



WINE TOURISM

Wine tourism encompasses a wide range of experiences built around tourist visitation to wineries and wine regions. This includes wine tasting, enjoyment of wine and food, the exploration of regional environments and the experience of a range of cultural, nature based and lifestyle activities.

Queensland's wine industry started in Stanthorpe on the Granite Belt and then expanded into the South Burnett. More recently, there has been an influx of new wineries opening in areas immediately north and south of Brisbane, such as Mt Cotton Estate and the Gold and Sunshine Coast hinterlands, all within an hour of south-east Queensland's major population centres. These are much more accessible and are helping to fuel growth in Wine Tourism.

In 2002, Tourism Queensland conducted a review of current research to gain a better understanding of the Wine Tourism market. Specific objectives of conducting the review were to:

- Develop a market profile of the Wine Tourism sector in Queensland;
- Provide information on what people are looking for in a Wine Tourism experience;
- Identify any product gaps; and
- Identify core issues that confront both the operation and development of tourism businesses targeting the Wine Tourism market

Market Insight

- Wine tourism is one of Queensland's fastest growing tourism sectors.
- Some \$60 million has been directly invested in Queensland's wine industry over the past five years, and the number of cellar door outlets (retail outlet for a winery or vineyard) has jumped from 30 to 90.¹
- Most domestic visitors to wineries do so as part of a day trip, short break or weekend away to a region, rather than as a specific trip just to purchase a bottle of wine. They come to a region to experience its character, food, lifestyle, and cultural attractions, to visit friends and relatives, and to unwind and relax.²
- Approximately 490,000 domestic travellers visited a winery on their last short trip within Australia (less than 3 nights) and 766,000 visited a winery on their last long trip (3 or more nights).³
- Approximately 38,000 travellers who had their last short trip in Queensland visited a winery on that trip. Approximately 86,000 travellers who visited Queensland on their last long trip visited a winery on that trip.³
- Wine tourism has experienced good growth in the domestic market over recent years. Approximately 5.3% of short trip travellers visited a winery on their last short trip within Australia in the 12 months ending September 2001, up from 2.5% in the corresponding period of the year before. Approximately 8.1% of long trip travellers visited a winery on their last long trip, up from 4.0% in the corresponding period of the year before.⁴
- In 1999, around 425,000 international visitors to Australia visited a winery at some time during their stay in Australia. This represents around 11 percent of all international visitors to Australia.⁵
- International visitors from Europe, the United Kingdom, the United States of America and Canada are more likely than other international visitors to visit a winery while in Australia.⁶
- International visitors who visit a winery whilst in Australia tend to spend longer in Australia⁶ and have a higher average expenditure per trip⁸ than international visitors who do not visit a winery whilst in Australia.
- Apart from buying Australian wines, international Wine Tourism visitors also buy wine merchandise and souvenirs like local cookery books, pottery and aprons.⁸

Please note that most information pertaining to type of experience sought, activities, accommodation and length of experience pertains to Australian travellers only. Little research is currently available on this for the international market.

Type of Experience Sought

Most visitors to wineries do so as part of a day trip, short break or weekend away rather than simply to purchase a bottle of wine. They come to a region to experience its character, food, lifestyle, and cultural attractions, to visit friends and relatives, and increasingly to unwind and relax. A desire to have fun and escape the stresses of the city can often be involved. Something as simple as a change of scenery and a chance for romance also play a role for many.²

Activities

Whilst at the winery, visitors generally wish to:

- Have a good time (entertainment)
- Learn a bit more about wine generally and the particular winery and wine region
- Taste the wines and perhaps buy some.⁹

Travellers who are participating in wine tourism as part of their holiday experience are more likely than other travellers to undertake the following types of activity while on their trip/holiday:

- Experiencing restaurants, international foods and wine
- Meeting and mixing with other people
- Visiting art galleries
- Visiting historical places
- Visiting parks (including National Parks) and gardens.⁴

International visitors who travel to wineries have a higher interest than other visitors in cultural activities (museums, art galleries, wine festivals), particularly those reflecting local customs and heritage.¹⁰

Facilities¹¹

To enhance the tourism experience for wine tourists, it is recommended that a cellar door (retail outlet for a winery or vineyard) pay special attention to the following facilities and infrastructure.

INFRASTRUCTURE REQUIREMENTS	DETAILS
Signage	Signs at the front gate set the tone - the style of the sign, the information on it (such as opening hours), all create a first impression.
Car Park	Availability of parking is important. It is also important that visitors do not experience confusion about where to park.
Landscaping	The style, maintenance and look of the landscaping help to create a good first impression.
Attention to Outdoor Areas	Outside facilities, such as places for people to linger on a terrace, a place for picnics, and especially children's play areas are facilities to be considered. Many wine tourists have children who get bored easily – if they have somewhere safe to play outside, the parents will have more time to taste the wines, relax and buy.

INFRASTRUCTURE REQUIREMENTS	DETAILS
Indoor-outdoor Connections and Relationships	Both visual and physical, such as are achieved through astute structural and design linkages (doorways, windows with a scenic outlook, etc) should be explored to further enhance the overall feel and visual/physical flow of the place.
Interior Ambiance	Aim to creating an inviting atmosphere upon entry to the cellar door – include design elements and features that feed a variety of the visitor's senses.
Walls	Wall space can be used to educate the visitor on the wines in a subtle and interesting way, such as history of the vineyard – old photos if it is a winery with significant history and heritage.
Wine Information	Information on grape varieties, picking time, how the wine is made, how the climate influences the flavour.
Promoting the Best of the Wider Region	Information on display of the local region is another idea for making the cellar door a total experience.

Accommodation Preferences⁴

Winery visitors on both long and short trips have a preference for staying in bed and breakfast accommodation.

Travel Party¹²

Research indicates that most wine tourists are couples, with a majority of these couples being older travellers (retirees).

Wine travellers visiting the Southern Downs and adjacent regions throughout the winter of 1998 fall into the following travel party categories:

TRAVEL PARTY	TOTAL VISITORS %	PASSING VISITORS %	WEEKEND VISITORS %	WEEKDAY VISITORS %
Alone	5.4	9.5	0.0	3.1
Couple	70.3	82.8	50.8	65.6
Family with children	4.2	2.6	5.1	6.3
Group of friends	13.4	2.6	35.6	12.5
Relatives	5.9	2.6	6.8	10.9
Other	0.8	0.0	1.7	1.6

Mode of Transport⁴

Winery visitors on both long and short trips tend to use their own car/4WD or a hire car/4WD for transport.

Information Sources⁴

Winery visitors are more likely to be heavy users of newspaper, magazines and the Internet than the average traveller.

Demographic Profile⁴

Compared to ALL **short trip** travellers, those travellers who visited a winery on their last **short trip** are more likely to:

DEMOGRAPHIC	PROFILE
Drinking habits	Have drunk wine in the last 4 weeks (84.4%)
Education	Have a diploma or degree education (40.7%)
Income	Earn \$70,000 or more per annum (16.3%)
Occupation	Be semi-professionally employed (12.3%)
Life-cycle	Belong to a young couples household life-cycle (10.9%)

Compared to ALL **long trip** travellers, those travellers who visited a winery on their last **long trip** are more likely to:

DEMOGRAPHIC	PROFILE
Drinking habits	Agree with the statement "I drink more wine than I used to" (54%) and have drunk wine in the last 4 weeks (77.4%).
Age	Be aged 50+ (44.6%)
Education	Have a diploma or degree (36.9%)
Occupation	Be employed as a manager (12.8%)
Life-cycle	Belong to the young couples household life-cycle (10.9%)

The following four groups, categorised by Roy Morgan Research, outline a selection of demographics and attitudes of Australian wine tourists.¹⁰

CATEGORY	% OF NATIONAL POPULATION	% OF WINE TOURISTS	PROFILE
Visible Achievers	About 15% of the population	Over one in four wine tourists (25.8%)	Wealth creators of Australia; seek quality; respond to clever and unusual advertising; skeptical of claims or offers.
Socially Aware	10% of national population	20% of wine tourists	Usually tertiary educated; experiential tourists; high socio-economic group; pursue stimulating lifestyle regardless of price.
Traditional Family Life	18% of the population	18% of wine tourists	Over 50 years old; empty nesters; mostly retired middle Australia; cautious of new things.
Something Better	9% of the population	Currently only 6.3% of wine tourists	Career driven; upwardly mobile younger couples; both earn good incomes; spend and borrow to fund their lifestyles.

Categories of Australian Wine Tourists¹⁰

Australian Wine Tourists have been separated into three categories, depending on their motivations to visit a winery and their expectations of the experience.

Accidental or Curious Wine Tourists need to feel comfortable at a cellar door (a retail outlet for a winery or vineyard), not intimidated. They need to be educated about wine in an entertaining and informal way.

Interested Wine Tourists need to find wines and information that they would not get at their local liquor shop back home. They want to discover something new to show their friends.

Dedicated Wine Tourists want even more information than Interested Wine Tourists. They also want the opportunity to develop their palate further, to be recognised as knowledgeable and to try/buy the latest or rarest wines.

Barriers

- In the past, economic benefits of tourism have often been captured by tourism operators and other non-wine businesses while wineries bear the costs of providing the visitor experience.
- The principal production areas are not located in Queensland but in the States of New South Wales, Victoria and South Australia. South Australia is undoubtedly Australia's premier wine tourism destination being home to approximately 321 wineries, with 80 percent of these located within an hour and a half's drive of the city. South Australia has over 200 cellar door outlets, compared to only 90 cellar door outlets in Queensland.⁹

Opportunities¹³

- Wine tourism is one of Queensland's fastest growing tourism sectors.
- Some \$60 million has been directly invested in Queensland's wine industry over the past five years, and the number of cellar door outlets (retail outlet for a winery or vineyard) has jumped from 30 to 90.¹
- Significant opportunities exist for increasing domestic Wine Tourism as a result of population growth in prime wine consuming age groups, growth in the dining out market, growth in the quest for more individualised beverage experiences and tourism growth in general.
- Queensland's wine industry started in Stanthorpe on the Granite Belt and then expanded into the South Burnett. More recently, there has been an influx of new wineries opening in areas immediately north and south of Brisbane, such as Mt Cotton Estate and the Gold and Sunshine Coast hinterlands, all within an hour of south-east Queensland's major population centres. These are much more accessible and are helping to fuel growth in wine tourism.¹⁴
- The Wine Industry's Vision 2025 emphasises the development of new markets both domestically and overseas. Towards this end, there will be a focus on increasing Australian per capita consumption from 18.3 litres per head to 22 litres per head, establishing optimum penetration of existing wine markets in Europe and North America, and establishing new markets in Asia. There is a potential for increased awareness of and desire for Australian wines to be generated as a result of these initiatives, which could lead to higher interest in participation in Wine Tourism amongst both domestic and international travellers.
- Wine-grape growing and wine making are carried out in each of the six States and two mainland Territories of Australia. Potential exists for increasing wine tourism in Queensland through collaborating with wine tourism operators in other parts of Australia.
- For small wineries, cellar door sales can be more cost effective than wholesale/retail distribution.
- Wine Tourism can assist with creating brand awareness and loyalty, along with immediate cash flow.

Marketing Tools

- Wine producers can expand their sales and marketing efforts through cellar door activities, such as winery tours and product tastings.
- Given that most travellers who participate in wine tourism are using a car for transport, consideration should be given to the quality and type of signage at the front gate. The style of the sign and the information on it (such as opening hours) all create a first impression and could assist in enticing a "drive-past" tourist to stop at a winery.
- Wine producers should consider working closely with local tourist information centres to promote both the region and the operation and product.

Other Considerations²

- For new and emerging wine regions, it is important to take an inventory of the elements of the local tourism industry. The visit to a winery is just one of the many experiences the visitor will have in their stay in a wine region. Just as important will be:
 - Accommodation
 - Dining experiences, including cafes, takeaways, coffee

- Hospitality of operators and locals
- Variety, quality and authenticity of attractions and activities
- Ease of getting around – signage and roads – and ease of finding information and maps
- Availability and provision of trusted, reliable advice on all of the above.

It is necessary to find out which accommodation places, restaurants and attractions are likely to meet the needs of the winery visitors.

- Given that Wine Tourism usually occurs within the context of a visit to a region that encompasses a range of activities, wine tourism operators may need to consider the following to assist with the future growth in the Australian wine tourism industry:
 - Developing partnerships with like-minded operators
 - Working closely with the local tourist information centre to promote both the region and the operation and product
 - Identifying complementary operators whose products and services can enhance the visitor experience.

¹ Queensland Department of State Development

² Providing a Total Visitor Experience, Tourism New South Wales Fact Sheet, 2000.

³ Roy Morgan Research Holiday Tracking Study, December 2001.

⁴ Roy Morgan Research Tourism and Travel Market Insight, Wine and Tourism, March 2002.

⁵ International Visitor Survey, BTR, 1999.

⁶ International Visitor Survey, BTR, 1997.

⁸ A profile of International Visitors to Australian Wineries, Tourism Research Report, Journal of the Bureau of Tourism Research, Lee Mei Foo, Vol 1 No 1 1999.

⁹ Wine Tourism in South Australia, South Australian Tourism Commission, 2001.

¹⁰ Understanding Your Tourism Market, Tourism New South Wales Fact Sheet, 2000.

¹¹ Creating Appeal: Visitor Friendly Cellar Door, Tourism New South Wales Fact Sheet, 2000.

¹² The Southern Downs Visitor Survey: research Findings, Nick Parfitt, October 1998.

¹³ Australian Wine Online Strategy 2025, www.winetitles.com.au - March 2002.

¹⁴ Tourism Fuels Queensland's Burgeoning Wine Industry, www.tq.com.au/tqnews/issue07/2features/f02.htm - March 2002.

Further Information

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