Wine Tourism in the Auckland Region:

an analysis of the relationship between the wine and tourism industries as well as the significance of wine tourism as a tourist attraction

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Abstract

Originally designed for a conservative domestic market, devoid of wine drinking traditions, wine production in New Zealand, by taking advantage of the recent trend in the liberalisation of legislation, has now expanded to the extent that other markets including wine tourism are becoming increasingly crucial if further enlargement of the industry is to continue.

Within New Zealand, as with many countries, tourism both international and domestic, has become a major contributor towards economic prosperity. Overtaking the more conventional hedonistic tourism pursuits of past years, special interest or activity based tourism is now gaining momentum both within New Zealand and overseas. The availability of suitable attractions and activities are vital if this burgeoning industry is to further expand in the future. Particularly this is so in the Auckland region which is struggling to maintain and increase visitation levels by both overseas and domestic tourists.

Wine tourism entails more than just visiting wineries and vineyards. Rather it is the summation of a number of unique experiences - the "winescape". This includes ambience, landscape, surrounding social environment, regional culture, cuisine, local wine styles, and a variety of unique leisure activities that makes wine tourism popular with a growing number of travellers. Wine tourism can be considered as a form of consumer behaviour, based not only on the appeal of wine and wine regions but also involving development, marketing and promotional strategies for both the wine industry and market-place destination in which wineries and wine-related experiences are the pre-dominant attractions.

Internationally wine tourism is expanding rapidly throughout most wine producing regions in the world, although New Zealand including Auckland, is further behind in both recognition and extent than other comparable New World countries. In the case of Auckland, the growth and nature of wine tourism varies considerably as between the five sub-regions constituting the

Auckland Wine Region. To further investigate wine tourism generally and more specifically in the Auckland Wine Region, a wine tourism market model has been constructed in order to consider the demand, supply and destinational aspects of the wine tourism market-place.

Within the context of the Auckland Wine Region, the research was designed by using the model, to explain the various components of wine tourism and their interrelationships. At a more general level it also seeks to consider the positioning of wine tourism within the ambit of the tourism attractions of the greater Auckland area.

Acknowledgments

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Chapter one: Introduction

Traditions of grape-growing and wine production have existed for millennia. New Zealand was the last country in the world, with a suitable climate, to plant *Vitis vinifera* (the wine grape). It is almost two hundred years since these first plantings and during much of this time the country's wine industry progressed only slowly, hampered initially by laws, regulations, taxation and the conservative traditions of a non-wine drinking society. Although some notable wines were produced in those pioneering years, it was only after the removal of the earlier protectionist policies during the last three decades that the wine industry progressed more rapidly. Increasing levels of competing imports encouraged the industry to produce wine that is often unique but still competitively priced.

Governmental laws and regulations have played a major part in shaping the structure of the wine industry in New Zealand. These laws and regulations have historically covered the four areas of liquor licensing, wine-making, taxation and import controls/tariff protection. New Zealand has ten major wine producing regions of which the Auckland Wine Region contains the five distinct wine sub-regions of Henderson/Henderson Valley, South Auckland, Kumeu/Huapai/Waimauku, Matakana/Mahurangi and Waiheke Island. The development and current state of the wine industry in both Auckland and New Zealand is considered in Chapter 2, while Chapter 8 reviews the role that governmental laws, regulations and commissions of enquiry have played in shaping the wine industry and its organisation to the present time.

Following international trends, tourism is now a major industry in New Zealand. More recently, at both the domestic and international levels, special interest tourism has been growing rapidly. This type of tourism is segmented, customised, flexible and activity based, reflecting the life-style, aspirations and interests of its participants. Auckland attracts large numbers of domestic and international tourists even though only a few major attractions are based in the region. The City is often perceived as a gateway or stop-over for those engaged in New Zealand-wide tours. More recently researchers have recognised that clusters of similar attractions draw tourists to particular regions. The wine sub-regions adjacent to Auckland constitute clusters of activity-based tourism attractions, for both the travelling public and day-trippers resident within the Auckland Region. Chapter 3 analyses the current state of the New Zealand tourism industry and the place of wine tourism within the context of the industry generally.

Wine tourism can be considered as a form of consumer behaviour, based not only on the appeal of wine and wine regions but also involving development, marketing and promotional strategies for both the wine industry and market-place destination in which wineries and wine-related experiences are the pre-dominant attractions. Wine tourism involves more than just visiting wineries and vineyards. Rather it is the summation of a number of unique experiences - the "winescape". This includes ambience, landscape, surrounding social environment, regional culture, cuisine, local wine styles, and a variety of unique leisure activities that makes wine tourism popular with a growing number of travellers. Chapter 4 reviews the concept of wine tourism, its nature, extent and organisational forms, both internationally and locally.

It has generally been recognised that there is no unified theory of tourism. Rather, the theoretical basis of tourism consists of a combination of concepts derived from a number of disciplines. Geography, sociology, economics anthropology, psychology, marketing and management science are usually regarded as the disciplines to be included. Because of this, much of the research to date has been fragmentary. The approach employed by various researchers has depended not only on the topic being researched, but also on the background of the researcher. Tourism research is generally divided into one of three subject groupings. The first of these relates to environmental, economic, social and cultural impacts. The second is concerned with specific sectors of the tourist industry, centering upon the marketing and management science aspects of those segments. The final grouping relates to both the interactions and the spatial development aspects of tourism.

A number of difficulties in tourism research have been analysed in the literature. The diverseness of the industry, its unorganised nature, the insufficiency of credible measures, its geographical basis and its perceived future importance, have long been recognised as contributing factors to the problems in tourism research. These difficulties have manifested themselves by leading to a narrow focus with excessive reliance upon a case study approach, which fails to recognise the interdisciplinary nature of tourism itself, or to provide an in-depth analysis of the problem being researched.

Much of the wine tourism research to date has related to particular aspects only of the wine tourism market. These include case studies of particular wineries, regional descriptions of wine regions, wine marketing utilising tourism, concept descriptions/comparisons, producer surveys, consumer surveys and inter-industry relationship descriptions and surveys.

In the case of Auckland the growth and nature of wine tourism varies considerably as between the five sub-regions constituting the Auckland Wine Region. To further investigate wine tourism generally and more specifically in the Auckland Wine Region it is necessary to consider in detail all aspects of the wine tourism market model (see Figure 4.0 of Chapter 4). The demand or consumer side of the model is analysed in Chapter 5, while Chapter 6 looks at the supply side of the model from the point of view of the individual winery participant and finally Chapter 7 scrutinises the wine tourism destinational market-place.

A focus group was used initially to design the research. A market analysis approach was adopted in order to examine in depth the components of the wine tourism market-place of the Auckland region. Both the demand and supply aspects of the model were researched. A quantitative approach was chosen for both surveys. Site surveys of randomly sampled consumers and structured interviews for producers were considered to be the most appropriate choices. Chapter 9 examines past research, the methodologies used in this current research and the approach taken during its development and implementation.

The results of the consumer and producer surveys are examined in Chapter 10 and Chapter 11 respectively with results being compared and contrasted wherever possible to other similar studies. Chapter 12 discusses the results of the research and examines issues of validity and reliability. Conclusions of this thesis are presented in Chapter 13 together with suggestions of possible future research.

Chapter two: Historical Background

2.0 Introduction

Wine producing traditions dating back hundreds or thousands of years exist amongst wine producing countries. Although the development of the New Zealand wine industry, with its unique characteristics, is in an early adolescent state, vineyard development in the Auckland region by comparison is largely an infant - a twentieth century phenomenon.

The initial orientation of the wine industry in New Zealand was strongly influenced by the supplying of a domestic market without wine drinking traditions. From the outset, growth although steady was somewhat slow. It is only during the last three decades that the industry has expanded rapidly, leading to major changes in its structure.

The Auckland Wine Region, originally centred around the vineyards to the north-west of the city, was pioneered by immigrants from the Dalmatian coast of Croatia. It produces significant quantities of wine not only from locally grown grapes but also from grapes and musts transported in from other wine regions. Auckland, with five distinct wine sub-regions, is home not only to the country's major wine producing companies but also to numerous small family-owned wineries.

In order to understand the present state of the wine industry in New Zealand and its relationship with tourism, one needs to consider the historical development of both viticulture and wine-making, together with the relationship of the industry, to the conservative traditions of New Zealand society.

2.1 Earliest Beginnings

Archaeologists claim that evidence exists to support the contention that wine-making existed ten thousand years ago. The first recorded mention of grape wine occurs in writings from Mesopotamia in 2000 BC. Although wine existed in both ancient Egypt and early China, it was in Greece that the real art of wine making was initially developed. The Greeks by Homer's, time around 1000 BC, had completely mastered both viticulture and vinification (Sutcliffe, 1981). As Warner Allen stated in *A History of Wine,*

> ..armed with the two indispensable requisites for the making of fine wine, the pruning knife and an air-tight receptacle for storage the Homeric hero was able to enjoy great vintage wines such as the world was not to know in the 1500 years between the Fall of the Roman Empire till 1800.
>
> (Allen, 1961 p.47).

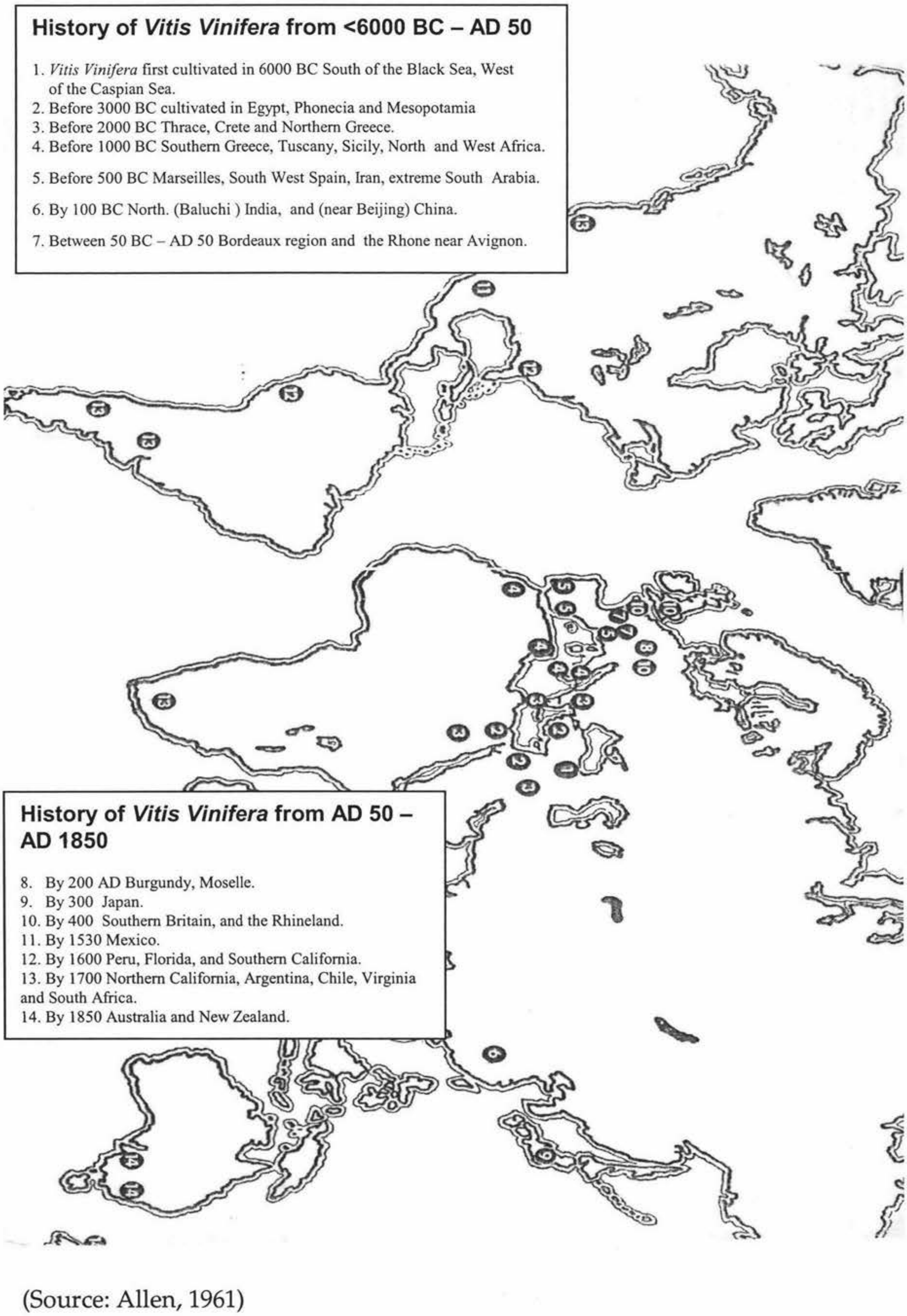
Man, a long time ago mastered the art of wine-making. Technological progress has since standardised the product, making it more readily and more easily available, yet the basic conditions for making good wine have not altered over thousands of years. Given the skill of the wine-maker the three basic conditions are favorable soil, the right climate and quality grapes (Faith, 1989).

Although the origin of *Vitis vinifera,* the true wine grapevine, has long since been lost to antiquity it is certain that it originated somewhere in the Northern Hemisphere, south of the Black Sea and spreading then to the Tigris/Euphrates area. Because it is a temperate, deciduous fruit *Vitis vinifera* was unable to cross the tropics remaining in the northern hemisphere, (see Figure 2.0) until transplanted by man to the Southern Hemisphere (see Appendix B) (University of Pennsylvania, 2003; McGovern *et al.*, 1995; Hyams, 1965).

2.2 Wine and the New World

In the New World, the history of wine is analogous to the history of missionaries. If not accompanying the colonisers, the missionaries zealously followed closely behind them. Wine was essential not only to celebrate the Sacraments but also as a beverage for those doing God's work to relax with. Obtaining cuttings from Spain, Cortes supplied these to the Jesuits as they

Figure 2.0 Cultivation of Vitis vinifera Around the World



(Source: Allen, 1961)

moved northwards from Mexico to California. The Franciscans succeeded the Jesuits, establishing many of the Mission vineyards still to be found in the western states of the United States today (Vine *et al.*, 2002; Swaminathan, 1995; Thompson, 1973). Similarly in South Africa, firstly the Calvinists and then later the French Huguenots bedded the first grapevines into the soil of the African continent (Hyams, 1965). Gradually as was the case in Babylon, Egypt and Greece, or much later in France and Germany, viticulture expanded beyond its ecclesiastical origins becoming part of the estates of the wealthy. Eventually it expanded to commercial organisations providing wine firstly for the better-off and more recently as a drink for all (Sutcliffe, 1981).

2.3 Establishment of Grape Vines in Oceania

The history of viticulture in Australia is largely unrelated to missionary fervor. In 1788 Governor Phillip of the New South Wales colony, an avid wine connoisseur, brought with him vine cuttings procured both in Rio de Janeiro and the Cape Colony. Encouraged by the many voluminous wine drinkers of commercial London, the Governor using two French prisoners of war, who knew nothing of viticulture, attempted to establish Australia's first vineyard. This produced few grapes and even less wine.

The first successful Australian vineyard, established in Parramatta by the explorer Gregory Blaxland, dispatched an award winning shipment of wine back to England in 1822. A later Governor of New South Wales, John McArthur, returning from Europe with a shipment of French vine cuttings, eventually managed to produce commercial quantities of wine in 1827 (Robinson, 1997a). However the father of viticulture in both Australia and New Zealand is generally regarded as James Busby.

Busby, of Scottish origin, had a lifetime interest in viticulture and having travelled extensively throughout the wine producing regions of Europe, imported into Australia, cuttings of 570 different varieties of grapes (Busby, 1833). As well as plantings in the Sydney Botanical Gardens, Busby also established a vineyard in the Hunter River Valley. This property later became part of the Lindeman family vineyard holdings (Simon, 1966). In 1832 Busby left Australia for New Zealand to become that country's first resident British agent.

Within the imagined Utopia of the English, wine has always flowed. Dreamed of as an idyllic consequence of life in a far off green land, embraced by sandy beaches and overlooked by blue sunny skies New Zealand embodied those imaginings of its earliest settlers.

2.4 Historical Development of Wine-making in New Zealand

A time-line of the historical development of both vineyards and wineries in New Zealand from the initial plantings of Busby in 1819 to the mergers and industry rationalisations of the present day is included in Appendix L. Sections 8.1, 8.2, 8.3 and 8.4 of Chapter 8 outline the historical background of laws and regulations with regard to liquor licencing, wine-making, taxation policy and tariff protection and import controls.

2.5 Viticulturists and Wine-makers of the Auckland Region

In 1882 Assid Abraham Corban arrived in New Zealand. His family had been making wine in Lebanon for more than three hundred years. Having travelled around New Zealand looking for suitable land to establish a vineyard, Corban eventually selected a two hectare block of poor (kauri) gum land in Henderson, north west of Auckland. *Mt Lebanon* originally ridiculed by others as a site for vine growing, expanded rapidly in both acreage and wine production (New Zealand Herald, 2002c; Scott, 1977; Corban, 1960). Although no longer owned by the family whose name it still proudly bears, Corban's Wines in the vintage of 1997 produced almost 32% of the country's wine.

To the present day, by far the greatest influence on wine-making in the Auckland region, has been exerted by immigrants and their descendants from Dalmatia on the Adriatic coast of the former Yugoslavia (Croatia) (Moran, 1958). During the last two decades of the nineteenth century these new-comers, known somewhat disparagingly as "Austrians" by other settlers, provided the labour for work-gangs, extracting kauri gum from the poor soils north of Auckland. As a result of their industriousness over-production occurred and the Government of the day enacted legislation excluding "aliens" from working the gum-lands. Faced with both dwindling kauri gum reserves as well as such discriminatory governmental enactments many of these Dalmatian families settled on small land holdings north of Auckland. Undeterred by the hard physical work involved, while possessing traditions of both viticulture and wine-making, many of these families planted grape vines on their newly acquired land, both around and to the north of the then small settlement of Henderson north-west of Auckland (Talmont, 1996; Scott, 1964; Moran, 1958).

Yukich, Yelas (originally Jelich), Selak, Babich, Vuletic, Brajkovich, Fredatovich, Soljan, Ozich, Sapich, Ivicevich, Fistonich, Vitasovich and many other names of Dalmatian origin - these are the names synonymous with wine-making in the Auckland region. Pleasant Valley Wines best exemplifies these family traditions. Originally planted in 1902 by Stipan Jelich, not only is this property the oldest surviving Dalmatian vineyard in Henderson, but also it is has the distinction of being the longest continuously owned one-family vineyard in New Zealand (Brimer, 1993).

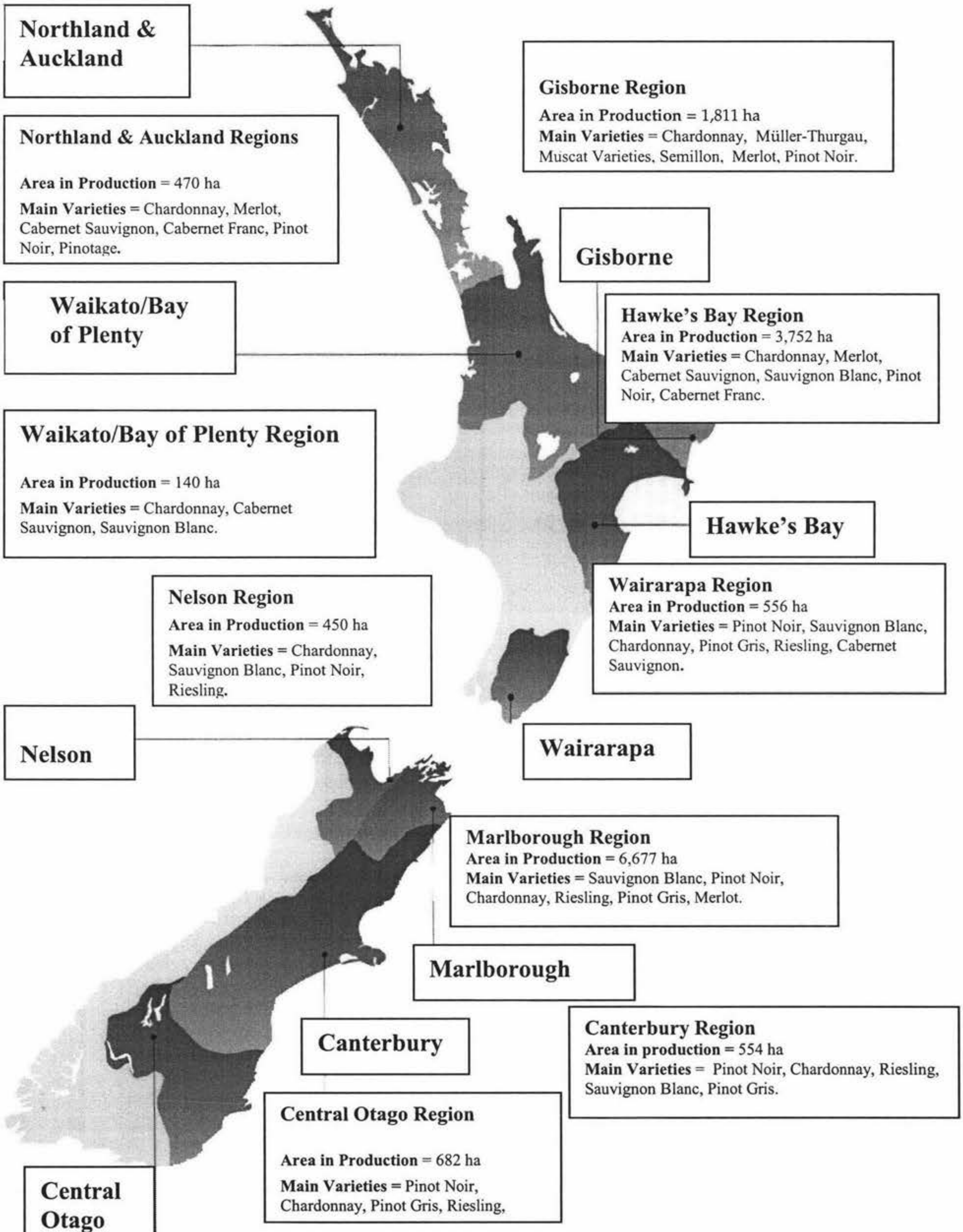
The colossus of the New Zealand wine industry can trace its humble origins to the foot-hills of the Waitakere ranges north-west of Auckland. Montana Wines by 1999 was already producing 40% of New Zealand's wine but with its more recent merger with Corbans increased its merged-group market share to a massive 59% (Roberston, personal communication). Montana Wines was founded by Ivan Yukich in 1934. The original family vineyard was still only ten hectares in size by the end of the nineteen-fifties. With the assistance of external financing and eventually a public share float, Montana, during the next decade, expanded rapidly. Additional vineyards were planted, while associated wineries were constructed firstly in Gisborne and then later in Marlborough. Frank Yukich, son of the founder, foresaw the changing taste of the New Zealand public away from sherry towards white table wines.

Directing the company's expansion towards the mass market of slightly sweet white table wines, Montana soon surpassed Corbans as the country's largest wine-maker. Following a disagreement with the international company of Seagrams, providers of much of the additional finance required for this rapid expansion, Yukich departed from the company in 1974. Montana became a subsidiary of the then New Zealand publicly listed company, Corporate Investments Limited (Hewitson, 1985) which later, having disposed of its other business interests, changed its name to that of its famous subsidiary. By 1998 although the four largest wineries (Montana, Corbans, Villa Maria, Nobilo) produced over 80% of the country's wine production (Saunders, 1998) and almost 90% of the country's export wine (New Zealand Herald, 1998a) it is the rapid increase in the numbers of small wineries that has characterised the last decade.

2.6 Current Characteristics of New Zealand's Wine industry

By world standards New Zealand in total both produces and consumes a minuscule amount of wine, (see Table A.2, A.3, A.4 of Appendix A). The country's per capita consumption of wine, has increased over the years to an initial peak of 17.3 litres in 1994 and in 1998 ranked nineteenth in the world at 16.5 litres (see Table A.2 of Appendix A). In 2003 (June year) consumption per capita has again peaked at 19.7 litres (see Table A.1 of Appendix A). New Zealand is divided into ten recognised wine growing regions (see Figure 2.1 and Table A.5 of Appendix A) (Courtney *et al.*, 2003). These regions are all contained within the ten to twenty degree annual isotherms levels favourable to *Vitis vinifera* (approximately thirty to fifty degrees latitude north/south) and are all classified as Region 1 (less than 2500 degree days on the Californian heat summation index (classic-cool) in the world wide degree-days classification system), that is used to classify wine-growing areas (Courtney *et al.*, 2003; de Blij, 1983, Hurnard, 1982). As a result of New Zealand's maritime influence, latitude is not comparable to climates of the northern hemisphere; Hawkes Bay is roughly comparable to the climate of Bordeaux, although in latitude terms Canterbury is identical. The areas in the world where grapes are grown and climates are similar to New Zealand's are Bordeaux, Alsace, Burgundy, the

Figure 2.1 Map of New Zealand's Wine Regions



Statistics all as at 30 June 2003

Varieties in order of ha in production

(Source: New Zealand Winegrowers, 2003)

Loire, and Champagne in France, the Mosel and Rheingard in Germany, Sonoma in the USA and Coonawarra in Australia (Cooper, 1997; George,1996).

It is now recognised that different regions within New Zealand are more suitable for certain varieties of grapes and in recent years this has been reflected in the distribution of the planted areas (see Table A.15 of Appendix A). Additionally there has also been a marked trend towards the planting of classic grapes (see Table A.10 of Appendix A) and a reduction in the areas planted for the production of bulk wines (for cask production), which are now largely imported (see Tables A.8, A.13, A.14 of Appendix A). An occasional paper produced in 1993 (Wine Institute of New Zealand Inc.,1993) predicted for the year 2000:

- Export sales of NZ$100M.
- A decline in wine stocks to 40 million litres (60 million litres less than the international standard (of stocks to annual production of 1.5).
- New Zealand per capita consumption of 17.5 litres of which 14.93 litres would be of locally produced wine and 2.57 litres of imported wine.
- Total production of 72.5 million litres of which 20 million litres would be exported and 52.5 million litres would be consumed locally.
- An increase in vineyard producing area of 2,000 ha to around 6,800 ha.

This paper, designed as a lobbying attempt to reduce excise duty, expressed considerable concern as to the industry's ability to achieve these predictions unless its profitability was increased.

In its Annual Report of 2003 (June year covering 2002 - 2003) New Zealand Winegrowers reported that:

- Export sales of 27.114 million litres were valued at NZ$281.839 M with New Zealand obtaining the highest average price of all countries exporting to the crucial UK market of GB £5.80 (see Figure M.5, Figure M.6 of Appendix M; Tables A.16, A.18, A.19 of Appendix A) (Watson, personal communication).
- Domestic sales of New Zealand made wine of 34.4 million litres while imports amounted to 44.373 million litres (see Figure M.3, Figure M.4 of Appendix M; Tables A.1, A.7, A.12 of Appendix A).

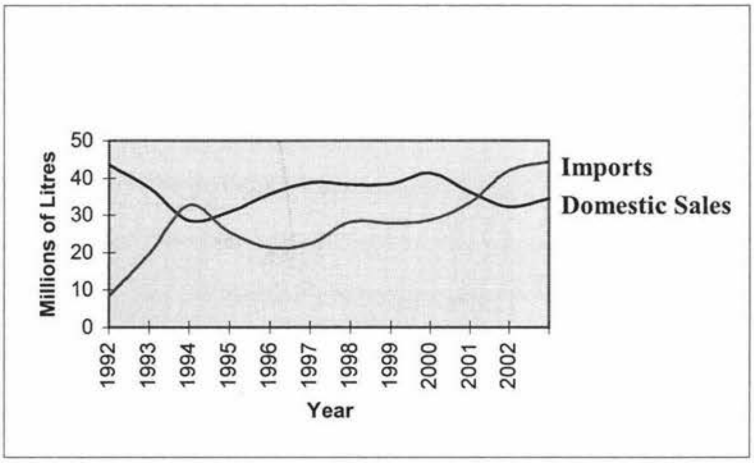
- A producing vineyard area of 15,479 hectares and a vintage of 76, 400 tonnes of grapes with 55 million litres of wine being produced (see Figure M.0, Figure M.1 of Appendix M; Tables A.1, A.8, A.9, A.10, A.11 of Appendix A).
- Wine stocks of 118.695 million litres; a production to stocks ratio of 1.93 (see Table A.7 of Appendix A).
- Per capita consumption of all wine of 19.7 litres of which 11.1 litres was imported and only 8.6 litres was local (see Table A.1 of Appendix A).
- Wineries numbering 421 (see Figure M.2 of Appendix M; Table A.1 of Appendix A).

Although many of the targets set earlier were easily met by the year 2000. It has, however, become apparent that because of increasing levels of imported wines (see Figure M.4 of Appendix M) together with a falling trend in the domestic consumption of locally produced wines (see Figure 2.2; Table A.32 of Appendix A), that in spite of rising export volumes in relationship to total wine sales (see Figure M.5, Figure M.7, Figure M.8, Figure M.9 of Appendix M; Tables A.7, A.18, A.19 of Appendix A) stocks held have tended to rise. Consequently some vintages in the future may prove difficult to sell for some wineries (Wood, personal communication).

The potential problem of the huge vintage of 2002 (The Evening Post, 2002) (see Table A.1 of Appendix A) was solved in the short term by the smaller vintage of 2003, of less than two-thirds by volume of the previous year. This has even led to the necessity of importing musts from overseas for blending purposes (New Zealand Herald, 2003c). In the immediate future, the financial position of the industry is also expected to be further affected by domestic plantings made but not yet producing, (New Zealand Herald, 2003d) (see Table A.1 of Appendix A), a harvest almost double that of the bumper 2002 vintage of 200,000 tonnes being expected by 2006 (New Zealand Herald, 2003e), as well as increasing competition from Australia, South Africa, the United States and Chile both locally and abroad (McKenzie, personal communication; Saunders, 1998). Clearly additional marketing strategies, such as wine tourism, must be employed if the industry is to further expand in the future.

In an article forecasting the future trends of the wine industry by 2010 published in the *New Zealand Herald*, Terry Dunleavy, inaugural Executive Officer of the New Zealand Wine Institute, predicted export sales valued at NZ$600M representing two-thirds of industry sales by volume, with a planted area of 16,000 hectares (Dunleavy, 1999).

Figure 2.2 Wine Imports Versus Domestic Sales of New Zealand Wine



(Source: New Zealand WineGrowers (adapted), 2003; Statistics New Zealand (adapted), 2003b)

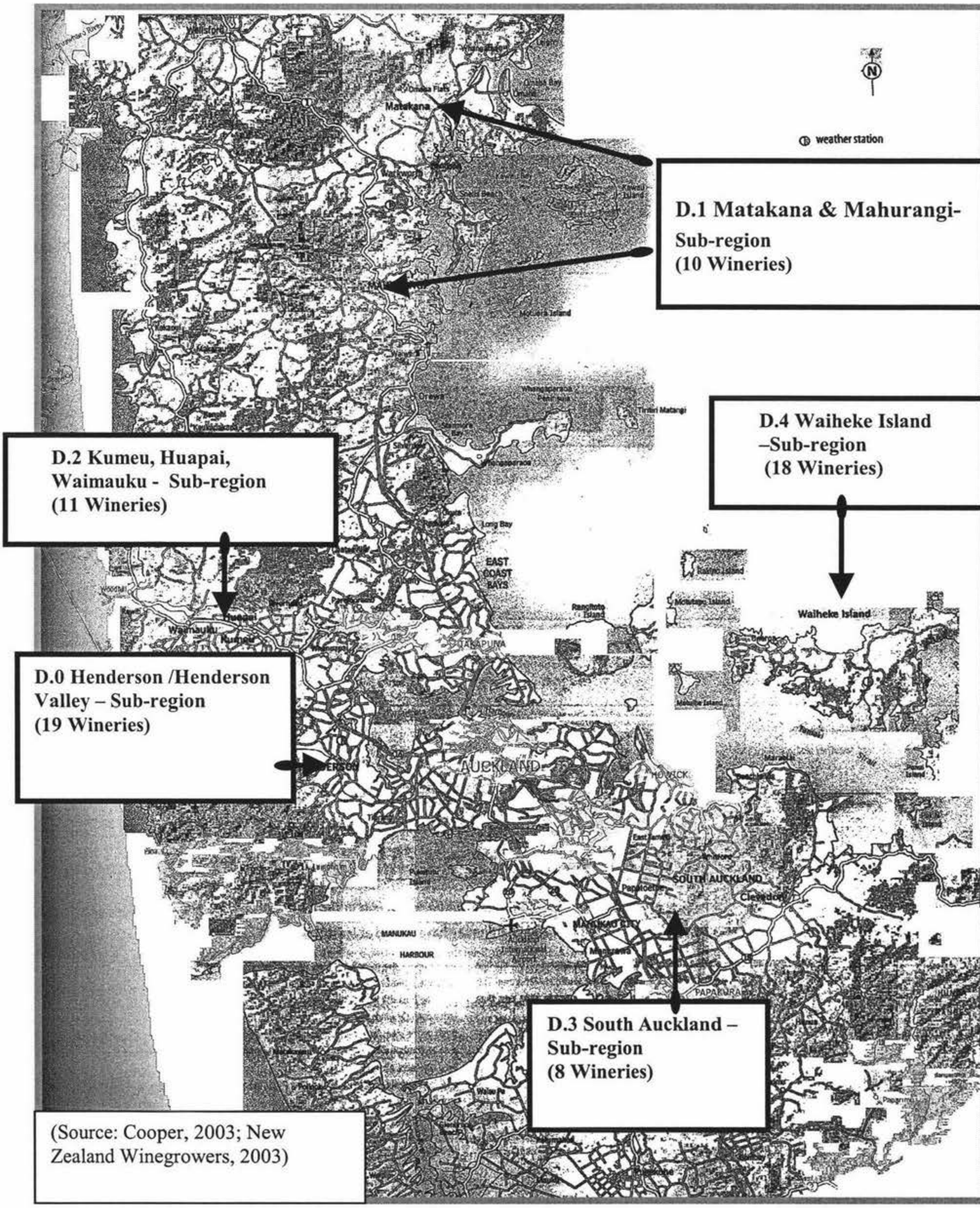
2.7 Current Characteristics of the Auckland Wine Region

The Auckland wine region includes the sub-region of Matakana/Mahurangi (sometimes included in the Northland wine region), the Henderson /Henderson Valley sub region, the Kumeu/Huapai/Waimauku sub-region, the South Auckland sub-region and the Waiheke sub-region (see Figure 2.3).

Currently there are 89 wine-makers licenses issued for the Auckland wine region, from a total of 421 at the national level (see Table A.5 of Appendix A). In 1990 the comparative number of wine-makers licenses on issue were 56 and 131 respectively. Although there are presently 66 wineries operating in the Auckland region (see Appendix D) until recently the number of producing hectares of grapes had been in constant decline from 327 in 1990 to 191 in 1997. This trend has now been reversed and current plantings amounted to 470 ha in 2002 (see Table A.9 of Appendix A). The national total area estimated to be

Figure 2.3 Map of Auckland's Wine Sub-Regions

(Reference Number Refers to Appendix D)



(Source: Cooper, 2003; New Zealand Winegrowers, 2003) planted in grapes by the year 2005 is around 18,000 of which approximately 500 is expected to be planted in the Auckland Wine Region (see Table A.9 of Appendix A). All three of the Category 3 members (each producing more than two million litres annually) of New Zealand WineGrowers (Montana, Villa Maria and Nobilo) originated from Auckland and although they each retain their respective head-office in the region they have expanded from their original local plantings in varying degrees to the wine regions of Gisborne, Hawkes Bay and Marlborough (Perry *et al.*, 1992). There have been a number of reasons for this:

- ***Climate*** - Auckland generally has a humid climate which promotes fungal diseases on grapes. Additionally, with the exception of a coastal strip along the east coast from Matakana to Waiheke Island, excessive rainfall during the ripening season detracts from grape quality.
- ***Land cost*** - Land is not readily available at a reasonable cost. Most of the suitable land in the commuter belt, is generally hilly, is incorrectly zoned and in recent years has become far too expensive to be economically viable.
- ***Soil*** - The soil is mainly of type "Waitemata Complex" consisting of heavy clays with peaty patches often with underlying hard-pan but too overly fertile for quality grapes. During the winter months the soil, without adequate drainage becomes water-logged.
- ***Wind*** - As Auckland is on a narrow isthmus the strong, almost continuous, westerly prevailing winds can prove damaging to vines.
- ***Birds*** - Birds tend to congregate around the periphery of large cities, where there are ample year-round food supplies. However netting is now frequently used to rectify this problem.

(Halliday, 1998; Saunders, 1998; Halliday, 1997; Cooper, 1996; George, 1996)

In spite of the retention of corporate headquarters in Auckland for the larger wine-related companies, additional production facilities have been established in other regions, adjacent to their own viticultural properties together with those of contracted grape growers. For many of the medium sized and smaller producers of the Auckland wine region, in addition to locally produced fruit, further grapes or musts are transported from other regions to their Auckland production facilities. In one sense Auckland, with 25% of New Zealand's wine companies but with less than 2% of the nation's grape crop, has been likened to a large grape funnel (Saunders, 1998). Wine tourism in the Auckland wine region benefits from being adjacent to New Zealand's most populated city, its largest international airport and the availability in many wineries of wines produced from musts sourced from throughout the country.

2.8 Summary

A knowledge of the historical evolution over the ages of both oenology and viticulture is advantageous when considering the current status of wine production in New Zealand. Busby, for his original vineyard plantings and Bragato, for his viticultural and oenology expertise, are both generally regarded as the "fathers" of the wine industry in New Zealand.

Blessed with a climate favourable for grape growing, the industry's pioneers in New Zealand, eventually determined those regions most suitable for growing particular grape varieties. In Auckland, viticulture and wine-making was initially developed to the north-west of the city, mainly by immigrants from the Dalmatian coast of Croatia. The country's dominant wine producers were largely founded by such immigrant families in Auckland, where their head offices are still located. These major wine producers have now expanded throughout the country to other regions in order to take advantage of differing soils, climate and lower land prices. Although only a limited quantity of grapes are currently grown in the region, Auckland is still a significant producer of wine made from both locally grown grapes, as well as grapes and musts transported in from outside of the region. The Auckland Wine Region contains five distinct sub-regions each with distinctive characteristics with regard to wineries and wine tourism visitation.

Governmental laws and regulations have played a major part in the history of the wine industry. Such laws and regulations have historically covered the four broad areas of liquor licencing, wine-making/labelling standards, taxation and import controls/tariff levels.

By world standards, New Zealand's production and consumption of wine is minuscule. Although commencing from a low base, both vineyard area and wine production has expanded rapidly in all wine regions over the last decade. Per capita consumption of wine in New Zealand appears now to have reached a plateau and increasingly the importation of cheap wine, mainly from Australia, is used to satisfy the domestic market. This has occurred to the extent that domestic sales of locally produced wine, are now considerably less than that of imports. Accordingly local producers have, from necessity, exported at favourable prices, increasingly larger volumes of wine especially to Europe.

Originally designed for a conservative domestic market, devoid of wine drinking traditions, wine production, by taking advantage of the recent trend in the liberalisation of legislation, has now expanded to the extent that other markets including both wine tourism and additional exports are becoming increasingly crucial if further enlargement of the industry is to continue.

Increasing levels of competing imports has stimulated the industry over the years to currently produce wine that is often geographically unique, of high quality and yet still competitively priced. New Zealand's increasing levels of tourism, both domestically and internationally furnish an opportunity for enterprising wine producers to expose their own specially crafted product to a travelling public. This is especially true in Auckland - the major gateway to the country.

Chapter three: The New Zealand Tourism Industry

3.0 Introduction

The tourism product is a multi-dimensional one centred around its people component while comprised of the additional elements of transportation, attractions/activities, and amenities (including accommodation and domestic transportation) that are derived from the sectors constituting the industry (Page, 1999; Pearce, 1995; Pearce, 1989).

During the last three decades researchers have observed the emergence and rapid growth of a new style of tourism (Poon, 1993; MacCannell, 1989). This "new tourism", as opposed to the older more passive style of conventional tourism, is segmented, customised, flexible and often activity based reflecting the life-style, aspirations and interests of its participants. A particular activity may take place in a specific geographical setting such as an urban or rural place or a combination of a number of such places.

While the lack of adequate amenities may deter tourists from visiting a particular area, it is the presence of clusters of similar attractions that draw tourists to particular regions (Swarbrooke, 2002; Tyler, 2001; Page, 1995). Within the Auckland region, activity based tourism, is following a national trend apparent throughout New Zealand. This in turn is a reflection of the same high growth sector of the ever-expanding international tourism industry.

3.1 International Tourism

By all measures world tourism, both international and domestic, is a huge industry. Its direct contribution to the World Gross Domestic Product is estimated to be approximately four per cent and provides direct employment for 78 million people. Globally, international tourist arrivals estimated at 692 million in 2001, or in excess of ten per cent of the world's population, were expected by the year 2010 to increase to in excess of 1 billion. This forecast by the World Tourism Organisation (WTO) further projects international tourist arrivals of over 1 1/2 billion by the year 2020. In spite of the "Asian Crisis" of 1997, the growth rates in the Asia/Pacific region are estimated to be between six and seven percent over the period 1990 to 2020, compared to an estimated world growth rate of around four per cent (see Table A.24, A.25 of Appendix A) (World Tourism Organisation, 1999; World Tourism Organisation, 1995). The Asia Pacific region, in recent years the fastest growing tourist region in the world, is expected to continue this growth pattern (see Table A.24 of Appendix A) (Hall, 1997; Opperman, 1997).

Growth in international tourism receipts have been equally spectacular. From US$472 B in 2001, such receipts although difficult to forecast, are projected to grow to US$1 T by the year 2010 (see Table A.26 of Appendix A) (World Tourism Organisation, 2002; World Tourism Organisation, 2001; Witt, 2000). Expenditure per tourist varies considerably as between country of origin of the tourist (see Table A.27 of Appendix A). This table illustrates the relativity between the market shares of numbers departing particular countries to the market share of their expenditure and is an indicator of the origins of "high value" tourists.

The terrorist attacks within the United States on September 11, 2001 threw the world's tourism industry into complete disarray with negative growth occurring in that year of -0.6% (see Table A.24 of Appendix A). The increased activity of like-minded terrorist groups (Example: the Bali bombing) together with struggling Western economies coupled with more recent fears of a pandemic from the Severe Acute Respiratory Syndrome (SARS) has clouded the short term outlook for growth in the world's tourism industry (Collier, 2002).

3.2 Tourism in New Zealand

Within New Zealand tourism is regarded as a high profile economic activity characterised until the 1998 year by high growth levels (see Table A.20 of Appendix A). During that year the downturn in the economies of South East Asia and Japan disrupted this normal growth pattern. During the latter part of that year signs emerged showing that growth was once again returning, as arrivals from other countries began to compensate for the marked decline in visitor numbers from the worst affected regions of the world. For the year ended December 2002 total visitor arrivals to New Zealand exceeded two million for the first time (Tourism New Zealand, 2003). The long-term growth rate for visitors to New Zealand over the last twenty years is between eight and nine per cent (see Appendix A.20 of Appendix A). This is approximately twice the global average growth rate.

Of the three segments classified according to purpose of visit, holiday tourists, visiting friends and relatives and business visitors, the first and last of these have traditionally shown the greatest long-term growth trends, although a recent worrying trend has seen a deterioration in the holiday segment of the market (see Table A.28 of Appendix A) (Collier, 2002).

Within economic classifications of the employment structure of countries, tourism is not generally regarded as a unified or distinct sector. Accordingly economic benefits have to be estimated from the various disparate sectors constituting the industry. The recent advent of the New Zealand Treasury Tourism Satellite Accounts has rationalised this process. Gross Domestic Product (GDP) impact, foreign exchange earnings and employment levels are generally regarded as constituting the overall economic benefits of tourism.

For the year ended March 31 2002 overseas tourists to New Zealand spent NZ$14.6 B million dollars, an increase of around three and a half per cent from the previous year. This is the gross amount of foreign exchange earnings for the country which includes overseas receipts to Air New Zealand. The New

Zealand Tourism Satellite accounts show that net contribution to GDP (after deducting Goods and Services Tax (GST), tourist related imports and intermediate inputs) approximated NZ$5 B (Statistics New Zealand, 2002d; Statistics New Zealand, 2001). Amounting directly to around five per cent of GDP, international tourism is a significant industry providing employment, at varying skill levels, directly for over 163,000 New Zealanders (Collier, 2002). The New Zealand Institute of Economic Research (NZIER), using multiplier analysis, has estimated that the multiplier effect of international tourism in New Zealand results in an increase of two dollars fifty-six cents in household income for every additional tourist dollar spent. Additionally, two and one third jobs are created as a downstream effect of every direct job created in the tourist industry (NZIER, 1992).

Surveys made during the 1980's, although somewhat limited in scope, suggested that domestic tourism had an economic impact approximately equivalent to that of international tourism during that time (Hall and Kearsley, 2001). The domestic 1999 year travel survey (Forsyte Research, 2000) showed that expenditure of almost NZ$7 B was made by domestic tourists including daily recreational travellers. This comprised 50 million person nights and 44 million day trips. Although increasing absolutely, the growth in domestic tourism has in recent years been declining in relative importance to that of international tourism (see Table A.23 of Appendix A).

In a survey conducted by McDermott Fairgray, the Tourism Research Council of New Zealand (2001), has produced a comprehensive forecast of New Zealand's international tourism to the year 2007 (see Table A.29 of Appendix A). The positive effects of the burgeoning tourist industry, both international and domestic, provides persuasive reasons for the continued development of tourism towards its maximum potential.

3.3 Tourism in the Auckland Region

The Auckland Region comprises the four cities of Auckland, North Shore, Waitakere and Manukau as well as the adjacent districts of Papakura, Franklin and Rodney. The number of overseas visitors to the Auckland Region has risen from approximately 750,000 in 1990 to approximately 1,250,000 in 2000 accounting for 34% of the country's room nights (see Table A.21 of Appendix A). Currently the average length of stay by international tourists to the region is approximately eight days. In spite of this, Auckland's share of the total visitor spend has fallen from over 35% in 1990 to 26% in the year 1996 (New Zealand Tourism Board (NZTB), 1998). Average visitor expenditure has increased about NZ$17 per day nationally but Auckland had experienced only marginal increases during this period (NZTB, 1998). The Auckland City Council has estimated that international tourism accounts for approximately 11% of the region's jobs (including down-stream jobs) and almost 6% of Auckland's regional domestic product (Auckland City Council, 1998). Conducted by McDermott Fairgray the Tourism Research Council of New Zealand (2001), has produced a comprehensive forecast of Auckland's international tourism to the year 2007 (see Table A.30 of Appendix A).

Auckland has traditionally been regarded as a gateway for visitors to the country (Pearce, 1992). Given this status as well as the considerable growth in the conference market in the city, the proportionate fall in visitor expenditure within the region is surprising and perhaps reflective of Auckland's tardiness in developing additional revenue earning attractions in comparison with other regions within the country. The construction earlier of the Sky City Casino complex as well as the more recent re-development of the viaduct basin area, which includes the America's Cup Village, have been developments which may assist to redress the decline in visitor spending within the Auckland region.

Over the years little research has been conducted on domestic tourism. Comprehensive data available for the 1989/1990 year has been recently updated for the 1999/2000 year (Forsyte Research, 2000). During the ten years from 1990 to 2000 Auckland has suffered a loss in market share of national domestic visitor room nights of approximately three per cent (see Table A.22 of Appendix A).

3.4 Special Interest Tourism

Because wine tourism is centred around a particular activity it may be regarded as an element of the special interest category of the "new tourism" (Poon, 1993). Accordingly the development of wine tourism in New Zealand reflects the growth of special interest tourism within the country. Read, as early as 1980 noted that special interest tourism would be,

> ..a prime force in the expansion of tourism,.. [and would] ..dominate the industry in the next decade and be responsible for an unprecedented rise in visitor satisfaction... (Read, 1980, p.195).

Special interest tourism can be said to occur when the traveller's motivation and decision making are primarily determined by a special interest activity. Normally this would imply active or experiential tourism. Special interest tourists tend to approximate the psychographic "allocentric" classification of Plog (1974). He considered that such tourists enjoyed travelling independently, were involved in cultural exploration, were often in above average income groups and tended to seek adventurous experiences while on holiday. The activities preferred by this category is based upon life's unfamiliar and novel experiences. Special interest tourism reflects the segmentation and specialisation of the tourist and leisure industry which has been a feature of the last two decades.

Although the importance of travel costs has long been recognised as a significant factor in the travel decision-making process (Smith, 1995; Clawson and Knetsch, 1966), the value for money concept as a reflection of the lifestyle of the tourist, was being viewed by many writers in the late 1980's and early 1990's as becoming a major determinant in travel decisions (Hall and Weiler, 1992; Weiler and Hall, 1992; Krippendorf, 1987). This concept differs from that of the cheapness or bargain basement prices of mass tourism. Rather it is founded upon a perception by the tourist of life-enrichment, enabling him/her to participate in pursuits of specific personal interest. Available travel funds are spent on such activities rather than on accommodation or transportation.

This gradual substitution of special interest tourism for travel based upon pure hedonism was viewed by a number of writers as a growing trend (Lickorish, 1987; Krippendorf, 1987; Martin and Mason, 1987). An explanation for such changes focuses on both occurring and projected social-demographic changes. These consist of a rising percentage of single adults, an expansion in the number of two-income families, an older age of first marriage participants and increasing numbers of childless couples. Such changes were seen as leading to substantial variations in tourism types, needs and patterns (Martin and Mason, 1987).

Examples of special interest tourism abound, each associated with related motivations and differing perceptions of the tourist. The concept of urban tourism (Page and Hall, 2003; Page, 1995; Laws, 1993) includes special interest activities such as museums, art galleries, heritage, arts and community festivals, performing arts and sports. While the concept of rural tourism includes the special interest activities of farm and ranch stays, health tourism and wine/food tourism (Hall, and Sharples *et al.*, 2000; Page, and Getz, 1997a; Page, and Getz, 1997b), the notion of natural tourism embraces adventure travel, eco-tourism and nature-based tourism. Many special interest tourist activities are difficult to categorise as they often overlap. To illustrate this overlap, educational tourism for example may be either nature-based or culture-based while both ethnic and adventure tourism may contain the same basic activity.

Although the volume of special interest tourism is unclear, estimates vary from two to three per cent (World Travel Organisation, 1985) to a more recent estimate of fifteen per cent (Collier, 2002). The literature suggests that the market for special interest tourism has been expanding throughout the last twenty years (Collier, 2002; Hall 1991; Hall, 1989; Read, 1980). This expansion is reflected in the increasing number of pages devoted to special interest tourism within particular regions in tourist guide books such as *Foders* and *Lonely Planet,* as well as an increasing number of publications exclusively devoted to particular special interest tourism activities such as archaeology, river rafting, scuba diving, bird watching, motor rallying, surfing and wine trails.

3.5 Industrial Tourism

Industrial tourism is a form of special interest tourism. Defined as workplace tourism, the concept originated in Britain. Observing both the operational aspects of a particular industry as well as being present in the working environment of others has long held a particular fascination for visitors. Both Urry (1990) and MacCannell (1990) in their classic books on tourism, have noted the apparent paradox of "workers" endeavouring to separate themselves from the traditional bonds of work by engaging in tourist activities, but doing so by heeding the working activities of others .

Generally based upon consumer items familiar to all, factory visitations have been encouraged by companies as diverse as Cadbury's, Ford Motors and Baxter Soups in the UK, as well as Dominion Breweries, Fisher & Paykel, and Edmonds in New Zealand. In order to meet the intellectual demands of curious tourists, visitor attractions in work places have in recent years grown rapidly both in number and diversity in most western countries (Skolnik, 1992; Jackson, 1989).

As well as the visitor, industrial tourism also benefits the hosting company. Depending upon policy, the company benefits by the creation of additional revenue from entry charges, factory shop sales and catering receipts. More importantly however are the indirect benefits of:

- enhancing company image and improving public confidence in both the production process and product quality;
- encouraging customer loyalty to brand names;
- promoting general product awareness especially to international visitors
- and improving staff morale and corporate pride.

(Johnson, 1989; Menzies, 1989)

Scottish malt whisky distilleries have for a number of years, pursued a policy of work place tourism. Commencing in 1969 at the Glenfiddich distillery, dedicated visitor centres by 1993 existed in almost one in three of the malt distilleries (twenty-seven in all) throughout Scotland, attracting between them over one million visitors in that year (Somerville, 2001; Cartwright, 2001; The Malt Whisky Trail, 1996; McBoyle, 1994). According to Sommerville (2001) and McBoyle (1994) there are four main reasons for the success of distillery tourism:

- the regional distribution of visitor centres;
- the range of centre facilities;
- the visitor experience
- and the marketing concept of "The Malt Whisky Trail".

While Scotland has traditionally utilised images of unique scenery, wildlife, ancient buildings and friendly people to lure tourists, the distilleries conform with, complement and build upon these representations. In this way distillery attractions have clearly benefited Scottish tourism. Likewise wine tourism, centred around vineyards located in peaceful scenic areas, is a form of industrial tourism in that it includes many of those distinguishing characteristics as outlined above.

3.6 Cultural Tourism

The concept of cultural tourism embodies not only heritage and architecture but also includes a dimension of "lifestyle". This notion, which is often ignored in the literature (Williams and Kelly, 2001; Boyd, 2001; Getz, 1999; Richards, 1996), has as a central theme the idea of "learning" as being a primary distinguishing characteristic of cultural tourism. Richards (1996), concluded that in the European context, that first-time visitors were more likely to visit notable sites while repeat travellers would be attracted by "living culture" or lifestyle experiences.

Of the three basic forms of cultural tourism observed by Munster (1996) and applied to wine tourism by Getz (1999), these are the infrastructure of wineries and wine themed events or facilities, tourism packages featuring the wine destination and winery/vineyard tours.

3.7 Rural Tourism

In spite of its economic and social importance to rural communities little research, apart from case study comparison (Hall and O'Hanlon, 1998; Sweet, 1996), has been conducted in the field of rural tourism. Because of this, few conceptual models and only a limited number of related themes have been developed by researchers in this area. Many writers have found the term "rural" difficult to precisely define. Douglas noted the difficulty of definition.

> Given the diverse nature of rural tourism and rural tourism products, it is not surprising that a single definition of this form of Special Interest Tourism is yet to emerge.
>
> (Douglas *et al.*, 2001, p.167)

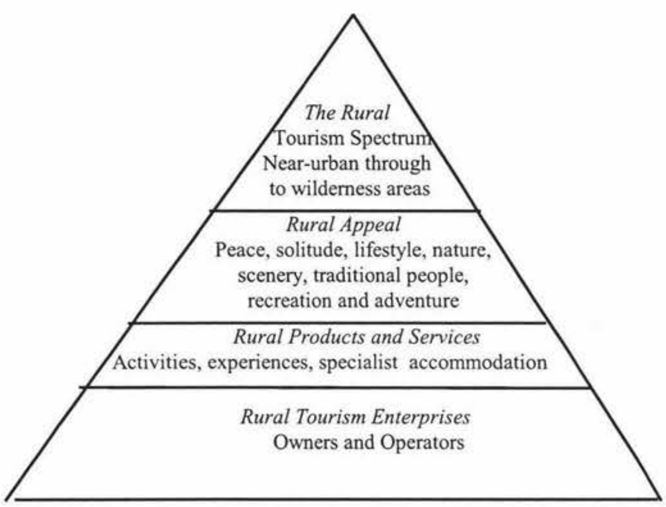
Douglas (2001) considered that current definitions of rural tourism fell into one of the three categories of geographic and demographic definitions, product-related definitions (supply related) or tourist experience-related definitions (demand related).

Initially researchers in rural tourism adopted a sociological approach which was extended by some to include anthropology, economics, planning, geography and management science (Page and Getz, 1997a; Sharpley, 1993; Bouquet and Winter, 1987). Up to the present time little in the way of a unified theory of rural tourism has been developed. For some writers, rural tourism has been seen as a simplistic form of consumption of the countryside by urban dwellers revelling in a form of recreational diffusion from the confines of their normal environment. For those theorists, the increasing level of car ownership amongst the urban population, promoted a fanning out from the cities to rural locations beyond the immediate areas reachable from stops associated with previous transport forms such as the train. This in turn has led to an interleaving of rural tourism with that of its urban counterpart.

While some researchers argued that the quality of "ruralness" was a perception peculiar to the occupants of a particular rural area, others have adopted the view that the specification of the actual physical activities of the rural tourist, such as agri-tourism, farm/ranch stays, adventure tourism, alternative tourism, eco-tourism and wine tourism in an unspoiled, traditional and pastoral environment as sufficient to understand the rural tourism concept (Hall and Page, 2002; Page *et al.*, 2001).

Page and Getz (1997b, p. 192) developed an overall conceptualisation of rural tourism (see Figure 3.0). At the apex of the diagram the broad basis of rural tourism is shown. This broad definition is then analyzed to show the appeal of the rural environment from the point of view of the consumer followed by the actual products of rural tourism, to a consideration of the actual product providers.

Figure 3.0 Conceptualisation of Rural Tourism



(Source: Page and Getz, 1997b, p. 192)

Within the New Zealand context, the New Zealand Rural Tourism Council was established as a national organisation to represent the needs of the rural tourism sector. The mission statement of the Council is:

> To work with broader tourism and rural-related sectors; to increase the awareness of the rural tourism sector in New Zealand and to provide added value services which support and enhance the development of rural tourism businesses.
>
> (New Zealand Rural Tourism Council, 1994, p.3).

3.8 Summary

Within New Zealand, as with many countries, tourism both international and domestic has become a major contributor towards economic prosperity. The availability of suitable attractions and activities are vital if this burgeoning industry is to further expand in the future. Particularly this is so in the

Auckland region which is struggling to maintain and increase visitation levels by both overseas and domestic tourists.

Overtaking the more conventional hedonistic tourism pursuits of past years, special interest or activity based tourism is now gaining momentum both within New Zealand and overseas. Although wine trails have existed for more than a century this activity was not previously seen as a separate tourist attraction. Following the recognition of special interest tourism as a particular concept in the study of the "new tourism", the notion of wine tourism as a researchable subject was recently introduced. Because it is centred around a particular activity, wine tourism can be regarded as a form of special interest tourism, often with a cultural aspect. The workplace setting of both vineyard and winery, normally in a rural environment, suggests that wine tourism contains elements of both industrial and rural tourism.

Chapter four: Wine Tourism

4.0 Introduction

Forms of wine tourism, although unrecognised as such, have existed for centuries. More recently a defined pattern of wine tourism has emerged as an important area of special interest tourism both internationally and within New Zealand. Evolving from an ambience comprising vineyards and wineries, "winescapes" are becoming a central part of many rural environments. As well as producing wine for regional visitors, winery clusters have become attractive tourist destinations in their own right.

Following its acceptance at a theoretical level as a legitimate topic of study, wine tourism research, commencing only in the mid 1990's, although sparse, has more recently become increasingly sophisticated. This is illustrated by the number and extent of academic papers published, as well as the number of international conferences held to further explore its various aspects. Several definitions of wine tourism have now evolved. Most of these are centred around the consumer. Such consideration of wine tourism should not be so constrained, as additionally wine tourism is both a destination planning and marketing strategy for wineries and other businesses clustered amongst them.

Because of the duality of industries involved many theorists consider that to develop a successful wine tourism destination an organisational structure is necessary if a strategic plan is to be implemented. In some countries the wine tourism concept has developed rapidly with differing means being adopted to achieve this. New Zealand's wine regions lag considerably behind the wine tourism successes of their international counterparts, especially in the new world, although evidence exists to show that this gap is now narrowing. This is largely reflected in the Auckland wine region where the extent and nature of wine tourism development varies considerably as between the five wine sub-regions.

4.1 History and Development of Wine Tourism

By the time of the middle ages international wine trading from the producing areas of France began to flourish. The brokers conducting such trade to Britain and the Low Countries were originally non-travelling civil servants. By the seventeenth century they had become private traders and together with the *château* owners formed close business relationships with the wine importing merchants of London, Amsterdam, Copenhagen and Antwerp (Brennan, 1997; Spahni, 1995).

Within the established wine producing countries of Europe planned vineyard and winery visitations by travellers have existed at least since the time of the commencement of the "Grand Tour" concept of the seventeenth century. This practice, institutionalised by the gentry for the purposes of both education and pleasure, included periodic visits to the *châteaux* of Burgundy and Bordeaux, exploration of their attached *vignoble* (vineyard), sampling of any *vin* (wine) on offer, and in Italy similarly with the corresponding *vigneto* and *vino* of Tuscany. These visitations, although not recognisable as wine tourism as such, were normally by invitation of parental relatives, friends or business associates often formed through the flourishing international wine trade (Belfrage, 2003; Hall and Mitchell, 2001; Spahni, 1995).

During the second part of the nineteenth century visitations to the established wine growing areas of France and to a lesser extent to those of Italy became more widespread. There were a number of reasons for this:

- The technological development of railways (replacing stagecoaches) leading to easier access to rural areas.
- The advent of steamships and the development of short sea ferry services to continental Europe from Britain.

- The refinement of the bicycle and the development of the notion of "invigorating" cycling holidays.
- The general acceptance and expansion of Thomas Cook's 1851 concept of itinerary based holidays.
- Social changes in Victorian society leading to the rapid development of a middle class desirous of experimenting with the established pursuits of the wealthy (Example: fine wine drinking).
- Commencing in 1855 the *Appellation d'Origine Controlée* (AOC) system was introduced. These rules, which related the concept of geographic "place" to the production of fine wines, motivated wine drinkers to visit wine regions. (see Section 8.5 of Chapter 8) (Robinson, 1999; de Blij, 1983).

The Rhine has long attracted tourists. Travelling by steamer and stopping at wine villages *en route* these visitors became an important market for German wineries. The Moselle (Mosel - French) valley and its terraced vineyard area has always been one of the most photographed locations in the world. Alsace, a much disputed region between France and Germany, and now on the eastern boundary of France, has long attracted to the *Wienstuben* (wine region) many German visitors who became an important market for the region's wines (Robinson, 1999).

In France the origins of wine tourism can best be considered unintentional. Located on the route from Northern Europe to the sunny coastal areas of the south, the earliest tourists passing through Burgundy and the northern Rhône could not help but notice the vineyards and enticements to a *Dégustation-Vente* (tasting sale). The Loire, situated within easy reach of Paris, has long attracted visitors to wine producers located in the midst of its picturesque châteaux country (Lonely Planet Guide, 2002). In those parts of France where wines of high reputation are certain to be sold, wine tourism was largely resisted by the elite producers. Only in the late 1980's did Bordeaux finally realise its potential for wine tourism. Medôc, arguably the most famous cluster of wine properties in the world, until then lacked a hotel and restaurants suitable for international visitors. Before this the château of Lichine was ridiculed for being the only *classed growth* proprietor open to visitors of the region (Johnson and Robinson, 2001; Lonely Planet Guide Series, 2001). According to Mallon (1996), Choisy (1996) and Desplats (1996) there has always been few wine producer participants in the French tourism sector and wine tourism participation began to increase only during the 1980's as a result of falling consumption and other economic constraints.

Requiring cooperation between a number of wineries and local government, the notion of a wine trail, linking together various vineyards/wineries is twentieth century in its source. Originating in Germany in the 1920's, with a view to promoting tourism, these embody the concept of "place", by relating a specific geographic area to a particular wine style(s). In Rheinhessen-Pfalz the *Deutsches Weintor* (German Wine Gate) was constructed in 1936 as an entrance-way to the original *Weinstraßen* (wine road). Later on the *Weinlehrpfad* (educational wine path) was developed in 1969 as a further marketing tool for German wine (Fodors Travel Destinations, 2002; Hall *et al.*, 2000b).

In modern-day Germany the state of Rheinhessen-Pfalz contains six of Germany's thirteen wine-growing regions. As well as sign-posted wine cycle trails, developed during the early 1990's, the older German Wine Road now spans the length of the Pfalz wine region. The concept of the *Weinstraßen* (wine road) has since spread to almost all wine growing regions in Germany (Fodor's Travel Destinations, 2002; Johnson and Robinson, 2001; Stauder, 1989).

Vineyards and wineries as rural tourism assets have significant potential. De Blij (1983, p. 6) noted that

> ..the enriching vista of viticulture ..gives identity to a region... ..creating an appealing environment that is part of the reason why wine regions the world over attract endless streams of visitors, who come not just to sample the wines.

Although much of Southern Europe is simply too hot and too far from suitable resorts to be feasible, in the new world wine tourism has from the early 1990's developed notably. Outstanding examples include Napa and Sonoma as tourist attractions out of San Francisco, Hunter Valley for visitors and residents of Sydney, upper New York state, the stunningly beautiful vineyards of Stellenbosch and Paarl within easy reach of Capetown and the tourist attracting cities of New Zealand with adjacent vineyard properties especially those of Otago with their stunning views of snow capped peaks (Robinson, 1999). Even within countries with an established tradition of wine production, wine tourism, in its present manifestation, can generally be regarded as a relatively recent phenomenon.

4.2 Definitions, Concepts and Models of Wine Tourism

The term "wine tourism" is gradually becoming an accepted expression, not only within academic circles but also within the wine and tourism industries. Wine tourism can be defined as visitation to vineyards, wineries, wine festivals and wine shows for which grape wine tasting and/or experiencing the attributes of a grape wine region are the prime motivating factors for visitors (Hall, 1996; Macionis, 1996).

The length of time that people spend at a particular destination will determine whether they are regarded as "tourists" (a stay of at least twenty four hours) or "excursionists/day trippers" (a stay of less than twenty four hours) (Collier, 2002). The "wine tourism" definition is generally regarded as including both categories of visitors. Although a rural setting is the common environment for wine tourism, the definition does not preclude an urban location (Example: wine and food festivals (see Section 7.3.3 of Chapter 7) (Hall *et al.*, 2000b).

Arguments have been raised against the restrictiveness of the available motivations included within the definition with regard to "wine tasting" and/ or "experiencing the attributes of a grape wine region". Johnson (1998) suggested that the normally accepted definition of wine tourism (above) seems to imply that all visitors to vineyards/wineries have wine-related motivations. Clearly this could not be the case as such visitors would be expected to differ markedly in both wine knowledge and intensity of interest. Johnson (1998) further pointed out that distinctive qualities of specific wine regions appealing to particular individual visitors may bear no relationship to the consumption of wine. Because of the normal rurality of a wine tourism location Johnson (1998, p. 3) noting the vagueness of the distinction between wine tourism and rural tourism, defined wine tourism as the "visitation to vineyards, wineries, wine festivals and wine shows for the purpose of recreation". Getz (2000, p. 7) noted in his definition contribution that:

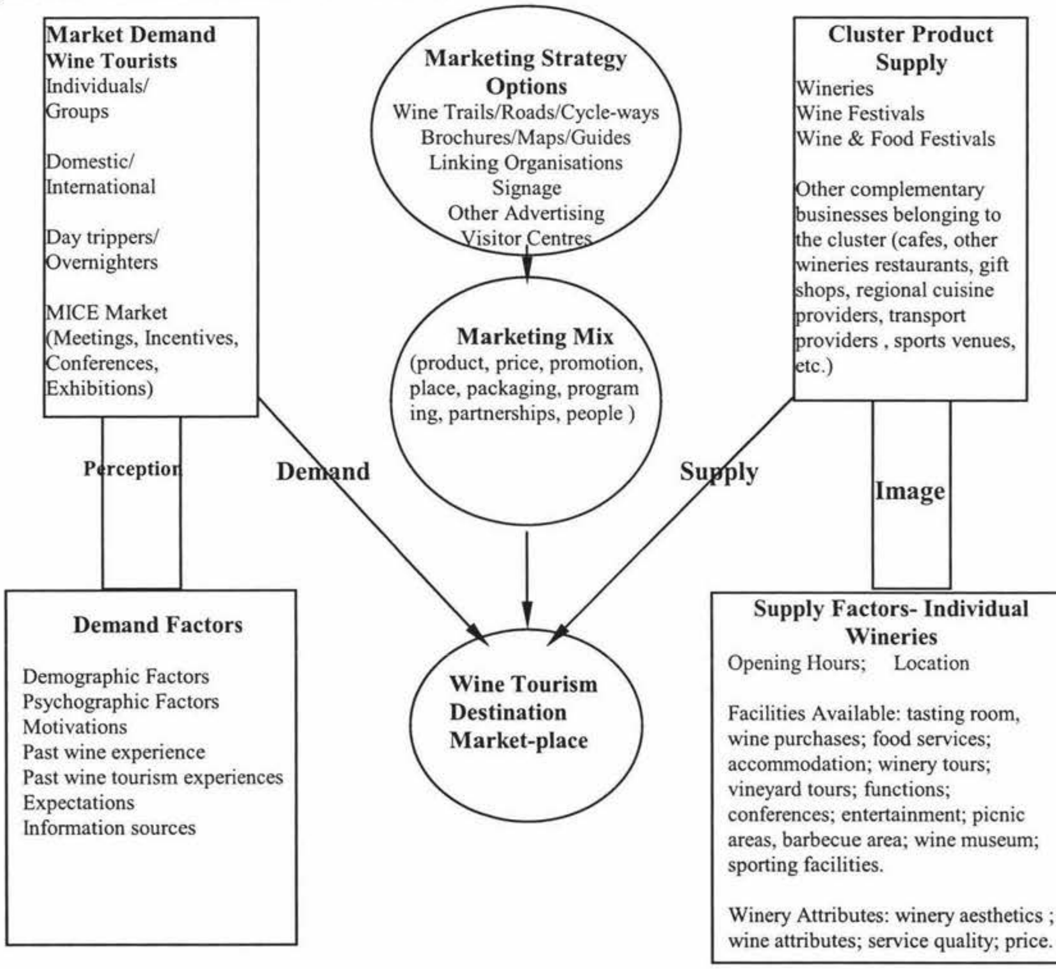
> Wine tourism is travel, related to the appeal of wineries and wine country, a form of niche marketing and destination development, and an opportunity for direct sales and marketing on the part of the wine industry.

All of these definitions are meritorious in that they co-join several of the key elements of wine tourism, namely the visitor, the wine *destination* in its widest possible context where the wine related activity/experience takes place, and the *pull* components either natural or constructed that draw the two together. Although there is some unanimity as to the three key components of wine tourism, questions regarding its scope and nature remain. Examples of these are:

- When does a visitor to a wine region become a wine tourist? Is it prior to leaving home or when they first book a wine tour or when they actually arrive in a wine growing area?
- When does a rural tourist become a wine tourist? How does it relate to tourists to a region without plans to visit a winery, but who happen to stumble across one in the course of their travels?
- Another discussion point is the actual location of wine *events*. Should wine shows and wine museums, offering wine-related experiences, in urban areas be regarded as part of the wine tourism definition? Or is a wine growing region located within a rural area critical? Consider the National Wine Centre of Australia located in Adelaide (Wine Industry Journal, 2001) or even more extremely the Vinopolis wine attraction in London which invites international visitors to have a *virtual* wine experience of wine growing areas (Vinopolis, 2003; Hall and Mitchell, 2001; Getz, 2000).

The wine tourism definition of Hall (1996) and Macionis (1996) above, has now been broadened beyond the vineyard/winery level to the extent of including all tourism within a wine region that is influenced by its particular location (Cambourne *et al.*, 2000). More recently Mitchell *et al.* (in progress) cited in Mitchell *et al.*, (2000) which in turn followed on from Peters (1997) and argued for the concept of a "winescape", this being a specific wine producing location that because of its particular attributes (vineyards, wine-making, wine production/storage) is attractive to visitors, quite independently of the wine that is made there.

Figure 4.0 Wine Tourism Market Model



Macionis (1996) proposed a model of wine tourism based around a special interest in wine, motivated by the wine region destination and/or the activity of wine tasting. This conceptual model was further refined by Hall and Macionis (1998, p. 199) into an activity/destination hub model while Getz (2000, p. 4) adopted a demand/supply systems approach based upon consumers (experiences required) and suppliers (facilities offered). Getz (2000) went on to expand this approach to include a wine tourism value chain - a resource base overlaid by viticulture overlaid by wine production overlaid by wine tourism -

with each level adding value (Getz, 2000, p. 10). Hall *et al.*, (2000b, p. 7) also adopted a systems approach based upon a supply and demand model resulting in a "wine tourism experience". The supply side consisting of an amalgam of inputs from both the wine and tourism industries ("winescape") while the demand side was based on the consumer's past experience, motivations, information, perception and culture. Mitchell (in progress) cited in Mitchell *et al.*, (2000, p. 133) proposed:

> ..a three dimensional model that combines the spatial (*setting*) and temporal (*stage of travel or time*) dimension of the wine tourism experience with the *activity* of tourism.

Figure 4.0 is a conceptual model of the wine tourism market showing both demand and supply factors together with available marketing option tools that can be mixed to create a viable wine tourism market place. This is the market-place model developed for and around which, this thesis is based. Care must be taken to clearly distinguish between individual wineries (see Chapter 6) and the destination market-place of a wine region (see Chapter 7).

Porter (1990) expressed the view that within some industries, the clustering of similar businesses can contribute greatly to the creation of a market-place with a considerable number of competitive advantages. Interestingly Porter (1990) used as an example the complementary businesses of wineries, restaurants, balloon rides, wine train, sport venues, accommodation providers, cafes, gift shops, purveyors of unique regional cuisine located in the Napa Valley adjacent to San Francisco as an illustration. Similarly in the Niagara wine-region of Canada, Telfer (2000b) argues that the existence of these business clusters or strategic alliances has economically enhanced the region as a whole.

4.3 Development of National, Regional and Local Wine Tourism Structures

In his seminal writings on management theory Drucker (1955) proposed that entrepreneurs and business managers should determine which line of business to pursue and having made that judgment to concentrate on it. These arguments have been reinforced by other business management authorities including Porter (1994), Kotler *et al.* (1994), Mitzenburg (1995) and Peters (1995). The theory reasons that a business manager is only able to master the intricacies, knowledge and interpersonal networks pertinent to one domain or in closely related areas of business.

Leiper (1995, 1990a, 1990b) argues that tourism is an example of a "partially industrialised industry" in that only those organisations that have a direct relationship to the tourist become actively involved in promoting, marketing and coordinating the tourism industry. Often those enterprises that are peripherally involved do not perceive themselves as being part of the tourism industry itself.

In the case of wine tourism, research has shown that many wineries regard themselves only as wine producers and not as tourism attractions (Macionis, 1998a; Macionis, 1998b; Macionis, 1997; Hall and Johnson, 1997). As between the wine and tourism industries researchers have identified a number of obstacles that inhibit the creation of effective linkages:

- a tendency by wine producers to be production oriented and to regard the wine industry's traditional outlet channels as being of greater importance;
- a lack of understanding and expertise by wineries with reference to tourism and a consequent inability to develop and market appropriate wine tourism products and services;
- the tendency to regard tourism as a mere secondary or tertiary activity and
- the inadequacy of linkages leading to deficiencies in inter-sectorial unity and a lack of cohesion within their own industry groupings.

(Hall and Page, 2002; Hall *et al.*, 1998)

Accordingly this dearth of relationships between the two industries is a major impediment to the growth of wine tourism. It is in this context that government, at all levels has a critical role to play. The formulation of distinct wine tourism organisations provides a foundation for broadening the profile and status of the wine industry within the tourism sector. Even more significantly it establishes a framework for creating and developing inter-sectorial linkages by encouraging both awareness and cohesion through stakeholder participation (Hall *et al.*, 1998; Macionis, 1997, 1996).

Strategies to integrate wine (and food) with tourism can occur at local, regional and national levels. Coordination then becomes of great importance. The prominent roles of bodies designed to implement such strategies are integration, cooperation and communication between the two industries, with the additional activities of research, education, marketing, promotion, tourism product development and training (Hall *et al.*, 1998; Macionis, 1998). Additionally, Hall *et al.* (1998) observed that although the establishment of such organisations are probably desirable, automatic success is far from guaranteed. Higher level policy formulations are probably best implemented at a lower level in order to achieve the desired objective. This formula has commonly been used within the European Union (EU), the United States, Canada and Australia.

Within the EU the Dionysus multimedia network of European wine producing regions, which comprise over 60 wine regions, was established in 1992 with support from the then European Community. The Europäische Weinstrassen (European Council of Wine Routes), based in Bordeaux, is part of the Assembleia das Regioes Europeias Viticolas (European Council of Wine Regions) which is included in the Dionysos multimedia network. The principle objective of the Europäische Weinstrassen is related to the improvement of the service quality of all wineries on the various wine trails/roads throughout Europe. At a lower level, a number of countries and wine regions have also established wine tourism and wine trail organisations although these are largely funded by private enterprise participants (Examples: Movimento del Turismo del Vino of Italy; Comté Régional du Tourisme de Longuedoc-Roussillon of France; Alentejo's wines route of Portugal) (Getz, 2000; Hall *et al.*, 2000d).

Although the wine tourism concept, in spite of Napa, is surprisingly not recognised as such within the United States, wine industry promotional and marketing organisations have been established in a number of states (Examples: New York Wine and Grape Foundation, Texas Wine Marketing Institute, Oregon Wine Advisory Board, Colorado Wine Industry Development Board). Effectively tourism is often included in their activities with funding mainly supplied by state governments (Hall *et al.*, 2000d).

In Australia, between 1993 and 1996, a number of states (Victoria, South Australia, New South Wales) founded dedicated wine (and food) tourism organisations/plans to co-ordinate, promote and develop wine tourism (Hall and Macionis, 1998; Macionis, 1998). More recently the governments of Queensland, Western Australia and Australian Capital Territory have funded wine tourism strategies/projects (Macionis and Cambourne, 2000). At a higher level a National Wine Tourism Strategy has since been developed in Australia leading to the creation of a National Wine Tourism Council (NWTC), designed to implement this strategy (Douglas *et al.*, 2001; Macionis and Cambourne, 2000).

Federal and state funds allocated are used to provide research, education, co-operative strategies/mechanisms and information provision (Macionis and Cambourne, 2000). Funding examples include wine (and food) trail development (Albury - Wodonga, NSW; Geelong, Vic.) wine interpretive/ visitor centres (Barossa Valley, SA; McLaren Vale, SA), the provision of signage for vineyard areas (Cessnock, NSW) and the development of regional wine and cultural tourism strategies (Barossa Valley, SA; Hunter Valley, NSW; Augusta-Margaret River, WA) (Macionis and Cambourne, 1998a). The pivotal role played by government in Australia, at both the federal and state levels in the development of wine tourism as a significant adjunct to the country's wine industry, is exemplified by the construction of a National Wine Centre in Adelaide (Wine Industry Journal, 2001; Ruston, 1999).

International research suggests that wineries promoting the association of wine and tourism, benefit greatly from additional cellar-door sales as well as obtaining revenue from other merchandise sales and related services. The development of alliances either formal or informal amongst wineries, food outlets (especially purveyors of regional cuisine), accommodation providers, tour operators and other appropriate attractions emphasise the significance of horizontal and vertical linkages for increasing business at both the entity (see Chapter 6) and destinational levels (see Chapter 7) (Telfer, 2001; Hall *et al.*, 2000c; Telfer, 2000a; Telfer, 2000b; Hall *et al.*, 1998). In New Zealand wine tourism is currently progressing along the same lines of development as outlined, although currently a more *laissez faire* attitude prevails with regards to governmental involvement.

4.4 International Wine Tourism

As noted earlier wine trading for hundreds of years had always been conducted using brokers acting as conduits between producers and resellers. Because of the expense, inconvenience and limited destinational facilities, travel to the wine producing areas was largely avoided (Brennan, 1997; Spahni, 1995).

More recently, throughout the producing regions of the world, wine tourism has become increasingly important with many members of the wine consuming public exploring the various global wine regions (Anderson, 2003). There are a number of reasons for this:

- The climatic conditions of wine regions are normally affable, consisting of long sunny days during the growing season with mildish weather for the rest of the year.
- An increasing involvement in both tourism and wine as a result of growing increasing consumer affluence.
- Rural wine regions are often seen as peaceful and beautiful places, while wineries, situated amongst aesthetically pleasing vineyards, are perceived as both educative and interesting.
- Many countries have high duties/levies on alcoholic beverages but often favourable exemptions are granted to returning residents.
- Urban citizenry are able to commune with nature while acquiring seemingly expert knowledge, which is often both admired and envied by friends and relatives.
- Consumers often prefer to buy direct from the cellar door, as by avoiding

both wholesalers and retailers they can purchase for a lower price.

- Distinctive and rare wines, not normally obtainable through other avenues, may also be made available by producers.

(Johnson and Robinson, 2001; Getz, 2000; Hall *et al.*, 2000d; Robinson, 1999)

In many countries wineries, in a bid to attract more visitors, have deliberately expanded their facilities to include barbecue areas, souvenir shops, wine museums and on-site accommodation in addition to the vineyard and production facility tours commonly promoted. As well as offering traditional wine tastings, vineyards often combine with art exhibitions, performances of jazz, classical music or opera, as well as proclaiming the qualities of specialist cuisine (Williams and Kelly, 2001). A number of other activities, considered to be appealing to visitors with an interest in wine, are commonly offered at both vineyard and wine festival venues. As well as the enhancement of physical visitor facilities within the world's wine regions international wine tourism has been further promoted by those who have devoted much of their writing careers to wine related topics.

Wine writers, originally a Victorian phenomenon of Great Britain, began by confining their contributions to newspaper and magazine columns, offering considered opinions of particular wines as well as a more general analysis of the general merits of particular wine styles. Expanding beyond these confines by utilising their reputation, such international wine writers (Example: Hugh Johnson, Jancis Robinson and Oz Clarke) began to produce wine buyers' guides annually in book form (Example: Clarke, 1997). In an attempt to de-mystify wine for the benefit of the inexperienced, these were originally targeted towards those readers unsure of the terminology, the sensory merits of particular wines, the wine-cuisine relationship, the wine styles currently acceptable and the names of meritorious wine makers.

Social snobbery has always been part of the wine drinking experience (Barr, 1988). Ravenscroft and van Westering (2001) adopt a controversial "privileged class" perspective and argue that the social world of wine is inhabited exclusively by those knowledgeable about wine while others such as tourists who by visiting wineries and vineyards realise their inadequacies thereby legitimising the status of the true inhabitants of this social world of wine. With the help of wine "critics" such as Hugh Johnson in Britain and Robert M. Parker Jr. of *Wine Advocate* fame in the United States, the aim has been to ensure that wine "philistines" will increasingly discriminate between brand names and labels within brands (Laushway, 1997). In Britain *Decanter* magazine and in the United States the *Wine Spectator* are perhaps the most widely read publications related to wine (Robinson, 1999).

The advent of wine tourism as an activity, led to the production of wine atlases of particular national wine regions, moderately expensive but lavishly produced, with location maps, coloured photographs of vineyards, their history and written profiles of their respective wine makers (Example: Platter, 1999; Halliday, 1998). The production of international wine atlases became a natural progression from these. Covering all of the world's major wine regions, and providing the same but condensed regional information as the national wine atlases, such publications are both expansive and extremely costly while providing a comprehensive background to the history of grape growing and wine production throughout the world (Example: Johnson and Robinson, 2001; Clarke, 1995). The *Oxford Companion to Wine,* normally published bi or tri-annually and edited by Jancis Robinson (Robinson, 1999; Robinson, 1997) is really an encyclopedia of wine and wine terminology from A to Z covering every conceivable topic related to wine - the ultimate literary collectable for the wine-lover. Audio tapes, video tapes, CD's, DVD's and the Internet (Example: GrapeVines Worldwide, 2003) have followed the progression of the printed literature, again utilising the acknowledged expert names of the known wine writers, even as the available technology has changed. Because of such wine specific publications with geographic references, as well as the inclusion of wine tourism destinations within travel guides such as Lonely Planet and Foders, knowledge of the wine producing regions of the world has gradually become more widely known amongst those interested in both wine and travel.

Wine tourism, as well as featuring at academic tourism conferences (Pforr, 2002), also constitute the entire subject matter at international wine tourism conferences. Designed for wine and tourism industry players, academics and national, regional and local governmental officials these are now becoming increasingly common. The first of these was held in 1998 at Margaret River in Western Australia (Dowling, 1998; van Westering, 1998), a European conference in Guildford, Surrey, U.K in 1999 (Beverland, 2000; van Westering, 1999), the first New Zealand wine tourism conference in November 2000 at Marlborough (Marlborough Express, 2000), and a second Australian wine tourism conference in 2001 in Rutherglen, Victoria (Dowling, 2001; Beverland, 2000).

According to Faulkner *et al.* (2002) wine tourism together with other forms of specialised activity based tourism is likely to increase in importance during the current century. A considerable component of this is the high yield, mid week MICE market (meetings, incentive, conferences, exhibitions) involving travel for corporate employees to wine regions which is now becoming more common-place (Executive Tours, 2003; Hein, 1997; Steinauer, 1997). Wine tourism now exists worldwide in almost every major wine growing area.

In Europe, wine tourism, involving visits to winegrowers is generally less common, especially in the more prestigious wine regions (Choisy, 1996; Desplats, 1996; Mallon, 1996). According to Thévenin (1996), France has two forms of wine tourism development. The first of these (Example: Beaujolais) involves a large investment in infrastructure - wine routes, wine museums, restaurants, accommodation and research centres. The second type is exemplified by the Great Wine Club of the Chateaux of Longuedoc where associations of winegrowers market to regional visitors, and infrastructure is more restricted (Examples: Bordeaux and Burgundy). In Burgundy for example only 260 of 5000 winegrowers are directly involved in tourism (Choisy and Mallon, 1996). Wine sales are often not the prime motivating force. Some regions (Example: Cognac) utilise tourism more as a marketing tool, rather than for wine sales, although the region has many facilities designed to attract tourists (Desplats, 1996). As well as the established wine routes of Western

Europe (France, Italy, Spain, Portugal, Germany, Austria) (Hall *et al.*, 2000b; Getz, 2000; Gilbert, 1992; Baranyi, 1990; McArthur, 1997; Financial Times, 1997), within Eastern Europe, Hungary in 1995 established its first wine route - the Villány Siklós Wine Road in Baraya County (Szivas, 1999; Trew, 1994); likewise Moldova, an important wine grower in Soviet Union times, has established wine routes in a bid to attract more tourists (Bastianich and Lynch, 2002; Hall *et al.*, 2000c; Johnson, 1994).

Within the Americas: the Northeast Wine Route, stretching from Windsor Ontario in Canada in the west, to the Long Island region of New York State in the east (Shriver, 2002; Hill and Hill, 2000; Telfer, 2000a; Verburg, 1999; Henehan and White, 1990); the Napa Valley in California, currently attracting over five million visitors annually (Shriver, 2002; Skinner, 2000; Conway, 1990) and the Maule Valley, Cachapoal, and Colchagua (long established as wine growing areas in Chile) - have all recently established wine routes for tourists (National Chile Tourist Board, 2003; Sharples, 2002).

South Africa now has fourteen recognised wine routes in the Cape Province. The earliest of these Stellenbosch dates from 1971. Each wine route is designed to promote a unique geographic regional or individual wine style (Preston-Whyte, 2000).

In Oceania - Australia has developed significant wine routes throughout the major wine regions of Adelaide Hills, McLaren Vale, Coonawarra, and the Barossa , Clare and Eden Valleys of South Australia, the Hunter Valley of New South Wales, the Swan Valley and Margaret River of Western Australia and the Yarra Valley and Grampians of Victoria (Johnson and Robinson, 2001; Rutzou, 1997; Berman, 1997). According to Beames (2003), although the "grape" can now take its place alongside the "rock" and the "reef" as major Australian tourism attractions, there are still a number of structural wine tourism issues to be resolved in regional Australia.

Some tour operators and travel agents now specialise in wine tourism and the number of wine regions throughout the world without their own special wine route or winery trail is rapidly diminishing. This is particularly so in New Zealand where wine tourism is now gaining greater acceptance within the different wine regions (Hall *et al.*, 2000b).

4.5 Wine Tourism in New Zealand

The possibility of wine tourism in New Zealand until the mid 1970's was restricted by both legislation (see Section 8.1, Chapter 8) and the poor quality of wines produced (see Section 2.4 of Chapter 2). The notion of recognised New Zealand wine regions and the production of quality wines of unique style related to those regions only emerged following the export successes of the 1990's (see Section 2.6 of Chapter 2). Graham (1980) cited in Hall *et al.* (2000b), accorded Vidals of Hastings as the pioneer wine tourism enterprise in New Zealand. Not only were wine sales, tastings and winery tours offered to visitors but the winery also boasted a restaurant and wine museum.

In common with other countries research into aspects of wine tourism within New Zealand has been gathering pace, after a slow start. From the mid 1990's a number of papers have been published by New Zealand researchers (Examples: Mitchell and Hall, 2001a; Hall *et al.*, 2000a; Mitchell *et al.*, 2000; Mitchell *et al.*, 1999; Beverland *et al.*, 1998a; Beverland *et al.*, 1998b; Hall and Johnson, 1998a; Hall and Johnson, 1998b; Hall and Macionis, 1998; Hall *et al.*, 1997; Johnson, 1997; Hall and Johnson, 1997; Hall, 1996). Additionally graduate students from the University of Otago have written several dissertations. An unpublished report containing pertinent wine tourism research findings concerning the Marlborough region was also written by Bigsby *et al.*, 1998. In November 2000 New Zealand hosted its first international food and wine tourism conference at Montana's Brancott Estate in Marlborough, followed by an international Pinot Noir conference in 2001.

Although the major wine regions of New Zealand are covered fairly minimally by the international wine atlases (Example: Johnson and Robinson, 2001; Clarke,

1995) Australian wine writers have attempted to rectify this by devoting a considerable section of their publications to both New Zealand wine and the New Zealand wine regions (Example: Halliday, 1998; Halliday, 1996; Deves, 1996, 1995). In spite of a restricted consumer market derived from a minimal population base, admittedly augmented by international visitors, New Zealand has spawned a number of successful wine writers producing both newspaper/ magazine wine critiques and publications ranging from the modest (Example: the annual *Guide to New Zealand Wine* by Peter Saunders) to the moderately lavish (Example: Michael Cooper's award winning *Wine Atlas of New Zealand*, 2002). Michael Cooper, Keith Stewart, Bob Campbell and Peter Saunders are arguably the most influential of the current wine critics within the country.

Cuisine, a bi-monthly lifestyle magazine combining both food and wine, is probably the most widely read authority on New Zealand wine. As well as Michael Cooper's *Wine Atlas of New Zealand* (preceded by a number of editions of *The Wines and Vineyards of New Zealand)*, which reviews the country's wines, wine regions, wineries and wine-makers, a number of publications are solely devoted to "wine trails". The first of these by Talmont (1994), a national guide, has been followed by one North and two South Island guides (Thomson, 2000; Grant, 2000; Airey, 2000) and a number of regional "wine trail" guides (Examples: Central Otago wine region (Cull, 2001; Bodkin, 1997) and Canterbury wine region (Schuster *et al.*, 2002). The travel publishers Jasons has recently released two special editions of *Wine Trail Route Planners* for visitors wanting to further explore the wine regions of New Zealand.

Within the New Zealand context potential exists for wine tourism to greatly benefit those districts, containing wine regions, that are removed from the main tourism "loops". Destinations such as Hawkes Bay (branded now as "wine country"), Wairarapa, Nelson and Marlborough are the obvious examples (Collier, 2003). Various surveys have revealed the favourable economic benefits associated with wine tourism. The online New Zealand International Visitor Survey concerning wine tourists states that:

> They [wine tourists] are high yield travellers, spending on average 25% more per visit than other holiday visitors and they stay longer than the average international visitor, with 40% staying for 15 -28

nights. (Tourism New Zealand, 2003, online)

The extent of wine tourism in New Zealand can be measured in a number of different ways:

- The first measure is to calculate the percentage of wineries in each region offering wine tourism services such as cellar door sales and restaurant/cafe/bar facilities. As early as 1995, 60% of wineries in the country offered cellar door sales and 15% had either a restaurant, cafe or bar (see Table A.33 of Appendix A). By 2003, 79% offered cellar door sales and 34% had either a restaurant, cafe or bar (see Table A.34 of Appendix A).
- The second measure of the extent of wine tourism is to look at the prevalence of wine related events. Visitors are attracted to wine regions by special events such as wine (and food) festivals (see Section 7.3.3 of Chapter 7). As a measure of the growth in wine tourism in recent years the number of recurring annual wine events has increased nationally from 22 in 1997/1998 (Hall and Kearsley, 2001 p. 185) to 33 in 2002/2003 (see Table A.36 of Appendix A).
- The third measure is to gauge the level of economic benefits flowing from wine tourism. In a 1997 study by Hall and Johnson (1989) the economic benefit measured as the gross aggregate contribution of goods and services sold at wineries approximated NZ$127M. By wine region the greatest gains were to the largest regions (Examples: Auckland NZ$46M, Marlborough NZ$26M, Hawke's Bay NZ$19M).
- A fourth measure is to measure the extent of winery visitation. The *New Zealand International Visitors Survey 1995/1996* found that of international visitors, around 13% planned on visiting a winery during their stay in New Zealand (New Zealand Tourism Board, 1996, p. 17), while Hall *et al.* (2000a) citing Lawson *et al.* (1997), reported that 17% of domestic travellers had identified visits to wineries and wine tasting as an activity undertaken while on vacation in New Zealand. In a winery survey conducted in 1997 and reported by Hall and Johnson (1997) it was estimated that there were approximately three million visits to New Zealand wineries (2.5 million domestic (82%) and 550,000 international (18%)) throughout that year. This

was considered to be an under-estimate as only 42% of respondents counted visitors systematically and the authors considered that this was biased in favour towards wine purchasers rather than actual visitors.

- A fifth measure of the extent of wine tourism is to consider the significance of cellar door sales to individual wineries. According to Hall and Johnson (1997) cellar door sales on average account for 20% of winery gross revenue. The extent of this dependence varied between regions and was also related to winery size (see Section 6.2 of Chapter 6).
- The final measure of the extent of wine tourism in New Zealand is to consider the wine regional/sub-regional destinations and the extent to which tourism facilities are offered. With the exception of the smallest of sub-regions all offer wine (and food) festival events with two being held in districts where grapes are not commonly grown (see Table A.36 of Appendix A). All regions (except the smallest) offer organised wine tours to clusters of wineries but where the wineries are more dispersed wine trails/cycle trails are less common. The availability of wine regional guides/maps is more restricted but entries in generic travel guides (Example: Lonely Planet Guide Series, 2000) cover almost all regions/sub-regions (see Table A.35 of Appendix A).

Wine tourism exists throughout all of the country's wine regions with many actively promoting it, even to cruise ship passengers (The Dominion Post, 2002; The Dominion, 2001; The Independent, 1999). Details of wine trails maps and guides are generally available at regional visitor centres. Wine trails are also used as links between wine regions (Example: North Canterbury and Marlborough) (Food Industry Week, 2003). Variations as to the extent of wine tourism vary by region with those close to large cities (Auckland, and Wellington) and on the main international tourism loops (Auckland, Canterbury and Otago) having clear advantages. A growing number of inward-bound tour operators also offer organised wine tours, while Tranzrail, Air New Zealand, Qantas and Flight Centre actively promote travel to the wine regions especially Wairarapa, Marlborough, Canterbury and Central Otago. Within the wine regions many of the wine-tour operators are local and small, offering both scheduled or customised tours within the regions (Example: Fullers offer boat/coach wine tours to Waiheke Island). Tours frequently offer regional food, arts, crafts, music, sports, and even Maori culture as "add-ons". Most are by coach or mini-bus but some use cycling, walking and boats as the means of transportation. Accommodation packages are also available if required, increasingly on vineyard properties but more often in nearby towns (Campbell and Jacobs, 2003; Hall and Kearsley, 2001; Hall *et al.*, 2000a; Lonely Planet Guide Series, 2000).

In spite of the successes enjoyed by wine-tourism participants within New Zealand, the country still lags behind others in its formal recognition of the significance of wine tourism. In wine regions/sub-regions such as Waiheke, Hawkes Bay, Nelson, Marlborough and Central Otago although wine may feature in both branding and promotion no regional wine tourism association has yet been inaugurated (Getz, 2000; Hall and Macionis, 1998). A way forward is possibly to adopt Australia's approach, utilising more inter-sectorial links, stimulated by governmental/private enterprise partnerships as advocated by Johnson (1998). At the Marlborough conference it was suggested that a national network of wine, food and tourism businesses be set up under the Tourism Industry Association of New Zealand (TIANZ) and that a strategy be developed to ensure that food and wine tourism experiences become a leading visitor motivator by 2010 (Marlborough Express, 2000).

4.6 Wine Tourism in the Auckland Region

Traditionally, Auckland boasting the country's largest international airport, has always been regarded as an international tourism gate-way city and short-stay venue prior to tourists embarking on a tour of New Zealand (Collier, 2002; Hall and Kearsley, 2001; Pearce, 1995). Increasingly, as tourist attractions have been developed within the city and in its immediate environs, it is now being regarded as a destination in its own right (Page *et al.*, 2001; Hall and Kearsley, 2001). During the summer months it is also a popular cruise ship destination with numbers of ship visits increasing annually from 21 during the 1996/1997 season to over 30 in more recent years (Collier, 2002). With over ten million international visitor nights, almost seven million domestic visitor nights in 2000 (see Tables A.21 and A.22 of Appendix A) and a regional population of over one million there is considerable scope for suitable tourism attractions within the greater Auckland area.

As noted earlier wine tourism is increasingly being regarded as an appealing activity for inter-regional and international tourists as well as locally based day-trippers. All of the sub-regions constituting the Auckland Wine Region (see Section 2.15 of Chapter 2) are involved in wine tourism. Although all sub-regions are within one-half to one hour's travelling time from the CBD the extent of wine tourism varies enormously as between the five sub-regions of South Auckland, Waiheke Island, Henderson/ Henderson Valley, Kumeu/ Huapai/Waimauku and Matakana/Mahurangi). Campbell and Jacobs (2003, p. 14) observed that:

> Auckland offers a rich and varied tapestry of wineries and wine styles. Many wineries encourage visitors to enjoy a picnic and perhaps a game of pétanque in a vineyard setting. Attractions include art exhibitions, live music, vineyard tours and tutored tastings, particularly in the summer months. Old and rare vintages at vineyard prices provide yet another reason to tread the Auckland wine trails.

Although there are 66 wineries located in the Auckland Wine Region (see Appendix D), including the head offices and some wine-making capabilities of the country's three largest wine-makers (Montana, Villa Maria and Nobilo) the region grows less than two per cent of the country's grapes (see Section 2.7 of Chapter 2). Accordingly, unlike other wine regions in the country, grapes and musts are transported into the region for wine-making. Citing comments made by a visiting Australian wine writer Campbell and Jacobs (2003, p. 14) reported that:

> .. he [the writer] didn't have to go all over the country to try a good cross- section of New Zealand wines when a tour of Auckland wineries could achieve the same end.

The wine sub-regions of Auckland are extensively reviewed by most of the wine writers in the various wine publications - general books on wine (Examples: Courtney *et al.*, 2003; Stewart and Judd, 2001) - international wine atlases (Example: Johnson and Robinson, 2001) - national atlases (Example: Cooper, 2002) - wine trail publications (Example: Campbell and Jacobs, 2003), and generic travel guides (Example: Lonely Planet Guide Series, 2000).

There is a paucity of research in all aspects of wine tourism in Auckland with only six papers currently available. Three of these relate to wine tourism consumer research, two to wineries and one relates to wine (and food) festivals.

Beverland *et al.* (1998a, 1998b), report on a cellar door consumers survey in the two Auckland wine sub-regions of Henderson/Henderson Valley and Kumeu/ Huapai/Waimauku. Mitchell, (in progress) cited in Hall *et al.*, (2000a) reviews preliminary results relating to Auckland included in a 1999 *New Zealand Winery Visitors' Survey* gathering data on the winery visitor, their experiences and their on-site and regional travel behaviour, with a follow-up survey of the same sample to determine actual post-visit behaviour and reminiscence.

Johnson (1998) and Hall and Johnson (1999) discuss a survey involving wine tourism suppliers, which although national, included responses from Auckland wineries. The survey involved the characteristics of wineries, the extent of cellar door sales, the availability of wine tourism products and services, the perception of wineries of their customers, inter-sectorial relationships and marketing. The Auckland festival "Vintage Alfresco" was one of seven wine events surveyed in Australia and New Zealand. The research looked at the life-cycle of such events, their benefits to the region and to those businesses involved (Hoffman *et al.*, 2001).

The proximity of the Auckland wine sub-regions to a large urban area with considerable international visitor traffic is an obvious advantage, however in certain areas (Henderson/Henderson Valley, Waiheke and parts of South Auckland) the encroachment of urban housing can detract from the desirability of the location (see Section 7.4 of Chapter 7).

At the destinational level the Auckland wine region has eight wine (and food) festivals annually. Of these, two are located in urban areas away from the wine sub-regions (see Table A.36 of Appendix A). Sources of information for destinational visitors exist both regionally and sub-regionally. These include regional guides/maps (Example: *Winemakers of Auckland*), sub-regional wine trail maps (Examples: *Wine Trails of Kumeu & the Wild West Coast; Waiheke Island Vineyards*), tour operators (Examples: Auckland Fine Wine Tours, Auckland Wine Trail Tours; Waiheke Art and Wine Tours) and visitor centres (Examples: Tourism Auckland; Tourism Waitakere; Rodney Community Tourism Trust) (New Zealand Herald, 1999).

At the individual entity level information available concerning wine tourism facilities within the various wine sub-regions of Auckland is both sparse and contradictory (Examples: Campbell and Jacobs, 2003; New Zealand Herald, 2002; Thomson, 2000). From the available information the wineries in Waiheke, Matakana/Mahurangi and the Clevedon district of South Auckland appear to offer a greater level and variety of visitor facilities than the sub-regions closer to the CBD of Henderson/Henderson Valley and Kumeu/Huapai/Waimauku. The facilities offered include cellar door sales, wine tastings, winery/vineyard tours, picnic/barbecue areas, cafe/restaurants/bars, on site accommodation, wine museums and sporting facilities. The most comprehensive wine tourism facility in Auckland has recently been constructed by Villa Maria in South Auckland for NZ$30M - this includes a restaurant, conference facility and wine educational facility. A golf course is also planned for on the 40 hectare site (Campbell, personal communication; New Zealand Herald, 2003e).

4.7 Summary

Wine tourism involves more than just visiting wineries and vineyards. Rather it is the summation of a number of unique experiences - the "winescape". This includes ambience, landscape, surrounding social environment, regional culture, cuisine, local wine styles and a variety of unique leisure activities that makes wine tourism popular with a growing number of travellers. Wine tourism can be considered as a form of consumer behaviour, based not only on the appeal of wine and wine regions but also involving development, marketing and promotional strategies for both the wine industry and market-place destination, in which wineries and wine-related experiences are the pre-dominant attractions.

Modern forms of wine tourism have not long been recognised as such. Accordingly published research is relatively sparse, although in recent years conferences wholly devoted to the topic have been held in a few countries. New Zealand research to date largely reflects this trend, although papers are now gradually being published on its various aspects.

A number of researchers have argued that because both wine and tourism industries are involved, that for effective co-ordination and communication an organisational body comprising both industries, with or without governmental involvement is necessary. It is argued that such an organisation can also engage in a number of other activities including marketing, promotion, and training,

Internationally wine tourism is expanding rapidly throughout most wine producing regions in the world, although New Zealand including Auckland are further behind in both recognition and extent than other comparable new world countries. In the case of Auckland the growth of wine tourism varies considerably as between the five sub-regions constituting the Auckland Wine Region. To further investigate wine tourism generally and more specifically in the Auckland region it is necessary to consider in detail all aspects of the wine tourism market model (see Figure 4.0 of Chapter 4). The demand or consumer side of the model is analysed in Chapter 5, while Chapter 6 looks at the supply side of the model from the point of view of the individual winery participant and finally Chapter 7 scrutinises the wine tourism destinational market-place.

Chapter five: The Demand Side of Wine Tourism

5.0 Introduction

> Winery visitors include both the dedicated wine lover and the majority for whom it is an ancillary experience (Getz, 2000, p. 59).

Consumer behaviour which lies at the heart of all marketing theory is critical to an understanding of wine tourists generally. Marketing theorists have advanced a number of consumer behaviour models but few studies exist to test these empirically. There is a general paucity of research on consumer behaviour in wine tourism, much of which although based on small sample sizes and restricted geographical areas, gives reasonably consistent results. Originally inferred from winery surveys, consumer characteristics, have more recently been derived directly from consumer surveys.

With wine tourism, market segmentation is used to target population sub-groups and identify "high yield" winery visitors. Such segmentation may be based on external factors (demographic, socioeconomic, geographic), internal factors (motivations, psychographic, wine knowledge, past wine experiences) or product purchase decisions. Attributes can then be used to develop typologies of wine tourist sub-groupings, but such classifications do not factor in the hedonistic nature of wine and tourism; such experiential aspects having attracted only sparse research to date. After consideration of all factors and using available information sources, potential wine tourism consumers develop perceptions and expectations of the wine tourism product (see Figure 4.0 of Chapter 4).

5.1 Consumer Behaviour

The significance of the psychological processes that occur during both pre-purchase and post-purchase stages of decision making by the consumer is stressed in the definition of consumer behaviour by Engel *et al.*, (1995, p.14).

> Consumer behaviour is those activities directly involved in obtaining, consuming and disposing of products and services including the decision processes that precedes and follows these actions.

Such luminaries of marketing theory as Kotler have always recognised the critical importance of consumer behaviour in the field of marketing theory (Kotler *et al.*, 1994). In order to explain consumer behavior a number of models, adapted for tourism, have been proposed. One of the earliest examples by Mathieson and Wall (1982), suggested a linear five stage-model of travel-buying behaviour consisting of stages:

- Felt need/travel desire.
- Information collection and evaluation.
- Travel decision (choices between alternatives).
- Travel preparation and travel experiences.
- Travel satisfaction, outcome and evaluation.

A later example by Moutinho (1995), proposed a further general model related to tourism purchase behaviour. His model, related to the three behavioural concepts of motivation, cognition and learning. This was a feed-back model in which purchase motivation initiates the sequence of behavioural events, cognition activates mental processing and learning causes subsequent changes in future behaviour. The Moutinho (1995) model constituted the three parts of pre-decision/decision, purchase evaluation and repeat-buying (post-purchase). These two models of consumer behaviour as quoted, are representative only of innumerable others, which have been developed over the last two decades.

Kotler *et al.* (1994) and Teare *et al.* (1994) both argue that in spite of its significance little empirical research exists to test the numerous models of consumer behaviour against observed behavioural patterns. Although complexity and over-generalisation are generally given as the main reasons for this, most of the existing models are fairly old and are not really reflective of today's lifestyles or recent technological developments (Swarbrooke and Horner, 1999). With regard to "place marketing" Kotler *et al.* (1993) also argues that this validity problem is further exacerbated as "place marketing" in the tourism context invokes consumer behaviour patterns with greater emotional connotations than those related to the purchase of everyday products/services. Swarbrooke and Horner (1999, p. 3) reinforces and extends these points:

> .. we must try to understand how consumers make their decisions to purchase or use tourism products. If we understand their behaviour patterns, then we will know when we need to intervene in the process to obtain the results we want. We will know who to target at a particular time with a particular tourism product.

These internal psychological processes, known as consumer (buyer) behaviour, which can relate to both individuals or groups, lie at the heart of all marketing theory and the models developed appear to be at their most relevant when applied to market segmentation (Goeldner and Ritchie, 2003; Vanhove, 1995; Fletcher, 1995).

Prior to purchase, consumers create a perception of the product or service in question (Middleton and Clarke, 2001). It is generally agreed by most marketing theorists that such perceptions are determined by demographic, psychographic and motivational factors tempered by the dual influences of past experiences and available information. Reminiscence arises during the post-purchase period and may influence subsequent purchasing decisions, while expectations may result from deliberations after consideration of all other factors and will also form part of the final perception (Middleton and Clarke, 2001; Swarbrooke and Horner, 1999; Holloway and Robinson, 1995; Teare *et al.*, 1994). Such theories of consumer behaviour relating to tourism can now be considered within the confines of wine tourism; particularly with regard to the demand side of the wine tourism market model (see Figure 4.0 of Chapter 4).

5.2 Wine Tourism Consumer Research

Tables 5.0, 5.1 and 5.2 together provide summaries of wine tourism consumer research up to the present time and are used throughout this chapter. Originally the research on consumers, based on interviews/surveys with wineries only (supply), was considered incomplete, as being unsystematic it was based on approximations only (see Table 5.0) (Reid, 1990). More recently there has been a tendency to directly survey consumers (demand), thereby gaining a greater insight into the characteristics and motivations of winery visitors (see Table 5.1). Miscellaneous research methods such as case studies, anecdotal evidence and tourism literature reviews have also been used in a small number of cases (see Table 5.2).

Table 5.0 Wine tourism consumer research: supply focus

Researcher	Year	Country	Summary of Research
Golledge and Maddern (Victorian Wine Commission)	1994	Australia	Profiles of visitors to Victorian Wineries - attempts to provide a better understanding.
Hall	1996	NZ	Wine Tourism in New Zealand. Examines demand on the basis of industry. Wine tourism definition.
Macionis	1996	Australia	Nature and potential of wine tourism in Australia. Inferences about wine tourists.
Johnson	1998	NZ	New Zealand national winery survey. Looks at the tourism/wine linkage and attitudes to tourism. Inferences about wine tourists by winery survey.
Hall & Macionis	1998	Australia & NZ	The Development of wine tourism in Australia and New Zealand. Inferences made about wine tourists.
Robins	1999	Australia	Potential areas of research drawn from visitor surveys.
King & Morris	1999	Australia	Results of 1996 study of Margaret River winery visitors that tracks their post-visit behaviour.
Ali-Knight & Charters	1999a	Australia	A study of wine education in West Australian wineries.
Carlsen, Getz & Dowling	1999	World	Details papers presented at the 1rst Australian Wine Tourism Conference; includes motivation/ behaviour.

(Source: Mitchell *et al.*, 2000 updated)

Table 5.1 Wine tourism consumer research: demand focus

Researcher	Year	Country	Summary of Research
Paradice and Krumpe (Hunter Valley Research Foundation)	1989	Australia	Research into the characteristics of day visitors to the Hunter Valley. (cited in Macionis, 1997).
Corigliano (Movimento del Turismo del Vino)	1993	Italy	Research into people who consider wine as an important aspect of their holiday.
Dodd, T.	1995	USA	Opportunities and pitfalls of tourism for the wine industry (Texas wineries).
Dodd and Bigotte	1995	USA	Study of visitors to Texas wineries - examines perceptions and behaviour, demographic segmentation.
Maddern & Gollege (Victorian Wine Commission)	1996	Australia	A cellar door survey that attempts to gain a greater understanding of the Victorian wine tourist.
Dodd & Gustafson	1997	USA	The effect of product attributes, setting and service, on attitudes and behaviour at wineries.
Morris & King	1997	USA	A study of the decision making process of winery visitors.
Beverland, James, James, Porter, Stace	1998	NZ	A study of wine tourists in West Auckland. Replication Morris and King, 1997 winery market.
Longo	1999	NZ	An investigation of the winery visitor at a selected number of wineries.
Mitchell & McIntosh	1999	NZ	A framework for the study of the New Zealand winery visitor.
Mitchell & Hall	2001a	NZ	Reporting on aspects of Mitchell (in progress) survey into New Zealand winery consumers.
Mitchell & Hall	2001b	NZ	Looks at aspects of the lifestyles of New Zealand winery visitors including wine clubs, wine cellars and place of purchase activities.
Houghton	2001	Australia	Looks at the propensity of festival attendees to later visit festival participating wineries.
Mitchell	in progress	NZ	A nationwide survey of winery visitors, their on-site experiences and future behaviour.

(Source: Mitchell *et al.*, 2000 updated)

The research focusing on wineries (supply) is inferential only and should be regarded only tentatively. Information derived can be broadly summarised as:

- Winery visitor characteristics/demographics (Examples: King and Morris, 1999; Johnson, 1998; Macionis, 1996; Golledge and Maddern, 1994).
- Visitor motivations (Examples: Ali-Knight and Charters, 1999a; Johnson, 1998; Macionis, 1997; Hall, 1996).
- Classifications of wine tourism/tourists (Examples: Hall and Macionis, 1998; Macionis, 1996; Hall, 1996).
- Post-purchase consumer behaviour (Example: King and Morris, 1999).
- Future areas of consumer research (Examples: Carlsen, Getz and Dowling, 1999; Robins, 1999).
- Consumer wine education (Example: Ali-Knight and Charters, 1999a).

Empirical data gained directly from the consumer by way of survey or structured interview has increasingly been used to gain a more accurate understanding of who the wine tourist actually is. This can be summarised as follows:

- Winery visitor characteristics/demographics/lifestyles (Examples: Mitchell, in progress; Mitchell and Hall, 2001b; Longo, 1999; Beverland *et al.*, 1998a; Maddern and Golledge, 1996; Dodd, 1995; Dodd and Bigotte, 1995).
- Winery visitor decision making processes (Example: Morris and King, 1997).
- Visitor motivations (Examples: Mitchell and Hall, 2001; Corigliano (Movimento del Turismo del Vino), 1993).
- Effect of product attributes on visitor behaviours (Example: Dodd & Gustafson, 1997).
- Effects of wine festivals on consumer behaviour (Example: Houghton, 2001).

5.3 External Influences on Decision Making

External influences (Examples: gender, age, origin, family life-cycle stage, income, educational level) play a key role in a consumer's decision making process. Accordingly these influences are identified and used to form part of the basis of market segmentation for target groups in a process of classification (Middleton and Clarke, 2001; Vanhove, 1995; Fletcher, 1995).

Table 5.2 Wine tourism consumer research: miscellaneous focus

Researcher	Year	Country	Summary of Research
Morris & King	1999	Australia	A wine tourism product model from research into the Margaret River visitor.
Nixon	1999	Australia	A tour operators perspective on profiles of winery visitors (Victoria).
William & Young	1999	Canada	A case study that examines the influence of wine club membership on winery visitation.

(Source: Mitchell *et al.*, 2000 updated)

Various means of classification of wine tourists can be used (Getz, 2000; Hall *et al.*, 2000). They may visit wine regions as individuals (travelling alone or with friends or/and family), or they may be visiting as organised tour groups. A second possible means of classification is by place of origin. In this case visitors may be local, regional (or state), inter-regional (or inter-state) or international. A third possible means of classification is by length of stay within the particular wine region. Visitors may be either "day-trippers" or "over-nighters". Length of stay within a region may vary enormously, from a minimum of one night to a fairly lengthy period (Williams and Kelly, 2001). Pavan (1994) found in a survey of Italian wineries that 90% of visitors would prefer to remain in the area for more than one day. A fourth possible means of classification is by primary purpose of visit. This includes the familiar tourism classifications of holiday/vacation, visiting friends/relatives, business or other (a significant example of "other" is the so called MICE Market (Meetings, Incentives, Conferences, Exhibitions)) (Statistics New Zealand, 2003). The primary purpose of visit may also be more specific (Examples: wine, dining or picnicking). All of these classification methods are based on demographic, socioeconomic or geographic factors.

Although particulars such as age, gender, income and origin all provide a useful understanding into identifying wine tourists, Mitchell *et al.* (2000), emphasises that such data have been collected for a relatively small number of regions, mainly Australasian and are based on relatively small sample sizes within restricted geographical areas. However there does seem to be a degree of consistency across the studies (Machin, 2000) which reflects the observations of Macionis and Cambourne (1998) that "although generalisations can be made, each winery, region and festival will have its own set of visitor characteristics".

5.3.0 Demographic Factors

Demographic factors identify the main population characteristics that influence demand for products and services (Middleton and Clarke, 2001; Lawson, 1995). As such they often form part of the basis for market segmentation - to determine sub-groupings within a general population that are more likely to be attracted by the goods/services on offer (Goeldner and Ritchie, 2003; Vanhove, 1995; Fletcher, 1995).

According to Getz (2000), wineries attract small groups of family and friends, organised winery tours and larger groups on general sightseeing tours. Those with restaurants and other facilities are able to tap into a variety of other market segments, including private functions and corporate meetings. Data from South Australia (South Australian Tourism Commission, 1997), suggests that wineries provide sought after day-trip destinations especially when residents are entertaining family or friends. Winery visitors tend to visit regularly and visit more than one winery per trip (Getz, 2000).

In Margaret River, Western Australia, two thirds of visitors were repeat visitors, travelling in small groups and staying 2 - 3 days in the region. Inter-state visitors accounted for 29% of the sample while international visitors amounted to 9%

(Morris and King, 1997) (see Table 5.3 for comparative international studies; see Table 5.4 for comparative New Zealand studies).

Research conducted in Victoria on behalf of the Victorian Wineries Tourism Council (VWTC) determined that higher than average visitation (within the three months prior to the study) came from the following groups:

- people with advanced wine knowledge (59%);
- members of wine clubs (50%);
- those visiting small wineries (55%) and
- non-urban residents (48%).

Table 5.3 Visitor demographics: international venues

Demographic	Texas Wineries (consumer)	Victoria Wineries (consumer)	Canberra Wineries (producer)	Augusta- Margaret River Wineries (consumer)	Barossa Festival (consumer)
Male %	46	48	53	52	49
Female %	54	52	47	48	51
Mid-Age* %	49	39	56	29	51
Upper Income ** %	40	67	22	67	21
Trip Originated					
Within region %	85	79	76	62	78
Inter-regional %	15	21	24	38	22
Location:					
Domestic %	n/a	97	96	91	93
International %	n/a	3	4	9	7

* *Mid-Age* is the percentage of visitors aged 30/31 - 49/50 (Victoria aged 35 - 54).

** *Upper Income* is the percentage of visitors in the top third of income brackets.

Within region are visitors from within the region. *Inter-regional* are visitors from outside the region or state (including overseas). *International* are international visitors only. For the *Barossa Festival*, the region is South Australia, for *Canberra wineries* the region is Australian Capital Territory and New South Wales.

(Source: adapted from Johnson, 1998; Mitchell *et al.*, 2000)
(Source 1: Texas wineries - Dodd, 1995; Dodd and Bigotte, 1995, 1997)
(Source 2: Victoria wineries - Maddern and Golledge, 1996)
(Source 3: Canberra wineries - Macionis, 1997)
(Source 4: Augusta- Margaret River wineries - Morris and King, 1997a)
(Source 5: Barossa Festival - Tourism South Australia, 2001)

Again from the VWTC research, higher than average (for the sample) first time visitation came from:

- younger groups (18 - 24 years, 23%) (25 - 29 years, 20%);
- infrequent wine drinkers (25%);

- people with only basic wine knowledge (18%);
- people on longer trips (26%) and
- "blue collar workers" (19%).

(Maddern and Golledge, 1996).

This same cellar door survey research also revealed:

- that the middle-aged segments were the most frequent visitors (35 - 44 years, 26%) (45 - 54 years, 22%);
- fewer visitors were in the younger category (18 - 24 years, 7%);
- slightly more were in an older middle-aged category (55 -64 years , 12%);
- very few in the older age group (65 >, 5%) and
- by gender - males (48%); females (52%) of the sample.

(Maddern and Golledge, 1996).

Table 5.4 Visitor demographics: New Zealand venues

Demographic	New Zealand Wineries (producer)	New Zealand Wineries (consumer)	West Auckland Wineries (consumer)
Male % n	50	46	n/a
Female %	50	54	n/a
Mid-Age* %	24	46	41
Upper Income ** %	n/a	41	66
Trip Originated			
Within region %	n/a	38	80
Inter-regional %	n/a	62	20
Location:			
Domestic %	82	74	92
International %	18	26	8

* Mid-Age is the percentage of visitors aged 30/31 - 49/50.

** Upper Income is the percentage of visitors in the top third of income brackets. West Auckland wineries income inferred from occupational status.

Within region are visitors from within the region. *Inter-regional* are visitors from outside the region or state (including overseas). *International* are international visitors only. For *West Auckland. wineries* the region is Auckland.

(Source: adapted from Johnson, 1998; Mitchell *et al.*, 2000)

(Source 1 - New Zealand (producer), Johnson, 1998)

(Source 2 - New Zealand (consumer), Longo, 1999)

(Source 3 - West Auckland (consumer), Beverland *et al.*, 1998a,b)

Hall and Kearsley (2001) and Mitchell and Hall (2000) reported a wide range of reasons presented for visiting a particular wine region. In several regions general holidaying or touring was mentioned by many visitors, while only two regions, Wairarapa (54.7%) and Marlborough (32%) were motivated mainly by wine. Unsurprisingly dining out was the most common other activity while in the region. Other common activities included visiting friends and relatives, visiting art galleries, visiting food markets and picnicking but these varied considerably from region to region. Most visits were with family and friends, although in some wine regions family trips predominate while in others trips with friends were more prevalent (see Table 5.5).

Table 5.5 Nature of regional experience for winery visitors: New Zealand venues

	Reason for Visit (% of cases)		Other Activities (% of cases)			Trip with.... (% of cases)		
Region	**Gen.Hol.**	**Wine**	**Most**	**Second**	**Third**	**Family**	**Friends**	**Alone**
Northland	69.6	3.7	Dining (76.9)	VFR (53.8)	Heritage (53.8)	38.5	23.1	34.6
Auckland	14.6	9.1	Dining (73.2)	VFR (54.9)	Picnic (40.8)	48.0	18.4	27.6
Bay of Plenty	53.7	4.1	Dining (76.6)	VFR (42.6)	Picnic (40.4)	36.5	38.5	23.1
Gisborne *	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
Hawke's Bay	37.1	16.3	Dining (84.4)	Art Gal. (52.5)	Food (35.5)	16.2	49.2	18.2
Wairarapa	23.2	54.7	Dining (75.0)	Art Gal. (45.3)	Event (26.6)	18.5	69.2	10.8
Nelson	42.4	9.8	Dining (76.2)	Art Gal. (71.3)	Food (36.6)	29.5	42.9	12.4
Marlborough	34.6	32.2	Dining (81.4)	Art Gal. (42.2)	Outdoor (33.7)	18.8	46.8	22.9
Canterbury **	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
Central Otago	62.2	13.1	Dining (84.4)	Art Gal. (50.6)	Food (44.1)	19.8	50.7	23.8
All Regions	45.5	18.8	Dining (80.9)	Art Gal. (47.9)	Food (34.5)	21.3	48.4	21.4

* Data not available

** Insufficient responses

Gen. Hol. = percentage of those stating a main reason for visit other than to specifically visit the winery being surveyed (n=853) that stated General touring/General holiday.

Wine = those stating the winery being surveyed or wineries generally (n=1019).

Art Gal. = art galleries.

VFR = visiting friends and relatives.

Heritage = heritage attractions.

Food = food markets.

Outdoor = outdoor activities.

(Source: Hall and Kearsley, 2001; Mitchell and Hall, 2000)

5.3.1 Socioeconomic Factors and Educational Level

Various studies have indicated that wine tourists (as with wine consumers generally) are likely to have higher incomes, higher levels of education and be engaged in more professional or managerial occupations than the population generally (Getz, 2000). In his Texas study Dodd (1995) concluded that winery visitors in Texas reflected the general population of American wine consumers, but were considerably different from the general Texas population. Winery visitors were much more likely to be highly educated and have higher household income. It was also found that although they were mostly knowledgeable to some extent about wine that income was one of the best predictors of wine consumption (Dodd and Bigotte, 1997).

In South Australia the South Australian Tourism Commission (1997) concluded that the most likely domestic tourists to visit wineries were those aged 40-60 years, couples with no children and those with higher education and incomes and working in professional occupations. People in those categories with children face an impediment to winery visits, and are less likely to attend. For example families with children were not well represented in the Margaret River sample. The majority of survey respondents in Margaret River were well educated professionals aged 25 - 64 years (Morris and King, 1997). It can be concluded that wine tourists are more likely to be travelling individually or in small groups of family and friends and that it was unlikely that "high-yield" wine tourists will be tourists on cheap package deals (Getz, 2000).

5.3.2 Geographic Factors

Visitors to wine regions will be either local, regional, inter-regional or international in origin. According to Dodd (1995) of visitors to six wineries in Texas 75% were in-state, 43% lived within 30 miles (50 km) of the winery and 15% were inter-state (see Table 5.3). Higher levels of visitation by international tourists may occur at some destinations (see Tables 5.3, 5.4). Such geographic data can vary considerably by study. For example research by the Victoria Wineries Tourism Council (Fuller, 1997) found that 90% of visitors were domestic (65% from within Victoria and 25% were inter-state) and 10% international, while Maddern and Golledge found 97% of visitors to Victoria's wineries were domestic and only 3% international (see Table 5.3).

Both Machin (2000) and Mitchell and Hall (2000) reported the existence of large regional variations in the origin of wine tourists. The proximity of a large city to a particular wine region influenced the proportionality of inter-regional visitation compared to regional visitation. Within New Zealand's wine regions a comparison of inter-regional visitors ranged from just 22.8% of visitors in the case of Auckland to 92.5% in Central Otago. In the case of international visitation the range varied from nil in the Bay of Plenty wine region to 23.5% in Marlborough. A wide range of variation in regional length of stay also existed, with short stays in the Wairarapa (adjacent to Wellington) to a predominance of stays of over one week in the more remote Northland (see Table 5.6).

Table 5.6 Trip characteristics of inter-regional winery visitors - New Zealand venues

	Origin of visitor (% of cases: n = 1043)			Length of stay (% of cases: n = 720)				
Region	**Within region**	**Outside region**	**Inter-national**	**Day trip**	**1 – 2 days**	**3 – 7 days**	**1 - 2 weeks**	**>2 weeks**
Northland	19.2	80.8	11.5	0	0	38.9	50.0	11.1
Auckland	77.2	22.8	10.9	5.3	15.8	47.7	21.1	10.5
Bay of Plenty	22.9	77.1	0	0	37.5	46.9	12.5	3.1
Gisborne *	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
Hawke's Bay	11.8	88.2	15.3	0	36.3	55.8	7.1	0.9
Wairarapa	9.2	91.8	9.2	59.6	28.8	11.5	0	0
Nelson	31.1	68.9	1.9	0	10.9	67.2	15.6	6.3
Marlborough	8.9	91.1	23.5	8.4	29.9	50.0	8.4	3.2
Canterbury **	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
Central Otago	7.5	92.5	19.2	4.5	20.0	63.0	12.1	0.4
All Regions	18.4	81.6	15.3	7.9	24.6	54.0	11.1	2.4

* Data not available
** Insufficient responses
(Source: Hall and Kearsley, 2001; Mitchell and Hall, 2000)

5.4 Internal Influences on Decision Making

As with external influences internal factors also play a role in the consumer decision making process. Again these are also used to target population sub-groups during the market segmentation process. In the case of wine tourists such factors are motivations, wine knowledge, wine experience and other psychographic attributes such as beliefs, values, interests and lifestyles (Mitchell *et al.*, 2000; Getz, 2000).

5.4.0 Motivations

The hierarchy of needs pyramid of Maslow (1954) forms the basis of modern motivational theory. Applying this to tourism Ramumbo (cited in Burkadt and Medlick, 1974, p. 67), divided tourism related motivators into:

- physical motivators;
- cultural motivators;
- interpersonal motivators and
- status and prestige motivators.

Motivations are the psychological influences affecting individuals' choices. Generally more than one motivator influences consumer behaviour at any one time (Middleton and Clarke, 2001, Crompton, 1979).

In the case of consumer behaviour in wine tourism, the two main groups of motivators identified are push (internal) and pull (external) factors (Mitchell *et al.*, 2000). From an earlier study in Italy, Pavan (1994) found that 60% of winery visitors came to a winery to taste and buy (pull factors). Research has found that motivating factors may vary considerably by both country and region (Getz, 2000; Mitchell *et al.*, 2000). For example Choisy (1996), found that of visitors to Burgundy 45% of visitors were motivated by both food and wine, whereas in Bordeaux, food and wine ranked only fourth highest in terms of visitor motivations. Motivators may also be somewhat superficial. For example, research conducted in the Augusta - Margaret River area of Western Australia (Morris and King, 1997) found that tasting and buying wine, as in other studies, were the principal motives for visiting wineries, although 20% of visitors did not in fact make a purchase and 18% were found to be irregular purchasers of wine generally.

Table 5.7 ranks various motivating factors (distinguishing between push (internal) and pull (external) factors) for five studies of which three were based on consumer surveys and two on winery surveys.

As well as the superficiality of some motives, researchers also argue that

Table 5.7 Ranking of motivators for winery visitors

Motivator External = E Internal = I	Victoria n= 1552 (consumer)	S. Australia n = 600 (consumer)	Canberra* n = 85 (consumer)	Canberra n= 13 (producer)	New Zealand n = 82 (producer)
Tasting wine (E)	1	1	1	1=	1
Purchasing wine (E)	2	2	2	1=	2
A day out (-)	-	-	3	7	3
Socialising with friends/ family(I)	3	3	-	6	7
Learning about wine (I)	4	6	6	5	4
Relaxation (I)	-	-	-	3	5
Winery/vineyard tour (E)	6	7	-	9	6
Meeting the wine-maker (I)	7	-	5	4	8
Visit winery restaurant/ cafe (E)	5	5	-	-	11
Picnic/Barbecue (E)	9	8	-	10	10
Entertainment/ other attractions (-)	8	9	-	-	-
Rural setting (E)	-	4	4	-	-

(Source: after Mitchell *et al.*, 2000)
(Source 1: Victoria - Maddern and Golledge, 1996)
(Source 2: South Australia - South Australian Tourism Commission, 2001)
(Source 3: Canberra* - Macionis, 1994)
(Source 4: Canberra - Macionis, 1996)
(Source 5: New Zealand - Johnson, 1998)

fundamental motives may also exist and that respondents effectively translate the more superficial motives as listed in a particular survey to such underlying motives (Getz, 2000; Mitchell *et al.*, 2000). For example, according to Mitchell *et al.* (2000), some of the internal (push) motives included in Table 5.7 are based on the values, attitudes and beliefs of the wine tourist; visitors motivated by *meeting the wine-maker* were thought by Mitchell *et al.* (2000) to be concerned with things such as the "believability and passion" associated with wine-making, wine and its interpretation. Cohen (1983) argued that such deep-seated motives may relate to questions such as "authenticity". Mitchell *et al.*, (2000) gives a further example of the motives of a *day out* and of *relaxation* and believes that these represent an underlying motive of a need to "escape" from an urban environment.

Other motivations related solely to the consumption of wine may also exist. For example a health motive may exist, in that wine is often seen as a natural healthy product, with much literature over the last decade devoted to proclaiming its health benefits (Klatsky, 2003; Chéze, *et al.*, 2001; Watkins, 1997; Perdue, 1992).

Although motivational data provides a remarkably effective basis for wineries to target potential visitors, additional visitor market research is needed to ascertain an accurate profile of wine tourists, wine tourism market segments and relationships with other forms of tourism. According to both Hall *et al.* (2000a) and Machin (2000), results of New Zealand research point to significant differences in winery visitor characteristics among countries and as between wine regions within a particular country. As well as the various motivators discussed, a level of wine knowledge and past experience with wine are also thought to be important characteristics of wine tourists.

5.4.1 Wine Education and Past Wine Experience

Hills (1998) argues that in order to increase sales of premium wines that wine education assists by developing knowledgeable and informed consumers. Accordingly in the countries of the New World, without established traditions of wine drinking, wine tourism can be used to introduce wine to new consumers as well as increasing wine knowledge generally (Mitchell *et al.*, 2000).

Table 5.8 Level of wine knowledge

Level of wine knowledge	Victoria (consumer) n= 1552	Augusta-Margaret River (consumer) n = 600	New Zealand* (supplier) n = 82	Canberra (consumer) n= 85	New Zealand (consumer) n = 103
	%	%	%	%	%
No knowledge	10<			10<	
Basic knowledge	40	48	27	62	40
Intermediate knowledge	55	52	80	31	51
Advanced knowledge	10<		17	7<	10<

*** Respondents selected more than one category**

* Total does not equate 100% as 16% of respondents selected more than one choice
(Source: after Hall and Mitchell, 2001).
(Source 1: Victoria - Maddern and Golledge, 1996).
(Source 2: Augusta-Margaret River - (Morris and King, 1997).
(Source 3: New Zealand (supplier) - Johnson, 1998).
(Source 4: Canberra - Macionis, 1996).
(Source 5: New Zealand (consumer) - Longo, 1999).

Mitchell (in progress) also suggests that for many, wine tasting and learning about wine is a way of "risk minimisation"; by increasing both knowledge and experience the informed consumer will thus feel better able to make more informed choices when it comes to tasting and choosing wine for purchase. Table 5.8 shows the level of wine knowledge in five studies in both Australia and New Zealand. In all studies (one supplier and four consumer) most respondents were reported to have either a basic or intermediate level of wine knowledge.

Although probably related to wine knowledge, previous wine experience is also considered to be a relevant factor when considering the attributes of wine tourists (Getz, 2000). In the case of Texas wineries Dodd (1995), found that visitors consumed an average of 3.55 bottles per month and spent US $30 on wine purchases. Most of their wine (69%) was bought at grocery or liquor stores, 22% from restaurants, 8% from wineries while mail order sales accounted for only 1.3%. In the Texas research, age and income were the only demographic variables that explained major differences in spending amongst consumers at wineries. Older visitors had higher incomes and spent more money in total but less per bottle. They rated wine attributes higher in importance, while younger respondents were more concerned about price.

5.4.2 Psychographic Attributes: Attitudes, Beliefs, Values, Interests and Lifestyles

Psychographic attributes, also known as personality traits, are used to denote the type of person an individual is. They are also thought to strongly influence the types of product purchased and as such in addition to demographic, socioeconomic and geographic factors are frequently used during the market segmentation process (Middleton and Clarke, 2001; Fletcher, 1995; Vanhove, 1995; Teare *et al.*, 1994). Psychographic segmentation based upon attitudes, interests, beliefs, lifestyles and values of the consumer is usually divided into general typologies segmentation and product specific segmentation (Swarbrooke and Horner, 2001; Holloway and Robinson, 1995).

Plog (1974) developed a general psychographic classification of tourists. The extreme classifications of "psychocentrics" (less adventurous, inward looking) and "allocentrics" (outward looking, seeking adventure) were separated by intermediate categories of "near-psychocentrics", "mod-centrics" and "near-allcentrics" exhibiting variations of the extreme characteristics. As a result of further research Plog (1995) later amended his original classification and defined the two extremes as "dependables" (structured, stable and predictable lifestyle) and "venturers" (adventurous, explorative lifestyle). Populations were found to be normally distributed along this scale. Plog (1995) also added a scale of "energy" versus "lethargy", thereby creating four quadrants within which psychographic characteristics of individuals could be plotted.

Within wine tourism similar psychographic methods of market segmentation have also been utilised. For example Australian research (1996/97) in which tourists are segmented on the basis of values and lifestyles found that members of the two segments "visible achievers" (11%) "socially aware " (10%) had the highest participation rates in wine tourism activities. These segments are characterised by married couples, without dependents and higher than average incomes (Roy Morgan Holiday Tracking Research, 1996). A number of writers feel that in the case of wine tourism, that psychographic variables can often be better predictors of behaviour than demographic, geographic and socioeconomic factors (Getz, 2000). The creation of typologies of wine tourists is based upon market segmentation using demographic, socioeconomic, geographic and psychographic characteristics as outlined above.

5.5 Typologies of Wine Tourists

Commencing with Cohen (1972) and refined by Plog (1995; 1974) the creation of typologies for groups of tourists covering both characteristics and behaviours was developed firstly by academics. More latterly practitioners, for the purposes of market segmentation, have utilised the same techniques (Swarbrooke and Horner, 2001; Vanhove, 1995; Fletcher, 1995). Typologies normally include both demographic and psychographic characteristics with considerable emphasis upon "lifestyle" (Middleton and Clarke, 2001).

According to Macionis (1999) and Macionis and Cambourne (1998), such hackneyed descriptions as "wine connoisseurs" (Edwards, 1989, p. 15), "wine buffs who seek out trendy, exclusive or almost unobtainable wines direct from the producer" (McKenzie, 1986, p. 57), "mobile drunks" (Spawton 1986, p. 57) and passing tourists who think that a "winery crawl" is just a good holiday (McKinna, 1997, p. 85) were originally used to describe wine tourists. Since then various studies of wine tourism consumers have led to the development of a number of typologies. These assist understanding in a meaningful way as to whom the wine tourist actually is (Hall *et al.*, 2000d; Getz, 2000).

Macionis and Cambourne (1998) upon analysing research on the characteristics of wine tourists described the typology of a typical (Canberra) wine tourist as:

- mature (30 - 50 years old);
- regular consumer of wine;
- from within the State or region;
- employed full time;
- of moderate to high income level;
- has an intermediate to advanced knowledge of wine and
- visits wineries/wine regions several times each year.

Getz (2000) derived a profile of a "dedicated" wine tourist as:

- most likely to be middle-aged, of higher income and living in cities;
- most are baby boomers (born 1947 - 1963);
- most are likely to be local/regional in origin and
- of international wine tourists the origin countries are likely to be European (especially the United Kingdom), North American, and Australians while Asia presents growth opportunities.

From a 2000 cellar door survey (n=600) the South Australian Tourism Commission developed three typologies of typical wine tourists (South Australia) as follows:

- ***Wine-focused*** - Members of this group had wine tasting and purchasing as their central focus. They were somewhat interested in meeting local wine--makers, had little interest in other shopping, history, heritage and natural attractions. Members of this group were more likely to be male, aged 25-34, with a professional occupation. Mostly they were "day-trippers" living within South Australia.
- ***Browsers*** - Members of this group had a wide range of interests including, history, heritage, local produce, quality restaurants, natural attractions, art

galleries, antiques and other shopping. Entertaining visitors was moderately important as was attending other events in the region. They were slightly more likely to be female. Wine tasting and purchasing although important, was the same as other members of the sample.

- ***Time out*** - Although interested in tasting and purchasing wine at cellar doors, this group was most interested in spending quality time with their partners. They were less likely to be entertaining visitors or to be interested in meeting local wine-makers. They were more likely to stay over night in the region and were slightly older. They were more likely to be couples with children and a higher percentage were resident interstate.

(South Australian Tourism Commission, 2001).

5.6 Purchase Decisions

Wine tourists can also be segmented on the basis of their consumption patterns and spending levels. Destinations and wineries need to determine attributes (including origins) of "high yield" visitors - those who return frequently and spend the most. Presently little information is available on either yield or consumption patterns. This is true in the case of local, regional, inter-regional and international visitors. In the case of the latter, "country of origin" assists in targeting strategies (Getz, 2000). Morris and King (1997) found that individual visitors, spend more on average than larger tour groups which may consist of many general interest sightseers.

Research by the South Australian Tourism Commission (1997) concluded that although there is a significant positive co-relationship between winery visitation and wine purchases, almost one quarter of the Margaret River sample spent nothing at the winery. However 16%, inclusive of some professional buyers spent in excess of AU$200 (see Table 5.9) Factors effecting wine purchases were examined revealing that taste was of most significance, followed by wine quality, price, staff knowledge and service quality (see Section 6.4 of Chapter 6). In addition to purchasing wine 59% of visitors patronised winery restaurants/cafes while others purchased local products including arts (11%), crafts (12%) and souvenirs (17%) (Getz, 2000).

Table 5.9 Margaret River - wine expenditure at the cellar door

Expenditure on Wine $	% of Respondents
$50 or less	25%
$51 - $100	19%
$101 - $200	15%
$201 >	16%

* Total does not equate 100% as 25% made no purchase
(Source: Augusta-Margaret River - (Morris and King, 1997).

In his study of six Texas wineries Dodd (1995) found that visitors, during the winery visit, spent US$23.41 on average of which 78% was for wine and 22% for other merchandise. Most visitors (61%) had not made previous purchases from the winery at which they were interviewed. Of the wine purchased 20% was for gifts. Another interesting conclusion from the Texas research was that older visitors (who are generally wealthier) spent more on wine than younger visitors but paid less per bottle. Overall service and price were rated higher by younger visitors as factors influencing wine purchases at wineries (Dodd and Bigotte, 1997).

Although many methods of market segmentation are focused on products, Dodd and Bigotte (1995) found that there were no significant differences between visitors who purchased and those who did not purchase wine at the cellar door on the basis of their normal consumption of wine and the amount they spend on it. For the wine tourism consumer the perceptions held and the decision making processes employed depend largely upon the availability of information.

5.7 Information Sources

Visits to wineries may be planned in advance or they may be spontaneous. In either case differing information sources may be used. A consumer survey for visitors to six Texas wineries (Dodd, 1995), found that most winery visits were planned (88%) and only 12% were spontaneous. Victoria Wineries Tourism Council (1997) found that 52% of surveyed visitors had planned to visit wineries in the region, where they were interviewed, whereas 23% said their visit was spontaneous. Another 24% had planned to visit the specific winery where they were contacted. The same study of Victorian wineries, found that information for wine tourists was found from the following sources:

- family or friends - 32% (especially for those aged 18 -19 years old);
- wine regions of Australia brochure - 30%;
- brochure from Tourism Victoria - 22%;
- previous experience - 10%;
- auto club guides - 7%;
- newspapers - 7%;
- magazines - 3%
- and other including signage - 10%.

However, Welsh (1994) in an analysis of marketing factors contributing to success amongst small businesses in the Australian wine industry reported that wine makers utilise various print media "but without commitment". With specific reference to tourism publications he noted (p. 213) that 71.7% of his respondents agreed or strongly agreed with the statement that " I am not convinced that advertising in tourist magazines actually attracts custom" . Welsh (1994) also noted that public relations activities such as hosting journalists was not a widespread practice amongst winemakers in his study.

Dodd (1998) reported that in the case of visitors to Texas wineries that the following information sources (in descending order of importance) were used by visitors:

- "word of mouth" recommendations from family and friends;
- previous exposure to the particular winery's label;
- newspaper or magazine articles, information or advertising;
- brochures;
- previous visits to the winery;
- billboards and
- local visitor bureau.

Dodd (1998) also found that the information sources used varied with residential distance from the winery (Example: people living close-by used "previous visits to the winery" as the main information source, while people over 30 miles (50 km) distant used mainly "brochures".

Although adequate signage is important for both planned and spontaneous visitation, in the case of the latter it is clearly critical. "Word of mouth" recommendations from satisfied former visitors are extremely important as an information source, while brochures/maps and other forms of advertising provide valuable information to potential visitors (Getz, 2000). Available market segmentations tend to be product-focused. Such a product-focused approach ignores the experiential and recreational motivations that may be of significance to wine tourists (Macionis, 1997).

5.8 Recreational and Experiential Aspects of Wine Tourism

To date the discussion has adopted the traditional "logical" and "calculated" view of consumer behaviour. However it has long been recognised by some theorists that certain types of goods and services are both recreational and hedonistic by their very nature (Holbrook and Hirschman, 1982). Wine, recreational products/services and pleasure travel are examples of these. In such cases logical decision making, as earlier outlined, is not altogether an appropriate method of analysis. The so-called "lifestyle" magazines (Examples: *Cuisine*, *Decanter*) promote this hedonistic and idyllic form of wine, food and travel. In the case of wine tourism some theorists have recommended an experiential perspective. Dodd and Gustafson (1997) have used aspects of this approach with regard to characteristics of visitors and the influence of winery attributes and staff members on their behaviour (see Section 6.4.4 of Chapter 6). A limited number of studies have obtained an inferred positive co-relationship between "lifestyle' magazines read and wine tourism participation (Longo, 1999; Maddern and Golledge, 1996). The current approach to the recreational and hedonistic aspects of wine tourism is to include them as an adjunct to the traditional analytical model of consumer behaviour (Mitchell, in progress, Mitchell *et al.*, 2000).

5.9 Temporal and Spatial Issues

Commencing with Clawson and Knetsch (1996) it has generally been acknowledged that the five transitory steps in the tourism experience are:

- pre-visit (anticipation);
- travelling to destination;
- destination/site visit;
- travelling from destination and
- post-visit (reminiscence).

With the possible exception of Pearce (1982), in spite of the recognition that an individual tourist encounters all of these stages in the course of any touristic experience, most researchers have tended to concentrate their empirical studies at one level only.

Corresponding to these temporal issues, at a spatial level, tourism experiences in a particular destinational region often depend upon interaction with a range of attractions. In the case of wine tourism research into both temporal and spatial issues has mostly been ignored, although Johnson (1998) and Hall (1996) have investigated destinational linkages (see Chapter 7) and Mitchell (in progress) (following on from King and Morris, 1999) is currently considering temporal issues. Post-visit and reminiscence related to previous wine tourism experiences are components of importance to wineries as these factors relate to future visits, direct purchasing decisions at other venues, future brand-recognition in a more general sense and perceptions/expectations (see Chapter 6 and Chapter 7).

5.10 Perceptions and Expectations Held by Wine Tourists

According to Middleton and Clarke (2001, p. 80):

> *Perception* is the term used to explain the way individuals select and organise the mass of information they are exposed to and *perception* is a function of attitudes, motivations, experience and learning especially related to previous purchase.

In this sense, perception is a filtering process accentuating specific parts and down-playing others. Thus for an individual, particular perceptions change over time, not only as a result of changing inputs but also as a function of both the learning process and as a result of exposure to reference groups (Goeldner and Ritchie, 2003; Middleton and Clarke, 2001; Swarbrooke and Horner, 1999; Teare *et al.*, 1994).

Expectations were defined by Olson and Dover (1976, p. 51) as:

> ..the perceived likelihood that a product (or service) possesses a certain characteristic or attribute, or will lead to a particular event or outcome.

In this context expectations can best be regarded as the likely outcome of a purchase decision, derived from the perception that has been established after consideration of all input factors (Goeldner and Ritchie, 2003; Middleton and Clarke, 2001).

From the wine tourism market model (see Figure 4.0 of Chapter 4) perceptions are the final tier of the purchase decision process for the various potential consumer participants, the aggregate of which creates the demand side of the model. Such perceptions create a level of expectation within the participants which may or may not be fulfilled by the wine tourism experience at either the winery (see Chapter 6) or destinational levels (see Chapter 7).

5.11 Summary

Theoretical generic marketing models so far developed, generally lack empirical verification even though consumer behaviour, which the models seek to emulate, is a cornerstone of modern marketing theory. They do however provide a basis for the market segmentation of targeted population sub-groups and as such can provide a framework for the identification of potential wine tourism consumers.

Perceptions are effectively "filters", creating expectations and combining all of the various influences on decision making, that result in consumer purchase decisions. The sum total of these create the aggregate demand side of the wine tourism market model (see Figure 4.0 of Chapter 4). The inputs into this decision making process are divisible into external and internal influences although these are modified by informational sources as well as by past experiences.

Typologies, being population subgroups, are derived from measurable wine tourist attributes and represent the target markets in the market segmentation process. External influences include demographic, socioeconomic and geographic factors while internal influences include motivations as well as the psychographic factors of attitudes, beliefs, values, interests and lifestyles.

Because both wine and tourism are regarded as hedonistic products, consumer purchase decisions may stray beyond the confines of logical analysis. Traditionally, temporal and spatial components have to the present time been largely overlooked by researchers, even though these are clearly part of the wine tourism experience. Studies currently available are restricted by number, sample size and geographical diversity. Nevertheless in spite of these limitations results of research to date suggest that overall patterns of consistency exist.

Commencing with the wine tourism market model (see Figure 4.0 of Chapter 4), this chapter has mainly discussed characteristics of wine tourism consumers. A corollary to this raises questions as to why wine consumers (or people generally) choose not to visit wineries. Although this is an unresearched problem, the two chapters following examine this perspective as part of their overall discussion. While Chapter 6 examines the supply side of the wine tourism market model (see Figure 4.0 of Chapter 4) from the point of view of individual wineries, Chapter 7 discusses wine tourism destinational regions as a whole, examining cross linkages, alliances and the clustering of inter-dependent operators of tourism attractions.

Chapter six: The Supply Side of Wine Tourism

6.0 Introduction

This present chapter examines the supply side of the wine tourism market model from the perspective of individual wineries (see Figure 4.0 of Chapter 4). Research from the viewpoint of wineries is largely concerned with the advantages and disadvantages of wine tourism, marketing, availability of visitor facilities and the quality of winery attributes. Research is predominantly Australasian, although papers from France, Canada and the United States are also included. The advantages and disadvantages of wine tourism from the supply-side viewpoint of the wine tourism market model (see Figure 4.0 of Chapter 4) includes various aspects of revenue, profitability, opportunity costs, customer/market and product intelligence. Researchers generally consider that wine tourism is perhaps best seen as a component of an overall integrated winery operational strategy rather than a sole objective.

Again from the wine tourism market model (see Figure 4.0 of Chapter 4), the image of individual wineries is created from consideration of the quality and availability of visitor facilities and winery attributes together with the use of appropriate marketing and promotion which is important in an industry seen as largely production oriented. Visitor facilities are either physical or service-related while a range of winery attributes are categorised into winery aesthetics, wine attributes, service attributes and price. Not only do differing demographic groupings perceive particular attributes in different ways but also attributes can be correlated to wine purchases, accessory purchases and visitor attitudes generally. Marketing and promotion as part of image creation is also a component of brand building, while the marketing mix used may employ newer technological advances as well as the more common promotional methodologies. Finally the critical success factors important for a successful wine tourism winery operation have been distilled from participant discussions at two major wine tourism conferences.

6.1 Wine Tourism Producer Research

Table 6.0 Wine tourism producer research - Australia and New Zealand

Researcher	Year	Country	Summary of Research
Spawton	1986 1991	Australia	Advantages and disadvantages of wine tourism from the perspective of individual wineries.
Deves	1995	Australia	Winery facilities availability.
Macionis	1996	Australia	Relationship between winery size and significance of wine tourism
Hall	1996	NZ	Relationship between winery size and significance of wine tourism. Winery attributes and facilities availability.
Reilly	1996	Australia	Advantages and disadvantages of wine tourism from the point of view of wineries.
Fuller	1997	Australia	Relationship between winery size and significance of wine tourism. Advantages and disadavantages from the view-point of individual wineries.
Beverland	1998	NZ	Advantages and disadvantages of wine tourism from the point of view of wineries.
Johnson	1998	NZ	Significance of cellar door sales in differing regions. Winery facilities availability.
Bigsby, Trought Lambie and Bicknell,	1998	NZ	Economic significance of cellar door sales for individual wineries in Marlborough.
King and Morris	1999	Australia	Advantages and disadvantages of wine tourism from the point of view of individual wineries.
Leiper and Carlson	1999	Australia	Advantages and disadvantages of wine tourism from the point of view of wineries.
Aplin	1999	Australia NZ	Advantages and disadvantages of wine tourism from the point of view of wineries.
Ali-Knight and Charters	1999a 1999b	Australia Australia	Role of education of consumers in wine tourism and its affect on wine purchases by visitors.
O'Neill and Charters	2000	Australia	Service quality at the cellar door.
Macionis and Cambourne	2000	Australia	Advantages and disadvantages of wine tourism from the point of view of individual wineries.
Jago and Issaverdis	2001	Australia	Accreditation of service quality standards
O'Neill *et al.*	2002	Australia	Service quality at the cellar door.
Fraser	2003	NZ	Advantages and disadvantages of wine tourism from the point of view of individual wineries.

Tables 6.0 and 6.1 non-exhaustively lists major items of wine tourism research currently available from the view-point of individual wineries. Reference is made throughout this chapter to these various studies. Commencing in the late 1980's and increasing in volume during the 1990's much of the research is concerned with:

- the availability of wine tourism facilities at wineries in specific regions;

- the attributes of wineries;
- marketing, promotion, image building and branding;
- attributes as perceived by differing demographic groups of visitors and
- the overall significance of wine tourism from the perspective of individual wineries and its relationship with winery size.

Table 6.1 Wine tourism producer research - France, USA, Canada, World-wide

Researcher	Year	Country	Summary of Research
Folwell and Grassel	1989	USA	Winery attributes and facilities available. Advantages and disadvantages of wine tourism from the perspective of individual wineries.
Dodd	1994	USA	Winery attributes. Advantages and disadvantages of wine tourism from the perspective of individual wineries.
Kendziorek	1994	USA	Advantages and disadvantages of wine tourism from the individual perspective of wineries.
Dodd	1995	USA	Advantages and disadvantages of wine tourism from the perspective of individual wineries.
Dodd and Biggotte	1995	USA	Relationship between winery size and significance of wine tourism. Winery attributes and facilities.
Choisy	1996	France	Advantages and disadvantages of wine tourism from a winery point of view.
Saunders	1996	Canada	Advantages and disadvantages of wine tourism from an individual winery's point of view.
Dodd and Biggotte	1997	USA	Perceptual differences in winery attributes as observed by differing demographic groupings.
Dodd and Gustafson	1997	USA	Winery attributes and available facilities.
Boddy	1998	Canada	Advantages and disadvantages of wine tourism from the perspective of an individual winery.
Anderson	1999	USA	Wine sales over the Internet - including difficulties.
Hashimoto and Telfer	1999	Canada	Unique positioning in marketing for wine tourism.
Richardson	2002	World	Internet web pages developed for use by wineries.

Much of the research involves an analysis of primary data, although in some of the later studies secondary data (derived from earlier studies or state/ regional/national statistics) is used and re-analysed based on differing objectives.

6.2 Advantages and Disadvantages of Engaging in Wine Tourism

The obvious question arises as to why some wineries do not in fact engage in wine tourism. The answer to this follows on from the Drucker (1995) business specialisation argument (see Section 4.3 of Chapter 4). Many winery owners are product oriented mostly or wholly concerned about the creation of quality wines (Macionis, 1997). For such individuals, tourism is regarded as an unwanted intrusion and is not at all recognised for its marketing potential.

Fraser (2003), quoted on a Radio New Zealand *Midday Report* concerning a paper presented at a Lincoln University tourism conference on a survey of 350 wineries (50% response rate), in which many respondents said they felt it best "to concentrate on building up their wine quality than to worry about committing infrastructure to wine tourism such as parking areas, restaurants and tasting rooms." They felt that "the effort wasn't worth it for smaller wineries although larger ones could gain from brand promotion to wine tourists."

Beverland (1998) argued that real growth for a winery is likely to come from mass distribution channels and that too much concentration on tourism is a distraction. Leiper and Carlsen (1999) support this contention while Macionis and Cambourne, (2000, p. 228) refutes this argument as:

> .. it is precisely this structural dichotomy [both wine tourism and sales through normal outlets] that has made wine tourism an important component of the business success of many small regional wineries in Australia.

According to Fuller (1997, p. 35) citing the CEO of the Victorian Wineries Tourism Council:

> There are a number of perspectives to wine tourism. For small wineries it provides cash flow and assists them in achieving a better sales mix at a higher price or yield. It also allows them to successfully brand their products and wineries. For larger wineries the effect is different. While wine tourism is an economic necessity for smaller wineries, large wineries often support cellar door activities as a publicity or public relations commitment. There are also big benefits for the State as a whole, in terms of regional employment and providing a diversity of tourist products for the region.

To further develop the argument, the Winemakers Federation of Australia Strategy 2025 (1966, p. 7) stated that:

> For many small wineries, especially those with a strong lifestyle business motivation, wine tourism (cellar door visitation) can be the core business function.

Thus for boutique wineries, especially those in evolving or non-established wine-producing regions, wine tourism is commonly an economic requirement which provides cash flow, assists them to achieve a better sales mix with higher margins and provides opportunities to successfully brand their wine products and wineries (Getz, 2000; Getz, 1999).

Various studies have ascertained that the advantages of wine tourism from the perspective of the individual winery are:

- To provide an additional sales outlet. Wine tourism provides an alternative sales outlet over and above normal distribution channels. This is of great importance for smaller wineries who because of lower production volumes may not be able to ensure that there are constant levels of supply for a conventional distribution chain (Aplin, 1999; King and Morris, 1999; Dodd and Bigotte, 1997; Saunders, 1996; Reilly, 1996; Choisy, 1996; Dodd, 1995; Folwell and Grassel, 1989; Spawton, 1986).
- To achieve increased profit margins. By avoiding the conventional supply chain, normal wholesale and retail profit margins are avoided - even though lower prices may be charged at the cellar door than at the retail level for conventional distribution channels (Aplin 1999; Bigsby *et al.*, 1998; Boddy, 1998; Dodd and Bigotte, 1995; Dodd, 1995; Kendziorek, 1994).
- To build loyalty and brand recognition. This is achieved by establishing direct links between producer and consumer. Additionally other branded merchandise (Example: clothing) may be sold at winery outlets (Dodd and Bigotte, 1995; Dodd, 1995).
- To provide increased consumer exposure to the wine produced and greater opportunities to sample it (Dodd and Bigotte, 1995; Dodd, 1995).
- To provide educational opportunities for wine consumers. Visits to wineries create both awareness and appreciation of wine and the wine industry generally, resulting in potential increases in overall wine consumption (Ali-Knight and Charters, 1999a; Ali-Knight and Charters, 1999b; Dodd and Bigotte, 1995; Dodd, 1995)
- To provide marketing intelligence on products by providing an opportunity for customers to investigate new products at little or no cost. Wine producers can procure immediate and helpful feedback of consumer reaction to their existing product range, as well as obtaining customer responses to recently developed products (Dodd, 1995; Dodd and Biggotte, 1995).
- To provide marketing intelligence on customers. Visitors to the winery can be added to a database which may then be used as a mailing list to both

inform and target customers (Dodd, 1995; Dodd and Bigotte, 1995).

- To build relationships with customers. Wine tourism provides an opportunity to meet winery staff and to scrutinise the "inner workings" of a wine production facility. This can enhance customer relationships resulting in "word of mouth" recommendations for individual wines and the winery brand name generally (Dodd, 1995; Dodd and Biggotte, 1995).

Research has determined that some of the disadvantages of wine tourism (especially for small wineries) are:

- An increase in costs, both in monetary terms and in time spent. The contentious question of charging tasting fees, to meet some of these additional costs also arises (Dodd, 1995; Dodd and Bigotte, 1995).
- An increase in capital requirements. Appropriate facilities (Examples: tasting room, roading, car-parks, toilets) for hosting visitors may be prohibitively expensive, especially for smaller wineries (Dodd, 1995; Dodd and Biggotte, 1995).
- Opportunity cost constraints - investments in tasting rooms and other wine tourism facilities limits capital availability for alternative investments (Dodd, 1995; Dodd and Bigotte, 1995).
- An inability to substantially increase sales. By concentrating on sales to wine tourists, as the number of visitors a winery can attract is probably finite, if a winery is unable to sell all of its wine stock, it will eventually need to utilise other distribution channels (Dodd, 1995).

Clearly individual wineries must balance out these advantages and disadvantages as applicable to their own particular circumstances. Realistically the wine tourism phenomenon should be seen as a component part of the overall evolution of a particular winery, rather than as an all encompassing strategy (Getz, 2000; Hall, 2000d). The mode by which wine tourism is used as a constituent part of the overall business mix will largely depend on the stage of business development, overall goals, location and target markets (Getz, 2000; Getz, 1999; Hall *et al.*, 2000d; Dodd and Biggotte, 1995).

6.3 Availability of Wine Tourism Facilities and Visitor Services

From the wine tourism market model (see Figure 4.0 of Chapter 4), the range and availability of wine tourism facilities is an important component of a winery's image. Research has found that wineries, offering wine tourism facilities, are more successful when they are sited adjacent to large cities or on well-traversed tourist routes (Hall, 2003; Getz, 2000; Dodd, 1995). Even so these are invariably based in predominantly rural areas. Wine tourism can however still flourish in non-traditional areas:

- Urban wine (and food) events (see Table A.36 of Appendix A).
- Wineries upon which expanding cities have encroached (Examples: Swan Valley, Perth; Henderson/Henderson Valley sub-region of the Auckland Wine Region).
- More commonly in the past where wineries were established to counter "stifling" liquor laws (Example: formerly Village Winery of the Auckland suburb of Mt. Eden held a winemakers license in a "dry" area).
- Wine tourism facilities deliberately based in cities with high levels of tourism visitation, often including "virtual" tours of vineyards and wineries (Examples: Robert Mondovi's and Disney's "wine country experience" in California, National Wine Centre of Adelaide, Vinopolis of London).
- Internet based wineries also offering "virtual" winery/vineyard experiences as well as wine sales (Example: Virtual Vineyards (Hapgood, 1996)).

Research by Reilly (1996) reported that the key facilities, visitor services and other factors for South Australian wineries in descending order of importance were shortness of drive (to the winery), restaurants, special features of the wineries, festivals, accommodation, other tourist activities and other retail opportunities especially arts and crafts.

Tables A.33 and A.34 of Appendix A provides a New Zealand regional breakdown of major wine tourism facilities and visitor services comparing 2003 (Table A.34) with 1995 (Table A.33). Although the provision of wine tourism facilities in New Zealand in 1995 (Example: cellar door sales, 60%) were lower than those of Australia (Example: cellar door sales, 80%) (see Table A.37 of

Appendix A) by 2003 New Zealand wine tourism facilities (Example: cellar door sales, 79%) had increased substantially. In 1995 they were also less than those of the wine producing regions of Washington State (Example: cellar door sales, 72%) (Folwell and Grassel, 1995). The small percentage of wineries with cafes or restaurants in New Zealand is similar to those of Australia (Hall and Kearsley, 2001; Getz, 2000). Other more "exotic" tourist attractions exist in wine regions in both Australia and New Zealand (Example: barrel caves, heritage

Table 6.2 New Zealand visitor services and facilities

Visitor services and facilities	%
General services (Base n = 84)	
Wine tasting	93
Winery tours	57
Vineyard tours	44
Functions	26
Entertainment	20
Conferences	11
Other services	8
Food services (Base n = 84)	
Restaurant	32
Tasting or snack food	21
Accommodation (Base n = 83)	
Villa or luxury apartment	2
Bed and Breakfast	1
Backpackers	1
Farmstay	1
Motel	1

(Source: Johnson, 1998)

buildings, wine museums, pétanque courts) but the number of wineries that run such tourism operations is very limited.

Table 6.2 lists the available facilities and visitor services ascertained by Johnson (1998) in his 1997 New Zealand Wineries Survey. A similar table (A.37 of Appendix A) provides a comparative analysis, by state, for Australia. Besides producing wine for both tasting and purchase, wineries also provide a wide-range of affiliated tourism services and facilities. Of all these services wine tasting is the most widely offered at 93% while 57% offer winery tours and 44% vineyard tours. Picnic/entertainment areas were provided by 53% of the sample. Of the remaining services, including all food-related services these are offered by less than a third of all wineries (Examples: barrel halls 28%, wine caves 10%, wine-making demonstrations 8%). At a low 6% the provision of accommodation facilities is much lower when compared with wine regions in other countries (Hall and Kearsley, 2001; Hall and Johnson, 1997).Various consumer surveys (see Section 5.4.0 of Chapter 5) have determined that winery visitors look not just to taste and buy wine with many wishing to engage in social outings and a rural experience. Such social experiences for visitor groups must be catered for by wineries by the provision of a wide range of activities such as picnic/barbecue facilities, souvenir shopping and active recreation. Although restaurants/cafes and accommodation can be distinct attractions, functions and events will appeal to a more extensive range of visitors (Skinner, 2000; Getz, 2000).

Researchers have reported, that for a winery, the provision of on-site accommodation can provide the benefits of:

- additional sales revenue;
- a year round demand for wine, food and other goods sold on-site;
- a more intensive wine tourism experience for guests;
- consistent levels of cash flow to off-set the peaks and troughs of wine revenue and
- eventually (depending upon the region) to create a market for residential sections, time-shares and units on surplus vineyard land.

The drawbacks of accommodation provision are:

- that guests may disrupt normal vineyard/winery operations;
- the additional capital and operational costs involved and
- a degradation of the rural environment (Examples: inappropriate building design and traffic noise) which is normally enjoyed by day-trippers.

(Getz, 2000; Skinner, 2000; Conway, 1990).

6.4 Winery Attributes

Winery attributes, were originally introduced into the wine tourism literature by Dodd (1994) and Dodd and Gustafson (1997). Such attributes are used by visitors (and winery management) to construct an overall image of a particular winery (see Figure 4.0 of Chapter 4). These and other researchers have attempted to relate visitor perceptions held with present and future buying behaviour as well as repeat visitation (Dodd, 1999; Dodd and Bigotte, 1997). Accordingly, winery attributes directly contribute to all aspects of the wine tourism experience. Attributes can be categorised as winery aesthetics (environment) (Example: cleanliness, winery smells), wine attributes (Examples: taste, aroma), service attributes (Examples: staff knowledge, staff courteousness) and price.

As well as the level of facilities and visitor services offered, Reilly (1996) measured in his South Australian study the attributes most highly valued in descending order of importance as:

- knowledgeable staff;
- wine tastings at no cost;
- lower prices than retail;
- the presence of winemakers and
- unique surroundings.

Both Dodd (1994) and Dodd and Gustafson (1997) researched relationships between perceived winery attributes and attitudes as well as wine purchases and ancillary purchases. From the original 100 or so attributes that were ascertained 17 were finally considered in detail and divided between the four winery attribute categories outlined above.

6.4.0 Winery Aesthetics

Table 6.3 is derived from the Texas winery research of Dodd (1994) and Dodd and Gustafson (1997). There were few relationships between the variables as detailed in the table. With regard to "wine purchases" the attributes of "wine label" and "displays" curiously had a negative relationship. Dodd considered that not-with-standing a well-designed label and although attitudes may be positive but unless visitors are convinced that the wine is of high quality they still will not purchase it. In spite of Joseph (1988) who takes an artistic view-point of wine labels over a number of years, consumers appear unlikely to purchase wine based merely upon the superficiality of label design or on the basis of its written content. Dodd and Gustafson (1997) considers that with regard to the attribute "displays", which exhibits a negative relationship to "wine purchases" but a positive relationship to "accessory purchases", that respondents may be trying to find something good to say about the winery in spite of not enjoying the wine.

Table 6.3 Winery aesthetics - Correlation with attitudes, wine purchases and accessory purchases

Winery aesthetics	Attitudes	Wine purchases	Accessory purchases
Wine label	+	-	0
Cleanliness	0	0	0
Environment	0	0	0
Displays	0	-	+
Winery attractiveness	0	0	0
Winery smells	0	0	0

r = + positive relationship
r = - negative relationship
r = 0 no relationship
(Source: Dodd, 2000)

6.4.1 Wine Attributes

Not only were "wine taste" and "wine quality" both positively related to "attitudes" and "wine purchases" but also there was a strong positive relationship (correlation r = .50) between these two attributes (see Table 6.4). There was no relationship with "accessory purchases". Thus those visitors who decide to purchase wine at the winery may or may not purchase other accessory items at the winery shop. It was considered by the researchers that visitors may perhaps purchase an accessory item (Example: a tee shirt) out of politeness even if they did not particularly like the wine on offer.

Table 6.4 Wine attributes -Correlation with attitudes, wine purchases and accessory purchases

Wine Attributes	Attitudes	Wine purchases	Accessory purchases
Wine aroma	0	0	0
Wine taste	+	+	0
Wine quality	+	+	0

r = + positive relationship
r = - negative relationship
r = 0 no relationship
(Source: Dodd, 2000)

6.4.2 Service Quality Attributes

Service quality at the cellar door has long been recognised as crucial to wine tourism success (O'Neill *et al.*, 2002; O'Neill and Charters, 2000) with some

Table 6.5 Service Attributes - Correlation with attitudes, wine purchases and accessory purchases

Service Attributes	Attitudes	Wine purchases	Accessory purchases
Overall service	0	+	0
Friendliness	0	0	0
Courteousness	+	0	0
Knowledge	+	0	0
Entertainment	0	-	0
Believable	+	0	0
Professionalism	0	0	0

r = + positive relationship
r = - negative relationship
r = 0 no relationship
(Source: Dodd, 2000)

researchers urging the adoption of accreditation as a way of ensuring the maintenance of quality standards (Jago and Issaverdis, 2001).

Although Dodd (1994) and Dodd and Gustafson (1997) found that a perception of overall service resulted in an increase in "wine purchases", the attributes of "courteousness", "knowledge" and the "believable" aspects of service quality had a positive influence on "attitudes" only (see Table 6.5). These attributes are really only part of the perception of "overall service" quality. The researchers considered that the negative relationship between "entertainment" and "wine purchases" could be a result of the visitor perception that the provision of entertainment facilities are designed to compensate for the poor wine quality or that the winery by stressing its entertainment capabilities is ignoring other service quality attributes.

6.4.3 Price

As could be anticipated from studies of most goods and services there was a negative relationship between "price" and the propensity to purchase wine (see Table 6.6). Thus the higher the price the less wine purchased (and vice-versa). Possibly with wine perceived to be of extremely high quality, a positive relationship (reflecting a "snob" value could exist) (Moulton and Lapsley, 2001; Fattorini, 1997), but this was not apparent in the research of Dodd (1994) and Dodd and Gustafson (1997). There was no relationship between "price" and "attitudes" or to "accessory purchases".

Table 6.6 Price (wine) - Correlation with attitudes, wine purchases and accessory purchases

Wine Attributes	Attitudes	Wine purchases	Accessory purchases
Price	0	-	0

r = + positive relationship
r = - negative relationship
r = 0 no relationship
(Source: derived Dodd, 2000)

6.4.4 Perceptual Differences of Visitors to Winery Attributes

Dodd and Biggotte (1997) researched the differing perceptions of winery attributes held by two distinct demographic groupings of visitors. A number of perceptual differences were found between a younger age group (mean age = 31) and an older age group (mean age = 52). The most notable of their findings were that:

- Younger visitors placed more importance on the price of wine than older age groups when making purchase decisions. Although they appeared to perceive prices to be at lower levels than the older age group who, because of greater wine purchasing experience were more aware of winery price levels generally. The older age grouping considered that wine quality attributes (Example: taste) to be more important than price (when making purchase decisions) than did the younger age grouping.

- The overall service levels of winery staff was considered by younger people to be more important than with the older age group. The attributes of "friendliness", "courteousness", and staff "knowledge" were not considered to be as important by the older grouping than with the younger grouping.
- Both age groupings spent approximately the same on "accessory purchases" but the older age group spent on average US$11 more on wine purchases at the winery than the younger age group. In their normal monthly purchases of wine the older-age grouping spent US$ 37 compared to US$ 29 by the younger-age grouping.
- The attribute of "cleanliness" was perceived to be of greater importance by the older age group than the younger grouping. The attributes of "displays" and "smells" within the winery were rated more highly in importance by the older-age grouping than by the younger-age grouping.

6.5 Marketing and Promotional Activities

Care must be taken in clearly distinguishing between marketing and promotional activities of individual wineries as opposed to the marketing and promotion of wine region destinational areas (see Chapter 7). From the point of view of individual wineries differing measures of marketing and promotional success are:

- To maximise sales revenue from all sources. All winery attractions are designed to increase sales revenue.
- To attract the greatest possible number of wine tourism visitors. This presumes that a proportion of these will always generate on-site sales revenue.
- To utilise relationship marketing techniques. This is achieved by a database which is used to generate newsletters and catalogues thereby maintaining a close relationship with customers who have visited the winery in the past. The aim is to encourage repeat visitation, mail order sales and constant brand

awareness (Example: when wine is purchased at other stockists).
(Getz, 2000; Dodd, 2000; Dodd, 1999; Getz, 1999).

6.5.0 Insufficiency of Wine Industry Marketing Awareness

A number of researchers have commented upon the lack of awareness of marketing techniques by wine producers. Spawton (1991, p.12) noted that even with successful boutique wineries that:

> .. marketing is perceived as something not for them.

According to Macionis (1996), Edwards (1989) and Spawton (1986) strategic marketing concepts are little understood within the wine industry. Welsh (1994) in his master's thesis reviewed peer evaluation of success amongst small wineries in Barossa Valley and McLaren Vale (South Australia), Rutherglen (Victoria), Milawa (Victoria) and Margaret River (Western Australia). Welsh (1994) reported that:

- less than 10% of the subject wineries engaged in any form of market or consumer research;
- less than 50% of the group of wineries studied were able to provide an acceptable definition of the marketing concept;
- practically all winery subjects described marketing in production terminology only;
- unique characteristics possessed by individual wineries could not be identified by their owners who generally did not understand their significance as marketing positions and
- only a small number could determine their basic market segments.

Similarly Macionis (1997) in her study of Canberra wineries also reported an overwhelming concentration on production issues with a consequent lack of understanding of tourism marketing and the tourism sector generally. Marketing considerations should be of fundamental importance to wineries and wine tourism businesses at the local level and to those concerned with destinational development at the macro level (see Chapter 7). Additionally, of concern to wine tourism development, is the dearth of understanding, cohesion and integration between the wine and tourism sectors (Getz, 2000; Getz, 1999).

These issues are exemplified by the Augusta-Margaret River Tourism Association (1994) which as an explanation of the lack of cooperation of the two sectors noted (p. 2) that this existed:

> ..because of the wineries primary focus on producing premium wines rather than facilities and secondly because of the poor understanding of tourism operators about boutique wineries.

6.5.1 Winery Marketing and Promotion

From the wine tourism market model (see Figure 4.0 of Chapter 4), individual wineries present an image to the market-place by which they are "judged" by visitors (or potential visitors) seeking a wine tourism experience. To achieve a favourable image, various marketing strategies must be employed. As with all products and services the strategies that can be successfully employed by a winery are market penetration (Example: increasing sales to existing customers), market development (Example: obtaining sales from new customers), product development (Example: acquire/develop new products to meet consumer demand) and differentiation (Example: create a unique image, distinct from competitors) (Moulton and Lapsley, 2001; Hashimoto and Telfer, 1999).

Fattorini (1997, p. 30) noted the important factors that go towards satisfying the modern wine consumer as:

- brand;
- brand loyalty;
- brand identity and
- consistency (of quality and taste).

The overriding importance of branding in image creation and as a mode of marketing and promotion cannot be over-stressed. Lockshin (1997, p.386), writing in the *Wine Industry Journal*, provided the definition that:

> A brand is really a shorthand description of the various attributes that a specific product provides to the buyer. These attributes are perceived by the buyer and may not be objectively measured.

Lockshin and Spawton (2001) argues that for both wine, winery and wine region, branding although expensive, is extremely important as all are substitutable (Examples: Coonawarra for Bordeaux, Kumeu River Chardonnay for Bourgogne Chardonnay and even a red for a white!). When branding a winery engaging in wine tourism Getz (2000) asserts that:

- the winery should convey the image of quality wines (not necessarily expensive wines);
- it should reflect the positioning strategy decided upon (Example: "trendy" young professionals);
- it should reflect the positioning strategy of the wine region destination (Example: a region for art lovers);
- all theming, names, labels and symbols should reflect these points (Examples: themes of sophistication, historic, ethnic);
- visitors should be educated about the wine styles produced (Example: by knowledgeable winery staff) and
- all imagery must be constantly communicated (Example: heritage winery) in signage, printed material, by staff to visitors and in all forms of advertising.

Informational sources available for consumers were outlined in Chapter 5 and relationship marketing techniques outlined above but wineries can also use event marketing (Examples: Leeuwin Concerts of Margaret River; Mission Concerts at Greenmeadows, Taradale), familiarisation tours (Example: for travel agents, wine writers) and partnering wine with food (Example: regional food using local restaurants) as components of their marketing mix. Although the marketing and promotion of wine-tourism destinational regions is fully discussed in Chapter 7 it is suffice to say that all advertising and promotional material of individual wineries should be complementary to macro promotional efforts (Getz, 2000; Cambourne and Macionis, 2000; Getz, 1999).

6.5.2 Using the Internet as a Marketing and Promotional Tool for Wineries

The use of web sites by wineries has increased substantially in recent years with wineries increasingly developing business to consumer (B2C) e-business strategies (Louvieris *et al.*, 2003). New Zealand Wines Online (2003) and Australian Wine Online (2003) are good examples of these. Each has links to numerous winery sites New Zealand (2003, >140 sites; 1999, >60 sites) Australia (2003, >350 sites; 1999, >120 sites); each are widely used (Australia,

>900,000 hits per month in 2003; New Zealand, >550,000 hits per month in 2003).

A survey of 176 California wineries by Anderson (1999) estimated that over half of the respondents used the Internet for wine sales. Many wineries may not have yet developed their own web sites, but there are often references on regional wine tourism organisation sites to individual wineries (Examples: Victorian Wineries Tourism Council (2003), British Columbia Wine Cellar (2003), Barossa Wine and Tourism Association (2003). Winery sites as well as providing basic facility information concerning the winery (Example: location maps) often have winemaker profiles, winery history, virtual vineyard/winery tours, listings of accommodation available, special wine offerings, events, wine education information and food/wine matching. Using web sites for sales of wine have raised confidentiality issues in many countries and legal issues concerning liquor licensing regulations (which may differ by state) in Australia, Canada and particularly the United States (Richardson, 2002; Anderson, 1999). In his world-wide survey of 500 odd wineries (response rate 20%) Richardson (2002) found that winery web sites could be classified as:

- purely informational sites;
- information sites with a manual sales form and
- e-commerce sites with full shopping baskets or similar systems actively involved in selling wine.

Richardson (2002) also found that on average web sites generated directly only an average 3% of sales revenues with many winery owners stating that their site was particularly useful as an introduction to the winery and for encouraging wine tourists to physically visit the winery.

According to (Getz, 2000) winery web sites as well as providing essential information need to be well designed so that they are easily searched for information desired by the user (Example: opening hours), hyperlinks with wine organisations and other wine tourism businesses in the wine region are also helpful (see Section 7.3.6 of Chapter 7), and if possible they should be capable of processing wine purchases by users.

6.5.3 Enhancement of Winery Facilities and the Development of Regional Infrastructure

The Victorian Parliament Economic Budget Review Committee (1985, p. 186) in its inquiry into the wine industry noted that:

> .. many small and intermediate wineries had not realised the potential of winery based tourist facilities .. [and that] .. if wineries are to attract visitors, one way is to increase the range of facilities available - both sales and special features. This would encourage not only increased private and family patronage, but also coach tours to those wineries with suitable facilities. Such developments would benefit the winery directly, and contribute to the growth of tourist related services in the region itself.

The development of additional winery facilities can also be utilised to increase the size of the target market. Accommodation, food outlets, wine museums, conference centres, sporting facilities, picnic/barbecue areas, novelty rides (Examples: camel, hot-air balloon) and interpretative/educative visitor centres can all enhance the appeal of the winery for visitors (Getz, 2000, Cambourne and Macionis, 2000; Getz, 1999). However individual winery developments are complementary only to the macro region (see Chapter 7).

6.6 Critical Success Factors for Wineries Participating in Wine Tourism

The critical success factors for the development of wine tourism by individual wineries as identified by participants at the first Australian Wine Tourism Conference (Carlsen *et al.*,1999) and participants of the Tri-Cities of Washington State's Appellation (cited in Getz, 2000) are:

- the quality of the wine on offer;
- the winery's reputation;
- being able to taste before purchasing wine;
- the friendliness and wine knowledge of staff leading to an excellent customer service with an overriding satisfying visitor experience;
- special offers of wine;
- the availability of wine educational opportunities (Examples: talking with and meeting owners or winemakers, winery tours, vineyard tours, and other interpretive opportunities);
- ambience/mystique;
- setting and signposting and

- attractive visitor oriented design.

At the US conference more emphasis was placed upon educational opportunities and capable staff whereas participants at the Australian conference stressed winery design, setting and ambience.

6.7 Summary

This chapter detailed the components of the supply side of the wine tourism market model (see Figure 4.0 of Chapter 4), eventually leading to the critical success factors required for a winery to develop a successful wine tourism business. Available research on the supply perspective of wine tourism is largely derived from studies in Australasia although papers from researchers in France, Canada and the United States have also been published. The principal topics researched were the advantages and disadvantages of wine tourism from the perspective of individual wineries, the extent of visitor facilities at wineries, the quality of winery attributes, the differing perceptions of these by demographic groupings and winery marketing (including promotion, branding and image).

Negative attitudes of winery owners and managers towards wine tourism, their focus on production and the consequences of the restrictiveness of interrelationships between the two industries were considered. The advantages and disadvantages of wine tourism was discussed in terms of revenue, profitability, additional costs, customer and market intelligence, sales constraints, educational opportunities and customer relationship building. Wine tourism opportunities were also considered in terms of location, size, reputation and the availability of alternative sales and distribution channels.

The suitability of visitor facilities, either service or physical were compared between regions and countries as well as their perceived importance as rated in various surveys. The enhancement of facilities, by improvement or new development was recognised as a means of increasing visitation, especially repeat visitation. Winery attributes (classified as winery aesthetics, wine attributes, service attributes and price) were considered in terms of quality.

Their correlation with other attributes, consumer attitudes, wine purchases and accessory purchases, were studied in detail. Also noted were the differing perceptions of winery attributes and their importance as held by alternative demographic groupings.

The importance of image, shown on the supply side of the wine tourism market model (see Figure 4.0 of Chapter 4), together with its reliance upon the availability of suitable wine tourism facilities and quality winery attributes was discussed in terms of branding. Successful marketing and promotion campaigns can be measured in terms of market penetration, market development, product development and differentiation. Although the paucity of marketing expertise, by wineries, is acknowledged by many researchers it is critical that a marketing mix of varying techniques be implemented if the development of a successful wine tourism business is a primary objective.

In spite of reported difficulties the Internet provides an opportunity for both wine sales and as a way of introducing a particular winery to wine tourists (or potential wine tourists) but the use of the more traditional ingredients of advertising, brochures, familiarisation tours, events, concerts and cuisine pairing should not be overlooked in the marketing mix. The clustering concept and networking with other interdependent wine tourism businesses is discussed (see Section 7.1 of Chapter 7) when the destinational wine region as a whole is considered.

Chapter seven: The Wine Tourism Destinational Market-Place

7.0 Introduction

The term "destination" lies at the heart of wine tourism as it embodies the concept of place which is common to both the wine and tourism industries. Normally rural, a wine tourism destination contains a cluster of both wine-related and general-purpose attractions. This "winescape" defines the wine tourism destination, its components and their evolving interrelationships. A wine tourism destination is located at the pinnacle of a value added chain, underpinned by a resource base but with each succeeding layer beyond the resource base adding value, although dependent upon the previous layers.

All tourism destinations, including wine tourism regions, exhibit life-cycles which relate to their success (or otherwise) in continuing to attract an increasing (or reducing) number of visitors. Wine tourism, as with other forms of tourism, has economic, socio-cultural, political and environmental impacts which may be either positive or negative as far as the local community within the destination is concerned.

There are a number of additional attractions and activities which exhibit a considerable synergy with wine tourism. These synergies are largely related to the interests and lifestyles of visitors who tend to visit wine regions. The inclusion of such attractions and activities within a wine tourism destination adds considerably to its attractiveness for those planning to visit it. In some wine tourism destinations strategic planning techniques have been used to determine objectives and formulate action plans especially with regard to marketing and promotion.

Marketing and promotion are key considerations for a wine tourism destination and the traditional marketing mix of product, price, promotion and place should be supplemented with the additional factors of packaging, programming, partnership and people. Wine routes, packaged wine tours, wine (and food) festivals, promotional materials, niche products and the Internet are all commonly used to promote a wine tourism destination. However, a coordinating organisation is considered desirable to overcome the traditional paucity of interrelationships between the two industries.

Because any wine tourism destination is underpinned by its resource base, it is imperative that this be preserved and that a sustainable tourism approach be adopted with regard to the environment, the visitors and the local community. A number of critical success factors for a wine tourism destination have been identified by researchers.

7.1 Wine Tourism Regional Destinational Concepts

According to Laws (1995), in the context of theoretical tourism, destinations can be classified as major cities, resort communities, purpose-built resorts or touring areas with one or more service centres. Predominantly, wine tourism destinations are touring areas with small villages and townships that provide essential infrastructure to visitors (Examples: accommodation, information centres, dining facilities). Notwithstanding that most wine tourism destinations are rural, nearby urban centres act as gateways by providing a source of visitors, both domestic and international (Getz, 2000; Hall *et al.*, 2000d).

The term "destination" connotes different meanings, dependent upon the nature of the trip and the place or origin of the visitors (Medlick, 1995). In varying circumstances of wine tourism, alternative concepts of "destination" might be:

- a home or holiday home area where attractions/activities are continuously available;
- an area one is passing through, but with the ability to stop whenever desired;
- a place one is holidaying in, that offers both suitable and interesting

attractions or activities and

- a place of business or meeting/conference/exhibition venue but with participants having available leisure time for the attractions and activities available in the area.

(Getz, 2000)

As noted by Porter (1990), although wineries are the main destinational foci for visitors, a range of wine-related and general-purpose attractions cluster around them eventually developing formal or informal interrelationships of networks and alliances which are then able to promote the destination with or without governmental involvement. Likewise Blandy (2000, p. 80) referring to the example of the South Australian wine industry as:

> ..the classic example of a successful cluster development in South Australia... ..a group of competing. complementary and interdependent firms that have given strong economic drive to the State through the cluster's success in exporting its products and know how nationally and internationally ...

A numerical sufficiency of attractions is also a requirement of successful wine tourism destinational clustering. A number of theorists have noted the need for a "critical mass" of wineries to exist at the core of the cluster (Getz, 2000; Victorian Wineries Tourism Council, 1997).

The destinational notion of place plays an important part in both wine and tourism. According to Relph (1996), the concept of tourism is essentially related to a difference in place, while Dickenson and Salt (1982, p. 149) noted that:

> .. the geography of wine is an experience of place... Its production is intensely geographical, with wine being identified more by location than anything else.

Accordingly both the wine and tourism industries rely on destinational regional branding for both marketing and promotional activities (Fuller, 1997; Hall and Macionis, 1998; Hall *et al.*, 1998), and Hall (1996, p. 114) while referring to the significance of wine appellations as part of regional branding, commented that:

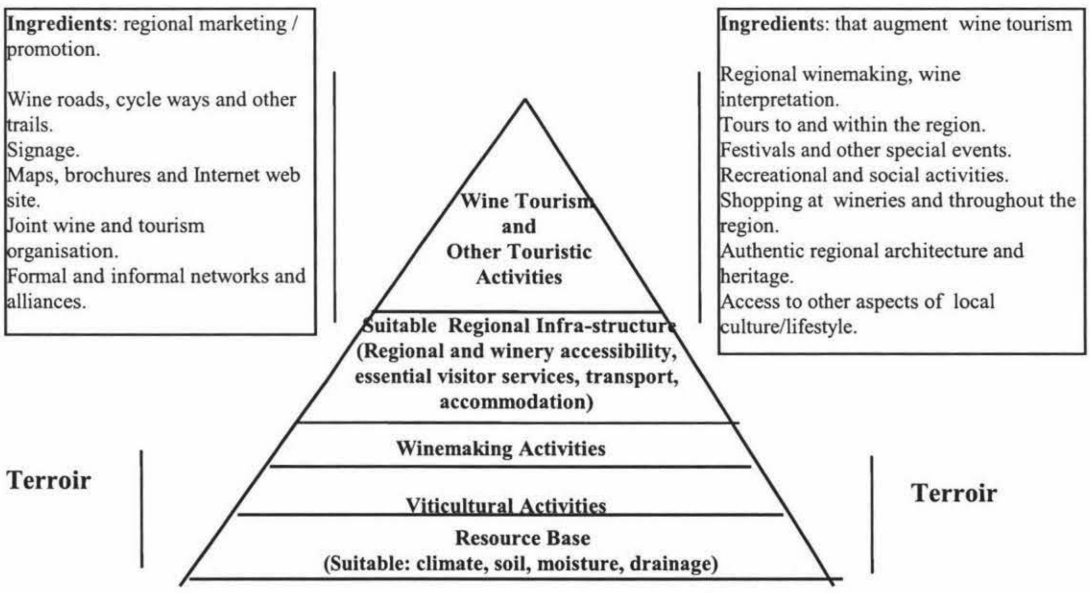
> .. there is a direct impact on tourism in the identification of wine regions because of the inter-relationships that may exist in the overlap of wine and destination region promotion and the accompanying set of economic and social linkages.

Because of the importance of place and its landscape, Peters (1997) introduced the notion of a "winescape", being a unique agricultural landscape (see Section 4.2 of Chapter 4). He suggested that the advent of successful viticultural activities transforms the landscape into an amalgam of agriculture, industry and tourism. This concept links to the definition of wine tourism of Hall (1996) and Macionis (1996) (see Section 4.2 of Chapter 4). The Peters (1997) notion of a "winescape", consists of an assemblage of interrelationships between economic, social and environmental factors that inevitably alter over time in response to changing circumstances. Ultimately a successful wine tourism destination is entirely dependent upon these interrelationships and their constituent components.

7.1.0 Components of a Wine Tourism Destination

From the wine tourism market model (see Figure 4.0 of Chapter 4), both marketing strategies and the marketing mix of the factors involved determine the success or otherwise of wine tourism in a particular region. Important also is the dependency of regional wine tourism upon its underlying components (see Figure 7.0), with each added level adding further value to those preceding.

Figure 7.0 Components of a Wine Tourism Destination



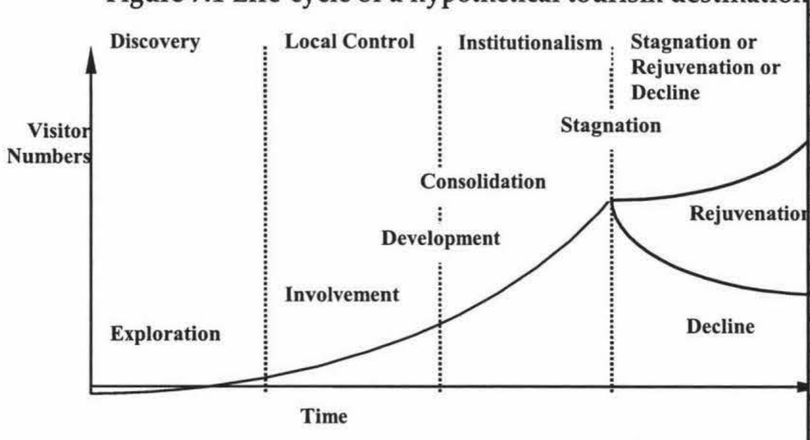
(Source: derived from Getz, 2000)

From Figure 7.0 each successive layer creates additional value to previous layers. However the resource base underpins all layers including the wine destinational region as a whole. Thus the protection of the resource base from degradation is paramount if wine tourism is to remain sustainable over the longer term (see Section 7.4). Depending upon the abilities of the viticulturist, the production of quality grapes relies on the existence of appropriate climate, soil, availability of water and adequate drainage. Given the skill of the wine-maker involved, fine wine production adds value to the grape harvest while the development of a successful wine tourism destination depends upon suitable infrastructure together with marketing/promotion and the clustering of activity-related, independent businesses who form networks/alliances (Getz, 2000, 1999). For a number of reasons, both internal and external, the popularity of destinations are by nature cyclical - they exhibit life-cycles.

7.1.1 Life-Cycles of Wine Tourism Destinations

Butler (1980) introduced the notion of life-cycles as applied to tourism destinations. Butler's (1980) model is illustrated in Figure 7.1 and shows the evolution of a hypothetical tourism destination initially involving exploration by a small number of visitors and as visitor numbers increase it passes through the stages of involvement (with local control), development and consolidation (with control becoming institutionalised) and then a period of stagnation leading to either rejuvenation of the destination or to a period of decline depending upon the decision alternatives taken by stakeholders. Butler (1980) acknowledged that the stages, although normally sequential, may vary enormously as between destinations with regard to elapsed time.

Figure 7.1 Life-cycle of a hypothetical tourism destination



(Source: from Butler, 1980)

Model as Applied to Wine Tourism Destinations
Exploration: Few visitors, lack of facilities, little affects on local community.
Involvement: Visitor numbers increase; facilities built especially to cater for visitors. Community social changes commence as visitor numbers rise.
Development: Noticeable changes to physical landscape and its infrastructure. Marketing to attract even more visitors and governmental involvement at local /national level increases. Some of the earlier visitors now avoid the region.
Consolidation: Continual change leads to opposition from the local community. Region caters exclusively to tourists. Infrastructure is fully developed and older facilities lose popularity.
Stagnation: Carrying capacity is reached and natural attractions replaced by artificial ones. Organised mass tourism is present now but overall visitation begins to fall. Businesses feel the effects of the falling custom. (Source: derived Skinner, 2000).

Although hypothetical, the model provides a rudimentary basis for a life-cycle analysis of wine tourism destinational regions. Skinner (2000), when considering the Napa Valley wine region of California (thought to be in the consolidation stage), applied this model to a wine tourism region through its development stages (see the above summary). According to Skinner (2000) after the "stagnation" stage is reached the wine tourism region may either become rejuvenated, with extreme changes being made to attractions (repositioning), or the region may permanently decline, eventually moving away from wine tourism altogether. Hoffman *et al.*, (2001) also used a life-cycle approach, based upon Butler's (1980) model, but applying it specifically to wine (and food) festivals. Economic, environmental and socio-cultural impacts inevitably affect the region and its community throughout the destinational life-cycle (Getz, 2000, 1999; Macionis and Cambourne, 1998a).

7.1.2 Impacts of Wine Tourism on a Destinational Wine Region

Impacts at a regional or destinational level may be either positive or negative. Macionis and Cambourne (1998a) identified the various benefits to a wine tourism destination as:

- additional employment opportunities for the local community; higher wage and salary levels with better working conditions for the employees involved;
- the direct economic benefit of tourism expenditure as well as indirect benefits as additional funds percolate throughout the community;
- greater educational opportunities for resident wine enthusiasts;
- the establishment and development, of additional local entrepreneurial businesses;
- the increase in social status of residents of the local community because of its transformation from an agricultural economy to a service one and
- an increase in the value and esteem of local culture because of enhanced visitor interest in the region generally.

A number of researchers have identified the negative impacts of wine tourism on a wine tourism regional destination as:

- extreme increases in land values and their effect upon rents and property, with property taxes (rates) likely to force residents from their properties (Hall and Johnson, 1998; Lindberg *et al.*, 1996);

- an influx of workers into the region who consequently overload available services, displacing existing residents from their jobs and eventually leading to lower pay rates for all, because of the increasing labour supply (Hall and Johnson, 1998; Lindberg *et al.*, 1996);
- increasing environmental degradation (Examples: increasing traffic, noise/ air pollution, removal of natural vegetation and annihilation of wild-life (Boxall, 1999; Haight and Ratha, 1995);
- the original residents lose political control over planning and the implementation of new tourism developments (Hall and Johnson, 1998; Lindberg *et al.*, 1996);
- economic leakage as most wine tourism revenues may by-pass the local communities, largely remaining in the hands of non-regional tour operators (Cambourne, 1999, Macionis, 1999; Hussey, 1982) and
- the eventual marginalisation of local communities, who by losing control of access by tourists, now remain in a region which is seen as having entertainment value only (Hall and Johnson, 1998; Lindberg *et al.*, 1996).

Much of the recent revival of the wine industry, particularly in the New World, can be ascribed to the evolution of wine tourism destinations, even if many of the participating wineries have yet to recognise that they are indeed part of the tourism industry (Hall *et al.*, 1998; Macionis and Cambourne, 1998a; Hall and Johnson, 1997; Morris and King, 1997a, b; Hackett, 1997; Macionis, 1996; Dodd, 1995).

7.2 Synergy of Wine Tourism with other Destinational Activities

> [Wine is] the late 20th century lifestyle beverage of moderation. It is more than just a beverage, it has become a lifestyle product with a high degree of complementarity with food, hospitality, entertainment, the arts and tourism.
>
> (Winemakers' Federation of Australia, 1996, p.197)

Wine has always been linked to a certain type of sophisticated lifestyle. This gives it a natural synergy with cuisine, the visual arts, music, culture, history, ethnic customs, antiques and heritage conservation (Getz, 2000). Because of these connections it is common to promote wine tourism destinations by exploiting these natural synergies (Hall *et al.*, 2000d). In many countries, so-called lifestyle publications (Examples: *Cuisine, Gourmet Traveller, Vogue Travel and Entertainment)* together with specialised DVD's, videos, television and radio programs emphasise a lifestyle comprising wine, food, travel and the arts. A review of synergetic interests and activities follows:

- ***History*** - Common within the wine regions of France, the *Maison des Vins* (wine museums), normally attached to visitor centres provide detailed information on a specific wine region, a history of the wines made in the region and the local traditions associated with winemaking. (Frochot, 2000). Similarly throughout most of the other traditional wine regions of Europe, wine museums have also been established. Although not so common in the New World, wine museums do exist especially in older regions and those with a distinct ethnic heritage (Example: Barossa Valley with its German heritage).
- ***Cuisine*** - As with wine, food can also be linked with place identity and destination promotion (Examples: Gruyére, Gorgonzola, Cheddar). Moreover an interest in wine, food and travel is often an integral part of present-day lifestyles. Originally ethnic, many cheeses, oils, fruit and vegetables have now become mainstream food products. By combining both wine and regional food products, destinations can use these linkages for promotional purposes. Cooking classes, recipes, wine and food pairings, fine dining, gourmet and regional gastronomic specialties are all synergetic with wine tourism destinations (Hall and Mitchell, 2001; Hall and Kearsley, 2001). Wine, food and tourism promotions are all directed at consumers with a higher than average discretionary income (Dodd, 1995). A clean, green, healthy, lifestyle image is also created embodying the distinctiveness of particular regions (Australian Wine Foundation, 1996).
- ***Arts and Antiques*** - Both the visual arts, antiques and music are frequently used to promote wine tourism destinations. The demographic characteristics of people interested in the arts and antiques is very similar to those interested in wine (Hall, 2000; Getz, 2000; Getz, 1999). Accordingly art

exhibitions, art auctions, antique auctions and concerts are frequently held within wine regions in order to attract additional visitors. The Leeuwin concert series, held in the Margaret River wine region, Western Australia and the Mission Vineyard concerts, in Hawke's Bay, New Zealand, are good examples of these. These both feature world-class performances (Examples: London Philharmonic Orchestra, Kiri Te Kanawa, Ray Charles, Dianna Ross, George Benson). Jazz concerts held in wine regions are also growing in popularity (Examples: *Waiheke Island Wine and Jazz Festival* in Auckland, *Jazz in the Vines* in the Canberra District) (Cambourne and Macionis, 2000; Getz, 2000; Horgan, 2000). The artistic imagery frequently used on wine labels, reflects the synergy of wine and the arts (Joseph, 1987).

- ***Sports*** - As well as games associated with France, such as pétanque, other sporting activities, favoured by targeted groups are also promoted within wine regions. In Bordeaux there are a number of wineries with golf courses attached (Example: In the Bordeaux Gironde area *Chateau des Vigiers* is a self contained golf resort, attached to a winery and built in 1990).

To exemplify the synergy between wine and other activities *The Wine Spectator* (1997) selected the following wine regions as their favourites:

Burgundy - for its gastronomy and history;

Bordeaux - for its golf courses, name-brand and historic chateaux;

Tuscany - for its art exhibits, superb climate and enchanting countryside;

Napa - for its sporting activities and bold, exciting atmosphere and

Sonoma - for its understated peacefulness.

For all wine tourism destinations two of the key determinants of success are marketing and promotional activities (Cambourne and Macionis, 2000; Getz, 2000; Mitchell, *et al.*, 2000; Dodd, 2000; Getz, 1999).

7.3 Wine Tourism Destination Marketing and Promotional Issues

More frequently in the New World, strategic planning has been used for wine tourism destination planning in a number of wine regions, especially with regard to marketing and promotional issues. Notably in Australia and New Zealand, SWOT analysis has been used in order to recognise and comprehend the key strengths, weaknesses, opportunities and threats of the wine industry in particular regions. By analysing these various factors and their interrelationships, effective policies can then be formulated with regard to the development of both short and long term objectives for wine tourism in the region (Victorian Wineries Tourism Council, 2003; Wilkins and Hall, 2001; South Australian Tourism Commission, 1997). From a marketing perspective, any tourism destination has the four key facets of:

- attractions and activities;
- amenities and facilities;
- accessibility and
- image.

(Swarbrooke and Horner, 1999; Holloway and Robinson, 1995)

From the viewpoint of marketing a number of theorists have developed a range of objectives for the development, marketing and promotion of wine tourism destinational regions (Hall *et al.*, 2000c; Getz, 2000; Macionis and Cambourne, 2000; Getz, 1999, Leiper and Carlsen, 1999). These objectives include the need to:

- attract high yield special interest wine tourists to stay more than one night in the wine region;
- enable wineries to generate both wine and ancillary sales from visitors;
- develop a range of accommodation and food services in the region that best meet the needs of visitors to that region;
- develop a range of recreational attractions and other services available for visitors and themed around wine - the core product;
- create brand name recognition for the wine region destination and a desirable image;
- create a theme for the region, based upon wine and wine-related products and activities;
- provide adequate education and information for visitors to the region and
- establish wine touring routes using themed signage.

The actions required to achieve these objectives have been identified by the same theorists as:

- the establishment of a regional organisation between regional wine industry participants, destination marketing organisations and the suppliers of all essential and augmented visitor services; the involvement of government at any level (national, regional, local) (see Section 7.3.4) is a contentious issue amongst the different writers, with some arguing for and others arguing against;

- conservation of the natural resource base, including its rurality and
- an extensive research programme.

For any wine tourism destination, having determined the marketing objectives and the various actions required to achieve these, a marketing mix of the variables involved must then be concluded.

7.3.0 The Wine Tourism Destinational Marketing Mix

Kotler *et al.* (1994, p. 68) defines the marketing mix as:

> .. the mixture of controllable marketing variables that the firm uses to pursue the sought level of sales in the target market.

Although Kotler *et al.* (1994) preferred to use the four "C's" to better express the role of the consumer (customer value, cost, communication, convenience), traditionally these marketing mix variables have always been known as the four "P's" (product, price, promotion and place) (Middleton and Clarke, 2001; Teare *et al.*, 1994). Referring specifically to the marketing mix of tourism destinations, Morrison (1996) added a further four "P's" (packaging, programming, partnerships, people) to the original four. With reference to the marketing mix of wine tourism destinations, the Wine Tourism Market Model (see Figure 4.0 of Chapter 4) is considered with regard to all of these factors:

- ***Product*** - destination offering viticultural and wine-making experiences with distinct destinational branding (Example: "wine country").
- ***Price*** - reputation and positioning are necessarily price related; need to advise visitors of the cost of all activities, attractions and available packages.
- ***Promotion*** - firstly promote the destination as a whole and then the individual attractions and activities using wine themed visitor centres, signage and the marketing of destinational events.
- ***Place*** - position the destination as a place for day-trippers, or/and short

breaks, or/and holidays, or/and touring, or/and meetings, or/and special events.

- ***Packaging*** - packages (accommodation, transport, attractions, activities) are designed for differing market segments on a seasonal basis.
- ***Programming*** - these are the area-wide wine events involving the local community.
- ***Partnerships*** - joint marketing promotions between related attractions (using wine tourism organisations if they exist in the region).
- ***People*** - As well as gaining the support of local residents, a destination-wide training programme for all staff and owners involved in the destination's wine tourism industry.

(Getz, 2000; Macionis, 1997).

7.3.1 Wine Trails, Roads and Cycle-ways

These are routes which can be used for walking, cycling, riding, driving or any other means of transportation in order to draw on the natural or cultural heritage of a wine region. Additionally, on a scale consisting of the extremes of education and enjoyment, wine routes are each able to provide differing combinations of these two factors for individual visitors travelling along them (Getz, 2000). According to Hall and Macionis (1998), the development of wine routes throughout the traditional wine producing regions of Europe and increasingly within the wine regions of the New World, provide the linkage between wine and tourism. To be effective wine routes must be marked on the ground (signage) as well as on maps, brochures and other literature available to wine tourists (Getz, 2000).

The history and development of wine trails, routes, roads and cycle-ways in different countries and wine regions was discussed earlier (see Sections 4.3, 4.4 and 4.5 of Chapter 4). They can be seen as tourism promotional tools and in some countries (Example: France) are usually associated with other attractions combined with wine (Examples: historic buildings, regional food) (Frochot, 2000; Charvet and Desplats, 1995). Although wine tasting is the *raison d'être* of any wine route, the overall concept is one of a bounded space, as this not only defines the attributes of a particular region's wine style but also it declares the uniqueness of the region's cultural heritage and the winemakers located within (Williams and Kelly, 2001; Getz, 2000).

Silbergh *et al.*, (1994), writing about theme trails generally, identified the costs as signage, maps and organisation collaboration and asserted that they should always embody the characteristics of:

- allowing for continuous traffic flows;
- providing maps;
- including facilities and activities appropriate to the theme;
- facilitating discovery;
- providing linkages between related routes;
- involving both public and private stakeholders;
- integrating attraction planning, while considering route capacity, permanent monitoring and maintenance and
- involve the receipt of feedback from users.

7.3.2 Packaged Wine Tours

The types of packaged wine tours available (Examples: they may include either/or transportation, accommodation, attractions, activities), both internationally and domestically vary from wine region to wine region and from country to country (see Section 4.4 and Section 4.5 of Chapter 4). Although the availability of packaged wine tours is important for the marketing of wine tourism destinations, in many wine regions wineries are concerned about the effect of large numbers of people arriving on packaged tours. Such wine tourists are often seen as "swilling, unsophisticated" visitors spending only small amounts on wine (Getz, 2000, p. 64). Accordingly wineries are often reluctant to handle large tour groups, frequently requiring advance reservations as:

- they are unable to attend to large numbers of people arriving at one time;
- they resent the fact that tour companies are making a profit from the winery tour group and
- they are unable to cater for the special needs of certain visitors.

(Getz, 2000; Hall *et al.*, 2000d)

The question also arises as to why visitors to wineries travel in group tours at all. Getz (2000) argues that visitors to wineries travel on packaged tours because: it is convenient; they lack transportation; it is perceived as less expensive; unusual and rare wines are often made available to large groups; of the benefit of a knowledgeable tour guide; of a fear of drinking and driving; of a desire for pampering and socialising in a group situation with like-minded people.

7.3.3 Wine (and Food) Festivals

Wine (and food) festivals are included in the definition of "wine tourism" of Hall (1996) and Macionis (1996) (see Section 4.2 of Chapter 4). Mostly these are held in wine regions, although increasingly urban centres with high population densities are chosen as venues (Getz, 2000). In Europe wine festivals and feasts are traditions that stretch back into antiquity. In the wine regions of France for example, *fêtes* tend to either commemorate the different stages of wine-making (Example: *vin nouveau* for the release of the new vintage) or they have religious connotations, celebrating the various patron saints of the Catholic Church (Example: St. Vincent, the patron saint of grape growers) (Frochot, 2000). Although most wine (and food) festivals in Europe are regional and patronised by local residents, larger events with a long history do exist. For example in Switzerland the *Fête des Vignerons*, in honour of the local wine workers of Vevey, was last held in 1999 and attracts over 500,000 visitors with 5000 performing actors; it is held only five times per century (Hall *et al.*, 2000d).

Pratt (1994), in his dissertation, argued that promotion rather than sales is the primary motivator for businesses participating in wine events and that wine (and food) festivals offer similar benefits as those provided by visits to wineries. These have been identified by Campbell (2001), Snow (1977) and Pratt (1994) as:

- the establishment of a distinct and more powerful image by wine regions;
- wineries are able to promote their brands to both existing and new

customers and to interact and gain feedback from them;

- wine events give wineries access to "targeted, qualified buyers or customers with an interest in the products displayed and a desire to purchase them" (Snow, 1977, p. 377). Research also indicates a tendency to visit festival participating wineries at a later time as well as purchasing their wine at other outlets (Houghton, 2001) and
- a greater leverage with media is gained as a "critical mass of winemakers is assembled in the one place with a theme that creates journalistic interest" (wine show organiser Roy Moorfield, cited in Snow, 1997, p. 377).

Festival attendees tend to be either motivated by the theme of the festival or alternatively they are looking for an enjoyable social outing with friends and family (Getz, 1997). In common with most festivals and special events, the bulk of attendees at wine events will be day visitors living within close range of the venue. Accordingly, festivals located in or near large cities will generally prove to be the most popular (Getz, 2000; Hall, 1992).

Attendees at wine (and food) events tend to have different characteristics than those who visit wineries (see Sections 5.3, 5,4 and 5.5 of Chapter 5), although the market segments attracted will depend largely upon the key variables of price, location, entertainment offered and promotion (Getz, 2000). Attendees at the New Zealand Wine and Food Festival, in Auckland, were found by Getz (1997) to be young, upwardly mobile professionals, looking for contemporary food, music and wine in a party setting. In Victoria, Golledge and Maddern (1994) found that blue collar workers aged between 18 and 24 showed the highest interest in attending wine (and food) festivals. Tourism South Australia (1991) in a survey of 750 attendees (of 24,000 in total) at the Barossa Vintage Festival discovered that:

- 7% were international, 15% out of state, 42% from Adelaide (with 84% not from Barossa);
- 26% stayed one night or more in the Barossa Wine Region;
- 28% were family groups, 6% were alone, 35% were couples and 10% were friends;

- 4% of attendees were visiting on packaged tours and 16% were staying with family and friends;
- of interstate and international visitors, for 22% of these the festival was the main motivator to visit South Australia and
- festival attendees spent AU $1.6 million in total.

Festivals tend to have a charter or primary objective which reflects the positioning or image that the organisers are endeavouring to create in an effort to promote the wine region generally (Williams, 2001). The Marlborough Food and Wine Festival held at Montana's Brancott Estate, is arguably New Zealand's best known wine (and food) festival, its charter includes:

> .. to attract attention to Marlborough and its produce, to assist the district's economy and .. as a consequence (to) provide increased opportunities for tourism, both domestic and international.
>
> (cited in Pratt, 1994, p. 32).

However, although attendees are now limited to a maximum of 12,000, for a period there was no such limitation in place and consequently numbers soared beyond 30,000. During this time objectives were ignored and a "drunken party" atmosphere prevailed which was not only contrary to the charter but more importantly detrimental to the region's image (Hall, 1996).

Wine (and food) festivals/events can be classified as:

- community festivals in wine regions (Example: cultural wine festivals of Europe) - wine from all winery participants is normally sold at one central festival site;
- multiple moveable "grazing" feasts held at a number of sites - food, wine and entertainment are available at the different sites with visitors transported by walking, shuttle bus, cycle or in their own vehicle (Example: Toast Martinborough Festival, Wairarapa, New Zealand);
- city and resort based - often for charitable purposes with space provided for wineries (Example: Devenport Wine and Food Festival of Auckland) and
- special events and functions at wineries - these may be educational (Example: arts and crafts), designed for entertainment (Example: concerts), business related (Example: shareholder meetings), recreational (Example: golfing) and dining/drinking (Example: ethnically themed banquets).

7.3.4 The Marketing and Promotional Roles of National and Regional Organisations

The concept of national, regional and local wine tourism structures was earlier discussed (see Section 4.3 of Chapter 4). Interrelationships between participants in the two industries do not naturally occur and consequently a number of theorists have argued for the formation of regional organisations to fill this void (Hall *et al.*, 2000c; Getz, 2000; Hall *et al.*, 1998; Hall and Johnson, 1997; Macionis, 1997, 1996). Marketing and promotion of the particular wine tourism destination is a key function of such an organisation and Getz (2000, p.6) argues that:

> Wine tourism can exist with little or no coordination or planning but some form of concerted marketing is needed to stimulate growth.

According to Getz (2000), that at the very least, existing tourism organisations based regionally could fill this marketing and coordinating role, provided they understand the wine tourism possibilities within a region and are able to capitalise on these. However, he believes that a more sophisticated organisation could detect trends, direct research and employ targeted marketing. Getz (2000) further considers that the minimal promotional prerequisites are the provision of maps, brochures and signposting.

With regard to the involvement of government (local, regional, state or national), Hall *et al.*, 1998 noted that linkages will not generally evolve between participants unless financial benefits are perceived. Thus for effective relationships to occur governmental involvement either directly or indirectly (by grants) is often needed in order to minimise the costs involved for the private sector participants. Hall *et al.* (1998), while noting the desirability of such regional organisations, particularly from a marketing viewpoint, also observed that eventual success is not always assured.

7.3.5 Destinational Promotional Materials

Route maps, guides (see Section 7.3.1) and lure brochures, available in each wine tourism destination, should provide full particulars concerning the region's attractions and activities. Event calendars, promotional videos and

DVD's, can also be used to promote the whole region and are especially useful for both media and tour companies (Getz, 2000). Tourists are commonly deluged with brochures. Although a large proportion of these are discarded their influence on decisions to undertake an activity or to visit a particular site is most influential (Page *et al.*, 2001; Lawton and Page, 1997).

All educational material should be designed to complement the "wine country" experience. According to Getz (2000), the provision of an annual regional awards ceremony for wineries, winery restaurants, wine festivals, "tourist oriented" wineries, winery functions and wine-themed communication material can be useful to reinforce the service quality standards of the wine tourism destination. As the number of wine regions rivalling each other for wine tourists continues to increase, so to does the need to be clearly and uniquely positioned in the minds of the potential visitor. The expanding usefulness of the World Wide Web to assist in this should not be understated.

7.3.6 The Internet as a Marketing Tool for Wine Tourism Destinational Regions

Increasingly wine destinational regions are using the Internet to promote their own particular wine regions, together with hyperlinks to the wineries and other attractions located within. Calendars of regional events are normally included, with location maps of the region showing its wineries, restaurants, transportation, winery tour operators and accommodation providers (Examples: Barossa Wine and Tourism Association, 2003; Victorian Wineries Tourism Council, 2003). In the absence of specific wine tourism organisations, regional tourism organisations frequently have a large wine tourism component on their web pages (Examples: Destination Marlborough, 2003; Terroirs Bourguignons, 2003), as do regional wine organisations (Examples: Napa Valley Vintners Association, 2003; Wine Council of Ontario, 2003), national wine organisations (Greek Wine, 2003; South African Wine, 2003), national wine tourism organisations (Example: Movimento del Turismo del Vino, 2003) and even national tourism organisations (Example: National Chile Tourist Board, 2003).

7.3.7 Niche Marketing of Wine Tourism Products

As part of their promotional strategy, wine regions often endeavour to develop niche markets for specific wine tourism products. Ice wine is a good example of such niche marketing. Produced in wine regions, which because of their cold climates are only marginal for grape growing, ice wine, made from grapes frozen on the vine, draws a considerable number of Japanese tourists, attracted by the wine's fruity sweetness. The wine regions of Central Otago, New Zealand and Ontario, Canada have both promoted this niche product, mainly to international visitors (Motluk, 2003; Cull, 2001; Hashimoto and Telfer, 1999).

In a number of wine regions organic viticulture and winemaking practices are spreading rapidly. With particular appeal to "baby boomers" organic wine builds on the green, healthy, image often associated with wine. The number of consumers concerned about the use of fertilisers and pesticides utilised in food production is increasing around the world (Kaplan *et al.*, 1996). Accordingly, in some wine tourism destinations, these environmentally friendly practices are used as a marketing tool, to promote both individual wineries and destinations where a significant number of wineries have been awarded organic certification. For example, in California ten percent of wineries are now certified as organic for some or all of their vineyards (Lockspeiser and Gear, 1991).

7.4 Sustainable Tourism and the Protection of Wine Tourism's Regional Resources

Swarbrooke (1999, p. 13) defined sustainable tourism as:

> .. tourism which is economically viable but does not destroy the resources on which the future of tourism will depend, notably the physical environment and the social fabric of the host community...

The core of sustainable tourism is to balance the competing needs of the "host" (community), the "guest" (visitors) and the "environment" (Page *et al.*, 2001). A number of tourism theorists had earlier considered this notion even before the expression "sustainable tourism" became commonly adopted. Urry (1990), MacCannell (1989), Pearce (1989), Krippendorf (1987), Murphy (1985) and Butler (1980) in their seminal publications all drew attention to the problems of excessive visitation by tourists and the "over-development" of natural areas which may occur in order to provide facilities for them. Many concepts on sustainable tourism have been introduced and subsequently developed in the literature and include:

- relationships between hosts and guests;
- destination life-cycles;
- the idea of "carrying capacity";
- the debate on the ethics of tourism - particularly to undeveloped countries;
- "acceptable use" and "limits of acceptable change";
- maintenance of a "sense of place" and
- the arguments for and against "commodification of culture/place" and "authenticity".

A number of these topics are directly related to the components of a wine tourism destination especially to its resource base (see Figure 7.0). For wine tourism to survive and prosper its regional resource base must be protected (Getz, 2000; Skinner, 2000). Within a wine region, the protection of the regional resource base requires a comprehension of the needs of the local community and the perspectives and aspirations of its visitors, tour operators and all levels of government. Butler (1997) argues that adherence to such sustainable tourism guidelines necessarily involves planning, management and commitment, with local residents included in this planning process. Failure to do this will result in developmental, socio-cultural and lifestyle disenfranchisemental problems (see Section 7.1.2) as demonstrated by Napa Valley (Skinner, 2000; Kaltenborn, 1996; Sharp, 1992).

An awareness of the carrying capacity of both the natural and cultural environments is a requirement in the planning and development of a wine tourism destination. This requires a greater level of insight than a knowledge of the maximum number of tourists permissible, as it has socio-cultural, economic, aesthetic as well as environmental dimensions. The degradation of the natural environment, its visual quality and the lifestyle of its residents denotes that the carrying capacity of a tourism site has been breached and that the push for short-term gains has out-weighed long-term objectives (Butler, 1997; Healy, 1994; Butler, 1991; Martin and Uysal, 1990).

Nowhere else in the world has wine tourism become so developed than in Napa Valley, adjacent to San Francisco in California (Skinner, 2000; Getz, 2000; Conway, 1990). Within its 50 km length are constant traffic jams, hooting wine trains, soaring hot-air balloon riders, over 5 million visitors annually, 240 wineries, 17,000 tourism jobs and US$650 million in revenues. Its over-development is best expressed by Sharp (1992):

> Rurality, in Napa County, has essentially been destroyed; there are too many people, houses, cars, stripmalls, motels, beds-and-breakfasts, balloons, shops, stores, cutesy boutiques, and wineries. The whole point of the exercise has been defeated by its own success and excess.

Sharp (1992) warned of the growing resentment of locals and that the negative aspects of wine tourism not only severely limits the capacity of wineries to provide a positive tourism experience for their visitors but also may eventually threaten to destroy the tourism product itself. Not only is the loss of prime vineyard land to urbanisation an obvious threat to the resource base of wine tourism but also the genetic modification of grape vines (Example: as in Niagara, Canada to make vines capable of resisting the cold) can serve to detract from the healthy image of wine generally (Getz, 2000).

7.5 Critical Success Factors for Wine Tourism Destinational Regions

Table 7.0 sets out the results of a study comprising two samples (Getz *et al.*, 1999). The samples consisted of participants at the First Australian Wine Tourism Conference, held in Margaret River in 1998, and participants in a wine tourism seminar (the first of its kind) held in the Tri-Cities of Washington State's Columbia Valley appellation in 1998. The questionnaire was based on a three point Likert scale with responses ranging from 1 (minimum score) to 3 (maximum score). The means were calculated and the results ranked for each sample with an overall ranking being calculated for each factor. The results of each sample were remarkably similar with only factor 10 (related to the preservation of heritage sites) showing a significant difference (independent samples t test) in comparative means.

Table 7.0 Ranking of factors important for developing a successful wine tourism destination

Factor	Overall Mean	Overall Rank	Australia Mean	Australia Rank	Washington State Mean	Washington State Rank
1.Wine routes and trails well sign-posted.	5.75	1	2.82	1	2.93	1
2. A strong tourism marketing organisation.	5.50	2	2.68	4	2.82	2
3. Maintaining a constant wine related image.	5.42	3	2.65	5	2.77	3
4. Wine festivals and related special events.	5.37	4=	2.69	3	2.68	4
5. Fine dining and gourmet restaurants.	5.37	4=	2.71	2	2.66	5
6. A broad range of attractions/activities.	5.14	6	2.60	7	2.54	7=
7. Having large numbers of wineries in the area.	5.08	7	2.54	9	2.54	7=
8. Unique accommodation such as country inns.	4.99	8	2.56	8	2.43	9
9. A strong tour industry.	4.91	9	2.35	10	2.56	8
10. Preservation of local heritage sites.	4.79	10	2.65	6	2.14	10
11. Having a good highway system.	4.77	11	2.41	11	2.36	11=
12. Leadership from one or more wineries.	4.62	12	2.26	12	2.36	11=
13. Being close to large cities.	4.16	13=	2.12	14	2.04	14
14. Selling the region's wine internationally.	4.16	13=	2.16	13	2.00	15
15. A pleasant all-year round climate.	3.94	15	1.87	16	2.07	13
16. Create all-year round resort environment.	3.81	16	1.90	15	1.91	16
17. Having an international airport nearby.	3.54	17	1.65	17	1.89	17

(Source: derived from Getz *et al.*, 1999)

Getz (2000) summarised the critical success factors (unranked) for wine tourism destination regions as:

- a regional reputation for quality wines;
- wineries oriented towards visiting wine tourists;
- attractions and activities providing unique wine country experiences;
- a "critical mass" of wineries in the region;
- protection of the wine region's resource base;
- accessibility to large centres of population;
- a focus on high yield visitors;
- leadership within the region (private or public) and cooperation between regional wine tourism related businesses;
- regional branding to enhance the region's image;
- the use of regional festivals and special events as part of the image building process;

- encouraging tour companies to create and promote regional package holidays and
- creating a synergy of wine and lifestyle for wine tourism visitors.

7.6 Summary

The concept of "destination", commonly used by the tourism industry, centres around the notion of place. Place is also an integral part of the wine industry being related to the various forms of appellation control systems now used in many of the world's wine regions.

Coined as an all encompassing designation that includes the physical aspects of the landscape within a wine region, a "winescape" envelops the evolving interrelationships which exist between the components of a wine tourism destination. Thus a "winescape", normally located in rural areas, consists of a central core of wine-related attractions around which clusters of other tourism attractions and activities have evolved. These separate businesses, owned individually, are both independent and complementary.

The foundation of the wine tourism value added chain is its resource base. Each successive layer of, grape growing, winemaking and regional infrastructure, adds value but depends on previous layers, until eventually the wine tourism destination embodying all of these components is reached.

All tourism destinations are thought to proceed through various stages of a life-cycle. Although defined by the number of visitors attracted, the various life-cycle stages of a destination exhibit certain characteristics with regard to control, community attitudes, financial success as well as the relationship with the resident community. Depending upon the current life-cycle stage of the destination, wine tourism, as with other forms of tourism, exhibits economic, socio-cultural, political and environmental impacts. With regard to the local community, these may be either positive or negative.

Synergies exist between wine tourism and a number of additional attractions and activities. The visual arts, historic structures and artifacts, other cultures, music, antiques, certain sports and cuisine, are good examples of these affinities. Such associations between wine tourism and other products or services mainly reflect the interests and lifestyles of visitors to wine regions. The inclusion of these additional attractions and activities within a wine tourism destination adds considerably to its attractiveness for those planning to visit.

In a number of wine regions, particularly New World destinations, the development of wine tourism frequently involves the use of strategic planning methodologies in order to determine the strengths, weaknesses, opportunities and threats of a particular region. Goals and objectives are set and an action plan agreed upon for their implementation.

For wine tourism destinations, marketing issues are important considerations. The "four P's" of product, price, promotion and place are the key factors included in a traditional marketing mix but for wine tourism destinations the additional factors of packaging, programming, partnership and people should also be included. The common promotional tools used for wine tourism destinations are wine (and food) festivals, wine routes, packaged wine tours, niche product development, promotional materials and the Internet. Theorists suggest that a coordinating organisation (with or without governmental involvement) especially for marketing and promotion, is needed to represent the disparate interests of both industries. Around the world there are many regional examples of these, although only in Australia does an overall coordinating organisation exist to implement a national wine tourism strategy.

Because any wine tourism destination is supported by its resource base, it is vital that this be secured and that a sustainable tourism approach be embraced with reference to the environment, the visitors and the local community. Researchers have also identified a number of critical success factors for a wine tourism destination.

Chapter eight: Laws and Industry Organisation

8.0 Introduction

> ...the environment in which a marketing system operates influences its eventual structural development. (Serrallach, 1984, p.15).

In New Zealand, governmental wine laws and regulations exist with regard to the four broad areas of production, labelling, cellar-door sales and exports. With the exception of cellar-door sales, in comparison with other wine-producing countries, New Zealand adopts a far less rigorous regime than most. New Zealand's fledging wine industry was initially fostered within a protectionist environment. Not only did this reflect successive governments' policies of domestic industrial development but also it illustrated the lingering anti-alcohol attitudes of a conservative New Zealand society.

The question of governmental alcohol policy and the perceived public good should also be considered as well as the need to balance this aspect of social policy against fiscal prudence. Taxation, tariffs, import licensing, geographic certification and other associated laws together with their related regulations have impacted considerably upon the wine industry, its structure and organisation. This trend continues up to the present time.

8.1 Historical Perspective of Existing Governmental Regulations

A time-line of the historical perspectives of existing governmental laws, regulations and related commissions of enquiry related to liquor licensing are contained in Section F.0 of Appendix F. Section F.4 of Appendix F schedules all governmental legislation, regulations made and commissions of enquiry, mentioned throughout the text and elsewhere in the appendices. Table A.31 of Appendix A schedules the law and regulation changes that have occurred over the last fifty years, matching these with changes in wine consumption during this period. An overall representation of the current organisation of the wine industry and its governmental relationships are shown in Figure 8.0.

8.2 Current Governmental Laws and Regulations for Wine-making

A time-line of both government legislation or regulations as well as various submissions and reports of commissions related to wine-making are contained in Section F.1 of Appendix F.

In 2003 the Australia New Zealand Joint Food Standards Code (2001) became effective. These standards, common to both Australia and New Zealand, are designed to eventually replace all of the provisions of New Zealand's earlier Food and Drug Regulations. As they presently stand, these new regulations will not provide for matters covered by Food Regulation 225, (Food Regulations, 1984) specifically "variety of grape" and "country of origin labelling". Examples still exist of differences in acceptable practices as between Australia/New Zealand and the wine producers of the European Union. In a recent article in the New Zealand Herald it was pointed out by the journalist that although the addition of "oak chips" was perfectly acceptable during barrel fermentation in the two antipodean countries this was definitely regarded as contrary to the wine-making traditions of Western Europe (New Zealand Herald, 2003b).

8.3 Taxation

Traditionally all liquor sold in New Zealand has been viewed by successive governments as a ready source of additional revenue. Originally justified as being a tax levied on "luxury goods", currently it is deemed necessary as a mechanism to recover "future public health costs" (Halliday, 1998; Cooper, 1997). Section F.2 of Appendix F sets out a time-line of governmental taxation policy over the years and up to the present time.

8.4 Tariff Protection and Import Controls

Section F.3 of Appendix F provides a time-line of the earlier implementation and the eventual removal of import controls and tariff protection regimes up to the present time.

8.5 Geographic Certification and Appellation

Although the Portuguese delimitation of the Upper Douro Valley was the first modern example of vineyard demarcation (Financial Times, 1997), it is the French who have developed the most comprehensive system of demarcation for wines based on their places of origin (de Blij, 1983). Commencing in 1855 and following a thousand years of viticulture in Bordeaux, a system of classification originated based on classifying sixty vineyards ("domaines") of the Gironde region into "Growths" ranging from "First Growths" to "Fifth Growths". At the top were four acclaimed "crus". This classification, with the exception of one re-classification from "Second Growth" to "First Growth" remains intact today. This 1855 Classification was a precursor to a far more important system designed to maintain the quality achieved, prevent dilution and fraud (de Blij, 1983). The second level of wine quality in France is known as *délimité de qualité supérieure* (VDQS). These wines are of an extremely high quality from a specific place or region.

More recently (1973) the geographic "place" notion has been extended by the French *vin de pays* system this is the third level of wine quality. Meaning country wine, this system covering one hundred and forty geographic designations, relates to an intermediate category of wines, superior to basic *vin de table* or *vins ordinaires.* Restricted grape varieties, non-blended, made only in limited quantities, submission to a grape tasting panel and minimum alcohol content, are the requirements for a wine to qualify as *vin de pays* (Robinson, 1999). Although Italy has the *Indicazione Geografica Tipica* (IGT) classification system based on the French *vin de pays* system the system has become so complex, with so many sub-classifications, that unlike the French system it has largely lost credibility amongst consumers (Belfrage, 2003).

The concept of "terroir" lies at the heart of the French appellation system (Appellation d'Origine Controlee Laws (ADCL or more commonly AOC)). "Terroir" encapsulates soil, climate, viticultural practices, landscape and even humans at a particular location where vines are grown (Cooper, 2003; Cooper, 2002; Moran, 2001; Yoxall, 1978).

Originally an observed convention, ADCL became law during the early part of the twentieth century applying to all of the vineyard areas of France with the partial exception of Alsace. In each particular region planted grape varieties, pruning methods, permissible maximum yields, alcoholic strengths, vintages and crushed grape origins are rigidly controlled (Lichine, 1961). Adaptations of these stringent regulations also govern wine production in Germany, Spain, Portugal and Italy. Thus wines are named according to their geographical locations (Examples: Chablis, Burgundy, Sauternes, Mosel) with the location thereby dictating many characteristics of the wine (Paul, 1996). In both the United States and Australia specific wine producing regions/sub-regions are gradually becoming recognised in law (Approved Viticulture Areas, AVA) while the Canadian Province of British Columbia is now using the VQA symbol (Vintner's Quality Alliance) as a forerunner to an appellation system.

Such local regulations with regard to labelling of vintage, grape variety and blends generally conform to those of continental Europe. However flexibility in the viticultural regimes of varieties planted, yields permitted and pruning methods adopted are still permissible (Halliday, 1998; Rankine, 1996; Jamieson, 1981a; Jamieson, 1981b; Thompson, 1973).

Amongst countries producing quality wines, New Zealand's paucity of labelling regulations guaranteeing the integrity of its wine regions, is notorious. Provisions contained in both the 1986 Fair Trading Act and the 1946 Food and Drug Regulations (together with subsequent amendments) are neither specific to wine nor do they guarantee the integrity of geographic claims made on wine labels. Thus a bottle of Sauvignon Blanc claimed to be of Marlborough origin may contain only a small percentage of grapes originating from that region.

Additionally there are no provisions whatsoever related to vintage dating. Although the Geographical Indications Act of 1994 recognises the existence of legal geographic locations within New Zealand these have yet to be included in any specific rules related to wine production. More recently the concept of specific regional and sub-regional labelling has begun to appear on New Zealand wines. The Gimblett Gravels Winegrowing District of Hawkes Bay is an example of this and even more specifically Mate's Vineyard, a particular vineyard area belonging to Kumeu River Wines, honours its now deceased founder who originally planted it (Brajkovich, personal communication).

In 1996 the Wine Institute of New Zealand proposed to Government a set of labelling reforms. These proposals provided that firstly at least eighty five per cent of any wine carrying a registered geographic name must be from the stated wine region. Secondly this same percentage was also to apply to both varietal and vintage claims. These proposed variations have been postponed until a wine treaty agreement, currently under negotiation, is reached with the European Union. This procrastination in the implementation of recognised wine regions within New Zealand and the accomplishment of more stringent controls over wine authenticity have been frequently criticised by the industry (New Zealand Herald, 2000; Dunleavy, 1999). Currently MAF Discussion Paper No 22. (2000) covers most of these criticisms and it is hoped by the Industry that a bill will be introduced into the New Zealand Parliament during 2004 to rectify these deficiencies and to simplify the administration of the wine industry which is currently supervised by four government departments (Ministry of Justice - administers the Wine Makers Act, 1981; Ministry of Health - issuing of export certificates; New Zealand Customs Service - enforces border control on wine exports; Ministry of Agriculture and Forestry - administers the Wine Makers Levy Act, 1976).

As well as local body requirements the 1991 Resource Management Act (RMA) governs the location of both new and expanded vineyards or wineries, providing for an objection process for those directly effected and for the protection of the natural environment.

8.6 Wine Industry Organisation

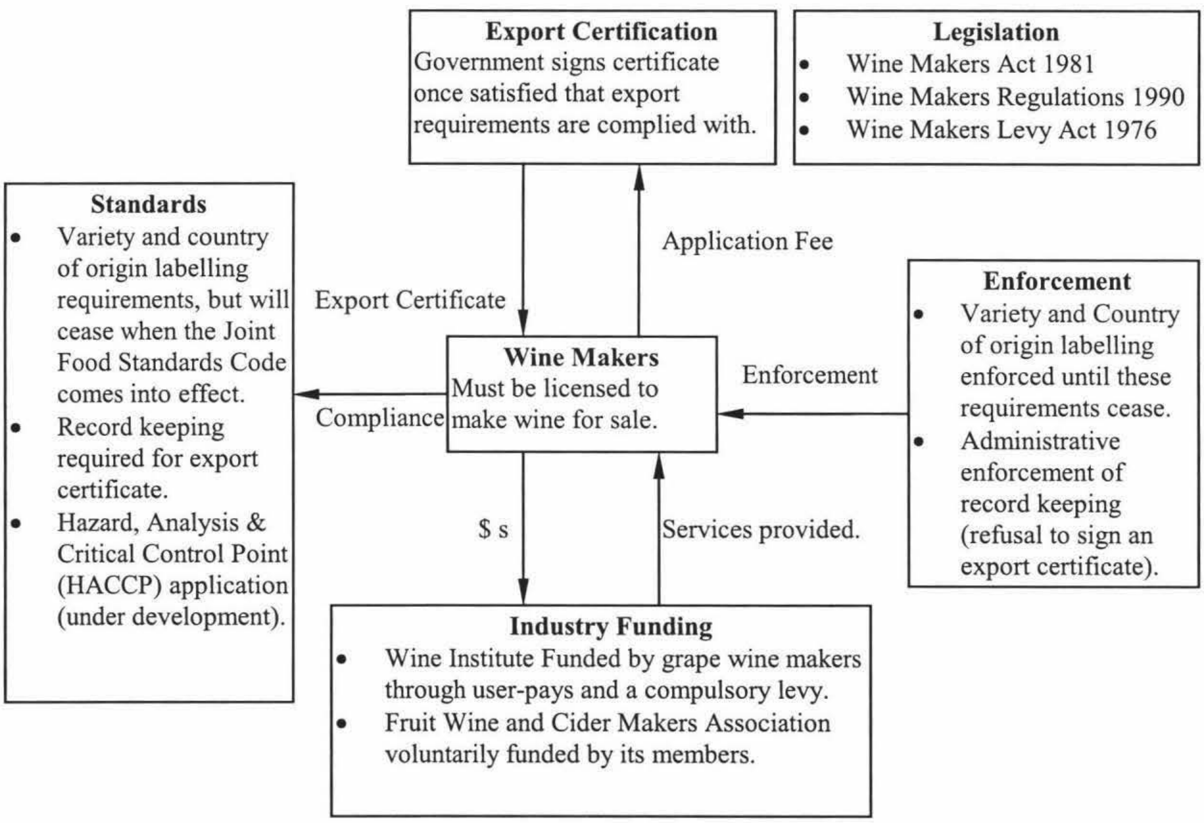
The first industrial organisation for the wine industry was the Viticultural Association. In 1943 a number of smaller wineries broke away to form the New Zealand Wine Council. As a result of the threat of cheap imports from Australia they again united to form the Wine Manufacturers Federation with a splinter group founding the New Zealand Grape Producers and Wine Manufacturers Association Inc. (Scott, 2002). These two groupings respectively evolved into the Wine Institute of New Zealand Inc. and the Grape Growers Council.

The Grape Growers Council (GGC) originally represented the viticultural side of the industry. This organisation, funded by a levy, provides an effective governmental lobby for growers' interests as well as providing viticultural research and disseminating this amongst its members. Although most wine-makers are also growers, a large group of contract grape growers also exist, which between them supply sixty per cent of New Zealand's wine grapes.

The Wine Institute of New Zealand (WINZ) was originally incorporated in 1976. Originally designed to represent wine-makers collectively as well as providing an effective lobby grouping, the institute later provided a continuous flow of information to its members. Governmental recognition was given to WINZ by the Wine Makers Levy Act 1976. This provided for the initial funding of WINZ by wine producers. The Commodities Levy Act (1990) forms the legislative basis of the current levy systems of all commodity based industries. The 1998 Commodities Levies (Winemaking Grapes) Order was made under the auspices of this Act. Funding of the Institute, is by a compulsory levy, based on the annual sales of all grape wine-makers of 1.325 cents per litre.

Originally Winegrowers of New Zealand gathered statistics and undertook joint research projects for both industry groupings. Additionally, as well as providing a communication channel between the two groups it also presented a united front for all matters of joint concern of both the viticultural and oenological sides of the wine industry. Following a successful period of cooperation between its two membership components it was decided to merge WINZ and GGC in March 2002 to form New Zealand Winegrowers (NZWG) (New Zealand Herald, 2002a) representing four hundred wine-makers and six hundred grape growers. An executive officer manages NZWG on a daily basis with a permanent staff of twelve while a directorate of twelve (seven from WINZ and five from GGC) initiates its broad direction. Members of the directorate representing WINZ are elected according to the categories of membership (see Table A.6 of Appendix A). The GCC elects its board members based upon the grape growing regions and their importance.

Figure 8.0 Current Industry Organisation and Governmental Relationships



(Source: MAF Discussion Paper No. 22 (derived), 2003).

The GCC elects its board members based upon the grape growing regions and their importance.

The New Zealand Wine Guild was originally formed in 1991 with the objective of developing a joint marketing and promotional programme for New Zealand wines in the United Kingdom. It replaced an *ad hoc* agreement previously in existence between the major wine exporters. Now an integral part of WINZ the

Guild has always maintained staff in the UK and has fifty-seven wineries as full members who fund it. The Guild is not a single desk selling organisation.

The New Zealand Grape Vine Improvement Group Incorporated consists of regionally based groups of viticulturists established to identify and distribute new, improved vine varieties or clones. These groups are fundamental to improving the quality of the grapes produced in New Zealand vineyards and hence of the resulting wines. Groups based in Auckland and in Hawkes Bay have proven to be the most active.

The New Zealand Society of Viticulture and Oenology is a voluntary grouping comprising wine industry professionals, researchers, academics and others associated with the industry; established a number of years ago, it disseminates technical and other industry information. Major symposiums are held frequently in association with WINZ.

8.7 Summary

Consideration of the historic development of both governmental laws and regulations is needed in order to understand the current characteristics and organisation of the New Zealand wine industry which acts as a backdrop to wine tourism as presently existing within the Auckland Wine Region.

The anti-alcohol conservatism of New Zealand's society was reflected historically by governmental legislation based upon a perceived "public good" in its alcohol policy. Over the years this has been balanced against the need to raise an increasing stream of taxation revenue by heavily taxing products containing alcohol.

Until 1955 legislation was largely restrictive towards the expansion of the wine industry. During the last fifty years however, there has been a progressive relaxation of these restrictions with regard to distribution outlets, purchaser age restrictions, licensing hours and product types containing alcohol available for sale. The resulting laws, together with their related regulations, have impacted considerably on the wine industry, its structure, organisation and its relationship with central and local government. Currently laws and regulations control the general domains of wine production, labelling, cellar-door sales and export certification.

New Zealand's wine industry, fostered initially by protectionism, passed through a stage of low quality, high volume production, with few exports. Following the removal of this protectionist environment and Governmental implementation of a development plan, the wine industry has more latterly thrived as it was forced to compete with an increasingly greater volume of cheap imports, especially from Australia. The export successes of high value premium wines, mainly to European markets, has been the result.

New Zealand has yet to introduce a comprehensive appellation system with appropriate labelling regulations, as is common in most wine producing countries. Designed to reassure wine purchasers of the authenticity and quality of wines produced, such legislation, although proposed has yet to become law.

The history of New Zealand's wine related legislation, which eventually developed into the current legislation, together with an understanding of the formal organisation of the wine industry within the country provides a background for assessing the current state of wine tourism within the Auckland Wine Region.

Chapter nine: Research Design

9.0 Introduction

With a background of diverse academic disciplines, tourism researchers, largely reflect the interdisciplinary nature of the industry itself. Accordingly tourism research has in the past tended to be narrowly focused, too dependent upon case studies and generally lacking in detailed analysis. More recently a number of theorists (Leiper, 1990; Shaw and Williams, 1990; Urry, 1990; Goodall *et al.*,1988) have adopted a systems approach, based upon a supply and demand market model, the components of which are capable of being analysed in depth, thereby resulting in a more holistic understanding of the topic studied.

In the past tourism research has been somewhat restrictive and the approach chosen reflective of the primary academic discipline of the researcher. To date research on wine tourism has largely reflected these trends, with individual studies focusing on particular aspects of what are effectively only components of a market model.

The methodology utilised in this particular research is designed to embrace all aspects of the wine tourism market in the Auckland region.

9.1 Basis of Tourism Research

It has generally been recognised that there is no unified theory of tourism. Rather, the theoretical basis of tourism consists of an amalgam of concepts derived from a number of disciplines. Geography, sociology, economics anthropology and psychology were originally identified by Jafari and Ritchie (1981) as contributing to the underlying theory. This selection of disciplines was later modified by Sinclair and Stabler (1991) to include marketing but excluding anthropology, while Page (1995) considered that only geography and management science should be included. Because of the number of academic disciplines contributing to the study of tourism, much of the research to date has been fragmentary. The approach employed by various researchers has depended not only on the topic being researched but also on the background of the researcher (Graburn *et al.*, 1991; Dann *et al.*, 1988).

Tourism research can generally be allocated into one of three broad subject groupings. The first of these relates to environmental, economic, social and cultural impacts. The second category is concerned with specific sectors of the tourist industry centering upon the marketing and management science aspects of those segments. The final category relates to both the interactions and the spatial development aspects of tourism (Veal, 1997; Sinclair and Stabler, 1991).

A number of problem areas in tourism research have been identified in the literature. The diverseness of the industry, its unorganised nature, the insufficiency of credible measures, its geographical basis and its perceived future importance were recognised by Smith (1995) as contributing factors to difficulties in tourism research. These difficulties have manifested themselves by leading to a narrow focus with excessive reliance upon a case study approach, which fails to recognise the interdisciplinary nature of tourism itself or to provide an in-depth analysis of the problem being researched (Page, 1995).

Accordingly both quantitative, qualitative and experimental traditions exist within tourism research (Veal, 1997). The quantitative paradigm is largely based upon large numbers of respondents and is concerned with the creation of predictive models of human behaviour. The qualitative tradition is based upon obtaining subjective evidence from small groups of "real" people and is designed to explain behaviour rather than to predict it. Experimental methods of research, derived from the physical sciences, endeavour to compare control groups with subject groups in an attempt to either prove or disprove hypotheses. Such hypotheses are tested by varying appropriate conditions as between the two groups and comparing the outcomes (Zikmund, 2003).

Data used in research may be either primary or secondary. If existing suitable data is available then clearly the use of such secondary data is more cost effective. More commonly a combination of primary data, collected by the researcher, together with secondary data (Example: governmental statistics), may be utilised during the research (Veal, 1997).

The gathering of data of tourism phenomena presents a number of specific problems depending upon the method used. The two main methods of data collection employed are self reported data (surveys or interviews frequently on site) and observational data gathering. The disadvantages of self reported data gathering relates to the honesty and accuracy of the respondents. Dishonesty in this regard may be deliberate or unwitting on the part of the respondent. The accuracy of observed data depends mainly on the ability of the researcher acting in an observational role (Veal, 1997).

In an attempt to adopt a broader approach to the problems of tourism research a systems approach has been advocated by a number of writers. This approach, based upon an "opportunity sets framework", provides an overall supply and demand market model, the components of which can be further analysed in greater detail. This type of methodology, originated by Goodall *et al.* (1988), was both developed and refined by other writers (Leiper, 1990; Shaw and Williams, 1990; Urry, 1990).

9.2 Wine Tourism Research

As noted above, in common with most tourism studies, much of the research to date has related to particular aspects only of the wine tourism market. Case studies of particular wineries (Asian Business, 1997; Steinauer, 1997; Fisher, 1996), regional descriptions of wine regions in Europe, the United States Australia, New Zealand and even cyberspace (Wojcik, 1998; Macalister, 1998; Dutton, 1997; Hapgood, 1996; Gilbert, 1992), wine marketing utilising tourism

(Landon *et al.*, 1998; Lemon, 1997; Miller, 1996; Hickle, 1988), concept descriptions/comparisons (Hall and Macionis, 1998; Dowling, 1998; Rutzou, 1997; Macionis, 1997), producer surveys (Hall and Macionis, 1998; Hall, 1996; Reid, 1990), consumer surveys (Beverland *et al.*, 1998a, b; Dodd, 1997; Dodd and Bigotte, 1995) and inter-industry relationship descriptions and surveys (Macionis, 1997). Generally speaking the consumer surveys have been either self-completed site surveys or more commonly based on winery surveys/structured interviews, while the producer surveys have been either self completed surveys or based on structured interviews.

The first two books devoted entirely to the study of wine tourism were published only in 2000. These publications offer theoretical models of the topic as well as a comprehensive review of the many aspects of wine tourism in differing wine producing regions of the world. (Hall *et al.*, 2000b; Getz, 2000).

Taking into account the methodologies used in wine tourism research to date, this present research is designed to adopt a market analysis approach by examining in depth the various components of the wine tourism market in the Auckland Region. Accordingly site surveys of both the demand side of the market (wine tourists) and the supply side (wineries) have been undertaken. Different aspects of these surveys are now considered in detail.

9.3 Participants

With regard to the consumer survey, it was decided that because of the nature of the survey that self-completion of questionnaires by respondents (being winery visitors) adjacent to winery premises would be the best approach. A supervisor would be available to both administer and assist.

With regard to the producer survey, a list of all producing wineries in New Zealand was obtained through two sources:

- Listings included in the *Wine Atlas of New Zealand*, (Cooper, 2002).
- Listings supplied by and included in the *Annual Report of New Zealand Wine Growers* (New Zealand WineGrowers, 2002).

In total there were around four hundred wineries in the country of which approximately sixty were in the Auckland Region (the number of wineries is in a constant flux due to business sales and mergers). It was decided to include all listed wineries in the Auckland Region in the study. Eventually a list of sixty-six wineries in the Auckland Region were included in the survey (see Appendix D).

9.4 Sampling

With regard to the consumer survey a method of random selection of respondents was devised as follows:

- All wineries in the Auckland Region (see Appendix D) were numbered. The survey was designed to take place over a three-month period (April 1 - June 30, 2003) and the days of the survey were numbered from one to ninety-one. Additionally the timing of the visits were based on times between 9:00 a.m. (0900) and 4:00 p.m. (1600). A computer program was written based upon the computer's random number generator (using a random seed). The result being a print-out listing randomly selected numbers within each appropriate range for "winery number"(1 - 66), "day of visit" (1 -91) and "time of visit" (0900 - 1600). The period to be spent at each winery was to be two hours only. In the event of a timing clash occurring a further random selection would be utilised (see Appendix I). Each winery would be visited once only for the purpose of administering the consumer surveys.
- As prospective respondents emerge from the winery door every tenth winery visitor would be approached during the two hour period allocated for the administration of the questionnaires (see Appendix G) at each winery. Two interviewers are to be utilised at each winery to avoid overlapping of respondents by one interviewer (see Appendix I).

In surveys of this type, where samples are selected randomly the range of sampling error can be calculated according to the laws of probability and statistical theory. The actual population of winery visitors is clearly unknown. Accordingly extreme care (outlined above) has been taken to ensure absolute randomness of the sample selection with the expectation that a sample of approximately three hundred visitors should be sufficient to reach valid and reliable conclusions about the specific population of winery visitors (see Section J.0 of Appendix J).

With regard to the producer survey each of the wineries scheduled in Appendix D were mailed a questionnaire, designated "Questionnaire Two" (see Appendix H), and from the responses follow up interviews were arranged with all of those wineries responding positively.

9.5 Design of Questionnaires

The layout and design of each questionnaire (see Appendix G and Appendix H) was derived from the outcome of two focus group meetings each of which comprised five people having a range of expertise in both the wine industry as well as in business management of wine industry enterprises. The focus group members indicated that they preferred not to be individually identified. The rationale for utilising a focus group to assist in the design of the questionnaire content was based on the success of such groups in other studies (Sherraden and Beverly, 1998).

Both focus group meetings, each of approximately two hours duration, were conducted as free-flowing interviews. This form of information collection has become increasingly popular as an exploratory research tool and more recently has often been utilised for both concept screening and refinement (Zikmund, 2003). More particularly focus group discussions have been found to be applicable when the researcher is unsure of the precise issues and nuances that would permit a more specific research technique (Sherraden and Beverly, 1998).

Thus in the early stages of research on a particular topic, the focus group method is particularly advantageous to both collate appropriate information as well as to lay the foundations for more precise evaluation methods. Not only has this method been successfully applied in the development of market research questionnaires but also it has been utilised in generating useful questions for structured interviews (Topor, 1998; Sherraden and Beverly, 1998; New Jersey Institute of Technology, 1998). Following the preparation of draft questionnaires the focus group was, at the second meeting, used to both review the contents as well as to ensure that both coverage and clarity were satisfactory. Using focus groups allowed a practical assessment of the theoretical ideas behind the research, against the "reality" of the industry.

There are advantages to using focus group interviews over other forms of exploratory analysis as follows:

- They are relatively brief to conduct, easy to execute, the information obtained is quickly analysed and the cost of setting up the group meeting is minimal (Sherraden and Beverly, 1998).
- Advantage is taken of group synergism, whereby a combined effort tends to produce a wider range of information, insights and ideas than does an accumulation of separate individual responses (Sherraden and Beverly, 1998).
- During focus group meetings the researcher can probe for clarification or greater detail and unanticipated but potentially fruitful lines of discussion can be pursued (Sherraden and Beverly, 1998).
- Focus groups are more likely to result in spontaneity since no one individual is expected to respond to any specific question. In the group situation individuals are likely to respond because they hold a definite view about the subject thereby providing more accurate information on their position on specific issues (Zikmund, 2003).

There can however be disadvantages in using the focus group approach as follows:

- Unless the group is well controlled, dominant participants may override other group members which could possibly lead to some group members acting negatively towards those dominant participants (Sherraden and Beverly, 1998).
- Individual responses may not necessarily be independent of one another, with "peer" pressure causing modification of participants stated views

being a possibility (Sherraden and Beverly, 1998).

- Because focus group participants are not randomly sampled from the population, information gained from the focus group meeting cannot be used to freely generalise about the views of the entire population (Sherraden and Beverly, 1998).

Accordingly the findings from focus group discussions are useful for general information, but do not suffice to give absolute projectionable and quantifiable information. Based on the information recorded it is then possible to design items for a survey that will provide sufficient information to reach conclusions about the population under study (Topor, 1998).

9.6 Finalisation of Research Questions and Item Development

The focus group discussions were led in a logical manner with progress being guided from general matters of interest to the more specific. Discussion tended to centre around tentative hypotheses put forward by the participants regarding the research questions and their views of "the real world". It was determined early on in the discussion that the three questionnaires should have the following characteristics:

- With regard to the consumer questionnaire (Questionnaire One), it was determined that in spite of the presence of a person to assist respondents, that the questionnaire be set out in such a way that would be both easy to complete and not require a large amount of time and effort by respondents. Agreement was reached that a "brochure" type format with mainly closed questions be utilised.
- With regard to the first producer questionnaire (Questionnaire Two) - this was merely an initial contact designed to ascertain which wineries encouraged visitors and to ascertain the degree of cooperation available for a follow-up questionnaire/interview. Accordingly a simple mail-out questionnaire was considered appropriate.
- With regard to the second producer questionnaire (Questionnaire Three), that as an interviewer would always be present then a more "structured interview" type format could be utilised.

It is essential that the analysis of the focus group results must be systematic and verifiable. To this end the information from the group's discussion was summarised on a word processor after the meetings from both notes and taped comments. All tapes were later destroyed. The notes were then broken down into five categories:

- General comments about the industry.
- References to wine consumer behaviour and market segmentation.
- References to viticulture.
- References to wine-making, wineries, winery attributes and winery facilities.
- References to tourism, especially tourist attractions and specifically wine tourism.

This information was then reviewed and interpreted in order to construct relevant questions. The questions were designed to cover the different hypotheses developed by the group and provide sufficient information to answer the research questions related to wine tourism in the Auckland Region:

- What are the characteristics of visitors to wineries ?
- What are the attributes of wineries considered by visitors to be the most important?
- Do wineries wish to attract additional visitors? Can wineries attract greater levels of visitation by providing further facilities and by using market segmentation for promotional purposes?
- What levels of networking currently exists as between wineries (Example: wine trails) and as between the wine and tourist industry generally? How can these be enhanced in the future to further promote wine tourism?

9.7 Procedure

A copy of the consumer questionnaire is included in Appendix G (Questionnaire One) and copies of both producer questionnaires are include in Appendix H (Questionnaires Two and Three). Instructions related to the administration of both Questionnaires One and Three are included in

Appendix I.

Questionnaire One was undertaken as a site survey, with assistance available, being a form of survey fairly common in leisure and tourism research. The *advantages* of this type of survey are:

- As visitors are approached on site a high response rate can be anticipated.
- As a person is available to assist and interpret, items confusing to the respondent can be explained and resolved quickly.
- Other types of survey (Example: mail) can give skewed results as those better educated are more likely to respond.
- A longer questionnaire is made more possible than by using a mail survey.
- Follow ups of respondents are not required.
- The experience of the respondent being surveyed has happened immediately prior to the survey.

The *disadvantages* of site surveys are:

- Non participants are not surveyed (as to their non-participation).
- The costs are generally greater than other survey forms.
- The sample with regard to both size and dispersion is more limited.
- Respondents may feel pressured as they are restricted in the time available to think about their responses or ability to consult others because of time limitations.
- This form of survey restricts contact with all potential respondents, some of whom may be inaccessible because of geographic location and work commitments.

(Zikmund, 2003; Easterby-Smith, 2002; Brunt, 1997; Veal, 1997; Cooper and Emery, 1995)

Questionnaire Three was administered as an interviewer completed survey including elements of a structured interview. The advantages and disadvantages (where appropriate) being similar to the above, although the respondents are necessarily restricted to a relatively small number of winery owners/managers.

These factors were all taken into account and the questionnaires were each designed to minimise these weaknesses. The steps taken included the following:

- Closed questions only were used in each of the surveys and in the case of a small number of questions where an alternative option was a possibility then an "other" option was provided together with an explanatory "give details" line that was also provided. The advantages of this approach were that:

  - ➢ The analysis of closed questions is less costly and easier to code and analyse.
  - ➢ The questions can include scaled items where the response can be anticipated.
  - ➢ The questions can cover a wider field more systematically with reasonable comprehensiveness relatively quickly.
  - ➢ The responses are generally more reliable than those from open-ended questions.

- The questions were presented in three basic formats:

  - ➢ Closed questions requiring a Yes/No/Declined answer.
  - ➢ Those questions requiring respondents to rank their views by way of a five point Likert scale. The Likert scale is used as a measure of attitudes or opinion ranging from negative to positive that allows respondents to indicate how strongly they agree or disagree with specific statements.
  - ➢ Those questions in which a finite selection of ranges was offered by way of a response, requiring the respondent to check an appropriate box .

- The two major questionnaires (Questionnaire One and Questionnaire Three) were printed in booklet format, to make the questionnaires look more professional. It has been found that almost anything that makes a questionnaire look more professional, more personalised, or more attractive will have a positive effect on the respondent (Fowler, 1995). The advantages of this type of format are as follows:

    - It improves the ease of reading.
    - It prevents pages being lost or misplaced.
    - It is easier for respondents to turn the pages.
    - A double page format can be used.
    - It looks professional and is easy to follow.
    - The questionnaire can be printed on both sides of the pages which reduces costs and makes the questionnaires look smaller.

    (Sudman and Bradman, 1982)

- Contact numbers (phone, fax, e-mail) were provided to allow respondents to query any part of the major surveys at a later date.

- The questionnaires were designed to be easy for participants to complete with respondents only having to check appropriate boxes. Questionnaire One, the consumer questionnaire, was divided into four sections designed to make the questionnaire easier to answer and in order to avoid confusion. The divisions were as follows:

    1. General information
    2. Particulars of visit to Auckland (omitted by Auckland residents).
    3. Wine consumption experience.
    4. Winery visitation experience.

Questionnaire Three, the major producer questionnaire, was divided into five sections as follows:

1. General information.
2. Viticultural information.
3. Winery facilities, attributes, advantages/disadvantages and promotional.
4. Established wine industry and tourism industry networks.
5. Wine tourism sales and overall statements.

9.8 Ethical Considerations

Because of the nature of the research it was decided that approval of the ethics committee would not be necessary. The confidentiality of respondents were respected at all times and this was advised to all respondents who were approached with regard to both surveys. Respondents were advised of the nature of the research, the purposes for which it would be used and supplied with contact addresses which they could use in the future. Respondents were always completely free to terminate their participation at any time (see Sections I.0.3, I.0.5, I.1.1 and I.1.3 of Appendix I).

9.9 Summary

There is no general theory of tourism as it is a mixture of concepts derived from the disciplines of sociology, psychology, geography, management science, economics and anthropology. The three broad areas of tourism research are its various impacts both positive and negative, specific sectors of the tourism industry and interactional and spatial developmental aspects.

The difficulties identified in tourism research are the unorganised nature of tourism, its diversity, its geographical basis, its insufficiency of credible measures and its projected future importance. More recently a number of theorists have adopted a systems approach, based upon a supply and demand market model, the components of which are capable of being analysed in depth, thereby resulting in a more holistic understanding of the topic studied. The primary discipline of the researcher involved tends to influence the topic chosen for research and the methodology selected. Qualitative, quantitative and experimental methodologies have all been used by tourism researchers. Data may be either primary or secondary and the collection methods of primary data can be either self reported or observational.

Wine tourism research to the present time has mainly related to particular aspects of the wine tourism market, wine marketing with tourism added, regional descriptions of wine tourism, concepts/definitions/comparisons, producer surveys, consumer surveys and surveys of inter-industry relationships.

When conducting research it is critical that the research methodology chosen is appropriate to the subject being studied. To ensure that this occurs focus groups are frequently employed as they provide an independent viewpoint with regard to both research design, question design and the development of the final research questions under study. The focus group used assisted in all of these aspects, with a market analysis approach eventually being adopted in order to examine in depth the components of the wine tourism market-place of the Auckland Wine Region. For this present research a quantitative approach was chosen for both surveys. Site surveys of randomly sampled consumers (self-completion questionnaires) and producers (structured interviews) were thought by the focus group to be the most appropriate.

The design of the questionnaires were based upon the "Total Design Method" of Cooper and Emory (1995), with the intention of maximising valid responses. Copies of the questionnaires (utilising mainly closed questions) provided in Appendix G and Appendix H were actually printed as brochures, folded to half sized A4 paper and printed double sided. This professional approach was expected to yield the greatest number of valid responses while minimising costs. Finally, ethical issues were also discussed.

Chapter ten: Results of Consumers' Survey

10.0 Introduction

Pertaining to the demand side of the wine tourism market model (see Figure 4.0 of Chapter 4) the research questions posed were as follows (see Section 9.6 of Chapter 9):

- What are the characteristics of visitors to wineries ?
- What are the attributes of wineries considered by visitors to be the most important?

Data collected during the course of the wine tourism consumers' survey was analysed in order to provide answers to these research questions. The Auckland Wine Region is composed of five distinct sub-regions, geographically separated from one another and each possessed of unique features. Accordingly survey results were generally analysed and presented by sub-region as well as for the region as a whole.

Survey results are shown as frequency distributions in table form, ranked tables and Likert score tables. Statistical measures of central tendency and skewedness are used to illustrate differences between the results obtained for wine tourists and those known about the general New Zealand population.

Where appropriate, results obtained are compared and contrasted with other published studies, both in New Zealand and overseas. In order to obtain predictors of wine tourism behaviour, the survey contained a number of distinct themes. These include demographic characteristics, socio-economic characteristics, wine knowledge, motivations, information sources used, past wine experience, winery attributes and their significance, wine and other purchases made during the course of the visit and a final evaluation of the winery visit made by the wine tourist.

10.1 Administering the Survey Instrument

The survey was carried out between April 1 and June 30, 2003. Appendix G contains a copy of the survey instrument and Appendix I a copy of the instructions to interviewers. Participants involved and sampling methods used in the survey, were previously discussed (see Sections 9.3 and 9.4 of Chapter 9). The minimum sample size required at a maximum error level of 2% ($p<.002$), was calculated at 358 and the number of wine tourists to be approached was calculated as a minimum of 542 (see Section J.0 of Appendix J).

The only problem encountered during the survey was the effect of the weather on the flow of visitor numbers. This flow was noticeably less on days with inclement weather. As the sampling was random (one in every ten visitors), this meant that results for some wineries were based on lower absolute numbers of visitors, as two hours was the time allocated for sampling at each winery. This was not considered important, as wineries regardless of sub-region were randomly selected at random times on random days independently of weather.

Table 10.0 Participation rate by wine sub-region

Auckland Wine sub-region	No. of Wineries Total	No. of Wineries Participating	No. of Winery Visitors Approached	No. Of Visitor Respondents	Response Rates Wineries	Response Rates Visitors
Henderson /Henderson Valley	19	16	191	123	84%	64%
Kumeu /Huapai /Waimauku	11	10	133	101	91%	76%
Matakana/Mahurangi	10	8	93	65	80%	69%
South Auckland	8	6	68	41	75%	60%
Waiheke Island	18	11	84	73	61%	87%
Totals	**66**	**51**	**569**	**403**	**77%**	**71%**

Table 10.0 sets out the participation rates for both wineries and visitors. Of the sixty-six wineries in the Auckland Wine Region, twelve advised that they did not really participate in wine tourism, in that they rarely encouraged visitors, as they had only minimal facilities for tasting or cellar door sales. Only three with suitable facilities advised that they were not interested in participating. Of the visitor respondents, all self-administered responses were valid, as they were completed fully in the presence of a questionnaire reviewer, who was

always available for assistance and checking. Although both the winery and visitor response rates varied considerably by sub-region, at 77% (for wineries) and 71% (for visitors), overall participation rates were quite acceptable. While response rates of up to 90% are achievable in supervised, self-administered surveys, results greater than 66% are nevertheless more than satisfactory (Zikmund, 2003; Easterby-Smith *et al.*, 2002). The data collected from this wine tourism consumer survey were entered and analysed using the statistical program *Minitab Version 12.1* An analysis of the results follows.

10.2 General Demographic Characteristics of Wine Tourists in the Auckland Wine Region

Table 10.1 sets out the demographic characteristics of gender, age groupings and highest educational achievement for both the Auckland and New Zealand adult (18 years or older) populations, originally based on census data but

Table 10.1 General demographic characteristics of Auckland's and New Zealand's adult population

Demographic	Auckland (Census)	New Zealand (Census)
Gender		
Female	51%	51%
Male	49%	49%
Total	**100%**	**100%**
Age Range		
< 21 (18 – 20)	4%	4%
21 -30	18%	16%
31-40	23%	20%
41-50	20%	19%
51-60	14%	15%
61-70	11%	13%
>70	10%	13%
Total	**100%**	**100 %**
Highest Educational Level		
Didn't complete high school	21%	24%
High school graduate	24%	26%
Diploma/certificate	26%	27%
Undergraduate degree	16%	13%
Postgraduate diploma	7%	5%
Postgraduate degree	4%	3%
Other	2%	2%
Total	**100%**	**100 %**

(Source: derived Statistics New Zealand, 2002e) updated annually between censuses (Statistics New Zealand, 2002e).

When compared with the data from the wine tourism consumer survey (see Table 10.2) there are marked variations. Although there is a slight tendency for wine tourists to be female (52%), compared to the population in the census data at 51%, this result does differ considerably from Mitchell (in progress) for Auckland (44%) and New Zealand (49%) and in Longo (1999) female wine tourism participation at 54%. This variability in gender is also illustrated in comparable international studies (see Table 5.3 of Chapter 5). For example for King and Morris (1999) female participation was 52% and for Macionis (1997) it was 47%. It is interesting that there is also considerable gender variations as

Table 10.2 Demographic characteristics of wine tourists in the Auckland Wine Region

Wine sub-region	Henderson/ Henderson Valley n=123		Kumeu /Huapai Waimauku n=101		Matakana/ Mahurangi n=65		South Auckland n=41		Waiheke Island n=73		Totals n=403	
Characteristic	**Freq.**	**%**	**Freq.**	**%**	**Freq.**	**%**	**Freq.**	**%**	**Freq.**	**%**	**Freq.**	**%**
Gender												
Female	66	(56)	53	(52)	30	(46)	22	(54)	41	(56)	212	(52)
Male	57	(44)	48	(48)	35	(54)	19	(46)	32	(44)	191	(48)
Total	**123**	**(100)**	**101**	**(100)**	**65**	**(100)**	**41**	**(100)**	**73**	**(100)**	**403**	**(100)**
Age Range												
<21	6	(5)	6	(6)	4	(6)	3	(7)	9	(12)	28	(7)
21-30	23	(19)	14	(14)	7	(11)	3	(7)	16	(22)	61	(15)
31-40	41	(32)	38	(38)	24	(37)	14	(35)	12	(16)	131	(33)
41-50	34	(28)	27	(26)	18	(28)	10	(24)	11	(15)	100	(25)
51-60	13	(11)	9	(9)	8	(12)	6	(15)	16	(22)	52	(13)
>60	6	(5)	7	(7)	4	(6)	5	(12)	9	(13)	31	(7)
Total	**123**	**(100)**	**101**	**(100)**	**65**	**(100)**	**41**	**(100)**	**73**	**(100)**	**403**	**(100)**
Highest Educational Level												
Didn't complete high school	13	(11)	9	(9)	8	(13)	5	(13)	12	(16)	47	(12)
High school graduate	12	(10)	12	(12)	7	(12)	3	(7)	8	(12)	42	(10)
Diploma/certificate	31	(24)	29	(28)	19	(29)	9	(21)	15	(20)	103	(25)
Undergraduate degree	28	(23)	14	(14)	13	(19)	6	(14)	15	(20)	76	(19)
Postgraduate Diploma	12	(10)	10	(10)	4	(6)	5	(12)	8	(11)	39	(10)
Postgraduate degree	27	(22)	26	(26)	13	(19)	13	(33)	14	(19)	93	(23)
Other	0	(0)	1	(1)	1	(2)	0	(0)	1	(2)	3	(1)
Total	**123**	**(100)**	**101**	**(100)**	**65**	**(100)**	**41**	**(100)**	**73**	**(100)**	**403**	**(100)**

between the various Auckland wine sub-regions, from a high of 56% for female wine tourists in Henderson/Henderson Valley and Waiheke, to a low of 46% in Matakana/ Mahurangi.

With reference to age ranges - wine tourists tend to be concentrated in the middle-aged brackets of 31 to 50 years (58%) compared to the population generally (Auckland = 43%, New Zealand = 39%) (chi square = 87.745, df = 5, p <0.0005). This percentage in the middle-aged range is also comparable to other international studies (see Table 5.3 of Chapter 5), to Beverland's West Auckland study (Beverland *et al.*, 1998a, b) of 41% and to Longo's New Zealand study (Longo, 1999) of 46%. However, Johnson (1998), based on winery owners' perceptions of their visitors, found that this middle-aged range contained only 24% of wine tourists. Variations in age brackets of wine tourists across the Auckland wine sub-regions, with the exception of Waiheke Island, (mid-age range = 31%) showed little variability.

As with all international and other New Zealand studies of wine tourists, educational levels revealed by this survey, reflect those of wine consumers generally - in that they differ from the population markedly (chi square = 96.842, df = 6, p <.0025). Thus wine tourists in the Auckland Wine Region tend to be better educated, with 52% having completed a university degree and an overwhelming 77% holding a tertiary qualification of some type, compared with the 21% and 48% of New Zealand's general population (see Table 10.1).

Table 10.3 Residential characteristics of New Zealand's population

Residential Characteristics	New Zealand (Census)
Large City (more than 250,000)	47%
Medium City (between 50,000 and 250,000)	21%
Small City (between 20,000 and 50,000)	11%
Provincial Town (less than 20,000)	9%
Rural Area	12%
Total	**100%**

(Source: derived Statistics New Zealand, 2002e)

Dodd (1994) noted that of wine tourists in Texas, 60% had at least a bachelor's degree compared to 20.4% of the State's population.

Table 10.3 sets out the demographic characteristic of residence for the New Zealand population based on census data (Statistics New Zealand, 2002e).
An analysis of the consumer survey data (see Table 10.4) shows that 16% of wine tourists in the Auckland region were international visitors, with visitors from Australia, the United Kingdom and North America predominating numerically. In comparison with other New Zealand studies, this result was less than Longo (1999) of 26% and Johnson (1998) of 18% but greater than Beverland *et al.* (1998a, b) at 8%, which included West Auckland wineries only.

Table 10.4 Nationality and residential characteristics of wine tourists in the Auckland Wine Region

Wine sub-region	Henderson/ Henderson Valley n=123		Kumeu /Huapai Waimauku n=101		Matakana/ Mahurangi n=65		South Auckland n=41		Waiheke Island n=73		Totals n=403	
Nationality or residence	**Freq.**	**%**	**Freq.**	**%**	**Freq.**	**%**	**Freq.**	**%**	**Freq.**	**%**	**Freq.**	**%**
New Zealand	110	(90)	87	(87)	51	(79)	25	(63)	60	(83)	333	(84)
Australia	5	(4)	5	(5)	3	(5)	7	(18)	3	(4)	23	(5)
North America	3	(3)	4	(4)	2	(4)	2	(4)	4	(6)	15	(4)
United Kingdom	2	(1)	4	(4)	4	(6)	3	(7)	2	(3)	15	(4)
Other Europe	2	(1)	0	(0)	1	(1)	2	(4)	1	(1)	6	(1)
Japan	1	(1)	1	(0)	2	(3)	1	(2)	1	(1)	6	(2)
Other Asia	0	(0)	0	(0)	1	(1)	1	(2)	1	(1)	3	(0)
Other	0	(0)	0	(0)	1	(1)	0	(0)	1	(1)	2	(0)
Total	**123**	**(100)**	**101**	**(100)**	**65**	**(100)**	**41**	**(100)**	**73**	**(100)**	**403**	**(100)**
Domicile in New Zealand (New Zealand Visitors Only)	**n= 110**		**n= 87**		**n=51**		**n= 25**		**n = 60**		**n=333**	
Large City (more than 250,000)	88	(80)	66	(76)	45	(86)	17	(65)	49	(82)	265	(79)
Medium City (between 50,000 and 250,000)	12	(10)	7	(8)	3	(5)	2	(9)	3	(5)	27	(8)
Small City (between 20,000 and 50,000)	4	(4)	1	(1)	1	(3)	2	(9)	2	(3)	10	(3)
Provincial Town (less than 20,000)	3	(3)	1	(1)	1	(3)	1	(5)	2	(3)	8	(3)
Rural Area	3	(3)	12	(14)	1	(3)	3	(12)	4	(7)	23	(7)
Total	**110**	**(100)**	**87**	**(100)**	**51**	**(100)**	**25**	**(100)**	**60**	**(100)**	**333**	**(100)**
Day -trippers (residing in Auckland)	94	(85)	73	(83)	39	(76)	17	(65)	46	(77)	269	(76)
Inter-regional visitors	16	(15)	14	(17)	12	(24)	8	(35)	14	(23)	64	(24)
Total	**110**	**(100)**	**87**	**(100)**	**51**	**(100)**	**25**	**(100)**	**60**	**(100)**	**333**	**(100)**

Of the wine sub-regions of Auckland, South Auckland, within close proximity of Auckland's international airport, unsurprisingly attracted the highest level of international visitation at 37% and Matakana/Mahurangi *en route* to the popular Bay of Islands' tourism area, the second highest at 21%.

Much of the literature suggests that wine tourists tend to originate from urban areas with high population levels (Getz, 2000; Hall *et al.*, 2000b; Maddern and Golledge, 1996; Dodd, 1995). This is particularly the case with those wine regions that are easily accessible from large cities. A comparison of the population distribution from Statistics New Zealand (2002e), shows that the residence of Auckland's wine tourists differs greatly from the population at large (chi square = 119.794, df = 4, $p < .0005$). Within a New Zealand context, the Auckland Wine Region, situated adjacent to the country's largest city, is probably unique, with the possible exception of Wairarapa, adjacent to Wellington (Hall, 1996). Of New Zealand residents (n = 333), overall the Auckland Wine Region attracts 79% of its visitors from large cities with day-trippers from Auckland representing 76% of all visitors and inter-regional visitors 24% only. The South Auckland sub-region at 35% inter-regional visitation, probably reflects the domestic traffic through the adjacent airport. International studies of wine regions adjacent to large cities are roughly comparable with regard to inter-regional visitation (Examples: Melbourne in Maddern and Golledge (1996) at 21%, Canberra in Macionis (1997) at 24%).

10.3 Socio-economic Characteristics of Wine Tourists in the Auckland Wine Region

Table 10.5 shows the socio-economic characteristics of occupation, and annual income groupings for both the Auckland and New Zealand populations. This was originally based on census data but with regard to income levels is updated annually between censuses (Statistics New Zealand, 2002e).

From Table 10.6, with reference to occupation, 58% of wine tourists in the Auckland Wine Region describe themselves as either professional or managerial compared to only 8% of the population from the census data for

Auckland and 5% nationally (chi square = 89.56, df = 9, $p < .0025$). This is comparable to Mitchell (in progress) for Auckland of 59% and nationally of 61% and Beverland *et al.* (1998a, b) for West Auckland of 66%. The same tendency for wine tourists to be mainly professional or managerial has also been noted by most other international surveys of wine tourists (Examples: Macionis, 1997; Maddern and Golledge, 1996; Dodd, 1995). Similarly annual income levels are reflective of this occupational status concentration, with 46% of Auckland's

Table 10.5 Socio -economic characteristics of Auckland's and New Zealand's population

Demographic Occupational/Income	Auckland (Census)	New Zealand (Census)
Professional/Managerial	8%	5%
Other white collar	6%	5%
Skilled	14%	15%
Semi-skilled	15%	11%
Unskilled	14%	17%
Home maker	10%	12%
Retired	9%	10%
Student	7%	5%
Self Employed	8%	9%
Unemployed and other beneficiaries	9%	11%
Total	**100%**	**100%**
Annual Income		
< 20,000 $NZ	46%	51%
20,001-30,000	20%	23%
30,001-40,000	11%	10%
40,001-50,000	10%	7%
50,001-65,000	7%	5%
>65,000	6%	4%
Total	**100%**	**100%**

(Source: derived Statistics New Zealand, 2002e)

wine tourists having annual incomes in excess of NZ$50,000 compared to only 13% of Auckland's population and 9% of the New Zealand population (see Table 10.5) (chi square = 105.513, df = 5, $p < .0005$). From Table 10.6 the Waiheke sub-region at 52% had the largest percentage of frequencies of respondents with annual incomes above NZ$50,000. Interestingly the Waiheke Island sub-region also had the highest proportion of respondents in the lowest income bracket (12%). Also on Waiheke, retired people (12%) figure largely in the occupational groupings as compared to the Auckland Wine Region as a whole of 8%. The same tendency for wine tourists to have considerably higher incomes than the population generally, has also been noted by most other international surveys of wine tourists (Examples: Macionis, 1997; Maddern and Golledge, 1996; Dodd, 1995; Folwell and Grassel, 1989). For example Dodd (1995) found that although the median income in Texas is only US$31,553, in fact 70.1% of wine tourism survey respondents indicated an annual income of greater than US$39,999.

Table 10.6 Socio-economic characteristics of wine tourists in the Auckland Wine Region

Wine sub-region	Henderson/ Henderson Valley		Kumeu /Huapai Waimauku		Matakana/ Mahurangi		South Auckland		Waiheke Island		Totals	
	n=123		n=101		n=65		n=41		n=73		n=403	
Occupational Status	**Freq.**	**%**	**Freq.**	**%**	**Freq.**	**%**	**Freq.**	**%**	**Freq.**	**%**	**Freq.**	**%**
Professional/Managerial	67	(55)	62	(61)	42	(64)	20	(48)	49	(68)	240	(58)
Other white collar	12	(10)	8	(8)	5	(7)	4	(10)	2	(3)	31	(7)
Skilled	10	(8)	5	(5)	3	(5)	3	(8)	3	(4)	24	(6)
Semi-skilled	6	(5)	5	(5)	2	(4)	0	(0)	1	(1)	14	(4)
Unskilled	4	(3)	2	(2)	1	(2)	5	(12)	1	(1)	13	(4)
Home maker	3	(2)	3	(3)	3	(5)	1	(2)	3	(4)	13	(4)
Retired	12	(10)	8	(8)	6	(9)	3	(8)	9	(12)	38	(8)
Student	4	(3)	2	(2)	1	(1)	1	(2)	2	(3)	10	(4)
Self Employed	5	(4)	5	(5)	2	(3)	3	(8)	3	(4)	18	(5)
Declined	0	(0)	1	(1)	0	(0)	1	(2)	0	(0)	2	(0)
Total	**123**	**(100)**	**101**	**(100)**	**65**	**(100)**	**41**	**(100)**	**73**	**(100)**	**403**	**(100)**
Annual income level (NZ$)												
< 20,000	11	(9)	10	(10)	6	(9)	4	(11)	9	(12)	40	(10)
20,001-30,000	15	(12)	9	(9)	7	(10)	5	(12)	6	(8)	42	(11)
30,001-40,000	16	(13)	15	(15)	9	(14)	6	(15)	7	(9)	53	(13)
40,001-50,000	28	(23)	18	(18)	13	(20)	9	(23)	14	(19)	82	(20)
50,001-65,000	18	(15)	14	(14)	10	(15)	6	(15)	10	(14)	58	(14)
>65,000	35	(28)	35	(34)	20	(32)	11	(24)	27	(38)	128	(32)
Total	**123**	**(100)**	**101**	**(100)**	**65**	**(100)**	**41**	**(100)**	**73**	**(100)**	**403**	**(100)**

10.4 Characteristics of Visits of International Wine Tourists to the Auckland Wine Region

From Table 10.7, of international visitors (n = 70), the different modes of transport used during their stay in Auckland averaged 4.5 for each wine tourist. Walking was by far the most popular mode (21%), followed by public bus (16%), private car (14%) and tour bus (12%). For travelling to wineries the choice of transport mode varied depending upon winery location, with public bus (20%) being used especially to the two wine regions in West Auckland, ferry (18%) to Waiheke Island and tour coaches (11%) for those on packaged tours.

Table 10.7 Modes of transport of international wine tourists while in the Auckland Wine Region

Auckland Wine Region (total transport modes used)	**Frequency (n=70)**	**Percentage**
Transport modes used during stay in Auckland (respondents rated multiple selection (1 - ?) according to the most common mode used during their stay in Auckland)		
Rental car	31	(10)
Private car	41	(14)
Train	18	(6)
Public bus	49	(16)
Tour bus	37	(12)
Ferry	25	(8)
Walking	65	(21)
Camper-van	22	(5)
Bicycle	12	(4)
Other	12	(4)
Total	**312**	**100**
Mean	**4.5**	
Transport mode used to visit winery		
Rental car	9	(12)
Private car	12	(17)
Train	3	(4)
Public bus	14	(20)
Tour bus	8	(11)
Ferry	13	(18)
Walking	4	(6)
Camper-van	2	(3)
Bicycle	4	(6)
Other	1	(3)
Total	**70**	**100**

From Table 10.8 the frequency distribution of the reason for coming to Auckland of international wine tourists (after redistributing stopover visitors on a New Zealand-wide holiday to the standardised categories), roughly parallels the frequency distribution of the International Visitors' Survey (IVS) (Tourism New Zealand, 2003). The median intended length of stay for international wine tourists in Auckland is 7.4 days (see Section J.1.0 of Appendix J) which compares to 8.8 days from the IVS with 84% intending to stay less than 4 weeks. Most international visitors (64%) have already spent

Table 10.8 International wine tourists - particulars of visit to the Auckland Wine Region

Auckland Wine Region	Frequency (n = 70)	Percentage
Reason to visit Auckland		
Visiting friends or relatives	18	(26)
Business	8	(11)
Holiday	20	(28)
Convention or conference	4	(5)
Stopover before New Zealand tour	14	(21)
Other	6	(9)
Total	**70**	**(100)**
Length of stay in Auckland		
< 24hrs	2	(3)
1-2 days	4	(5)
3-4 days	11	(16)
5-7 days	17	(24)
1-2 weeks	18	(26)
3-4 weeks	7	(10)
> 4 weeks	11	(16)
Total	**70**	**(100)**
Median	**7.4**	
Length of time in Auckland already		
< 24hrs	4	(5)
1-2 days	11	(16)
3-4 days	19	(26)
5-7 days	11	(17)
1-2 weeks	18	(25)
3-4 weeks	3	(5)
> 4 weeks	4	(6)
Total	**70**	**(100)**
Median	**4.4**	
Accommodation type staying in		
With family or friends	15	(23)
Superior hotel	19	(29)
Quality hotel	13	(19)
Budget hotel	3	(4)
Motel	11	(15)
Backpackers hostel	2	(2)
Home-stay	1	(1)
Camping ground	2	(2)
Own New Zealand residence	1	(1)
Other	3	(4)
Total	**70**	**(100)**
Preferred style of travel		
Package traveller	7	(10)
Tour group traveller	5	(7)
Semi independent traveller (SIT)	17	(24)
Free independent traveller (FIT)	41	(59)
Total	**70**	**(100)**

between 0 and 7 days in Auckland, with a median of 4.4 days (see Section J.1.1 of Appendix J) at the time of their visit.

The frequency distribution of accommodation types chosen by international wine tourists to Auckland differs greatly from that of the IVS (chi square = 76.381, df = 9, p < .0025). International wine tourists are more likely to be staying at a superior or high quality hotel (48%) compared to 16% for the IVS, while those with family and friends at 23% is less than the IVS (31%). At the other end of the quality scale, accommodation at backpacker hostels at 2% is far less than the IVS of 18%. With regard to style of travel, Auckland's international wine tourists exhibited almost the same frequency distribution as the IVS (Examples: FIT - survey = 59%, IVS = 56% and SIT - survey = 24%, IVS = 23%).

10.5 Level of Wine Knowledge and Extent of Past Wine Experience of Visitors to the Auckland Wine Region

Both high levels of wine knowledge and extensive past experience with wine have been shown in the literature to be valid predictors of wine tourism by individual consumers (Mitchell, in progress; Getz, 2000; Hill, 1998).

Table 10.9 Characteristics of wine tourists in the Auckland Wine Region - wine knowledge

Wine sub-region	Henderson/ Henderson Valley n=123		Kumeu /Huapai Waimauku n=101		Matakana/ Mahurangi n=65		South Auckland n=41		Waiheke Island n=73		Totals n=403	
Wine Knowledge	**Freq.**	**%**	**Freq.**	**%**	**Freq.**	**%**	**Freq.**	**%**	**Freq.**	**%**	**Freq.**	**%**
No knowledge at all	12	(9)	8	(8)	3	(4)	5	(13)	2	(3)	30	(7)
Slight knowledge	7	(6)	8	(8)	4	(6)	4	(10)	4	(5)	27	(6)
Moderate knowledge	43	(35)	40	(39)	21	(34)	13	(32)	23	(32)	140	(35)
Good knowledge	47	(39)	34	(34)	26	(41)	16	(39)	31	(43)	154	(39)
Very good knowledge	10	(8)	6	(6)	6	(8)	2	(4)	7	(9)	31	(8)
Superior knowledge	4	(3)	5	(5)	5	(7)	1	(2)	6	(8)	21	(5)
Total	**123**	**(100)**	**101**	**(100)**	**65**	**(100)**	**41**	**(100)**	**73**	**100**	**403**	**(100)**

Table 10.9 shows that across the Auckland Wine Region 74% of respondents

considered themselves to have either a "moderate knowledge" or a "good knowledge" of wine. This was fairly consistent across all sub-regions and roughly conforms to the results of studies in Augusta-Margaret River, Western Australia (Morris and King, 1997), Victoria, Australia (Maddern and Golledge, 1996), Australian Capital Territory (Macionis, 1996) and in New Zealand

Table 10.10 Characteristics of wine tourists in the Auckland Wine Region - past wine experience

Wine sub-region	Henderson/ Henderson Valley n=123		Kumeu /Huapai Waimauku n=101		Matakana/ Mahurangi n=65		South Auckland n=41		Waiheke Island n=73		Totals n=403	
Monthly Consumption	**Freq.**	**%**	**Freq.**	**%**	**Freq.**	**%**	**Freq.**	**%**	**Freq.**	**%**	**Freq.**	**%**
Normal monthly household consumption of wine												
> 24 bottles	9	(7)	8	(8)	8	(12)	2	(5)	9	(13)	36	(9)
19 - 24 bottles	12	(10)	11	(11)	9	(13)	4	(8)	11	(15)	47	(12)
13 - 18 bottles	18	(15)	17	(16)	11	(18)	5	(13)	16	(20)	67	(16)
10 - 12 bottles	27	(22)	23	(23)	14	(22)	8	(22)	17	(23)	89	(22)
7 - 9 bottles	31	(25)	23	(23)	12	(20)	11	(27)	13	(18)	90	(22)
4 - 6 bottles	14	(11)	12	(12)	7	(10)	6	(15)	5	(8)	44	(11)
1 - 3 bottles	11	(9)	7	(7)	4	(5)	4	(8)	2	(3)	28	(7)
0 bottles	1	(1)	0	(0)	0	(0)	1	(2)	0	(0)	2	(1)
Total	**123**	**(100)**	**101**	**(100)**	**65**	**(100)**	**41**	**(100)**	**73**	**(100)**	**403**	**(100)**
Normal monthly expenditure on wine ($NZ)												
> $ 250	14	(11)	12	(12)	10	(14)	3	(9)	12	(16)	51	(13)
$176 - $250	10	(10)	11	(11)	9	(13)	3	(9)	10	(14)	43	(11)
$126 - $175	15	(12)	10	(10)	8	(12)	5	(10)	9	(13)	47	(12)
$101 - $125	31	(24)	27	(26)	16	(25)	8	(20)	19	(26)	101	(25)
$76 - $100	28	(22)	23	(23)	15	(23)	9	(23)	16	(21)	91	(22)
$51 - $75	10	(8)	7	(7)	3	(5)	6	(11)	3	(4)	29	(7)
$26 - $50	8	(7)	5	(5)	2	(4)	4	(10)	2	(3)	21	(5)
$1 - $25	6	(5)	6	(6)	2	(4)	2	(6)	2	(3)	18	(4)
$0	1	(1)	0	(0)	0	(0)	1	(2)	0	(0)	2	(1)
Total	**123**	**(100)**	**101**	**(100)**	**65**	**(100)**	**41**	**(100)**	**73**	**(100)**	**403**	**(100)**
Normal place of purchase of wine												
Supermarket	43	(35)	32	(31)	17	(26)	17	(46)	16	(21)	125	(31)
Cellar Door	18	(14)	18	(18)	15	(21)	5	(12)	19	(26)	76	(19)
Bottle Store	4	(3)	6	(6)	1	(2)	3	(7)	1	(1)	15	(4)
Wine Shop/ Specialised retailer	27	(22)	26	(26)	17	(26)	8	(19)	20	(28)	98	(24)
Wine Club	12	(10)	8	(8)	8	(11)	2	(5)	8	(12)	38	(9)
Auction	5	(4)	2	(2)	2	(4)	1	(2)	4	(5)	14	(3)
Restaurant only	5	(4)	2	(2)	1	(2)	2	(3)	1	(1)	11	(3)
Mail Order or Internet	8	(7)	5	(5)	3	(6)	2	(4)	4	(6)	22	(6)
Other	1	(1)	2	(2)	1	(2)	1	(2)	0	(0)	4	(1)
Total	**123**	**(100)**	**101**	**(100)**	**65**	**(100)**	**41**	**(100)**	**73**	**(100)**	**403**	**(100)**

(Longo, 1999; Johnson, 1998) all of which recorded a basic/moderate wine knowledge level of between 80% to 90% of respondents.

With regard to the predictor of "past experience with wine" Table 10.10 shows that across the Auckland Wine Region 55% of wine tourist households normally purchase between 4 and 12 bottles per month spending on average between NZ$51 and NZ$125 in the process. Although New Zealand supermarkets currently account for 52% of national domestic wine sales (New Zealand Herald, 2003e) wine tourists in the Auckland Wine Region only purchase 31% of their wine from this source, with 24% being purchased from specialised wine shops, 19% direct from wineries and 9% from wine clubs. Beverland *et al.* (1998a, b) found that wine tourists in West Auckland purchased around 8 bottles of wine per month at an average cost of NZ$93.65 with purchases being made from retail outlets (69%), wineries (19%) and wine clubs (8%). However in Texas, Dodd (1995) found that wine tourists in Texas normally consumed only 3.55 bottles of wine per month at a cost of approximately US$30 with wine being purchased from grocery or liquor shops (69%), restaurants (22%), wineries (8%) and mail order (1.3%).

10.6 Motivations and Decision Making Processes of Visitors to the Auckland Wine Region

The literature has tended to classify motivators as either internal (push) or external (pull) (Mitchell *et al.*, 2000) (see Section 5.4.0 of Chapter 5). Table 10.11 lists the results of a survey question centred around a multi-choice array of possible motivators (both internal and external). Motivators were ranked according to response frequencies within each sub-region and across the Auckland Wine Region as a whole, with an average number of motivators being calculated for each sub-region and overall. Overall across the Auckland Wine Region respondents chose an average of 5.39 motivators each.

A number of studies have found that motivating factors vary considerably by both country and region (see Section 5.4.0 of Chapter 5). However in the majority of reported surveys, especially in Australasia the two most important motivating factors are the tasting and purchasing of wine (see Table 5.7 of Chapter 5). This present survey confirms these findings in all of the sub-regions in the Auckland Wine Region (see Table 10.11). Beyond these two main motivators, response rates for other factors vary across the various sub-regions as shown by the differing rankings for each sub-region. Motivating factors concerned with leisure and social interaction score highly, followed closely by factors involved with wine education. This approximates the rankings of other studies, although such studies tend to rate factors involving dining facilities higher than in this present study (South Australian Tourism Commission, 2001; Johnson, 1998; Maddern and Golledge, 1996; Macionis, 1996; Macionis, 1994).

Table 10.11 Motivations of wine tourists to visit wineries in the Auckland Wine Region

Wine sub-region	Henderson/ Henderson Valley n=123		Kumeu /Huapai Waimauku n=101		Matakana/ Mahurangi n=65		South Auckland n=41		Waiheke Island n=73		Totals n=403	
Motivation	**Freq.**	**Rk.**	**Freq.**	**Rk.**	**Freq.**	**Rk.**	**Freq.**	**Rk.**	**Freq.**	**Rk.**	**Freq.**	**Rk.**
Tasting wine	101	1.	95	1.	61	1.	35	1.	71	1.	363	1.
Purchasing wine	81	2.	73	2.	43	2.	21	2.	58	2.	276	2.
A day out	78	3.	61	4.	39	3. =	17	3.	55	5.	250	3.
Relaxation	44	5.	62	3.	36	6.	9	7.	57	3.	208	4.
Winery/vineyard tour	60	4.	43	6.	28	7.	12	5.	56	4.	199	5.
Learning about wine	43	6.	54	5.	39	3.=	15	4.	34	9.	185	6.
Meeting the wine-maker	34	7.	40	7.	37	5.	8	8.=	39	7.	158	7.
Socialising with friends/ family	23	8.	38	8.	24	8.	10	6.	42	6.	137	8.
Picnic/Barbecue	21	9.	32	9.	20	9.	6	10.	27	10.	106	9.
Purchasing souvenirs etc.	12	11.	20	11.	14	10. =	8	8.=	40	8.	94	10.
Visit winery restaurant/ cafe	16	10.	24	10.	14	10.=	5	11.	26	11.	85	11.
Rural setting	8	12.	16	12.	13	12.	3	12.	9	13.	49	12.
Entertainment/ other attractions	4	13.	12	13.	12	13.	2	13.	18	12.	48	13.
Other	2	14.	4	14.	6	14.	1	14.	5	14.	18	14.
Total	**527**		**574**		**386**		**152**		**537**		**2 176**	
Mean	**4.28**		**5.68**		**5.93**		**3.70**		**7.35**		**5.39**	

Many visitors call in at more than one winery while they are visiting a wine tourism destination. Table 10.12 shows that across the Auckland Wine Region wine tourists intend to visit an average of 2.8 wineries while they are in the region. This varies by sub-region with a high of 3.5 for Waiheke and only 1.8 in the South Auckland sub-region. Waiheke Island is distinctive in that within a comparatively short distance there are numerous winery/vineyard properties within close proximity to one another, as well as a comprehensive wine trail system throughout the whole of the sub-region. Maddern and Golledge (1996) found that with Victorian wineries that the average number of wineries visited per trip was 3.4 with 7% of wine tourists visiting 10 or more, 16% visiting more than 6 and inter-state wine tourists tending to visit a greater number than the average. Dodd (1995) found that visitors to Texas wineries each visited on average 3.25 wineries during their visit to wine regions in the State with 11% visiting more than five wineries and 14% visiting only one. In West Auckland, Beverland *et al.* (1998a, b) found that there was an intention to visit 3.

Table 10.12 Visitor intention to visit additional wineries in the Auckland Wine Region

Wine sub-region	Henderson/ Henderson Valley n=123		Kumeu /Huapai Waimauku n=101		Matakana/ Mahurangi n=65		South Auckland n=41		Waiheke Island n=73		Totals n=403	
Number	**Freq.**	**%**	**Freq.**	**%**	**Freq.**	**%**	**Freq.**	**%**	**Freq.**	**%**	**Freq.**	**%**
Number of wineries/vineyards intend to visit during this trip												
more than five	15	(12)	10	(10)	10	(16)	3	(6)	25	(34)	63	(16)
four	26	(21)	19	(19)	16	(25)	4	(7)	21	(30)	86	(21)
three	33	(27)	24	(23)	17	(26)	7	(17)	9	(11)	90	(23)
two	22	(18)	22	(22)	13	(20)	9	(24)	8	(10)	74	(18)
one	15	(12)	14	(14)	7	(10)	10	(27)	6	(9)	52	(13)
none	12	(10)	12	(12)	2	(3)	8	(19)	4	(6)	38	(9)
Total	**123**	**(100)**	**101**	**(100)**	**65**	**(100)**	**41**	**(100)**	**73**	**(100)**	**403**	**(100)**
Mean	**2.4**		**2.5**		**3.0**		**1.8**		**3.5**		**2.8**	

10.7 Information Sources Used by Visitors to the Auckland Wine Region

According to Getz (2000) the information sources used by wine tourists depend largely upon the time available between making a decision to visit a winery and the time of the actual visit. This time elapse enables prospective visitors to consult differing sources of information prior to their visit. An extreme example is a completely spontaneous visit by someone who happens to be passing through the region. In this case roadside signage is clearly significant in the decision making process. Table 10.13 shows that few decisions are in fact spontaneous (12%), with most winery visits involving some planning. Most decisions are made within two weeks of the actual visit (66%).

Dodd (1995) found that in the case of wineries in Texas that 46% of such decisions were made during the two week period prior to the visit and that 12% were in fact spontaneous. However the Victoria Wineries Tourism Council (1997) found that 23% of visits were spontaneous and that 52% were planned within two weeks of the visit. Table 10.14 lists the results of a survey question centred around a multi-choice array of possible information sources. On average across the Auckland Wine Region respondents utilised 3.1 differing sources of information concerning the particular winery they visited. Recommendations from friends and relatives ("word of mouth") was the most

Table 10.13 Time elapsed between making a decision to visit a winery/vineyard and the actual visit in the Auckland Wine Region

Wine sub-region	Henderson/ Henderson Valley n=123		Kumeu /Huapai Waimauku n=101		Matakana/ Mahurangi n=65		South Auckland n=41		Waiheke Island n=73		Totals n=403	
Time elapsed	**Freq.**	**%**	**Freq.**	**%**	**Freq.**	**%**	**Freq.**	**%**	**Freq.**	**%**	**Freq.**	**%**
Period of time between deciding to visit and the actual visit.												
less than 24 hours	20	(16)	12	(12)	3	(5)	8	(19)	4	(5)	47	(12)
between 1 and 3 days	24	(21)	24	(23)	8	(13)	7	(18)	8	(11)	71	(18)
between 4 and 7 days	23	(19)	21	(21)	11	(17)	8	(19)	11	(14)	74	(19)
between 1 and 2 weeks	16	(13)	15	(15)	14	(21)	7	(16)	17	(22)	69	(17)
between 2 and 3 weeks	15	(12)	11	(11)	12	(19)	5	(12)	15	(21)	58	(14)
between 3 and 4 weeks	11	(9)	10	(10)	6	(9)	3	(8)	7	(10)	37	(9)
between 1 and 3 months	9	(7)	5	(5)	5	(7)	2	(6)	4	(6)	25	(6)
between 4 and 6 months	3	(2)	3	(3)	3	(5)	1	(2)	4	(6)	14	(3)
more than 6 months	2	(1)	0	(0)	3	(4)	0	(0)	3	(5)	8	(2)
Total	**123**	**(100)**	**101**	**(100)**	**65**	**(100)**	**41**	**(100)**	**73**	**(100)**	**403**	**(100)**

Table 10.14 Sources of information used by wine tourists prior to visiting wineries in the Auckland Wine Region

Wine sub-region	Henderson/ Henderson Valley n=123		Kumeu /Huapai Waimauku n=101		Matakana/ Mahurangi n=65		South Auckland n=41		Waiheke Island n=73		Totals n=403	
Information Source	**Freq.**	**Rk.**	**Freq.**	**Rk.**	**Freq.**	**Rk.**	**Freq.**	**Rk.**	**Freq.**	**Rk.**	**Freq.**	**Rk.**
Word of mouth	87	1.	69	2.	39	1.	31	1.	60	1.	286	1.
Previous exposure to brand	65	2.	71	1.	32	2.	21	2.	55	2.	244	2.
Brochures	34	3.	22	5.	29	3.	17	3.	45	3.	147	3.
Previous visits to the winery	18	6.	43	3.	16	6.	11	5.	31	4.=	119	4.
Visitor Centres	20	5.	20	6.	14	7.	15	4.	31	4.=	100	5.
Signage	23	4.	28	4.	18	4.	8	6.	22	6.	99	6.
Newspapers Articles	13	7.	18	7.	17	5.	7	7.	21	7.	76	7.
Travel agencies	8	8.=	16	8.	7	8.	6	8.	19	8.	56	8.
Magazines Articles	8	8.=	10	9.	6	9.	5	9.	17	9.	46	9.
Internet	7	10.	9	10.	4	10.	4	10. =	6	10.	30	10.
Radio	4	12.	8	11.	2	12.	4	10.=	5	11.	23	11.
Television	5	11.	2	13.	3	11.	1	12.	3	12.	14	12.
Other	3	13.	7	12.	1	13.	0	13.	2	13.	13	13.
Total	**295**		**323**		**188**		**130**		**317**		**1 253**	
Mean	**2.39**		**3.19**		**2.89**		**3.17**		**4.34**		**3.10**	

common source of information and used by 71% of all respondents across the region. This was followed by "previous exposure to the brand" (61%), "brochures" (36%) and "previous visits to the winery" (29%). Other studies have found that although "word of mouth" is always the most important information source, "newspaper and magazine articles or advertising" is often rated as third following "previous exposure to the brand" as second (Victoria Wineries Tourism Council, 1997). Although the Internet was only ranked as tenth with a 7% usage in the survey, according to Getz (2000), its use by wine tourists is increasing dramatically as more and more wineries develop "attractive and user friendly web pages with useful links" (Getz, 2000, p. 220).

10.8 The Significance of Winery Attributes in the Decision to Purchase Wine at Wineries in the Auckland Wine Region

Dodd (1995) and Dodd and Bigotte (1997, 1995) introduced into the literature the notion of winery attributes, their effect on the purchasing behaviour of wine tourists and their differing importance to specific market segments (see Section 6.4 of Chapter 6).

Table 10.15 Winery attributes as ranked by wine tourism respondents in the Auckland Wine Region

Auckland Wine Region Attribute	Likert mean score (minimum = 1; maximum = 5)	Ranking Group	Ranking Overall
Wine Quality			
Overall quality	4.3	1.	1.
Wine quality	4.1	2.=	2. =
Wine taste	4.1	2.=	2.=
Wine price	3.5	4.	5.
Wine label	2.1	5.	14.=
Service Quality			
Overall service quality	3.6	1.	4.
Knowledge	3.0	2.	6.
Courteousness	2.8	3.	8.
Believable	2.6	4.	10.
Professionalism	2.2	5.	12.=
Friendliness	2.1	6.	14.=
Entertainment	1.5	7.	17.
Environment			
Overall Environment	2.9	1.	7.
Cleanliness	2.7	2.	9.
Pleasant	2.4	3.	11.
Attractive	2.2	4.	12.=
Display	1.9	5.	16.
Smells	1.4	6.	18.

Table 10.15 ranks the attributes, originally identified by Dodd (1995) into sub-groupings of wine quality, service quality and environment. Respondents were asked to score these using a five point Likert scale. The mean values of these scores were then calculated and ranked within each sub-group and overall. As well as individual attribute scores, an overall score for each sub-group was also calculated so that the three sub-groups could also be ranked amongst themselves. The overall rankings were (in descending order):

- wine quality;
- service quality and
- environment.

Attributes of "quality" of wine offered and its "taste" were ranked ahead of "price" followed by the service attribute of winery staff "knowledge". Of the environmental attributes "cleanliness" was rated highest. This ranking of attributes however differed between age groups with younger age groupings (less than 30 y.o.) giving a greater weighting to environmental attributes while older age groupings (more than 50 y.o.) being more concerned with service quality attributes. Dodd (1995) using a frequency distribution found that the attributes in order of importance to wine tourists in Texas were:

- appealing taste (95%);
- wine quality (91%);
- aroma (88%);
- cleanliness (87%);
- label (83%);
- courteousness (80%);
- friendliness (75%);
- knowledge (56%) and
- price (42%).

10.9 Purchases Made During Visits by Wine Tourists to the Auckland Wine Region

Earlier research has determined that a number of visitors to wineries do not in fact purchase any wine at all. Morris and King (1997) found in their Augusta-Margaret River study that 20% of visitors fell into this category. Table 10.16 shows that across the Auckland Wine Region, wine tourists who failed to purchase any wine were found to average 21% (with a high of 34% in South Auckland and a low of 9% in the Waiheke Island sub-region).

Table 10.16 Wine purchased during current visit to a winery in the Auckland Wine Region

Wine sub-region	Henderson/ Henderson Valley n=123		Kumeu /Huapai Waimauku n=101		Matakana/ Mahurangi n=65		South Auckland n=41		Waiheke Island n=73		Totals n=403	
Wine purchased this visit	Freq.	%	Freq.	%	Freq.	%	Freq.	%	Freq.	%	Freq.	%
Yes	94	(76)	75	(74)	56	(89)	27	(66)	66	(91)	318	(79)
No	29	(24)	26	(26)	9	(11)	14	(34)	7	(9)	85	(21)
Total	123	(100)	101	(100)	65	(100)	41	(100)	73	(100)	403	(100)

Table 10.17 shows that 80% of winery visitors across the Auckland Wine Region had purchased at least one bottle of the visited winery's brands during the past twelve months, with the mean number of bottles purchased being 7.7 (see Section J.2.0 of Appendix J). The means across the sub-regions ranged from a low of 6.4 bottles on Waiheke Island to a high of 8.7 bottles in Kumeu/Huapai/Waimauku for historic purchases over the 12 month period prior to the visit. This result contrasts sharply with Dodd (1995) who found that only 39% of winery visitors in Texas had purchased the brand(s) previously of the winery they were visiting.

From Table 10.17 the mean purchase of bottles of wine across the Auckland Wine Region by wine tourists (n = 318) (excluding those who did not purchase any wine) at the time of their visit to a winery was 5.2 bottles (see Section J.2.1 of Appendix J). Of the sub-regions, South Auckland had the highest mean at 6.9 bottles purchased during the visit and Matakana/Mahurangi the lowest at 4.9 bottles purchased.

Table 10.17 Historic and current wine purchases from the winery visited by wine tourists to the Auckland Wine Region

Wine sub-region	Henderson/ Henderson Valley		Kumeu /Huapai Waimauku		Matakana/ Mahurangi		South Auckland		Waiheke Island		Totals	
Number of bottles/	n= 94		n=75		n= 56		n=27		n=66		n=318	
Expenditure on wine	Freq.	%	Freq.	%	Freq.	%	Freq.	%	Freq.	%	Freq.	%
Bottles purchased of the visited winery's brands during the previous 12 months.												
more than 24 bottles	7	(7)	6	(8)	3	(5)	2	(7)	3	(4)	21	(6)
between 20 and 24 bottles	4	(4)	5	(6)	1	(1)	1	(3)	3	(4)	14	(4)
between 15 and 19 bottles	8	(8)	5	(6)	3	(5)	2	(7)	2	(3)	20	(6)
between 10 and 14 bottles	10	(11)	10	(14)	6	(10)	3	(9)	5	(8)	34	(11)
between 5 and 9 bottles	30	(32)	22	(30)	20	(37)	9	(34)	23	(35)	104	(33)
between 1 and 4 bottles	22	(23)	16	(21)	8	(15)	6	(23)	11	(18)	63	(20)
0 bottles	13	(15)	11	(15)	15	(27)	4	(17)	19	(28)	62	(20)
Total	**94**	**(100)**	**75**	**(100)**	**56**	**(100)**	**27**	**(100)**	**66**	**(100)**	**318**	**(100)**
Mean	**8.3**		**8.7**		**6.7**		**8.1**		**6.4**		**7.7**	
Number of bottles purchased during this visit.												
more than 24 bottles	1	(1)	2	(2)	0	(0)	1	(2)	1	(1)	5	(2)
between 19 and 24 bottles	3	(3)	1	(1)	1	(1)	1	(2)	1	(1)	7	(3)
between 13 and 18 bottles	4	(4)	3	(4)	4	(7)	2	(5)	4	(6)	17	(5)
between 10 and 12 bottles	6	(6)	5	(7)	3	(5)	3	(10)	3	(4)	20	(6)
between 7 and 9 bottles	7	(8)	6	(9)	3	(5)	3	(10)	3	(4)	22	(7)
between 4 and 6 bottles	18	(19)	13	(17)	15	(29)	5	(21)	20	(31)	71	(22)
between 1 and 3 bottles	55	(59)	45	(60)	30	(53)	12	(50)	34	(53)	176	(55)
Total	**94**	**(100)**	**75**	**(100)**	**56**	**(100)**	**27**	**(100)**	**66**	**(100)**	**318**	**(100)**
Mean	**5.1**		**5.0**		**4.9**		**6.9**		**5.1**		**5.2**	
Amount spent on wine purchases during this visit in $NZ.												
more than $250	1	(1)	2	(2)	0	(0)	1	(2)	1	(1)	5	(2)
between $ 176 and $250	2	(2)	1	(1)	2	(3)	0	(0)	2	(2)	7	(3)
between $126 and $175	2	(2)	3	(3)	3	(5)	2	(6)	3	(4)	13	(4)
between $101 and $125	6	(6)	5	(6)	4	(7)	2	(6)	4	(6)	21	(7)
between $76 and $100	7	(7)	6	(8)	3	(5)	3	(9)	4	(6)	23	(8)
between $51 and $75	14	(15)	10	(14)	9	(17)	4	(14)	10	(15)	47	(14)
between $26 and $50	19	(21)	16	(23)	18	(32)	5	(23)	23	(37)	81	(24)
between $1 and $25	43	(46)	32	(43)	17	(31)	10	(40)	19	(29)	121	(38)
Total	**94**	**(100)**	**75**	**(100)**	**56**	**(100)**	**27**	**(100)**	**66**	**(100)**	**318**	**(100)**
Mean	**$46.67**		**$51.66**		**$54.27**		**$59.29**		**$55.30**		**$52.05**	
Average price per bottle	**$9.15**		**$10.32**		**$11.07**		**$8.59**		**$10.84**		**$10.00**	

Table 10.17 also includes the mean expenditure for those wine tourists who purchased wine at wineries (n = 318). The mean expenditure per visitor across the Auckland Wine Region was NZ$52.05 (see Section J.2.3 of Appendix J). The sub-region with the highest mean expenditure for each wine tourist who purchased wine was South Auckland, with NZ$59.29 while the lowest was Henderson/Henderson Valley with NZ$46.67. The average price paid for each bottle of wine purchased across the region by winery visitors was NZ$10.00 with the highest average being paid in Matakana/Mahurangi at NZ$11.07 and

the lowest in South Auckland at NZ$8.59 (see Section J.2.2 of Appendix J). These results are greatly different to those of Beverland *et al.* (1998a, b) who found that wine tourists in West Auckland spent an average of NZ$126.90 on wine during each visit.

Dodd (1995) found that in Texas, winery visitors spent during each visit an average US$18.80 on wine purchases at an average price per bottle of US$8.79. Morris and King (1997) found that in the Augusta-Margaret River region that 22% of visitors spent nothing on wine, 28% spent less than AU$50, 19% spent between AU$ 51 and AU$ 100, 15% spent between AU$101 and AU$ 200 and that 16% spent in excess of AU$ 201.

Table 10.18 Intended purpose for wine purchased during the current visit to a winery in the Auckland Wine Region

Auckland Wine Region Intended purpose	Frequency (n = 318)	Percentage
consumption within:		
next week	69	(22)
next month	99	(31)
next year	44	(14)
wine cellar for storage of more than 1 year	38	(12)
as a gift	49	(15)
other	19	(6)
Total	**318**	**(100)**

Table 10.18 sets out the intended purpose for which the wine was purchased. Over half of the wine purchased was intended for consumption during the following month (53%) while 15% was purchased for a gift and only 12% for storage in a wine cellar for more than a year. In Dodd (1995), 48% of respondents to the study in Texas said that the wine was for consumption during the next week, 31% said it was for consumption at a later time and 21% said that it was for a gift.

Table 10.19 shows particulars of purchases of products and services other than wine, from wineries in the Auckland Wine Region. Of winery visitors (n = 403) across the region 58% did not in fact purchase any other products and services. This varied greatly by region. While only 42% of visitors to Waiheke declined to purchase any other products and services, 76% of South Auckland winery visitors did likewise. Across the Auckland Wine Region, arts and crafts were the most popular item (26%) followed by souvenirs (22%) closely followed by restaurant and cafe meals at 16%. The average amount spent on other products and services (including those who did not in fact purchase at all) (n = 403) was NZ$23.66, with the high at Waiheke of NZ$43.82 and the low in South Auckland at NZ$16.14 (see Section J.2.4 of Appendix J). If the non-purchasers are excluded (n = 170) the average sale value for the whole region increases to NZ$56.09, with the highest value still being Waiheke (NZ$76.16) and the lowest value changing to the sub-region of Kumeu/Huapai/ Waimauku (NZ$39.92) (see Section J.2.4 of Appendix J).

Table 10.19 Purchase of goods and services other than wine while visiting a winery in the Auckland Wine Region

Wine sub-region	Henderson/ Henderson Valley		Kumeu /Huapai Waimauku		Matakana/ Mahurangi		South Auckland		Waiheke Island		Totals	
Purchase of other goods and services	n=123		n=101		n=65		n=41		n=73		n=403	
	Freq.	%	Freq.	%	Freq.	%	Freq.	%	Freq.	%	Freq.	%
No purchase	81	(65)	60	(61)	30	(48)	31	(76)	31	(42)	233	(58)
Souvenirs	25	(20)	26	(26)	19	(29)	6	(14)	12	(16)	88	(22)
Restaurant/cafe meals	14	(11)	13	(13)	17	(26)	3	(8)	17	(23)	64	(16)
Arts and Crafts	18	(15)	23	(23)	16	(25)	12	(29)	36	(49)	105	(26)
Barbecue Meals	4	(3)	0	(0)	3	(4)	0	(0)	6	(8)	13	(3)
Other entertainment	2	(2)	0	(0)	2	(3)	0	(0)	4	(6)	8	(2)
Accommodation	0	(0)	2	(2)	1	(2)	0	(0)	2	(3)	5	(1)
Other	7	(4)	5	(5)	3	(4)	1	(2)	1	(2)	17	(4)
***more than one purchase**												
Total	**151**	**(120)***	**129**	**(130)***	**91**	**(141)***	**53**	**(129)***	**109**	**(149)***	**533**	**(132)***
Total spent on other goods and services during this visit in $NZ.												
more than $250	0	(0)	0	(0)	1	(1)	0	(0)	3	(4)	4	(1)
between $ 176 and $250	0	(0)	1	(1)	1	(1)	0	(0)	2	(3)	4	(1)
between $126 and $175	1	(1)	0	(0)	2	(3)	1	(2)	3	(4)	7	(2)
between $101 and $125	3	(2)	2	(2)	2	(3)	1	(2)	3	(4)	11	(3)
between $76 and $100	5	(4)	4	(4)	3	(6)	2	(5)	4	(5)	18	(5)
between $51 and $75	7	(6)	5	(5)	4	(8)	2	(5)	7	(10)	25	(6)
between $26 and $50	12	(10)	7	(7)	11	(15)	2	(5)	8	(11)	40	(10)
between $1 and $25	14	(12)	22	(22)	11	(15)	2	(5)	12	(15)	61	(14)
$0	81	(65)	60	(59)	30	(48)	31	(76)	31	(44)	233	(58)
Total	**123**	**(100)**	**101**	**(100)**	**65**	**(100)**	**41**	**(100)**	**73**	**(100)**	**403**	**(100)**
Mean for all visitors	**$16.15**		**$16.20**		**$31.55**		**$16.14**		**$43.82**		**$23.66**	
Mean for purchasing visitors	**$47.31**		**$39.92**		**$58.60**		**$66.20**		**$76.16**		**$56.09**	

King and Morris (1999) found that of visitors to wineries in Western Australia, 58% spent money at winery restaurants (average of up to AU$100), 29% spent on local produce (average of AU$17), 28% spent on arts and crafts (average of AU$35) and 15% spent on souvenirs (average of AU$8). Beverland *et al.* (1998a,

b) found that wine tourists spent on average NZ$31 in restaurants, NZ$50 on arts and crafts and NZ$33 on souvenirs.

10.10 Overall Satisfaction/Dissatisfaction of Wine Tourists To the Auckland Wine Region

Table 10.20 summarises the overall level of satisfaction/dissatisfaction of wine tourists visiting wineries in the Auckland Wine Region (n = 403). The frequencies in this table have been translated back to the original Likert scale and then scored (see Section J.3 of Appendix J). The sub-districts ranked in descending order (between maximum 5 and minimum 1) and compared with the whole of the region are:

- Waiheke 3.68
- Kumeu/Huapai/Waimauku 3.47
- Matakana/Mahurangi 3.44
- Auckland Wine Region Overall 3.35
- Henderson/Henderson Valley 3.17
- South Auckland 2.82

Table 10.20 Visitors' overall rating of visitation to a winery in the Auckland Wine Region

Wine sub-region	Henderson/ Henderson Valley n=123		Kumeu /Huapai Waimauku n=101		Matakana/ Mahurangi n=65		South Auckland n=41		Waiheke Island n=73		Totals n=403	
Overall rating of winery	**Freq.**	**%**	**Freq.**	**%**	**Freq.**	**%**	**Freq.**	**%**	**Freq.**	**%**	**Freq.**	**%**
Extremely unsatisfactory	15	(12)	7	(7)	5	(8)	7	(17)	3	(4)	37	(9)
Unsatisfactory	23	(19)	14	(14)	8	(12)	9	(23)	7	(10)	61	(15)
Neutral	28	(23)	26	(26)	18	(27)	12	(29)	18	(24)	102	(26)
Satisfactory	39	(31)	32	(31)	21	(33)	10	(24)	27	(37)	129	(32)
Most satisfactory	18	(15)	22	(22)	13	(20)	3	(7)	18	(25)	74	(18)
Total	**123**	**(100)**	**101**	**(100)**	**65**	**(100)**	**41**	**(100)**	**73**	**(100)**	**403**	**(100)**
Mean Score	**3.17**		**3.47**		**3.44**		**2.82**		**3.68**		**3.35**	

10.11 Summary

The wine tourism consumer survey was based on data collected on site from wine tourists at 51 wineries (participation rate of 77%) across the Auckland Wine Region. The minimum sample size for this supervised self-administered questionnaire had earlier been calculated at 358 and during the course of the survey, valid completed questionnaires were received from 403 respondents of the 569 visitors approached (participation rate of 77%). *Minitab Version 12.1* was used to statistically analyse the data. Because the Auckland Wine Region is divisible into five distinct sub-regions, results, as well as being presented for the overall region, were also shown by sub-region where appropriate. Results were presented as frequency tables, ranked tables and Likert scored tables. Statistical tests of central tendency and skewedness were used. When available, other studies both local and international were compared to these results.

Wine tourists in the Auckland Wine Region differed from the demographic characteristics of the population generally. They were marginally inclined to be female, middle-aged, mostly New Zealand residents, extremely well educated and from large urban areas with day-trippers from Auckland predominating. Wine tourists also differed from the population generally with regard to socio-economic characteristics, being mainly high income earners with managerial or professional occupations.

International wine tourists constituted 16% of all wine tourists and originated mainly from Australia, North America and the United Kingdom. During their stay in Auckland a median of 4.5 modes of transport were used and their method of transportation to the winery visited was very much dependent upon the sub-region it was located in. Their intended length of stay in Auckland had a median of 7.4 days. The time already spent in Auckland when their visit took place had a median of 4.4 days. Although the frequency distribution of accommodation type used by international wine tourists in Auckland was skewed considerably to the more luxurious end than that of respondents to the *International Visitors' Survey* (Tourism New Zealand, 2003), with regard to the "reason for visiting" and the "style" of travel it was almost parallel to that survey.

Wine tourists in the Auckland Wine Region were found to have a moderate to good knowledge of wine and they mostly purchased between 4 and 12 bottles per month expending between NZ$51 and NZ$125. They also tended to favour wine specialty stores and winery cellar doors for purchases of wine than that of the population at large. During their visit to the wine region, Auckland's wine tourists planned to visit 2.8 wineries and their major motivations were tasting and purchasing wine followed by various leisure and educational motivators.

Wine tourists to Auckland used on average 3.1 different sources of information prior to their visit. Visits are mostly planned within the two weeks prior to the actual visit. While the most widely used information source was "word of mouth" followed by "previous brand exposure" and "brochures", the use of the "Internet" as an information source was growing rapidly.

Winery attributes are important to visitors when deciding whether or not to purchase wine during the course of their visit. The most important grouping of attributes in this decision making process were those related to "wine quality" followed by "service quality" attributes and finally those related to the "environment". The attribute of wine "price", within the first grouping, was ranked fifth.

Of Auckland's wineries, 79% of visitors purchased an average of 5.2 bottles spending NZ$52.05. Of those purchasing at the winery, 80% had previously purchased wine produced by the winery now visited during the previous 12 months. Other goods and services were purchased, at the winery visited, by 58% of all wine tourists with an average amount spent of NZ$23.66. Arts and crafts, souvenirs and restaurant/cafe meals were the most common categories of other goods and services purchased.

Finally wine tourists visiting the Auckland Wine Region were scored on the basis of a 5 point Likert scale for their overall satisfaction/dissatisfaction. The mean score for the whole region was 3.35 ranging from a high in the Waiheke Island sub-region of 3.68, to a low in the South Auckland sub-region of 2.82.

Chapter eleven: Results of Producers' Survey

11.0 Introduction

The results of this chapter are relevant to the supply side of the wine tourism market model (see Figure 4.0 of Chapter 4). The related research questions originally formulated were:

- Do wineries wish to attract additional visitors? Can wineries attract greater levels of visitation by providing further facilities and by using market segmentation for promotional purposes?
- What levels of networking currently exists as between wineries (Example: wine trails) and as between the wine and tourism industry generally? How can these be enhanced in the future to further promote wine tourism?

(see Section 9.6 of Chapter 9)

Data collected during the course of the wine tourism producers' survey was analysed in order to provide answers to these research questions. As with the consumers' survey (see Section 10.0 of Chapter 10), survey results were tabulated and presented by sub-region as well as for the region as a whole.

Results were shown as frequency distributions in table form, ranked tables or Likert score tables. Statistical measures of central tendency were used as well as measures of skewedness and t tests for comparison of means of independent samples. Where appropriate, results obtained were compared and contrasted with other published studies, both from New Zealand and overseas. This survey contained a number of themes. These included demographic topics (Examples: location, year established, size in hectares, numbers of employees, tonnes of grapes crushed), viticultural information (Examples: grape varieties crushed, origin of grapes) advantages and disadvantages of wine tourism, sources used to provide information, wine tourism facilities available, winery attributes and their perceived importance, networks and the interrelationships between the two industries, the importance of wine sales to visitors both currently and in the future and responses to an all-embracing series of statements pertaining to wine tourism.

11.1 Administering the Survey Instrument

The survey was carried out between April 1 and June 30, 2003. Each of the wineries scheduled in Appendix D were mailed a questionnaire, designated "Questionnaire Two" (see Appendix H), and from the responses follow up interviews were arranged with those responding positively. Questionnaire Three was administered as an interviewer completed survey including elements of a structured interview.

Table 11.0 Response rate by wine sub-region

Auckland Wine sub-region	No. of Wineries Total	Participating	Insufficient facilities for visitors	Refused to participate	Response rate
Henderson /Henderson Valley	19	16	3	0	84%
Kumeu /Huapai /Waimauku	11	10	0	1	91%
Matakana/Mahurangi	10	8	1	1	80%
South Auckland	8	6	2	0	75%
Waiheke Island	18	11	6	1	61%
Totals	**66**	**51**	**12**	**3**	**77%**

Table 11.0 sets out the response rates for wineries. Of the sixty-six wineries in the Auckland Wine Region, twelve advised that they did not really participate in wine tourism, in that they rarely encouraged visitors, as they had only minimal facilities for tasting or cellar door sales. Only three with suitable facilities advised that they were not interested in participating. The data collected from this wine tourism producer survey were entered and analysed using the statistical program *Minitab Version 12.1* An analysis of the results follows.

11.2 General Information About Wineries in the Auckland Wine Region

Table 11.1 shows a distribution of the years that the vineyards/wineries in the Auckland Wine Region were established. The area first planted was Henderson/Henderson Valley, with the first vineyard, Pleasant Valley, being planted in 1895. The median year of vineyard establishment in this sub-region was 1935 and the areas planted gradually spread north-west to the Kumeu/Huapai/Waimauku region (median year 1959). Waiheke Island and Matakana/Mahurangi are sub-regions largely containing newer and smaller "boutique" vineyards. The Antipodean in Matakana/Mahurangi, founded in 1978, was the first vineyard in this sub-region (median 1985) and on Waiheke Island, Stonyridge (founded in 1982) had the first plantings (median 1992). South Auckland is mixed with Villa Maria having a long-established vineyard/winery property with extensive wine tourism facilities built more recently and Montana now retaining wine-making facilities only. Since the late 1980's a number of "boutique" wineries have been established in Clevedon, Karaka and Awhitu Peninsular (median 1993) (see Section K.0 of Appendix K).

Table 11.1 Length of time winery established

Wine sub-region	**Henderson/ Henderson Valley**		**Kumeu /Huapai Waimauku**		**Matakana/ Mahurangi**		**South Auckland**		**Waiheke Island**		**Totals**	
	n=16		**n=10**		**n=6**		**n=8**		**n=11**		**n=51**	
Time winery established	**Freq.**	**%**	**Freq.**	**%**	**Freq.**	**%**	**Freq.**	**%**	**Freq.**	**%**	**Freq.**	**%**
Before 1909	3	(19)	0	(0)	0	(0)	0	(0)	0	(0)	3	(6)
1910 to 1929	4	(25)	1	(10)	0	(0)	0	(0)	0	(0)	5	(11)
1930 to 1949	3	(19)	3	(30)	0	(0)	1	(12)	0	(0)	7	(14)
1950 to 1969	3	(19)	1	(10)	0	(0)	1	(12)	0	(0)	5	(11)
1970 to 1979	1	(6)	1	(10)	1	(16)	0	(0)	0	(0)	3	(6)
1980 to 1984	1	(6)	0	(0)	1	(17)	0	(0)	1	(9)	3	(6)
1985 to 1989	1	(6)	2	(20)	1	(16)	1	(13)	3	(27)	7	(14)
1990 to 1994	0	(0)	1	(10)	2	(34)	2	(25)	3	(27)	8	(16)
1995 to 1999	0	(0)	1	(10)	1	(17)	2	(25)	3	(27)	7	(14)
After 1999	0	(0)	0	(0)	0	(0)	1	(13)	1	(10)	1	(2)
Total	**16**	**(100)**	**10**	**(100)**	**6**	**(100)**	**8**	**(100)**	**11**	**(100)**	**51**	**(100)**
Median Year	**1935**		**1959**		**1985**		**1993**		**1992**		**1984**	

Table 11.2 sets out indicators of size. The vineyard area in hectares (ha) includes all land owned by the wineries in the Auckland Wine Region only. The grapes crushed, measured in tonnes, includes all grapes crushed at the winery within the sub-region, even though some of the grapes may have been grown in other wine regions on land owned by the company or by contract grape growers and trucked in. Where musts have been transported for winemaking purposes then the equivalent weight in tonnes of grapes prior to crushing is included. The mean vineyard area for the Auckland Wine Region is 11.2 ha while the median

is only 6.6 ha. The reason for the large disparity between mean and median is the existence in Auckland of five relatively large properties which distorts the value of the mean. Using the median as a fairer measure of central tendency Kumeu/Huapai/Waimauku, with a number of medium sized wine producers has the highest median of 15 ha and Waiheke Island with numerous boutique wineries the lowest, being of 3 ha only (see Section K.1.0 of Appendix K).

Table 11.2 Size indicators of wineries/vineyards

Wine sub-region	**Henderson/ Henderson Valley n=16**		**Kumeu /Huapai Waimauku n=10**		**Matakana/ Mahurangi n=6**		**South Auckland n=8**		**Waiheke Island n=11**		**Totals n=51**	
Size indicator	**Freq.**	**%**	**Freq.**	**%**	**Freq.**	**%**	**Freq.**	**%**	**Freq.**	**%**	**Freq.**	**%**
Land Area * includes planted areas not yet producing												
Less than 3 ha	3	(19)	1	(10)	2	(34)	2	(25)	5	(45)	13	(26)
Between 3 and 5 ha	3	(19)	1	(10)	1	(16)	2	(25)	3	(28)	10	(20)
Between 6 and 10 ha	4	(38)	1	(10)	1	(17)	1	(13)	2	(18)	9	(17)
Between 11 and 15 ha	3	(19)	2	(20)	1	(16)	0	(0)	1	(9)	7	(14)
Between 16 and 20 ha	2	(5)	2	(10)	1	(17)	2	(12)	0	(0)	7	(7)
Between 21 and 50 ha	1	(0)	3	(20)	0	(0)	0	(0)	0	(0)	4	(4)
Between 51 and 100 ha	0	(0)	0	(0)	0	(0)	1	()	0	(0)	1	(2)
More than 100 ha	0	(0)	0	(0)	0	(0)	0	(0)	0	(0)	0	(0)
Total	**16**	**(100)**	**10**	**(100)**	**6**	**(100)**	**8**	**(100)**	**11**	**(100)**	**51**	**(100)**
Mean	**10 ha**		**18.1 ha**		**7.8 ha**		**16.3 ha**		**4.6 ha**		**11.2 ha**	
Median	**7.5 ha**		**15 ha**		**5 ha**		**5 ha**		**3 ha**		**6.6 ha**	
Grapes crushed												
Less than 30 tonnes	3	(19)	1	(10)	4	(67)	3	(37)	7	(64)	18	(35)
Between 31 and 50 tonnes	2	(13)	0	(0)	2	(33)	1	(12)	2	(18)	7	(14)
Between 51 and 100 tonnes	3	(19)	1	(10)	0	(0)	1	(13)	1	(9)	6	(12)
Between 101 and 150 tonnes	3	(19)	2	(20)	0	(0)	0	(0)	1	(9)	6	(12)
Between 151 and 200 tonnes	1	(6)	1	(10)	0	(0)	1	(13)	0	(0)	3	(6)
Between 201 and 500 tonnes	1	(6)	1	(10)	0	(0)	0	(0)	0	(0)	2	(4)
Between 501 and 1000 tonnes	1	(6)	2	(20)	0	(0)	0	(0)	0	(0)	3	(5)
More than 1001 tonnes	2	(12)	2	(20)	0	(0)	2	(25)	0	(0)	6	(12)
Total	**16**	**(100)**	**10**	**(100)**	**6**	**(100)**	**8**	**(100)**	**11**	**(100)**	**51**	**(100)**
Mean (tonnes)	**250**		**437**		**23**		**291**		**35**		**220**	
Median (tonnes)	**83**		**175**		**22**		**40**		**25**		**58**	

With reference to tonnes of grapes crushed (or musts measured in grape equivalents), again the mean is distorted, because of grapes and musts transported into the region, not only by the very large wineries (Examples: Montana, Villa Maria, Nobilo) but also by some of the medium sized producers (Examples: Matua Valley, Collards, Delegats) who in order to expand their product range often source grapes and musts from other growing regions. The median for the whole region is 58 tonnes with Kumeu/Huapai/Waimauku having the highest median crush of 175 tonnes and Matakana/Mahurangi the lowest of 22 tonnes (see Section K.1.1 of Appendix K).

Table 11.3 Employee numbers at wineries/vineyards

Wine sub-region	Henderson/ Henderson Valley n=16		Kumeu /Huapai Waimauku n=10		Matakana/ Mahurangi n=6		South Auckland n=8		Waiheke Island n=11		Totals n=51	
Size indicator	**Freq.**	**%**	**Freq.**	**%**	**Freq.**	**%**	**Freq.**	**%**	**Freq.**	**%**	**Freq.**	**%**
Full-time employees												
Less than 3 employees	4	(25)	3	(30)	4	(67)	4	(50)	6	(54)	21	(41)
Between 3 and 5 employees	3	(19)	2	(20)	2	(33)	2	(25)	3	(27)	12	(23)
Between 6 and 7 employees	2	(13)	0	(0)	0	(0)	0	(0)	1	(9)	3	(6)
Between 8 and 10 employees	3	(19)	1	(10)	0	(0)	0	(0)	1	(9)	5	(10)
Between 11 and 15 employees	1	(6)	0	(0)	0	(0)	0	(0)	0	(0)	1	(2)
Between 16 and 20 employees	1	(6)	1	(10)	0	(0)	0	(0)	0	(0)	2	(4)
Between 21 and 30 employees	0	(0)	1	(10)	0	(0)	0	(0)	0	(0)	1	(2)
More than 30 employees	2	(12)	2	(20)	0	(0)	2	(25)	0	(0)	6	(12)
Total	**16**	**(100)**	**10**	**(100)**	**6**	**(100)**	**8**	**(100)**	**11**	**(100)**	**51**	**(100)**
Mean	**9.4**		**12.6**		**2.6**		**9.5**		**3.6**		**8.0**	
Median	**6.5**		**5.0**		**2.3**		**1.5**		**3.0**		**4.3**	
Part-time employees												
None	7	(44)	5	(50)	4	(67)	3	(37)	7	(64)	26	(52)
Less than 3 employees	2	(13)	1	(10)	1	(16)	1	(12)	3	(27)	8	(16)
Between 3 and 5 employees	1	(6)	1	(10)	1	(17)	1	(13)	1	(9)	5	(10)
Between 6 and 7 employees	2	(13)	1	(10)	0	(0)	1	(12)	0	(0)	4	(7)
Between 8 and 10 employees	0	(0)	0	(0)	0	(0)	0	(0)	0	(0)	0	(0)
Between 11 and 15 employees	1	(6)	0	(0)	0	(0)	0	(0)	0	(0)	1	(2)
Between 16 and 20 employees	2	(12)	0	(0)	0	(0)	0	(0)	0	(0)	2	(4)
Between 21 and 30 employees	0	(0)	0	(0)	0	(0)	1	(13)	0	(0)	1	(2)
More than 30 employees	1	(6)	2	(20)	0	(0)	1	(13)	0	(0)	4	(7)
Total	**16**	**(100)**	**10**	**(100)**	**6**	**(100)**	**8**	**(100)**	**11**	**(100)**	**51**	**(100)**
Mean	**6.3**		**7.3**		**1.0**		**8.4**		**0.9**		**5.0**	
Median	**1.5**		**0.0**		**0.0**		**1.5**		**0.0**		**0.0**	

Table 11.3 shows the staffing levels both full-time and part-time for wineries in the Auckland Wine Region. These include all family members of owners/proprietors. For full-time employees, the mean across the whole of the region was 8.0 and the median 4.3. In the sub-regions where boutique wineries predominate, such as Waiheke Island (mean 3.6) and Matakana/Mahurangi (mean 2.6), many wineries operate with family members only. In the sub-regions with larger wineries, such as Kumeu/Huapai/Waimauku (mean 12.6), Henderson/Henderson Valley (mean 9.4) and South Auckland (mean 9.5), the means reflect the influence of the larger operators in spite of the existence of

smaller wineries as well (see Section K.1.1 of Appendix K). The pattern with part-time workers is similar, with most being employed by the larger operators (see Section K.1.2 of Appendix K).

11.3 Viticultural Information About Wineries in The Auckland Wine Region

For *Vitis vinifera* the Auckland climate is more suitable to produce grapes for the production of Bordeaux styled wines (Cabernet Sauvignon, Merlot and Cabernet Franc). These grape varieties require a longer summer ripening period. More recently during the 1980's and 1990's, however, Chardonnay plantings were widely made throughout the region. Table 11.4 shows the rankings of grape varieties used for wine produced in the Auckland Wine Region.

Table 11.4 Wine produced by grape variety in the Auckland Wine Region

Grape Variety	Auckland Wine Region %	Rank
Chardonnay	23%	1
Merlot	21%	2
Cabernet Sauvignon	16%	3
Cabernet Franc	7%	4
Pinotage	5%	5=
Pinot Noir	5%	5=
Sauvignon Blanc	5%	5=
Pinot Gris	3%	8=
Syrah/Shiraz	3%	8=
Müller-Thurgau	2%	10=
Semillon	2%	10=
Palomino	2%	10=
Chenin Blanc	1%	13=
Gewurztraminer	1%	13=
Malbec	1%	13=
Muscat Varieties	1%	13=
Riesling	1%	13=
Others	1%	13=

As earlier noted, both grapes and musts are also brought into the Auckland Wine Region mainly from Hawkes Bay (24%), Gisborne (21%) and to a lesser extent from Marlborough (19%) (see Table 11.5), although the larger wine producers now have processing plants in most of the major grape-growing areas as well as in Auckland. The Auckland Wine Region grows less than 2% of the country's grapes but its wineries produce 12.4% of the nation's wine (see Table A.11 of Appendix A). Table 11.5 shows the geographic origin of the grapes and musts used in the Auckland Wine Region for wine production. Only 18% of the grapes (or musts) used in the Auckland Wine Region are actually grown there. As well as the extremely large wine producers (Examples: Montana, Villa Maria and Nobilo) many of medium size also derive some of their grapes or musts from outside the region (Examples: Matua Valley, Collards and Delegats) although some such as Kumeu River promote themselves as using locally grown grapes only (Brajkovich, personal communication).

Table 11.5 Geographic origin of grapes crushed in (or equivalent musts transported to) the Auckland Wine Region

	Auckland Wine Region	
Originating Region	**Percentage**	**Rank**
Hawke's Bay	24%	1
Gisborne	21%	2
Marlborough	19%	3
Auckland	18%	4
Nelson	7%	5
Canterbury	4%	6
Wairarapa	2%	7
Northland	1%	8=
Waikato	1%	8=
Bay of Plenty	1%	8=
Central Otago	1%	8=
Other	1%	8=

11.4 Advantages and Disadvantages of Wine Tourism as Perceived by Wineries in the Auckland Wine Region

The original research of Spawton (1986), Folwell and Grassel (1989) and Grassel (1994) was consolidated by Dodd (1995) who summarised the advantages and disadvantages of developing wine tourism in a wine region. This was both validated and extended by later researchers (Aplin, 1999; King and Morris, 1999; Bigsby *et al.*, 1998; Ali-Knight and Charters, 1998a, b; Dodd and Bigotte, 1997; Saunders, 1996; Reilly, 1996; Choisy, 1996; Dodd and Bigotte, 1995) (see Section 6.2 of Chapter 6). The results from Table 11.6 largely confirms this past research. Respondents were asked to rank the advantages and disadvantages of wine tourism. These rankings were then scored by attaching inverse scores to the rankings (Example: a rank of 2 out of 12 items scored 11). The table shows the score rankings by sub-region and overall for the whole region. The advantages of "an additional sales outlet" and "increased margins on direct sales" were ranked first and second respectively in each sub-region and overall for the whole region. Below this level the rankings vary by sub-region with

Table 11.6 Advantages and disadvantages of wine tourism as perceived by wineries in the Auckland Wine Region

Wine sub-region	Henderson/ Henderson Valley n=16	Kumeu /Huapai Waimauku n=10	Matakana/ Mahurangi n=6	South Auckland n=8	Waiheke Island n=11	Totals n=51
Advantages	**Rank**	**Rank**	**Rank**	**Rank**	**Rank**	**Rank**
An additional sales outlet	1.	1.	1.	1.	1.	1.
Increased margins on direct sales	2.	2.	2.	2.	2.	2.
Building brand loyalty resulting in overall sales increases	3.	4.	3. =	3.	5.	3.
Enhancing brand image	5.	3.	6.	7.	3.	4.
Enhancing vineyard/ winery image	4.	6.	7.	5.	4.	5.
Marketing intelligence - on new products	6.	5.	3.=	4.	9.	6.
Educational opportunities to promote wine generally	7.	7.	5.	8.=	7.	7.
Marketing intelligence on customers for database use	8.	8.	8.	6.	6.	8.
Build relationships with customers	9.	9.	9.	10.	10.	9.
Advertising using branded accessories	11.	11.	10. =	8.=	8.	10.
Develop economic base of the wine region generally	10.	10.	10.=	11.	11.	11.
Other	12.	12.	12.	12.	12.	12.
Disadvantages						
Extra operating costs	1.	1.	2.	1.	2.	1.
Extra time involved	3.	2.	1.	3.	1.	2.
Additional capital involved	2.	3.	3.	2.	3.	3.
Opportunity costs	4.	4.	4.	5.	4.	4.
Location constrains sales	6.	5.	5.	4.	5.	5.
Other	5.	6.	6.	6.	6.	6.

advantages related to image building (brand or winery) and marketing intelligence (products or customers) generally ranking ahead of educational opportunities, relationship marketing and economic benefits for the whole region.

Additional operating costs, time costs and capital costs were perceived as being the main disadvantages, both overall and in each of the sub-regions, ahead of the more obtuse opportunity costs and the limitations of geographic location.

11.5 Marketing Initiatives Used by Wineries in the Auckland Wine Region

As part of their marketing initiatives wineries provide various sources of information to potential wine tourists concerning the facilities that they have available. Table 11.7 lists the results of a survey question centred around a multi-choice array of possible information sources used by wineries to encourage visitation. The mean of information sources provided was 3.8 overall across the region, with all respondents using signage. In Waiheke and Matakana/Mahurangi which are the sub-regions particularly oriented towards

Table 11.7 Sources of information provided by wineries in the Auckland Wine Region

Wine sub-region	Henderson/ Henderson Valley n=16		Kumeu /Huapai Waimauku n=10		Matakana/ Mahurangi n=6		South Auckland n=8		Waiheke Island n=11		Totals n=51	
Information Source	**Freq.**	**Rk.**	**Freq.**	**Rk.**	**Freq.**	**Rk.**	**Freq.**	**Rk.**	**Freq.**	**Rk.**	**Freq.**	**Rk.**
Signage	16	1.	10	1.	6	1.	8	1.	11	1.	51	1.
Brochures	9	2.	6	2.	5	2.=	6	2.	10	2.=	36	2.
Member wine trail group	5	3.	5	3.=	5	2.=	0	11.	10	2.=	25	3.
Newspaper Articles/ Advertising	4	4.	5	3.=	1	8.	2	4.=	6	4.=	18	4.
Internet	3	5.	5	3.=	2	5.=	2	4.=	3	7.=	15	5.
Travel agencies	2	7. =	1	8.=	2	5.=	3	3.	6	4.=	14	6.
Visitor Centres	2	7. =	2	7.	3	4.	2	4.=	4	6.	13	7.
Magazines Articles/ Advertising	2	6.	3	6.	2	5.=	2	4.=	3	7.=	12	8.
Radio	1	9. =	1	8.=	0	9.=	2	4.=	2	9.	6	9.
Other	1	9.=	1	8.=	0	9.=	2	4.=	1	10.	5	10.
Television	0	11.	0	11.	0	9.=	1	10.	0	11.	1	11.
Total	**45**		**39**		**26**		**30**		**56**		**196**	
Mean	**3.7**		**3.9**		**4.3**		**3.8**		**5.1**		**3.8**	

wine tourism, the means are larger at 5.1 and 4.3, due mainly to the existence of extensive wine trail groups and a greater use of brochures and visitor centres. Although the Internet was only ranked as fifth, with only 29% of wineries providing web pages, according to Getz (2000), its use is increasing dramatically as more and more wineries develop suitable web sites.

11.6 Wine Tourism Facilities Available for Visitors to Wineries in the Auckland Wine Region

Wine tourism facilities, provided by wineries, have increased considerably throughout the Auckland Wine Region in the last few years (see Section 6.3 of Chapter 6 and Table A.33 and A.34 of Appendix A). Table 11.8 ranks wine tourism facilities available, in order of occurrence, overall across the region and by sub-region. Cellar door facilities, involving tasting and wine sales were available in all but one of the wineries surveyed. Across the region these were

Table 11.8 Wine tourism facilities available for visitors to wineries in the Auckland Wine Region

Wine sub-region	Henderson/ Henderson Valley n=16		Kumeu /Huapai Waimauku n=10		Matakana/ Mahurangi n=6		South Auckland n=8		Waiheke Island n=11		Totals n=51	
Facilities Available	**Freq.**	**Rk.**	**Freq.**	**Rk.**	**Freq.**	**Rk.**	**Freq.**	**Rk.**	**Freq.**	**Rk.**	**Freq.**	**Rk.**
*Cellar door (opened during normal trading hours)	8	1.	6	1.	3	1.	5	1.	7	1.	29	1.
*Cellar door (opened weekends or by arrangement)	7	1.	4	1.	3	1.	3	1.	4	1.	21	1.
Restaurant/cafe	7	2.	5	2.	3	2.=	5	2.	7	2.	27	2.
Tours offered of vineyard	4	3.	2	9.=	3	2.=	2	3.=	5	3.=	16	3.=
Picnic facilities	3	4.=	4	3.=	2	4.=	2	3.=	5	3.=	16	3.=
Tours offered of winery	3	4.=	3	6.=	2	4.=	2	3.=	5	3.=	15.	5.
Barbecue facilities	3	4.=	4	3.=	1	10.=	1	11.=	4	7.	13.	6.=
Arts and crafts sales	2	8.=	3	6.=	2	4.=	1	11.=	5	3.=	13.	6.=
Gift and souvenir sales	2	8.=	4	3.=	2	4.=	2	3.=	3	8.	13.	6.=
Children's playground	2	8.=	3	6.=	2	4.=	1	11.=	2	9.=	10	9.
Function facilities	3	4.=	1	12.=	1	10.=	2	3.=	2	9.=	9	10.
Conference facilities	2	8. =	2	9.=	1	10.=	2	3.=	1	13.=.	8	11.=
Disabled facilities	2	8. =	1	12.=	1	10.=	2	4.=	2	9.=	8	11.=
Accommodation	0	15.=	2	9.=	2	4.=	1	11.=	2	9.=	7	13.
Sports facilities	2	8.=	0	15.=	0	15.=	1	11.=	1	13.=	4	14.=
Other	0	15.=	1	12.=	1	10.=	1	11.=	1	13.=	4	14.=
Historic buildings/museum	1	14.	0	15.=	0	15.=	1	11.=	0	16.	2	16.
* Grouped as one item												
Total	**51**		**45**		**29**		**34**		**56**		**215**	
Mean	**3.2**		**4.3**		**4.8**		**4.0**		**5.3**		**4.2**	

available during normal business hours in 58% of wineries, with the remainder opened during weekends only or by appointment. Restaurants or cafes were the second-most available facility (52%) and other facilities such as tours, picnic and barbecue facilities were available in less than a third of wineries. Gifts, arts and souvenir shops were rarer still and existed in less than a quarter of wineries. Across the Auckland Wine Region, on-site accommodation was available at only seven wineries. The mean number of facilities provided across the region was 4.2 and it was noticeable that in those sub-regions where "boutique" wineries predominate and wine tourism assumes greater importance as a sales outlet, such as Waiheke Island (mean 5.3) and Matakana/Mahurangi (mean 4.8), the level of facility provision was greater.

Table 11.9 Tasting fees charged/not charged in the Auckland Wine Region

Wine sub-region	Henderson/ Henderson Valley n=16		Kumeu /Huapai Waimauku n=10		Matakana/ Mahurangi n=6		South Auckland n=8		Waiheke Island n=11		Totals n=51	
Tasting Fees	**Freq.**	**%**	**Freq.**	**%**	**Freq.**	**%**	**Freq.**	**%**	**Freq.**	**%**	**Freq.**	**%**
Varies	2	(13)	1	(10)	1	(16)	1	(13)	2	(18)	7	(14)
Yes	10	(62)	5	(50)	3	(50)	5	(62)	7	(64)	30	(59)
No	4	(25)	4	(40)	2	(34)	2	(25)	2	(18)	14	(27)
Total	**16**	**(100)**	**10**	**(100)**	**6**	**(100)**	**8**	**(100)**	**11**	**(100)**	**51**	**(100)**
NZ$'s Charged												
$2 or less	8	(67)	4	(67)	2	(50)	4	(67)	4	(45)	22	(59)
$2.01 to $4.00	2	(17)	1	(16)	1	(25)	2	(33)	3	(33)	9	(25)
$4.01 to $6.00	1	(8)	1	(17)	1	(25)	0	(0)	1	(11)	4	(11)
$6.01 to $8.00	1	(8)	0	(0)	0	(0)	0	(0)	1	(11)	2	(5)
$8.01 to $10	0	(0)	0	(0)	0	(0)	0	(0)	0	(0)	0	(0)
more than $10	0	(0)	0	(0)	0	(0)	0	(0)	0	(0)	0	(0)
Total	**12**	**(100)**	**6**	**(100)**	**4**	**(100)**	**6**	**(100)**	**9**	**(100)**	**37**	**(100)**
Mean	**$2.16**		**$2.00**		**$2.50**		**$1.66**		**$2.77**		**$2.24**	

Although commonly practiced overseas (Hall *et al.*, 2000b; Getz, 2000) the charging of tasting fees is still a controversial issue in New Zealand (Johnson, 1998; Beverland *et al.*, 1998a, b).

The charging of tasting fees is often used to recover the increased costs associated with wine tourism (Dodd, 1995; Dodd and Bigotte, 1995) as well as acting as a deterrent to rowdy and inappropriate behaviour by visitors (Travers, 1999; Johnson, 1998). Groups are more commonly charged tasting fees than individuals and some wineries have a variable policy, while others often credit fees previously charged against subsequent wine purchases (Beverland, 1998a, b; Macionis, 1998). From Table 11.9 throughout the Auckland Wine Region, tasting fees are never charged by 27% of wineries, while 59% always charge them and 14% adopt a variable policy as outlined. Across the region the average amount charged by wineries for tasting fees per head is NZ$2.24 (see Section K.2 of Appendix K) with the more tourist-oriented sub-regions such as Waiheke Island (mean NZ$2.77) and Matakana/Mahurangi (mean NZ$2.50) charging the highest fees. Beverland (1998a, b) found that in West Auckland that the average fee charged was $2.00 and that half of the wineries surveyed felt that tasting fees should never be charged except to groups. Travers (1999) commented that in Victoria's Yarra Valley that wineries commonly charged tasting fees of AU$2.00.

11.7 Winery Attributes as Perceived by Wineries in the Auckland Wine Region

Table 11.10 ranks the attributes, originally identified by Dodd (1995) into sub-groupings of wine quality, service quality and environment. The survey question asked of wine producers was identical to that asked of consumers (see Section 10.8 of Chapter 10). Respondents were requested to score these attributes using a five point Likert scale. The mean values of these scores were then calculated and ranked within each sub-group and overall.

Table 11.10 Winery attributes as ranked by winery respondents in the Auckland Wine Region

Auckland Wine Region Attribute	Likert mean score (minimum = 1; maximum = 5)	Ranking Group	Ranking Overall
Wine Quality			
Overall quality	4.6	1.	1.
Wine quality	4.0	2.	2.
Wine price	3.9	3.	3.=
Wine taste	3.6	4.	6.
Wine label	3.4	5.	7.
Service Quality			
Overall service quality	3.9	1.	3.=
Knowledge	3.0	2.	9.
Courteousness	2.9	3.	10.=
Friendliness	2.8	4.	12.
Entertainment	2.3	5.	15.
Professionalism	2.2	6.	16.=
Believable	2.1	7.	18.
Environment			
Overall Environment	3.7	1.	5.
Attractive	3.3	2.	8.
Display	2.9	3.	10.=
Pleasant	2.7	4.	13.
Cleanliness	2.5	5.	14.
Smells	2.2	6.	16.=

As well as individual attribute scores, an overall score for each sub-group was also calculated so that the three sub-groups could also be ranked amongst themselves. The overall rankings were identical to that of the consumer's survey (in descending order):

- wine quality;
- service quality and
- environment.

Using independent samples t test to highlight significant differences in comparative means it was determined that wineries considered the attributes of "label" , "display", "attractiveness", "price" , "friendliness" and the "overall environment" to be more important than consumers did. However consumers considered that the attributes of "believable", "cleanliness", "wine taste", "professionalism" and staff "knowledge" to be more important than did wineries.

11.8 Established Wine Industry and Tourism Industry Networks - Auckland Wine Region

The literature stresses the importance of developing interrelationships between members of both the wine and tourism industries in order to promote a wine region as a wine tourism destination (Blandy, 2000; Porter, 1990; Getz, 2000, 1999) and in particular to develop a "critical mass" of wineries within a region (Getz, 2000; Victorian Wineries Tourism Council, 1997). Interrelationships between participants in the two industries do not naturally occur and consequently a number of theorists have argued for the formation of regional organisations to fill this void (Hall *et al.*, 2000c; Getz, 2000; Hall *et al.*, 1998; Hall and Johnson, 1997; Macionis, 1997, 1996).

Table 11.11 shows the extent of formal interrelationships within the wine industry and between the wine and tourism industries. Within the wine industry the mean number of interrelationships is 2.01 across the whole region, with high values in Matakana/Mahurangi (2.66) and Waiheke Island (2.72), mainly because of participation in wine trails and wine (and food) festivals. As between the two industries the mean number of interrelationships across the whole region is 1.15 only, again with highs at Matakana/Mahurangi (mean 2.00) and Waiheke Island (mean 2.09).

Table 11.11 Network relationships of wineries in the Auckland Wine Region

Wine sub-region	Henderson/ Henderson Valley n=16		Kumeu /Huapai Waimauku n=10		Matakana/ Mahurangi n=6		South Auckland n=8		Waiheke Island n=11		Totals n=51	
Business relationships	**Freq.**	**Rk.**	**Freq.**	**Rk.**	**Freq.**	**Rk.**	**Freq.**	**Rk.**	**Freq.**	**Rk.**	**Freq.**	**Rk.**
Wine Industry												
Wine Institute NZ Inc. (aka NZ WineGrowers)	16	1.	10	1.	6	1.	8	1.	11	1.	51	1.
Wine (and food) festivals	5	2.	4	3.	5	2.=	2	3.=	10	2.	26	2.=
Wine trail group	6	3.	3	4.=	5	2.=	3	2.	9	3.	26	2.=
Tourism Industry												
Visitor information centre	3	4.	5	2.	4	3.=	2	3.=	7	5.	21	4.=
Tour companies (for winery tours)	4	5.	3	4.=	4	3.=	2	3.=	8	4.	21	4.=
Regional tourism orgs.	1	6.	2	6.	2	6.	0	6.=	5	6.	10	6.
New Zealand Way	1	7.	1	7.	2	7.	0	6.=	3	7.	7	7.
Total Wine Industry	**27**		**17**		**16**		**13**		**30**		**103**	
Total Tourism Industry	**9**		**11**		**12**		**4**		**23**		**59**	
Mean Wine Industry	**1.69**		**1.70**		**2.66**		**1.63**		**2.72**		**2.01**	
Mean Tourism Industry	**0.56**		**1.10**		**2.00**		**0.50**		**2.09**		**1.15**	

11.9 Current, Anticipated Wine Sales Made to Visitors by Wineries - Auckland Wine Region

From Table 11.12, across the Auckland Wine Region the mean percentage of sales made by wineries to wine tourists amounted to 26.56% of total sales, with a median of 21.60% (see Section K.3 of Appendix A). This varied from the highs of tourism oriented Matakana/Mahurangi (mean 39.58%, median 20.00%) and Waiheke Island (mean 36.13%, median 22.50%) to Kumeu/ Huapai/Waimauku (mean 16.25%, median 13.33%), where wineries are larger and tend to either export or use normal commercial distribution channels.

Folwell and Grassel (1989) found that of 32 wineries studied in Washington State that cellar door sales amounted to 22% of all wine sales. Hall and Johnson (1999) and Johnson (1998) noted in the results from the *New Zealand Winery Survey* that approximately 20% of winery turnover is from cellar door sales. The literature confirms the survey results - that for smaller wineries wine tourism is often the major source of sales revenue while for larger wineries its importance lies more in future brand recognition (see Section 6.2 of Chapter 6) (Getz, 2000; Getz, 1999; Aplin, 1999; King and Morris, 1999; Dodd and Bigotte, 1997; Fuller 1997; Choisy, 1996; Dodd, 1995; Folwell and Grassel, 1989).

Table 11.12 Current wine sales made to winery visitors in the Auckland Wine Region

Wine sub-region	Henderson/ Henderson Valley n=16		Kumeu /Huapai Waimauku n=10		Matakana/ Mahurangi n=6		South Auckland n=8		Waiheke Island n=11		Totals n=51	
Current wine sales	**Freq.**	**%**	**Freq.**	**%**	**Freq.**	**%**	**Freq.**	**%**	**Freq.**	**%**	**Freq.**	**%**
Less than 5%	1	(6)	2	(20)	0	(0)	2	(25)	0	(0)	5	(10)
Between 6% and 10%	1	(6)	1	(10)	0	(0)	0	(0)	0	(0)	2	(4)
Between 11% and 15%	3	(19)	3	(30)	1	(16)	1	(12)	0	(0)	8	(16)
Between 16% and 20%	5	(32)	1	(10)	1	(17)	1	(13)	2	(18)	10	(19)
Between 21% and 25%	1	(6)	1	(10)	1	(16)	2	(25)	3	(28)	8	(16)
Between 26% and 30%	2	(13)	1	(10)	0	(0)	0	(0)	2	(18)	5	(10)
Between 31% and 40%	1	(6)	0	(0)	0	(0)	0	(0)	1	(9)	2	(4)
Between 41% and 50%	1	(6)	1	(10)	1	(17)	0	(0)	1	(9)	4	(7)
Between 51% and 60%	0	(0)	0	(0)	0	(0)	1	(12)	0	(0)	1	(2)
Between 61% and 70%	1	(6)	0	(0)	1	(17)	1	(13)	0	(0)	3	(6)
Between 71% and 80%	0	(0)	0	(0)	1	(17)	0	(0)	1	(9)	2	(4)
Between 81% and 90%	0	(0)	0	(0)	0	(0)	0	(0)	1	(9)	1	(2)
Between 90% and 100%	0	(0)	0	(0)	0	(0)	0	(0)	0	(0)	0	(0)
Total	**16**	**(100)**	**10**	**(100)**	**6**	**(100)**	**8**	**(100)**	**11**	**(100)**	**51**	**(100)**
Mean	22.34%		16.25%		39.58%		25.00%		36.13%		26.56%	
Median	18.00%		13.33%		20.00%		20.00%		22.50%		21.60%	

With reference to future sales increases, Table 11.13 ranks the responses by sub-regions. Because of the predominance of boutique wineries across the Auckland Wine Region wine sales "directly to visitors" is ranked first. Only in the two sub-regions of Henderson/Henderson Valley and Kumeu/Huapai/ Waimauku, where a number of medium sized wineries operate, does future "export sales" rank ahead of future wine sales made "directly to visitors". Because the domestic market is largely regarded as mature, the category "domestic sales though normal distribution channels" generally ranks as third in anticipated revenue increases across the Auckland Wine Region.

Table 11.13 Anticipated increases in wine sales

Wine sub-region	Henderson/ Henderson Valley n=16		Kumeu /Huapai Waimauku n=10		Matakana/ Mahurangi n=6		South Auckland n=8		Waiheke Island n=11		Totals n=51	
Future wine sales	**Freq.**	**Rk.**	**Freq.**	**Rk.**	**Freq.**	**Rk.**	**Freq.**	**Rk.**	**Freq.**	**Rk.**	**Freq.**	**Rk.**
Directly to winery visitors	5	2.=	3	2.	4	1.	4	1.	5	1.	21	1.
Export sales	6	1.	6	1.	1	2.=	2	2.	2	3.	17	2.
Domestic sales though normal distribution channels	5	2.=	1	3.	1	2.=	1	3.=	3	2.	11	3.
Other	0	4.	0	4.	0	4.	1	3.=	1	4.	2	4.
Total	**16**		**10**		**6**		**8**		**11**		**51**	

11.10 Overall Assessment of Wine Tourism by Wineries in the Auckland Wine Region

Table 11.14 shows the results of a series of statements which were then scored on the basis of a five point Likert scale. The statements related entirely to the advantages and disadvantages of wine tourism as a business activity for a winery and were also intended to check the reliability of earlier responses in the questionnaire (see Section 12.7 of Chapter 12).

The first statement "visitors contribute greatly to my business" was ranked first overall (score of 4.0 out of a maximum of 5). By sub-region it ranked first or first equal across all sub-regions. The scores were noticeably larger on Waiheke Island (4.5) and Matakana/ Mahurangi (4.4) which are the two sub-regions concentrating more on wine tourism. In the case of Kumeu/Huapai/Waimauku (3.7) and Henderson/ Henderson Valley (4.0) the lower scores reflected the greater significance of wine exports and other normal domestic sales channels used.

The statement "allowing visitors tasting promotes future sales" had greater significance in Kumeu/Huapai/Waimauku (3.6) and Henderson/Henderson Valley (3.5) where the wineries are generally larger than on Waiheke Island (3.2) and Matakana/Mahurangi (3.2) where small wineries are more common. This statement scored 3.5 overall across the region. South Auckland was mixed with a score of 3.8 for each of the first two statements, reflecting the combination of extremely large and very small wineries that characterise that sub-region.

The statement "attending to visitors is very time consuming" again reflected the divide between the tourist oriented sub-regions and the sub-regions concentrating more on exporting and other domestic sales channels, with Kumeu/Huapai/Waimauku scoring 2.9 and Henderson/Henderson Valley scoring 2.8, while Waiheke Island scored 2.2 and Matakana/ Mahurangi scored 2.1. South Auckland was again in between these two distinct groupings and scored 2.6; the same as the region overall.

Exactly the same pattern emerged as between the sub-regions and overall across the region with the final two statements of "visitors taste wine but rarely buy" and "visitors demand tours but rarely buy".

Table 11.14 Overall assessment of wine tourism in the Auckland Wine Region

Auckland Wine Region	Likert mean score		(minimum = 1; maximum = 5)									
Wine sub-region	Henderson/ Henderson Valley		Kumeu /Huapai Waimauku		Matakana/ Mahurangi		South Auckland		Waiheke Island		Totals	
	n=16		n=10		n=6		n=8		n=11		n=51	
Assessment Statement	Score	Rk.	Score	Rk.	Score	Rk.	Score	Rk.	Score	Rk.	Score	Rk.
1. Visitors contribute greatly to my business.	4.0	1.	3.7	1.	4.4	1.	3.8	1.=	4.5	1.	4.0	1.
2. Allowing visitors tasting promotes future sales.	3.5	2.	3.6	2	3.2.	2.	3.8	1.=	3.2	2.	3.5	2.
3. Attending to visitors is very time consuming.	2.8	3.	2.9	3.	2.1	3.	2.6	3.	2.2	3.	2.6	3.
4. Visitors taste wine but rarely buy.	1.9	4.	1.7	5.	1.3	5.	1.6	4.	1.2	4.=	1.6	4.
5. Visitors demand tours but rarely buy.	1.6	5.	1.6	4.	1.3	4.	1.4	5.	1.3	4.=	1.6	5.

11.11 Summary

The producers' survey took the form of a structured interview with a final response rate of 77% . Data was statistically analysed by sub-region and presented in a series of frequency tables, ranked tables and Likert score tables. Where appropriate results were compared and contrasted with similar studies of local and international origin.

The general characteristics of wineries across the region was considered including location by sub-region and year of establishment. Size indicators such as land area, tonnes of grapes crushed and numbers of employees were also reviewed and it was determined that wineries in the sub-regions of Henderson/Henderson Valley and Kumeu/Huapai/Waimauku tended to be older, larger and oriented more towards wine sales through more traditional channels while in Matakana/Mahurangi and Waiheke Island wineries tended to be newer, smaller (or "boutique") and oriented more towards sales to visitors. The South Auckland sub-region was mixed with both extremely large as well as "boutique" wineries.

Viticultural information obtained in the survey found that wineries in the Auckland Wine Region had traditionally produced Bordeaux styled wines as the climate is generally favourable towards such grapes, but Chardonnay is now the most widely produced wine varietal across the region. A distinctive feature of the Auckland Wine Region is the inwards transportation of large quantities of grapes and musts from around the country, especially Hawke's Bay, Gisborne and Marlborough, for use in wine production based in Auckland.

The perception of the advantages of wine tourism varied by size of winery with smaller wineries tending to see it as an additional sales outlet at increased margins and larger wineries appreciating the image building that it offered for both brand and winery. When analysed by sub-region this largely reflected the type of wineries (small or large) constituting each particular sub-region. The operating and capital cost disadvantages of wine tourism tended to be down-played by the smaller wineries who were more concerned about time costs, when compared to the responses of those wineries that were larger. By sub-region, this again largely reflected the type of winery mainly constituting a particular sub-region.

Although more common in those sub-regions oriented towards wine tourism, wineries generally provided a number of information sources for potential visitors. Apart from signage, brochures and wine trail group membership were widely used for promotional purposes.

Throughout the Auckland Wine Region facilities appropriate for visitors has increased considerably in recent years. Of Auckland's 66 wineries 54 did in fact have suitable facilities. Of the 51 wineries finally surveyed cellar door facilities for tasting and buying were almost universal (50 wineries), with 58% open during normal business hours and the remainder at weekends or by appointment. Restaurants or cafes existed in a little over half of all the wineries surveyed, with tours, picnic, barbecue facilities available in slightly less than a third and arts, crafts, gifts and souvenirs sales available in around a quarter of respondents. On site accommodation facilities were comparatively rare. The tourism oriented sub-regions offered on average a greater number of wine tourism facilities per winery than the other sub-regions. The charging of tasting fees is now becoming more common especially in the tourism-oriented sub-regions.

As with the consumers' survey the most important grouping of attributes in this decision making process were those related to "wine quality" followed by "service quality" attributes and finally those related to the "environment". Within the attribute groupings however there were a number of noticeable differences when compared with the consumers' survey. An example was wine "price" this was perceived to be of significantly greater importance in the wine purchasing decision-making process by producers than it was by consumers.

Although networking between wine industry members is common-place, interrelationships are considerably rarer across industry lines. There are no formal wine-tourism organisations in the region.

Although wine sales to visitors is significant across all sub-regions, its importance is accentuated in the two sub-regions particularly oriented towards tourism. The prognosis for future growth in wine sales also divided in significance along these same sub-regional lines as did the final overall assessment of wine tourism, which was made in a series of summary statements, chiefly related to its advantages and disadvantages.

Chapter twelve - Discussion

12.0 Introduction

The wine tourism market model (see Figure 4.0 of Chapter 4) was used to explain the components of wine tourism and their interrelationships. This was the market-place model developed for and around which, this thesis is based.

Until recently, in spite of its acknowledged economic and social significance, there has been little methodical study of the development of wine tourism, the way in which it is managed and marketed and of the visitors to wine regions who come to experience the wine tourism product. These topics are not just of academic concern as they are substantial contributors to the sustained development of wine and the places and regions on which it is based. It is only more recently that the contribution of a broader more integrated understanding of the relevance of the social and cultural aspects of wine to its physical properties has become accepted as being of significance.

Answerable in terms of the components and their interrelationships of the conceptual wine tourism market model the research questions related to the Auckland Wine Region are (see Section 9.6 of Chapter 9):

- What are the characteristics of visitors to wineries ?
- What are the facilities and attributes of wineries considered by visitors to be the most important?
- Do wineries wish to attract additional visitors?
- Can wineries attract greater levels of visitation by providing further facilities and by using market segmentation for promotional purposes?
- What levels of networking currently exists as between wineries (Example: wine trails) and as between the wine and tourism industry generally?
- How can these be enhanced in the future to further promote wine tourism?

The research questions originally posed, are firstly answered and then discussed within each of the following sections. Questions of reliability and validity of the two surveys are also discussed.

12.1 What are the characteristics of visitors to wineries?

At the general demographic level, wine tourists in the Auckland Wine Region are slightly more likely to be female (52%); they tend to be in the age bracket of 31 to 50 years (58%); they tend to be extremely well educated (70%); they are mostly New Zealand Residents (84%), residing in large cities (79%); day-trippers from the Auckland Region predominate (76%) and of those who are of international origin, almost all are from the English speaking countries of Australia, United States, Canada and the United Kingdom, where wine consumption although not traditional, is now relatively well established (86%). Additionally the socio-economic characteristics of Auckland's wine tourists suggest that mostly they are engaged in professional or managerial occupations (68%) with personal annual incomes exceeding NZ$40,000 (66%) and NZ$65,000 (32%).

Two characteristics exhibited by most visitors to Auckland's wineries are their relatively high levels of both past experience with wine (average expenditure per month of NZ$112 for 10 bottles), and knowledge concerning wine (moderate to good). Visitors to the Auckland Wine Region tend to visit a number of wineries (2.8) during each visit and are each motivated by a number of different factors. Although the tasting (90%) and purchasing (68%) of wine are clearly primary motivators other factors concerned with leisure activities, socialising, education and dining are secondary considerations factored in by visitors prior to making their decision to visit a winery.

The characteristics of winery visitors, vary slightly by sub-region across the Auckland Wine Region, but more importantly they suggest that winery visitors tend to be "baby boomers", born between 1947 and 1963. This generation, middle aged, educated and relatively well-off is the primary target for wine tourism. Generation X, the following generation, born between 1964 and 1985, tend at present to be beer drinkers. Because of this it cannot be assumed that the present growth in wine tourism will always continue. The tendency towards wine "snobbery" and rising prices could well dissuade a generation, introduced to wine by cheap wine "coolers", away from the fine wine of the future. As illustrated by the characteristics of Auckland's wine tourists, wine tourism is a "niche" market only, and in the future if the market is to be expanded, ways must be found of attracting to wineries visitors beyond the present demographic limitations. However the "winescape" of wine tourism and the concept of "mass" tourism will always be irreconcilable. Consistent examples of promotion that may appeal to a younger generation are:

- the health benefits of moderate wine drinking which can be used to amplify a healthy life-style by emphasising moderation and
- organic viticulture and wine-making and the clean, green image of "wine country" can be used to stress the environmental benefits of wine tourism to a younger age group.

In Auckland there is a constant stream of international visitors using the city as a gateway for travel throughout the rest of the country. The survey shows that few wine tourists are in fact international visitors, and that in spite of the growing popularity of wine in Asian countries, as well as the increasing levels of visitor numbers from those sources (especially Japan, Taiwan and South Korea) that visits to wineries from tourists originating in those countries (1%) is comparatively rare. The number and variety of international visitor attractions in Auckland is somewhat restrictive and local wineries if carefully enhanced and promoted, could in the future be utilised in this way.

Finally it should be noted that typologies of winery visitors from a specific region or country are not inevitably interchangeable. This is due to factors such as:

- whether or not the wine region is adjacent to a large city;
- differing levels of facilities and infrastructure development;
- developmental and marketing history of the region and
- the nature or type of potential visitors.

12.2 What facilities and attributes of wineries are considered by visitors to be the most important?

As well as the more mundane provision of parking and toilet facilities (including provision for the disabled), wine tourism requires that at the very least, a basic level of facilities are provided by wineries to satisfy the motivations of visitors. At this low level these are the facilities sufficient to satisfy the primary motivations of tasting and purchasing wine. Invariably tasting rooms and cellar door wine sales facilities exist in practically all wineries catering for visitors. As noted above, visitors also have a number of secondary motivations and in order to satisfy these, a more diverse and greater range of facilities is essential. From the survey of wineries an extensive number of facilities currently exist across the Auckland Wine Region designed to satisfy the motivations of visitors. Secondary visitor motivations, and facilities often provided by wineries in Auckland to meet these are:

- ***educational***- vineyard/winery tours, historic buildings and wine museums;
- ***relaxation and leisure*** - picnic areas, barbecue areas and sporting facilities;
- ***socialising***- tasting rooms, function facilities and children's playgrounds;
- ***dining***- restaurants and cafes;
- ***rural setting*** - vineyard tours;
- ***purchasing ancillary items*** - sales of arts, crafts, gifts, souvenirs and
- ***entertainment*** - function and conference facilities.

The fifteen individual winery attributes, grouped in terms of wine quality, service quality and environment, form part of the decision making process of wine tourists when making wine purchase decisions during the course of their visit. Both surveys asked respondents to rate these attributes on a five point Likert scale by individual attribute and overall by group. With both surveys although the overall groupings were ranked similarly, individually the attributes were ranked quite differently. The overall group rankings were agreed by both surveys to be:

- wine quality,
- service quality and
- environment.

When converted to Likert scores, unsurprisingly producers, with the exception of the importance of "wine quality" and "wine taste" scored each individual attribute higher, while all three groupings, especially the "environment" attributes scored considerably higher. However the actual rankings of the importance of attributes differed considerably between the two surveys. The differences were quite marked especially with regard to attributes included in the "service quality" grouping, which were generally all ranked as of greater importance by the producers than the consumers. With regard to the attributes constituting the "environment" grouping, consumers tended to rank these of greater importance than did producers. Of the "wine quality" attributes, producers ranked both "price" and "label" of being of far greater importance than did consumers.

To the consumer, wine tourism is an experience of "wine country" entailing all of the senses. It must be fun, educational, culturally authentic and hopefully romantic. The quality of the wine and the reputation of the winery can be regarded as the most important factors coupled with the ability for visitors to taste before purchasing wine. Special offers of wine, not normally available through normal channels is also appreciated by many visitors. Knowledgeable and friendly staff leading to an elevated level of customer service is of consequence for winery visitors. For wine tourists, education by way of winery or vineyard tours, the opportunity to meet with the wine-maker or owners and avail oneself of other wine interpretative opportunities, are all considered by wine tourists as service facilities complementary to their primary motivators.

Finally the rural setting, ambience and an attractive visitor oriented design are integral to a satisfying visitor experience. Wine and food are part of a "life-style" experience. Together with an association with arts and crafts they create a level of sophistication appealing to urban professionals who are part of the "baby boomer" generation. A younger generation however, must be reached in a different way.

12.3 Do wineries wish to attract additional visitors?

The research indicated that across every sub-region practically all wineries regarded wine tourism as important to their business. The reason for this importance varied depending upon location and winery size. For small wineries and for those located in sub-regions oriented towards tourism, wine tourists provide a direct sales outlet generally at higher margins than if the normal distribution channels (if available) were used. For larger wineries, visitors are used to enhance brand recognition of both wine and winery. The fact that wine producers of varying sizes are utilising visitation and direct customer contact as a method of creating better customer relationships, educating the consumer, testing new products, building stronger brands and images as well as selling wine is indicative of the significance of visitors to wineries. In many cases it is wine tourism that helps to nurture innovation and the developments that keeps wine regions vibrant.

Faced not only with a stagnant local market, increasingly reliant upon imported wines, but also with a projected glut of grapes as more recent plantings come on stream, the wine industry must increasingly rely on either additional export sales and/or sales made to both domestic and international tourists. The research indicated that across the Auckland Wine Region this problem is well recognised (see Section 11.9 of Chapter 11) and that increased visitation is favoured by many wineries.

12.4 Can wineries attract greater levels of visitation by providing further facilities and by using market segmentation for promotional purposes?

To expand its consumer appeal wine tourism must emphasise its rural and cultural association, healthy living and its contribution to the environment. Wine tourism is a form of special interest travel associated with the appeal of wineries and wine country. It is a form of niche marketing, destination development and a chance for sales made directly to the consumer as well as marketing on the part of the wine industry. As well as a knowledge of affiliated groups/associations membership (Example: wine clubs), demographic, psychographic and geographic characteristics forms of research are now available to permit a segmentation of wine tourists, leading to a better identification of target markets. Accomplishment in this task will tend to move beyond the urban professional "baby boomers" and appeal to other sub-markets such as younger people, affinity groups, conventions, meetings, events and even general purpose tour groups.

Most winery visits are planned (78%) and prior to their visit a number of information sources (3.10) are consulted by winery visitors of which recommendations from family and friends (71%) are the most important. The provision of adequate sources of information available to such additional sub-markets is a vital part of this target-market diversification.

At the international level it can be anticipated that wine tourists will travel in increasing numbers from and within countries that import and consume per capita a considerable volume of wine. The origins of such wine tourists are likely to be the United States, United Kingdom, Canada, Australia, New Zealand and other countries in Europe without a domestic wine industry (Examples: Norway, Sweden, Denmark and the Netherlands) and the emerging markets in Asia (Examples: Japan, Taiwan, Singapore, South Korea and possibly China).

12.5 What levels of networking currently exists as between wineries (Example: wine trails) and as between the wine and tourism industry generally?

In common with many other studies the research showed that in the Auckland Wine Region that a level of networking already exists as between individual industry members. The wineries all belonged to New Zealand WineGrowers (formerly Wine Institute of New Zealand) and additionally around half of all wineries participated in wine (and food festivals) and wine trails. However their participation level in tourism organisations is generally fairly low across the Auckland Wine Region, although somewhat higher in the two sub-regions oriented more towards tourism. There are few organised wine tours either within or between the sub-regions although this does vary by sub-region. This lack of inter-industry cooperation, also observed in a number of other studies, largely reflects the production focus of wineries and the lack of regional and sub-regional "umbrella" organisations to manage the interrelationships between the two industries.

The question then arises as to who will take the lead role in wine tourism and how will the essential partnerships or alliances be molded. A prominent local winery may take this key role but it should be anticipated that tourism and wine industry organisations should at the very least cooperate for both planning and marketing initiatives.

12.6 How can these be enhanced in the future to further promote wine tourism?

The three viewpoints - the consumer, the wine industry and the destination should all be recognised as stakeholders, each with their own objectives and priorities. Accordingly alliances or partnerships are necessary in order to make wine tourism work for all participants. It is crucial that the wine and tourism industries cooperate to comprehend the motivations of the visitor and what they demand of wine regions, as well as attaining a better understanding of the product and the affinity that both industries have with their customers.

Using the systems approach of the wine tourism market model (see Figure 4.0 of Chapter 4) an understanding of this "system" is the starting point for its planning, development and marketing. The interactions of its components (consumers, producers and destinational region) largely define the system. An "umbrella" organisation can both represent and embody all of these diverse interests. On the supply side, wineries are clearly the pivotal attraction but other attractions and services must also be provided for a comprehensive "wine country" experience. Such "umbrella" organisations have a number of crucial functions. These include:

- marketing;
- resource protection and

- encouraging collaboration between the two diverse industries.

Governmental involvement at either the local, regional or national level is a compelling solution to the problem of creating such an umbrella organisation between the two reluctant industries. Australia has used this approach with great effect by developing both regional and national organisations charged with formulating and administering wine tourism strategies. As with Australia such an approach can lead to the multiplication of wine (and food) festivals/events and the expansion, by both number and size, of wine tours to and within wine regions. Competitive advantage can also be sought through the creation of wine and food package tours, routes and events. The unfortunate example of Napa Valley should however always be remembered - unbridled expansion will eventually serve only to destroy the very resource base underpinning the wine tourism product itself.

12.7 Issues of Validity and Reliability

In the case of quantitative data, validity is concerned with ensuring that the survey instrument measures the attributes that it is supposed to measure while reliability is concerned with ensuring that on repeated occasions, with the same respondent, that the same result is obtained (Zikmund, 2003; Easterby-Smith *et al.*, 2002).

When the surveys were originally designed care was taken by the focus group to ensure that content validity was sufficient, in that as far as possible all questions were carefully worded to ensure that they reflected the information being sought. By using on-site interviewers interpretation of questions were readily available to all respondents. Additionally, when the results of the two surveys were considered (see Chapter 10 and Chapter 11) the results were compared and contrasted wherever possible with other similar studies. The results were fairly similar and as far as possible notable differences were explained in the text.

With regard to reliability, both questionnaires contained at the end a series of statements (see Question 23 of Appendix G and Question 15 of Appendix H) which could then be correlated with other responses contained in the questionnaire. In the case of Questionnaire one by correlating these statements with the related questions, the value of the correlation coefficient r varied from a low + 3.73 to a high of + 8.74 and a mean value of $r = +6.24$ for all connected questions. In the case of Questionnaire three, the statements were more specific and the correlation coefficient varied from a low of + 6.13 to a high of + 9.26 with mean of $r = +7.89$. Given the nature of the two surveys these measures were all regarded as being most satisfactory.

12.8 Summary

The characteristics of wine tourists in the Auckland Wine Region were discussed in terms of their demographic, socio-economic, psychographic and geographic characteristics. Additionally their previous wine experience and knowledge were also considered together with both primary and secondary motivators for visiting a winery in the Auckland Wine Region. Because of the present demographic structure of New Zealand's population, strategies were considered to counter the problems perceived in the future as the wine "baby boomers" age and a new generation (Generation X) succeeds them. It was noted that consumer characteristics may vary considerably as between sub-regions, regions and countries.

The various facilities currently available to wine tourists in the Auckland Wine Region were considered and related to the various motivators that these facilities attempt to satisfy. Winery attributes considered by consumers to be of importance when making purchase decisions were compared and contrasted with the views of wineries. Both groups agreed over the rankings of the overall importance of wine quality, service quality and environment but their views over the importance of individual attributes differed greatly.

Practically all wineries wished to attract additional wine tourists, but their reasons varied depending upon size and location. For smaller "boutique" wineries and for those located in the sub-regions more oriented towards tourism (Waiheke Island and Matakana/Mahurangi) additional sales at higher margins were considered important. For the larger wine producers image and brand building were the major considerations. There was a general recognition of the looming problem of a wine surplus. Additional exports or additional sales to either domestic or international wine tourists were both seen as possible solutions to this future problem.

Diversification of the target market away from the present generation of wine consumers is recognised as being essential for the future expansion of both wine drinking and wine tourism. By using available research new niche markets can be targeted by promoting those wine tourism benefits appropriate for these newly identified market segments. Younger people, affinity groups, conventions, events and even general-purpose tour groups are all possible target markets for the future. The image nurtured by wine tourism is not at all compatible with that of "mass" tourism and niche marketing to additional targeted groups is clearly the way forward. As well as the domestic market, international visitors should also be targeted to a greater extent than at present. This group is currently under-represented as winery visitors, in spite of a constant stream of arrivals to Auckland. As well as visitors from the affluent English speaking countries an effort should also be made to attract international visitors from the newly emerging markets of Asia.

Although networks exist between members of the individual industries there are currently few interrelationships between the wine and tourism industries. Mainly this is because of the preoccupation of wineries with production issues. This highlights the need for an all encompassing organisation engaged in marketing, planning and resource protection.

Alliances and partnerships between the two industries are prerequisites if the aspirations of stakeholders (consumers, producers and destinations) are to be met. Governmental involvement at the local, regional or national level may be needed to start this process. Australia has adopted this approach and has developed both regional, state and national wine tourism strategies as a result.

An increase in the number of wine (and food) related events/festivals, wine touring companies and package tours has been the consequence of this approach. The over-expansion of wine tourism can however lead to a range of economic, social and environmental problems as illustrated by Napa Valley in California.

Issues of validity and reliability were considered when the questionnaires were first designed by the focus group. Content validity was considered at this stage and the wording of questions scrutinised to ensure that the required data would in fact be obtained. Interviewers were always available to assist on-site consumer respondents with the first questionnaire while the third questionnaire took the form of a structured interview. Results from both surveys were compared and contrasted with earlier studies and differences wherever possible were considered. Reliability of the questionnaires were assessed by using a series of statements for which a coefficient of correlation could be calculated by comparing responses to those of the related questions.

Chapter thirteen: Conclusion

13.0 Introduction

Wine tourism is now an important constituent of both the wine and tourism industries. Only recently has this relationship been acknowledged by the two industries, researchers and various levels of government. For the tourism industry, wine regions are visitor attractions providing sufficient motivation for tourists to visit the area. While for the wine industry, wine tourism assists wineries to build customer relationships and an opportunity to make wine sales directly to consumers.

World-wide, although the quantity of wine being consumed is declining, both quality and price has increased considerably during the last two decades. Because of the changing demographic structure of the New Zealand population new niche markets both domestic and international must be located and targeted if further progress is to be made.

Tourism is currently a major industry in New Zealand at both the domestic and international levels. Special interest, activity based tourism is one of the fastest growing segments of the tourism industry. Auckland, the country's largest city, needs additional attractions to ensure that the City and environs share in the national growth of the tourism industry. The five wine sub-regions of the Auckland Wine Region constitute an underdeveloped and underutilised destinational attraction.

This chapter reviews the current state of wine tourism in New Zealand generally, and more specifically within the Auckland Wine Region with a view to considering future trends as they affect wine tourism as a concept, consumers, producers and destinations at the regional and sub-regional level. As a result of this review, areas of possible future research are identified.

13.1 The Future of Wine Tourism as a Concept

> ... when people purchase wine they are buying much more than a physical product. They are consuming images, lifestyles, experiences and places .. the romance of wine. When people visit winescapes and interact with their components such as the wineries and purchase wine, they are taking their memories home in a bottle - and they can keep doing so for many years to come, every time they purchase, even though they may not come into physical contact with that place again. (Cambourne *et al.*, 2000, p. 240)

Although useful for its original purposes, the original definition of wine tourism (see Section 4.2 of Chapter 4) is now considered by some researchers to be too constraining for the future (Cambourne *et al.*, 2000), and should be broadened as a concept both spatially and temporally. Frochot (2000) noted that wine tourism in France is normally associated with other forms of cultural tourism such as visiting heritage buildings within a wine appellation, with visits to wineries being an adjunct to the main purpose of the tour. At a temporal level, subsequent restaurant meals may involve wine produced in a wine region previously visited, thereby evoking the memories of that earlier experience and thus becoming an additional dimension to that earlier visit (Mitchell, in progress).

Trends in wine consumption are changing world-wide. Although the quantity of wine consumed is now much less in many countries (see Table A.2 of Appendix A) people are now tending to drink quality wines at higher prices. As the international trade in wine continues to grow, increasingly consumers are exposed to wine produced in other countries. Additionally, wine consumption in a number of the newly emerging Asian markets is also flourishing. These trends all bode well for both wine and wine tourism in New Zealand generally and more specifically for the Auckland Wine Region.

Because of wine tourism, wine is becoming analogous with attractive wine country experiences, cuisine, culture and a healthy life-style. Wine consumers are older, better educated, more affluent and tending to favour all forms of cultural and rural tourism. For the next two decades urban professional members of the "baby boomers" generation will remain the primary target market ensuring notable successes for both wine and wine tourism. In the foreseeable future, as wine tourism becomes a major niche market both locally and globally as well as a very substantial development force in successful wine tourism destinations, the sector will receive the planning, management and research attention that it deserves.

Currently wine tourism in Auckland is still seen as a curiosity, but as it grows it will gradually become more main-stream. Both domestically and internationally, tourism is New Zealand's most constant and largest growth industry and all of its activity based, culture dependent, niche markets are destined to flourish. Auckland's wine sub-regions are well placed to develop into substantial tourism attractions in the future linked with other forms of touristic activity (Examples: regional cuisine, heritage, conventions). However, taxes, licensing regulations, urban encroachment, land use controls, environmental regulations, excess alcohol-driving campaigns, over-development, conflict with residents and many other issues face the wine industry and will serve to challenge Auckland's wine tourism development in the future.

13.2 Issues Related to Wine Tourism Consumers

It is vital that the wine and tourism industries collaborate to understand the motivations of the consumer and what brings them to the wine regions as well as acquiring a better awareness of their product and the relationship that they have with their customers. For wine country experiences, as with all types of cultural tourism, the package is normally the product. Day-trippers and free independent wine tourists will tend to remain the core market segment in many areas especially those from cities adjacent such as in the Auckland Wine Region. However, even they can be marketed to, using event-related and all inclusive get-away packages, especially to the less accessible sub-regions of Waiheke and Matakana/ Mahurangi. For group tours and international and inter-regional visitors some degree of packaging is both advantageous and essential in order to "clinch the sale". Ultimately wine tourism is activity-based cultural tourism. It is a combination of wine country experiences - an aesthetic blending of wine, food and lifestyle that will continue to entice and gratify the discriminating wine tourist.

In the future wine tourism markets will tend to broaden their appeal, especially to members of the generation succeeding the "baby boomers". This will tend to be achieved by appealing to the experiential traveller seeking educative, healthy, green, humanistic and other complementary components especially by the utilisation of new technology such as cyber-marketing. In Auckland, international visitors remain a largely untapped market. Increasingly the wine-tourism market will become globalised as middle-class consumers from the English speaking western countries and the newer, emerging markets of Asia, travel to places such as New Zealand, that produce the wine and food with which they have already become familiarised.

13.3 Issues Related to Wine Tourism Producers

Wine tourism is especially significant for the "boutique" wineries of the Auckland Wine Region because of the scope that it gives for highly profitable, direct, consumer sales. For wineries of all sizes, competitive advantage flows from branding efforts. This is all part of the positioning process used in order to target certain segments of both the domestic and international market. Wines, wineries and wine regions can all be branded to entice consumers by the use of compatible and consistent themes of imagery, names, designs and promotions.

To be successful in wine tourism, wineries must always be oriented towards the visitor. Wineries are the key attractions of wine regional destinations and they must endeavour to maximise the satisfaction of their visitors. Winery owners and staff are part of the attraction and forms of training for service quality are fundamental to their operation. The successful winery attraction should provide for the education of visitors, direct sales and relationship building, while attractive visitor oriented design of facilities is a basic necessity to create the required ambience.

Within the Auckland Wine Region numerous small or "boutique" wineries have been established with many or most being dependent upon visitors for sales. As well some wineries have now become destinations in their own right with the addition of restaurants, accommodation, events and recreational facilities. Large wine companies, with multiple wineries in other wine regions, have also discovered the importance of wine tourism as a sales and marketing tool especially with regard to branding.

Consumer research is always a requirement and the quality of the wine produced and services provided must always be assured. The fact that Auckland's wineries of all sizes are using visitation and direct customer contact as a means of improving relationships with customers, educating the consumer, testing new products, building both stronger brands and images as well as selling wine is indicative of the importance of wine tourism to the Region's wine producers.

13.4 Issues Related to Wine Tourism Destinations

Because wineries are the core attraction in the wine tourism market-place a wine region needs a critical mass of wineries as well as further complementary attractions to bring visitors to the region. However wine tourism can also prosper by taking the product to the people (Examples: Devenport Wine and Food Festival, St. Helier's Food and Wine Festival).

Additional attractions and services are also needed in order to support a successful wine tourism industry. Interpretative visitor centres, wine villages, vineyard/winery/wine country tours, wine themed festivals and events, wine routes, fine dining, accommodation and a range of complementary recreational activities are key components on the supply side of the wine tourism market-place at a destinational level.

Auckland's wine regions must stress authentic cultural and lifestyle experiences in which wine is an important ingredient. This involves destination branding so that each wine sub-region is unique and is recognised for its wine and attractive tourist experiences. Napa Valley, in California illustrates how substantial wine tourism can become along with some of the problems that success may produce.

Although somewhat limited in Auckland, cooperation between both wine and tourism industries by way of alliances or partnerships for marketing, promotion and the facilitation of research is an essential ingredient in wine tourism. Initial governmental involvement, although not essential, is probably desirable because of the additional funding requirements. The Australian experience confirms how the elevation of wine tourism (with the assistance of government) to a high priority at both regional, state and national levels can ensure its eventual success.

Wine production needs an adequate resource base. This includes the right soils, substantial water resources and both viticultural and wine-making skills. Wine tourism extends these requirements as the wine tourism destination must additionally contain complementary attractions and also be both attractive and accessible to visitors. The wine sub-regions of Auckland generally conform to these requirements, although additional wine routes and better signage are investments that need to be made for the future. Conflicts with other resource users, residents and restrictive local regulations must be overcome whenever they occur. Protection of the available resources is clearly critical for sustained success.

When developed and marketed to be sustainable over the longer term, wine tourism will offer substantial benefits to the host community, destinational region, and the wine industry as well as other tourism and hospitality businesses of the Auckland region. The "value pyramid" concept (see Figure 7.0 of Chapter 7) portrays the way wine production adds economic value to grape growing and how the attraction of tourists adds value to wineries and communities. Both wine tourism and wine sales (especially exports) are mutually reinforcing. Additionally wine tourists can be high-yield quality tourists, especially for wineries and wine destinational regions. The normal patterns of seasonality of demand in destinations can at least in part be countered through the all-year appeal of wine, viticulture and wine related events.

The marketing of wine themed events is able to bring vibrancy to both wineries and the wine sub-regions of Auckland. It also facilitates packaging and sponsorship and leads to increased industry partnerships. Wineries are a complete venue for functions and special events while wine (and food) festivals will help make the five wine sub-regions of the Auckland Wine Region especially inviting during the off-peak tourism seasons. Events furnish unlimited image enhancement opportunities, free publicity and can also foster community support for wine tourism in general. Each wine sub-region in Auckland should conduct annually at least one hall-mark wine themed event, as well as other smaller events spread throughout the year, that give the sub-region high value in terms of visitor numbers, spending and exposure.

The wine sub-regions of Auckland must maintain and enhance their reputation for fine wine of high quality. The research indicated that few people will travel to a wine region/sub-region or to wineries not known to produce quality wine. Regions/sub-regions with reputations for consistent quality wines are much more likely to prosper. Wine tourism can often serve to reinforce the communication of quality by drawing attention to new wines and wineries.

Wine tourism is highly competitive between both wineries and destinations Competition is growing rapidly with more wineries and more competing wine regions expected to use sophisticated marketing tools in the future. Wine tourism destinations should focus on high quality, high yield segments of the market. Wine tourism can never be mass tourism. Both wineries and destinations must pursue the niche markets that provide high yield (higher spending and longer stays in the area) and high quality (visitors who come specifically for the areas attractions but also respect its environment).

13.5 Future Research

As earlier noted wine tourism, being a newly recognised topic considered worthy of study, has to date attracted little research. Much of the existing research has taken place fairly recently by only a small number of researchers. There are a number of topics related to wine tourism within New Zealand and more specifically related to the Auckland Wine Region for which further research is desirable. Some of the key areas that require additional research are:
Wine Tourism Consumer:

- How can the generation of wine consumers succeeding the "baby boomers" (generation X) be encouraged to migrate from beer to wine?
- How do wine consumers become transformed into wine tourists?
- How can tourists, not motivated by wine, be convinced to try a wine tourism product or package?
- In-depth qualitative research in the form of interviews could be used to examine the feelings of "obligation to make a purchase" following a winery tour or free tasting.
- How can visitors from the newly emerging wine markets of Asia be encouraged to become international wine tourists?

Wine Tourism Supplier:

- Who makes the best wine tourist in terms of yield to the winery?
- What is the role of wine tourism in brand and image promotion?
- Case studies of successful wineries in wine tourism. Particularly with regard to their costs and revenues.
- What are the most effective sources of information provided by wineries in order to communicate with winery visitors or potential visitors?

Wine Tourism Destination:

- What is the role of wine tourism in economic development or regional regeneration?
- How can the wine tourism destinational experience be improved?
- A detailed analysis of the wine tourism alliances, interrelationships and networks existing within and between public and private sectors.
- What should constitute the ideal wine tourism experience for specific market segments?
- Additional research is needed on the positive and negative impacts of wine tourism on the economy, environment and the local community in a wine tourism destinational region.

13.6 Summary

As a concept the initial definition of wine tourism is seen as being to restrictive in the future as it fails to acknowledge both the spatial and temporal aspects of the wine tourism phenomenon. The urban professional members of the "baby boomer" market are now aging and although the current market for both wine and wine tourism is currently assured, additional niche market segments must be located and targeted in the future if further expansion is to take place.

Orientation towards the wine tourist is essential if Auckland's wineries are to attract increasing numbers of visitors. This is especially important for smaller wineries relying particularly on direct consumer sales but even for larger producers, brand development provides a significant incentive.

Future success for the wine destinational sub-regions of Auckland will largely depend on enhancing their reputation for fine wine production as well as the provision of complementary attractions, additional wine events, further wine routes and establishing joint-industry coordinating organisations to market, promote and provide market-place research for participating businesses.

Finally the need for future research in wine tourism regions generally and the Auckland Wine Region in particular was considered and a series of possible research questions raised with regard to consumers, producers and the wine tourism destination.

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Glossary

Alcohol A by-product of the fermentation process.

Alcohol by Volume The amount of alcohol as a percentage of the contents. This figure is supposed to be printed on every bottle of wine sold in New Zealand, but imports sometimes manage to escape.

Amelioration Dilution - the addition of water and/or sugar to juice, must, or wine.

AOC *Appellation d'Origine Controlée.* French system of vineyard areas legally defined according to grape varieties, yields, methods of viticulture and alcoholic strength.

Apéritif Appetizer wine - wine containing added flavoring from herbs, roots, seeds, and spices, such as Vermouth.

Appellation Geographic source - the specific location where a given wine was grown.

Aroma Fruit Fragrance - that portion of wine bouquet contributed by the fruit. Aroma is to be distinguished from "bouquet".

Authenticity Relates to the accurate and genuine manifestation of traditions, cultures and wine-making items.

AVA Approved Viticultural Area. American version of the French AOC system but much less stringent. A guarantee of geographical origin only.

Balance Sensory term relating to the ratio of dryness and acidity.

Balling Analytical measurement of wine viscosity.

Barrique Wine barrel containing approximately 60 US gallons.

Barrel Fermentation The process of fermenting the infant wine in oak barrels rather than stainless-steel tanks. It can often be detected through a mealy nutty taste.

Baumé Scale for measuring dissolved solids.

Bentonite A montmorillonite clay compound used as a clarification agent in wine processing.

Bianco Italian term relating to white wine.

Blanc de Blancs French term relating to white wines made from white grapes.

Blanc de Noirs French term relating to white wines made from black grapes.

Blending A perfectly legitimate way of improving the quality of different wines, not being perfect individually.

Blush Very light pink wines, generally made from a brief fermentation of red skins just prior to pressing.

Body Sensory evaluation of wine viscosity - relates to lightness or heaviness of mouth feel.

Bottle Fermentation Secondary fermentation of wine in special bottles designed for high pressures - captures natural carbon dioxide to make wine effervesce, or "sparkle" - the traditional Champagne bottle fermentation method is called "méthode champenoise".

Botrytis cineria Same as noble rot.

Bottle Shock Refers to wines suffering a temporary reduction in bouquet and flavour due to addition of preservatives, final filtration, and bottling - sometimes called "bottle sickness". Recovery generally appears within a few weeks.

Bouquet Sensory term relating to the entire fragrance of a wine, comprised chiefly by fruit aroma, fermentation flavours from yeast and/or bacteria, wood essences and other components.

Brix Analytical measurement of total dissolved solids in juice or must, most of which are sugars.

Brut Unsweetened (describing champagne); normally naturally fermented in the bottle.

Bung Stopper, usually made of wood or glass, which is used to seal a keg, barrel, cask, or some other bulk wine storage vessel.

Burgundy A generic red table wine of widely varying character and style ranging from dry to rather sweet, from light to full-bodied and from pale crimson to dark, purplish red. Can be regarded as the New Zealand version of the French "vin ordinaire". May be made of varying grape varieties.

Capsule The decorative finishing closure over a cork or cap on a wine bottle, usually made of plastic or non-lead metal alloys.

Carbohydrate Chemical term relating to a food energy compound such as sugar and ethyl alcohol comprised of carbon, hydrogen and oxygen.

Carbon Dioxide The tasteless and odorless gas produced by fermentation.

Carbonic Maceration Method by which whole grapes are fermented in a closed vessel during which the carbon dioxide gas generated from the fermentation permeates the grapes to release greater intensity of colour and flavour.

Carrying-capacity Used in tourism planning in the consideration of both ecological and social impacts. Ecological carrying capacity in relation to tourism is the level of visitation beyond which unacceptable ecological impacts will occur. For the visitor, the social carrying capacity is the level of visitation beyond which satisfaction is no longer experienced because of excessive crowding or noise or limited access to service. For the host community, the social carrying capacity is the level of visitation beyond which unacceptable change occurs - this can be physical, cultural, economic, ecological or psychological.

Casa Vinicola Italian for winery.

Caskiness Sensory term relating to wines which may have been aged or stored in casks which were not cleaned or treated properly beforehand - much the same as "tanky".

Cassé Sensory term to describe wine haziness, generally due to high levels of copper and/or iron.

Cava Italian term for sparkling wine.

Cave French for cellar.

Cépage French for "variety" or "cultivar". The composition of a wine in terms of grape variety.

Chablis A widely available generic white table wine it is almost nearly always dry or nearly so. The essential point of this style is a light, clean fruity flavour (which is sometimes achieved by a hint of sweet as part of its make-up). Can be regard as the "vin ordinaire" of the whites - made from any grape variety.

Chai French for wine cellar - most often Bordeaux wine cellars.

Chaptalization The addition of sugar to must or juice before fermentation into wine.

Character Sensory term describing the entire profile of a wine including colour, clarity, bouquet, balance, body, after-taste and overall impression.

Charmat The bulk, or tank method of making ordinary sparkling wines.

Château French for "castle" or "mansion" - the wine estate comprising vineyards and chai in France, usually in Bordeaux.

Claret A generic red table wine. It is generally a lighter more delicate wine than Burgundy.

Clarify to make a wine brilliantly clear - same as fining.

Classified Growth A particular vineyard, domaine, estate or other geographical locale which is officially recognized by a national government as a controlled appellation of wine origin.

Colloid The material in suspension usually protein, that causes wines to be cloudy.

Colour Relates both to the hue and density of wine pigments.

Commoditisation (Also called commodification) Changing traditions, cultures or artifacts from their original form into saleable products in response to (tourist) market demand.

Community-based festival or event A themed public occasion designed to occur for a limited duration and to celebrate valued aspects of a community's way of life.

Competitive advantage An organisational advantage a firm has over its competitors that "grows" out of the value a firm is able to create for its buyers that exceeds the cost of creating it. Value is what the buyer is willing to pay, and a superior value stems from offering lower prices than competitors for equivalent benefits or providing unique benefits that more than offset a higher price.

Concentrate Dehydrated grape juice, usually at a brix of 60 or more, which is used for sweetening juice, musts, or wines deficient in natural sugar - sometimes reconstituted with water and fermented to make low-grade wines.

Conservation All the processes of caring for a place so as to retain its fundamental values and significance.

Cooperage Cellar term relating to wooden containers, but sometimes loosely used to also include vessels constructed of glass, stainless steel and other materials.

Co-operative Winery owned by a group of member grape growers.

Cork Bark of the cork oak (*Quercus suber*).

Corked Tainted by a faulty cork. Often detected by a smell like old wet sawdust.

Coulure The failure of grape berries to develop after flowering.

Cradle Device in which old bottles with sediment are placed for cork removal - often used for holding bottles while being poured.

Cream of Tartar Potassium Bitartrate crystals precipitated by new wines, especially in colder storage temperatures.

Cru Literally, "growth". Used of wines derived from vineyards of a particular quality.

Cruise A ship voyage taken wholly for reasons of leisure and recreation.

Cultivar A viticultural term related to a man-made hybrid, as distinct from the term "variety" which usually refers to natural progeny.

Cultural authenticity The perceived legitimacy of a site or experience that reflects its traditional form as closely as possible.

Cultural sustainability The maintenance of cultural practices and values that also recognises the dynamic nature of culture and the aspirations of communities to ensure their cultures remain creative and vigorous.

Cuvage/Cuvaison The period that red wine spends in the fermentation vat, in contact with grapes' skins and pips.

Cuvée A French enology term relating to a special blend, such as that which is designed for secondary fermentation into sparkling wine.

Dégorgement The technique of removing the plug of sediment from a bottle of sparkling wine after the rémuage, or "riddling".

Dégustation-Vente Tasting wine sale in France.

Density Sensory term relating to the amount of certain character constituents, usually colour.

Dessert Wine A sweet wine generally consumed with or instead of dessert - made from sweet table wine "fortified" by up to about 20% alcohol content with brandy.

Destination mix The combination of attractions, facilities, accommodation, forms of transport and accessibility, together with hospitality services, offered by a destination.

Dinner Wine Wine less than 14% alcohol generally consumed with meals (refer table wine).

Domaine French for "vineyard estate" or "wine estate", most commonly used in the Burgundy region of France.

Dosage Addition of wine to sparkling wines directly after dégorgement in order to replace the expelled "ice plug".

Doux French for sweet.

Drawing power The capacity of an attraction or destination to attract tourists from their point of origin and away from alternative attractions and destinations. Because of travel distances and times involved, rural attractions and destinations must have considerable drawing power to compete successfully for tourists.

Dry Sensory term used in reference to an absence of sweetness.

Effervescent Sensory term for "sparkling" - the discharge of carbon dioxide bubbles in wine.

Elegance Elegant. An elegant wine has grace and finesse.

Enology The scientific study of making wine (American English).

Entrepreneurship The process of creating or seizing an opportunity and pursuing it regardless of the resources currently controlled. Entrepreneurship involves the definition, creation and distribution of value and benefits to individuals, groups, organisations and society.

Enzymes Complex organic compounds that trigger chemical reactions.

Estate-Bottled Label term referring to grapes having been grown on the estate of the vintner or vineyards under estate control.

Esters Complex organic acid-alcohol flavour compounds.

Ethyl Alcohol Essential wine compound produced from the fermentation of grape juice or must - same as ethanol.

Extract Analytical term referring to total dissolved solids in wine - the same as Brix in juice or must.

Facultative Anaerobes Micro-organisms that can grow either with or without an oxygen source.

Fermentation Usually relates to the transformation of sugar to alcohol, carbon dioxide, and energy in response to enzymes produced by the growth of yeast - bacterial fermentation also exists in which malic acid is transformed to lactic acid or in which ethyl alcohol is transformed to acetic acid.

Filtration Cellar treatment in which wine is pressured through media in which suspended solids or micro-organisms are removed.

Fining Specific type of filtration in which agents such as bentonite are used to clarify wine.

Finish Sensory term relating to the last impression of a wine just before, during, and after swallowing, including aftertaste.

Fino Indicates a light dry sherry with about 17% alcohol. The style of Fino is to retain fruity flavours rather than a pronounced taste of oxidation.

Flavour Sensory term relating to olfactory values of taste such as "berry", "earthy", "fruity", "yeasty" etc.

Flor The word Flor on a label indicates that a light dry Sherry has been flavoured by a specific strain of yeast that grows naturally on sherry grapes in Spain.

Flowers Cellar term for a white film on the surface of wine, which may indicate the growth of white spoilage bacteria or wild yeast.

Fortified Wine Wine, which has been blended with brandy to increase the percentage of alcohol.

Foxiness Sensory term loosely used to describe the aroma of wines made from North American native *Vitis labrusca* grapes such as Concord or Niagara.

Free Run Juice or wine that flows from a press without the exertion of pressure.

Fruity Sensory term relating to a "fruit-like" value in bouquet and/or flavour.

Full Sensory term relating to a heavy density of one or another element of wine character.

Fumé Sensory term relating to wines having a pronounced floral bouquet, usually in relation to Sauvignon Blanc white wines.

Generic Label term relating to wine geography or type, such as "Burgundy" (wine grown in the Burgundy region of France) or "Vermouth" (wine type in which herb and spice essences are added). In this country it usually means a wine labelled as simply "New Zealand", rather than the actual region where the grapes were grown.

Green Sensory term relating to wines made from prematurely harvested grapes, or wines not fully developed in aging.

Gross Lees Cellar term referring to the large amount of initial sedimentation, which precipitates before and during fermentation.

Growth French classification system refer **cru.**

Hallmark event A major festival or event designed to promote awareness and appeal of particular aspects of a destination.

Heady Sensory term relating to table wines with a high alcohol content - the same as "strong".

Hock English term for German white table wines.

Hogshead Small wine cask.

Host community The people who live and work in the places tourists visit.

Hue Sensory term relating to colour, such as amber, straw-gold, brick-red, crimson, ruby etc.

Hybrid Viticultural term relating to the sexual crossing of one grape variety with another in order to create a new cultivar, such as the French-American hybrids Seyval Blanc and Chambourcin.

Ice Wine Wine made from grapes left to freeze on the vine after the normal ripening season. Often favoured by Japanese consumers.

Infrastructure All forms of construction and services relating to transportation (road, rail, and air) , utilities (electricity, gas, water and communications), healthcare and security services needed by tourist destinations and other inhabited areas.

Inseparability Tourists come into contact with a tourist organisation in order to experience a "performance" by the organisation's personnel. The organisation cannot produce this performance in advance and store it in preparation for the next service encounter. As a result, tourism personnel are inseparable from production, which, in turn, is inseparable from consumption by tourists.

Intangible Unlike manufactured goods, tourism's "service products", such as package holidays, are essentially non-material things; they are an experience of place at a particular time. As such, they cannot be tasted, touched or sampled prior to purchase and are difficult to evaluate objectively.

Interpretation A way of communicating ideas and feelings that can help enrich people's understanding and appreciation of the world and their role in it. Also "adds" value to a wine tourism experience.

Late Harvest Wines made from grapes purposely left past peak ripeness in order to dehydrate berries, which concentrates sugar and flavour.

Leaf Plucking A viticultural term related to the removal of leaves along the bunch line of the vines in order to promote the ripening process of the berries by the sun. It may be performed either manually or by machine.

Leakage The loss of potential profits derived from tourism as these flow out of the destination to other areas - for example, as payments for goods and services that must be imported to meet the needs and demands of tourists and as governmental taxes. The extent of leakage greatly influences, the true value of tourism development for any destination.

Lees Production term relating to wine sediment, either from fermentation, clarification, or instability of acid salts, colour pigments, and other constituents.

Legs Sensory term relating to the reflux condensation of volatile wine components inside the glass. Long "legs" are widely believed to be the mark of superior wines. There is no co-relation however, as condensation rates are determined by the relative temperatures of the wine and the glass.

Leisure Product That which attracts visitors to a place - its cultural, sports and amusement facilities, its physical and socio-cultural features (primary elements), its accommodation, food and beverage, and shopping facilities (secondary elements) and its accessibility, parking and information facilities (additional elements).

Limits of acceptable change Related to *carrying capacity*. From the perspective of the resource, the point beyond which change brought about by encroaching tourism enterprises or infrastructure has unacceptable negative impacts.

Madeirization The oxidation of ethyl alcohol and acetic acid into aldehydes - the process employed in the making of Madeira, Sherry, and Marsala wines.

Malolactic Bacteria that transform malic acid to lactic acid, resulting in a "buttery" (diacetyl) flavour component.

Marc Production term referring to the rejected skins and seeds.

Market segment A homogeneous sector of the community that shares particular characteristics.

Marque French for "marks" usually in reference to "Grand Marque" Champagnes, the highest quality level.

Methuselah Very large wine bottle, usually containing 6L, often used in the Bordeaux region and Champagne regions of France.

Millesime French for vintage.

Mousseux French for "foaming" - a term used to describe wines that are effervescent, or sparkling.

Mulled Wine to which sweetening and spices have been added- normally served hot.

Multiplier effect A measure of the economic activity generated by tourism expenditure. The more money that is retained and circulated within an economy, the larger the multiplier effect.

Must Cellar term relating to crushed grapes.

Mutage The process of adding brandy to fermenting juice or must in order to arrest fermentation and retain remaining grape sugar as residual sweetness in the resulting wine - often used in reference to Port wines.

Nero Italian for dark red.

Noble Mould Viticultural term relating to *Botrytis cinerea* - a mould which permeates grape skins, allowing berry water to evaporate and remaining sugar, colour and flavour components to be concentrated.

Nose Sensory term relating to the evaluation of aroma and bouquet.

Nouveau French for "new" - generally relates to young red wines such as "Beaujolais Nouveau", which are made and marketed soon after each vintage.

Nutty Sensory term relating to the acetaldehyde "nut-like" flavour characteristics in Madeira and Sherry wines.

Oenology English (as opposed to American English) for "enology".

Opportunity cost The opportunity that is lost by choosing a particular course of action.

Ordinaire Plain or undistinguished wine.

Organoleptic Having to do with sensory evaluation.

Oxidation Chemical term relating to the reaction of wine constituents with oxygen, such as the aging of wine or the browning of colour.

Pasteurization Cellar term relating to the inhibition of spoilage micro-organisms by the controlled application of heat, generally between 160 and 180 ^{0}F.

Petillant Sensory term relating to wines which are just slightly effervescent.

pH Analytical term relating to the entire range of the most intense acidity at pH 0.0 to the most intense alkalinity at pH 14.00, with neutrality at 7.00 - often used as one of the several indicators of grape ripeness.

Phylloxera The grapevine root louse, more precisely known as *Phylloxera vastatrix*

Pomace Cellar term referring to the seeds and skins remaining in the press.

Pop Wine Wine containing added flavouring(s) from other berries, melons, and fruits. Also known as wine coolers.

Port A generic term used to cover a wide range of dessert wines. Port is made by adding Brandy to a must while the fermentation is in progress. The effect is to stop the fermentation and raise the alcohol level to about 20%. As port ages it change colour from red (ruby red) to brown (tawny).

Potassium Bitartrate Same as cream of tartar.

Press Juice or Press Wine Cellar terms relating to the juice or wine extracted under pressure - usually more dense in colour and excessively astringent from higher levels of phenols.

Product development Transforming natural and cultural phenomena into activities and experiences that can be sold to tourists.

Proof A measure of alcohol defined by the Government for the assessment of excise duty. It is measured by a system known as "Sykes" in the Commonwealth; roughly 100 percent means about 57 percent pure alcohol to volume. To complicate matters U.S. 100 percent is roughly 50 percent alcohol to volume.

Propensity to travel Higher among seniors than other age groups in developed countries because of fewer time constraints and greater levels of discretionary income.

Pruning A viticultural term related to the removal of selected vine growth from the previous year. The process is designed to enhance the vigour of the vine thereby producing new fruiting canes. The two main pruning methods employed are cane pruning and spur pruning.

Pungent An olfactory term - very aromatic, often earthy.

Punt Indentation in the bottom of a wine bottle originally intended to provide added strength.

Quality of life Relates to the physical and social attractiveness of a place. A range of factors contribute to making us feel good about being and staying in a place.

Racking Cellar term relating to the decanting operation in separating juice or wine from lees.

Rancio Sensory term used in reference to the bouquet of some maderized wines - has no connection with rancid.

REAL travel Real travel relates to the demand-side definitions of tourism and refers to various experiences that tourists find **R**ewarding, **E**nriching, **A**dventuresome and an opportunity for **L**earning.

Regional economic development Creation of new wealth by strengthening existing economic activity or creating new economic activity in regional areas. May be achieved through economic diversification, new enterprise development, income and employment creation, infrastructure development and investment

Regional tourism .Tourism activity centred outside major cities. Defined by the place where tourism occurs rather than the featured activities or experiences.

Residual Sugar A dry wine that has some sugar left after fermentation is described as having some residual sugar.

Rich Sensory term having the same general meaning as "heavy".

Rosé Pink wines generally made from a brief fermentation of red grape must just prior to pressing - typically more pigmented than "blush" wines.

Rounded Sensory term relating to wines which have a good balance and harmony of character and constituency.

Sauterne A generic white table wine. Individual bottles range from dryish (Sec Sauterne) to extremely sweet (Haut Sauterne). In general Dry Sauterne and Chablis are interchangeable names on inexpensive white wines.

Sec French for "dry".

Secco Italian for "dry".

Sediment The lees or organic matter thrown down by the wine kept in the bottle. Red wines have more sediment than white wines. This is because the colour pigment in the skins of black grapes produce very minute particles of mucilage. Mucilage is held in suspension in the wine for a long time. Eventually many of these particles and others of a vegetable character are fixed upon by some of the wine's tartrates or other salts and fall upon the glass inside of the bottle in the form of a crust or sediment. White wines throw no crust but may throw small flakes of tannin or gelatin which are not harmful to the taste. With New Zealand wines a small deposit of tartrates may be found.

Sekt German for "sparkling wine".

Sense of place A perception that includes factors that together contribute to a place's identity. It has tangible attributes like buildings, streetscape, landscape and winescape and intangible elements such as history, sentiment, memory, familiarity, civic pride and emotions that come from knowledge and caring for the place.

Sherry A generic term used to cover a wide range of appertiser and dessert wines. Grape brandies are added bringing the alcohol level to 17 - 20%. The fortified wines are then aged with a large surface exposed to the air. The aging turns the sherry to an amber/brown colour with a "nutty" flavour. In style they can vary between dry and sweet (dessert).

Special event A large, one-time or infrequent festival or event.

Special interest tourism Customised leisure and recreational experiences driven by specific expressed interests of individuals or groups.

Spritzig Effervescent (German). Many wines, especially some Moselles retain some carbonic acid in solution. This prolongs the life of the wine, keeping it fresh and should not be mistaken for fermentation.

Staged sets (from MacCannell, 1989) Term that refers to contrived spaces established for tourists. *Fronts* refer to areas deliberately set up for tourists to experience the legitimated tourist experience. *Backs* refer to private off-limits areas "off-stage", which are often of greater interest to more curious adventurous tourists. *Backs* may include the more "seedier" aspects of a destination.

Stakeholders Individuals or organisations with an interest or investment in tourism products or the outcome of a festival or event.

Strategic fit An effective combination of the firm's objectives; internal resources; resource application; management capabilities; external threats and changing market conditions; strategic analysis, decision making and implementation.

Strategy The pattern or plan that integrates an organisation's major goals, policies, and action sequences into a cohesive whole. A well-formulated strategy helps to marshal and allocate an organisation's resources into a unique and viable posture based on its relative internal competencies and shortcomings, anticipated changes in the environment and contingent moves by intelligent opponents.

Sulfite Cellar term generally referring to potassium meta-bisulphite, a source of sulphur dioxide used as a preservative and antioxidant in wines.

Sulphurous Smelling of sulphur dioxide; or in tasting - dry, slightly acid and unpleasant on finish.

Sur Lies Cellar term referring to holding new wines on the gross fermentation lees in order to promote malolactic fermentation and to extract complex flavours.

Sustainability Applied to tourism, it may relate to environmental, ecological or socio-cultural values of destinations. Sustainability is maintained so long as the impacts of tourism do not compromise these values.

Sustainable tourism development Generates positive social and economic outcomes while protecting important features of the natural and cultural environment.

Table Wine The name used to describe a whole class of wines naturally fermented to about 12% alcohol. The class includes all red, white, and pink wines with those qualities. The name derives from the primary use of these wines as mealtime accompaniments to food. Most are "dry" which is to say they have only a very small amount of unfermented sugar remaining - or none at all.

Tannic Sensory term relating to phenolic astringency in wines with a rather "leather-like flavour.

Tannin A group of phenolic compounds found in grape seeds, skins and stems, as well as in wood used for aging - tannins are antioxidants and thus serve to slow the wine aging process. Wines lacking tannins are flat - they are never quite bright and cannot last. Wines that contains too much tannin are perfectly bright but disagreeably sharp.

Tartaric Acid Principal organic acid in grapes - combines with potassium to form potassium bitartrate salts or cream of tartar.

Tawny Sensory term referring to amber-red colour, usually as a result of wines aged for long periods of time.

Teinturier A red grape that has particularly high density in colour, often used in blending to enhance colour deficient wines.

Terroir French terminology that encompasses the whole ecology of the vineyard: every aspect of climate, soil, weather, horticultural practices the viticulturists and some say even the soul of the vigneron.

Tirage A cellar term referring to the laying of bottles horizontally tier upon tier.

Total Acidity The aggregate of all acids measured in a given wine, the sum of fixed and volatile acidities.

Tourism service provider Any individual or organisation that supplies services to tourists, such as food, accommodation, transport, travel and leisure facilities.

Triage The removal of defective clusters and /or berries usually on a moving belt inspection line.

Tucking Viticultural term relating to the placing of canes behind the moveable wires attached to the trellis normally prior to trimming of the canes.

Ullage Air space in a bottle or other cellar container resulting from assimilation, evaporation and seepage.

Varietal Wine A wine labeled for the variety of grape vine from which it was predominantly made.

Variety An individual natural strain of vine recognized with a group of other closely related strains - for example Chardonnay, Riesling, Pinot Noir and Cabernet Sauvignon are each a variety of the *Vitis* genus and *vinifera* species.

Veraison Viticultural term referring to the point when grape berries start to ripen, softening and changing colour.

Vert French for "green" - often used in reference to wines made from under-ripened grapes or for tart young white wines.

VFR travellers Those who travel mainly to visit friends and relatives.

Vigne French for "vine".

Vigneron A wine-maker.

Vigneto Italian for vineyard

Vignoble French for vineyard.

Vin French for wine.

Vin délimité de qualité supérieure (VDQS) This French wine classification is that of the second tier below AOC but above Vin de pays. The wines are high quality and are from specific places or regions.

Vin de pays A French system invented in 1973 and fomalised in 1979 it extends the earlier AOC geographic concept. Related to more intermediate wines, but superior to vin de table it requires restricted grape varieties, non-blended with limited quantities, submission to a grape tasting panel and minimum alcohol content. There are three levels four are regional, fifty are departmental and more are locally specific.

Vin de table The basic level of French table wine. Also known less formally as **vin ordinaire**. Used for blending and distillation.

Vin ordinaire Refer vin de table.

Vino Italian for wine.

Vintage Label term relating to the year in which the grapes were grown - sometimes used in reference to a particularly good year of growth.

Vintner A wine producer.

Viticulture That part of horticulture which is to do with the cultivation of grape vines.

Vitis vinifera Viticultural term relating to the genus and species of "Old World" vines - the native wine-grape varieties of Europe such as Chardonnay and Cabernet Sauvignon.

Volatile Acidity Analytic term referring to the acidity produced by spoilage micro-organisms.

Wein German for wine.

Weinlehrpfad German for instructional wine path. To gain knowledge of local wine.

Weinstraβen Wine road in Germany. Publicised wine trails in wine regions.

Wine Cooler Refer Pop Wine.

Winescape A human landscape marked by the impacts of wine-grape production.

Wine tourism Tourism activity centered on the physical, social and cultural dimensions of the winescape and its components.

Woody Sensory term referring to wine which has the bouquet and/or taste of excessive wood aging.

Yeast Single-celled plant organisms that produce enzymes which convert simple sugars into ethyl alcohol, carbon dioxide gas and energy.

Yeasty Sensory term referring to wine which has the bouquet and/or taste of excessive exposure to yeast in "sur lies".

Zymase The enzyme produced by wine yeast which convert sugars to ethyl alcohol, carbon dioxide gas and heat energy formation.

Appendices

Appendices - Table of Contents

Appendix A - Miscellaneous Tables

Table A.1 - Summary: New Zealand Wine Statistics for the Eleven Years 1993 - 2003

Year	1993	1994	1995	1996	1997	1998	1999	2000	2001	2002	2003
Number of Wineries	175	190	204	238	262	293	334	358	382	398	421
Total Vine Area (hectares)	6,100	6,680	7,500	7,800	8,455	9,780	11,275	12,822	13,637	15,829	18 247
Producing Area (hectares)	5,980	6,110	6,110	6,610	7,410	7,580	9,000	10,197	11,648	13,787	15 479
Average Yield (tonnes per hectare)	7.1	8.8	12.2	11.4	8.1	10.3	8.9	7.9	6.1	8.6	4.9
Average Grape Price ($ per tonne)	718	867	887	829	842	1,005	1,054	1,153	1,441	1,634	1915
Tonnes Crushed	42,621	54,000	74,500	75,300	60,000	78,300	79,700	80,100	71,000	118,700	76 400
Total Production (millions of litres)	32.5	41.1	56.4	57.3	45.8	60.6	60.2	60.2	53.3	89.0	55.00
Domestic Sales (millions of litres)	37.4	28.5	30.9	35.6	38.8	38.2	38.4	41.3	36.2	32.6	34.4
Consumption per Cap. (litres NZ wine)	11.0	8.1	8.7	9.9	10.4	10.1	10.1	10.6	9.3	8.3	8.6
Export Volume (millions of litres)	8.6	7.9	7.8	11.0	13.1	15.2	16.6	19.2	19.2	23.0	27.1
Export Value (millions of NZ$FOB)	48.3	41.5	40.8	60.3	75.9	97.6	125.3	168.6	198.1	246.4	281.9
Wine Imports (millions of litres)	19.694	32.695	25.515	21.318	22.409	28.231	27,853	28,556	33,411	41,890	44 373
Consumption per capita (litres of all wine)	16.8	17.3	15.9	15.6	16.6	17.3	17.0	17.1	16.9	18.9	19.7
Stock : Sales Ratio	1.21:1	1.62:1	2.14:1	2.06:1	1.66:1	1.72:1	1.76:1	160:1	1.72:1	2.34:1	193:1

(Source: New Zealand WineGrowers (adapted), 2003; 2002; Wine Institute of New Zealand Inc. (adapted), 2001; 2000; 1999; 1998; 1997; Statistics New Zealand (adapted), 2002b)

Table A.2 - International Per Capita Comparison of Wine Consumption for the Period 1991 - 1997

Year Country	1991	1992	1993	1994	1995	1996	1997
France	68.34	67.00	64.50	63.29	60.27	58.97	63.40
Luxembourg	59.98	60.30	59.70	59.30	58.97	58.77	63.40
Italy	62.45	60.28	60.28	60.18	59.07	58.86	58.80
Portugal	61.68	62.00	55.00	54.37	53.78	50.76	56.44
Switzerland	49.02	47.20	44.47	45.75	46.32	42.38	41.20
Argentina	54.39	55.01	51.63	49.98	48.84	47.65	40.99
Spain	39.77	39.88	39.10	38.34	37.24	33.21	38.00
Slovenia	41.20	40.00	39.00	38.74	38.27	37.47	36.76
Greece	32.65	32.40	31.50	31.21	32.67	31.74	31.90
Hungary	33.50	30.00	30.00	30.73	30.12	30.84	30.00
Romania	19.78	19.30	21.30	22.86	23.65	26.75	29.60
Austria	34.90	33.70	33.10	33.03	32.85	32.76	22.90
Denmark	24.90	23.60	25.56	24.52	25.37	26.78	28.71
Uruguay	26.78	25.40	25.40	27.80	27.21	26.53	26.98
Germany	25.80	26.10	22.80	24.57	23.76	24.51	23.10
Belgium	22.90	21.10	21.10	21.09	22.06	21.18	23.05
Serbia/Montenegro	22.10	21.90	21.75	21.22	21.00	20.90	20.06
Australia	16.75	17.70	18.60	18.89	19.03	18.45	18.80
New Zealand	12.10	15.20	16.80	17.30	15.90	15.60	16.60
Netherlands	15.85	16.50	15.65	14.87	14.95	14.15	13.50
Chile	30.40	29.50	27.50	25.76	19.98	15.80	13.10
Cyprus	13.67	13.20	12.70	12.38	13.76	13.61	13.00
Bulgaria	12.57	12.43	12.43	13.04	13.26	14.07	13.85
United Kingdom	10.25	10.29	12.40	12.78	12.95	12.85	12.90
Czech R& Slovakia	11.25	11.80	11.80	11.23	10.94	11.83	12.60
Sweden	12.24	12.78	12.78	13.95	14.56	14.15	12.20
Canada	8.26	8.28	8.28	8.43	8.74	9.34	10.12
South Africa	9.10	9.06	8.90	9.07	9.15	10.65	9.09
United States	7.05	7.12	7.11	7.42	7.91	8.06	8.25
ex Soviets	6.35	6.95	6.47	6.35	6.79	7.05	7.25
Norway	6.85	6.90	6.90	6.95	6.98	7.05	7.25
Ireland	4.35	4.50	5.00	5.45	5.90	6.15	7.00
Finland	4.49	4.49	4.86	5.10	5.27	6.85	5.23
Israel	3.45	3.50	3.20	3.65	4.05	5.15	5.20
Tunisia	2.23	2.20	2.20	2.22	2.64	3.07	2.48
Paraguay	2.00	2.01	2.10	2.26	2.45	2.85	2.26
Poland	1.85	1.95	1.95	2.02	2.26	2.38	2.25
Brazil	1.81	1.83	1.83	1.81	1.83	1.79	1.75
Algeria	1.50	1.53	1.53	1.53	1.62	1.78	1.75
Morocco	1.00	0.99	1.36	1.54	1.67	1.58	1.62
Japan	0.88	0.91	0.86	1.23	1.34	1.59	1.62
Brazil	1.83	1.58	1.59	1.56	1.54	1.53	1.52
Jordan	0.83	0.90	0.90	0.94	1.00	1.11	1.05
Turkey	0.47	0.47	0.57	0.68	0.76	0.82	0.95
Peru	0.47	0.47	0.47	0.52	0.63	0.51	0.72
Mexico	0.18	0.22	0.21	0.22	0.20	0.24	0.22
China	0.05	0.08	0.08	0.09	0.10	0.13	015

(Sourc: Robinson, 1999; Spahni, 1995; Robinson, 1997a(all adapted))

Table A.3 - Summary World Wide Wine Consumption Yearly Averages

(Millions of litres)							
Year	1971-75	1976-80	1981-85	1986-90	1991-1996	1997	%
Europe	22 936	22 605	21 693	17 585	17 337	17 169	74.9
America	4 297	4 955	5 275	4 907	4 522	4 459	19.5
Oceania	157	247	338	375	347	368	1.6
Asia	110	89	147	210	279	276	1.2
Africa	536	539	595	625	651	647	2.8
World	28 036	28 435	28 048	23 702	23 136	22 919	100

Table A.4 - Top Thirty Three Countries *Wine Production*

(Millions of litres)								
Year	1971-75	1976-80	1981-85	1986-90	1991-1995	1996	1997	%
France	6 489	6 157	6 616	6 534	5 432	5 965	5 361	20.27
Italy	6 052	6 133	6 630	6 022	6 122	5 877	5 084	19.22
Spain	3 589	3 332	3 968	3 365	2 675	3 267	3 388	12.81
USA	1 326	1 614	2 031	1 712	1 679	1 864	2 500	9.45
Argentina	1 947	2 171	2 019	1 883	1 558	1 268	1 350	5.10
South Africa	761	849	808	857	952	873	870	3.29
Germany	1 255	1 491	1 590	1 091	1 093	830	84	3.21
Romania	618	683	683	752	550	766	668	2.53
Australia	131	207	301	446	481	678	617	2.34
Portugal	750	769	795	845	715	952	57	2.17
Top Ten	22 918	23 406	25 441	23 507	21 257	22 340	21 259	80.39
Chile	414	528	514	410	332	382	454	1.71
Hungary	347	370	312	406	382	418	447	1.69
China	183	197	245	273	348	430	412	1.55
Serbia/Monteng.	N/A	N/A	N/A	N/A	261	348	402	1.52
Greece	332	378	380	433	366	410	398	1.52
Moldova	N/A	N/A	N/A	N/A	435	359	359	1.36
Brazil	195	294	282	291	309	232	274	1.04
Bulgaria	173	183	183	326	188	200	237	0.89
Croatia	N/A	N/A	N/A	N/A	186	195	226	0.86
Russia	N/A	N/A	N/A	N/A	311	255	210	0.79
Second Ten	1 644	1 950	1 916	2 139	3 118	3 229	3 419	12.93
Austria	283	269	266	285	248	211	180	0.68
Uzbekistan	N/A	N/A	N/A	N/A	134	174	174	0.65
Mexico	110	112	103	118	223	113	152	0.57
Switzerland	101	107	121	128	120	130	104	0.39
Uruguay	68	71	77	79	84	95	102	0.38
Macedonia	N/A	N/A	N/A	N/A	100	101	102	0.00
Slovenia	N/A	N/A	N/A	N/A	82	93	89	0.33
Ukraine	N/A	N/A	N/A	N/A	179	76	70	0.26
Georgia	N/A	N/A	N/A	N/A	105	73	68	0.26
Japan	36	41	57	54	55	67	68	0.26
Third Ten	598	600	624	664	1 330	1 133	1 109	4.16
Slovakia	N/A	N/A	N/A	N/A	76	37	58	0.22
Czech Republic	N/A	N/A	N/A	N/A	50	62	56	0.22
New Zealand	21	32	41	46	44	57	55	0.21
Top Thirty Three	25 181	25 988	28 022	26 356	25 875	26 858	25 952	98.13
World Total	25 486	26 203	28 893	26 756	26 506	27 294	26 442	100.00

(Source Both Tables: Robinson, 1999; Robinson, 1997a; Spahni, 1995; (all adapted))

Table A.5 - New Zealand Wine Institute Category 1-3 Membership by Region 1991 - 2003

Year	1991	1992	1993	1994	1995	1996	1997	1998	1999	2000	2001	2002	2003
District													
Northland	5	5	4	4	4	4	5	6	7	7	7	8	7
Auckland	59	60	55	57	58	65	68	70	80	79	81	82	89
Waikato/ Bay of Plenty	11	9	10	12	11	12	13	14	13	12	12	13	13
Gisborne	6	7	8	7	9	9	8	9	12	13	15	17	16
Hawkes Bay	14	21	21	23	24	31	33	35	41	44	51	53	56
Wellington	13	18	19	21	24	26	31	34	33	35	41	45	44
Nelson	7	8	7	9	11	12	15	15	22	25	28	27	26
Marlborough	13	13	20	28	35	43	47	52	60	64	60	68	74
Canterbury	15	18	23	20	20	24	27	34	39	39	37	38	42
Otago	6	6	7	8	8	11	14	23	26	39	47	46	52
Other Areas	1	1	1	1	0	1	1	1	1	1	1	1	2
Totals-----	150	166	175	190	204	238	262	293	334	358	380	398	421

(Source: New Zealand WineGrowers (adapted), 2003; 2002; Wine Institute of New Zealand Inc.(adapted), 2001; 2000; 1999; 1998; 1997).

Table A.6 - Membership of the New Zealand Wine Institute Inc. by Category 1991 - 2003

Year	1991	1992	1993	1994	1995	1996	1997	1998	1999	2000	2001	2002	2003
Category 1	145	152	161	174	188	221	244	272	313	331	353	369	388
Category 2	11	11	11	13	12	13	14	17	17	23	24	26	30
Category 3	3	3	3	3	4	4	4	4	4	4	3	3	3
Totals ---	159	166	175	190	204	238	262	293	334	358	380	398	421

(Source: New Zealand WineGrowers (adapted), 2003; 2002; Wine Institute of New Zealand Inc.(adapted), 2001; 2000; 1999; 1998; 1997).

Table A.7 - New Zealand Wine Production Sales and Stocks 1993 – 2003

Production											
Year	1993	1994	1995	1996	1997	1998	1999	2000	2001	2002	2003
White	26 062	28 501	41 656	44 690	35 221	45 643	46 984	45 840	39 865	68 436	N/A
Red	3 401	5 108	7 675	8 548	5 337	7 896	6 438	7 056	6 482	10 807	N/A
Sparkling	1 613	5 780	5 180	3 376	4 125	5 734	5 753	6 358	6 158	8 452	N/A
Fortified	1 386	1 720	1 881	691	1 081	1 359	1 012	962	873	1 292	N/A
Total	32 462	41 109	56 392	57 305	45 764	60 632	60 187	60 216	53 378	88 987	55 000
Sales											
White	32 500	25 800	26 500	32 400	35 500	38 100	41 800	46 200	42 200	41 300	N/A
Red	4 100	3 500	4 000	5 500	6 200	6 500	6 200	6 700	6 300	6 700	N/A
Sparkling	5 500	4 500	5 600	6 800	7 500	7 200	5 800	6 500	5 900	6 000	N/A
Fortified	3 500	2 600	2 600	1 900	2 700	1 600	1 200	1 100	1 000	1 200	N/A
Total	45 600	36 400	38 700	46 600	51 900	53 400	55 000	60 500	55 400	55 200	61 500
Losses /Gains	1 394	1 332	1 537	1 241	838	1 437	235	(284)	(510)	(93)	(3 973)
Stocks	55 146	64 776	84 839	96 089	86 053	91 848	96 800	96 800	95 288	129 168	118 695
Stocks : Sales Ratio	1.21	1.62	2.14	2.06	1.66	1.72	1.76	1.60	1.72	2.34	1.93

(Source : New Zealand WineGrowers (adapted), 2003; 2002; Wine Institute of New Zealand Inc. (adapted), 2001; 2000; 1999; 1998; 1997).

Table A.8 - New Zealand Producing Vineyard Area 1995 - 2005 By Grape Variety

* Estimate Year	1995	1996	1997	1998	1999	2000	2001	2002	2003*	2004*	2005*
Müller-Thurgau	885	712	627	537	520	430	377	307	276	259	256
Chardonnay	1 385	1 466	1 618	2 006	2 449	2 858	3 303	3 427	3 513	3 638	3 771
Sauvignon Blanc	936	1 140	1 453	1 678	2 008	2 485	2 843	3 685	4 344	5 122	5 519
Chenin Blanc	145	143	134	139	154	150	127	113	118	118	118
Gewurztraminer	124	93	85	85	103	145	156	178	212	235	247
Riesling	289	276	314	343	432	503	493	529	589	621	628
Muscat Varieties	204	199	184	177	191	188	145	135	139	139	145
Semillon	183	186	190	232	215	235	227	233	244	245	280
Richensteiner	98	72	60	74	65	64	52	47	47	39	39
Pinot Gris	22	21	32	61	90	130	157	232	313	354	379
Cabernet Sauvignon	526	499	507	555	653	671	744	745	766	773	779
Pinot Noir	415	431	495	596	826	1 126	1 491	2 029	2 549	2 988	3 282
Pinotage	66	76	83	64	65	75	81	87	95	109	111
Merlot	282	302	346	405	535	674	912	1 077	1 191	1 363	1 433
Cabernet Franc	80	73	70	88	111	121	148	170	182	198	202
Syrah/Shiraz	14	22	30	40	51	62	87	117	133	153	179
Malbec	11	14	20	25	49	69	101	116	146	163	169
Other and Unknown	445	885	1 162	475	483	211	204	560	622	671	710
Total	6 110	6 610	7 410	7 580	9 000	10 197	11 648	13 787	15 479	17 188	18 247

Table A.9 - New Zealand Producing Vineyard Area By Region (hectares) 1995 -2005

*Estimate Year	1995	1996	1997	1998	1999	2000	2001	2002	2003*	2004*	2005*
Auckland	215	193	191	321	345	393	390	448	470	511	518
Waikato/Bay of Plenty	118	117	90	100	100	119	130	137	140	150	154
Gisborne	1 356	1 165	1 180	1 424	1 447	1 681	1 652	1 774	1 811	1 845	1 872
Hawkes Bay	1 776	1 794	1 744	1 829	2 336	2 443	3 132	3 463	3 752	4 034	4 218
Wellington	189	174	180	212	281	327	380	475	556	625	655
Marlborough	2 123	2 155	2 655	2 747	3 477	4 054	4 561	5 731	6 677	7 679	610
Nelson	70	97	115	161	175	203	324	398	450	508	610
Canterbury	215	213	190	350	363	442	466	482	554	596	619
Otago	46	92	135	210	207	280	322	534	682	810	928
Other and Unknown	2	610	930	226	269	255	291	345	387	430	456
Total ---	6 110	6 610	7 410	7 580	9 000	10 197	11 648	13 787	15 479	17 188	18 247

(Source Both Tables: New Zealand WineGrowers (adapted), 2003; 2002; Wine Institute of New Zealand Inc.(adapted), 2001; 2000; 1999; 1998; 1997; Horner *et al.,* 1997).

Table A.10 - New Zealand Vintages 1993 - 2003 by Grape Variety

(tonnes) Year	1993	1994	1995	1996	1997	1998	1999	2000	2001	2002	2003
Müller-Thurgau	10 228	13 687	15 387	13 838	9 739	10 579	8 941	6 353	4 231	4 806	1 685
Chardonnay	5 301	8 786	12 346	13 870	12 683	18 169	17 823	24 405	17 067	33 883	15 534
Sauvignon Blanc	5 704	5 083	11 015	12 354	11 511	15 136	20 580	15 472	20 826	36 742	28 266
Chenin Blanc	1 401	2 112	2 428	2 609	2 255	2 768	2 099	1 992	1 041	1 322	391
Gewurztraminer	429	732	985	732	510	937	493	594	460	990	529
Riesling	2 204	2 699	2 949	2 877	2 471	3 400	3 462	4 070	4 377	5 038	3 376
Muscat Varieties	3 274	4 181	5 036	5 028	3 753	4 448	3 885	3 487	1 694	2 623	1 242
Semillon	1 125	1 385	2 528	2 342	1 944	2 319	2 593	2 189	1 887	3 053	2 192
Richensteiner	1 055	1 324	1 867	1 813	991	1 693	1 407	1 185	723	1 184	644
Pinot Gris	0	0	0	0	149	257	411	572	747	1 214	836
Other White Vinifera	2 931	3 170	3 854	3 843	2 410	2 313	1 912	939	801	1 253	330
Cabernet Sauvignon	2 091	2 689	4 360	4 169	2 824	4 220	3 723	3 792	2 782	4 375	3 201
Pinot Noir	1 880	2 593	4 480	4 617	3 427	4 489	4 844	6 319	8 015	10 402	9 402
Pinotage	596	832	1 097	949	504	887	444	868	487	863	588
Merlot	711	1 237	2 660	2 857	2 036	3 430	3 252	4 090	2 573	6 502	4 957
Cabernet Franc	309	373	637	611	534	710	618	702	332	827	602
Syrah/Shiraz	0	0	0	0	69	203	192	257	244	397	330
Malbec	0	0	0	0	63	159	214	363	273	731	458
Other Red Vinifera	266	330	354	599	260	328	291	400	375	430	221
All Hybrids	282	278	543	232	173	91	116	20	51	51	38
Total	39 787	51 491	72 526	73 340	58 306	76 536	77 300	78 069	68 986	116 686	74 822
Industry Total	42 621	54 000	74 500	75 300	60 000	78 300	79 700	80 100	71 000	118 700	76 400

Table A.11 - New Zealand Vintages 1993 – 2003 by Regions

(tonnes) Year	1993	1994	1995	1996	1997	1998	1999	2000	2001	2002	2003
Nothland	0	83	64	57	32	108	55	105	84	186	182
Auckland	1 585	1 185	1 874	1 553	1 092	869	1 224	1 363	614	1 526	715
Waikato/Bay of Plenty	449	505	617	761	526	334	552	637	411	932	497
Gisborne	13 169	17 555	22 289	22 330	18 172	23 649	22 133	21 820	12 936	26 587	14 350
Hawkes Bay	8 431	15 116	20 632	21 172	16 533	22 751	19 472	23 886	10 887	25 661	10 834
Wellington	372	501	933	1 072	786	804	607	1 124	1 457	2 022	1 311
Marlborough	15 115	15 851	24 509	24 192	19 585	25 558	29 229	26 212	36 962	54 496	40 537
Nelson	376	366	683	761	838	898	1 383	1 125	2 313	1 785	3 149
Canterbury	234	197	756	1 059	512	960	1 551	788	1 779	1 972	1 422
Otago	56	125	168	376	230	605	1 094	1 009	1 543	1 519	1 825
Other	0	7	1	7	0	0	0	0	0	0	0
Total -	39 787	51 491	72 526	73 340	58 306	76 536	77 300	78 069	68 986	116 686	74 822
Industry Total	42 621	54 000	74 500	75 300	60 000	78 300	79 700	80 100	71 000	118 700	76 400

(Source Both Tables: New Zealand WineGrowers (adapted), 2003; 2002; Wine Institute of New Zealand Inc.(adapted), 2001; 2000; 1999; 1998; 1997; Horner *et al.*, 1997).

Table A.12 - Wine Imports Into New Zealand 1993 - 2003 By Country of Origin

(Millions of Litres) Year	1993	1994	1995	1996	1997	1998	1999	2000	2001	2002	2003
Country											
Australia	17.509	25.839	15.462	13.391	16.201	21.772	20.762	20.655	21.331	25.091	32 363
Spain	0.221	4.189	6.744	3.088	1.123	2. 520	3.344	2.475	1.377	0.195	0.362
France	0.470	0.671	0. 898	0.607	0.898	1.340	0.854	1.012	0.726	1.101	1.241
Italy	0.554	0.618	0.888	1.043	0.915	0.739	0.740	1.886	2.445	3.270	1.105
Chile	0.038	0.063	0.089	1.337	2.232	0.737	1.327	1.085	2.423	4.565	2.594
South Africa	0	0.563	0.670	0.529	0.427	0.354	0.190	0.408	4.124	7.159	6.172
Argentina	0	0	0	0	0.211	0.301	0.167	0.692	0.458	0.080	0.161
Portugal	0.252	0.193	0.245	0.219	0.163	0.151	0.195	0.164	0.201	0.186	0.091
Germany	0. 398	0. 343	0.344	0.191	0.218	0.092	0.091	0.132	0.097	0.105	0.072
Others	0.252	0.216	0.175	0.913	0.021	0.225	0.183	0.047	0.229	0.138	0.212
Total ---	19.694	32.695	25.515	21.318	22.409	28.231	27.853	28.556	33.411	41.890	44.373

Table A.13 - Wine Imports Into New Zealand 1993 - 2003 By Product Type

Millions of Litres) Year	1993	1994	1995	1996	1997	1998	1999	2000	2001	2002	2003
Product Type											
White	12.152	23.858	14.085	9.610	9.696	13.739	11.530	10.881	13.692	18.686	18 803
Red	4.919	5.798	8.396	9.456	10.741	12.563	13.937	15.282	17.439	20.728	21 936
Sparkling	1.871	1.775	1.793	1.389	1.205	1.059	1.484	1.564	1.585	1.729	2 895
Champagne	0.152	0.212	0.330	0.218	0.214	0.265	0.295	0.386	0.197	0.236	0.290
Fortified	0.600	1.052	0.911	0.645	0.553	0.605	0.607	0.443	0.498	0.511	0.449
Total ---	19.694	32.695	25.515	21.318	22.409	28.231	27.853	28.556	33.411	41.890	44.373

(Source Both Tables: New Zealand WineGrowers (adapted), 2003; 2002; Wine Institute of New Zealand Inc.(adapted), 2001; 2000; 1999; 1998; 1997; Statistics New Zealand (adapted), 2002b).

Table A.14 - Wine Imports Into New Zealand 1995 - 2003 Cost per Litre by Product Type

Year	1995	1996	1997	1998	1999	2000	2001	2002	2003
Product Type									
White	$2.05	$2.10	$1.83	$1.96	$2.31	$2.56	$2.62	$2.08	$2.07
Red	$2.70	$2.60	$2.98	$3.30	$4.36	$4.59	$4.79	$4.17	$4.13
Sparkling	$4.95	$5.10	$4.98	$5.69	$6.08	$5.86	$6.82	$6.24	$5.11
Champagne	$32.87	$33.6	$33.80	$34.32	$41.61	$41.88	$44.52	$44.18	$43.05
Fortified	$5.05	$4.86	$5.43	$5.64	$7.24	$8.68	$8.59	$8.83	$8.80
Total	$3.69	$3.43	$3.15	$3.25	$4.06	$4.45	$4.29	$3.61	$3.62

(Source: New Zealand WineGrowers (adapted), 2003; 2002; Wine Institute of New Zealand Inc.(adapted), 2001; 2000; 1999; 1998; 1997; Statistics New Zealand (adapted), 2002b);.Saunders (adapted), 1998).

Table A.15 - Percentage of Major Varieties by Region to June 2003

Region	Chardonnay	Sauvignon Blanc	*Bordeaux	Pinot Noir
Marlborough	25.7%	40.4%	6.6%	11.9%
Hawkes Bay	26.8%	12.8%	35.0%	5.5%
Gisborne	48.6%	3.4%	3.8%	3.0%
Canterbury	24.5%	15.5%	6.3%	24.0%
Otago	27.5%	11.7%	2.0%	37.3%
Wellington	23.9%	12.6%	11.0%	30.2%
Auckland/Northland	19.0%	5.5%	44.4%	7.1%
Nelson	29.5%	23.8%	6.9%	26.4%
Waikato/Bay of Plenty	24.2%	15.8%	21.3%	2.8%

* Cabernet Sauvignon, Merlot, Cabernet Franc

(Source : New Zealand WineGrowers (adapted), 2003).

Table A.16 - UK Average Wine Price per Bottle June 30 1998 and June 30 2003

Country of Origin	1998 GBP	2003 GBP
New Zealand	5.14	5.80
Australia	4.63	5.09
United States	4.48	5.01
France AOC/VDQS	3.55	4.00
South Africa	3.43	3.74

(Source: Watson, personal communication; Wine Institute of New Zealand Inc., 1998).

Table A.17 - Excise Tax on Table Wine per Litre Four Yearly to June 30 2002

Year	$ per Litre Equivalent	$ per Hectare Equivalent	Year	$per Litre Equivalent	$per Hectare Equivalent
1982	.5000	3 750	1994	1.7533	13.150
1986	1.3200	9 900	1998	1.9387	14.540
1990	1.5754	11 816	2002	2.1096	15 822

(Source: New Zealand WineGrowers, (adapted) 2002; Wine Institute of New Zealand Inc. (adapted), 1998 (based on 750 litres per tonne and 10 tonnes per hectare).

Table A.18 - Exports by Style (June 30 year) 1999 - 2003

	1999 litres	1999 $av per litre	2000 litres	2000 $av per litre	2001 litres	2001 $av per litre	2002 litres	2002 $av per litre	2003 litres	2003 $ av per litre
Whites	13 235 673	$7.34	14 843 636	$8.38	15 547 254	$9.66	18 487 185	$10.28	23 094 929	$9.98
Reds	1 908 656	$8.93	2 334 272	$10.93	2 351 074	$13.87	2 618 747	$13.96	2 606 532	$13.56
Sparkling	1 244 713	$8.49	1 760 950	$10.18	1 113 251	$12.85	1 511 608	$12.26	1 641 455	$10.16
Fortified	229 035	$2.30	230 960	$3.23	233 841	$4.19	353 967	$3.34	86 430	$3.48
Total---	16 618 077	$7.54	19 169 818	$8.79	19 245 420	$10.29	22 971 507	$10.73	27 429 346	$10.39

(Source: New Zealand WineGrowers (adapted), 2003; 2002; Wine Institute of New Zealand Inc.(adapted), 2001; 2000; 1999; Statistics New Zealand (adapted), 2002b; 2003).

Table A.19 - Wine Export Destination and Value (June 30 year) For Selected Years

	1989 mills litres	1992 mills litres	1995 mills litres	1998 mills litres	2001 mills litres	2002 mills litres	2003 mills litres	2003 $ 000's Sales Total	2003 $Average Price
U.K.	.988	3.626	5.324	7.997	9.918	11.858	12.258	113.729	$9.27
Australia	.884	.664	.584	2.414	2.373	3.569	4.661	51.621	$11.07
Germany	.002	.034	.041	.414	.377	.156	.220	2.900	$13.17
Japan	.374	.547	.316	.625	.391	.268	.326	4.423	$13.53
Sweden	.150	.881	.561	.267	.056	.045	.034	.498	$11.87
Canada	.098	.164	.297	.415	.612	.713	.988	10.351	$10.47
USA	.055	.114	.145	.979	3.132	3.775	5.758	67.390	$11.70
Netherlands	.001	.013	.083	.474	.903	.801	.525	5.058	$9.62
Ireland	.000	.130	.151	.138	.278	.318	.423	4.141	$9.78
Others	.071	.923	.286	1.429	1.205	1.468	1.920	21.727	$11.87
Total ---	2.623	7.096	7.789	15.152	19.245	22.971	27.113	281.838	
Av Price pr lt	$4.43	$4.90	$5.24	$6.44	$10.29	$10.73	$10.39	$10.39	

(Source: New Zealand WineGrowers (adapted), 2003; 2002; Wine Institute of New Zealand Inc. (adapted), 2001; 2000; 1999; 1998).

Table A.20 - Visitor Arrivals to New Zealand 1985 -2002

Year	Arrivals	Change%	Year	Arrivals	Change%
1985	596 995	15.2	1994	1 213 318	11.7
1986	689 073	15.4	1995	1 343 003	10.7
1987	763 209	10.8	1996	1 441 838	7.4
1988	855 492	12.1	1997	1 497 183	3.8
1989	867 522	1.4	1998	1 484 512	- 0.1
1990	933 431	7.6	1999	1 517 324	2.2
1991	967 062	3.6	2000	1 648 988	8.7
1992	999 714	3.4	2001	1 784 164	8.2
1993	1 086 557	8.7	2002	2 045 657	14.6

(Source: Statistics New Zealand, 2002a; Collier, 1997; Hall and Kearsley, 2001).

Table A.21 - Analysis of New Zealand's Regional Market Share - International Visitors 1990 & 2000

Region	1990				2000			
	Visitor Nights (000's)	%	Stay (Days)	Visitor Numbers	VisitorNights (000's)	%	Stay (Days)	Visitor Numbers
Northland	836	4.6	3.8	220000	1290	4.1	4.9	263317
Auckland	5687	31.7	7.6	748289	10657	34.1	8.8	1211029
Waikato/Coromandel	1149	6.4	5.1	225294	2188	7.0	5.5	397935
Taranaki	226	1.4	4.0	56500	219	0.7	4.1	53533
Bay of Plenty	919	5.1	3.0	306333	1784	5.7	3.0	594770
Manawatu/Wanganui	554	3.2	4.9	113061	796	2.5	5.6	142199
Eastland/Gisborne	167	0.9	5.3	31509	205	0.7	5.7	36067
Hawkes Bay	198	1.2	3.9	50769	522	1.7	4.0	130597
Wellington	1442	8.1	4.5	320444	2175	7.0	4.9	443968
Nelson/Tasman	614	3.5	5.2	118076	1250	4.0	5.6	172057
Marlborough	271	1.6	2.5	108400	387	1.2	2.6	149048
West Coast	453	2.5	2.7	169629	970	3.1	2.9	52272
Canterbury	2622	14.8	5.2	504230	4242	13.6	5.7	744365
Otago	2359	13.1	5.9	399830	3781	12.1	6.0	630233
Southland	344	1.9	2.9	118620	779	2.5	3.1	251398
Total	17841	100.0			31245	100.0		
Average			5.1				5.8	

(Source: Collier,2002; Collier, 1997(all adapted)).

Table A.22 - Analysis of New Zealand's Regional Market Share - Domestic Visitors 1990 & 2000

Region	1990 Visitor Nights (000's)	%	2000 Visitor Nights (000's)	%
Northland	3423	8.3	3733	7.5
Auckland	6574	15.9	6738	13.5
Waikato/Coromandel	5650	13.5	7550	15.0
Taranaki	1018	2.5	1094	2.2
Bay of Plenty	3094	7.5	4537	9.1
Manawatu/Wanganui	2131	5.1	2729	5.5
Eastland/Gisborne	1008	2.4	846	1.7
Hawkes Bay	1774	4.3	2377	4.8
Wellington	3884	9.4	4209	8.4
Nelson/Tasman	1487	3.6	2068	4.1
Marlborough	754	1.8	1061	2.1
West Coast	979	2.4	1085	2.2
Canterbury	5084	12.3	6221	12.5
Otago	3490	8.4	4316	8.7
Southland	1072	2.6	1326	2.7
Total	41422	100.0	49890	100.0

(Source: TRCNZ, 2002; Forsyte Research, 2000; Duncan *et al.*, 1994; NZTB, 1990 (all adapted)).

Table A.23 - Person Nights Spent by Visitors in New Zealand 1990 & 1995 & 2000

	Person Nights in 1990	% of Total Person Nights	Person Nights in 1995	% of Total Person Nights	Person Nights in 2000	% of Total Person Nights
International	17.85m	36.0	27.68m	30.0	31.24m	38.0
Domestic	41.42m	64.0	48.40m	70.0	49.89m	62.0
Total	59.27m	100.0	76.08m	100.0	81.13m	100.0

(Source : Collier, 2002; Collier, 1997).

Table A.24 - Trends in World Tourism Growth

Period	World Tourism Growth	Asia/Pacific Area Growth
1960's	7.5% p.a average	17% p.a. average
1970's	6.7%	12%
1980's	4.6%	7.8%
1990 -1995	4.3%	7.5%
1995 - 2001	3.8%	6.0%
1999/2000	7.4%	12.7%
2000/2001*	-0.6%	5.5%

* Reflects the events of Sept 11 2001

Table A.25 - Forecast of Inbound Tourism by Region

Receiving Regions	International Tourist Arrivals (millions) Actual 2000	Estimate 2001	Forecast 2010	Forecast 2020	Average Annual Growth Rate % 1995 - 2020	Market Share % 2000	2020
Europe	402.7	400.4	527.3	717.0	3.0	57.7	45.9
East Asia/ Pacific	109.1	115.1	195.2	397.2	6.5	16.0	25.4
Americas	128.4	120.8	190.4	282.3	3.9	18.5	18.1
Africa	27.2	28.2	47.0	77.3	5.5	4.0	5.0
Middle East	23.2	22.5	35.9	68.5	7.1	2.9	4.4
South Asia	6.1	5.7	10.6	18.8	6.2	0.9	1.2
Total	696.7	692.7	1 006.4	1 561 .1	4.1	100	100

(Source Both Tables: World Tourism Organisation, 2002; World Tourism Organisation, 2001).

Table A.26 - International Tourist Receipts

Year	International Receipts $B US	Year	International Receipts $B US
1960	6.9	1990	263.4
1970	17.9	1995	406.5
1975	40.7	1999	456.3
1980	105.3	2000	474.4
1985	118.1	2001	472.6

(Source: World Tourism Organisation, 2002; World Tourism Organisation, 2001).

Table A.27 - Departures and Expenditure by Country

Country	Depart. 1999 Thousands	Expend. 2000 $B US	% Market Depart. 1999	%Market Expend. 2000
USA	58 386	64.5	9.0	13.7
Germany	73 400	47.8	11.3	10.0
UK	53 881	36.3	8.3	7.7
Japan	16 358	31.9	2.5	6.6
France	16 709	17.7	2.6	3.6
Italy	18 962	15.7	2.9	3.2
China	N/A	13.1	N/A	2.8
Canada	18 368	12.1	2.8	2.6

(Source: World Tourism Organisation, 2002; World Tourism Organisation, 2001).

Table A.28 - Visitor Arrivals to New Zealand by Purpose of Visit - December Years

	2002 (%)	2001 (%)	2000 (%)	1999 (%)	1998 (%)	1997 (%)
Holiday	51.4	51.8	52.2	51.0	50.0	53.8
VFR	26.1	26.2	26.4	25.6	26.0	23.4
Business	10.9	10.9	11.2	11.9	12.1	11.4
Other	11.6	11.1	10.2	11.5	11.9	11.4
Total	100	100	100	100	100	100

(Source: Statistics New Zealand, 2002c).

Table A.29 - New Zealand Tourism Forecasts

Regional Totals		Visits (000s)	Days (000s)	Spend ($NZm)
Key Measures:	2000	6 050	36 014	4 764
	2002 (f)	6 979	40 792	5 771
	2007 (f)	9 323	52 915	8 071
Avrge Grwth: (annual %)	2002-07	6.4%	5.7%	7.8%
Market Shares (%)	2000	100	100	100
	2002 (f)	100	100	100
	2007 (f)	100	100	100

(Source: Tourism Research Council of New Zealand, 2001).

Table A.30 - Auckland Tourism Forecasts

Auckland Region		Visits (000s)	Days (000s)	Spend ($NZm)
Key Measures:	2000	1 330	12 279	1 487
	2002 (f)	1 540	13 980	1 795
	2007 (f)	2 053	18 236	2 520
Avrge Grwth: (annual %)	2002-07	6.4%	5.8%	7.8%
Market Shares (%)	2000	22.0	34.1	31.2
	2002 (f)	22.1	34.3	31.1
	2007 (f)	22.0	34.5	31.2

(Source: Tourism Research Council of New Zealand, 2001).

Table A.31 - Trade Policy and Regulatory Changes and the Expansion of the New Zealand Wine Industry

Period	Wine Consumption NZ Wine (litres per capita consumpt. at period beginning)	Wine Production (mils of litres at period beginning)	Trade Policy And RegulatoryChanges
1958 -1964	1.74 (1960)	4 (1960)	1958 Higher Taxes on beer and spirits 1960 Restaurants licensed to sell liquor 1961 Taverns licensed
1965-1969	3.08	8	1967 Restrictions on wine imports
1970-1984	4.94	19	1971 Theatres cabarets licensed
1975-1979	7.63	24	1976 BYO restaurants licensed
1980-1984	11.90	43	1981 Import Controls removed 1984 Increase of sales tax on wine
1985-1989	13.10	60	1985 Vine Removal Scheme Announced
1990-1994	11.70	54	1990 - 1994 Further Tariff reductions 1990 Supermarkets start selling wine 1992 Wineries licensed to sell wine on own premises
1995-1997	8.70	56	1995- 1997 Further tariff reductions 1996 Customs and Excise Act
1998-2002	10.10	60	1998- 2000 Further tarrif reductions 1999 Sunday liquor sales; age reduced; supermarket beer sales allowed

(Source: New Zealand Tariff Schedules, Years 1960 –2000 (adapted); New Zealand WineGrowers (adapted), 2002).

Table A.32 - Changes in Tariffs on Wine Imports 1986 - 2002

Date (July 1)	Specific Tariff (cents/litre)	Ad Valorem (tariff %)	Imports (mils of litres)	Imports % of Total Consumption
1986	68c	20.00	3.732	6.5
1987	51c	21.25	4.376	9.2
1988	34c	22.50	6.798	10.8
1989	17c	23.75	7.988	13.6
1990		25.00	11.397	13.8
1991		22.00	8.418	20.4
1992		19.50	19.694	19.6
1993		19.00	32.695	45.2
1994		17.00	25.515	49.6
1995		15.00	21.318	34.4
1996		13.00	22.409	31.5
1998		11.00	28.231	40.6
1999		9.00	27.853	39.3
2000		7.00	28.556	40.8
2001		5.00	33.411	47.9
2002		3.00	41.890	56.4
2003				

(Source: New Zealand Tariff Schedules, Years 1986 -2003; New Zealand WineGrowers, 2003; 2002; Wine Institute of New Zealand, 2001; 2000;1999; 1998; 1997).

Table A.33 - Wine Tourism Facilities by Region 1995

Wine Region	Wineries Number	with Cellar Door Sales Number	%	with Restaurants/Cafes/Bars Number	%
Northland	4	2	50	1	25
Auckland/Northland	52	28	54	4	8
Waikato/Bay of Plenty	10	6	60	3	30
Gisborne	9	6	67	1	11
Hawkes Bay	27	19	70	4	15
Wellington	19	14	74	1	5
Marlborough	36	18	50	4	11
Nelson	9	7	78	3	33
Canterbury	20	11	55	7	35
Otago	7	5	71	1	14
Other	0	0	0	0	0

(Source: Deves, (adapted) 1995).

Table A.34 - Wine Tourism Facilities by Region 2003

Wine Region	Wineries Number	with Cellar Door Sales Number	%	with Restaurants/Cafes/Bars Number	%
Northland	6	4	66	4	66
Auckland	66	50	75	27	31
Waikato/Bay of Plenty	14	10	71	4	29
Gisborne	13	11	84	5	38
Hawkes Bay	60	47	78	16	26
Wellington	35	28	80	11	31
Marlborough	71	57	80	20	28
Nelson	23	18	78	12	52
Canterbury	37	30	81	13	35
Otago	46	37	80	20	43

(Source: Campbell, and Jacobs, 2003 (derived)).

Table A.35 - Destinational Wine Tourism Facilities by Wine Region/Sub-Region 2003

Wine Region Sub-region	Wine Festivals	Wine Tour Operators	Wine Trails /Cycle Ways	Regional Wine Guides/Maps	Lonely Planet Entry
Northland	2	1	0	0	1
Auckland	2				
Matakana/Mahurangi	1	3	1	1	1
Henderson /Henderson Vlly	2	2	1	0	2
Kumeu/Huapai/Waimauku	1	2	1	1	1
South Auckland	0	0	0	0	1
Waiheke Island	2	2	2	1	1
Waikato/Bay of Plenty					
Waikato	1	1	0	0	0
Bay of Plenty	1	1	0	0	1
Gisborne	2	5	1	1	1
Hawkes Bay	5	6	4	3	1
Wellington					
Wairarapa	2	2	1	0	1
Martinborough	1	2	3	2	1
Te Horo	0	0	0	0	0
Marlborough	1	4	6	3	1
Nelson	1	2	1	1	1
Canterbury	3				
Canterbury	1	3	1	1	2
Waipara	1	2	1	1	1
Otago	2	3	4	2	2
Other	2	0	0	0	0
Totals	31	41	27	16	19

(Source: Campbell, and Jacobs, 2003; Lonely Planet Guide Series, 2000 (derived)).

Table A.36 - New Zealand Food and Wine Festivals 2002/2003

Wine Region	Month
Northland	
Bay of Islands Wine and Food Festival	September
Federweiser (Vintage Festival) (Kerikeri)	April
Auckland	
Wine Waitakere	October
Kumeu Food and Wine Festival	November
St Heliers Food and Wine Festival	January
ANZ Devenport Wine and Food Festival	February
Vintage Alfresco	February
Waiheke Island Wine Festival	February
Heron's Flight Harvest Festival (Matakana)	April
Montana Waiheke Island of Jazz Festival	April
Waikato/Bay of Plenty	
Tauranga Boutique Food and Wine Festival	March
The Great New Zealand Wine and Food Festival Hamilton	April
Gisborne	
McCullochs Gisborne Wine and Food Festival	October
Taste Gisborne Festival	January
Hawkes Bay	
Taste the Regions Wines	November
A Month of Wine and Roses	November
Harvest Hawkes Bay Festival of Wine and Food Events	February
Church Road Jazz Concert (Church Road Winery)	February
Mission Estate Winery Concert	February
Wairarapa	
Toast Martinborough Festival	November
Wairarapa Wine and Food Festival	February
Shakespear in the Vineyard	February
Marlborough	
BMW Wine Marlborough Festival	February
Nelson	
Hooked on Seafood	March
Canterbury/Waipara	
Seafest Kaikoura	October
Akaroa French Festival	January
Canterbury Wine and Food Festival	February
Waipara Wine and Food Celebration	March
Savour New Zealand	May
Central Otago	
Central Otago Wine and Food Festival	January
Taste Otago	February
Other Non-Wine Regions	
Taranaki Wine And Food Festival	February
Hokitika Wild Foods Festival	March

(Source 1: Campbell and Jacobs, 2003 (derived)).
(Source 2: Cooper, 2002 (derived)).

Table A.37 - Tourism and Visitor Facilities at Australian Wineries in 1995

State	NSW		Vic		SA		ACT		Qld		WA		Tas	
Tourist Visitor Facility	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%
Total number of wineries	162	100	274	100	211	100	16	100	29	100	149	100	50	100
Total cellar door	142	87.7	227	82.9	170	80.6	13	81.3	29	100	117	78.5	40	80.0
Cellar door open weekends or by arrangement only	32	22.5	98	43.8	20	11.8	8	61.5	5	17.2	33	28.2	18	45.0
BBQ	30	18.5	39	14.2	13	6.2	2	12.5	3	10.3	11	7.4	1	2.0
Tours	9	5.6	12	4.4	5	2.4	0	0	3	10.3	6	4.0	0	0
Function Facilities	4	2.5	9	3.3	9	4.3	2	12.5	1	3.5	7	4.7	1	2.0
Festivals	2	1.2	1	0.3	0	0	0	0	0	0	3	2.0	0	0
Childrens facilities (playground etc.)	4	4.3	8	2.9	6	2.8	0	0	1	3.5	4	2.7	0	0
Total restaurant/catering available weekends or by arrangement only	8	4.9	17	6.2	4	1.9	1	6.3	2	6.9	4	2.7	1	2.0
Accomodation	8	4.9	9	3.3	10	4.7	1	6.3	1	3.5	3	2.0	8	16.0
Picnic	12	7.4	31	11.3	19	9.0	3	18.8	3	10.3	9	6.0	2	4.0
Historic Building/museum	14	8.6	25	9.1	35	16.6	1	6.3	0	0	5	3.4	4	8.0
Resort	1	0.6	1	0.4	0	0	0	0	0	0	0	0	0	0
Conference facilities	2	1.2	4	1.2	6	2.8	1	6.3	0	0	0	0	1	2.0
Craft/produce/gallery	11	6.8	2	0.7	18	8.5	1	6.3	0	0	13	8.7	0	0
Souvenirs	3	1.9	0	0	1	0.5	0	0	1	3.5	0	0	0	0
Other facilities (golf cricket, fishing etc.)	2	1.2	11	4.0	2	1.0	0	0	0	0	0	0	0	0
Visitor Centre	0	0	2	0.7	0	0	0	0	0	0	0	0	0	0
Other wines (non-grape)	4	2.5	6	2.2	5	2.4	1	6.3	3	10.3	4	2.7	1	2.0
Disabled facilities	0	0	1	0.4	1	0.5	0	0	0	0	1	0.7	0	0

(Source: Hall and Macionis, 1998).

Table A.38 - World Top Ten Wine Producing and Consuming Countries of 1997

Top Producers		Top Consumers	
France	20.3%	France	15.6%
Italy	19.2%	Italy	15.1%
Spain	12.8%	USA	15.1%
USA	9.5%	Germany	8.3%
Argentina	5.1%	Spain	6.5%
South Africa	3.3%	UK	3.6%
Germany	3.2%	Russia	2.6%
Romania	2.5%	Romania	2.6%
Australia	2.3%	Portugal	2.5%
Portugal	2.2%	Argentina	2.2%

(Source: Office Internationale De La Vigne et Du Vin (DIV), 1997).

Table A.39 - World Top Ten Wine Exporting and Importing Countries of 1997

Top Exporters		Top Importers	
France	24.0%	Germany	20.8%
Italy	23.92%	UK	14.3%
Spain	14.2%	France	10.2%
Portugal	3.8%	USA	8.1%
USA	3.5%	Russia	5.2%
Chile	3.4%	Netherlands	3.4%
Germany	3.3%	Switzerland	3.3%
Moldova	3.1%	Canada	3.2%
Bulgaria	2.8%	Denmark	3.0%
Australia	2.7%	Japan	2.3%

(Source: Office Internationale De La Vigne et Du Vin (DIV), 1997).

Appendix B - Ampelography : The Science of Grape - bearing Vines

B.0. Subgenera and Main Species of the Genus Vitis

Vitis

* Species cultivated for winemaking as either bud wood or as root stock

Euvitis

Muscadinia

Eurasian	North American	North American
amurensis	*** aestivalis**	munsoniana
armata	argentifolia	popenoei
betulifolia	arizonica	*** rotundifolia**
coignetiae	*** berlandieri**	
Davidii	baileyana	
embergeri	californica	
ficifolia	candicans	
flexuosa	Champini	
lanata	cinerea	
Pagnucii	cordifolia	
pedicellata	Doaniana	
pentagona	gigas	
Piasezkii	Girdiana	
reticulata	helleri	
Romanetia	illex	
Retordi	indica (cariboea)	
Thunbergii	*** labrusca**	
*** vinifera**	*** Lincecumii**	
Wilsonae	*** Longii**	
	monticola	
	novae-angliae	
	palmata	
	riparia	
	rufotomentosa	
	rupestris	
	Shuttleworthii	
	Smalliani	
	Simpsoni	
	sola	
	Treleasei	
	vulpina	

B.1. Sub-subgenera and Main Species of the Genus Vitis

Species Variety/Cultivar *** Classified as classic by Robinson (1986)**

	Red		White	
Vitis vinifera	*** Cabernet Sauvignon**	Gamay	*** Chardonnay**	Muller Thurgau
	*** Merlot**	Grenache	*** Chenin Blanc**	Muscadet
	*** Pinot Noir**	Nebbiolo	*** Riesling**	Muscat
	*** Syrah/Shiraz**	Pinot Gris	*** Semillon**	Palomino
	Barbera	Sangiovese	*** Sauvignon Blanc**	Silvaner
	Cabernet Franc	Tempranillo	Aligote	Trebbiano
	Carignan	Zinfandel	Gewurztraminer	Viognier
	Cinsaut		Pinot Blanc	Welschriesling
			Malvasia	
Vitis labrusca	Concord			
	Catawba			
Vitis rotundifolia			Scuppernong	

(Source: derived from Vine (1997), Unwin (1991), Robinson (1986), de Blij (1983) and Winkler (1962)).

Appendix C – Wine Grape Varieties

Variety (ha planted rank) Variety Characteristics

C.0 White Wine Varieties

C.0.0 Chardonnay (2)

Favoured in Burgundy (Cote d'Or), Chablis, Meursault and Montrachet. Currently a fashionable grape (California, Australia, New Zealand) used for producing dry white wines and as a base of good sparkling wine. A sparse cropper generally producing berries of variable size. The Mendoza clone together with UCD6 (clone 6 - often used in sparkling wines) as well as UCD4/UCD5 (clone 4/5 - from California) and UCD15 (clone 15 – moderate cropper). Typically Chardonnay wines are full of fruit flavours and may be made in either a wooded or unwooded style often with crisp acidity and a delightful aroma. Within New Zealand, Gisborne, Hawkes Bay and Marlborough are regarded as the most favoured locations for this variety.

C.0.1 Chasselas (19)

A low cropper, producing a delicate white, low in both alcohol and acidity.

C.0.2 Chenin Blanc (10)

Although regarded as a variety to produce memorable wines in the Loire - in New Zealand it is often blended with Müller-Thurgau as cask wine to add fruity vigour to the base – a blandish sweet wine. This variety prefers a coldish, sunny climate and its acidity level is often a problem. Chenin Blanc wine quality varies widely although acidity can be a problem. Rich ripe flavours are possible. This variety in New Zealand promises great future prospects after the viticultural challenge has been met by growers.

C.0.3 Gewurztraminer (11)

Especially associated with Alsace, this spicy wine has recently been increasing in popularity in spite of a reduction in national plantings. This temperamental vine's success is almost totally dependent upon prevailing climatic conditions during the growing season. This spicy aromatic wine complements Chinese, Malay or Thai food.

C.0.4 Müller-Thurgau (3)

Combination of two German grapes (Riesling and Sylvaner). An extremely heavy bearing vine, invariably producing a sweet fruity wine, Müller-Thurgau is normally used in casks as a base wine. Plantings in New Zealand have been reduced over the years with imported bulk wines being used instead.

C.0.5 Muscat Varieties (9)

Sweet with a musky aroma the wine produced is often blended with a base wine such as Müller-Thurgau in order to enhance the fruitiness of the resulting wine. The temperatures in New Zealand are probably too cool to produce the strength of flavour common in warmer countries. Dr Hogg is the most widely planted of the Muscat varieties in New Zealand.

C.0.6 Palomino (14)

Used extensively in Spain for the making of sherry, it was originally used in New Zealand for the same purpose. Following the vine-pull scheme of the 1980's the plantings have decreased dramatically reflecting the increased demand for drier varietal wines such as chardonnay.

C.0.7 Pinot Gris (16)

This erratic cropping variety although once rare in New Zealand vineyards tends to favour the colder regions of the country. Plantings have been increasing in recent years. The wine produced, although normally unwooded, is both dry and full-flavoured being a useful alternative to chardonnay. Within New Zealand, Central Otago and Marlborough, are regarded as the most favoured locations for this variety.

C.0.8 Riesling (7)

Originating in Austria but now Germany's most famous grape variety. Since adopted by New Zealand, Australia, California, Alsace and Central Europe. Tends to grow best in cooler areas with longish dry ripening seasons. The wine produced varies considerably in style from sweet to dry and the flavours strong but variable. The "Noble" form (infected with *Botrytis cinera)* can dramatically alter the aroma and flavour. Within New Zealand, Canterbury is regarded as the most favoured location for this variety.

C.0.9 Sauvignon Blanc (1)

When grown in New Zealand this high yielding variety tastes quite differently than when grown in any other part of the world. The climate of Marlborough produces superb results for this variety. The two distinct styles made from this grape, Sauvignon Blanc and Fume Blanc are produced in different ways. The former is bottled directly from stainless steel tanks and emphasises the grapes fruity, tangy characteristics, while the latter which requires maturing in oak, increases the complexity and breadth of the wine's flavour. Within New Zealand, Marlborough and Central Otago are regarded as the most favoured locations for this variety.

C.0.10 Semillon (8)

A classic Sauterne grape. Semillon, a vigorous producer, is usually blended in New Zealand with Sauvignon Blanc and less frequently with Chardonnay. Unblended, the wine produced by Semillon is extremely herbaceous in character and develops markedly with age. Newer virus free vines, recently introduced into New Zealand, together with better vineyard management practices have reduced the unripe herbaceous characteristics of earlier Semillon clones.

C.1 Red Wine Varieties

C.1.0 Cabernet Franc (12)

One of the classic Bordeaux varieties Cabernet Franc is best suited to warmer climates. This variety, with an appetising aroma, and low in tannin can be used to make a pleasant varietal wine, but more often it is blended with other varieties such as Cabernet Sauvignon/Merlot.

C.1.1 Cabernet Sauvignon (6)

This grape is the classic dry red variety of Medoc and Bordeaux. An indifferent cropper, preferring warmer regions, the grape is the last in the season to ripen. It produces wine of tremendous sturdy character which is often slow to mature (three to five years) and soften. Within New Zealand, the Auckland region (especially Waiheke) and Hawkes Bay, are regarded as the most favoured locations for this variety.

C.1.2 Malbec (17)

Best suited to a warmer climate. Blessed with a brilliant colour and spicy, rich flavour the wine produced is often blended to claret-style reds to accentuate their aroma and taste.

C.1.3 Merlot (5)

Originally used as a blending wine mainly with Cabernet Sauvignon, Merlot more recently has been produced as a premium varietal in its own right. With a strong fruity flavour Merlot requires aging for only two years. Within New Zealand, the Auckland region (especially Waiheke), Hawkes Bay and Marlborough, are regarded as the most favoured locations for this variety.

C.1.4 Pinotage (13)

Originally derived in South Africa as a cross between Pinot Noir and Hermitage (originally Cinsaut from France). Grown mainly in South Africa and New Zealand Pinotage has a pleasant peppery, berry flavour with a light tannin grip and smooth finish.

C.1.5 Pinot Meunier (18)

There are only tiny plantings in New Zealand. The vines are good croppers and in normal seasons can be relied upon to produce a drinkable wine.

C.1.6 Pinot Noir (4)

A small cropper Pinot Noir is the classic grape of Burgundy, giving wines of fine perfume fruity palate and style but with a soft finish. The vine prefers a cool climate. Pinot Noir is often blended with other wines. This is the principal variety used in the best champagne and other bottle fermented wines. Pinot Noir is often regarded as the most difficult wine to make successfully outside of Europe because of its temperamental requirements of soil and climate. A period of five years or longer in the bottle is preferable allowing the wine to gain in complexity. Within New Zealand, Canterbury Martinborough, Marlborough and Central Otago are regarded as the most favoured locations for this variety.

C.1.7 Syrah (15)

Known as Syrah in the upper Rhone Valley of France and as Shiraz or Hermitage in Australia (where there are large plantings) the variety prefers a warm dry climate. Possessed of a spicy, rich peppery aroma the variety in New Zealand ripens even later than Cabernet Sauvignon. There is a new interest in New Zealand in this variety, which in early years had larger plantings than at present. Within New Zealand, Hawkes Bay is regarded as the most favoured location for this variety.

(Source 1: *Wine in New Zealand,* (Courtney *et al.*, 2003).
(Source 2: *Wine Atlas of New Zealand*, (Cooper, 2002)).
(Source 3: Annual Report of the Wine Institute of New Zealand Inc. (Wine Institute of New Zealand Inc., 2003)).
(Source 4: *Viticulture: Grape Varieties.* (MAF Bulletin 354, 1996)).

Appendix D - Wineries in the Auckland Region

Name	Address
D.0 Henderson /Henderson Valley - Sub Region	
01. Artisan Wines	225 Henderson Valley Rd., Henderson, Auckland
02. Babich Wines	Babich Rd., Henderson, Auckland
03. Buljan's Wines	122 Hobsonville Rd., Hobsonville, Auckland
04. Collard Brothers	303 Lincoln Rd., Henderson, Auckland
05. Delgat's Wine Estate	172 Hepburn Rd., Henderson, Auckland
06. Fino Valley Wines	Henderson Valley Rd., Henderson, Auckland
07. Fuller's Vineyard	86 Candia Rd., Henderson, Auckland
08. Landmark Estate	132 Bruce McLaren Rd., Henderson, Auckland
09. Lincoln Vineyards	130 Lincoln Rd., Henderson, Auckland
10. Mayfair Wine Cellars	192 Sturges Rd., Henderson, Auckland
11. Mazuran's Vineyards	255 Lincoln Rd., Henderson, Auckland
12. Misty Valley Wines	Henderson Valley Rd., Henderson, Auckland
13. Mother's Cellar	329 Lincoln Rd., Henderson, Auckland
14. Odyssey Wines	50 Keeling St., Henderson, Auckland
15. Pacific Vineyards	90 McLeod Rd., Henderson, Auckland
16. Pleasant Valley Wines	Henderson Valley Rd., Henderson, Auckland
17. Seibel Wines	113 Sturges Rd., Henderson, Auckland
18. St. Jerome Winery	Metcalfe Rd., Henderson, Auckland
19. Windy Hill Winery	92 Simpson Rd., Henderson, Auckland
D.1 Kumeu /Huapai /Waimauku - Sub Region	
20. Coopers Creek	Main Highway 16, Kumeu
21. Harrier Rise Vineyard	748 Waitakere Rd., Kumeu
22. Kerr Farm Vineyard	Dysart Lane, Kumeu
23. Kumeu River Wines	Main Highway 16, Kumeu
24. Matua Valley Wines	Waikaukau Valley Rd., Kumeu
25. Nobilo Vintners	Station Rd., Huapai
26. Rabbit Ridge	407 Taylor Rd., Waimauku
27. Soljans Wines	State Highway 16, Kumeu
28. Waimarie Wines	Muriwai Valley Rd., Waimauku

29. West Brook Winery — 215 Ararimu Valley Rd., Waimauku
30. Woodhouse Wines — Trigg Rd, R.D. 1, Kumeu

D.2 Matakana/Mahurangi - Sub Region

31. Ascension Vineyard	480 Matakana Rd., Matakana
32. Brick Bay	Kauri Drive, Sandspit
33. Herons' Flight	49 Sharp Rd., Matakana
34. HyperionWines	188 Tongue Farm Rd., Matakana
35. Mahurangi Estate	Hamilton Rd., Warkworth
36. Matakana Estate	568 Matakana Rd., Matakana
37. Providence Vineyard	Cnr Omaha Flats & Takatu Rd., Matakana
38. Ransom Wines	46 Valerie Close, Warkworth
39. Te Aria Point Estate	Wood Rd., Pakari
40. The Antipodean	Tongue Farm Rd., Matakana

D.3 South Auckland - Sub Region

41. Arahua Vineyard	146 Ness Valley Rd., Clevedon, Auckland
42. Inverness Estate	Ness Valley Rd., Cleveland, Auckland
43. Montana Wines	171 Pilkington Rd., Glen Innes, Auckland
44. Puriri Hills Vineyard	398 North Rd., Cleveland, Auckland
45. St. Nesbit Winery	Hingaia Rd., Papakura, Auckland
46. Villa Maria Estate	Kirkbridge Rd., Mangere, Auckland
47. Vin Alto Winery	424 Creightons Rd., Clevedon, Auckland
48. Waiuku River Wines	455 Glenbrook Beach Rd., RD1, Waiuku

D.4 Waiheke Island - Sub Region

49. Cable Bay Winery	12 Nick Johnson Rd., Oneroa, Waiheke
50. Fenton Estate	56 Korora Rd., Oneroa, Waiheke
51. Ferryman Vineyard	206 Church Bay Rd., Oneroa, Waiheke
52. Foreman's Vineyard	74 Onetangi Rd., Onetangi, Waiheke
53. Goldwater Estate	18 Causeway Rd., Putiki Bay, Waiheke
54. Kennedy Point	44 Donald Bruce Rd., Surfdale, Waiheke
55. Mellars, John	Okupu Bay, Great Barrier Island
56. Miro Vineyard	Brown's Rd., Onetangi, Waiheke
57. Mudbrick Vineyard	Church Bay Rd., Oneroa, Waiheke

58. Obsidan Vineyard	Te Makiri Rd., Onetangi, Waiheke
59. Onetangi Rd. Vineyard	82 Onetangi Rd., Onetangi, Waiheke
60. Passage Rock Vineyard	438 Orapiu Rd., Te Matuku Bay, Waiheke
61. Peninsula Estate	52A Korora Rd., Oneroa, Waiheke
62. Putiki Bay Vineyard	84 Vintage Lane, Te Whau Point, Waiheke
63. Stony Batter Estate	Stony Batter Rd., Waiheke
64. Stonyridge Vineyard	80 Onetangi Rd., Ostend, Waiheke
65. Te Motu Vineyard	76 Onetangi Rd., Onetangi, Waiheke
66. Te Whau Vineyard	218 Te Whau Drive, Rocky Bay, Waiheke

(Source 1: *Annual Report of New Zealand WineGrowers* (New Zealand WineGrowers, 2003)).
(Source 2: *Cuisine Wine Country*, (Campbell and Jacobs, 2003)).
(Source 3: *Wine Atlas of New Zealand*, (Cooper, 2002)).

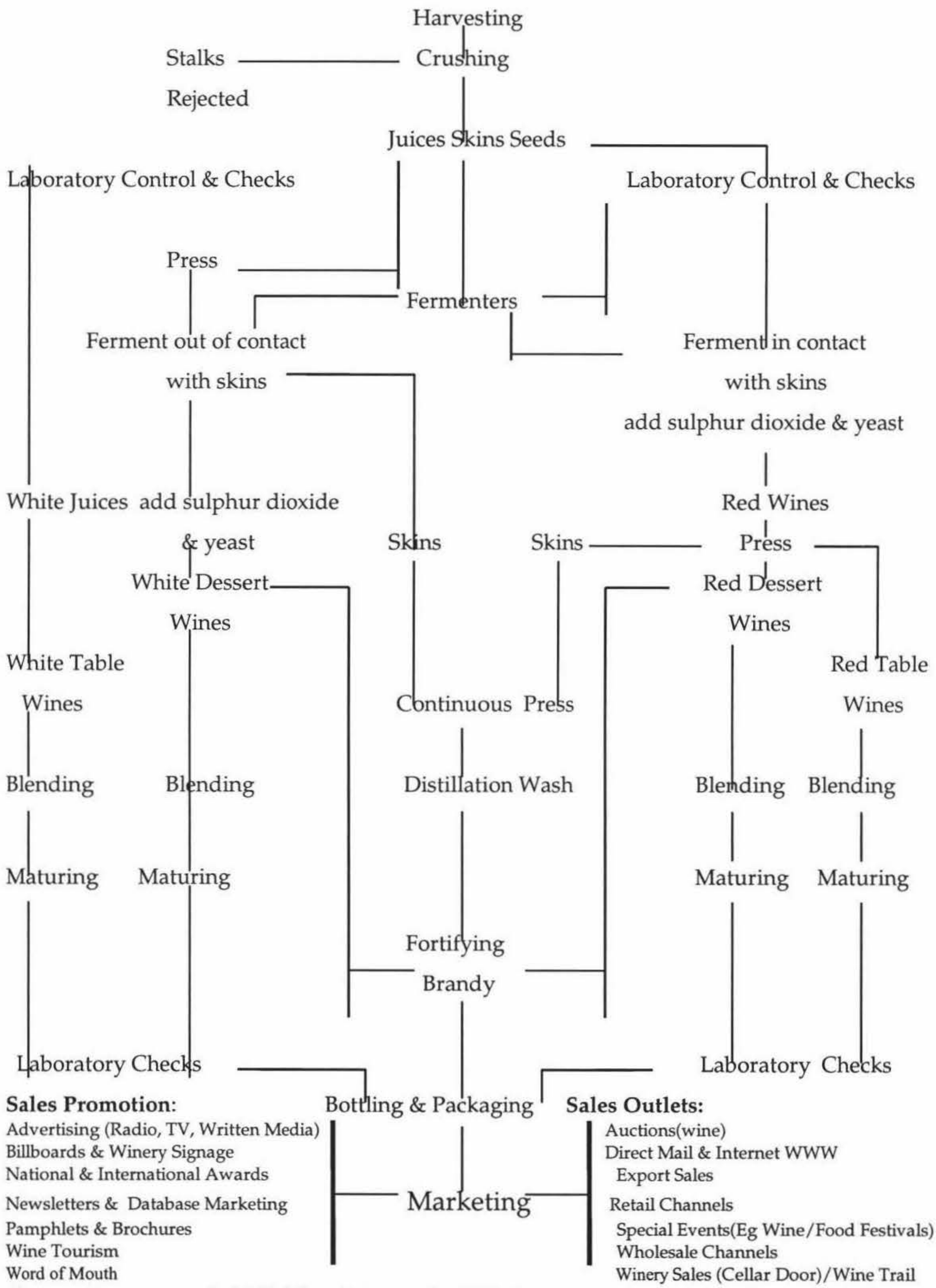
Appendix E - Viticultural, Winemaking and Marketing Functions on a Typical Vineyard Property

A. Viticultural Functions

Month	Main Functions	Pest & Weed Control	Repairs/ Maint.	Vine State
May		Weed/Sheep	Trellis Repairs Drainage	Leaf Fall
Jun	Pruning		Trellis Repairs Vine Replacements	Dormant
Jul		Vines /Spray		
Aug		Weed /Spray	Fertiliser Applied	
Sep		Vines/Spray		Bud Burst
Oct				Cane Growth
Nov	Tucking(Wire 1)			
Dec	Tucking(Wire 2)			Flowering Cane Growth
Jan	Foliage Trimming			Cap Drop Berry Formation Cane Growth
Feb	Leaf Plucking/ Bird Control/	Vine/ Spray Only after rain		Verasion Bunch Tightening Brix ++
Mar	Harvesting/ Bird Control			Brix ++ Harvest
Apr	Harvesting/ Bird Control		Drainage Trellis Repairs	Brix ++ Harvest

(Source: W.N.Winter -Personal Experience; Courtney *et al.*, 2003).

B. Winemaking and Marketing Functions



(Source: Courtney *et al.*, 2003; Vine, R.P. *et al.*, 1997; Boulton *et al.*, 1996; Rankine, 1989 (all adapted)).

Appendix F - Historical Time-lines of Governmental Legislation, Regulations, Submissions and Commissions of Enquiry

F.0 Historical Time-line of Governmental Legislation and Commissions of Enquiry Related to Liquor Licencing

1877 - The original Licensing Act of 1877 was devoid of any specific wine-making provisions but recognised the need for liquor to be distinguished from other goods available for purchase by the public.

1879 - An amendment to the original Licensing Act allowed, for the first time, the sale of wine in wineries and wine shops.

1881 - Marking the first "victory" of the temperance groups the Licensing Act of 1881 severely restricted the conditions under which liquor licenses were granted. It also provided for liquor licensing districts as well as the concept of "no-license" districts, voting for which was to occur at each general election thereafter.

1908 - Distillation Act provided for the distillation of fortified wines and spirits.

1914 - Wine-making licensing was introduced in the Licensing Amendment Act of 1914. This provided that wine should not be made without a license, that holders of wine-making licenses should be of good character, that containers of two gallons (nine litres) only or more could be sold by wine-makers directly to the public and that the name and address of the wine-maker should be displayed on the container.

1917 - In 1917 the Sale of Liquor Restriction Act temporarily restricted the hours of sale from licensed premises to between 9 AM and 6 PM. This restriction became permanent in 1919. Then followed a general paucity of wine related legislation for almost forty years as the lobbying efforts of the prohibitionists continued, but at a diminishing rate.

1944 - Trust control of liquor licensing originated in the prohibition movement around the turn of the twentieth century. The aim was to eliminate private profit from the sale of intoxicants. The Invercargill Trust Act of 1944 was the first legislative move in this direction and eventually three different types of Licensing Trusts developed in New Zealand. These operated as follows:

- Established in former no-license areas which became known as "District Trusts" with full control of all liquor trading.
- Those operating in existing licensing districts which became known as "Local Trusts" and were restricted to hotels.
- "Suburban Trusts" were created to meet the requirements of no-license districts in the suburbs of larger cities.

The original objectives of "Licensing Trusts" were to give some form of control to individual communities and to ensure that profits made were utilised locally. Seen by some as current day anomalies, Licensing Trusts are often popular amongst local residents even today. In recent referenda in West Auckland both the Portage Licensing Trust and the Waitakere Licensing Trust convincingly retained their monopolies in spite of fierce opposition from the two major supermarket chains operating in their districts (New Zealand Herald, 2003a).

1946 - The Royal Commission on Liquor Licensing of 1946 reviewed all aspects of liquor production, importation and sales within New Zealand. Many of the recommendations were ignored by the parliamentarians of the time who were still concerned with a possible electoral backlash from the so-called "wowser" vote.

1948 - In 1948 The Wine Resellers Licensing Act created a new class of license called "wine resellers licenses". This resulted in a whole new distribution system as it enabled wine-makers and others to establish retail branches throughout the country for the first time.

1953 - The 1914 Act was amended by the Licensing Amendment Act, No 2 of 1953 which served to consolidate the original Act and its subsequent amendments.

1955 - In 1955 the Licensing Amendment Act No 3 contributed greatly to the industry by reducing the minimum quantities of wine that could be sold by both wine-makers and wine-resellers from two gallons (nine litres) to one quart (one and one-seventh litres) for table wines and to half a gallon (two and two-sevenths litres) for fortified wines.

1960 - Restaurant licenses were introduced in the Liquor Licensing Amendment Act No 4 of 1960.

1962 - The Licensing Act of 1914 and its various amendments were replaced by the Sale of Liquor Act 1962.

1971 - The Distillation Act of 1971 which consolidated the Distillation Act of 1908 contained provisions for the making and use of fortifying wine and spirits. Wine or musts can be fortified to a strength not exceeding 22.8% by volume.

1974 - Submissions made to and recommendations made by the Royal Commission on Liquor of 1974 included various proposals related to an easing of liquor controls to better reflect a changing New Zealand life-style. Again these were largely ignored by politicians, nervous of retaliation by voters in the forthcoming general election of 1975.

1976 - "Bring your own" (BYO) permits formalised wine consumption in unlicensed restaurants in 1976 .

1981 - The Winemakers Act of 1981 removed legislative authority for wine-making from the Sale of Liquor Act, which was basically designed to control the sale and not the manufacture of alcoholic beverages. During these years the sale and distribution of liquor in New Zealand, although lagging behind that of other comparative countries, had been progressively liberalised.

1989 - The Sale of Liquor Act 1989, the current operative act, replaced the Sale of Liquor Act 1962. By allowing the sale of wine in supermarkets the 1989 Act revolutionised both its distribution as well as its general availability. Supermarkets accounted in 1998 for almost forty per cent of retail wine sales (New Zealand Herald, 1998c). Cellar door sales are covered by the Sale of Liquor Act, 1989 and its subsequent amendments.

1992 - The 1992 Sale of Liquor Amendment Act allowed for the licensing of wineries.

1994 - Worldwide, most governments have at various times grappled with the question of an appropriate alcohol policy. The health and social problems caused by excessive alcohol to a small minority of the population has to be balanced against the harmless enjoyment it affords to the majority together with the need to raise additional revenue by way of taxation on its consumption (Edwards *et al,* 1995). This can best be illustrated by the furor created in New Zealand by the 1994 Public Health Commission Alcohol Policy Advice Paper. This led to the rapid dis-establishment of the Commission within two years of its inception. The Commission, originally set up to advise Government on all aspects of public health, unexpectedly published an Alcohol Policy Paper which recommended governmental policies designed to considerably reduce the consumption of alcohol by the population. At the time the beneficial aspects to health of moderate alcohol consumption were slowly being realised. Additionally the Government as a result of pressure from powerful industry groups and fearful of the fiscal effects of greatly reduced revenues from excise duty ignored the recommendations and quickly sought to dis-establish the Health Commission (Hutt *et al.*, 1998).

1999 - Further liberalisation of liquor availability, with regard to both customer age and outlets, were made in the Sale of Liquor Amendment Act of 1999. For the first time wine sales could be made from supermarkets and other wine outlets (Example: winery retail outlets) for consumption "off-premises" on Sundays. The inclusion of beer sales, by the amendment act, into supermarket outlets, posed an obvious threat to the wine industry.

F.1 Historical Time-line of the Development of Wine-making Laws and Regulations to the Present Time

1908 - The first regulations for control of wine-making issued under the Sale of Food and Drug Act 1908 were comparable to those existing in other countries with longer histories of wine-making. These regulations prohibited the addition of water to grape juice, permitted only the use of wine-spirits for fortifying, and specified that wine should be made from grape juice only. Had such regulations been enforced, they would have achieved higher quality standards for the production of wine in New Zealand at an earlier date. However, the general practices of the addition of water and sugar (chaptalisation) for the making of table wines, and the making of fortified wines by the addition of spirits from sources other than the distillation of wine, continued.

1946 - The Food and Drug Regulations, 1946/136 permitted the addition of sugar to wine, a wide-spread practice previously.

1973 - The Food and Drug Regulations, 1973/173 regularised the common practice of including other additives in addition to sugar.

1974 - The 1974 Food Hygiene Regulations, govern the storage, manufacture, preparation, casking and bottling of wine and includes the premises occupied by wine-makers, subjecting these to the same levels of rigorous inspection as those of other food manufacturers.

1980 - The earlier regulations of 1973 were later modified to both codify and more clearly delineate the vexed question of additives to wine (Food and Drug Regulations 1973, Amendment No 5 of 1980).

1981 - Quality assurance of exported wines is covered by the Wine Makers Act of 1981 and the related Winemakers Regulations of 1990.

1984 - Currently the production of wine in New Zealand is controlled by the Food Regulations 1984 together with the more generalised requirements relating to "merchantable quality" of the 1986 Fair Trading Act and its subsequent amendments. As well as the changes to liquor licensing laws the Food and Drug Regulations of 1984 boosted the quality of New Zealand wine by outlawing the common practice of adding water to the fermenting musts. These regulations reduced the addition of water to a maximum of fifty mls per litre (only as a solvent for other permitted additives). Not only do these regulations provide general provisions applicable to all foods/beverages but they also contain specific controls directly related to wine production. Only specified classes of additives are admissible. These include fining agents, sweeteners, stabilising agents and preservatives (Zoecklein, 1990). Maximum limits are set for many of these. For example the addition of sulphur dioxide, which is added to protect against oxidation, is restricted to two hundred parts per million for dry wines, while up to four hundred parts per million is permissible in sweet wines. Additionally the regulations also provide for a maximum alcohol content in table wines of fifteen per cent by volume (Food and Drug Regulations, 1984).

1990 - Quality assurance of exported wines is covered by the Wine Makers Act 1981 and the related Winemakers Regulations of 1990. All wines produced in New Zealand for shipment overseas must be certificated by the Ministry of Health. This certificate states that the export wine complies with both the Food and Drug Act together with its related regulations and is without obvious faults. Two broad areas are considered in such testing:

- A chemical analysis by the Environmental Science Research Institute.
- A blind tasting by a panel of wine industry personnel.

(Wine Makers Regulations, 1990; Wine Makers Act, 1981) (see Figure 8.1 of Chapter 8).

This certification system, being a negative rather than a positive test of quality, has often been criticised because of its failure to ensure that only superior wines are exported from New Zealand. It is generally conceded however, that most faulty wines will be detected prior to shipment (Cooper, 1997).

1995 - Requiring the inclusion of a number of important facts, wine-labelling regulations are designed to protect the consumer. Originally these key particulars included the producers name and address, the wine's country of origin together with its alcohol strength and contents by volume. From 1995 (Food and Drug Regulations, Amendment, 1995), "additive" declarations also became mandatory. For example "Contains Preservative (224)" commonly appears on the labels of New Zealand wines.

In recent years New Zealand wines have adopted a varietal approach to their labelling. Typically labels display the grape variety utilised in making the wine. Regulations require that if the name of a single grape is specified on the label then the wine must contain at least seventy five per cent of wine made from that variety (Food and Drug Regulations, Amendment, 1995). By the standards of other countries this is regarded as a rather low percentage, with countries such as the United States, Australia and European Union (EU) members adopting eighty to eighty five per cent as the benchmark level (Cooper, 1997; Rankine, 1996; Sutcliffe, 1981; Yoxall, 1978). Although this allows for blending with a variety unspecified on the label, more often than not the wine-maker will specify the variety of the other grape although there is no obligation to do so unless the seventy five per cent rule is breached. Where the principal variety constitutes less than seventy five per cent of the final blend then the grape names utilised in making the blended product must be stated in percentage terms in descending order of importance to the blend. Problems of wine-makers substituting an unspecified proportion of a cheaper variety beyond the twenty five per cent level and mislabelling the result, have occurred (Dunleavy, 1999; New Zealand Herald, 1997).

Additional regulations apply to sparkling wines. In New Zealand the use of the term "champagne" is banned as applied to New Zealand sourced wine. For wines exported to the EU from New Zealand the use of the term "methode champenoise" may not be used. If the term "bottle fermentation" is used on the label then the carbon dioxide gas contained in the wine must have resulted from natural fermentation in a bottle of five litres maximum size. Because of these restrictions a number of New Zealand wine-makers are currently utilising the terminology of "methode traditionnelle" for bottle fermented sparkling wine to distinguish these from lower priced carbonated wine (George, 1996; Food and Drug Regulations, Amendment (1995); Halliday, 1995).

1999 - As well as complying with local regulations, wines to be exported overseas must generally adhere to the regulations of the destination country (Dunleavy, 1999). While Australia requires that the number of "standard drinks" contained is declared on the label, the EU has regulations related to 'e' marks. These require that the producer guarantees that the contents by volume figure is accurate.

2001 - The Australia New Zealand Joint Food Standards Code becomes operative from 2003. These standards, common to both Australia and New Zealand, are designed to eventually replace all of the provisions of New Zealand's earlier Food and Drug Regulations

F.2 Historical Time-line of the Development of Governmental Liquor Taxation Policy

1940 - In 1940 sales tax on New Zealand wine was originally set at twenty per cent.

1942 - By 1942, as a war-time expedience, this had doubled and was twice as much as the sales tax on other goods.

1949 - By 1949 (four years after the end of the war) it was reduced back to the original twenty per cent (the same as other goods).

1974 - In 1974 the Sales Tax Act amended the basis of calculation and confirmed that wine was to be taxed at the rate of twenty per cent of the wholesale price which included freight, margins and packaging. Not only were the inclusion of these factors obvious anomalies, but also as the sales tax levied was value related rather than volume related, it tended to discourage the production of quality, but more expensive wine (Scott, 2002). Using these arguments the Wine Institute of New Zealand lobbied intensively for the introduction of an excise duty of 24.9 cents per litre.

1980 - The 1980 report of the Industry Development Commission (IDC) recommended an excise duty of 40 cents per litre, indexed to inflation, on both table and fortified wines to assist the developing wine industry (Lewis, 1990). Eventually the government legislated for an excise duty of fifty cents (table wine) and sixty cents (fortified wine), indexed to the Consumer Price Index (CPI).

1985 - The Labour Government in its 1985 budget doubled the excise duty rate to its current (indexed) level (see Table A.17 of Appendix A) as well as replacing sales tax with Goods and Services Tax, which was almost universal in its application.

1996 - The 1996 Custom & Excise Act embodied these current rates (indexed) of excise duty on grape wine including fortified wine.

2001 - The Taxation Review 2001 Report (McLeod Report), favoured non-specific taxes as between different types of goods rather than specific taxes (Example: excise tax), which tends to distort consumption patterns. This recommendation, as with most of the McLeod report, has been ignored by the present Government.

2003 - Immediately prior to the 2003 Budget, the present Labour Government, concerned about the growing evidence of excessive drinking by youth, substantially increased excise duty on all wine with an alcohol content by volume of between fourteen and twenty-three per cent. This was designed to specifically target the fortified wines of port and sherry (Customs and Excise (Alcoholic Beverages) Amendment Act 2003).

F.3 Historical Time-line of the Implementation and Eventual Removal of Import Controls and Tariffs on Imported Wine up to the Present Time

1935 - In 1935 import controls on wine imports were first introduced in order to give preference to locally produced wine. The local merchants of the time had previously favoured imports because of the higher profit margins involved.

1938 - In 1938 the duty on wine imports were raised to eight shillings and three pence per gallon. As a result local production of cheap fortified wines soared (Scott, 2002).

1964 - Originally designed as a means of promoting local industry as well as conserving foreign exchange, the importation of wine was covered by the Import Licensing Control Regulations 1964 which governed the importation of all non-exempt goods.

1972 - Additionally, tariffs which had always applied to wine imports were doubled following a submission to the Emergency Protection Authority in 1972 by New Zealand wine-makers.

1976 - The 1976/1977 Licensing Schedule further restricted the importation of wine imports in order to enhance the protection of the domestic industry. Eventually a minimum threshold of one dollar per bottle of wine in favour of New Zealand wine was agreed upon.

1977 - During the time of the National Government of the late Sir Robert Muldoon, the Exports Incentives Trade and Industry Act (1977) allowed for taxation credits on all New Zealand produced goods (including wine) and services exported. Scant evidence emerged from this time of any lasting benefit to the wine industry at large (Cooper, 2002), as a result of these measures.

1980 - The 1980 Report of the Industry Development Commission mentioned wine production as a possible growth industry for the future and vineyard plantings, already flourishing began to increase exponentially, encouraged by the favourable taxation treatment accorded to new vineyards. Inevitably the "bust" followed with rumours of the possible collapse of major industry players as a result of over-production and uneconomic prices.

1986 - The Grape Vine Removal Compensation Act of 1986 provided the incentive for growers to remove and burn vast numbers of mainly non-premium vine varieties - over one thousand five hundred hectares of vines were pulled out by growers during this time.

1987 - 1996 - During the late 1980s and 1990s import controls were removed, to be followed later by a progressive reduction in tariffs (see Table A.32 of Appendix A), leading eventually to a zero rate regime in 1995 on wines traded between Australia and New Zealand under the Australia/New Zealand Closer Economic Relations Rules 1995. As noted in Chapter Two these reforms completely revolutionised the quality of New Zealand wine leading eventually to the ensuing success in international markets currently enjoyed by New Zealand's wine exporters (Mikic, 1998).

F.4 Governmental Legislation, Submissions Made and Commissions of Enquiry Mentioned in the Text and Elsewhere in the Appendices

Year	Legislation/Submissions/Commissions
1877	Licensing Act 1877
1879	Amendment of the Licensing Act 1877
1881	Licensing Act 1881
1908	Sale of Food and Drug Act
1908	Distillation Act
1914	Licensing Amendment Act No 1
1917	Sale of Liquor Restriction Act
1944	Invercargill Trust Act
1946	Royal Commission on Liquor Licensing
1946	Food and Drug Regulations 1946/136
1948	Wine Resellers Licensing Act
1953	Licensing Amendment Act No 2
1955	Licensing Amendment Act No 3
1960	Licensing Amendment Act No 4
1962	Sale of Liquor Act
1964	Import Licensing Control Regulations
1965	Amendment of the Sale of Liquor Act
1971	Distillation Act
1972	Submissions to the Emergency Protection Authority
1973	Food and Drug Regulations 1973/173
1974	Sales Tax Act
1974	Food Hygiene Regulations
1974	Submissions to the Royal Commission on Liquor, February 1974

1976	Wine Makers Levy Act
1976/1977	Licensing Schedule
1977	Exports Incentives Trade and Industry Act
1980	Food and Drug Regulations 1973, Amendment No 5
1980	Report of the Industry Development Commission
1981	Wine Makers Act
1984	Food and Drug Regulations, Amendments 1984
1986	Grape Vine Removal Compensation Act
1986	Fair Trading Act
1989	Sale of Liquor Act 1989
1990	Commodities Levy Act
1990	Winemakers Regulations
1990	Sale of Liquor Amendment Act 1990
1991	Resource Management Act 1991
1992	Sale of Liquor Amendment Act 1992
1994	Geographical Indications Act 1994
1994	Public Health Commission - Alcohol Policy Advice Paper
1995	Australia/New Zealand Closer Economic Relations Rules
1995	Food and Drug Regulations, Amendments 1995
1996	Custom & Excise Act
1998	Commodities Levies (Winemaking Grapes) Order
1999	Sale of Liquor Amendment Act 1999
2001	Australia New Zealand Joint Food Standards Code
2001	Taxation Review 2001 ("Mc Leod Report")
2001	The Australia New Zealand Joint Food Standards Code
2003	Customs and Excise (Alcoholic Beverages) Amendment Act 2003

Appendix G – Consumers' Survey

Questionnaire One

Winery Visitation Questionnaire
Section One - General

1. **What is your country of origin ?**

1. New Zealand		5. United Kingdom		9. South Korea	
2. Australia		6. Germany		10. Taiwan	
3. North America		7. Other N. Europe		11. Other Asia	
4. Japan		8. Other S. Europe		12. Other	

If your answer was "New Zealand" in Question 1 Proceed to Question 2. Otherwise proceed to Question 3.

2. **Which of the following best describes your normal domicile within New Zealand?**

1. Large City (population greater than 250,000)	
2. Medium City (population between 50,000 and 250,000)	
3. Small City (population between 20,000 and 50,000)	
4. Provincial Town (population less than 20,000)	
5. Rural Area	

3. **Which one of these age groups do you fit into?**

Male [ ] Female [ ]

1. Under 21 years		5. Between 41 and 50 years	
2. Between 21 and 25years		6. Between 51 and 60 years	
3. Between 26 and 30 years		7. Between 61 and 70 years	
4. Between 31 and 40 years		8. Over 70 years	

4. **Which of the following is your highest educational qualification?**

1. Didn't complete high school		6. University diploma/certificate	
2. High school graduate		7. University undergrad. degree	
3. Polytech diploma/certificate		8. University postgrad.diploma	
4. Polytech undergraduate degree		9. University postgrad. degree	
5. Polytech postgraduate degree		10. Other (specify below)	

Other (please specify)____

5. **Which of these best describes your occupational status?**

1. Professional , Managerial		6. House Person	
2. Other white collar		7. Retired	
3. Skilled		8. Student	
4. Semi Skilled		9. Other	
5. Unskilled		10. Self Employed	

6. **What bracket does your annual income fall into?**

1. Up to $NZ 20,000		7. $NZ 45,001 -- $NZ 50,000	
2. $NZ 20,001 -- $NZ 25,000		8. $NZ 50,001 -- $NZ 55,000	
3. $NZ 25,001 -- $NZ 30,000		9. $NZ 55,001 -- $NZ 60,000	
4. $NZ 30,001 -- $NZ 35,000		10. $NZ 60,001 -- $NZ 65,000	
5. $NZ 35,001 -- $NZ 40,000		11. Greater than $NZ 65,001	
6. $NZ 40,001 -- $NZ 45,000		12. Declined	

Section Two - Visit to Auckland

7. **(a) If you normally reside in Auckland check here [ ] and proceed to Question 13 OR**
   (b) What is the main reason for your visit to Auckland?

1. Visiting Friends or Relatives	
2. Business	
3. Holiday	
4. Convention/Conference	
5. Stopover for holiday in other parts of New Zealand	
6. Other (specify below)	

Other (please specify)____

8. **How long are you staying in Auckland?**

1. Less than 24 hours		6. 3 – 4 weeks	
2. 1 – 2 days		7. 5 – 6 weeks	
3. 3 – 4 days		8. 7 – 9 weeks	
4. 5 – 7 days		9. 10 – 12 weeks	
5. 1 – 2 weeks		10. More than 12 weeks	

9. **How long have you already been in Auckland?**

1. Less than 24 hours		6. 3 – 4 weeks	
2. 1 – 2 days		7. 5 – 6 weeks	
3. 3 – 4 days		8. 7 – 9 weeks	
4. 5 – 7 days		9. 10 – 12 weeks	
5. 1 – 2 weeks		10. More than 12 weeks	

10. How would you describe the type off accommodation you are staying in?

1. With family or friends		6. Backpackers Hostel	
2. Superior hotel		7. Homestay	
3. Quality hotel		8. Camping Ground	
4. Budget hotel		9. Normal Residence	
5. Motel		10. Other (specify below)	

Other(please specify)____

11. Please indicate the types of transport you have used during your stay in Auckland? Please mark the most commonly used transport with "1", the second most commonly used transport with "2" and the third most commonly used transport with "3". Mark those not used with"0". Mark with a rectangle around the number inserted the type of transport you used to visit the winery/vineyard.

1. Rental car		6. Ferry	
2. Private car		7. Walking	
3. Train		8. Campervan	
4. Public Bus		9. Bicycle	
5. Tour Bus		10. Other (specify below)	

Other (please specify)____

12. How would you describe your preferred type of travel?

1. Package Traveller	
2. Tour Group Traveller	
3. Semi Independent Traveller	
4. Free Independent Traveller	

Section Three – Wine Consumption Experience

13. (a) What is your normal monthly household consumption of wine?

1. More than 24 bottles		5. Between 7 and 9 bottles	
2. Between 19 and 24 bottles		6. Between 4 and 6 bottles	
3. Between 13 and 18 bottles		7. Between 1 and 3 bottles	
4. Between 10 and 12 bottles		8. Zero consumption of wine	

(b) What is your normal monthly expenditure on wine?

1. More than $NZ 250		5. Between $NZ 76 and $NZ 100	
2. Between $NZ 176 and $NZ 250		6. Between $NZ 51 and $NZ 75	
3. Between $NZ 126 and $NZ 175		7. Between $NZ 26 and $NZ 50	
4. Between $NZ 101 and $NZ 125		8. Between $NZ 1 and &NZ 25	

(c) How do you rate your overall knowledge of wine?

1. No knowledge at all		5. Very good knowledge	
2. Slight knowledge		6. Extremely good knowledge	
3. Moderate knowledge		7. Superior knowledge	
4. Good knowledge			

(d) From which outlets do you normally purchase your wine supplies?

1. Mail order /Internet		6. Supermarket	
2. Bottle store		7. Restaurant only	
3. Auction		8. Cellar Door	
4. Wine Club		9. Other (specify below)	
5. Wineshop/specialised retailer			

Other (please specify)____

Section Four – Winery Visitation

14. How long prior to your visit to this particular winery did you make plans to visit a winery in the Auckland region?

1. Less than 24 hours		5. Between 3 and 4 weeks	
2. Between 1 and 3 days		6. Between 1 and 3 months	
3. Between 4 and 7 days		7. Between 4 and 6 months	
4. Between 1 and 2 weeks		8. More than 6 months	

15. How did you hear about the wineries in the Auckland region?

1. Brochures		6. Visitor Centres	
2. Newspapers		7. Travel Agencies	
3. Magazines		8. Billboards/Road Side Signs	
4. Television		9. Word of mouth	
5. Radio		10. Other (specify below)	

Other (please specify)____

16. Of the following what were the main factors that led you to decide to visit a winery in the Auckland region?

1. Winery or vineyard tour.	
2. To taste wine produced in the region	
3. To visit a vineyard in a rural setting	
4. To purchase wine direct from the vineyard	
5. To purchase non-wine items Eg: souvenirs	
6. To visit the winery restaurant or cafe.	
7. To socialise with friends and family.	
8. Relaxation.	
9. Meeting the winemaker.	
10. Entertainment or other winery attractions.	
11. A day out.	
12. Picnic or Barbeque.	
13. Other (specify below)	

Other (please specify)____

17. While you are in the region at this particular winery/vineyard do you plan on taking the opportunity to visit other wineries/vineyards in the area? If so how many other ` wine properties do you expect to visit?

1. More than five wineries/vineyards		4. Two other wineries/vineyards	
2. Four other wineries/vineyards		5. One other winery/vineyard	
3. Three other wineries/vineyards		6. No other winery/vineyard	

18. With regard to this particular winery please mark on the following scale (from lowest to highest) how you would rate each of the particular attributes of wine quality, service quality and physical environment quality.

Wine Quality	Lowest								Highest	
aroma	1		2		3		4		5	
label	1		2		3		4		5	
price	1		2		3		4		5	
taste	1		2		3		4		5	
overall	1		2		3		4		5	

Service Quality	Lowest								Highest	
Believable	1		2		3		4		5	
Courteousness	1		2		3		4		5	
Entertainment	1		2		3		4		5	
Friendliness	1		2		3		4		5	
Knowledge	1		2		3		4		5	
Professionalism	1		2		3		4		5	
Overall	1		2		3		4		5	

Environment	Lowest							Highest		
attractive	1		2		3		4		5	
clean	1		2		3		4		5	
display	1		2		3		4		5	
pleasant	1		2		3		4		5	
smells	1		2		3		4		5	
overall	1		2		3		4		5	

19.

(a) If you did not purchase wine during your visit to this particular winery on this occasion please check here [ ] and proceed to Question 22. OR

(b) If you purchased wine during your visit to this particular winery could you please complete Questions 19 – 21?

(c) During the past 12 months how many bottles of wine, regardless of brand, produced by this particular winery have you purchased at any outlet?

1. More than 24		5. Between 5 and 9	
2. Between 20 and 24		6. Between 1 and 4	
3. Between 15 and 19		7. None	
4. Between 10 and 14			

(d) How many bottles of wine did you purchase during this particular visit?

1. More than 24		5. Between 7 and 9	
2. Between 19 and 24		6. Between 4 and 6	
3. Between 13 and 18		7. Between 1 and 3	
4. Between 10 and 12			

(e) What was the total amount you spent on wine purchases during this particular visit?

1. More than $NZ 250		5. Between $NZ 76 and $NZ 100	
2. Between $NZ 176 and $NZ 250		6. Between $NZ 51 and $NZ 75	
3. Between $NZ 126 and $NZ 175		7. Between $NZ 26 and $NZ 50	
4. Between $NZ 101 and $NZ 125		8. Between $NZ 1 and $NZ 25	

20. Of the attributes of wine quality, service quality and physical environmental quality listed above in Question 18 could you please rank them in order of importance by numbering each statement 1 to 3 which enabled you to reach a decision to purchase wine at this particular winery.

	Rank
1. Wine quality	
2. Service quality	
3. Physical environmental quality	

21. What was your intended purpose for the wine you purchased at this particular winery?

1. For consumption within the next week	
2. For consumption within the next month	
3. For consumption within the next year	
4. For storage in your cellar for a period greater than a year	
5. As a gift	
6. Other (specify below)	

Other (please specify)____

22. (a) Did you purchase any goods or services other than wine while visiting this particular winery/vineyard?

1. Souvenirs Eg: T-shirts, wineglasses, cork removers etc.	
2. Restaurant meals	
3. Barbecue meals	
4. Other entertainment	
5. Accommodation	
6. Other (specify below)	

Other (pleasespecify)____

(b) What was the value of these other goods and services that you purchased?

1. More than $NZ 250		**5. Between $NZ 76 and $NZ 100**	
2. Between $NZ 176 and $NZ 250		**6 Between $NZ 51 and $NZ 75**	
3. Between $NZ 126 and $NZ 175		**7. Between $NZ 26 and $NZ 50**	
4. Between $NZ 101 and $NZ 125		**8. Between $NZ 1 and &NZ 25**	

23. Please mark on the following scale your overall satisfaction/dissatisfaction in visiting this particular vineyard/winery.

1. Extremely unsatisfactory	
2. Unsatisfactory	
3. Neutral	
4. Satisfactory	
5. Most satisfactory	

Appendix H – Producers' Survey

Questionnaire Two

Winery/Vineyard Questionnaire

1. **Do you permit visits to your winery by members of the public?**

   Yes [ ] No [ ]

2. **If you would be agreeable to an interview over the next few months would you please check the appropriate box below?**

   Yes [ ] No [ ]

Questionnaire Three

Winery/Vineyard Questionnaire

General Information

1. Within which grouping of years was your winery founded?

1. Since 1999		6. Between 1970 and 1979	
2. Between 1995 and 1999		7. Between 1950 and 1969	
3. Between 1990 and 1994		8. Between 1930 and 1949	
4. Between 1985 and 1989		9. Between 1910 and 1929	
5. Between 1980 and 1984		10. Before 1909	

2. In which specific area of Auckland is your winery located?

1. Henderson/Henderson Valley	
2. Kumeu/Huapai/Taupaki/Waimauku/Riverhead/Hobsonville	
3. South Auckland	
4. Waiheke	
5. Matakana/Mahurangi	

3. Could you please give an indication as to the relative size of you winery/vineyard as follows:

(a) How many ha of grapes are currently grown in your own vineyard within the following ranges (exclude contract growers)?

1. Less than 3ha		5. Between 16 and 20ha	
2. Between 3 and 5ha		6. Between 21 and 50ha	
3. Between 6 and 10ha		7. Between 51 and 100ha	
4. Between 11 and 15ha		8. More than 100ha	

(b) How many tonnes of grapes including grapes purchased from contract growers are crushed at harvest within the following ranges?

1. Less than 30 tonnes		5. Between 151 and 200 tonnes	
2. Between 31 and 50 tonnes		6. Between 201 and 500 tonnes	
3. Between 51 and 100 tonnes		7. Between 501 and 1000 tonnes	
4. Between 101 and 150 tonnes		8. More than 1001 tonnes	

(c) How many full time employees are employed (including working shareholders/directors and other family members)?

1. Less than 3 employees		5. Between 11 and 15 employees	
2. Between 3 and 5 employees		6. Between 16 and 20 employees	
3. Between 6 and 7 employees		7. Between 21 and 30 employees	
4. Between 8 and 10 employees		8. More than 30 employees	

(d) How many part time employees are employed (including working shareholders/directors and other family members)?

1. Less than 3 employees		5. Between 11 and 15 employees	
2. Between 3 and 5 employees		6. Between 16 and 20 employees	
3. Between 6 and 7 employees		7. Between 21 and 30 employees	
4. Between 8 and 10 employees		8. More than 30 employees	

Viticultural Information

4. Could you please give an indication as to the approximate percentage of your crush as divided between the following grape varieties?

Variety	%	Variety	%
1. Cabernet Franc		10. Palomino	
2. Cabernet Sauvignon		11. Pinot Gris	
3. Chardonnay		12. Pinot Noir	
4. Chenin Blanc		13. Pinotage	
5. Gewurztraminer		14. Riesling	
6. Malbec		15. Sauvignon Blanc	
7. Merlot		16. Semillon	
8. Muscat Varieties		17. Syrah	
9. Muller Thurgau		18. Other (specify below)	

Other (please specify)____

5. Of grapes crushed during harvest time by your winery could you please give an indication of the percentage source of these by geographic area ?

	%		%
1. Northland		7. Wairarapa	
2. Auckland		8. Marlborough	
3. Waikato		9. Nelson	
4. Bay of Plenty		10. Canterbury	
5. Gisborne		11. Central Otago	
6. Hawkes Bay		12. Other (specify below	

Other (please specify)____

Winery facilities, attributes, advantages, disadvantages and promotional

6. Wine tourism, providing as it does an additional outlet for wine sales direct from winery to the consumer provides a number of advantages for a particular winery. Listed below are a number of possible advantages. Could you please rank these in order of importance? If you consider that they are of no importance in your particular case please write a "0" alongside that particular item.

1. Increased margins on sales made direct to the consumer	
2. An additional sales outlet	
3. Building brand loyalty resulting in additional sales from all other outlets	
4. Enhancement of brand image	
5. Enhancement of vineyard/winery image	
6. Opportunity for consumers to try a new product with little financial risk	
7. Additional advertising using branded souvenirs E.g.: wine glasses etc	
8. Enhancing industry awareness by providing educational opportunities	
9. Providing market intelligence by interaction directly with consumers	
10. Assisting to develop the economic base of the immediate region generally	
11. Other (specify below)	

Other (please specify)____

7. It is generally recognised that there can be some disadvantages in wine tourism.Listed below are a number of possible disadvantages. Could you please rank these in order of importance? If you consider that they are of no importance in your particular case please write a "0" alongside that particular item.

1. Increased monetary costs to operate tasting facilities	
2. Increased time costs to operate tasting facilities	
3. Additional capital required to construct winery tourist facilities	
4. Inability to substantially increase sales because of geographic location	
5. Other (specify below)	

Other (please specify)____

8. Do you use any of the following means of advertising in order to attract wine tourists to your winery/vineyard?

1. Brochures		7. Visitor Centres	
2. Newspaper Advertising		8. Travel Agencies	
3. Magazines Advertising or Articles		9. Billboards/Road Side Signs	
4. Television		10. Member of a wine trail group	
5. Radio		11. Newspaper Articles	
6. Internet		12. Other (specify below)	

Other (please specify)____

9. Consumers reach purchasing decisions based upon how they perceive various attributes. Please mark on the following scale (from lowest to highest) how you would rate each of the particular attributes of wine quality, service quality and physical environment quality with regard to your particular winery.

Wine Quality	Lowest								Highest	
aroma	1		2		3		4		5	
label	1		2		3		4		5	
price	1		2		3		4		5	
taste	1		2		3		4		5	
overall	1		2		3		4		5	

Service Quality	Lowest								Highest	
believable	1		2		3		4		5	
courteousness	1		2		3		4		5	
entertainment	1		2		3		4		5	
friendliness	1		2		3		4		5	
knowledge	1		2		3		4		5	
professionalism	1		2		3		4		5	
overall	1		2		3		4		5	

Environment	Lowest								Highest	
attractive	1		2		3		4		5	
clean	1		2		3		4		5	
display	1		2		3		4		5	
pleasant	1		2		3		4		5	
smells	1		2		3		4		5	
overall	1		2		3		4		5	

10. Of the attributes of wine quality, service quality and physical environmental quality listed above in Question 18 could you please rank them in your perceived order of importance by numbering each statement 1 to 3.

	Rank
1. Wine quality	
2. Service quality	
3. Physical environmental quality	

11 a. Below is a list of additional facilities that could be offered to visitors visiting a vineyard/winery. Could you please check each box alongside the facilities that you have available for visitors?

Type of Visitor Facility

1. Cellar door (opened during all normal trading hours)	
2. Cellar door (opened weekends only or by arrangement)	
3. Tours offered of vineyard	
4. Tours offered of winery production facilities	
5. Gifts, arts, crafts, souvenirs shop	
6. Picnic area	
7. Restaurant	
8. Barbecue facilities	
9. Function facilities	
10. Conference facilities	
11. Historic Buildings, Wine museum	
12. Children's Playground	
13. Disabled Facilities	
14. Accommodation	
15. Other (please specify below)	

Other (please specify)____

11 b. Do you charge tasting fees?

Always Yes [ ] Always No [ ] Sometimes [ ]

If your answer was Always Yes or Sometimes please answer Question 11 c. otherwise proceed to Question 12.

11 c. Please mark the range of tasting fees you normally charge:

1. $2 or less		**5. $8.01 to $10.00**	
2. $2.01 to $4.00		**6. $10.01 to $12.00**	
3. $4.01 to $6.00		**7. $12.01 to $15.00**	
4. $6.01 to $8.00		**8. More than $15.01**	

Established wine and tourism industry networks

12. Do you have any business relationships with the following organisations?

1. Wine Institute of New Zealand Inc	
2. Any Food and Wine Festivals held within New Zealand	
3. Any Visitor Information Centres	
4. Any Regional Tourism Organisations	
5. With any tour company to promote winery visitation tours	
6. With other wineries/vineyards in the area to promote a "wine trail"	
6. With New Zealand Way	

Wine tourism sales and overall statements

13. Of your annual sales by value approximately what percentage is sold directly to visitors to your winery?

1. Less than 5%		6. Between 26% and 30%	
2. Between 6% and 10%		7. Between 31% and 40%	
3. Between 11% and 15%		8. Between 41% and 50%	
4. Between 16% and 20%		9. Between 51% and 60%	
5. Between 21% and 25%		10. More than 61%	

14. In the future where do you see the greatest potential for increasing your sales revenue?

1. Directly to winery visitors	
2. Export Sales	
3. Domestic sales through normal distribution channels	
4. Other (specify below)	

Other (please specify)____

15. With regard to the following statements could you please signify the extent to which you agree or disagree?

	Agree								Disagree	
1.Visitors contribute greatly to my business	1		2		3		4		5	
2.Visitors taste wine but rarely buy	1		2		3		4		5	
3.Visitors demand vineyard tours but rarely buy	1		2		3		4		5	
4.Allowing visitor tasting promotes future sales	1		2		3		4		5	
5.Attending to visitors is very time consuming	1		2		3		4		5	

Appendix I - Instructions to Interviewers for Questionnaire one and Questionnaire three

I.0 Questionnaire one Instructions

I.0.0 Introduction

This survey is designed firstly to determine the motivation(s) of the respondent to engage in winery visitation(s) as well as to determine the respondent's level of satisfaction, as represented by various criteria, with this particular touristic experience. The survey is to take place between April 1 2003 and June 30 2003.

Total number of persons to be interviewed by you is _____. Listed in the computer printout "Random Winery Selection" followed by the interviewer's name.

The interviewer should approach the randomly selected prospective respondent (refer below) as they are leaving the particular winery (refer below) and ask if they would be prepared to participate in a survey related to their recent visit to the ___________ winery. At this stage for each person stopped the interviewer should complete the numbered "Respondent Prospects" __________ (Winery Name) _______(Date) schedule as follows:

RD	Respondent declines to complete the questionnaire.	Thank the respondent and and say "Good bye".
RC	Respondent wishes to cooperate in the interview.	Go through the questionnaire allowing the respondent to complete each section & assisting with problems as required.

If the winery is not opened (NO), or if the winery does not open to the public for cellar door sales (NW), mark these notations across the top of the

"Respondent Prospects" Schedule for that particular winery on that particular day under the heading "Winery Status".

I.0.1 Random Selection of Winery:

All of the wineries in the Auckland Region have been numbered from 1 to 66 (refer Appendix D). Practically all of these have a winery open to the public for cellar door sales. In spite of a recent law change for other (often religious) reasons some of these do not open on Sundays. Using the "Random Winery Selection" printed by the computer which is based on the computer's random number generator (using a random seed) the printout reading from left to right is as follows:

Winery Number	Day of Visit	Time of Visit
(Per Winery List)	(Numbered 1 - 91)	(0900 - 1600)
	(Commences 1 April 2003)	(9:00am to 4:00pm)

E.g.: 23 (Kumeu River) 45 (May 15) 1100 (11:00am)

I.0.2 Random Selection of Respondents:

Most of the wineries in the region are aware of the survey and its objectives. Although you will approach the respondents outside the entrance door to the winery you should telephone the manager of the winery first and when you arrive introduce yourself.

As prospective respondents emerge from the winery select every tenth person and stop him or her (refer I.0.3 Introduction to Prospective Respondent). As the estimated time to complete the questionnaire is only thirteen minutes for each respondent there should not be any over-lapping of respondents completing forms.

I.0.3 Introduction to Prospective Respondent

The following introduction is an example only of how to introduce oneself but each interviewer can approach the respondent in a flexible way.

Introduce Yourself: Hello. I am ____________ . We are conducting a survey for a post-graduate research thesis at Massey University at Albany. We would like to get you to complete a consumer survey concerning visits to wineries in the Auckland Region. The survey relates to ____________(name of winery) the reasons you chose to come here and your satisfaction with the winery facilities and the service you received during your visit. The survey should only take you a little over ten minutes to complete. Your response will be strictly confidential and will be used for the purpose of the survey only. Would you be prepared to assist us by completing the survey?

I.0.4 Questionnaire Notes

Q1 Is designed to determine if the respondent is an overseas visitor or a local resident.

Q2 Relates to local residents to determine the respondent's normal residential environment.

Q3 – Q6 These are purely demographic questions which should provide no difficulties to respondents.

Q7 Respondent may need assistance if there is no suitable alternative listed.

Q8 – Q12 These questions determine the touristic behaviors of the respondent in this particular instance. In the case of Q12 an explanation as to the three different types of travel might be required.

Q13 This question relates to the respondent's past experience with wine. Assistance may be required by the respondent with reference to Q13 (d) of the questionnaire. You could probably assist the respondent by asking her/him about various wine types – allow the respondent to finally assess the level of their own wine knowledge after considering your questions.

Q14 - Q17 These questions relate to the respondent's motivation(s) to visit wineries in the Auckland region and the mechanisms by which the final choice was made. The respondent may require assistance in the "other" category of both Q15 & Q16.

Q18 This question relates to the particular winery that the respondent was visiting when the questionnaire was completed. The categories are reasonably self-explanatory.

Q19 – Q21 These questions only relate to respondents who have purchased wine on the occasion that the questionnaire was completed.

Q 22 Relates to other goods or services purchased by the respondent during her/his visit. The question is fairly self-explanatory.

Q 23 This question really is an overall assessment by the respondent with regard to her/his experience as a visitor to this particular vineyard/winery.

I.0.5 Interview Closure

When the respondent has completed the questionnaire thank them for their assistance answering any questions that they might have regarding the survey and the purposes that it will be used for. On the "Respondent Prospects" Schedule for that particular winery on that particular day note IC alongside the number of the respondent as well as the time of the interview completion in the appropriate column.

I.0.6 Example of Completed Respondent Prospects Schedule

Respondent Prospects Schedule

Winery Name : Kumeu River **Number of Prospective Respondents** : 5

Interviewer : Debbie Musto **Commencing Prospect Number** : 156

Date : May 15 2003 **Time Commenced** : 11-00 am

Winery Status : WO (See below for key)

Number	Prospect Status	Completion	Notes
156	:RC	:IC 11:20am	Excellent Responses
157	:RC	:IC 11:34am	Difficult Respondent
158	:RD	-------------	In a hurry to leave
159	:RC	:IC 12:25pm	Careful with responses
160	:RC	:IC 12:50pm	Good respondent

Winery Status Key:

NO Winery not opened at this particular time or on this particular day.

NW Winery is never opened to the public.

WO Winery is open on this particular time and day.

Prospects Status Key:

RD	Respondent declines to complete the questionnaire.	Thank the respondent and and say "Good bye".
RC	Respondent wishes to cooperate in the interview.	Go through the questionnaire allowing the respondent to complete each section & assisting with problems as required.
IC	Interview completed successfully.	
IT	Interview terminated part way through by the respondent.	

I.1 Questionnaire three Instructions

I.1.0 Introduction

This survey follows up the responses received from vineyards/wineries from Questionnaire two. The interviews are to take place between April 1 and May 20 2003. Essentially this particular questionnaire is a core part of an interview conducted with as many of the vineyards/wineries in the Auckland region who are willing to participate. As all of these businesses are to be approached, (Refer Appendix D), the survey is not at all random with regard to either vineyard/winery selection or date and time of the interview.

I.1.1 Introduction to Respondent

Prior to the interview the respondent vineyard/winery should be contacted by telephone and should be aware of both the reason for the research and the nature of the interview and questionnaire to be conducted. In spite of this, it is probably desirable for the interviewer to reiterate these points again especially those related to confidentiality.

The following introduction is an example only of how to introduce oneself, but each interviewer can approach the interviewee with modifications dependent upon the respondent's perceived approachability at the time of the interview.

Introduce Yourself: Hello. I am ____________ . We are conducting a survey for a post-graduate research thesis at Massey University at Albany. We would like to get you to complete a producer survey concerning wine tourism in the Auckland Region. The survey relates to general particulars of your business, your attitude to winery visitors generally together with the facilities that you have available for such visitors. The survey should only take you a little over fifteen minutes to complete. Your responses will be strictly confidential and will be used for the purpose of the survey only. Would you be prepared to assist us by completing the survey?

I.1.2 Questionnaire Notes

Q1 - Q2 These questions relate to the length of time that the vineyard/ winery has been operating as well as its specific location within the Auckland region.

Q3 Relates to the size of the vineyard/winery measured in term of area, grape tonnage crushed and number of people working in the business.

Q4 - Q5 Relates to the grapes utilized annually in the business with regard to both variety and region grown.

Q6 - Q8 These questions relate specifically to wine tourism. Advantages versus disadvantages as well as any promotional techniques used. The respondent may raise other issues in either of these questions. More specifically if the respondent makes other statements not generally covered in the questionnaire as alternatives, then the interviewer should note these down on a separate sheet of paper

Q9 - Q10 These same questions were also asked in the consumer survey. The aim of repeating the same questions in the producer survey is to ascertain with regard to each winery if there are widely differing perceptions of the quality of the facility as between the two groups.

Q11 Is designed to establish for each vineyard/winery a record of all services and physical facilities offered for visitor enjoyment. Again the respondent may suggest other facilities not covered in the questionnaire; these should be recorded by the interviewer separately if the space provided on the questionnaire under "other" is insufficient.

Q12 This question seeks to discover the extent to which "networking " exists with other tourism enterprises/organizations. Again if the respondent suggests other industry relationships that are not provided for in the questionnaire then these should also be noted separately.

Q13 - Q14 This question seeks to establish, for this particular vineyard/ winery, both the present and future importance of wine tourism as measured in terms of revenue earned from sales made directly to visitors.

Q15 The statements listed are examples of common responses by vineyard/ winery owners to other surveys that have been undertaken in other wine producing regions. The respondent may make other statements that could be useful. You will have to use your own judgment as to whether or not these are worth recording separately.

I.1.3 Interview Closure

When the interview has been completed together with the questionnaire, thank the respondent for their assistance answering any questions that they might regarding the survey and the purposes that it will be used for. Could you then record at the top of the questionnaire the date as well as the start and finish times of the interview and also ensure that any other sheets of paper pertaining to the questionnaire completion are annexed.

Appendix J - Data Analysis of Consumers' Survey

J.0 Size of Sample Calculation

Formula to calculate the sample size is $n = \frac{P(100 - P)}{E^2}$

(Easterby-Smith *et. al.*, 2002, p. 136)

where:

n = sample size required

P = the approximate percentage of the population with the characteristic

E = the maximum error required

To calculate the approximate size of the wine tourism population:

From Statistics New Zealand (2002e):

New Zealand's adult population (> 18 y.o.) = 3,100,000

From Statistics New Zealand (2002c):

International adult visitors = 1,920,000

Average length of stay = 9.8 days

Number of visitors in country an average = 52,000

Total adult population at any one time = 3,152,000

Wine tourism participation rates

residents (Lawson *et al.*, 1997) 17.4%

visitors (Tourism New Zealand, 2003) 13.0%

To calculate the approximate percentage of the population who are wine tourists :

adult residents 3,100,000 x 17.4% = 539,400

international visitors 52,000 x 13.0% = 6,760

Total = 546,160

As a percentage of adult population

(both residents and visitors at any one time)

$\frac{546{,}160}{3{,}100{,}000 + 52{,}000}$ to calculate E = 17.32%

Maximum error required **= p< .002 (2%)**

substituting in the above formula $$n = \frac{P(100 - P)}{E^2}$$

$$n = \frac{17.32\ (100 - 17.32)}{2^2}$$

$$n = \frac{1432}{4}$$

$$n = 358$$

Minimum sample size is 358 and at a 66% valid response rate for a supervised, self-administered survey (Zikmund, 2003; Easterby-Smith *et al.*, 2002), the minimum number of wine tourists to be approached is 542.

J.1 Calculation of Median Lengths of Stay in Auckland

J.1.0 Intended length of stay in Auckland

n = 70;

< 1 day = 2 respondents

1 - 2 days = 4 respondents

3 - 4 days = 11 respondents

5 - 6 days = 17 respondents

7 - 14 days = 18 respondents

$$\text{median} = 7 + \frac{1 \times 7}{18} = 7.38 \text{ days}$$

Median = 7.4 days

J.1.1 Length of stay in Auckland at time of winery visit

< 1 day = 4 respondents

1 - 2 days = 11 respondents

3 - 4 days = 18 respondents

5 - 7 days = 10 respondents

$$\text{median} = 4 + \frac{2 \times 2}{10} = 4.4 \text{ days}$$

Median = 4.4 days

J.2 Calculation of Means of Wine Purchases from the Cellar Door

J.2.0 Mean of bottles purchased historically from the specific winery visited

Wine sub-region	Henderson/ Henderson Valley	Kumeu /Huapai Waimauku	Matakana/ Mahurangi	South Auckland	Waiheke Island	Totals
	Freq. Bots. n = 94	Freq. Bots. n = 75	Freq. Bots. n = 56	Freq. Bots. n = 27	Freq. Bots. n = 66	Freq. Bots. n = 318
more than 24 bottles (frequency x 24)	7 = 168	6 = 144	3 = 72	2 = 48	3 = 72	21= 504
20 to 24 bottles (frequency x 22)	4 = 88	5 = 110	1 = 22	1 = 22	3 = 66	14 = 308
15 to 19 bottles (frequency x 17)	8 = 136	5 = 85	3 = 51	2 = 34	2 = 34	20 = 340
10 to 14 bottles (frequency x 12)	10 =120	10 =120	6 = 72	3 = 36	5 = 60	34 = 408
5 to 9 bottles (frequency x 7)	30 =210	22=154	20=140	9 = 63	23 =161	104= 728
1 to 4 bottles (frequency x 2.5)	22 = 55	16 = 40	8 = 20	6 = 15	11 = 28	63=158
0 bottles (frequency x 0)	13 = 0	11 = 0	15 = 0	4 = 0	19 = 0	62 = 0
Totals	94 =777	75=653	56=377	27= 218	66=421	318=2446
Mean	**8.3**	**8.7**	**6.7**	**8.1**	**6.4**	**7.7**

J.2.1 Means of bottles purchased during this visit to the specific winery

Wine sub-region	Henderson/ Henderson Valley	Kumeu /Huapai Waimauku	Matakana/ Mahurangi	South Auckland	Waiheke Island	Totals
	Freq. Bots. n = 94	Freq. Bots. n = 75	Freq. Bots. n = 56	Freq. Bots. n = 27	Freq. Bots. n = 66	Freq. Bots. n = 318
more than 24 bottles (frequency x 24)	1= 24	2= 48	0= 0	1= 24	1= 24	5 = 120
19 to 24 bottles (frequency x 21.5)	3= 65	1= 21	1= 21	1= 22	1= 22	7 = 151

13 to 18 bottles (frequency x 16.5)	4= 66	3= 49	4= 66	2= 33	4= 66	17= 280
10 to 12 bottles (frequency x 11)	6=66	5= 55	3= 33	3= 33	3= 33	20= 220
7 to 9 bottles (frequency x 8)	7= 56	6= 48	3= 24	3= 24	3= 24	22= 176
4 to 6 bottles (frequency x 5)	18= 90	13= 65	15= 75	5= 25	20=100	71= 355
1 to 3 bottles (frequency x 2)	55=110	45=90	30= 60	12= 24	34= 68	176=352
Totals	94=477	75=376	56=279	27= 185	66=337	318=1654
Mean	**5.1**	**5.0**	**4.9**	**6.9**	**5.1**	**5.2**

J.2.2 Calculation of average price for each bottle of wine purchased

Wine sub-region	Henderson/ Henderson Valley	Kumeu /Huapai Waimauku	Matakana/ Mahurangi	South Auckland	Waiheke Island	Totals
Mean Bottles	5.1	5.0	4.9	6.9	5.1	5.2
Mean $'s spent	$46.67	$51.66	$54.27	$59.29	$55.30	$52.05
Average Price	**$9.15**	**$10.32**	**$11.07**	**$8.59**	**$10.84**	**$10.00**

(Derived from J.2.1 and J.2.3)

J.2.3 Mean of wine expenditure by wine tourists during this visit to the specific winery

Wine sub-region	Henderson/ Henderson Valley Freq. $'s. n = 94	Kumeu /Huapai Waimauku Freq. $'s. n = 75	Matakana/ Mahurangi Freq. $'s. n = 56	South Auckland Freq. $'s. n = 27	Waiheke Island Freq. $'s. n = 66	Totals Freq. $'s. n = 318
more than $250 (frequency x 250)	1= 250	2= 500	0= 0	1= 250	1= 250	5= 1250
$176 to $250 (frequency x 212.50)	2= 425	1= 212	2= 425	0= 0	2= 425	7=1487
$126 to $175 (frequency x 150)	2= 300	3= 450	3= 450	2= 300	3= 450	13=1950
$101 to $125	6= 675	5= 563	4= 450	2= 225	4= 450	21=2363

(frequency x 112.50)						
$76 to $100	7= 612	6= 525	3= 263	3=263	4=350	23=2013
(frequency x 87.5)						
$51 to $75	14= 875	10= 625	9= 563	4= 250	10= 625	47=2938
(frequency x 62.5)						
$26 to $50	19= 713	16= 600	18= 675	5= 188	23= 863	81=3039
(frequency x 37.5)						
$1 to $25	43= 537	32= 400	17= 213	10=125	19= 237	121=1512
(frequency x 12.5)						
Totals	94=4387	75=3875	56=3039	27=1601	66=3650	318=16552
Mean	**$46.67**	**$51.66**	**$54.27**	**$59.29**	**$55.30**	**$52.05**

J.2.4 Mean of other expenditure by wine tourists during this visit to the specific winery

Wine sub-region	Henderson/ Henderson Valley Freq. $'s. n = 123	Kumeu /Huapai Waimauku Freq. $'s. n = 101	Matakana/ Mahurangi Freq. $'s. n = 65	South Auckland Freq. $'s. n = 41	Waiheke Island Freq. $'s. n = 73	Totals Freq. $'s. n = 403
more than $250	0= 0	0= 0	1= 250	0= 0	3= 750	4=1000
(frequency x 250)						
$176 to $250	0= 0	1=212	1= 213	0= 0	2= 425	4= 850
(frequency x 212.50)						
$126 to $175	1= 150	0= 0	2= 300	1= 150	3= 450	7=1050
(frequency x 150)						
$101 to $125	3= 338	2= 225	2= 225	1= 112	3= 337	11=1237
(frequency x 112.50)						
$76 to $100	5= 437	4= 350	3=263	2=175	4= 350	18=1575
(frequency x 87.50)						
$51 to $75	7= 437	5= 313	4= 250	2= 125	7= 437	25=1562
(frequency x 62.50)						
$26 to $50	12= 450	7= 262	11= 413	2= 75	8= 300	40=1500
(frequency x 37.50)						
$1 to $25	14= 175	22= 275	11= 137	2= 25	12=150	61= 762

(frequency x 12.50)						
$0	81= 0	60= 0	30= 0	31= 0	31= 0	233= 0
(frequency x 0)						
Totals	**123=1987**	**101=1637**	**65=2051**	**41= 662**	**73=3199**	**403=9536**
Mean	**$16.15**	**$16.20**	**$31.55**	**$16.14**	**$43.82**	**$23.66**
(all visitors)						
Mean	**$47.31**	**$39.92**	**$58.60**	**$66.20**	**$76.16**	**$56.09**
(excludes those who didn't purchase)						

J.3 Scoring of the Satisfaction/Dissatisfaction Levels by Auckland Wine Sub-region

Wine sub-region	**Henderson/ Henderson Valley n=123**	**Kumeu /Huapai Waimauku n=101**	**Matakana/ Mahurangi n=65**	**South Auckland n=41**	**Waiheke Island n=73**	**Totals n=403**
Extr. unsatisfactory	15= 15	7= 7	5=5	7=7	3= 3	37= 37
(frequency x 1)						
Unsatisfactory	23= 46	14=28	8=16	9=18	7= 14	61=122
(frequency x 2)						
Neutral	28= 84	26= 78	18=54	12=36	18= 54	102=306
(frequency x 3)						
Satisfactory	39=156	32=128	21=84	10=40	27=108	129=516
(frequency x 4)						
Most satisfactory	18= 90	22=110	13=65	3=15	18= 90	74=370
(frequency x 5)						
Total	**123=391**	**101=351**	**65=224**	**41=116**	**73=269**	**403=1351**
Mean Score	**3.17**	**3.47**	**3.44**	**2.82**	**3.68**	**3.35**

Appendix K - Data Analysis of Consumers' Survey

K.0 Calculation of Median of Year Winery/Vineyard established

Wine sub-region	Henderson/ Henderson Valley n=16	Kumeu /Huapai Waimauku n=10	Matakana/ Mahurangi n=6	South Auckland n=8	Waiheke Island n=11	Totals n=51
Before 1909	3	0	0	0	0	3
1910 to 1929	4	1	0	0	0	5
1930 to 1949	3	3	0	1	0	7
1950 to 1969	3	1	0	1	0	5
1970 to 1979	1	1	1	0	0	3
1980 to 1984	1	0	1	0	1	3
1985 to 1989	1	2	1	1	3	8
1990 to 1994	0	1	2	2	3	8
1995 to 1999	0	1	1	2	3	7
After 1999	0	0	0	1	1	2
Total to grouping prior	7	4	2	3	4	23
Year Prior	1929	1949	1984	1989	1989	1979
Add	1x 20	.5x20	.5x5	1.5x5	2x5	3x5
	3	1	3	2	3	3
Median =	**1935**	**1959**	**1985**	**1993**	**1992**	**1984**

K.1 Calculation of Mean and Median of Size Indicators

K.1.0 Calculation of mean and median of vineyard size

Wine sub-region	Henderson/ Henderson Valley n=16	Kumeu /Huapai Waimauku n=10	Matakana/ Mahurangi n=6	South Auckland n=8	Waiheke Island n=11	Totals n= 51
Less than 3 ha (frequency x 2)	3= 6	1= 2	2= 4	2= 4	5= 10	13= 26
Between 3 and 5 ha (frequency x 4)	3= 12	1= 4	1= 4	2= 8	3= 12	10= 40
Between 6 and 10 ha (frequency x 8)	4= 32	1= 8	1= 8	1= 8	2= 16	9= 72
Between 11 and 15 ha (frequency x 13)	3= 39	2= 26	1= 13	0= 0	1= 13	7= 91
Between 16 and 20 ha (frequency x 18)	2= 36	2= 36	1= 18	2= 36	0= 0	7=126
Between 21 and 50 ha (frequency x 35)	1= 35	3= 105	0= 0	0= 0	0= 0	4=140
Between 51 and 100 ha (frequency x 75)	0= 0	0= 0	0= 0	1= 75	0= 0	1= 75
More than 100 ha	0= 0	0= 0	0= 0	0= 0	0= 0	0= 0

(frequency x 100)

Total	**16= 160**	**10= 181**	**6= 47**	**8=131**	**11= 51**	**51=570**
Mean	**10 ha**	**18.1 ha**	**7.8 ha**	**16.3 ha**	**4.6 ha**	**11.2 ha**
median =	$5 + \frac{2 \times 5}{4}$	$10 + \frac{2 \times 5}{2}$	$2 + \frac{1 \times 3}{1}$	$2 + \frac{2 \times 3}{2}$	$2 + \frac{1 \times 3}{3}$	$5 + \frac{3 \times 5}{9}$
Median	**=7.5 ha**	**=15 ha**	**= 5 ha**	**= 5 ha**	**= 3 ha**	**= 6.6 ha**

K.1.1 Calculation of mean and median of tonnes of grapes crushed

Wine sub-region	Henderson/ Henderson Valley n=16	Kumeu /Huapai Waimauku n=10	Matakana/ Mahurangi n=6	South Auckland n=8	Waiheke Island n=11	Totals n=51
Less than 30 tonnes (frequency x 15)	3= 45	1= 15	4= 60	3= 45	7=105	18= 270
Between 31 and 50 tonnes (frequency x 40)	2= 80	0= 0	2= 80	1= 40	2= 80	7= 280
Between 51 and 100 tonnes (frequency x 75)	3= 225	1= 75	0= 0	1= 75	1= 75	6 = 450
Between 101 and 150 tonnes (frequency x 125)	3= 375	2= 250	0= 0	0= 0	1=125	6 =750
Between 151 and 200 tonnes (frequency x 175)	1= 175	1= 175	0= 0	1= 175	0= 0	3= 525
Between 201 and 500 tonnes (frequency x 350)	1= 350	1= 350	0= 0	0= 0	0= 0	2= 700
Between 501 and 1000 tonnes (frequency x 750)	1= 750	2= 1500	0= 0	0= 0	0= 0	3= 2250
More than 1001 tonnes (frequency x 1000)	2=2000	2= 2000	0= 0	2= 2000	0= 0	6=6000
Total	16= 4000	10= 4365	6= 140	8= 2335	11= 385	51=11225
Mean (tonnes)	**250**	**437**	**23**	**291**	**35**	**220**
Median (tonnes)	**83**	**175**	**22.5**	**40**	**25.7**	**58.3**

K.1.2 Calculation of mean and median of full-time employees (including owners)

Wine sub-region	Henderson/ Henderson Valley n=16	Kumeu /Huapai Waimauku n=10	Matakana/ Mahurangi n=6	South Auckland n=8	Waiheke Island n=11	Totals n=51
Number of employees						
Less than 3 (frequency x 2)	4= 8	3= 6	4= 8	4= 8	6= 12	21= 42
Between 3 and 5 (frequency x 4)	3=12	2= 8	2= 8	2= 8	3= 12	12= 48
Between 6 and 7 (frequency x 6.5)	2=13	0= 0	0= 0	0= 0	1= 6.5	3= 19.5

Between 8 and 10 (frequency x 9)	3= 27	1= 9	0= 0	0= 0	1= 9	5=45
Between 11 and 15 (frequency x 13)	1= 13	0= 0	0= 0	0= 0	0= 0	1= 13
Between 16 and 20 (frequency x 18)	1= 18	1= 18	0= 0	0= 0	0= 0	2= 36
Between 21 and 30 (frequency x 25)	0= 0	1= 25	0= 0	0= 0	0= 0	1= 25
More than 30 (frequency x 30)	2= 60	2= 60	0= 0	2= 60	0= 0	6=180
Total	**16=151**	**10=126**	**6=16**	**8= 76**	**11=39.5**	**51=408.5**
Mean	**9.4**	**12.6**	**2.6**	**9.5**	**3.6**	**8.0**
Median	**6.5**	**5.0**	**2.3**	**1.5**	**3.0**	**4.3**

K.1.3 Calculation of mean and median of part-time employees (including owners)

Wine sub-region	Henderson/ Henderson Valley n=16	Kumeu /Huapai Waimauku n=10	Matakana/ Mahurangi n=6	South Auckland n=8	Waiheke Island n=11	Totals n=51
Number of employees						
None (frequency x 0)	7= 0	5= 0	4= 0	3= 0	7= 0	26=0
Less than 3 (frequency x 2)	2= 4	1= 2	1= 2	1= 2	3= 6	8=16
Between 3 and 5 (frequency x 4)	1= 4	1= 4	1= 4	1= 4	1= 4	5= 20
Between 6 and 7 (frequency x 6.5)	2= 13	1= 6.5	0= 0	1= 6.5	0= 0	4= 26
Between 8 and 10 (frequency x 9)	0= 0	0= 0	0= 0	0= 0	0= 0	0= 0
Between 11 and 15 (frequency x 13)	1= 13	0= 0	0= 0	0= 0	0= 0	1= 13
Between 16 and 20 (frequency x 18)	2= 36	0= 0	0= 0	0= 0	0= 0	2= 36
Between 21 and 30 (frequency x 25)	0= 0	0= 0	0= 0	1= 25	0= 0	1= 25
More than 30 (frequency x 30)	1= 30	2= 60	0= 0	1= 30	0= 0	4= 120
Total	**16=100**	**10= 72.5**	**6= 6**	**8= 67.5**	**11= 10**	**51=256**
Mean	**6.3**	**7.3**	**1.0**	**8.4**	**0.9**	**5.0**
Median	**1.5**	**0.0**	**0.0**	**1.5**	**0.0**	**0.0**

K.2 Calculation of Mean of Tasting Fees Charged

Wine sub-region	Henderson/ Henderson Valley n=12	Kumeu /Huapai Waimauku n=6	Matakana/ Mahurangi n=4	South Auckland n=6	Waiheke Island n=9	Totals n=37
$2 or less (frequency x $1)	8= 8	4= 4	2= 2	4= 4	4= 4	22=22
$2.01 to $4.00	2=6	1= 3	1= 3	2= 6	3= 9	9=27

(frequency x $3)						
$4.01 to $6 (frequency x $5)	1=5	1= 5	1= 5	0= 0	1= 5	4=20
$6.01 to $8.00 (frequency x $7)	1=7	0= 0	0= 0	0= 0	1= 7	2=14
$8.01 to $10.00 (frequency x $9)	0= 0	0= 0	0= 0	0= 0	0= 0	0= 0
more than $10 (frequency x $10)	0= 0	0= 0	0= 0	0= 0	0= 0	0= 0
Total	**12=26**	**6=12**	**4= 10**	**6=10**	**9=25**	**37=83**
Mean	**$2.16**	**$2.00**	**$2.50**	**$1.66**	**$2.77**	**$2.24**

K.3 Calculation of Mean and Median of Percentage of Sales Made to Winery Visitors in the Auckland Wine Region

Wine sub-region	**Henderson/ Henderson Valley n=16**	**Kumeu /Huapai Waimauku n=10**	**Matakana/ Mahurangi n=6**	**South Auckland n=8**	**Waiheke Island n=11**	**Totals n=51**
Less than 5% (frequency x 2.5)	1= 2.5	2= 5.0	0= 0	2= 5.0	0= 0	5= 12.5
Between 6% and 10% (frequency x 7.5)	1= 7.5	1= 7.5	0= 0	0= 0	0= 0	2= 15.0
Between 11% and 15% (frequency x 12.5)	3=37.5	3= 37.5	1=12.5	1=12.5	0= 0	8=100
Between 16% and 20% (frequency x 17.5)	5=87.5	1=17.5	1=17.5	1=17.5	2=35	10=175
Between 21% and 25% (frequency x 22.5)	1=22.5	1=22.5	1=22.5	2=45	3=67.5	8=180
Between 26% and 30% (frequency x 27.5)	2=55	1=27.5	0= 0	0= 0	2= 55	5=137.5
Between 31% and 40% (frequency x 35)	1=35	0= 0	0= 0	0= 0	1= 35	2=70
Between 41% and 50% (frequency x 45)	1=45	1=45	1=45	0= 0	1=45	4=180
Between 51% and 60% (frequency x 55)	0= 0	0= 0	0= 0	1=55	0= 0	1= 55
Between 61% and 70% (frequency x 65)	1=65	0= 0	1= 65	1= 65	0= 0	3=195
Between 71% and 80% (frequency x 75)	0= 0	0= 0	1= 75	0= 0	1= 75	2=150
Between 81% and 90% (frequency x 85)	0= 0	0= 0	0= 0	0= 0	1= 85	1= 85
Between 90% and 100% (frequency x 95)	0= 0	0= 0	0= 0	0= 0	0= 0	0= 0
Total	**16=357.5**	**10=162.5**	**6=237.5**	**8=200**	**11=397.5**	**51=1355**
Mean	**22.34%**	**16.25%**	**39.58%**	**25.00%**	**36.13%**	**26.56%**
Median	**18.00%**	**13.33%**	**20.00%**	**20.00%**	**22.50%**	**21.60%**

Appendix L - Time-line of the Development of New Zealand's Wine Industry

1819 - The first recorded plantings of grapevines in New Zealand in 1819 was at Keri Keri in the Bay of Islands, Northland. Holding the firm belief that the steps on the way to the civilising effect of Christianity for Maori included both agriculture and handicrafts Samuel Marsden, an Anglican missionary, planted one hundred vines imported from Sydney. There is no record of any wine having been produced from these original plantings (Cooper, 1996).

1832 - Arriving in New Zealand during 1832 Busby planted a vineyard at Waitangi. Vines sprouting in a small vineyard between the Resident's house and the flagstaff produced minuscule quantities of wine. The French explorer Dumont d'Urville, visiting Busby in 1840 noted that he observed

> a trellis on which several flourishing vines were growing ... with great pleasure I agreed to taste the product of the vineyard that I had just seen. I was given a light wine, very sparkling, and delicious to taste that I enjoyed very much. Judging from this sample I have no doubt that vines will be grown extensively all over the sandy soils of these islands and very soon New Zealand wine may be exported to English possessions in India. (cited in Scott, 1964, p. 16).

1835 - Darwin in 1835 while on his around the world voyage in H.M.S. Beagle landed at Keri Keri and noted that vines were flourishing a few miles inland at Waimate North and were being attended by Maori attached to the Mission (Thorpy, 1971).

1835 - 1839 Another earlier pioneer of grape growing in New Zealand was William Powditch who planted a vineyard at Whangaroa between 1835 and 1839. Facing the climatic difficulties of high wind speeds, low sunshine hours during the ripening period together with a constant battle with weeds, rats, insects and birds this early viticulturist eventually gave up the battle to become a provincial politician in Auckland. Faced not only with the problems noted by Powditch together with the arrival of oidium - a powdery mildew from America which destroyed many European vine strains during mid-century - most of the colonists abandoned their viticulture pursuits to non-British arrivals in the new colony (Hadyn and Talmont, 1997).

1838 - Bishop Pompalier of Lyons, the first Catholic Bishop of the South Pacific brought French vine cuttings to the Hokianga in 1838; thereafter as new French missions were established vines were planted to supply the priests with sacramental and table wines (Cooper, 1996). From 1838 thirty-six priests and lay brothers of the Marist order arrived in New Zealand at the bidding of Pope Gregory XVI. As well as the Hokianga, vineyards were established up the Whanganui River, in Poverty Bay and at Hawkes Bay (Scott, 1964). While the Fathers gained a spiritual foothold in these remote areas so to did the vine battle the dense New Zealand bush on the edges of the Maori settlements now converted to Catholicism. These seemingly indiscriminate plantings led to the establishment of New Zealand's oldest continuously managed vineyard - Mission Vineyards of Taradale owned by the Greenmeadows Mission Trust Board (The Press, 2002; The Dominion, 2002; Brimer, 1993).

1842 - The Hon. Henry William Petrie, a New Zealand Company propagandist planted a trial area of one hundred vines in the Wellington region at Port Nicholson. In a booklet publicising the area Petrie noted in 1842,

> ...from the nature of the climate at Port Nicholson there can be no doubt as to the ultimate success of the vine... (Petrie, 1842, p.1).

1845 - In 1845 Busby's vineyard was partly destroyed by both Hone Heke's men as well as British troops camped near by (Scott, 1964). Grapes were now growing in many locations in the North Island. Polack noted that

> At present (1838) grapes are largely cultivated to the northwards of the River Thames and the Kaipara (Polack, 1838, p.12).

1845 - Other New Zealand publicists joined this theme in order to attract further immigrants to New Zealand. Walter Brodie in a pamphlet *Remarks on the Past and Present State of New Zealand*, wrote in 1845,

> New Zealand in a few years will export much wine. The vine grows very luxuriantly, and the few hundred of Germans who have lately gone out, have turned their attention to the vine alone. (Brodie, 1845, p.4).

Lured by the exaggerated claims of the New Zealand Company propagandists and others, immigrants from the vineyard areas of both France and Germany began arriving in New Zealand.

1845 - Akaroa in 1845 - surrounded by steep hills, covered in rain forest, infested with impregnable undergrowth - witnessed the disembarking of thirty, shirtless French peasants. Most of these settlers were from the depressed wine districts of France anxious to make a new start in *Nouvelle-Zélande*. Land was cleared, vines planted and eventually rivulets of wine were produced for trading with visiting French whalers. British settlers encroached upon Banks Peninsular wresting land from Maori owners; by 1895 the vineyards of Akaroa and the antipodean version of the rural French way of life had all but disappeared (Hadyn and Talmont, 1997).

1862 - An exception to the disillusionment with viticulture by the British settlers was the Levett family. Taking up land at Wellsford, the Levetts experimented with and later followed in the footsteps of Busby by establishing New Zealand's second commercial vineyard in 1862. The wines produced, mainly Port, Sherry and Madeira, all unfortified but matured for five years in oak, were mostly shipped to Auckland for sale (Scott, 2002).

1865 - In 1865 Jose Soler, a Spanish wine-maker, planted vine cuttings along the upper reaches of the Whanganui River. Soler planted what is now recognised as being the first truly successful commercial vineyard in New Zealand. Soler produced a wide range of wines. They were generally matured for eight years without the use of sugar in the fermentation process. Soler's wines marked New Zealand's first successes at international wine competitions. According to Scott (1964), Soler's wines took six prizes at the Melbourne International Exhibition in 1880. Again at the London Colonial and Indian International Exhibition in 1886 his wines were placed third in competition with entries from all of the colonies, including South Africa. Initially three gold medals were won by Soler at the Christchurch International Exhibition in 1906, but later following protests by established Australian wine-makers a replacement judge, considered by the Australian contestants to be "acceptable", revised the earlier placings by awarding Soler all five available gold medals. In 1900, Soler's nephew Jose Vidal, also trialed grape growing unsuccessfully at Hokowhitu in Palmerston North. Later he moved his family to Hawkes Bay and in 1905 commenced what is now known as the Vidal Estate in Hastings.

1870 - By 1870 a number of immigrants from German wine producing areas had arrived in New Zealand. One of these Heinrich Breidecker, initially planted a vineyard at New Plymouth, moving later to the Hokianga. At Kohukohu the Breidecker family planted a vineyard producing an excellent wine style similar to Rhine wines. Prizes for Hock were won at the Dunedin Exhibition by the family (Hadyn and Talmont, 1997; Scott, 1964).

1880 - Israel Wendel from Alsace-Lorraine planted his first vineyard in Grey's Avenue in central Auckland. The *Colonial Wine and Champagne Factory* moved to

Symonds Street during the 1880's when *Wendel's Wine Bodega* also opened in Karangahape Road. This was the first licence for a wine shop ever to be issued in New Zealand. Wendel's daughter Brunetta continued the business after her father's death in 1895 (Scott, 2002). Following the success of these European immigrants, other landowners were now encouraged to venture into viticulture.

1883 - One of these landowners willing to diversify into viticulture, was a wealthy land-owner William Beetham. Having spent four years in France, Beetham upon returning to New Zealand planted three hectares of vines in Masterton. In his vineyard, Beetham experimented with plantings of varieties not previously planted in New Zealand such as Pinot Noir, Pinot Meunier, Hermitage, Black Hamburgh, Black Muscat, Golden Chasselas and Doradillo. Thus, after 1900, the history of wine-making in New Zealand no longer consisted of isolated experiments.

1892 - In 1892 Bernard Chambers planted the first vines on his sheep and cattle property at Te Mata in Hawkes Bay - Mamelon as the original vineyard was known is now part of the Te Mata Estate. The history of the Te Mata vineyard encompasses the history of New Zealand's finest wines commencing with Chamber's idealistic first plantings to commercial success and eventually to international recognition for some of the country's finest wines (Stewart, 1997).

1892 - Wine-making now became a profitable business to be undertaken by a number of landowners (Scott, 1964). The New Zealand Department of Agriculture was established in 1892. At that time the services of a viticultural adviser was sought. Appointed as a consultant was an Italian born viticulturist, Romeo Bragato (Thorpy, 1971). Bragato recommended firstly, that a technical college of viticulture be established under the supervision of the Department of Agriculture. His second recommendation was for the creation of wine-makers' co-operatives in each district, similar to the co-operatives being established at the same time by the dairy industry (Bragato, 1895). The first recommendation was disregarded, but the second led to the establishment of the North Auckland Vine Growers Association as well as the Central Otago Vine and Fruit Growers Association. Although these co-operatives helped distribute European cuttings and facilitated experimentation with varieties best suited to each district, the main objective of a common winery for joint wine-making was never achieved (Thorpy, 1971).

1893 - The disease that twenty years earlier had decimated vines in the wine producing countries of continental Europe (Paul, 1996), had in 1893 spread to New Zealand. Although phylloxera had been suspected since 1885, only in 1895 was its existence positively identified by Romeo Bragato. He advised the New Zealand Government that the only course of action was to destroy diseased vines and to replace them with imported American disease-resistant vines. Resistant root- stock could then be grafted with the desired European bud-wood (see Appendix B). Initially the hope was that these measures could be implemented on a voluntary basis but because the government omitted to offer financial incentives many viticulturists ignored the recommendations. Accordingly the government of the day imposed compulsion by utilising a team of inspectors to enforce the destruction of infected vines. Many of the vineyards were replanted with new hybrid, disease resistance vines (Paul, 1996). Due to the expense, many viticulturists omitted to graft classical varietal European bud-wood on to the new plantings. As a result although the quantity of grapes produced increased markedly, the wine quality became notably inferior (Cooper, 1996).

1896 - Immigrants from the Dalmatian coast of Croatia, working in the gum-fields of Northland commenced planting their first vines and thus began the long tradition of Dalmatian winemaking in New Zealand.

1897 - The Te Kauwhata Viticulture Research Station was established in 1897 by the Department of Agriculture. This operated as a training establishment for instruction in viticulture and wine-making.

1902 - Romeo Bragato returns to New Zealand and accepts the post of government viticulturist based at the research station at Te Kauwhata. Bragato, regarded by many as being the equal of Busby in the wine industry's development, resigned his position as government viticulturist and left New Zealand for Canada in 1909 (Scott, 1964).

1902 - Assid Corban, an immigrant from Lebanon establishes a vineyard, which he called Mt. Lebanon Vineyards, in Henderson, Auckland.

1903 - 1919 Fostered by Christian fundamentalism together with the temperance activities of the recently successful women's suffrage movement towards the end of the nineteenth century, prohibition began to surface in New Zealand. The growth of this movement during the first part of the twentieth century greatly affected the wine industry's development for many years. By the end of 1918 the Government had made it clear that there would be no compensation to industry members, if prohibition was introduced as a result of the referendum to be held at the time of the General Election of 1919. A number of wine-makers became discouraged by the creation of a number of no-license districts turning instead to other agricultural pursuits (Robinson, 1997a; Cooper, 1996). The 1919 General Election initially returned a domestic vote in favour of prohibition but the votes of overseas servicemen, when eventually counted, reversed this decision. Victory was only partial however, as those in the Temperance Movement continued to exert enormous pressure over successive governments for a number of decades resulting in laws aimed to restrict the marketing opportunities of the industry (New Zealand Herald, 2002b; Stewart, 1997).

1917 - German immigrant Friedrich Wohnsiedler, in spite of the anti-German sentiment of the times, established a vineyard (Wohnsiedler) at Waihirere - the first commercial vineyard planting in Gisborne.

1919 - Josip Babich moved from Northland to Henderson - where he established a vineyard - thus founding Babich Wines one of New Zealand's most successful wine-makers.

1920 - 1929 Following the phylloxera scare around the turn of the century many grape growers chose to plant American hybrid vines rather than grafting *vinifera* budwood to resistant rootstocks. Hundreds of hectares of hybrid varieties such as Baco 22A and various Siebels (unworthy even of a name, they were merely numbered) were planted. Although these produced huge crops, the resultant musts were suitable only for the bulk production of low-cost fortified wines such as antipodean versions of "sherry" and "port". This style of wine-making, encouraged by the Government of the day, largely replaced the table wines produced by some of New Zealand's earliest wine-producers (Cooper, 1997).

1927 - Tom McDonald, aged 19 years, purchases the Taradale property of his employer, Bartholomew Steinmetz. McDonald goes on to become one of New Zealand's foremost pioneer wine-makers of fine wines. He later sells out in 1944 to Ballins Breweries of Christchurch.

1930's - New waves of Dalmatian immigrants settle in West Auckland establishing further vineyards there.

1930 - 1945 Protectionism surfaced as a key part of Government policy during the 1930s and 1940s. The quantity of imported wines and spirits was slashed. Bolstered by the insatiable demand of American servicemen stationed in New Zealand during the war years production of fortified wine diluted with water, but sweetened with sugar soared. The sale of this "plonk" led to vast profits being made by New Zealand wine producers.

1933 - Robert Bird establishes Glenvale in Esk Valley - now New Zealand's fifth largest wine producer.

1934 - Ivan Yukich establishes a tiny vineyard he calls Montana amongst the hills of Titirangi - now New Zealand's largest wine producer.

1943 - Nikola Nobilo from the island of Korcula in Dalmatia plants vines in Huapai and in doing so lays the foundation of Nobilos.

1946 - A Royal Commission of Enquiry in 1946 reported that 60% of New Zealand made wine suffered from bacterial disorders (Cooper, 1997; Fairburn, 1948).

1947 - Nikola and Vidosava Delegat established Delegats, today one of New Zealand's most prominent wine producers.

1947 - 1965 Changes in liquor licensing regulations during the late 1940s and early 1950s (see Chapter 8) led to falling prices and increased demand. Investment by Australian companies in this lucrative but protected industry soared. In 1960 New Zealanders on average consumed just under two litres of wine compared to a remarkable one hundred and twenty seven litres of beer; traditional brown draught beer was still king (Saunders, 1998).

1961 - George Fistonich starts Villa Maria in Mangere, Auckland - now New Zealand's largest family owned wine producer.

1966 - 1970 In common with their Australian cousins the wine palates of New Zealanders began to reflect a new sophistication during the late 1960s and early

1970s. A number of reasons have been cited for these changes:

- The migration to New Zealand of thousands of continental Europeans.
- Increasing levels of overseas travel by New Zealanders.
- The delayed war effect - many returned servicemen had served in the traditional vineyard areas of Europe and were now able to afford for the first time, the wine styles which they had earlier tasted during the war years.
- An expanding restaurant sector.
- Increasing disposable income.
- Continuing liberalisation of liquor licensing laws reflecting a changing society gradually abandoning its past conservatism (see Section 8.1 of Chapter 8)

(Halliday, 1998; Saunders, 1998; Cooper, 1997; Halliday, 1996).

1971 - 1984 Consumer tastes had by now swung towards table wine; vineyard areas tripled during the 1970s. Müller-Thurgau ruled supreme in New Zealand's vineyards as avid consumers rushed to adapt to its sweetish fruity style. By 1983 this vine represented almost 50% of plantings - occupying an area almost four times greater than its nearest rival.

1985 - 1986 By 1985/1986 New Zealand was awash in cut-price locally produced wine. Receiverships and liquidations of the protected wine producers embarrassed the Labour Government, which had in its latest budget doubled the excise duty on a bottle of wine (see Table A.17 of Appendix A) (Cooper, 1997; Mikic, 1998).

1986 - 1990 The Government's eleven million dollar vine-pull scheme of 1986 marked the beginning of the current phase of the wine industry in New Zealand. Throughout the country 1,517 hectares of vines, mainly Müller-Thurgau but including some of the remaining hybrids, were ripped out and burned. Simultaneously tariff protection was gradually reduced and by 1995 wine became freely tradable between Australia and New Zealand. Plantings of classic varieties expanded rapidly during the late 1980s and continues until this day (Cooper, 2002).

At last, New Zealand, the latest country in the world to be planted with *Vitis vinifera*, had begun to develop its own unique styles of fine wines. Beginning with their herbaceous Sauvignon Blancs and then following with oaked malo-lactic fermented Chardonnays, New Zealand wine producers are currently intent on producing equally fine distinctive wines based on the classic Bordeaux grapes of Cabernet Sauvignon, Merlot, Cabernet Franc and Malbec (Robinson, 1997b). In the future, hopes are held even for Pinot Noir, one of the classic grapes of Burgundy, long recognised as the most difficult variety to produce fine wines from, when planted away from its spiritual home (George, 1996).

1986 - 2003 The Rise of the Boutique Wineries. Within the literature, although they are frequently referred to, there is no adequate definition as to what exactly constitutes a "boutique winery". James Halliday refers to "boutique wineries" as being weekend/holiday or retirement ventures (Halliday, 1994). Brimer even uses the term in the title of his descriptive book (Brimer, 1993) but neglects to even attempt a definition of the principal subject of his writing. New Zealand WineGrowers, in its 2003 annual report, although avoiding the term "boutique wineries" classifies its members into three classes:

- Category 1: Grape Wine Sales not exceeding 200,000 litres.
- Category 2: Grape Wine Sales of between 200,000 - 2,000,000 litres.
- Category 3: Grape Wine Sales in excess of 2,000,000 litres.

(New Zealand Wine Growers, 2003)

As membership of this Institute is compulsory for all New Zealand wine-makers, category one members, although clearly including wineries far beyond Halliday's restricted definition, is possibly a good starting point .

Small wineries have always existed in New Zealand, particularly in the north of the country (Cooper, 1997). The boutique influence on the number of wineries is revealed in the growth of members of the Wine Institute of New Zealand (now New Zealand WineGrowers (see Table A.5 and Table A.6 of Appendix A). Clearly the number of wine-makers licenses do not equate exactly with the actual number of wineries as several licenses may be held by one individual group of winery companies. For example in 2002 there were eighty-nine wine-makers licenses attributed to the Auckland region (see Table A.5 of Appendix A) but only sixty-six individual wineries (see Appendix D).

There are a number of reasons for the huge increase in the numbers of boutique wineries in New Zealand:

- Many professional people (Example: doctors, lawyers, accountants) had both surplus discretionary income and the motivation to engage in this activity.
- The taxation advantages as well as the prospect of exempt capital gains were well known to this professional group who also had the ability to influence others to enter the field as well.
- The dissemination of practical knowledge became more widely available with both Massey and Lincoln Universities initiating relevant courses.
- The table wine boom - originating with white wine but extending more recently to the reds as well.

In common with Australia (Rankine, 1996), the number of small wineries throughout New Zealand has increased dramatically in recent years becoming a distinguishing feature of the country's wine industry.

1995 - 2003 Industry Consolidation and Rationalisation. During the latter part of the 1990's and continuing on into the present decade New Zealand's wineries, faced with a static domestic market, have increasingly become reliant upon exports to absorb their burgeoning production. A desire by aging family founder-shareholders to liquidate their holdings, together with an initial thirst by local and more latterly overseas investors to become involved with a seemingly prosperous New Zealand export activity, in spite of fluctuating exchange rates (The Daily News, 2002), has led to a measure of rationalisation. Such rationalisation is centred around oenology expertise and the established wine marketing channels of the new investors as well as a growing respect for particular New Zealand wine varietals in overseas markets (Example: Marlborough Sauvignon Blanc). The Overseas Investment Commission (OIC) approved 46 transactions in 2002 totalling a little over two thousand hectares of vineyard land. In 2001 there were 45 such transactions totalling approximately three thousand five hundred hectares (Sunday Star Times, 2003). Instances of such consolidations and rationalisations are:

- In 1998 the Kumeu based Nobilo purchased Selaks also of Kumeu but with extensive vineyards and a new winery in Marlborough. The large listed

Australian winery BRL Hardy initially purchased a minority interest in the publicly listed Nobilo Wines Limited. By 2000 the Australian company purchased the remaining shares owned by the New Zealand public and the Nobilo family for NZ $30M.

- In 2000 Fosters Brewing Group of Australia purchased a controlling interest in Matua Valley Wines Limited from the Spence family for an amount of NZ $11M - the takeover to be completed in 2004.
- In 2001 Cloudy Bay of Marlborough sold a majority holding to Veuve Clicquot, the illustrious wine producer, of Champagne, France.
- In 2002 the UK based Allied Domecq PLC, the world's second largest spirits and wine conglomerate, completed its takeover of New Zealand's largest wine producer Montana. The purchase of those shares not already owned for a little over NZ $1B was achieved only after a fierce battle with Lion Nathan, a giant Australasian brewer.

From the Australian owned Craggy Range Winery of Hawkes Bay, to the Swiss owned Froman Winery of Marlborough; from the German based Giesen winery of Canterbury to the American owned Tasman Bay Winery of Nelson; international ownership of New Zealand wine producers has now become quite common place throughout the country (New Zealand Herald, 2003; Cooper, 2002).

Appendix M - Miscellaneous Figures

Figure M.0 - Producing Vine Area in New Zealand

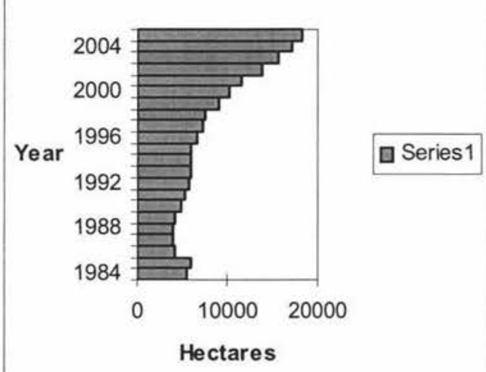


Figure M.1 Production of New Zealand Wine

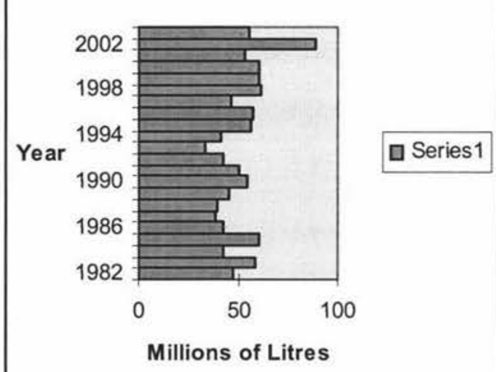


Figure M.2 Number of Wineries in New Zealand

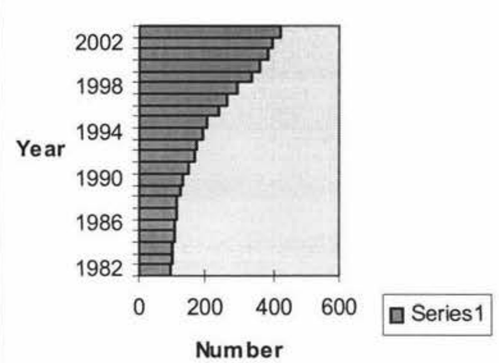


Figure M.3 Domestic Sales of New Zealand Wine

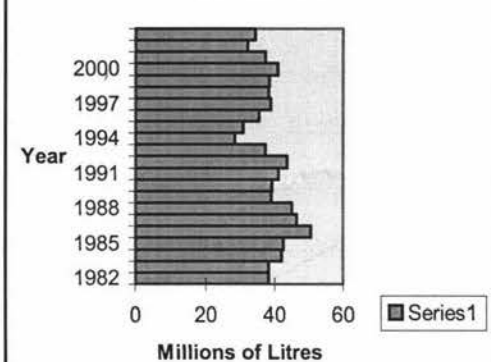


Figure M.4 - Wine Imports Into New Zealand

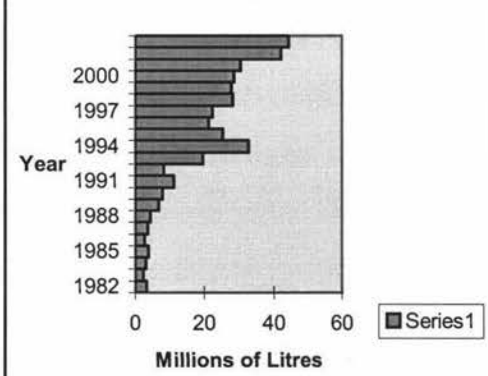
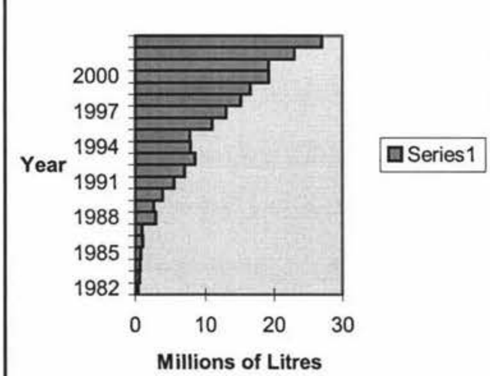
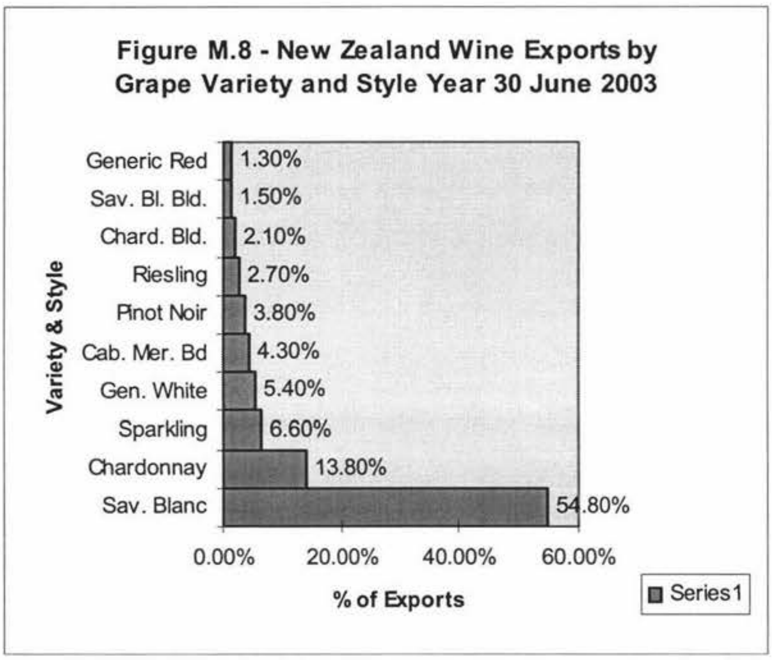


Figure M.5 - Wine Exports from New Zealand

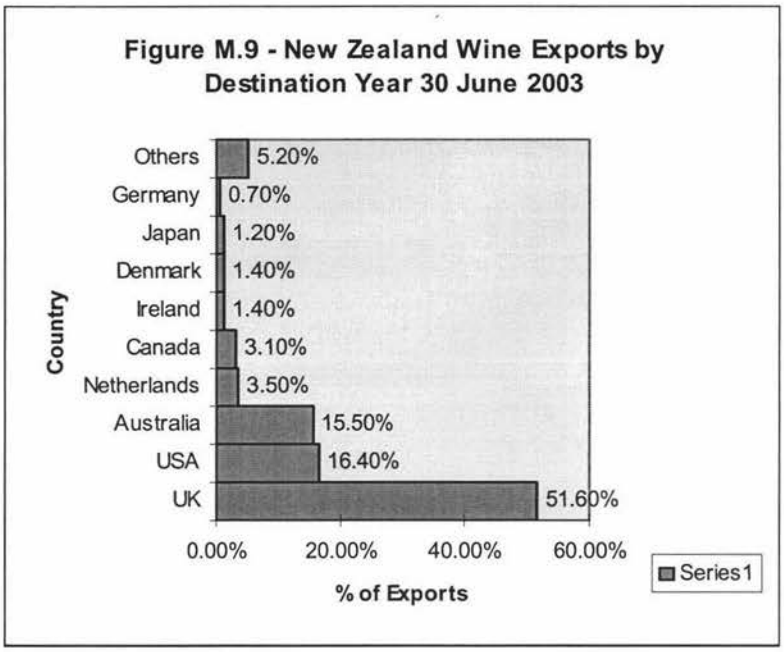


(Source: New Zealand WineGrowers (adapted), 2003; Statistics New Zealand (adapted), 2003b).

(Source: New Zealand WineGrowers (adapted), 2003; Statistics New Zealand (adapted), 2003b).



(Source: New Zealand WineGrowers (adapted), 2003; Statistics New Zealand (adapted), 2003b).



(Source: New Zealand WineGrowers (adapted), 2003; Statistics New Zealand (adapted), 2003b).