economic weight.

The study, released by Vin & Société, tries to measure what economists call the “non-use value” of wine heritage, meaning the value people attach to its existence, transmission and cultural meaning independently of whether they consume wine. Deloitte said respondents were willing, on average, to contribute €123 per person to reinforce that heritage and €94 per person to preserve it.

The research comes as the French wine sector continues to emphasize its cultural role alongside its economic importance. Vin & Société said the industry generates €92 billion in revenue, supports 440,000 direct and indirect jobs and attracts nearly 12 million wine tourists a year. The new study was designed to estimate something different: how much value the public assigns to wine as part of French identity, shared customs and know-how.

Deloitte broke that heritage into three dimensions: knowledge and skills linked to wine, conviviality and social ties associated with shared moments, and cultural inheritance and international influence, which includes wine’s place in French identity, its transmission between generations and its role in the image of France abroad.

When asked which aspect matters most, 70% of respondents put conviviality and social ties first, ahead of cultural inheritance and influence at 53% and wine-related knowledge at 27%. But when they had to make trade-offs involving a financial contribution, the ranking changed. Cultural inheritance and influence received the highest monetary value, with respondents willing to allocate €38 per person for preservation and €62 for reinforcement. Conviviality and social ties were valued at €33 for preservation and €18 for reinforcement, while knowledge and intellectual enrichment were valued at €23 for preservation and €42 for reinforcement.

The study found broad support across demographic groups. Deloitte said age, gender and socioeconomic category did not significantly change the value attached to wine heritage. Geography had some effect, but not enough to overturn the broader pattern. People living in wine-growing regions said they would devote €111 on average to preserving this heritage, compared with €82 among residents of other regions.

The findings also suggest that attachment to wine heritage extends beyond people who drink it. According to the study, 75% of non-consumers value at least one dimension of wine heritage, and 47% of non-consumers said they feel proud when a French wine is recognized abroad. Overall, 86% of respondents said wine belongs to French cultural identity.

Deloitte and Vin & Société also compared the French results with international studies on other cultural and natural landmarks. They said the average willingness to pay measured in this study is higher than figures reported for the Colosseum in Italy, estimated at €60 per person, the Great Barrier Reef in Australia at €55, and Colombia's coffee cultural landscapes at €38. Maia David, a professor of environmental economics at AgroParisTech who supported the study, said the French result stands above the €57 average identified in academic literature on comparable heritage valuations.

The study notes, however, that those international comparisons are only indicative because the nature of the heritage being assessed, the contribution requested and the population surveyed differ from one study to another. The French survey itself does not measure actual spending. It measures stated willingness to contribute under hypothetical scenarios.

According to the methodology released with the study, Deloitte surveyed 2,040 adults in metropolitan France in a sample presented as representative of the national population age 18 and older. Women accounted for 52% of the sample, the average age was 50, 41% lived in wine regions and 85% said they consume wine.

Participants first watched two explanatory videos intended to create a common understanding of the concepts being evaluated. They then completed eight successive choice exercises involving hypothetical scenarios in which the three dimensions of wine heritage could be degraded, intermediate or improved. Each scenario included a possible financial contribution ranging from €0 to €40, framed as a donation to a dedicated fund. Deloitte said it then used econometric modeling to estimate the value attached to each attribute. A pilot survey of 62 respondents was conducted before the main fieldwork.

The research was carried out by Deloitte France economists Olivier Sautel, Liesbeth de Fossé and Liza Trambouze, with academic support from David and a scientific committee that included specialists in anthropology, wine history and museum and cultural programming. Vin & Société, which represents 21 regional interprofessional bodies and seven national organizations from the French wine trade and production sectors, said it commissioned the study to better document wine’s place in French society beyond sales, exports and tourism.