

**FOOD AND
WINE
TOURISM
IN AUSTRALIA
2006**

snapshot



Tourism Australia

Definition

A winery visitor is defined as a domestic or international visitor who visits at least one winery during their trip in Australia. A food visitor is defined as a domestic or international traveller who eats at a commercial food establishment during their trip in Australia.

It should be noted that additional questions regarding winery visits were included in the 2006 June and September quarters in the National Visitor Survey and in the 2006 June quarter in the International Visitor Survey.

What are the trends in wine tourism?

Between 2000 and 2006 the number of domestic and international winery visitors increased as did the proportion of total visitors going to wineries (Table 1). During this period, an average annual increase was recorded for international visitors (8%), domestic overnight visitors (6%) and day visitors (5%). Wine tourism has out performed the average annual growth for all visitor types.

Who are winery visitors?

Over the 2006 June and September quarters, 1.9 million domestic overnight visitors visited a winery. Almost half of these visitors (47%) only visited 1 winery, while 21% visited 4 or more wineries. There were also 1.6 million domestic day visitors to wineries with over half visiting 1 winery (56%) and over a quarter visiting 3 or more wineries (27%).

During the 2006 June quarter, 182,000 international visitors visited a winery in Australia. Of these visitors, 35% had visited wineries on a previous visit to Australia. The top two countries of origin for winery visitors were the UK (17%) and New Zealand (12%).

How much do they spend?

During their trip, 69% of domestic overnight visitors and 61% of domestic day visitors purchased wine at the wineries. In the 2006 June and September quarters, they spent \$335 million on purchasing wine, with domestic overnight visitors spending on average \$160 per visitor and domestic day visitors on average \$131 per visitor (Table 3). Using this data to

Table 1 Visitors to wineries 2000–2006

Calendar Year	Domestic			International				
	Visitors '000	Overnight Nights '000	Share Per cent	Visitors '000	Day Share Per cent	Visitors '000	Nights '000	Share Per cent
2000	1 854	9 974	2.5	1 756	1.1	437	22 861	9.6
2001	1 938	11 890	2.6	1 608	1.1	480	23 135	10.7
2002	2 059	11 232	2.7	1 935	1.4	486	24 509	10.9
2003	2 283	13 271	3.1	2 051	1.5	524	24 844	12.0
2004	2 369	13 112	3.2	1 680	1.3	579	29 469	12.1
2005	2 146	11 431	3.1	1 963	1.5	666	30 116	13.2
2006	2 589	14 482	3.5	2 340	1.7	696	34 085	13.6
Average Annual Growth								
Winery Visitors	6%			5%		8%		
All Visitors	0%			-3%		2%		

estimate annual expenditure would result in approximately \$666 million being spent on wine in 2006*.

Over half of the international visitors (51%) purchased wine at wineries, spending a total of \$7.9 million in the 2006 June quarter. On average international visitors spent \$92 per person, with 38% spending between \$21 and \$50, and 29% spending between \$51 and \$120 (Table 3). Visitors from the UK accounted for the highest proportion of expenditure (18%). Using this data to estimate annual expenditure would result in approximately \$39 million being spent on wine in 2006*.

Table 3 Expenditure on wine at wineries

Amount spent	Overnight	Day	International
	Per cent of visitors		
\$1 to \$50	33	39	51
\$51 to \$120	28	33	29
\$121 +	39	28	20

Where do they go?

New South Wales (NSW) was the most popular winery destination for domestic overnight and international visitors while Victoria (VIC) had the largest number of domestic day visitors (Figure 1). A higher proportion of all visitors to Western

Australia (WA) and South Australia (SA) visited wineries compared to other States/Territories.

What do they do?

The most popular activities for domestic visitors at the wineries, after wine tasting and purchasing wine, was sampling or purchasing food such as cheeses, jams, sauces or olives. Undertaking a guided tour of a winery was popular among international visitors (29%) (Table 2).

Table 2 Top 4 Activities undertaken at wineries

Domestic	Overnight	Day
	Per cent	Per cent
Undertake wine tasting	79	70
Purchase wine	69	61
Sample food at winery such as cheeses, jams, sauces or olives	32	27
Purchase food at winery such as cheeses, jams, sauces or olive	27	23
International	Per cent	
Sample food and/or wine	81	
Purchase wine	51	
Guided tour of winery	29	
Ate a meal	27	

Figure 1 Proportion of visitors to wineries by State



Where are they eating?

During the June quarter 2006, 67% of international visitors were aware that Australia produced gourmet food and wine. New Zealand visitors (87%) were most aware of Australia’s gourmet food and wine while visitors from China (42%), Korea (49%) and Japan (49%) did not have a very good awareness. Of the international visitors 67% would recommend Australia’s gourmet food to their family and friends.

Almost all international visitors ate at a restaurant during their trip (97%). International visitors preferred to eat in cafes (59%) and takeaway restaurants (56%) however they were more inclined to dine in specialty restaurants (52%) compared to domestic visitors (17%). Walking or driving past (53%) and personal recommendations (47%) were the most common information sources used to choose a restaurant by international visitors.

The majority of domestic overnight visitors (75%) ate at a restaurant on their trip. These visitors preferred informal options such as eating at takeaway, fast food or snack bars (26%), cafes or coffee shops (25%)

and casual restaurants (24%) (Table 4). Personal recommendations (34%) and previous experience (22%) were also information sources used by domestic overnight visitors when choosing a restaurant.

Table 4 Types of restaurants

	Domestic Overnight Per cent	International Per cent
Takeaway, fast food or snack bar	26	56
Pub, bar and grill	22	41
Café, coffee shop	25	59
Buffet restaurant	5	27
Themed restaurant, dinner and show, dinner cruise	1	12
Specialty restaurant (eg. Chinese, vegan)	17	52
Casual restaurant	24	51
Fine dining restaurant	13	24
Other	3	1
Did not eat at restaurant	25	3

Where did they source information?

Personal recommendation was the most popular source of information about wineries for international (45%), domestic overnight (33%), and domestic day (29%) visitors. Previous visits were also popular information sources for domestic overnight (21%) and domestic day (19%) visitors. Package tours provided information to 19% of international winery visitors.

How many cellar door facilities are there?

There were 1,565 wineries in Australia with cellar door facilities at April 2007 (Table 5). VIC had the largest number of wineries with cellar door facilities whereas QLD had the largest proportion of wineries with cellar doors.

Table 5 Cellar door facilities by State/ Territory, April 2007

State/ Territory	Cellar door facilities	Share of all wineries
NSW/ ACT	343	79
VIC	489	78
QLD	98	90
SA	313	56
WA	259	78
TAS	63	78
Total	1 565	73

DATA SOURCES

Table 5: Winetitles wine industry database 2007
Tourism Research Australia National Visitor Survey (NVS) and International Visitor Survey (IVS), 2000-2006 (unpublished data). All figures refer to persons over the age of 15 years.

KEY:

* Annual estimates were modelled on a seasonal index.

KEY FINDINGS

- Visitors to wineries increased strongly between 2000 and 2006, with average annual increases for international (8%), domestic overnight (6%) and day visitors (5%).
- Of the domestic visitors who purchased wine at wineries, overnight visitors spent on average \$160 per person and day visitors spent on average \$131 per person, with approximately \$666 million being spent on wine in 2006*.
- Of the international visitors who purchased wine at wineries, the spend per person on average was \$92, with approximately \$39 million being spent on wine in 2006*.
- The UK (17%) and New Zealand (12%) were the top two international markets.
- The majority of international visitors (97%) ate at a restaurant during their trip compared to domestic overnight visitors (75%).

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