

Results for: SURVEY OF ENVIRONMENTAL ATTITUDES AND MANAGEMENT PRACTICES OF WINE PRODUCERS

1) What is your designation in the organisation?

(The last five responses are given)

- winemaker/director
- Winemaker
- WINEMAKER/PRODUCTION MANAGER
- Co-owner
- Winemaker

2) How long have you been employed by this organization?

1. Years:

3) Which of the following categories best represent the bottled wines you sell? If you sell wines from more than one category, please indicate the approximate percentage for each category (price points listed below are per bottle price at retail). **Total 100%**

1. Popular premium (ZAR35 and below) %:
2. Super premium (ZAR35 – ZAR55) %:
3. Ultra premium (ZAR56 - ZAR100) %:
4. Luxury (ZAR100 and above) %:

4) Which of the following categories of customers best represent the bottled wines you sell? If you sell wines from more than one category, please indicate the approximate percentage for each category. **Total 100%**

1. Private sales %:
2. Off-consumption (retail) %:
3. On-consumption (restaurants) %:
4. Distributors %:

5) How would you describe the area near the primary operations of your winery?

	Percentage	Responses
Primarily rural agriculture	63.5	47
Primarily residential	0.0	0
Mix of agriculture/residential	36.5	27
Total responses:		74

6) Is the winery owned by a family?

	Percentage	Responses
Yes	60.8%	48
No	39.2%	31
Total responses:		79

7) If it is family-owned, how many **years** has the family owned the winery?

Average: 48.40
 Range: 0 <=> 300
 Median: 12
 Total Responses: 46

8) What is the approximate number of **cases** (9 litre) sold last year?
Litres of bulk wine sold last year?

1. Cases:
2. Litres :

9) In the past year, approximately what percentage of your total sales resulted from exports?

Average: 40.23
 Range: 0<=>99
 Median: 40
 Total Responses: 71

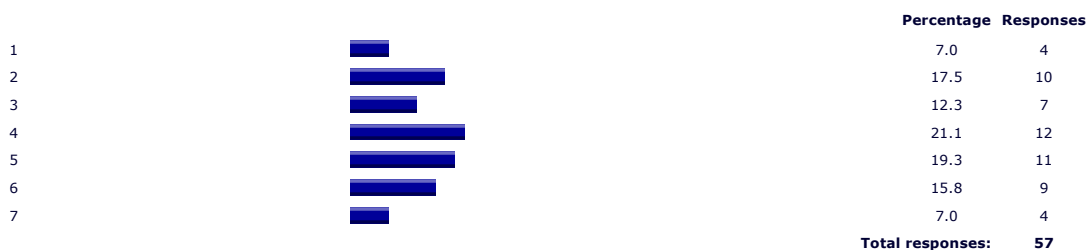
10) What is the approximate number of permanent employees at your winery?

Average: 26.64
 Range: 1<=>450
 Median: 13
 Total Responses: 72

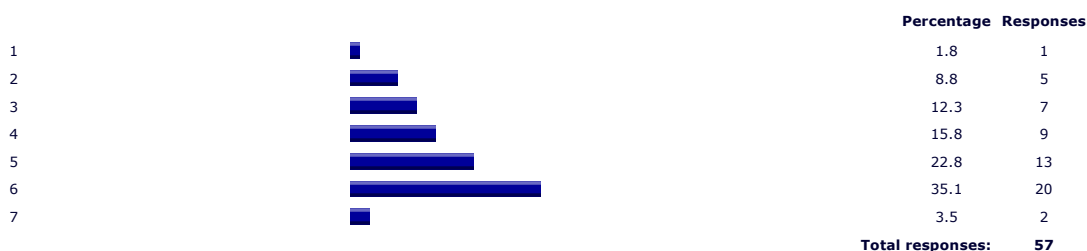
11) What year was your winery founded?

Average: 1,969.86
 Range: 1,694<=>2,005
 Median: 1,997
 Total Responses: 70

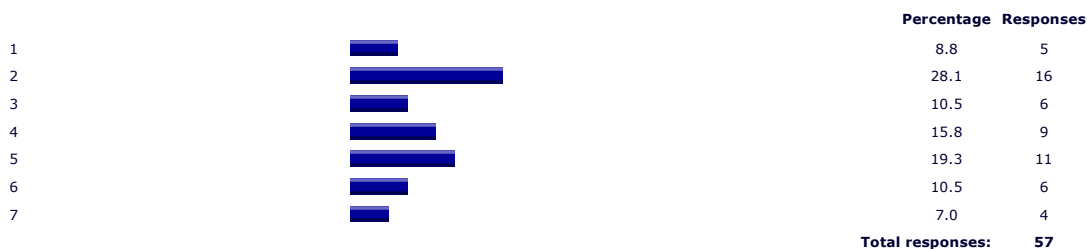
12) The environmental performance of industry leaders.



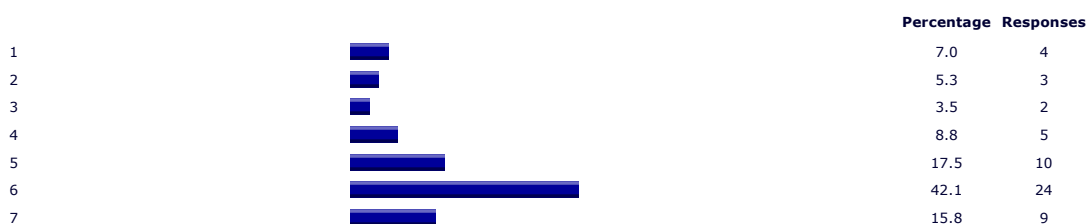
Our customers' concern for environmental quality.



Our workforce's concern for environmental quality.

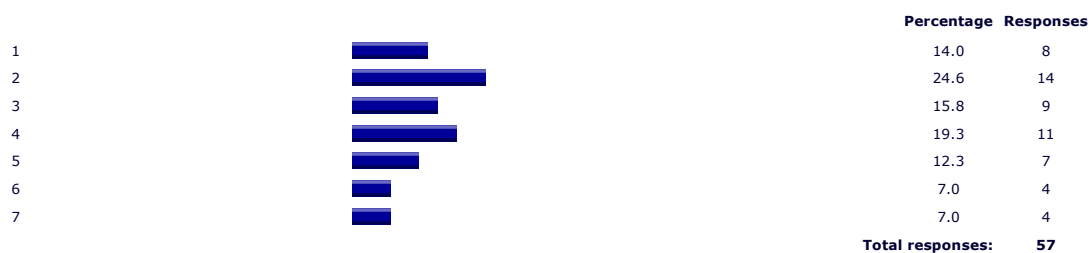


The requirements of international markets.

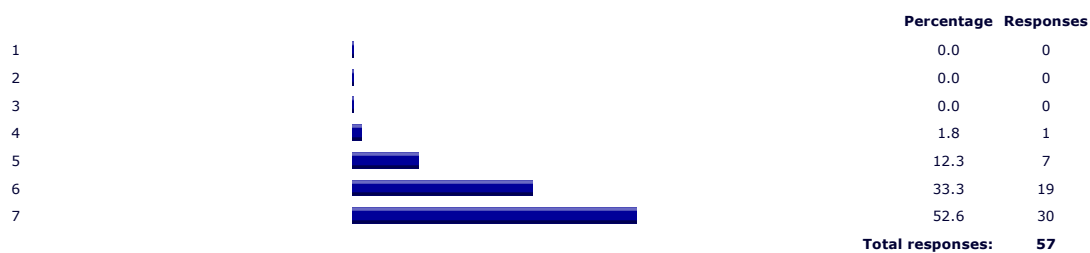


Total responses: 57

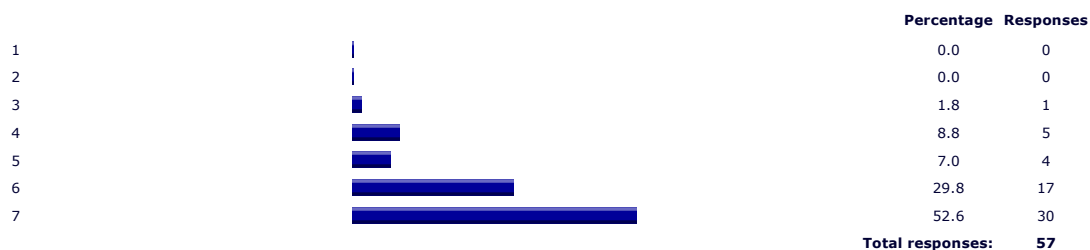
The complaints of local community groups.



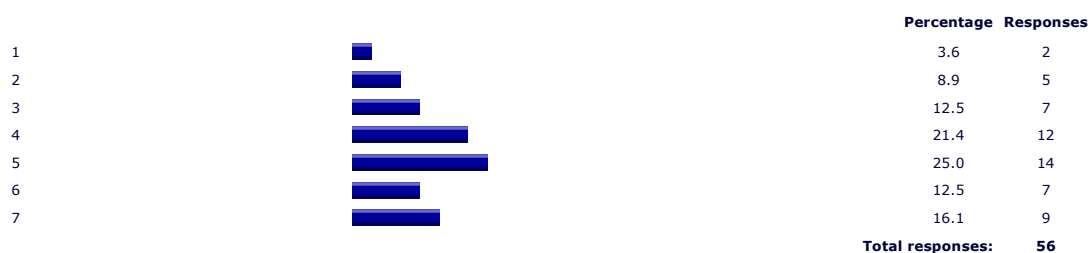
Our winery's commitment to the environment.



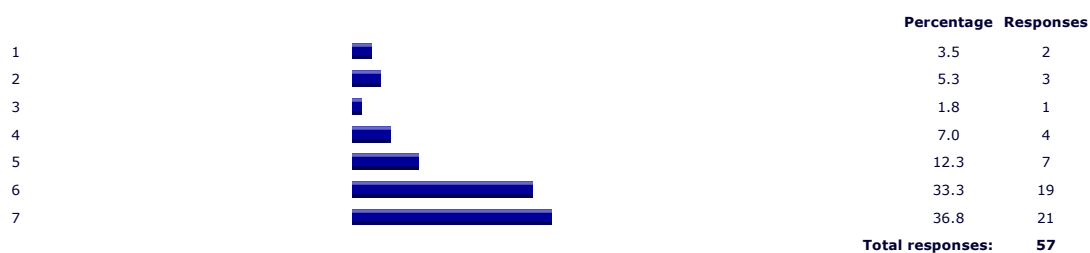
Our belief that using less chemicals will enhance environmental quality.



Our belief that environmental projects reduce costs

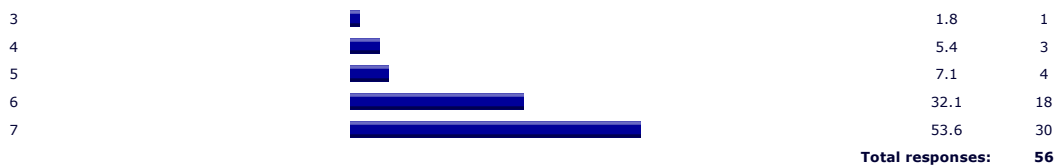


Our need to comply with environmental regulations.

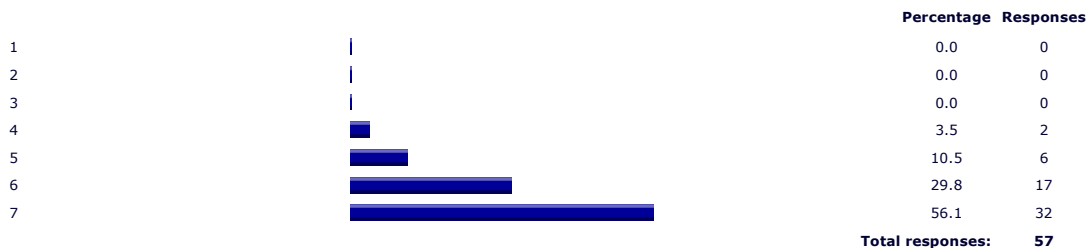


Our concerns about the health and safety of our employees.

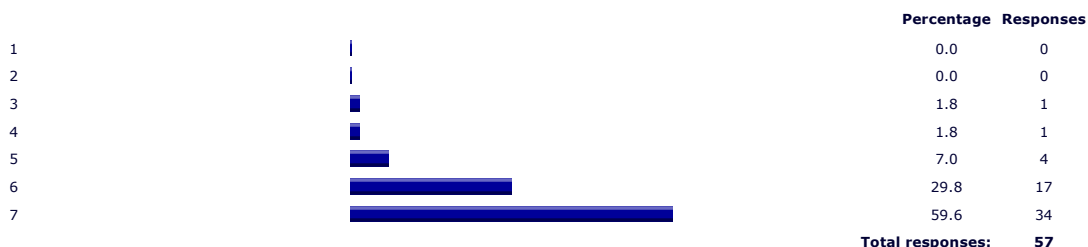




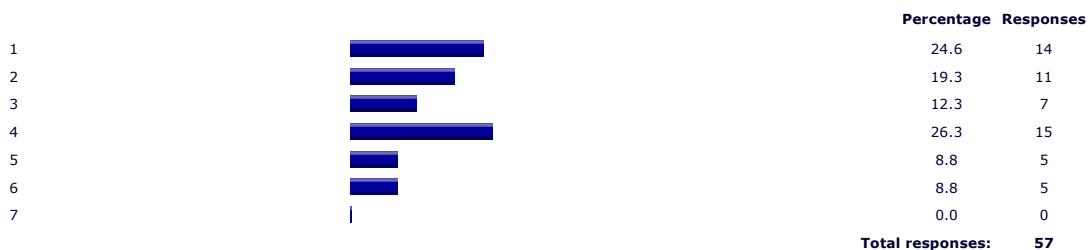
Our desire to maintain a reputable company image.



Our desire to be good stewards of the land.



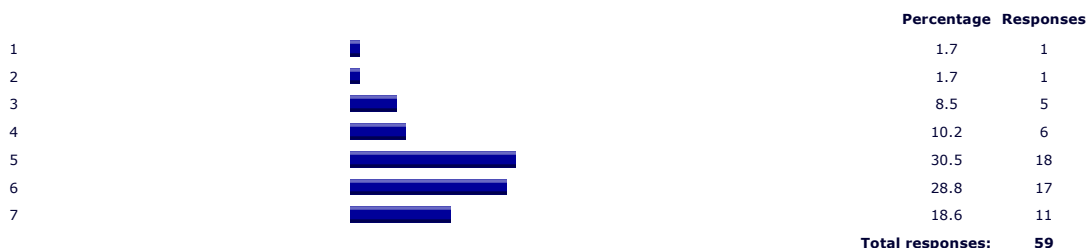
Protests by environmental organizations.



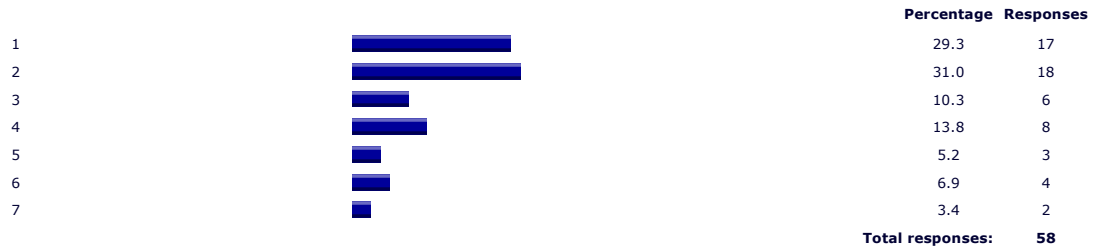
Our desire to limit any future increase of environmental regulations.



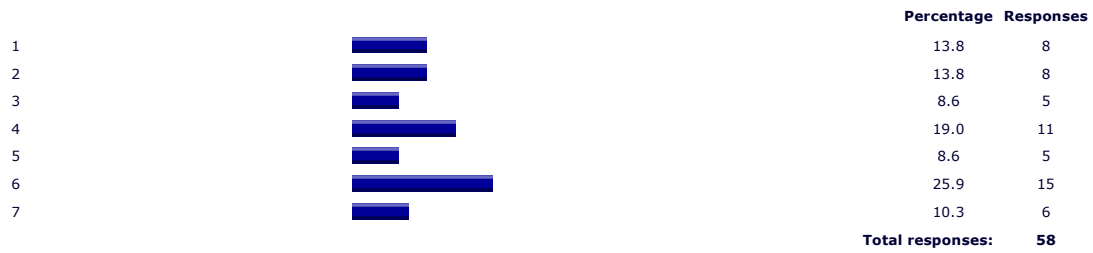
13) At our winery, people feel a personal obligation to do whatever they can to minimize environmental harm.



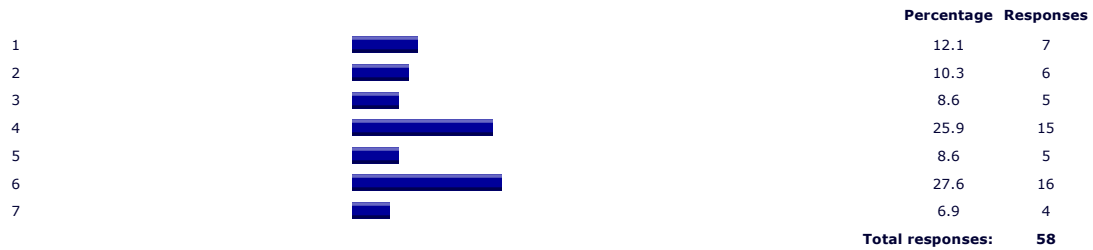
Our winery does not consider environmental criteria when purchasing materials (excluding grapes) from suppliers



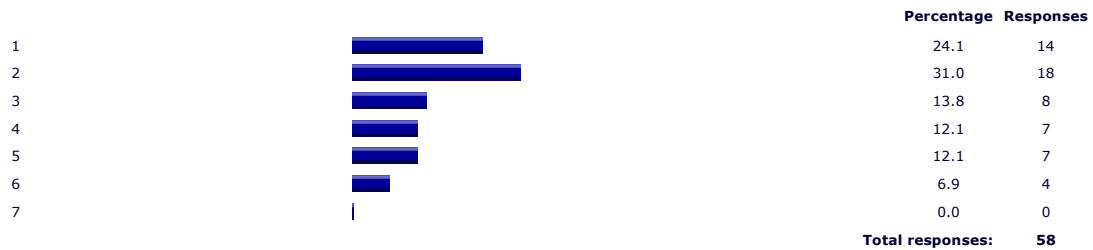
Our winery provides funds for projects intended to improve environmental performance.



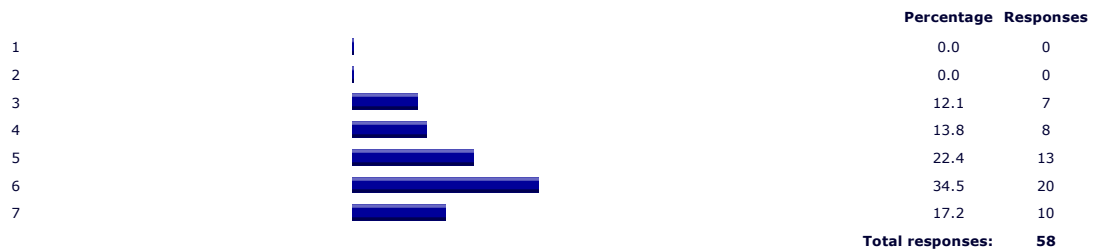
Our winery provides incentives to encourage employees to be more environmentally responsible.



Our winery does not provide adequate support for environmental initiatives



At our winery, people feel a personal obligation to reduce pollution.









Our winery follows established environmental goals and policies.










6		49.1	28
7		22.8	13
		Total responses:	57








Our winery has at least one individual whose responsibilities include coordinating waste reduction activities.

		Percentage	Responses
1		3.4	2
2		6.9	4
3		3.4	2
4		3.4	2
5		8.6	5
6		36.2	21
7		37.9	22
		Total responses:	58








Our winery does not provide environmental training for employees.

		Percentage	Responses
1		12.1	7
2		32.8	19
3		15.5	9
4		8.6	5
5		6.9	4
6		12.1	7
7		12.1	7
		Total responses:	58








At our winery, people feel a personal obligation to exceed the requirements of environmental regulations.

		Percentage	Responses
1		3.4	2
2		5.2	3
3		15.5	9
4		20.7	12
5		10.3	6
6		34.5	20
7		10.3	6
		Total responses:	58

Our winery works with suppliers to reduce waste.

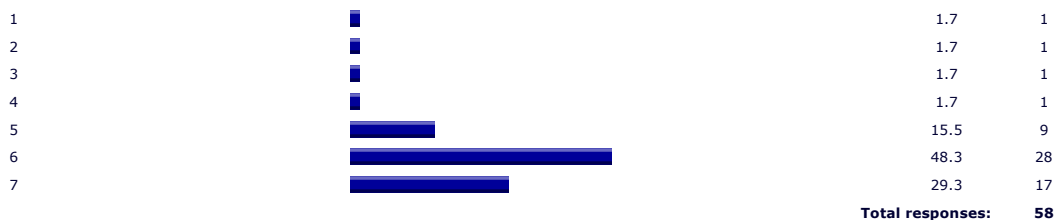
		Percentage	Responses
1		3.4	2
2		8.6	5
3		6.9	4
4		8.6	5
5		22.4	13
6		31.0	18
7		19.0	11
		Total responses:	58

14) Our winery has experienced a substantial amount of pressure to improve environmental performance.

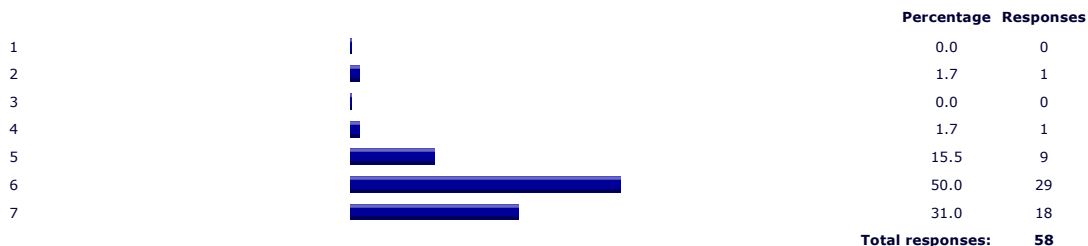
		Percentage	Responses
1		10.5	6
2		21.1	12
3		8.8	5
4		17.5	10
5		24.6	14
6		10.5	6
7		7.0	4
		Total responses:	57

We expect the pressures for improvements in environmental performance will increase in the future.

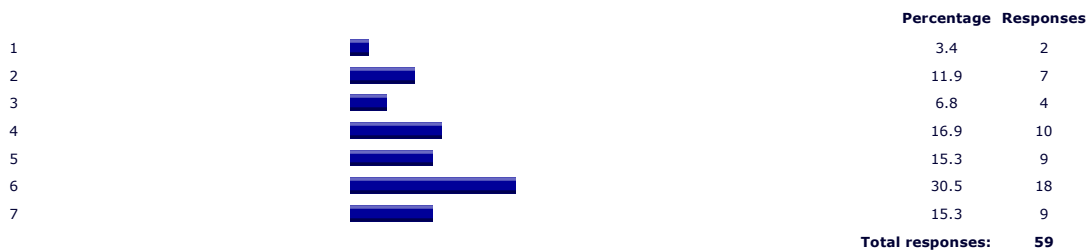
Percentage Responses



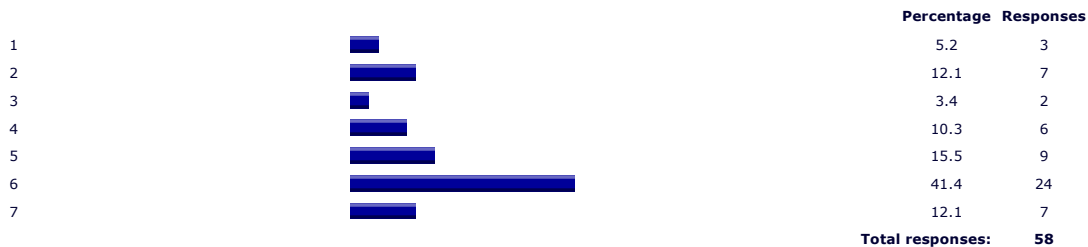
Anti-pollution laws should be enforced more strongly.



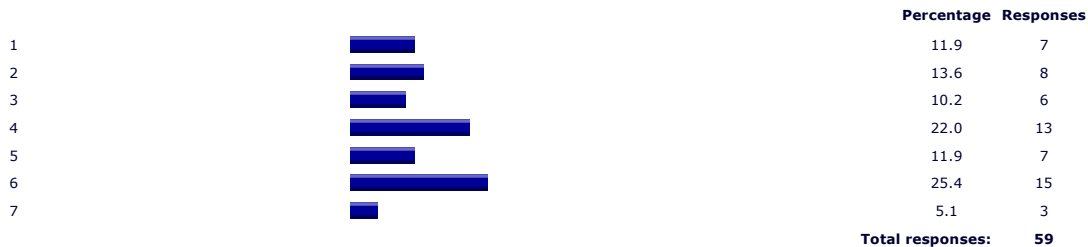
Organic viticulture presents an increased risk of crop failure.



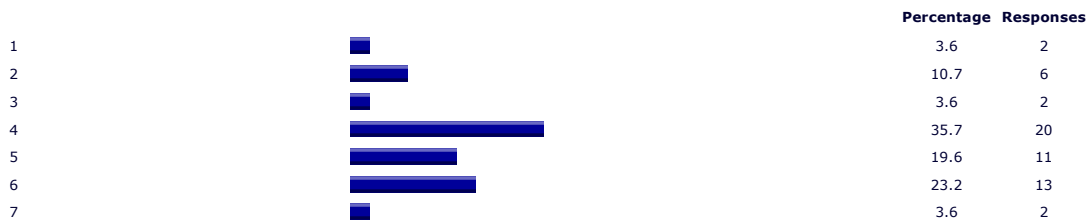
Environmental initiatives lead to increased customer demand.



Organic viticulture is much more work than it is worth.

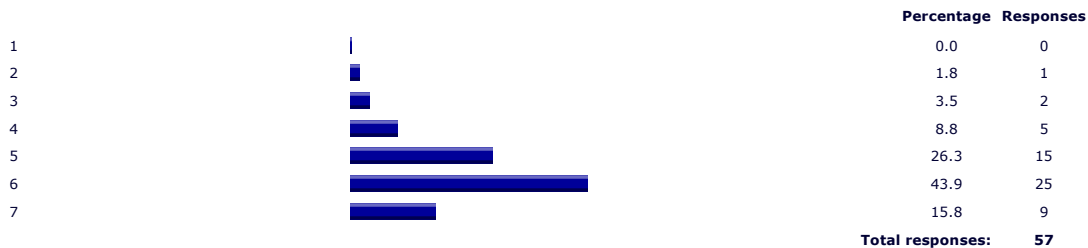


Environmental initiatives lead to less regulatory oversight.

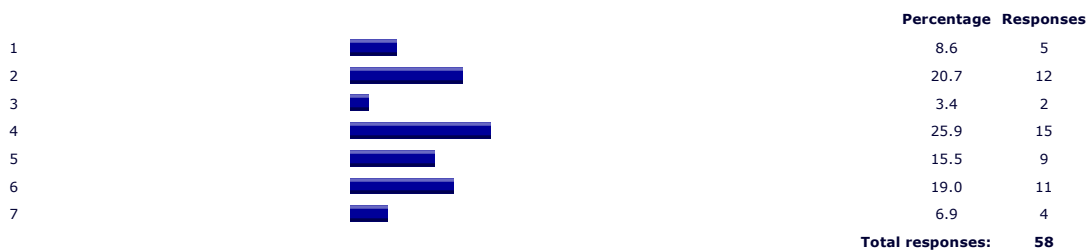


Total responses: 56

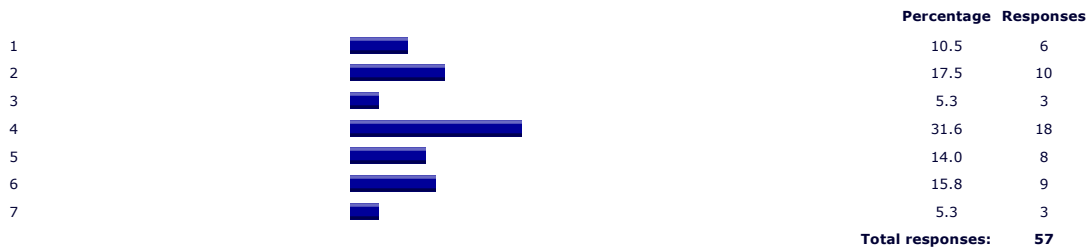
Environmental initiatives lead to enhanced reputation in the community.



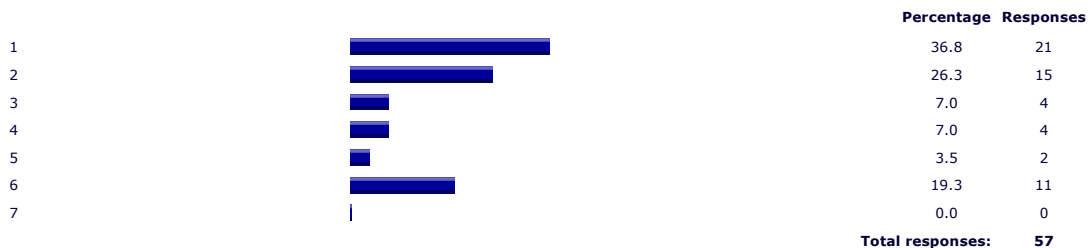
Organic viticulture is too labour intensive.



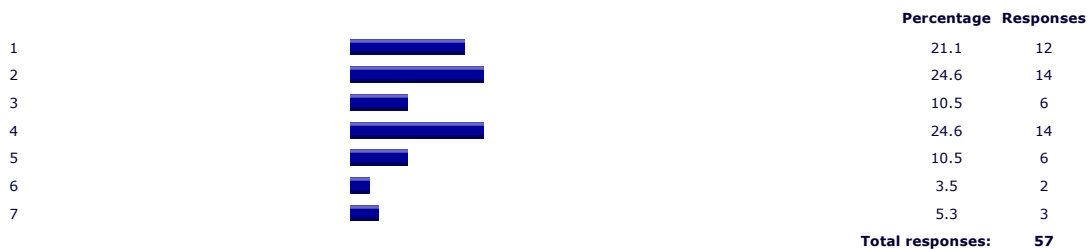
Our winery prefers organic viticulture because it uses less chemicals.



Natural resources should be used for whatever purposes humans desire.








Environmental regulations have placed unfair burdens on industry.





Environmental initiatives lead to cost savings.










3		22.8	13
4		24.6	14
5		12.3	7
6		19.3	11
7		3.5	2
Total responses:		57	








We must take stronger measures to conserve our nation's resources.

		Percentage	Responses
1		1.8	1
2		0.0	0
3		0.0	0
4		5.3	3
5		8.8	5
6		26.3	15
7		57.9	33
Total responses:		57	








Among the fundamental rights in this country is the use of one's property without outside interference.

		Percentage	Responses
1		10.5	6
2		31.6	18
3		15.8	9
4		15.8	9
5		10.5	6
6		12.3	7
7		3.5	2
Total responses:		57	








Organic viticulture improves wine quality.

		Percentage	Responses
1		17.5	10
2		17.5	10
3		12.3	7
4		26.3	15
5		8.8	5
6		10.5	6
7		7.0	4
Total responses:		57	

Property owners have an inherent right to use their land as they see fit.

		Percentage	Responses
1		19.3	11
2		31.6	18
3		15.8	9
4		12.3	7
5		7.0	4
6		10.5	6
7		3.5	2
Total responses:		57	

Environmental regulations have gotten too strict in recent years.

		Percentage	Responses
1		21.1	12
2		19.3	11
3		21.1	12
4		22.8	13
5		10.5	6
6		5.3	3
7		0.0	0
Total responses:		57	

Environmental initiatives lead to improved wine quality.

		Percentage	Responses
1		7.0	4
2		17.5	10
3		8.8	5
4		24.6	14
5		17.5	10
6		17.5	10
7		7.0	4
Total responses:		57	

Where natural resources are privately owned, society should have no control over what the owner does with them.

		Percentage	Responses
1		17.5	10
2		40.4	23
3		15.8	9
4		12.3	7
5		3.5	2
6		7.0	4
7		3.5	2
Total responses:		57	

Property owners have the right to abuse their land even if it becomes unfit for use by future generations.

		Percentage	Responses
1		82.5	47
2		12.3	7
3		1.8	1
4		1.8	1
5		0.0	0
6		1.8	1
7		0.0	0
Total responses:		57	

Organic viticulture is difficult to implement.

		Percentage	Responses
1		7.0	4
2		10.5	6
3		12.3	7
4		21.1	12
5		19.3	11
6		21.1	12
7		8.8	5
Total responses:		57	

Environmental initiatives lead to increased competitiveness in international markets.

		Percentage	Responses
1		5.4	3
2		3.6	2
3		5.4	3
4		14.3	8
5		17.9	10
6		42.9	24
7		10.7	6
Total responses:		56	

15) What percentage of your grapes comes from your own vineyards?

1. %:

16) Approximately what percentage (0-100%) of your vineyard's owned hectares is:

1. Certified organic or biodynamic (certified or in transition) %:

2. Equivalent to organic or biodynamic but not certified %:
3. Part of an IPM (integrated pest management) programme %:
4. Name of programme %:

17) How would you characterize the environmental performance of your vineyard?

	Percentage	Responses
Very low impact on the environment compared to other vineyards	19.6	11
Low impact on the environment compared to other vineyards	42.9	24
Comparable to other vineyards	35.7	20
High impact on the environment compared to other vineyards	0.0	0
Very high impact on the environment compared to other vineyards	1.8	1
Total responses:		56

18) Our vineyards have been successful in reducing or eliminating the use of ...

	1	2	3	4	5	6	7	Responses	Average Score
a) Chemical fertilizers	1 (1.79%)	4 (7.14%)	6 (10.71%)	9 (16.07%)	13 (23.21%)	13 (23.21%)	10 (17.86%)	56	4.93 / 7 (70.43%)
b) Insecticides	1 (1.79%)	1 (1.79%)	9 (16.07%)	6 (10.71%)	12 (21.43%)	18 (32.14%)	9 (16.07%)	56	5.09 / 7 (72.71%)
c) Fungicides (not including sulfur)	1 (1.79%)	5 (8.93%)	8 (14.29%)	15 (26.79%)	10 (17.86%)	13 (23.21%)	4 (7.14%)	56	4.48 / 7 (64.00%)
d) Herbicides	2 (3.64%)	5 (9.09%)	9 (16.36%)	9 (16.36%)	9 (16.36%)	17 (30.91%)	4 (7.27%)	55	4.55 / 7 (65.00%)
e) Sulfur	4 (7.14%)	4 (7.14%)	8 (14.29%)	14 (25.00%)	10 (17.86%)	13 (23.21%)	3 (5.36%)	56	4.30 / 7 (61.43%)
f) Water	1 (1.79%)	9 (16.07%)	3 (5.36%)	9 (16.07%)	14 (25.00%)	12 (21.43%)	8 (14.29%)	56	4.68 / 7 (66.86%)
									4.67 / 7 (66.74%)

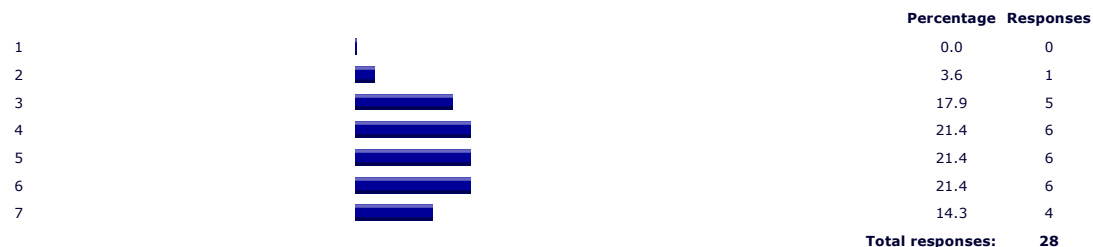
19) Our vineyards have been successful in incorporating ...

	1	2	3	4	5	6	7	Responses	Average Score
a) Habitat restoration initiatives	1 (1.79%)	5 (8.93%)	7 (12.50%)	7 (12.50%)	9 (16.07%)	18 (32.14%)	9 (16.07%)	56	4.93 / 7 (70.43%)
b) Green waste composting	2 (3.57%)	7 (12.50%)	3 (5.36%)	9 (16.07%)	10 (17.86%)	13 (23.21%)	12 (21.43%)	56	4.88 / 7 (69.71%)
c) The promoting of predators to control insect pests	3 (5.36%)	5 (8.93%)	6 (10.71%)	11 (19.64%)	6 (10.71%)	11 (19.64%)	14 (25.00%)	56	4.80 / 7 (68.57%)
d) Erosion control initiatives	0 (0.00%)	1 (1.79%)	1 (1.79%)	7 (12.50%)	8 (14.29%)	28 (50.00%)	11 (19.64%)	56	5.68 / 7 (81.14%)
e) The composting of pomace	3 (5.36%)	4 (7.14%)	3 (5.36%)	10 (17.86%)	6 (10.71%)	19 (33.93%)	11 (19.64%)	56	5.02 / 7 (71.71%)
f) Cover crops	1 (1.79%)	1 (1.79%)	1 (1.79%)	4 (7.14%)	5 (8.93%)	25 (44.64%)	19 (33.93%)	56	5.89 / 7 (84.14%)
g) The measurement of water use in vineyard	1 (1.79%)	1 (1.79%)	1 (1.79%)	8 (14.29%)	6 (10.71%)	19 (33.93%)	20 (35.71%)	56	5.75 / 7 (82.14%)
h) Low volume irrigation systems	1 (1.79%)	1 (1.79%)	2 (3.57%)	6 (10.71%)	8 (14.29%)	18 (32.14%)	20 (35.71%)	56	5.73 / 7 (81.86%)
i) Field monitoring for a variety of pests	1 (1.79%)	3 (5.36%)	7 (12.50%)	4 (7.14%)	6 (10.71%)	23 (41.07%)	12 (21.43%)	56	5.29 / 7 (75.57%)
j) The keeping of written records of water usage	0 (0.00%)	4 (7.14%)	2 (3.57%)	7 (12.50%)	6 (10.71%)	20 (35.71%)	17 (30.36%)	56	5.55 / 7 (79.29%)
									5.35 / 7 (76.46%)

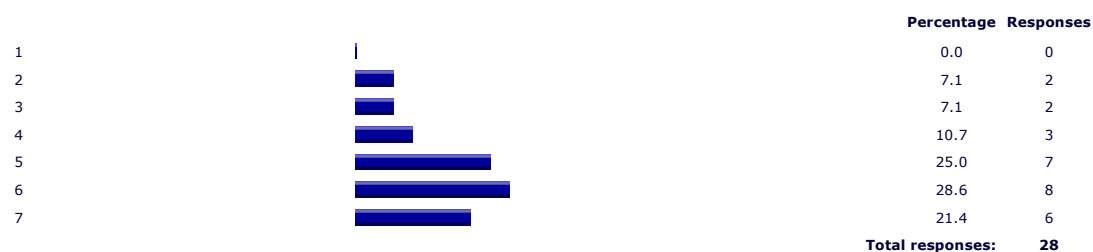
20) If you buy grapes from outside growers, approximately what percentage of your purchased grapes comes from:

1. Certified organic or biodynamic (certified or in transition) %:
2. Equivalent to organic or biodynamic but not certified %:
3. Part of an IPM (integrated pest management) programme %:
4. Name of programme:

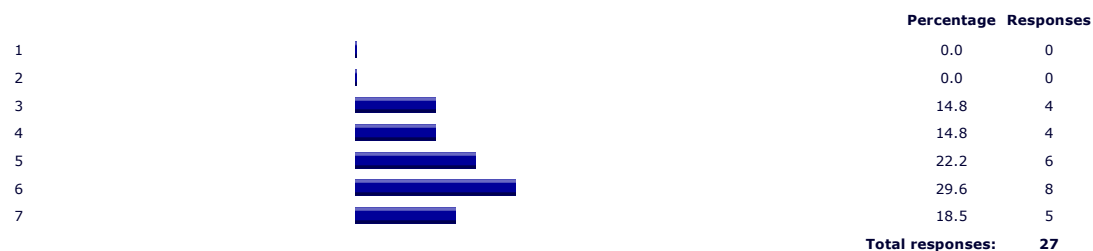
21) We encourage our growers to minimize the use of synthetic chemicals and fertilizers.



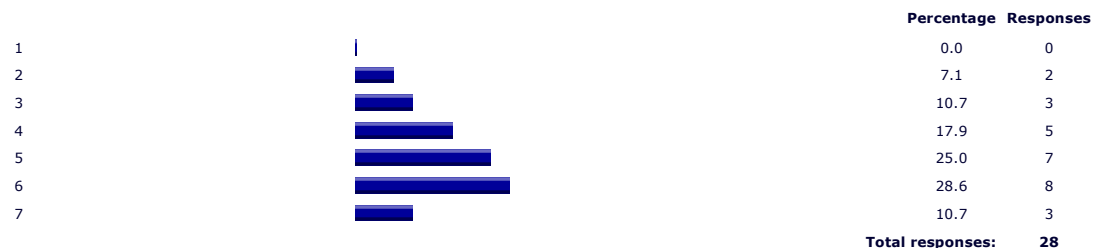
22) We attempt to educate our growers regarding environmental practices we would like them to use.



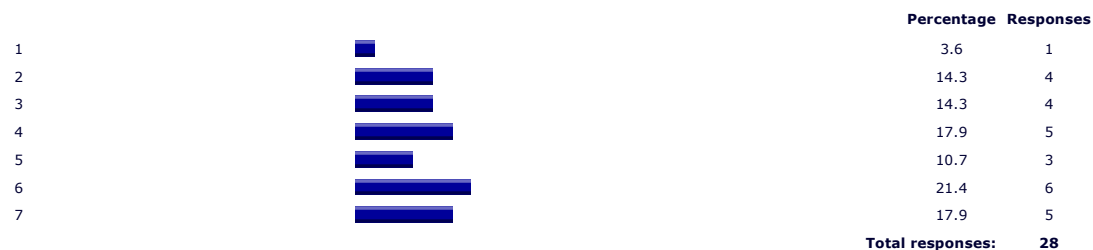
23) We encourage our growers to reduce their water use.



24) We encourage our growers to engage in erosion control initiatives.



25) We encourage our growers to recycle organic matter.



26) How old is the facility that currently houses your winery operations? (Years)

Average: 69.43
 Range: 1<=>1,996
 Median: 12
 Total Responses: 54

27) How would you characterize the environmental performance of your winery compared to other wine producers?

	Percentage	Responses
Very low impact on the environment compared to other vineyards	23.6	13
Low impact on the environment compared to other vineyards	50.9	28
Comparable to other vineyards	18.2	10
High impact on the environment compared to other vineyards	5.5	3
Very high impact on the environment compared to other vineyards	1.8	1
Total responses:		55

28) Our winery has been successful in utilizing...

	1	2	3	4	5	6	7	Responses	Average Score
a) Energy audits	8 (14.55%)	12 (21.82%)	8 (14.55%)	11 (20.00%)	8 (14.55%)	5 (9.09%)	3 (5.45%)	55	3.47 / 7 (49.57%)
b) Waste water ponds	1 (1.85%)	5 (9.26%)	1 (1.85%)	6 (11.11%)	9 (16.67%)	18 (33.33%)	14 (25.93%)	54	5.35 / 7 (76.43%)
c) Solid waste audits	7 (12.96%)	5 (9.26%)	2 (3.70%)	9 (16.67%)	5 (9.26%)	16 (29.63%)	10 (18.52%)	54	4.63 / 7 (66.14%)
d) Energy efficient lighting	3 (5.45%)	3 (5.45%)	7 (12.73%)	5 (9.09%)	10 (18.18%)	21 (38.18%)	6 (10.91%)	55	4.87 / 7 (69.57%)
e) Energy efficient equipment	2 (3.70%)	8 (14.81%)	8 (14.81%)	9 (16.67%)	7 (12.96%)	12 (22.22%)	8 (14.81%)	54	4.46 / 7 (63.71%)
f) Renewable energy sources	12 (21.82%)	15 (27.27%)	8 (14.55%)	7 (12.73%)	4 (7.27%)	6 (10.91%)	3 (5.45%)	55	3.11 / 7 (44.43%)
									4.31 / 7 (61.58%)

29) Our winery has been successful in implementing initiatives to reduce...

	1	2	3	4	5	6	7	Responses	Average Score
a) Energy use in the winery	3 (5.45%)	7 (12.73%)	6 (10.91%)	8 (14.55%)	10 (18.18%)	14 (25.45%)	7 (12.73%)	55	4.55 / 7 (65.00%)
b) Water use in the winery	1 (1.82%)	3 (5.45%)	5 (9.09%)	1 (1.82%)	8 (14.55%)	26 (47.27%)	11 (20.00%)	55	5.44 / 7 (77.71%)
c) Solid waste in the winery	0 (0.00%)	2 (3.64%)	1 (1.82%)	4 (7.27%)	12 (21.82%)	25 (45.45%)	11 (20.00%)	55	5.64 / 7 (80.57%)
d) Toxic chemicals in the winery	0 (0.00%)	1 (1.85%)	2 (3.70%)	4 (7.41%)	6 (11.11%)	22 (40.74%)	19 (35.19%)	54	5.91 / 7 (84.43%)
									5.38 / 7 (76.89%)

30) Our winery has been successful in implementing procedures for measuring and monitoring

	1	2	3	4	5	6	7	Responses	Average Score
a) Water use in the winery	2 (3.64%)	5 (9.09%)	0 (0.00%)	5 (9.09%)	9 (16.36%)	13 (23.64%)	21 (38.18%)	55	5.49 / 7 (78.43%)
b) Energy use for process cooling	3 (5.45%)	8 (14.55%)	9 (16.36%)	13 (23.64%)	11 (20.00%)	5 (9.09%)	6 (10.91%)	55	4.09 / 7 (58.43%)
c) Energy use for heating, ventilation and air conditioning of facilities	3 (5.45%)	10 (18.18%)	7 (12.73%)	16 (29.09%)	6 (10.91%)	7 (12.73%)	6 (10.91%)	55	4.04 / 7 (57.71%)
									4.54 / 7 (64.86%)

31) Our winery has been successful in recycling...

	1	2	3	4	5	6	7	Responses	Average Score
a) Polyethylene	3 (5.45%)	7 (12.73%)	1 (1.82%)	11 (20.00%)	5 (9.09%)	18 (32.73%)	10 (18.18%)	55	4.85 / 7 (69.29%)
b) Cardboard packaging	2 (3.64%)	6 (10.91%)	2 (3.64%)	4 (7.27%)	0 (0.00%)	21 (38.18%)	20 (36.36%)	55	5.49 / 7 (78.43%)
c) Pomace and lees	0 (0.00%)	3 (5.45%)	3 (5.45%)	2 (3.64%)	6 (10.91%)	23 (41.82%)	18 (32.73%)	55	5.76 / 7 (82.29%)
d) Pallets	0 (0.00%)	2 (3.64%)	1 (1.82%)	4 (7.27%)	3 (5.45%)	22 (40.00%)	23 (41.82%)	55	6.02 / 7 (86.00%)
e) Glass	1 (1.85%)	2 (3.70%)	3 (5.56%)	2 (3.70%)	3 (5.56%)	22 (40.74%)	21 (38.89%)	54	5.85 / 7 (83.57%)
f) Wastewater from winery operations	2 (3.64%)	5 (9.09%)	3 (5.45%)	3 (5.45%)	4 (7.27%)	18 (32.73%)	20 (36.36%)	55	5.47 / 7 (78.14%)
									5.57 / 7 (79.61%)

32) Within the next twelve months, our winery intends to (decrease/increase)...

	-3	-2	-1	0	1	2	3	Responses	Average Score
a) the use of chemicals in our vineyards.	9 (16.07%)	13 (23.21%)	18 (32.14%)	11 (19.64%)	1 (1.79%)	4 (7.14%)	0 (0.00%)	56	2.89 / 7 (41.29%)
b) the use of organic viticulture methods.	3 (5.36%)	0 (0.00%)	1 (1.79%)	25 (44.64%)	13 (23.21%)	10 (17.86%)	4 (7.14%)	56	4.63 / 7 (66.14%)
c) practices that reduce solid waste.	2 (3.57%)	2 (3.57%)	5 (8.93%)	18 (32.14%)	12 (21.43%)	15 (26.79%)	2 (3.57%)	56	4.59 / 7 (65.57%)
d) practices that conserve energy.	1 (1.79%)	2 (3.57%)	2 (3.57%)	13 (23.21%)	16 (28.57%)	16 (28.57%)	6 (10.71%)	56	5.02 / 7 (71.71%)
e) practices that conserve soil.	1 (1.79%)	0 (0.00%)	2 (3.57%)	13 (23.21%)	12 (21.43%)	17 (30.36%)	11 (19.64%)	56	5.32 / 7 (76.00%)
f) activities that conserve water.	1 (1.79%)	1 (1.79%)	4 (7.14%)	9 (16.07%)	10 (17.86%)	22 (39.29%)	9 (16.07%)	56	5.29 / 7 (75.57%)
g) our efforts to recycle solid waste.	1 (1.79%)	0 (0.00%)	2 (3.57%)	16 (28.57%)	14 (25.00%)	14 (25.00%)	9 (16.07%)	56	5.14 / 7 (73.43%)
h) composting of organic material.	0 (0.00%)	2 (3.57%)	3 (5.36%)	17 (30.36%)	9 (16.07%)	14 (25.00%)	11 (19.64%)	56	5.13 / 7 (73.29%)
									4.75 / 7 (67.88%)