The 2003 New Zealand Wineries’ Survey

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Presentation CAUTHE 2000

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National Winery Survey 2003

- Repeat (with modifications) of the 1997/8 National Winery Survey

- Focuses on the supply of wine tourism products and services, with emphasis on:
  - Winery and visitor profiles
  - Sales and marketing activity
  - Respondent detail

- Sought the wineries attitudes toward wine tourism, as well as their relationships to key wine and food tourism stakeholders
National Winery Survey 2003

- 419 surveys posted in May 2003
- 121 (28.8%) useable responses received
- Hawkes Bay, Marlborough & Central Otago wine regions returned the most responses
- Only Bay of Plenty, New Zealand’s smallest wine region in terms of land under vine, did not return a single response
Winery Profile

- 26.4% of wineries first opened to the public in the four years leading up to the survey
  - In comparison, 41.1% did so in the four years leading to the 1997 survey

- Turnover in excess of $750,000 was reported by 28.3% of respondents compared with 25% in ’98, while 20.4% reported falling into the less than $50,000 category (unchanged from ‘98)
Winery Profile Continued…

• Cellar door access declines
• Tasting fee charging declines
• Fee refunds increase

![Diagram showing changes in winery profile features between 1998 and 2003](image)
Visitor Profile

- Increase in visitors from the 40+ age groups
- Gender remains constant at a 50/50 split
- Level of visitors from overseas rose 14.3% to 32.2%
Visitor Profile

- Increase in wine knowledge visitors
- Interestingly, ‘no systematic way of collecting visitor information’ still prevails in 2003
Sales & Marketing

– Three most stated reasons for winery visitation are:
  • Tasting wines 91.5%
  • Buying wines 82.9%
  • Learning about wines 57.3%

– Three most offered services are:
  • Wine tasting 91.1%
  • Winery tours 50.6%
  • Tasting and snack foods 40.5%
Sales.....

– Availability of wine outside the cellar door:
  • Wines not available locally 8.1%

– Most likely place to find the wines
  • Local cafes and restaurants 93.1%
  • Specialty wine stores 88.2%
  • Supermarkets 59.8%
Marketing....

– 52.2% of wineries form part of a commercially run tour, compared to 45.4 in ’97

– 79.8% attend one or more wine and food festivals
  • Harvest Hawkes Bay being the most frequented (19.2% of respondents)

– The most preferred information sources to attract visitors
  • Wine trail or road signage 63.4%
  • Regional wineries’ brochures 55.0%
  • Wine and food festivals 54.8%
The Value of Tourism....

– 73.2% either agree or strongly agree that wine tourism enhances product/brand awareness
  • Compares with 72.4% in ’97

– 54.2% believe wine tourism is a catalyst for mail order sales growth
  • Compares with 51% in ’97

– 69.8% either agree or strongly agree that customer education is a valued output of wine tourism
Overall Attitudes Toward Wine Tourism

– Overall, attitudes towards wine tourism are more positive in 2003

Graph showing:
- Tourism is valuable
- Provides marketing opportunities
- Time spent with visitors is valuable
- Benefits outweigh negatives
- Does not attract kind of visitor I want

Comparison between 1997 and 2003
Summary

– Increased number of wineries with turnover in excess of $750,000
– Cellar door access declining
– Fee charging declining
– Overseas and 40 plus age group visitors increasing
– Wine lover segment increasing
– Wine tasting is the predominant reason for visiting
– Increasing number of wineries forming part of a commercial wine tour
Summary Continued

– Wine trail and road signage is the preferred method of promotion

– Overall, attitudes toward wine tourism are becoming more favourable