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## **The 2003 New Zealand Wineries' Survey**

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## **Introduction : The 2003 New Zealand Wineries' Survey**

In 1997/98 a survey was conducted of New Zealand wineries with respect to their attitudes towards wine tourism and their relationship to key wine and food tourism stakeholders (Hall & Johnson, 1998). The survey was the first national level survey of the supply of the wine tourism product conducted in the world. The present paper presents the results of a slightly modified version of the previous national winery 1997/98 survey which was conducted in the May-July 2003. The paper highlights some preliminary results and conclusions derived from the survey results.

## **Method**

The New Zealand Wineries' Survey was devised to gain information about wine tourism in New Zealand directly from wine producers. Survey questions were developed by the research team, and also adapted questions from previous New Zealand and international wine tourism research (e.g., Golledge & Maddern, 1994; Dodd & Bigotte, 1995; Maddern & Golledge, 1996; Macionis, 1997). The results of the first New Zealand Wineries' Survey were presented in several research outputs (e.g. Hall & Johnson, 1998; Hall et al., 2000). The questions in the 2003 survey are similar to the original survey though modifications have been made as a result of the emergence of new issues, i.e. biosecurity, and the results of wine tourist surveys (e.g. Hall et al., 2000; Mitchell & Hall, 2001a, 2001b). Although space precludes a full discussion of the survey's contents and results it may be useful to note that the survey was divided into four sections: winery profile, visitor profile, tourism and marketing (including network relationships), and respondent details.

In both surveys the sample set was the total population of registered grape wine wineries in New Zealand. In the 1997/98 survey 270 surveys were posted, 111 (41.1%) replies were received of which 104 (38.5%) were usable. In the 2003 survey 419 surveys were posted, 129 (30.8%) replied, with 121 (28.9%) being usable responses.

### **Preliminary Results**

12.5% of the 2003 responses first opened their winery to the public in the year 2000, while 26.4% opened for the first time in the four years leading up to the survey. In comparison, 41.1% of the 1997 responses had opened their winery to the public in the four years leading up to that survey.

### **Visitor Profile**

Although based solely on winery staff perceptions, it would appear there has been a significant shift in visitor characteristics. In 1997, the wine lover segment attributed for 13.6% of visitors, while 2003 shows a twofold increase to 26.8%. Wine interested visitors remain constant at 65% and 65.9% respectively, while a significant decline is noted in the 'curious' segment falling from 21.4% in 1997, to 7.3% in 2003 (Figure 1). A 50/50 gender split continues, although the origin of these visitors has moved significantly. In 1997 it was estimated that 82% originated from New Zealand, while in 2003 this has fallen to 67.7%, a shift of 14.3 percentage points in favour of overseas visitors.

### **Visitor age**

In terms of visitor age, Figure 1.2 indicates a perceived shift toward older visitors, with all categories from 40 years of age and above showing an increase. The most significant increase was in the 50-59 years of age group, growing 3.7 percentage points, while the other significant change was in the 18-29 years of age group, which fell 6 percentage points.

### **The importance of wine tourism**

Wine tourism is seen as important in terms of:

- enhancing product/brand awareness
- helping to differentiate one wineries wine from another
- helping to develop mail order sales
- and more recently (2003 survey only), helping to educate customers.

As Table 1 indicates, little has changed in terms of the belief that wine tourism enhances product/brand awareness, with those either agreeing or strongly agreeing with this statement totalling 72.4% in 1997 and 73.2% in 2003. However, when it comes to wine's tourism's role differentiating their wine from another winery's, it would appear winery owners are less inclined to agree that wine tourism is of value as a differentiation strategy than they were in 1997 (Table 2). Previously 49% either agreed or strongly agreed with this statement, while the 2003 results show 44.8% now believing this. In 1997, 51% of wineries either agreed or strongly agreed that wine tourism was a catalyst for mail order growth. In 2003, 54.2% felt this way, suggesting continuing attachment of significant value in wine tourism for mail order sales growth (Table 3).

As a result of research indicating the importance of education as a customer motivation for engaging in wine tourism (Mitchell & Hall 2001a, 2001b) wineries were also asked whether customer education was a valued outcome of wine tourism in the 2003 survey (Table 4). 69.8% of respondents either agreed or strongly agreed with this statement, suggesting customer education is seen as an component of wine tourism by the industry as well as the consumer.

### **Winery attitudes toward wine tourism**

Significant differences in the attitude toward wine tourism are evident between 1997 and 2003 with the attitude generally becoming more positive (Table 5). Particularly significant shifts have occurred in:

- Tourists are valuable - this sees an increase of 13.5 percentage points in those either agreeing or strongly agreeing with this statement.
- Tourism provides significant marketing opportunities – again 13.3 percentage point shift in agreement with this statement
- Time spent with visitors to my winery is valuable – already high at 72.9% in 1997, agreement with this statement increases 11.8 percentage points to 84.7%
- The overall benefits of tourism outweigh the negative impacts – 8.3 percentage point increase in the belief that the positives outweigh the negatives when it comes to wine tourism.
- Tourism does not attract the kind of visitors I want to my winery – in 1997, 21.7% of respondents agreed with this statement, however, 2003 has seen this fall 8.4 percentage points to 13.3%.

In summary, it can be concluded that wine tourism is now looked on even more positively than it was in 1997. Arguably this may be because of greater awareness of the value of wine tourism as conveyed through specific conferences and seminars on wine tourism, as well as the publication of research results and the development of wine and food tourism networks. However, regardless of the reasons why it is apparent that industry perceive wine tourism as a significant opportunity to increase their wine sales.

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Figure 1 Visitor market segments

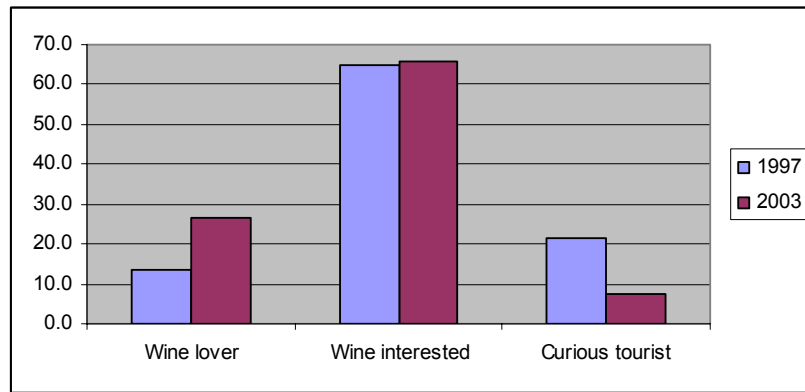


Figure 2 Visitor age

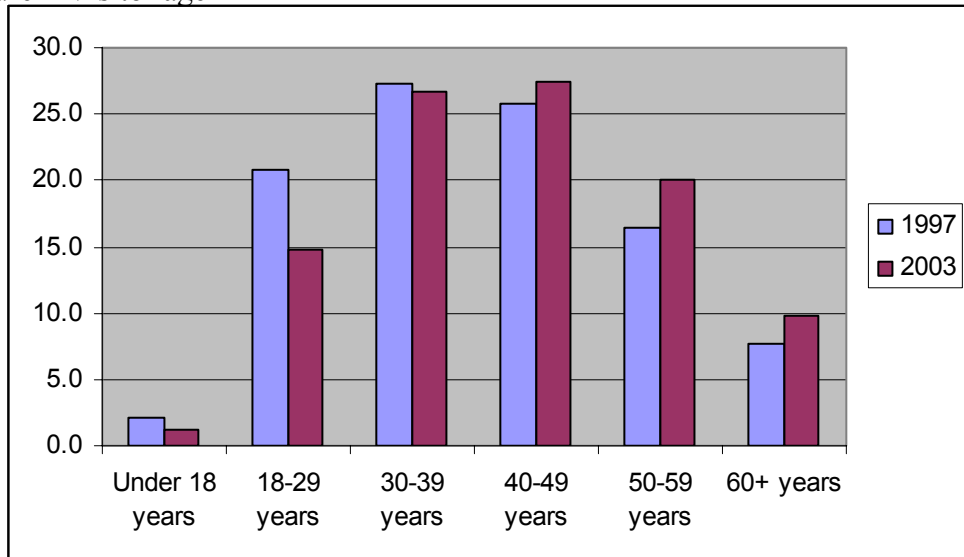


Table 1 Wine tourism enhances brand awareness

| Enhances brand awareness |             |             |
|--------------------------|-------------|-------------|
|                          | <b>1997</b> | <b>2003</b> |
| Strongly Agree           | 21.4        | 25.8        |
| Agree                    | 51.0        | 47.4        |
| Unsure                   | 17.3        | 22.7        |
| Disagree                 | 10.2        | 3.1         |
| Strongly Disagree        | 0           | 1.0         |

Table 2 Wine tourism differentiates my wine from others

| <b>Differentiates my wine from others</b> |             |             |
|---|-------------|-------------|
|   | <b>1997</b> | <b>2003</b> |
| Strongly Agree                            | 14.3        | 10.4        |
| Agree                                     | 34.7        | 34.4        |
| Unsure                                    | 27.6        | 38.5        |
| Disagree                                  | 23.5        | 15.6        |
| Strongly Disagree                         | 0           | 1.0         |

Table 3 Wine tourism helps develop mail order sales

| <b>Helps develop mail order sales</b> |             |             |
|---------------------------------------|-------------|-------------|
|                                       | <b>1997</b> | <b>2003</b> |
| Strongly Agree                        | 14.3        | 12.5        |
| Agree                                 | 36.7        | 41.7        |
| Unsure                                | 26.5        | 26.0        |
| Disagree                              | 17.3        | 15.6        |
| Strongly Disagree                     | 5.1         | 4.2         |

Table 4 Wine tourism helps educate my customers

| <b>Helps educate my customer</b> |             |
|----------------------------------|-------------|
|                                  | <b>2003</b> |
| Strongly Agree                   | 17.7        |
| Agree                            | 52.1        |
| Unsure                           | 20.8        |
| Disagree                         | 7.3         |
| Strongly Disagree                | 2.1         |

Table 5 Winery attitudes toward wine tourism

|   | <b>1997<br/>Strongly<br/>agree / agree</b> | <b>2003<br/>Strongly<br/>agree / agree</b> |
|---|--|--|
| Cellar door visitors do not buy much wine                         | 25.9                                       | 29.4                                       |
| Tourists are valuable   | 65.5                                       | 82.6                                       |
| Tourism attracts a wide range of customers to my winery           | 69.1                                       | 69.1                                       |
| Tourism provides significant marketing opportunities              | 56.1                                       | 69.4                                       |
| Tourism positively impacts the sales of my wine offshore          | N/a  | 45.7                                       |
| Time spent with visitors to my winery is valuable                 | 72.9                                       | 84.7                                       |
| Tourism does not contribute greatly to my business success        | 28.9                                       | 28.5                                       |
| The overall benefits of tourism outweigh the negative impacts     | 68.8                                       | 77.1                                       |
| Tourism does not attract the kind of visitors I want to my winery | 21.7                                       | 13.3                                       |