

Presented at the CAUTHE conference in Brisbane, Queensland, 2004

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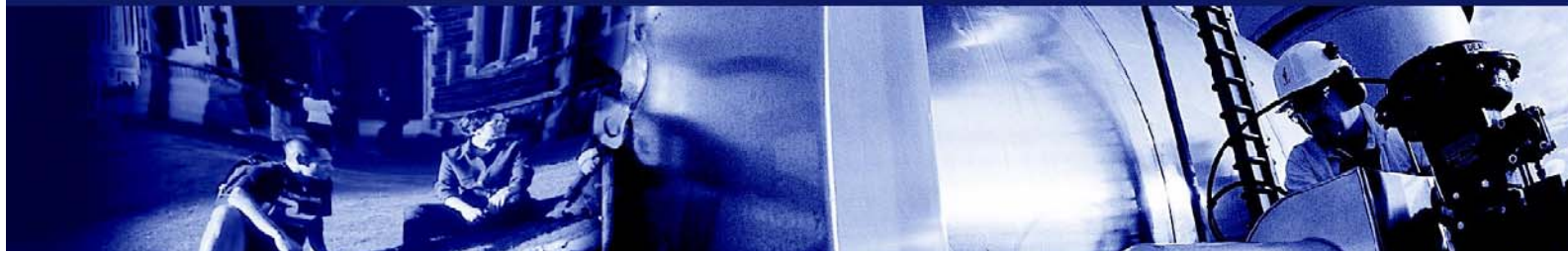
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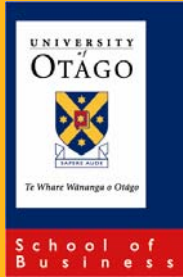
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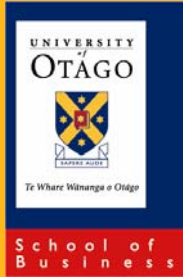


The 2003 New Zealand Wineries' Survey

Christensen, D.; Hall, C.M. &
Mitchell, R.

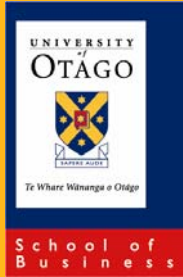
Presentation CAUTHE 2000

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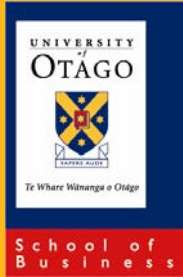
National Winery Survey 2003

- 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



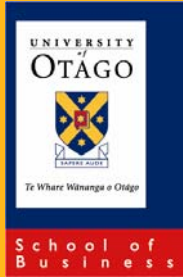
National Winery Survey 2003

- 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



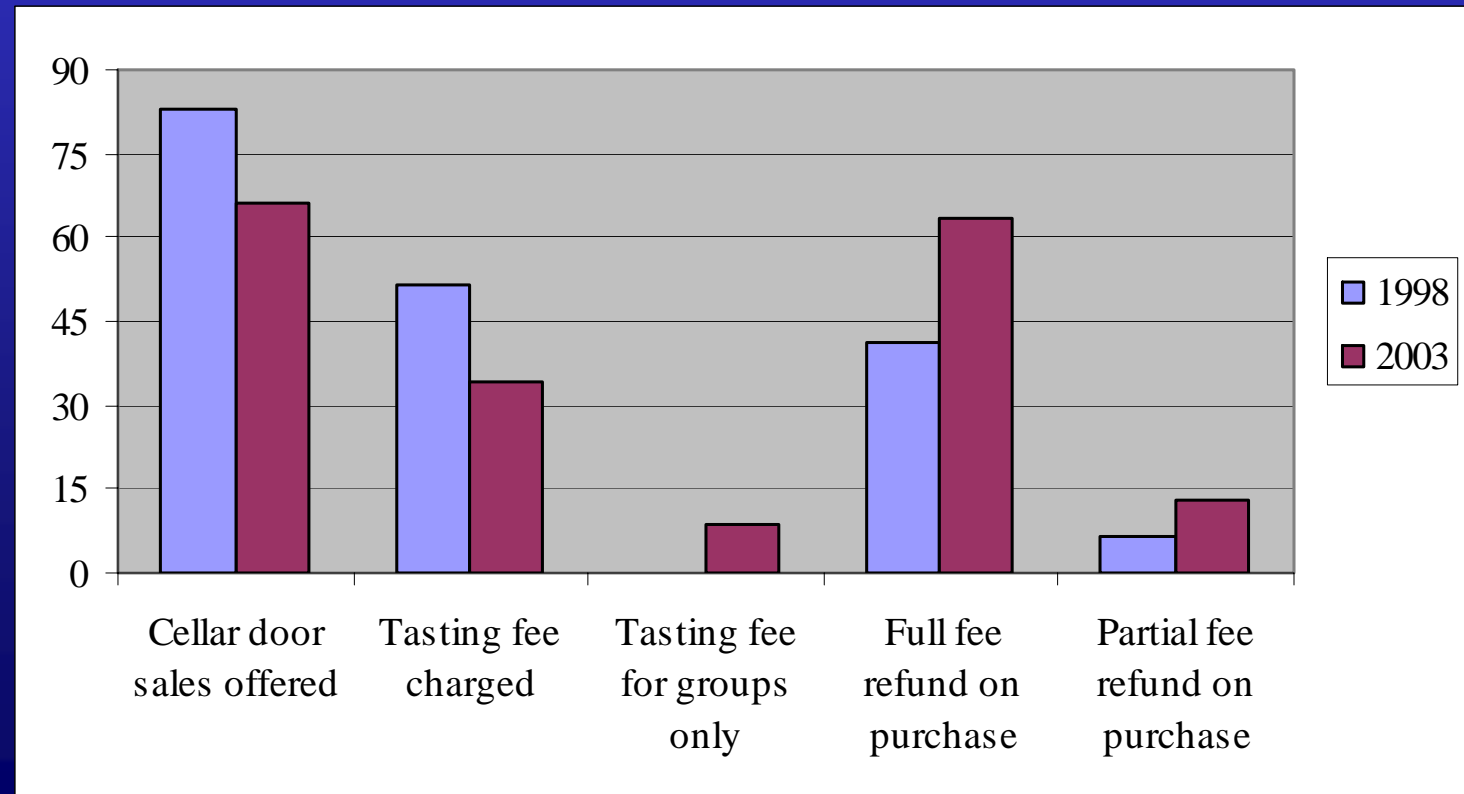
Winery Profile

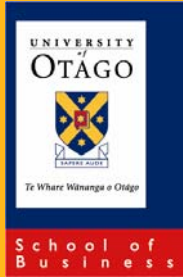
- 26.4% of wineries first opened to the public in the four years leading up to the survey
 - In comparison, 41.1% did so in the four years leading to the 1997 survey
- Turnover in excess of \$750,000 was reported by 28.3% of respondents compared with 25% in '98, while 20.4% reported falling into the less than \$50,000 category (unchanged from '98)



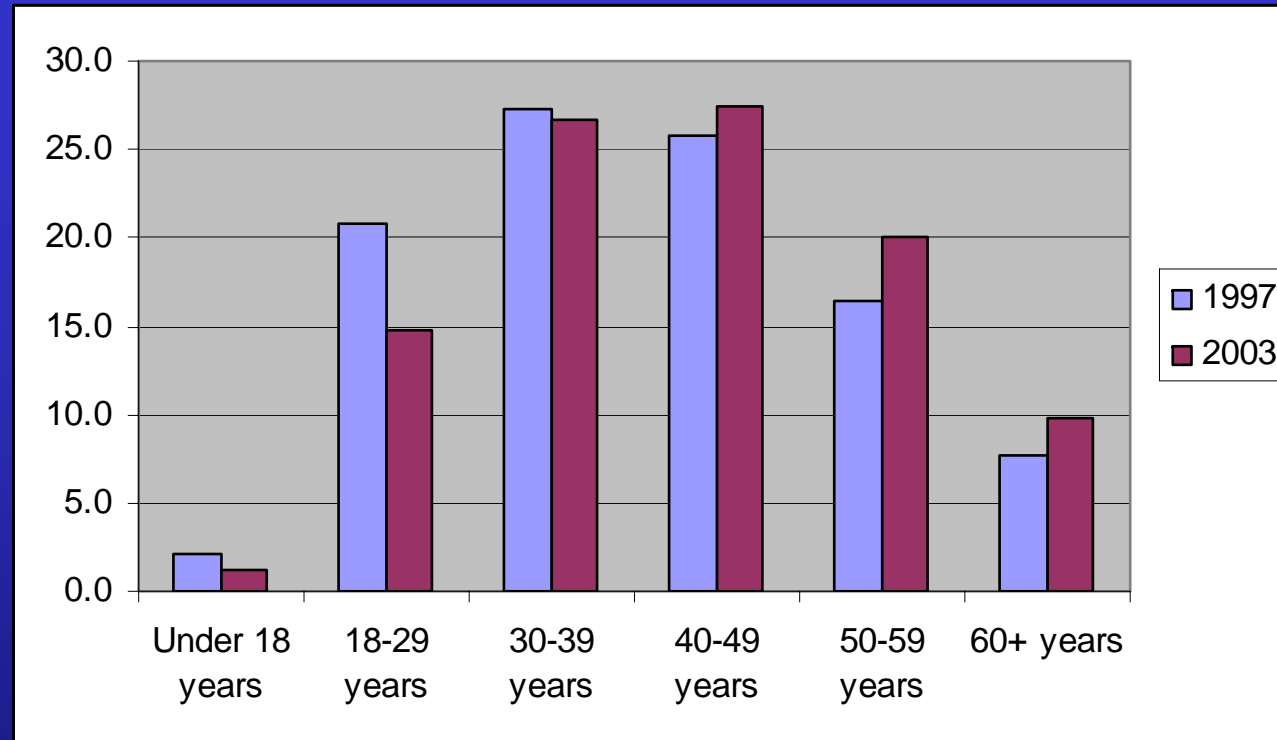
Winery Profile Continued...

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



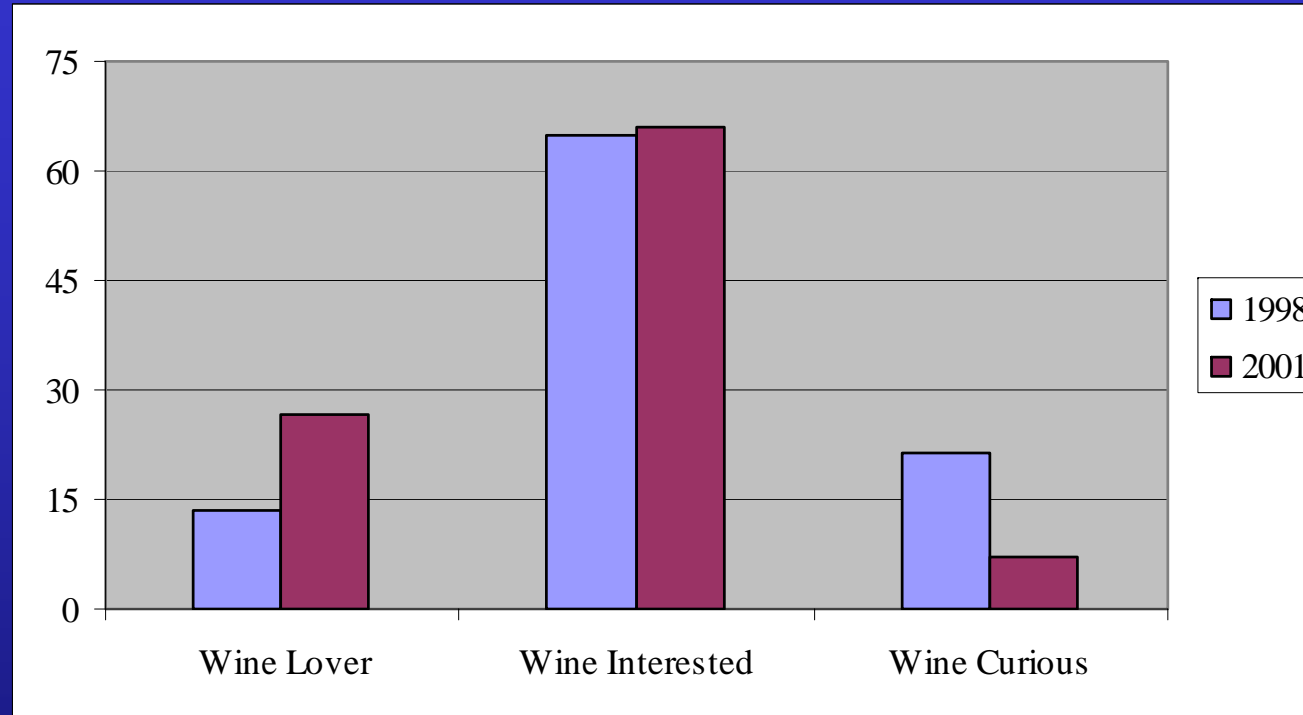


Visitor Profile

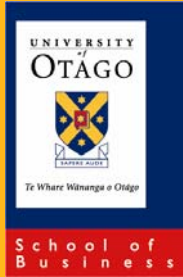


- Increase in visitors from the 40+ age groups
- Gender remains constant at a 50/50 split
- Level of visitors from overseas rose 14.3% to 32.2%

Visitor Profile



- Increase in wine knowledge visitors
- Interestingly, 'no systematic way of collecting visitor information' still prevails in 2003



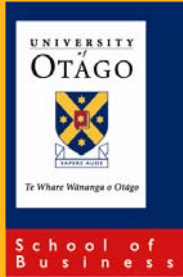
Sales & Marketing

– Three most stated reasons for winery visitation are:

- Tasting wines 91.5%
- Buying wines 82.9%
- Learning about wines 57.3%

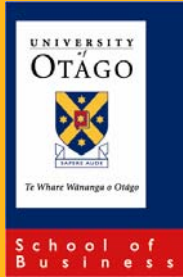
– Three most offered services are:

- Wine tasting 91.1%
- Winery tours 50.6%
- Tasting and snack foods 40.5%



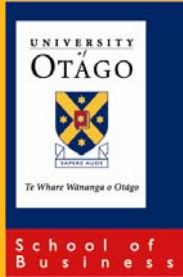
Sales.....

- 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%



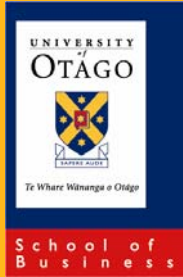
Marketing....

- 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%



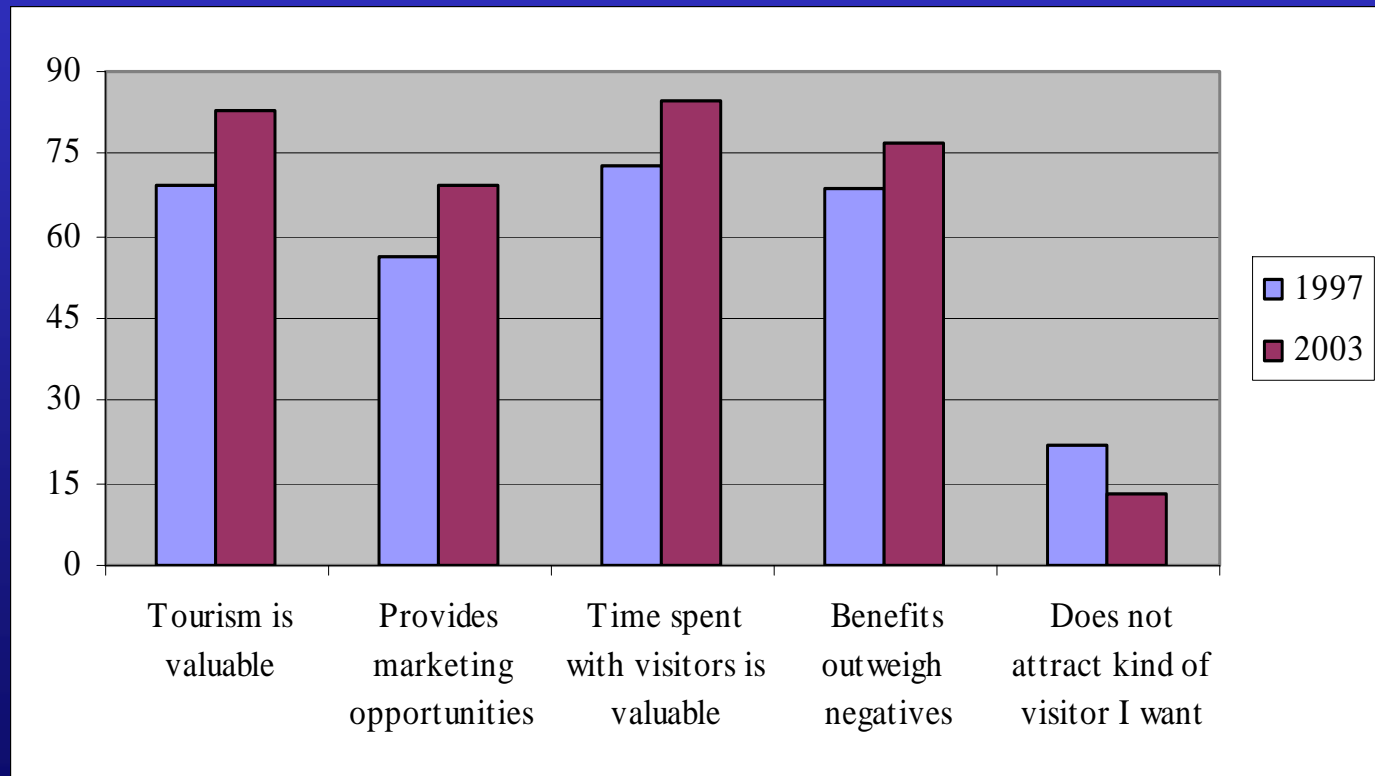
The Value of Tourism....

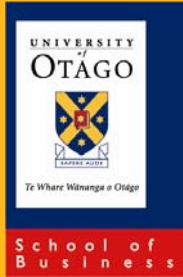
- 73.2% either agree or strongly agree that wine tourism enhances product/brand awareness
 - Compares with 72.4% in '97
- 54.2% believe wine tourism is a catalyst for mail order sales growth
 - Compares with 51% in '97
- 69.8% either agree or strongly agree that customer education is a valued output of wine tourism



Overall Attitudes Toward Wine Tourism

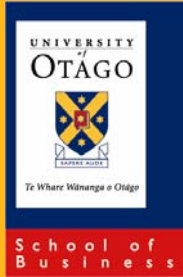
- Overall, attitudes towards wine tourism are more positive in 2003





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

