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The cellar door report: Margaret River Region winery / tourism research

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The Cellar Door Report

Margaret River Region Winery/ Tourism Research

Conducted for

The Margaret River Wine Industry Association
&
The Augusta Margaret River Tourism Association

by

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We would like to extend our thanks to Pauline McLeod, Conor Lagan, the staff of the Augusta-Margaret River Tourist Bureau, the owners and managers of the wineries that participated in the focus group, the owners/managers and their cellar door staff that assisted in distributing the questionnaires and the proprietors of the accommodation houses that participated in the interviews. This support and assistance was very much appreciated.

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Executive Summary

The Margaret River tourist is a well educated, professional person who visits the region to tour the wineries, enjoy the scenery and the beach, relax and go to the restaurants. The tourist considers the wineries one of the prime tourist destinations in the region and goes to the wineries primarily to taste and buy wine.

Most people visit the region in small groups and stay for 2-3 days. The visitor is likely to be from Perth although 12% are from regional Western Australia, 29% from interstate (mainly NSW or Victoria) and 9% are international visitors. Although the tourist residence may be Sweden, Sydney or Bunbury there is no significant difference in visitor ratings of the wineries, the wines or the availability of tourist information. Most visitors are likely to return to the region, especially those from Australia.

Of the winery visitors approximately one in five do not purchase wine on a regular basis if at all, and one in four did not purchase wine at the cellar door. Of the visitors to the cellar door, half patronised winery restaurants, one in three purchased local produce and arts and crafts and only 15% purchased souvenirs.

Most visitors consider Margaret River region wines to have good to very good taste and quality but 28% viewed the value and 46% perceived the price of Margaret River wines as fair to poor. This perception of poor price was reflected across all respondents and is not restricted to non-wine purchasers. It should be noted that many of the people that rated the price as poor still purchased wine at the cellar door. This apparent contradiction may mean that while price is considered high the wine is still viewed as reasonable value, that is good quality wine for a high price. In the interviews conducted some people stated that they purchase wine from interstate rather than Margaret River because they felt the interstate wine was of equal quality but for a lower price hence was considered to be better value. This was a small group but they are regular wine purchasers, regular Margaret River visitors, belong to wine clubs and appeared to have a reasonable knowledge of wines.

Service at the wineries was rated highly although in the interviews with visitors and accommodation house proprietors the same glowing reports were not so forthcoming. The researchers consider this is an area deserving further examination by individual winery managers.

The tasting fee is a point of contention requiring careful consideration by individual wineries. One third of visitors stated they probably would not or definitely would not visit the winery if a tasting fee was introduced. These respondents are regular wine purchasers that spend up to $200 at the cellar door and up to $200 per month on wine. This aversion to the tasting fee was also reflected in the interviews and a concern expressed by several winery owners and managers participating in the focus group discussion.

The tasting fee is potentially a major consideration for wineries wanting to cover the costs associated with offering wine tasting at the cellar door but it may be impractical for small wineries. For major wineries that have too many visitors in the peak tourist season and may be forced to turn some visitors away, a tasting fee may be an answer to reducing the number of people that want to visit the winery. The fee could be charged only during the heavy tourist season as a measure to sort the serious wine taster and buyer from those using the wineries as merely a source of entertainment and have little or no intention to purchase. It should be noted that by introducing the fee, no matter what the size of the winery, it will not only reduce the number people visiting but also potential consumers.

The majority of winery visitors are interested in wine but only half consider themselves knowledgeable about wines. This perceived lack of knowledge and the expressed need for wine tasting notes presents an opportunity for wineries to offer more information to cellar door visitors and to create databases for direct mail. Such databases have had brilliant success for small business in building customer relationships, brand loyalty and if incorporated into a strategic plan can amount to a competitive advantage.

These databases can be used in the distribution of a wine industry and/or winery newsletter or the development of wine clubs which would provide opportunities for wineries to create another marketing channel. This may be very relevant for the small and medium winery as the database can be developed at little cost and can provide an additional means of distributing their wines. For the larger wineries the database provides an excellent knowledge of clientele and contributes to the creation of a loyal customer group. The development of the databases could be an individual winery initiative, a winery association initiative or a joint tourism and wine industry association initiative.

The cost of developing information and promotional materials for individual wineries can be reduced with the use of software packages as page maker or direct mail software and non-competing products can advertise together to share the costs.

The survey and the interviews indicated a total inadequacy of tourist information, with between 50% and 83% of respondents wanting more information on wineries, tasting notes, activities in the region, restaurants, accommodation, opening times and tourist information both interstate and internationally. This lack of information was reinforced by the main sources of information about the wineries being word of mouth and own knowledge.

The research revealed the existence of a very strong relationship between the wineries and tourism in the Cape-to-Cape Region. On the basis of these findings it is recommended that the wine industry and tourism associations focus on addressing the key weaknesses revealed in the study; the lack of promotional materials, the inadequate accessibility and distribution of existing material and the absence of clientele databases. These weaknesses can be overcome by putting into place an integrated promotional plan. The full details of the recommendations for the development of such a plan can be found in the recommendation section of the report however the key elements are:

1. Build a strong commitment amongst wineries in the Margaret River Wine Industry Association to the development of wine tourism in the region.

2. Develop an image for the wineries that will appeal to the winery tourist.

3. Develop a winery tour package with tours designed to suit selected target groups, their needs and demands. These tours may be in the form of 'winery trails' that can be developed in conjunction with tour operators and the tourist bureau.

4. Develop more appropriate promotional material to meet the expressed need for information revealed amongst visitors in the research. This is best provided in a single publication provided at little or no cost to the tourist.

5. Design the promotional material to reflect the image selected by the wineries. This material must appeal to the target group.

6. Utilise a wider range of methods for communicating information to tourists. This could include brochures, travel expos, radio, press, TV, direct marketing including newsletters and wine clubs.

7. To make information more readily accessible to visitors, establish a greater number of points of distribution for promotional material. Accommodation houses are currently greatly underutilised for distributing tourist and winery information to visitors already in the area. The origin of visitors is a major point to consider in targeting potential visitors. Material needs to be distributed in Perth regional areas of WA, interstate and overseas. Accommodation houses/hotels, tourist information centres, travel agencies, travel expos are al suitable avenues for distribution in these locations.

8. Utilise on-site signage and inhouse promotion to reinforce the winery image, to present a welcoming statement to visitors and to ensure visitors can easily locate tasting rooms.

9. Use your cellar door staff in designing the most suitable inhouse promotional material and to ensure the provision of information that is in greatest need. It is essential for managers to listen to cellar door staff because they are at the front line of the organisation, are in closest contact with cellar door visitors and understand consumer preferences, needs and dislikes. They are a very valuable source of consumer information.

10. Develop clientele databases. A valuable opportunity exists in this area for wineries and these databases give you a chance to develop customer relationships and build brand loyalty and repeat business. This is a cost efficient method of distributing information and can also be used as a direct selling channel.

These recommendations have been designed to meet the requirements of the cellar door visitors and to address the weaknesses identified by the survey. All of these aspects listed in the ten points above need to be integrated into a marketing strategy. In view of the complex interrelationships that exist between tourism and the wineries and because of the importance of this relationship in the region it is critical that the Augusta-Margaret River Tourism Association and the Margaret River Wine Industry Association work together in the development of this marketing strategy. This collaborative approach will provide for a more integrated and cost effective implementation of the strategy resulting in the greatest return for investment.

Wine Tourism in Augusta-Margaret River Region

Individually the tourism and wine industries are major contributors to the South West economy in Western Australia both having enormous growth potential. In 1992/93 tourism expenditure in the region was estimated at $230 million (SWDC 1989) with tourist numbers having grown at an average annual rate of nearly three percent over the past ten years (DCT and SWDC 1996). The wine industry was worth around $35 million , producing nearly half the state's annual total value of wine production in 1996 (DCT 1996).

In recent years the tourism industry in the Cape to Cape region has flourished because of the development and growth of a high quality wine industry with its wineries offering a major tourist attraction. The establishment and development of a variety of predominantly small and medium sized wineries and the growth of tourism in the region have been strongly intertwined. Winemakers and wineries are beginning to see themselves as an important element in the tourism industry and a significant asset to the region with some even suggesting that the growth and development of the tourism industry in the area would have been considerably lower in their absence.

While the linkages between the wine industry and tourism are difficult to quantify due to the complexity of the relationships and the two-way flow of effects, it is recognised that substantial benefits are to be derived from increasing cooperation between these two sectors of the local economy. Opportunities exist for wineries to capture a greater share of the tourist dollar through increased collaboration between themselves and tourism operators, the upgrade of cellar door facilities, enhancement of tourism services at the cellar door and cooperative marketing efforts fostered by industry associations. By improving the understanding amongst the various players comprising the wine and tourism industries of the ways in which their activities are interrelated an opportunity exists for working together for mutual benefit.

Wine tourism in Australia is currently valued at approximately $400 million with a potential value of $1100 million. Victoria has lead the way in promoting wine tourism as a niche market in Australia. Cooperative promotion and marketing efforts between Tourism Victoria and the Victorian Wineries Tourism Council has contributed to Victorian wineries attracting 1.9 million visits in 1994/95, an increase of almost 16 percent over the previous year, generating in excess of $100 million to the Victorian economy. This level of industry growth has motivated wineries to extend their cellar door operations to include food with some offering specialised quality menus to complement their wines and accommodation (Tourism Victoria 1995).

The Cape to Cape region is the most developed tourism area in the South West and with its thriving wine industry has comparative advantages in:

- wineries producing premium quality wines gaining international recognition
- beautiful coastline and world renowned surfing beaches
- national parks, unique forests and spectacular rural scenery

- extensive natural and man-made recreational activities (eg caving, fishing, diving)
- cultural events (eg Leeuwin Estate concerts and wine festivals)
- high quality local arts and crafts
- relaxed rural lifestyle and rural setting
- proximity to the state's capital city

These comparative advantages form the basis for winery and tourism related enterprises to work together to develop packages of new wine tourism products targeting selected tourist market segments.

Much of the recent resurgence of the wine industry can be attributed to the development of wine tourism. Despite its growing importance and significance to many rural regional areas, little research exists on wine tourism and winery visitors. Tim Dodd (1995) in his research of the Texas wine industry examined the pros and cons of cellar door sales and the development of wine tourism. Amongst the advantages identified were:

- Opportunity for customers to try new and little known products at little or no cost
- Building brand loyalty
- Opportunity for increased margins
- Alternative distribution outlet (particularly significant for small wineries with no established reputation)
- Source of marketing intelligence for existing and new release wines i.e. feedback from cellar door visitors
- Educational opportunity in a non-threatening environment to develop wine appreciation, create awareness and improve knowledge on wines and the wine industry

These advantages are countered to some degree by increased costs and capital requirements, high dependence on cellar door sales limiting growth opportunities and greater time management requirements.

A better understanding of cellar door visitors would enable winery proprietors and owners of other tourism related enterprises typically associated with the tourist segment that visits wineries to develop specialised tourism products tailored for this market segment and better marketing programs. It is towards this end that this cellar door marketing survey was conducted in the Augusta-Margaret River region.

In relation to the role of structures and organisations in the economic development process of local areas, Richard Kirwan (1987) identified, amongst other strategies, fostering cooperation between existing businesses and supporting product development as proactive measures to stimulate local economic development and employment growth. It is within this context that the August-Margaret River Tourism Association in collaboration with the Margaret River Wine Growers Association successfully attracted a substantial government grant and took the initiative to research the relationships between tourism and the wine industry in the region.

The grant was used to conduct a survey of Margaret River Region visitors and the tourism product. The survey was conducted between September 1996 and January 1997.

The objectives of the survey were to :

- improve the understanding of the visitor to the cellar door of wineries.

- identify ways in which the wine and tourism industries can better integrate their marketing and promotional efforts to improve the delivery of the tourism 'product' for mutual benefit.

- identify the information needs of cellar door visitors.

- identify the value of tourist centres, as a source of visitor information and promotion, to the wine industry in Margaret River.

The objective to identify the extent to which the current 'tourism product' offered by wineries in the Margaret River Region meets the needs of the visitor was completed in a separate survey. The full results of this survey are presented in a separate report titled "The Wine Tourism Product in the Cape-to-Cape Region of Western Australia".

Methodology

The wine tourism research study commenced in August 1996 with a series of preliminary discussions between the principal researchers and representatives from the tourism and wine industries in the Margaret River region. The purpose of these discussions was to define the scope of the study and to agree on the direction and approach it would take.

On the basis of these discussions it was decided that the principal researchers would undertake an extensive survey of cellar door visitors and this would be supplemented by a survey of winery owners and mangers to be conducted by a group of Marketing Research students from Edith Cowan University (Bunbury Campus).

The primary purpose of the research of the wineries was to conduct an audit of existing and planned winery facilities in the Cape-to-Cape region with a secondary objective of establishing the opinions of winery proprietors towards various types of cellar door visitors and tasting fees. This research involved the conduct of a focus group discussion with winery owners and managers held on September 16 and a mail questionnaire to all wineries in the region that were members of the Margaret River Wine Industry Association. The report for this study was presented to the Augusta-Margaret River Tourism Association and the Margaret River Wine Industry Association in November 1996.

The research undertaken by the principal researchers was conducted in two major stages. Firstly, an exploratory study was carried out to reveal those factors on which to focus in the cellar door visitor questionnaire. This preliminary research was critical in ensuring the "right" types of questions were asked of visitors and that appropriate responses were incorporated into the survey questions.

The initial exploratory research involved discussions with a selection of proprietors from a range of accommodation houses in Margaret River, Yallingup and Dunsborough. Eight accommodation houses ranging from caravan parks and budget facilities through to upmarket accommodation were visited on September 3. Detailed personal interviews were conducted with the proprietors. Telephone interviews were carried out with a further 12 accommodation houses on September 4. The purpose of these interviews was to gain insight into the role these operators perform in disseminating information and promotional material to winery tourists and the characteristics of their guests. Close observation was also made of the range of winery literature available at the accommodation houses visited. Support was also obtained from 19 of the 20 accommodation houses to assist in securing participants for conducting focus group discussions.

Initially the researchers proposed to conduct two focus groups, one with tourists intending to visit the wineries and a second with tourists not intending to visit the wineries. The focus groups were scheduled to occur on September 7 and 8. The occurrence of low bookings at the accommodation houses at this time, the early departure of many guests on the Saturday morning and the tendency for incoming guests to not arrive at the accommodation houses until late afternoon on Saturday combined to prevent sufficient numbers of participants being secured to conduct the focus group sessions. It was therefore decided to undertake detailed personal interviews with visitors at the tourist bureau, cave entrances and the wineries. A total of 69 people were interviewed. Thirty four people were interviewed at the Augusta-Margaret River tourist bureau and the cave entrances on September 7. Another 35 people were interviewed at the cellar doors of four major wineries in the Margaret River and Dunsborough areas on September 14.

Through this process, the information gathered was used to develop the questionnaire for distribution at the cellar doors of participating wineries. To assist in clarifying the linkages between tourism and the wine industry in the region it was decided to produce a second version of the questionnaire for distribution through the tourist bureau. This second questionnaire incorporated a question designed to reveal the intentions of the general tourist to visit the wineries. This provided a basis for comparing opinions of the winery and 'non-winery' groups about the most important tourist attractions in the region and the role played by wineries in drawing tourists to the region.

The questionnaire developed was pilot tested at a selection of wineries on September 21. Preliminary analysis of the responses and reliability testing of the pilot survey was performed and modifications were made to the questionnaire on the basis of these results. The refined questionnaire was distributed to all participating wineries for implementation through the cellar doors during the week of October 7. An incentive prize of 6 bottles of Margaret River wines was offered to induce visitors to complete the questionnaire. The survey period was initially set for four weeks however low response levels resulted in this time being extended and subsequently a person employed to work with the cellar door staff to encourage visitors to respond. The survey period ran from October 12 until December 12 although a small number of questionnaires were completed and returned in the first week of January. These were included in the analysis.

Analysis

The questionnaire responses were analysed using the SPSSX social sciences statistical package. Extensive cross-tabulations, t-tests, anovas with significance tests and reliability tests were conducted on the data. This analysis provided insight into the existence of any differences amongst groups of visitors and the interrelationships amongst the factors that characterise them. The reliability tests indicated a minimum of 76% reliability for the questions tested which indicated the results from the questionnaire were reliable and dependable.

This approach assisted with providing insights into the relationships between the wineries and tourism and the development of a detailed profile and extra depth of understanding of the cellar door visitor. The findings of the personal interviews, which were more qualitative in nature, have been combined with the responses of the structured questionnaire to provide a more complete understanding of the visitors to the Margaret River wineries.

Results

The results are presented in two sections. Firstly an overview is provided of some of the key findings from the winery survey undertaken. This section identifies the nature of the services and facilities currently provided by the wineries in the region, the importance of sales through the cellar door and winery proprietor preferences for the various types of cellar door visitors. This is followed by a detailed presentation of the results of the consumer survey.

The Wineries Survey

The information gathered through the focus group discussion with winery owners and managers and the wineries survey conducted by the Marketing Research students at Edith Cowan University has provided a valuable picture of the nature of the wine tourism product currently offered in the Cape-to-Cape region. This research also provided insight to the relative importance of cellar door sales to wineries in the region and the types of cellar door visitors that the winery owners and managers would like to attract.

The Current Wine Tourism Product

The Margaret River Wine Industry Association currently has 42 member wineries with cellar door facilities. A large proportion of these wineries have developed an enhanced wine tourism product consisting of more than just cellar door tasting and sales of a wide range of premium quality wines. The typical winery offers cellar door tastings and sales, has wine packs on display, offers credit card purchase facilities, a delivery service and wine purchase by mail order, provides background music to create a more pleasant atmosphere and an exhibition of one type or another and has parking for large vehicles.

The audit of winery facilities and services conducted indicated that 43% of member wineries responding to the survey have a restaurant or cafe style eating facility, 71% offer some form of entertainment (mostly background music), 68% have souvenirs and local produce for sale, 55% sell arts and crafts, 64% provide exhibitions, 45% offer picnic/BBQ areas, 54% have public gardens and 45% provide attractions for children (playground, animals etc). Many others had such additions planned for their facility within the next five years. Only 18 percent however provide on site accommodation facilities with only one other planning this addition within the next five years.

This continued development of the wine tourism product in the Cape-to-Cape region by upgrading and enhancing the cellar door will enable wineries to capture a greater share of the tourist dollar.

The Significance of the Cellar Door

On average cellar door sales account for approximately 34 percent of sales revenue for wineries in the study area with 15 percent reporting this to be in excess of 80 percent of sales revenue. This result is consistent with trends elsewhere. For example a study of 32 Washington wineries revealed that 22 percent of all wine was sold through tasting rooms while a New York winery study found that 48 percent of wineries sold in excess of 60 percent of their production to cellar door customers (Dodd 1995). From this it can be seen that wine tourism in the Cape to Cape Region contributes substantially to wineries though potential exists for this to be expanded.

Attitudes and Preferences of the Wineries towards Visitors

Amongst the winery owners and managers participating in the focus group discussion held on September 16, strong support existed for the development of good working relationships and stronger linkages between the two industry associations and winery and tourism related business operators. Concern was expressed however over the lack of inter-regional cooperation particularly with neighbouring tourist destinations. This is particularly important in developing a consistent regional image, a uniformly high tourism product and integrated tourism experiences for visitors who do not recognise lines on a map.

There was a recognised need for both industries to work together to provide a community educational program to improve community understanding and appreciation of the value of wine tourism in the region in order to foster greater community support and build more positive attitudes towards tourism development in the region.

Wineries dislike being used by some visitors strictly as a source of 'entertainment' having no real interest in or intention to purchase wines. Large social groups of cellar door visitors are the most disliked group amongst winery owners especially when they arrive unannounced.

While the wineries recognise the everyday individual or small group cellar door visitors to be their primary and currently most lucrative customer, participants expressed a strong interest in working together to target the wine specific tour group market segment. Tour groups bring spill-over benefits as they tend to be large purchasers of souvenirs and local products sold at the wineries.

It was felt amongst wineries that a need exists for the development of off-season tourism packages to reduce problems associated with seasonality and coping with peaks in the wine tourism industry. Cooperation between a variety of wineries and tourism related operators (eg bushwalking tours, farmstays or B&Bs, restaurants, art and craft firms) to "package' specialised winter wine tourism products targeting tourists with the flexibility to travel in off-season periods and are seeking a relaxing nature-based or culture-based rural experience.

Smaller boutique wineries perceived themselves as 'hosts' to their cellar door visitors capitalising on the opportunity to provide their customers with 'an educational and enjoyable experience'. This was seen as an important strategy in developing visitor appreciation of wines and the wine industry and building brand loyalty.

The matter of introducing tasting fees proved to be a dividing issue amongst not only individual wineries but individuals within the same winery. Currently approximately half the region's wineries charge a tasting fee for groups of more than ten but 88 percent of winery owner/managers (mostly the smaller operations) consider such charges inappropriate for individuals and small group visitors. Twelve percent of wineries charge for all tastings with the fee discounted from any wine purchases made. These wineries reported that charges had not discouraged visitors to the cellar door with informal feedback from visitors indicating that many felt more comfortable trying the full range of wines and less obligation to purchase when they did not care for them.

The Consumer Survey

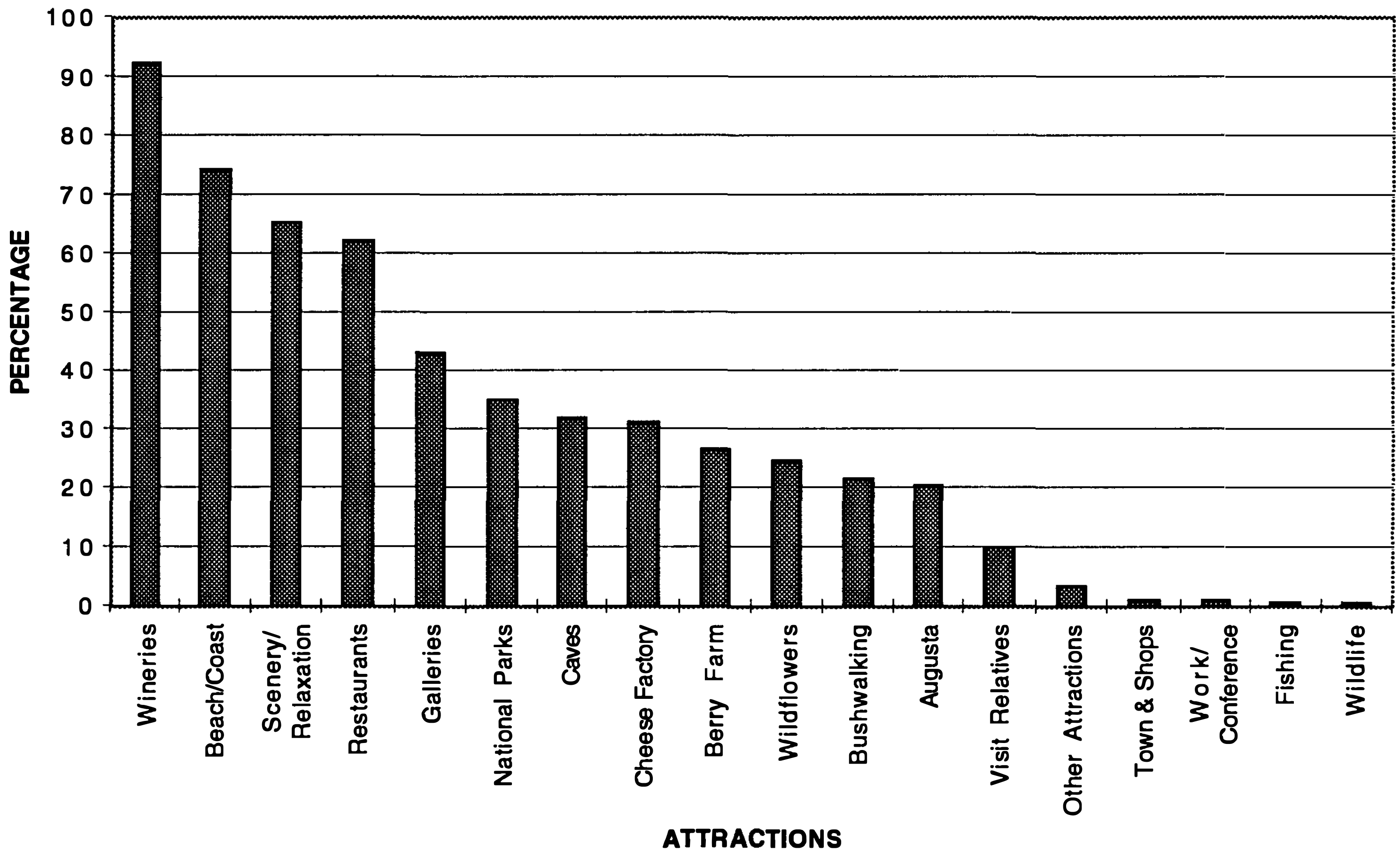
The following section presents the results of the 69 interviews of visitors to Margaret River, the interview of 20 accommodation houses proprietors, 117 questionnaires completed by visitors to the tourist bureau and at accommodation houses and 466 winery visitors. The interviews were conducted in September and the questionnaires were completed between October and December, 1996.

The majority of the results will relate to the questionnaire analysis with additional comments and discussion made in relation to the interviews when it adds extra information or there is a difference in the outcome of the question responses.

The Wineries

The importance of the wineries to tourism in the region was reflected by 93% of respondents stating they had visited or intended to visit the wineries. Approximately half of the respondents (54%) considered the wineries as the most important attraction and 86% considered the wineries as one of the three most important attractions. Other significant attractions were the beach/coast, scenery/ relaxation and restaurants. The major attractions visited in the region are illustrated in Figure 1.

ATTRACTIONS VISITED IN REGION



The Wineries Visited

Those surveyed were asked to list the wineries visited and a total of 41 wineries were identified. On average respondents visited five wineries during their stay. The following is a list of the wineries and the total percentage of respondents that visited these wineries. These percentages reflect the relative popularity of the wineries but it should be noted they are influenced by the number of questionnaires completed at each winery.

Amberley Estate	31%
Vasse Felix	29%
Leeuwin Estate	26%
Happs	19%
Cape Mentelle	16%
Cullen Willyabrup	15%
Evans and Tate	14%
Redgate	13%
Abbey Vale	11%
Cape Clairault	11%
Brookland Valley	10%
Chateau Xanadu	10%
Berry Farm	9%
Pierro	9%
Woody Nook	9%
Ribbon Vale	8%
Willespie	8%
Sandalford	8%
Hay Shed Hill	8%
Wildwood	8%
Fermoy Estate	7%
Ashbrook	7%
Driftwood Estate	7%
Lenton Brae Estate	6%
Wrights Wine	5%
Rivendell	5%
Wise Winery	5%

Less than 5%:
Arlewood Estate, Chapman's Creek Valley, Devil's Lair, Green Valley, Hunt's Foxhaven, Moss Brothers, Mosswood, Rosa Brook, Serventy Organic, Treeton Estate, Virage Wines, Voyager Estate, Yungarra Estate and Graylyn.

Please note that due to multiple responses percentages represent the total proportion of respondents that visited each winery.

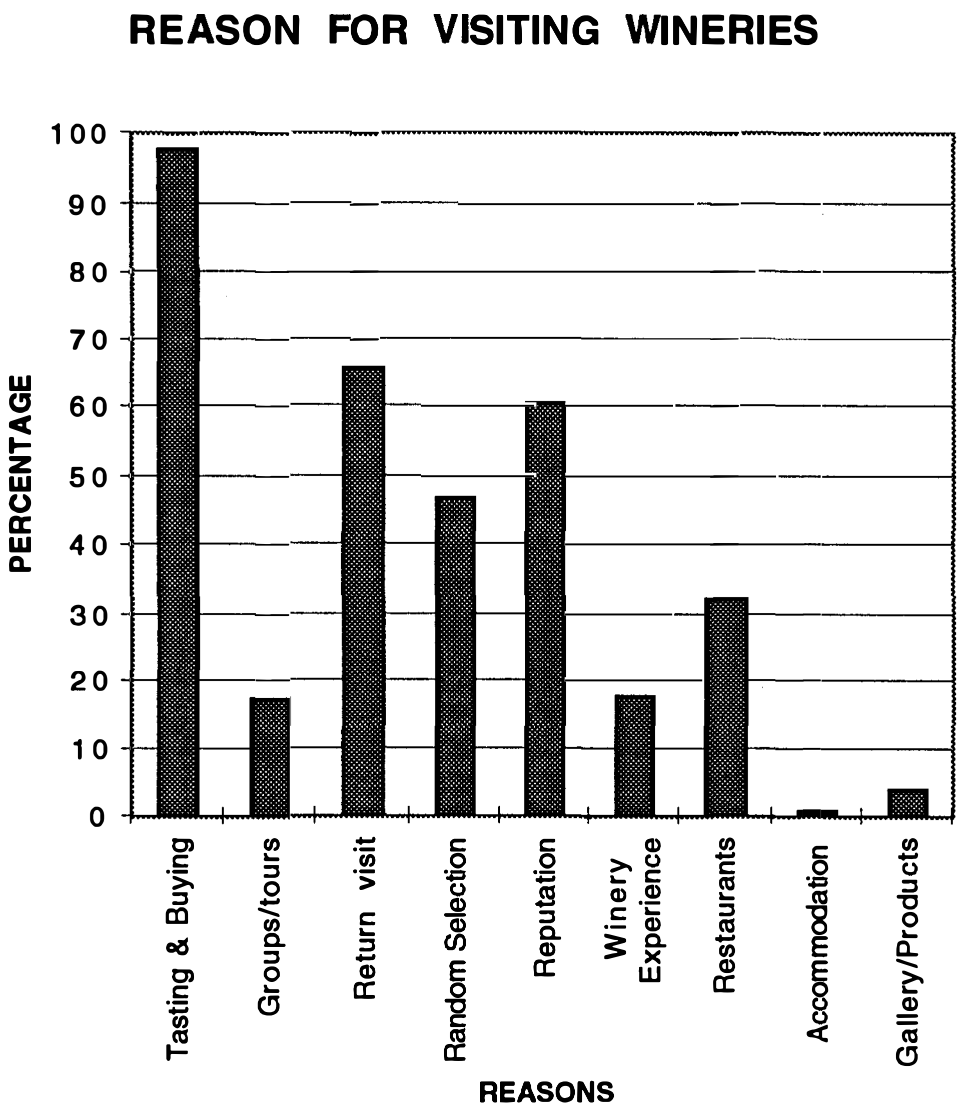
Reasons for Visiting Wineries

Tasting and buying was the overwhelming reason stated for visiting wineries by 98% of respondents. Despite this claim it is interesting to note that approximately 20% of these respondents did not in fact purchase wine at the cellar door and 18% of respondents also indicated that they do not purchase wine on a regular (monthly) basis.

Other significant reasons for visiting wineries included return visit, reputation and on site restaurants as can be seen in Figure 2. It is interesting to note that almost half of the respondents made some selections on a 'random basis'; to try one they had not previously visited or an impulse decision as they passed by. Signage, the roadside visibility and external attractiveness of a winery can impact on such impulse decision makers.

In relation to the question on the importance of facilities in selecting wineries to visit galleries, products for sale or entertainment available did not emerge as significant factors (4%). On site accommodation and children's playground also proved to be unimportant facilities and were not stated as reasons for visiting any of the wineries. The lack of the requirement for a children's playground may reflect the high percentage of people visiting the winery without children. Preliminary interviews at the tourist bureau and non-winery tourist attractions did reveal a segment of the tourist population that indicated that they did not intend to visit the wineries due to the fact that they had children. It appears to the researchers that this group have not been captured in the overall study because of the predominant distribution of the questionnaires at the cellar door and the promotion of the survey at the tourist bureau as a "Cellar Door Survey". This visitor group may be worthy of closer consideration to identify factors that would bring these people to the wineries.

Figure 2


REASON FOR VISITING WINERIES
PERCENTAGE
100
90
80
70
60
50
40
30
20
10
0
Tasting & Buying
Groups/tours
Return visit
Random Selection
Reputation
Winery Experience
Restaurants
Accommodation
Gallery/Products
REASONS

Cellar Door Visitor Profile

The winery visitor was primarily a well educated, professional person between the age of 25 and 54 years. It is more likely that the visitor is from Western Australia although there were 29% from interstate and 9% international tourists. Two thirds of visitors have been to Margaret River more than once and the majority stayed for two to three days and were in small groups. The average monthly expenditure on wine was $92 with 30% spending $50 or less and 27% spending between $51 and $100.

The details of the visitors are as follows:

Of the 578 visitors 52% were female respondents and 48% male.

The age group consisted of:

Years		
18-24	....	12%
25-34	....	33%
35-44	....	26%
45-54	....	17%
55+	....	12%

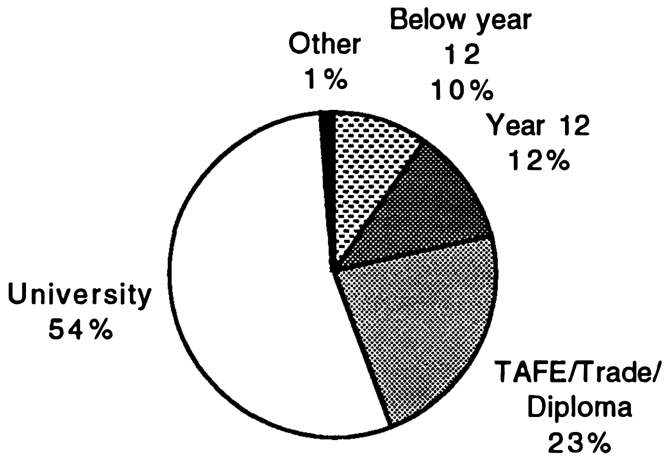
The educational qualifications of respondents were:

University degree	54%
TAFE/ trade/ diploma	23%
Year 12	12%
Less than year 12	10%

Figure 3 illustrates the educational qualification and indicates the high percentage of respondents with post secondary qualifications.

Figure 3

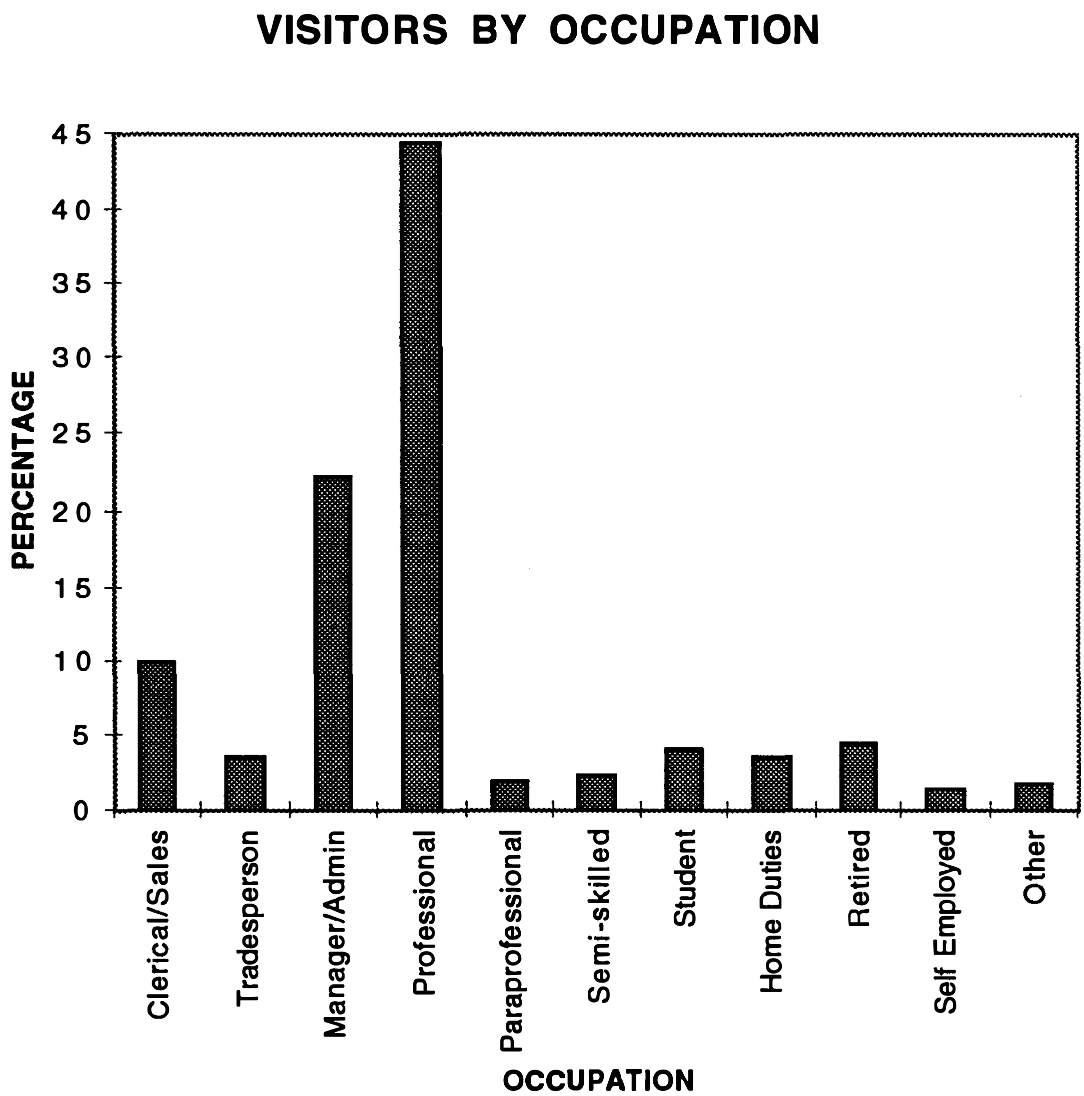
VISITORS BY EDUCATION LEVEL



The high percentage of respondents with university degrees is in line with the findings of Dodd's Winery Survey (1995). Of the 636 cellar door visitors surveyed in Texas 66% held a university qualification.

The occupational groupings were consistent with the educational level of respondents with 45% in professional positions such as doctor, teacher, accountant, nurse and a further 23% in managerial/ administrator or self employed. The details of the occupations of all the respondents are illustrated in figure 4.

Figure 4



Residence of Respondents

The majority of the respondents were from Western Australia but people at the accommodation houses, tourist bureaus and wineries reported an increase in international tourists to the region. All groups reported higher levels of tourists through the winter season and a greater number of international visitors throughout the year including the summer season.

The residence of respondents was:

Perth Metro	50%
Regional WA	12%
NSW	12%
Victoria	7%
Other Australian States	10%
International	9%

Visitor group size; the number of adults accompanying respondents.

Eighty eight percent of respondents were accompanied by one to four adults and only 15% of respondents stated that they were accompanied by children. Two percent were in groups of 20 or more. It is interesting to note that only two people visited the wineries alone. Almost half of the respondents visit the region more than once a year. The region also attracted a high proportion of first time visitors

Frequency of visit:

First visit	35%
second	12%
at least 4 times a year	13%
at least twice a year	14%
at least once a year	18%
less than once a year	8%

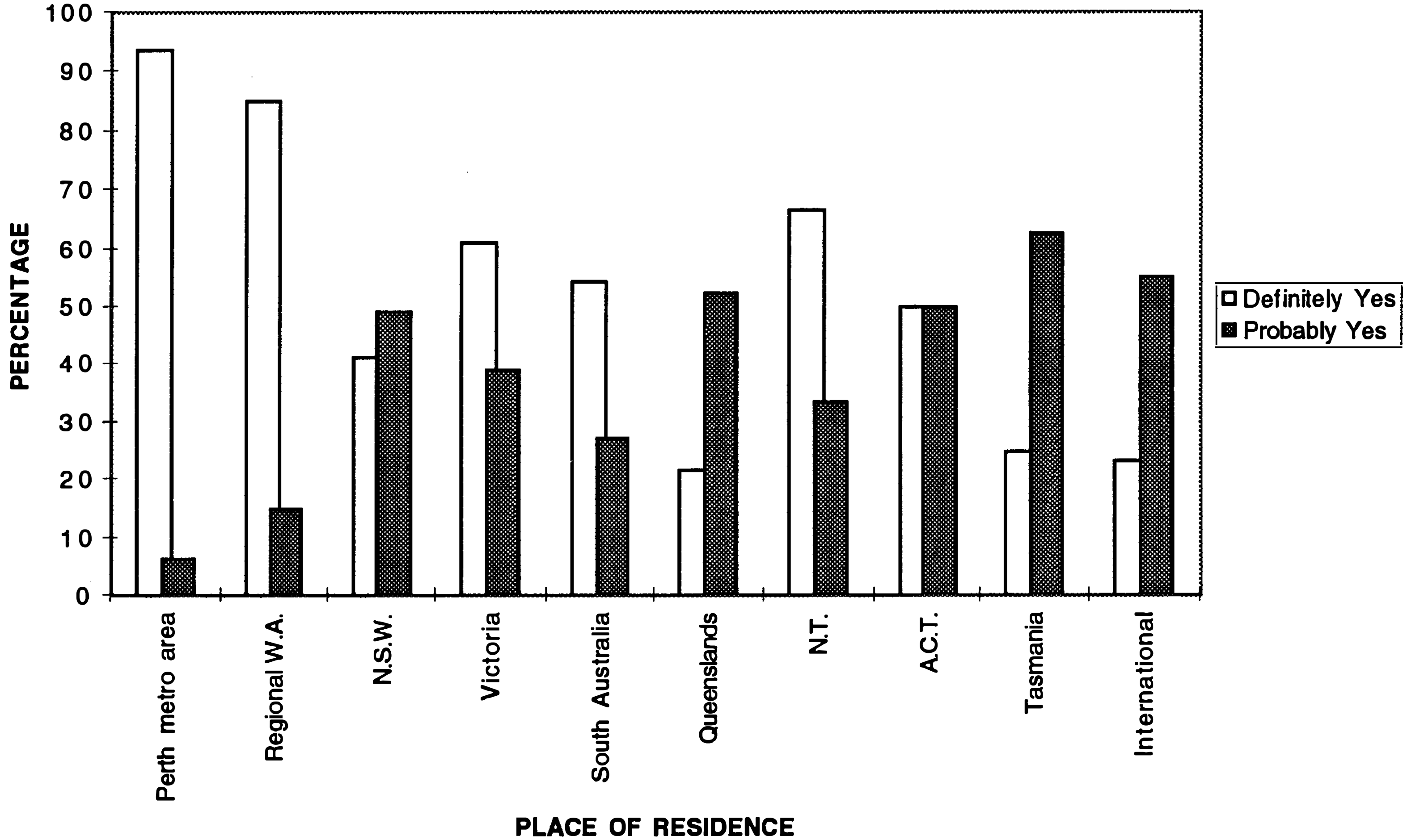
Of these respondents 54% stayed 2-3 days and 94% one week or less.

Intentions to Return

Of the respondents 73% stated they would definitely return to the region with a further 23% saying they would probably return and only one person stated they would definitely not return. Figure 5 indicates the respondents that stated they definitely or probably intend to return to the region by their place of residence.

The expectation to revisit the area is extremely high amongst virtually all groups regardless of place of residence. This must reflect that the majority of the visitors enjoyed their tourism experience.

WILL BE RETURNING TO THIS REGION BY PLACE OF RESIDENCE



Monthly Wine Purchases

Of the respondents 18% did not purchase wine, stating they spend nothing on wine each month. Thirty percent spend $50 or less per month, 27% spend $51-$100, 17% spend $101-$200, and 8% over $200.

The average monthly wine bottles purchased were 6 bottles valued between $10 and $15 a bottle. Approximately one-fifth of respondents stated they purchased no bottled wine, half of the respondents purchased between 1 and 8 bottles per month and one quarter of respondents purchased more than 8 bottles. The cellar door visitor is predominantly a bottled wine drinker with only 9 respondents (1.5%) stating they drink cask wine only, and 16% stating they drink cask and bottled wine.

Of those purchasing wine the majority bought their wine from retail outlets as indicated in Figure 6. Approximately one-tenth of respondents purchased directly from wineries and 8% from wine clubs.

Figure 6

With approximately one in five cellar door visitors purchasing their wine through wineries and wine clubs potential exists for developing marketing outlets for Margaret River wines through wine clubs across Australia. If this strategy is not already being employed this avenue is worthy of consideration as an additional marketing channel.

Characteristics of the Wine Consumers

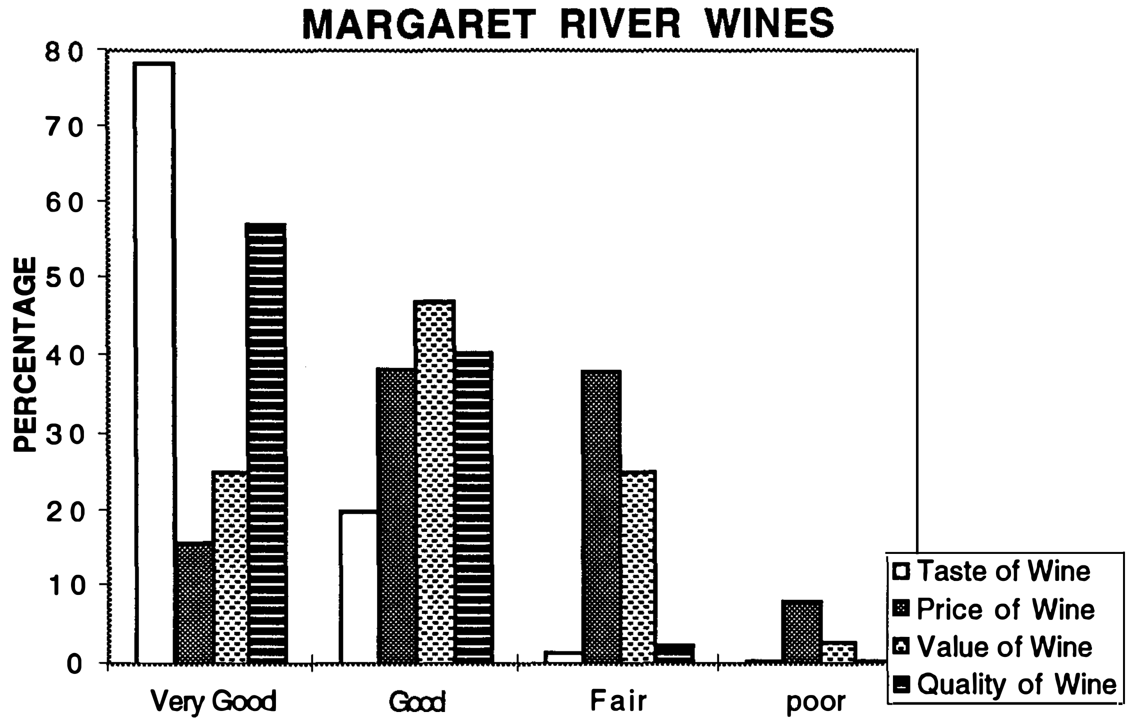
The Margaret River wines were rated highly for taste and quality but value and price received poorer ratings with many respondents considering the price too high. One third of respondents were against the tasting fee and stated they probably would not visit the wineries if the fee was introduced.

Opinion of Margaret River Wines

The taste of the wines was rated as 78% very good, 20% good. Quality was rated as 57% very good and 40% good. Value was rated as 25% very good, 47% good however 25% considered the value of Margaret Wines as fair and 3% poor. This lower rating of value is reflected in the rating of the price of Margaret River wines; 46% considered the prices fair to poor and only 16% considered it very good. These opinions reflect the attitudes expressed in the preliminary field survey where taste and quality were highly rated but value and price were concerns expressed by many of the winery visitors interviewed. The rating of Margaret River wine by respondents is illustrated in Figure 7.

An in depth analysis was conducted to determine if the non-buying and cask drinking wine groups were different in their assessments causing the lower rating of value and price but the perception of these variables was uniform regardless of the expenditure at the cellar door and the level of monthly wine purchased by visitors. There was however a significant difference in opinions between respondents surveyed at the tourist bureau and those at the cellar door. The pricing of the wines was rated as fair to poor by 57% of respondents surveyed at the tourist bureau compared with 44% of those surveyed at the cellar door. It should be noted that 71% of the tourist bureau group had already visited the winery and another 14% intended to visit.

Figure 7



Cellar Door Expenditures

There was a wide distribution of expenditure on wine at the cellar door, ranging from nil to $7,000. Twenty four percent of visitors spent nothing, another 25% spent $50 or less, 19% spent between $50 to $100, 15% between $100 and $200 and 16% over $200. The very high expenditure levels are probably attributable to retail purchases by industry people. This inference is made on the basis of findings during the interviewing of cellar door visitors where a small percentage of people interviewed were identified as industry people such as retailers and restauranteurs.

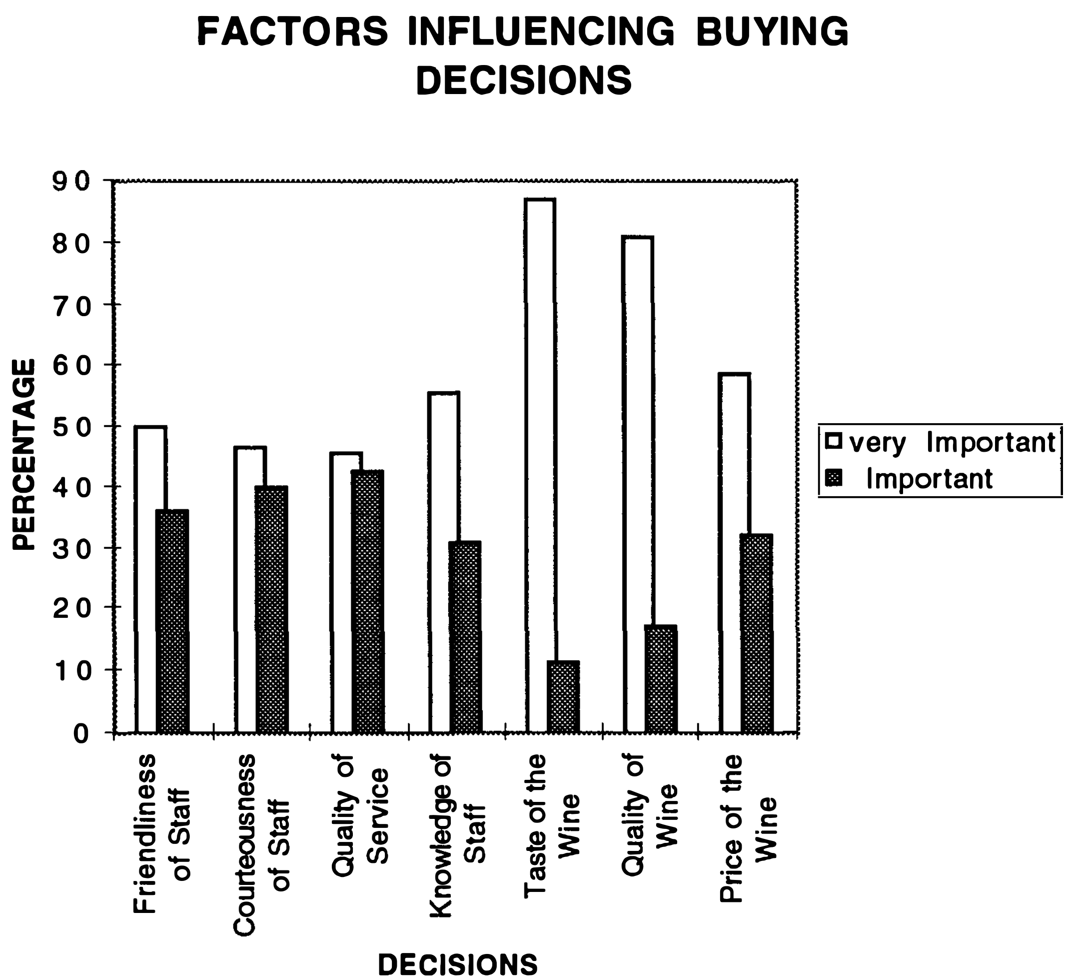
Fifty nine percent of respondents patronised winery restaurants and approximately half (58%) spent $100 or less. This result reflects the importance of restaurants in selecting wineries to visit as discussed earlier.

Only a small proportion of respondents made purchases of local produce (29%), souvenirs (15%) and arts and crafts (28%). The average expenditure was $8 for souvenirs, $17 for produce and $35 for arts and crafts.

Factors Influencing Buying Decisions

The service items that proved to be paramount in making wine purchase decisions at the cellar door were the taste of the wine, its quality and price. Figure 8 identifies those variables considered important or very important in making wine purchases at the cellar door. The high rating for taste and quality as very significant factors in the wine purchase decision relative to even price, helps to explain why visitors still buy Margaret River wine regardless of the relatively poor rating many respondents gave to price.

Figure 8



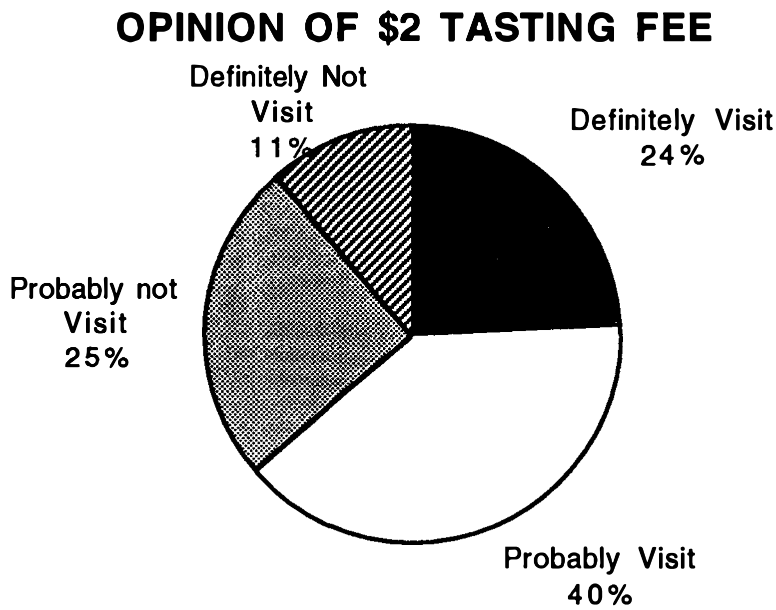
Cellar door visitors were asked to rate the wineries on the service items of friendliness of staff, courteousness of staff, quality of service and staffs' knowledge of their wines. All these service items were rated as good to very good by at least 96% of respondents. However friendliness and courteousness were rated considerably less favourably in the preliminary interviews with both tourists and accommodation house proprietors. This discrepancy may be due to the differences in the small number of interviews relative to the questionnaire survey. This question was statistically tested for reliability and the results showed this to be a reliable question. The researchers are still concerned about the discrepancy in the results and would suggest that individual wineries explore this service component further.

A need may exist at some wineries for cellar door staff training in customer service. Alternatively this result may reflect only isolated negative experiences by some visitors. It may also be a product of some cellar doors being understaffed at busy times placing staff under very pressured conditions. The reason for the discrepancy warrants further exploration if a uniformly high standard of cellar door service is to be achieved across the entire industry within the region.

Tasting Fees

Of the 543 respondents that expressed an opinion about a $2 tasting fee 36% stated they probably or definitely would not visit wineries that introduced the fee, as illustrated in figure 9.

Figure 9



The wineries are certain to lose some existing and potential visitors if a tasting fee was introduced.

The profile of the respondents that stated they probably would not visit the winery if a tasting fee was introduced is as follows:

- They purchased 1 to 8 bottles of wine monthly
- Purchased up to $200 of wine per month and
- Spent up to $200 at the cellar door.

The profile of respondents that stated they would definitely not visit a winery that charged a $2 tasting fee was:

- Purchased between 1 and 8 bottles of wine monthly.
- Spent up to $200 on wine purchases monthly and
- Spent up to $100 at the cellar door.

The individual rating based on the amount spent at the winery, monthly expenditure and number of bottles of wines purchased monthly are illustrated in figures 10, 11 and 12.

Figure 10

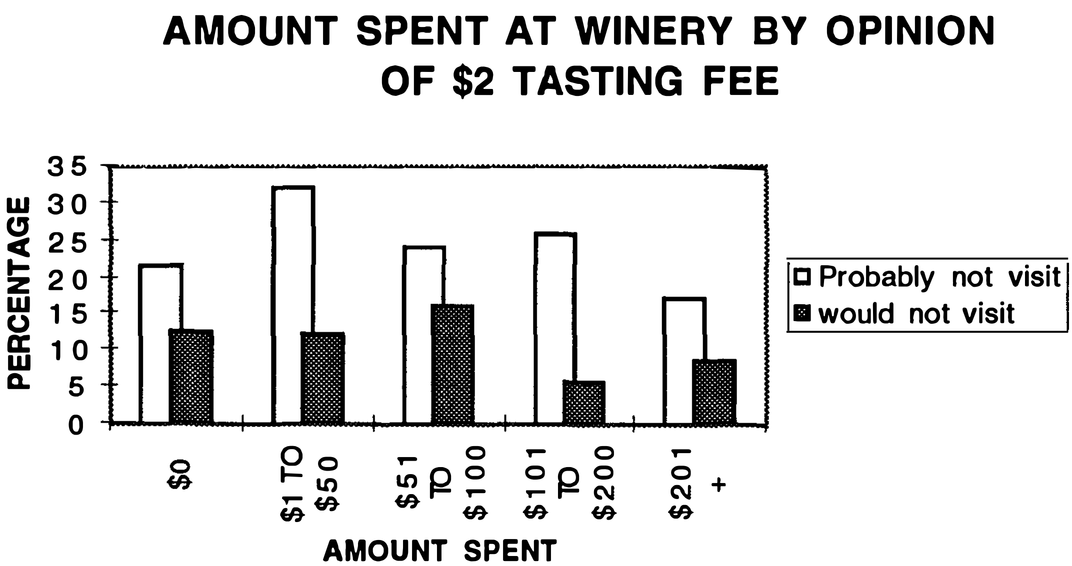


Figure 11

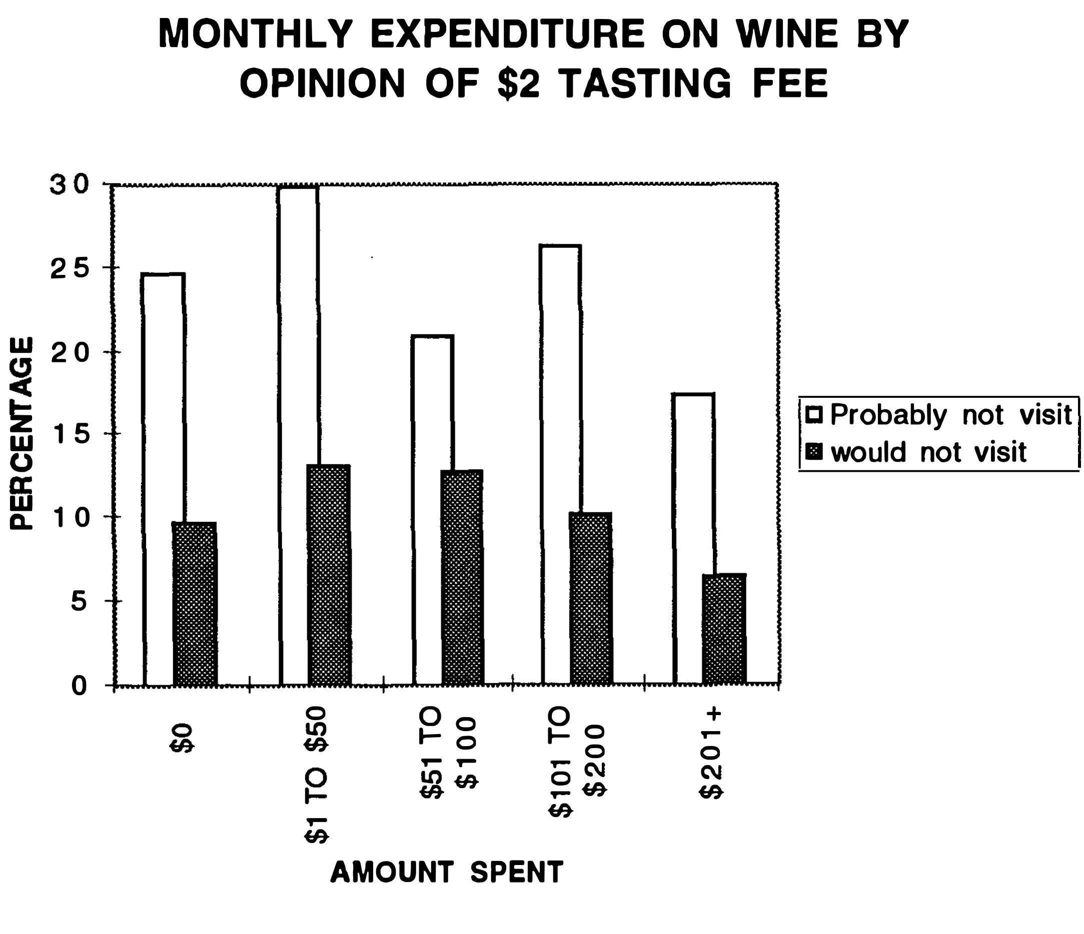
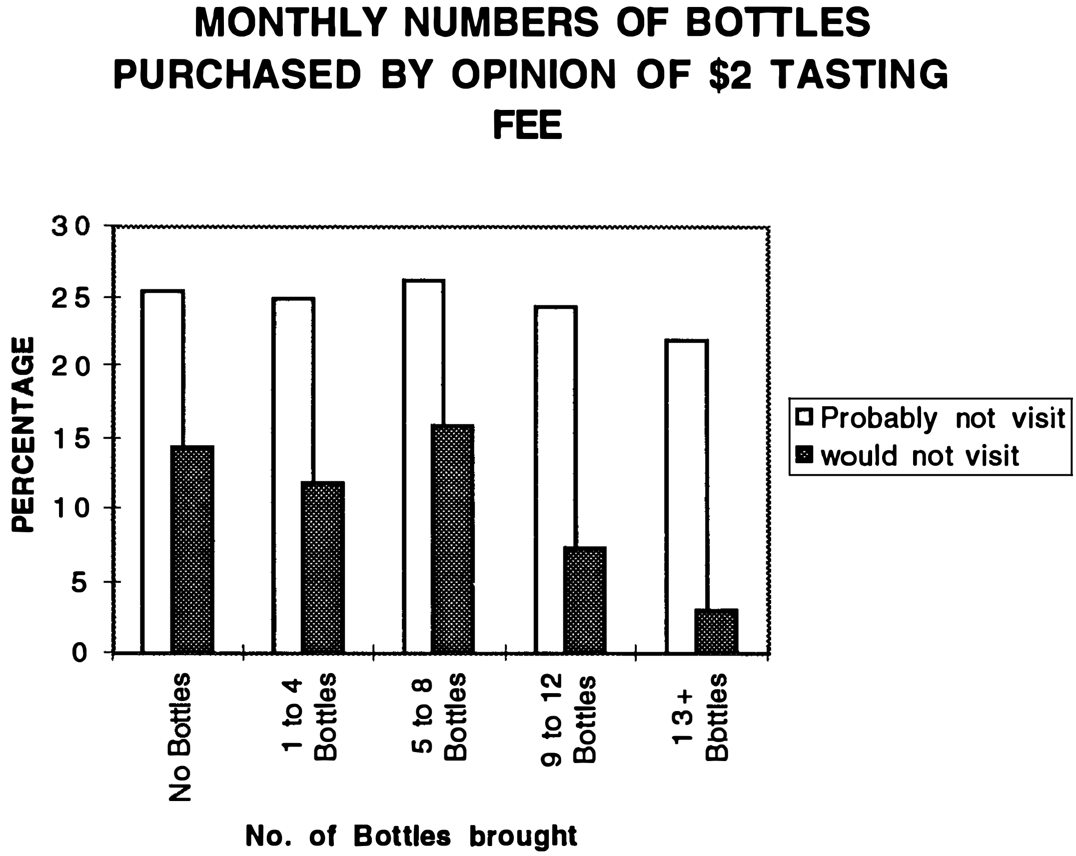


Figure 12



The two dollar tasting fee influenced visitors that are regular purchasers of wine and therefore should be a major consideration for wineries. The primary group the wineries need to be concerned about are those that indicated they definitely would not visit if a tasting fee is introduced.

This definite and defined dislike of the tasting fee was also reflected by a small number of respondents in the field survey. The interviews reflected people against the fee did purchase wine at the cellar door but they did not like the idea of the fee even if it was returned when they purchased wine at the cellar door.

With questions on price there is a tendency for respondents to be negative. So visitors that stated they probably would not visit wineries that charged a tasting fee may end up visiting regardless of the fee. While this group may be of lesser concern their opinions should still be taken into consideration by wineries considering the introduction of a tasting fee. This may be of particular significance to the small winery.

Knowledge and Interest

The majority (88%) of respondents were interested in wines but only half considered themselves knowledgable about wines as illustrated in Figure 13 and Figure 14.

Figure 13

KNOWLEDGE OF WINES

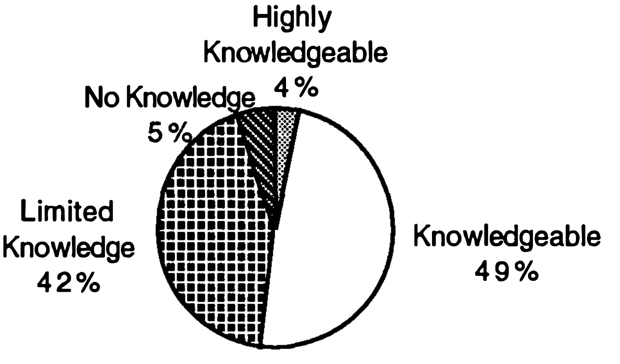
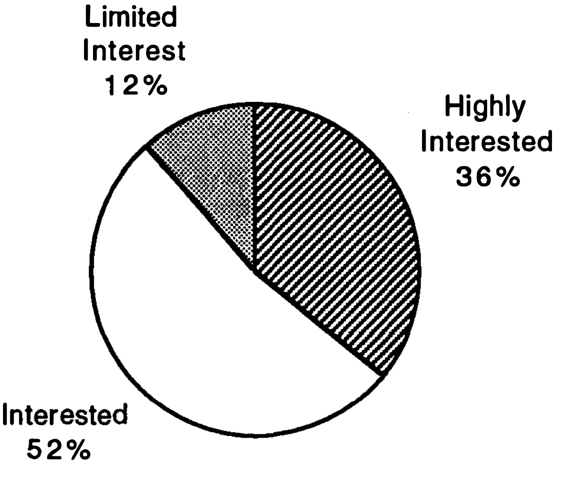


Figure 14

INTEREST IN WINES



This may reflect the desire to learn more about wines and wine appreciation so presents considerable scope for developing and providing wine education materials at the cellar door. This provides an opportunity for developing databases for winery newsletters which could be developed by individual wineries or the Wine Industry Association. This type of promotion is excellent for developing brand or region loyalty and is used extensively in marketing to existing and potential target groups.

Winery Information

The survey reflected that there was an inadequacy of information relating to the wineries, tourist attractions and tourist facilities. The strongest need exists for a good quality tourist map and suitable information on the wineries. Four hundred and twenty respondents answered this question. As can be seen in figure 15 the need for more information on wineries was stated by 77% of respondents; 65% wanted more on wine tasting notes; 83% wanted a detailed tourist map with attractions and distances identified; 69% wanted more information on opening times on attractions; 68% wanted more information on new and current activities (What's new guide); 66% a restaurant guide and 54% an accommodation guide; 67% percent of interstate visitors stated they wanted tourist information more readily available interstate.

Figures 15,16,17 and 18 indicate the information requirements by the place of residence of the respondents. The ranked importance of the various types of information needed is fairly uniform across all groups regardless of the place of residence.

The provision of suitable information should be a major area of concern for the wineries and the tourist bureau as visitors from all origins stated a need for more information of all types. Although some of this material is already available the ease of obtaining the information needs to be addressed. This may mean distributing the information through a greater variety of channels.

Any decisions about charging for tourist information and particularly maps needs to be carefully considered as the interviews reflected a dislike by Australian visitors to pay for such information. This could be different for international tourists especially European tourists who are used to paying for tourist information but currently these visitor number are low.

Figure 15

ADDITIONAL INFORMATION REQUIRED ON REGION

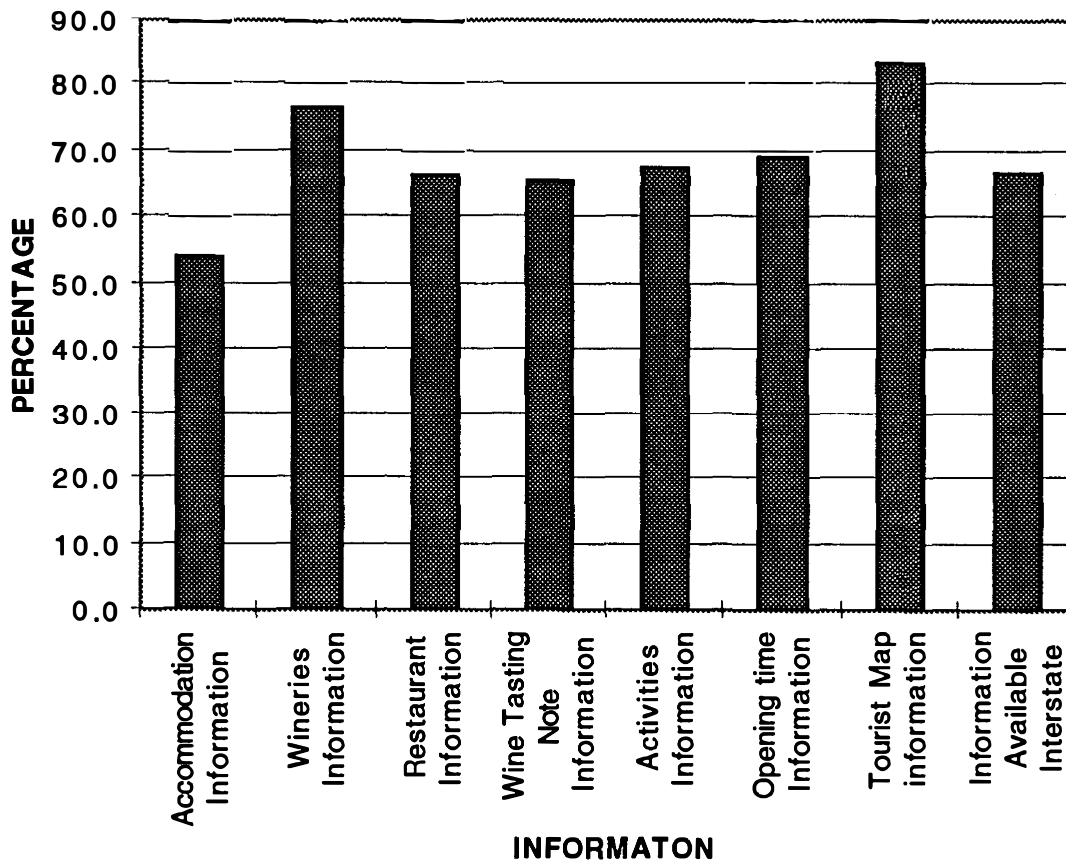


Figure 16

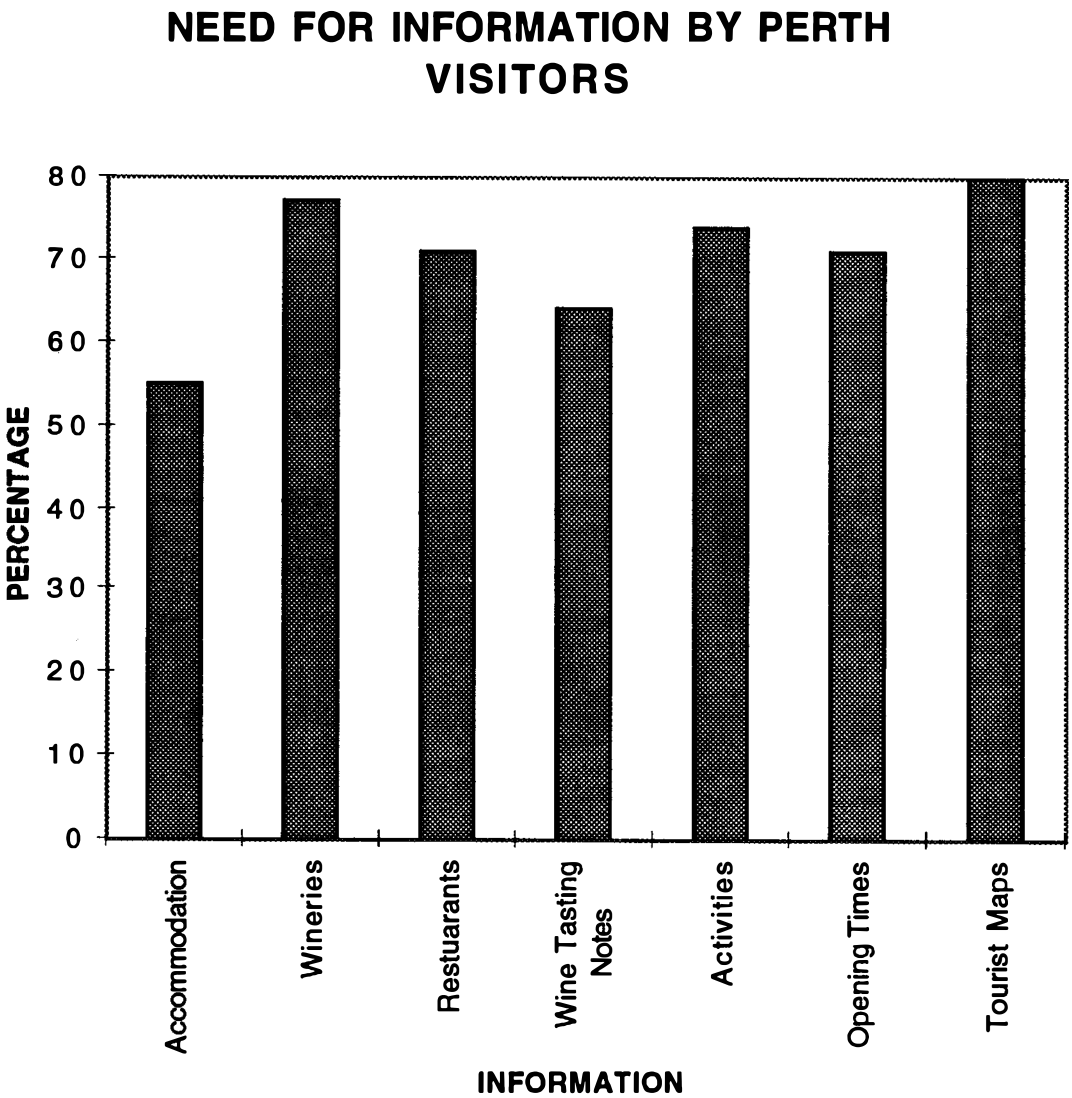
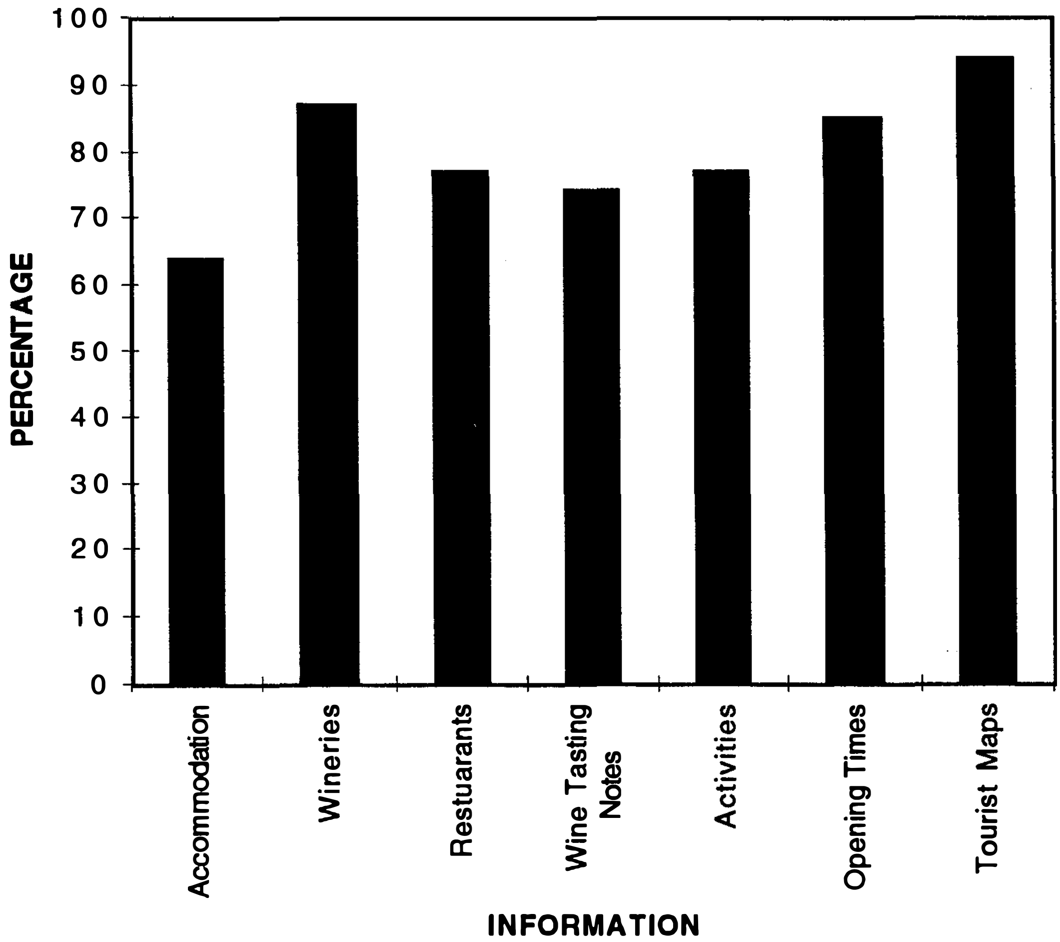
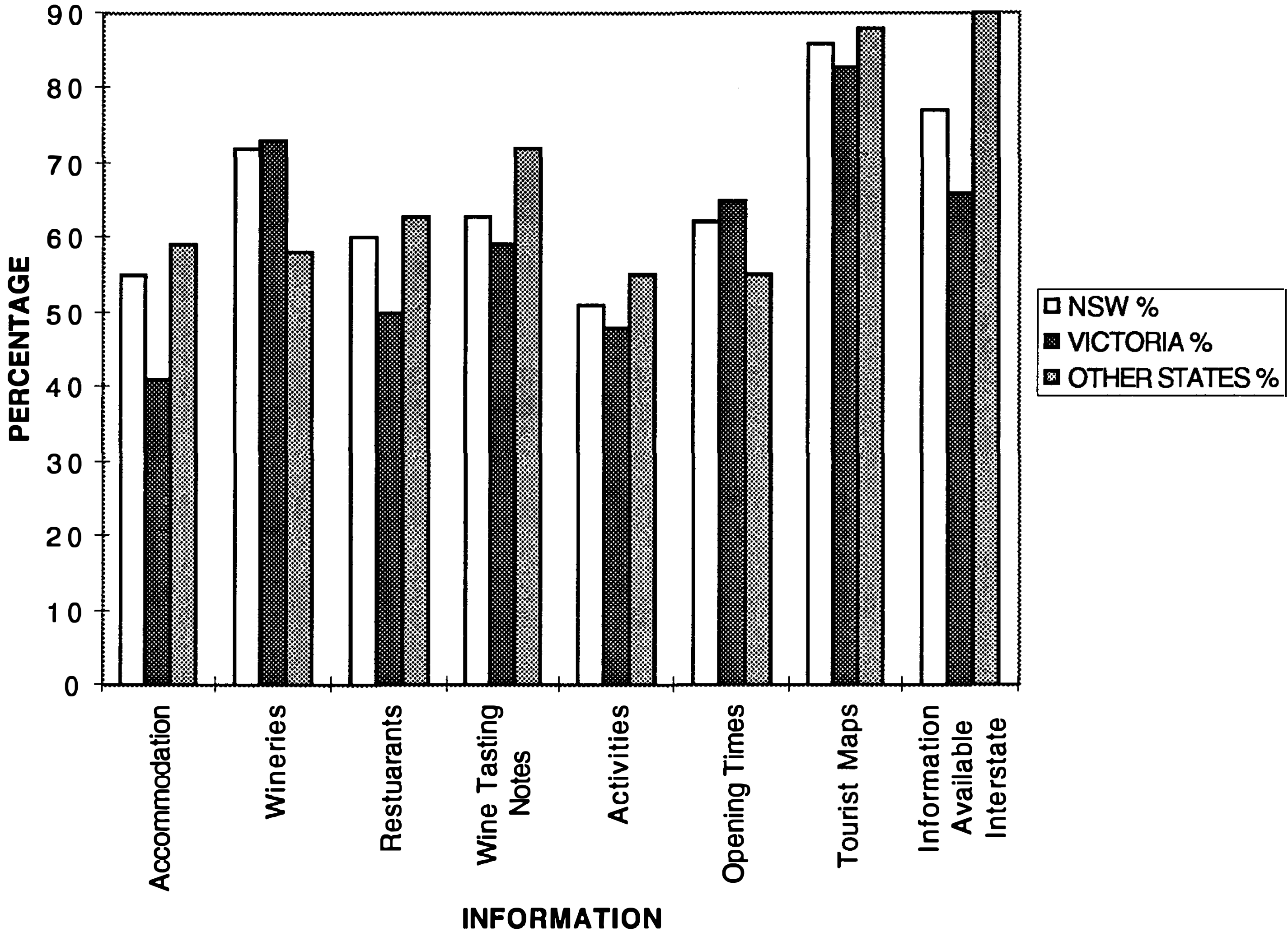

NEED FOR INFORMATION BY PERTH VISITORS
80
70
60
50
40
30
20
10
0
PERCENTAGE
Accommodation
Wineries
Restuarants
Wine Tasting Notes
Activities
Opening Times
Tourist Maps
INFORMATION

Figure 17

NEED FOR INFORMATION BY REGIONAL WA VISITORS



NEED FOR INFORMATION BY INTERSTATE VISITORS



NEED FOR INFORMATION BY INTERNATIONAL VISITORS

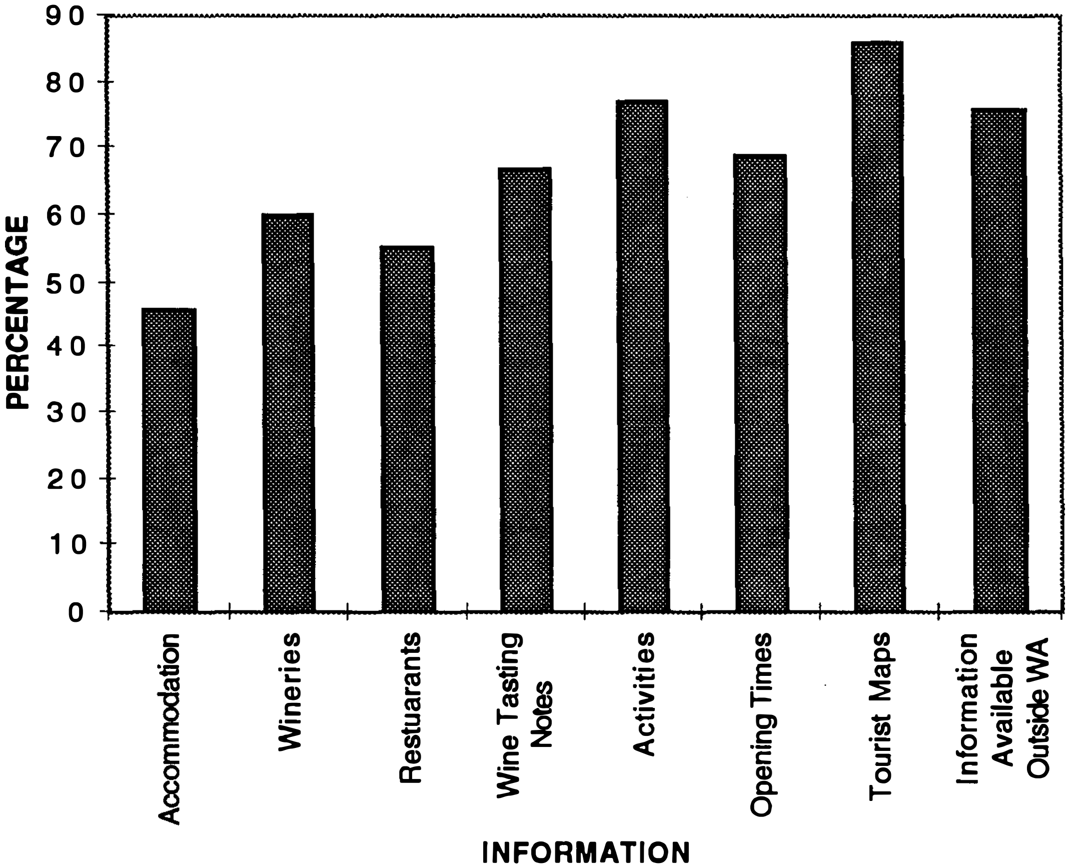


Figure 19

The major information sources on the wineries were:

Word of mouth	65%
Own knowledge	57%
Tourist map	44%
Tourist Bureaus:	37%
Augusta/ Margaret River (24%)	
Other Tourist Centres (13%)	
Sign Posts	33%
Accommodation	9%

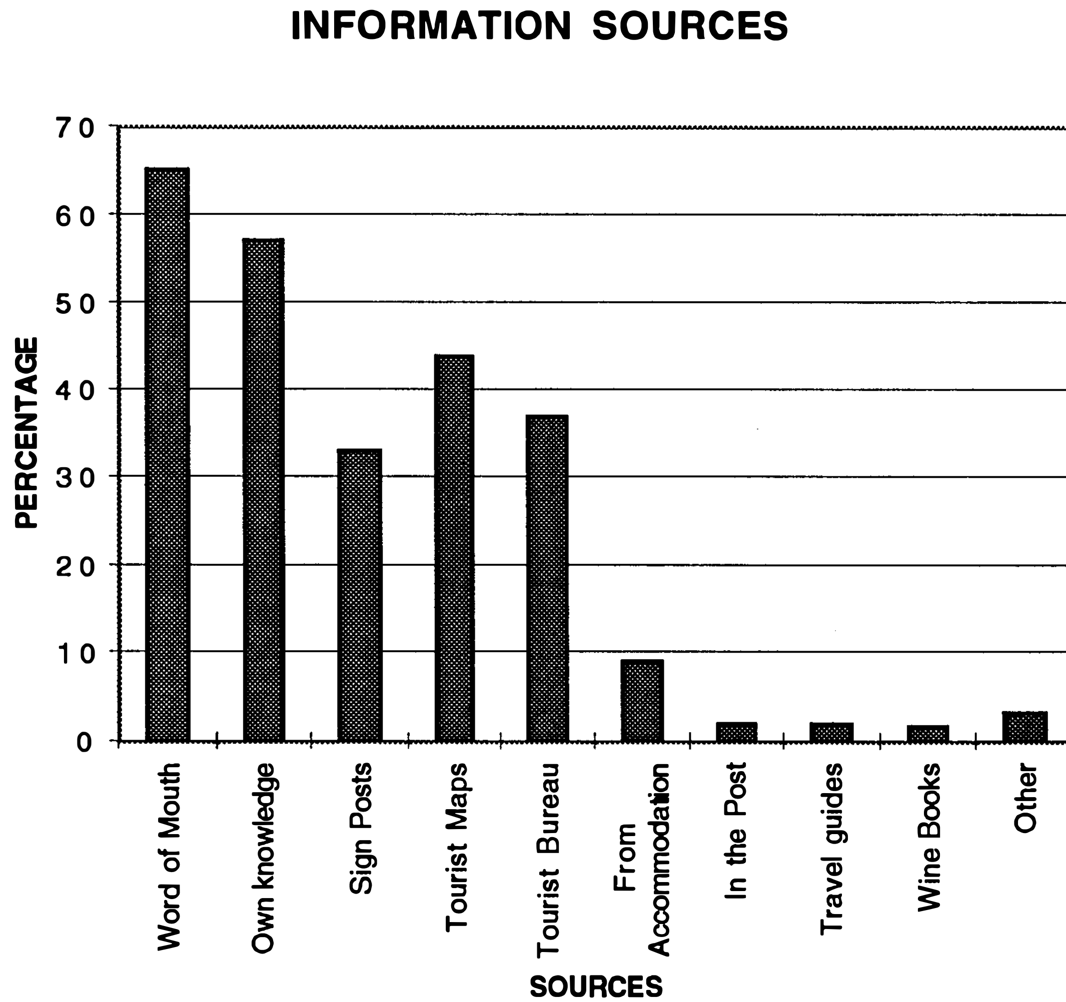
It should be noted that there were multiple responses and therefore the percentages do not add to 100%.

The field interviews identified that signage for the wineries on main roads are considered to be very good. It is evident that main road signs are a significant source of information for tourists. Tourist Bureaus also play a significant role in providing visitor information about wineries with nearly 40% of respondents identifying them as a source of information. Tourist centres ranked fourth as a source of information on wineries, however personal sources dominate.

Figure 20 illustrates these major sources of information.

This information needs to be seriously considered in relation to the responses to the need for more information sources. The heavy reliance on word of mouth, personal knowledge and the lack of utilisation of accommodation houses may in fact reflect a lack of suitable printed tourist material. These results also reflect our field survey of accommodation houses in which there was little winery literature available at most locations and the difficulty we experienced in uncovering the existence of the wineries guide at any location. The availability and easy access to material obviously needs to be addressed. This could be an area of further research for the wineries and tourism associations.

Figure 20


INFORMATION SOURCES
PERCENTAGE
70
60
50
40
30
20
10
0
Word of Mouth
Own knowledge
Sign Posts
Tourist Maps
Tourist Bureau
From Accommodation
In the Post
Travel guides
Wine Books
Other
SOURCES

Wine Tourism Marketing Opportunities

Consideration may be given to each of the following opportunities that became apparent through the research undertaken:

1. Selection of clearly defined segments of the market on which to focus. Potential segments include the general wine tourist, small to medium size wine specific tour groups, the general tourist and wine tourists with children.

2. The development and use of a well defined image for the wineries which features in all promotional materials.

3. Greater collaboration between the Augusta-Margaret River Tourism Association, wineries and other tourism related operators. The collaboration includes the design and development of a unique wine tourism package that builds on the comparative advantages of the Cape-to-Cape region. An important central coordinating role could be performed here by the Tourism Association in promoting the new wine tourism package and image for the region.

4. Development of wine tourism products comprising of different combinations of 'wine tourism trails' with varying themes which offer winery visits and some with other activities to appeal to a variety of visitor types. These enhanced wine tourism products could be aimed at not only expanding the number of visitors and return visits to the region but encouraging visitors to increase their length of stay in the region.

5. Better meet the informational needs of the wine tourist through the integration of currently available and newly developed promotional materials and improved accessibility of these materials.

6. Develop customer databases either at a wine industry association and/or individual winery level.

Recommendations

The wine tourism research has indicated a very strong link between the wineries and tourism in the region with over 90% of tourists visiting the wineries and perceiving them as the primary tourist attraction although it is evident that large numbers of tourists considered the extensive variety of activities in the region to be a highly appealing characteristic of the region. This feature of the Cape-to-Cape region is a significant factor in tourists making repeat visits. Therefore although the wineries are very important it is critical that they be recognised as part of the total tourism package in the region. This has indicated the need for developing a wine tourism strategy including a promotional plan that better integrates the wineries and the tourism industries. It would be vital to the success of the development and implementation of such a strategy that the Tourism Association and the Wine Industry Association work closely together.

While the survey has indicated a very good tourism product with a strong association between the wineries and tourism and an opportunity to develop a stronger targeted product, it also revealed some weaknesses in the promotion.

The three major weaknesses revealed in the research are:
- The inadequacy of promotional material in general
- Poor accessibility and distribution of promotional materials
- The lack of clientele databases.

In the light of existing opportunities and the weaknesses revealed, the following recommendations are made.

Recommendation 1: Develop and integrated wine tourism promotional plan

Ideally the two associations should work together to develop a complete wine tourism promotional plan. This plan not only needs to address the three weaknesses above but should go beyond these three points to include a total wine tourism package.

1.1 An image

To achieve a total tourism package the wineries need to confirm their commitment to their involvement in wine tourism and determine the image they want to portray, that is the way they want to be viewed by existing and potential cellar door visitors. The image chosen needs to set the Margaret River wineries apart from other competing wine growing areas and appeal to the targeted groups.

1.2 Target groups

The next step in this strategy is the selection of specific target groups the wineries wish to attract to their cellar doors. The survey and the interviews indicated two major groups of tourists; the wine interest group that primarily want to visit wineries only and the general tourist that wants to visit wineries in combination with a wide range of other activities such as visiting the beach, bushwalking, sightseeing, visiting the restaurants and general relaxation. These are distinctly different groups. Other potential groups include wine specific tour groups of varying sizes (as distinguished from the small group independent wine interest cellar door visitor), the family group and wine industry groups.

1.3 Wine tourism package

Having chosen your target groups the next stage involves the development of a total wine tourism package to appeal to these selected target groups. The distinctly different groups chosen require different tours. The Tourist Bureau, wineries and tour operators could work together to design, promote and provide some winery tour trails. Some tours could be self guided while others may be offered by tour operators in association with the wineries.

Tours developed would need to consider different group sizes, as their are a variety of different sized groups that went to the wineries. Wineries must decide if they want to encourage people with children which would require the provision of facilities designed to keep accompanying children occupied while the adults participate in wine tastings. If this was part of a package then this group could spend a small amount of time at the wineries and they would probably purchase wine. Currently most of this visitor group appears not to visit the wineries although in the interviews many indicated they would if suitable children's activities or facilities were provided.

It should be noted that there will always be a percentage of visitors that do not buy wine at the cellar door but with guided tours there can be a winery fee included in the cost of the package. This would address the problem in relation to the resistance to a tasting fee and make the tasting more economical for the wineries while increasing clientele and presumably sales.

As discussed above there could be a variety of tours for different target groups and different group sizes for example winery trails that provide for visitors with interests in particular types of wines; wines and galleries; wining and dining.

1.4 Promoting the wine tourism product

Once the wine tourism products are determined the promotion of these packages is of primary importance. During the research the lack of promotional material was stated as a problem by visitors.

Promotional efforts need to be planned and effectively implemented to ensure that these promotional dollars are not wasted. The promotional material must cover the needs of the target groups and all participants of the survey indicated the need for more information on wineries including their wines, facilities and opening times; distances from other attractions and towns; local activities; restaurant and accommodation guides.

The different forms of promotion as brochures, newsletters, tourist booklets, direct mail, tourist expos/displays and media coverage as press, radio and television all need to be considered in an integrated promotional plan to gain the most for your media dollar.

Recommendation 2: Design and produce a single wine tourism promotional guide

From the researchers' experiences during the study it became obvious that a reasonable amount of promotional material on the wineries does exist however considerable effort needed to go into uncovering this material. When the material was found it consisted of lots of individual brochures rather than a single structured tourist information guide.

Consideration needs to be given to developing a single wine tourism information guide providing visitors with the desired information. Of particular importance is the provision of a good quality tourism map identifying the wineries, major tourist attractions, relevant distances and wine tour trails as well as opening times and restaurant and accommodation information. This information should be free or at a nominal charge such as 50 cents. While a small fee can be considered acceptable for providing self guided tour material, this fee could be included in the cost of guided tours and material distributed as part of the tour. Such a document could be produced by the Augusta-Margaret River Tourism Association in collaboration with the Wine Industry Association.

This document could then be supplemented with the single brochures provided by individual wineries and a 'What's New Guide' produced at regular intervals and containing information about new and up and coming special events in the region. This could also contain feature articles about wineries or other tourist attractions in the area that would be of interest to the targeted groups.

Recommendation 3: Improve the accessibility of promotional material

Once you have considered the tours you want and the type of material to use to promote these tours then you need to plan the distribution of these materials so that it provides easy access for tourists to gain this information.

This material must not only be accessible to tourists but someone must also be responsible for maintaining supplies, ensuring the brochures are being made available to tourists and that the material is kept up to date especially in relation to opening times.

Accommodation houses are a greatly underutilised channel for distributing winery information. In our field survey we noted that there was little material available at the accommodation houses but proprietors expressed a willingness to display winery material if wineries provided the brochures and ensured up to date supplies and information. Some accommodation houses did produce their own material because little or none was provided. To ensure the maintenance of the desired image and overall cost effectiveness it is far better for the wineries to provide brochures to accommodation houses than have them produce their own. It is therefore recommended that the wineries make greater use of accommodation houses as a point of distribution for wine tourism information.

It is important to note that the visitors to the wineries are from Perth, regional WA, interstate and international locations. Information must therefore be distributed through suitable channels at these locations. Material outside WA appeared to be limited. This should be a major concern especially considering that visitors from these locations stated there was a major need for more information available interstate and these tourists stay longer and spend more so form a very lucrative segment of the current and potential tourism market. It is therefore recommended that the number of points for distributing wine tourism promotional material be expanded at major places of visitor origin. Accommodation houses, travel bureaus, travel agents and travel expos could be considered for all these locations as major promotional channels.

Recommendation 4: Develop clientele databases and in-house promotions

In addition to the cooperative promotional efforts of the wine and tourism sectors individual wineries also have the opportunity to develop in-house promotions such as clientele databases. This form of promotion is used extensively by small business and has had excellent results in developing customer relationships which develops into customer loyalty and if part of a marketing strategy, results in a competitive advantage within the industry. This also automatically increases repeat visits and purchases. As loyalty increases the perception of quality increases and the importance of price decreases.

It was surprising to find from the audit of winery facilities and services that only half of the wineries responding keep a visitors book. This is a very inexpensive means of gathering customer information and may form a starting point for the development of a clientele database. Individual wineries could consider setting up a clientele database at very low cost by providing an inexpensive computer at the cellar door for visitors to add their name and personal details. A simple program may also be designed to ask visitors a few simple questions to provide valuable consumer information to improve your understanding of customer needs and marketing by individual wineries.

The research has indicated a need for more knowledge on wine and this may present an excellent opportunity to collect names and addresses so that you can send these visitors wine information, details of new releases, wine tasting courses and festivals, and it could also be a marketing channel for direct selling.

While more than half of the wineries surveyed (61%) indicated they have a newsletter mailout this means of communication and promotion could be extended and integrated at an industry level to improve its coverage and overall cost effectiveness. The Margaret River Wine Industry Association could produce a newsletter which individual wineries distribute. This would reduce the cost allowing wineries to add their own information with inserts in the newsletter and to retain their own databases. Costs could be reduced by using software such as pagemaker and direct mail packages. This would permit the newsletter to be provided to the wineries on disk so that each winery can add their own page. You may also find that some visitors have email and this newsletter could be sent electronically which is inexpensive and again portrays an image of professionalism and an innovative wine industry.

A further development worth considering is a Margaret River Wine Club. Approximately one in ten visitors purchase their wine through wine clubs and the majority of cellar door visitors are highly educated professional people. The club could be promoted through the newsletter targeting clients in the winery databases as well as through professional associations across Australia.

Another element of in-house promotions requiring attention by some wineries is cellar door signage. The problem of having opening times displayed or incorrect times being posted were mentioned in the interviews with visitors. One person even stated visiting a winery at the stipulated opening time and not being able to find the door. Therefore having adequate and easily visible signage for the tasting area at the wineries is also critical. The display of well designed quality signs will provide easy access and portrays a welcoming image to the visitor.

The above recommendations would take some time and thought to plan and implement but the end result would be providing the visitor with a good wine tourism package and the information they have requested in the survey. This will be achieved most effectively through collaboration between the Tourism Association and the Wine Industry Association. Once this package is designed and in place, other than allocating someone responsible for continually updating and renewing supplies of promotional materials at all points of distribution established, there should be little or no cost required to keep the strategy in place.

Appendix 1 : Tables for the Figures included in the Report.

ATTRACTIONS VISITED IN THE REGION

ATTRACTIONS	PERCENTAGE
Wineries	92.5
Beach/Coast	74.1
Scenery/ Relaxation	65.5
Restaurants	62.5
Galleries	43.1
National Parks	35.1
Caves	31.9
Cheese Factory	31.3
Berry Farm	26.6
Wildflowers	24.8
Bushwalking	21.7
Augusta	20.5
Visit Relatives	9.9
Other Attractions	3.5
Town & Shops	1.0
Work/ Conference	1.0
Fishing	0.9
Wildlife	0.7

REASON FOR VISITING WINERIES

REASONS	PERCENTAGE
Tasting & Buying	97.5
Groups/tours	17.1
Return visit	65.5
Random Selection	46.7
Reputation	60.5
Winery Experience	17.7
Restaurants	32.3
Accommodation	0.6
Gallery/Products	3.9

VISITORS BY LEVEL OF EDUCATION

EDUCATION LEVEL	PERCENTAGE
Below year 12	9.8
Year 12	11.6
TAFE/Trade/Diploma	22.7
University	54.6
Other	1.3

VISITORS BY OCCUPATION

OCCUPATION	PERCENTAGE
Clerical/Sales	9.9
Tradesperson	3.6
Manager/Admin	22.3
Professional	44.5
Paraprofessional	2.0
Semi-skilled	2.3
Student	4.1
Home Duties	3.6
Retired	4.5
Self Employed	1.4
Other	1.7

WILL BE RETURNING TO THIS REGION BY PLACE OF RESIDENCE

RESIDENCE	Definitely Yes	Probably Yes
Perth metro area	93.8	6.2
Regional W.A.	85.1	14.9
N.S.W.	41.5	49.2
Victoria	61.1	38.9
South Australia	54.5	27.3
Queenslands	21.7	52.2
N.T.	66.7	33.3
A.C.T.	50.0	50.0
Tasmania	25.0	62.5
International	23.4	55.3

WINE PURCHASES

WHERE PURCHASED	**PERCENTAGE**
Retail Outlets	79.7
Wine Clubs	7.8
Wineries	10.8
Other	1.8

MARGARET RIVER WINES

	Very Good	Good	Fair	poor
Taste of Wine	78.4	20.0	1.3	0.2
Price of Wine	15.8	38.3	37.9	7.9
Value of Wine	25.2	47.1	24.9	2.8
Quality of Wine	56.9	40.2	2.5	0.4

FACTORS INFLUENCING BUYING DECISIONS

	very Important	Important
Friendliness of Staff	49.9	35.9
Courteousness of Staff	46.7	40.1
Quality of Service	45.6	42.8
Knowledge of Staff	55.7	30.7
Taste of the Wine	87.1	11.5
Quality of Wine	80.7	17.0
Price of the Wine	59.0	32.0

OPINION OF $2 TASTING FEE

	PERCENTAGE
Definitely Visit	23.8
Probably Visit	40.0
Probably not Visit	24.9
Definitely Not Visit	11.4

AMOUNT SPENT AT WINERY BY OPINION OF $2 TASTING FEE

AMOUNT SPENT	Probably not visit	would not visit
$0	21.8	12.7
$1 TO $50	32.1	12.1
$51 TO $100	24.1	16.1
$101 TO $200	26.1	5.7
$201+	17.2	8.6

MONTHLY EXPENDITURE ON WINE BY OPINION OF $2 TASTING FEE

AMOUNT SPENT	Probably not visit	would not visit
$0	24.7	9.6
$1 TO $50	29.8	13.1
$51 TO $100	21.0	12.7
$101 TO $200	26.3	10.1
$201+	17.4	6.5

MONTHLY NUMBER OF BOTTLES PURCHASED BY OPINION OF $2 TASTING FEE

AMOUNT SPENT	Probably not visit	would not visit
No Bottles	25.5	14.3
1 to 4 Bottles	24.9	11.9
5 to 8 Bottles	26.3	15.8
9 to 12 Bottles	24.4	7.3
13+ Bottles	21.9	3.1

KNOWLEDGE OF WINES

	PERCENTAGE
Highly Knowledgeable	3.7
Knowledgeable	48.7
Limited Knowledge	42.3
No Knowledge	5.4

INTEREST IN WINES

	PERCENTAGE
Highly Interested	35.6
Interested	52.2
Limited Interest	11.7
No Interest	0.5

ADDITIONAL INFORMATION REQUIRED ON REGION

INFORMATION	PERCENTAGE
Accommodation Information	54.0
Wineries Information	76.5
Restaurant Information	66.4
Wine Tasting Note Information	65.4
Activities Information	67.5
Opening time Information	69.2
Tourist Map information	83.3
Information Available Interstate	66.7

NEED FOR INFORMATION BY PERTH VISITORS

	PERCENTAGE
Accommodation	55
Wineries	77
Restaurants	71
Wine Tasting Notes	64
Activities	74
Opening Times	71
Tourist Maps	80

NEED FOR INFORMATION BY REGIONAL WA VISITORS

	PERCENTAGE
Accommodation	64
Wineries	87
Restaurants	77
Wine Tasting Notes	74
Activities	77
Opening Times	85
Tourist Maps	94

NEED FOR INFORMATION BY INTERSTATE VISITORS

	NSW %	VICTORIA %	OTHER STATES %
Accommodation	55	41	59
Wineries	72	73	58
Restaurants	60	50	63
Wine Tasting Notes	63	59	72
Activities	51	48	55
Opening Times	62	65	55
Tourist Maps	86	83	88
Information Available Interstate	77	66	90

NEED FOR INFORMATION BY INTERNATIONAL VISITORS

	PERCENTAGE
Accommodation	46
Wineries	60
Restaurants	55
Wine Tasting Notes	67
Activities	77
Opening Times	69
Tourist Maps	86
Information Available Outside WA	76

INFORMATION SOURCES

SOURCES	PERCENTAGE
Word of Mouth	65.2
Own knowledge	57.2
Sign Posts	33.1
Tourist Maps	43.9
Tourist Bureau	37.0
From Accommodation	9.3
In the Post	2.0
Travel guides	2.0
Wine Books	1.7
Other	3.4

Appendix 2: Cellar Door Visitor Questionnaire

CELLAR DOOR VISITOR WINERY SURVEY

Office Use Only (1-3) ☐☐☐

The Tourism and Wine Industry Associations of the Margaret River Region are aiming to better understand the needs of visitors so they can develop services better suited to your needs. We would appreciate if you would spare us five minutes of your time to complete this questionnaire. Participants that put their name on the attached list are eligible to enter a competition to win 6 bottles of Margaret River Region wine. All information collected is confidential.

1 HOW OFTEN DO YOU VISIT THE MARGARET RIVER REGION?
Please circle the one most appropriate answer/number.

First visit	1	
Second visit	2	
Once every 1-3 months	3	
Once every 4-6 months	4	
Once every 7-12 months	5	
Once every 12 months	6	
Less often than once every 12 months	7	(4)

2 HOW LONG ARE YOU STAYING IN THE MARGARET RIVER REGION?

______________________ days (5/6)

3 a) WHAT ATTRACTIONS HAVE YOU BEEN TO OR DO YOU PLAN TO GO TO DURING YOUR VISIT TO THE REGION?
Please circle all the attractions to be visited

Wineries	01	Beach/Coast	02	Bushwalking
	03			
Caves	04	Scenery/Relaxation	05	Galleries/Art & Craft
	06			
Restaurants	07	National Parks/Forest	08	Augusta/Lighthouse
	09			
The Berry Farm	10	Cheese Factory	11	Wildflowers
	12			
In the region to visit friends/relatives			13	

Other ______________________________________ (14-18) (7-30)

b) PLEASE RANK THE THREE **MAIN** ATTRACTIONS THAT BROUGHT YOU TO THE MARGARET RIVER REGION **IN ORDER OF IMPORTANCE.**
Please use the coding from 3(a) for the ranking; that is if the wineries was the most important attraction, caves the second most important attraction, and the cheese factory the third most important attraction you would answer the question 1 = 01, 2 = 04, 3 = 11. Other = 14. If all attractions are equally important to you answer only Part 4 with a tick.

1 = _______ (most important attraction) (31/32)

2 = _______ (second most important attraction) (33/34)

3 = _______ (third most important attraction) (35/36)

4 = _______ (99) All attractions are equally important. (37/38)

4 FOR THE MARGARET RIVER REGION WOULD YOU LIKE MORE INFORMATION ON:
Please circle yes (1) or no (2) for each question

	YES	NO	
Accommodation (Accommodation Guide)	1	2	(39)
Wineries (Guide of all the wineries, opening times & facilities)	1	2	(40)
Restaurants (Restaurant Guide)	1	2	(41)
Wine Tasting Notes	1	2	(42)
New and current activities (What's New Guide)	1	2	(43)
Opening times at attractions (ie opening times at wineries, caves, restaurants)	1	2	(44)
A detailed tourist map (with attractions, distances etc)	1	2	(45)
If an interstate tourist:			
Tourist information made more readily available interstate	1	2	(46)

5 WILL YOU BE RETURNING TO THIS REGION?
Please circle the one most appropriate answer/number

Definitely yes	1	Probably no	3	
Probably yes	2	Definitely no	4	(47)

6 a) WILL YOU VISIT THE MARGARET RIVER REGION WINERIES ON THIS TRIP?
Please circle the one most appropriate answer/number

Yes, I intend to visit the wineries on this trip	1	**Please go to Question 6b**	
Yes, I have already visited some of the wineries on this trip	2	**Please go to Question 6b**	
No, I do not intend to visit the wineries on this trip	3	**Please go to Question 17**	(48)

6 b) WHAT WINERIES HAVE YOU VISITED OR PLAN TO VISIT AND WHAT WERE/ARE THE MAIN REASONS FOR SELECTING/VISITING THESE WINERIES?

Total wineries to be visited? ____________

(49/50)

Please state the name of wineries visited		What were your reasons for visiting these wineries?	
1 ____________		____________	
2 ____________		____________	
3 ____________		____________	
4 ____________		____________	
5 ____________		____________	
6 ____________	(51-62)	____________	(63-74)

7 WHEN SELECTING WINERIES TO VISIT, ARE THE FOLLOWING FACILITIES IMPORTANT?
Please circle yes (1) or no (2) for each facility

FACILITY	YES	NO		FACILITY	YES	NO	
Restaurants/café	1	2	(75)	On site winery accommodation	1	2	(78)
Galleries/Arts & Crafts	1	2	(76)	Garden/Picnic Facilities	1	2	(79)
Local Produce	1	2	(77)	Children's Playground	1	2	(80)

8 WHERE DID YOU OBTAIN YOUR SOURCE OF INFORMATION ON THE WINERIES?
Circle as many numbers as appropriate

Word of mouth/recommendations	01	
Previous/personal knowledge	02	
Sign posts (passing by)	03	
Tourist map	04	
Brochures/tourist information from Augusta Margaret River Tourist Bureau	05	
Brochures/tourist information from other tourist centres	06	
Brochures/tourist information from your accommodation house/caravan park	07	
Literature received in the mail	08	
Other ____	09	(81-102)

9 HOW MUCH DID YOU SPEND OR INTEND TO SPEND ON THE FOLLOWING ITEMS **AT THE WINERIES** DURING THIS VISIT TO THE MARGARET RIVER REGION?

Arts & Crafts	$ _________	(103-105)
Restaurants	$ ________	(106-108)
Souvenirs	$ _________	(109-111)
Local Produce	$ ________	(112-114)
Wine	$ _________	(115-117)

10 a) APPROXIMATELY HOW MUCH DO YOU SPEND EACH MONTH ON WINE?

Total spent	$ ________	(118-120)
Number of bottles purchased	_____ bottles	(121-122)
Number of casks purchased	______ casks	(123-124)

b) Where do you buy **most** of your wine?
Please circle the **one** source where you buy **most** of your wine

Liquor store/retail outlets	1	
Wine club	2	
Wineries	3	
Other ________________	4-8	(125)

11 WHAT IS YOUR OPINION OF MARGARET RIVER WINES?
Please circle the most appropriate number for **each** attribute

	Very Good	Good	Fair	Poor	
The taste of Margaret River wines	1	2	3	4	(126)
The price of Margaret River wines	1	2	3	4	(127)
The value of Margaret River wines	1	2	3	4	(128)
The overall quality of Margaret River wines	1	2	3	4	(129)

12 HOW WOULD YOU RATE YOUR KNOWLEDGE OF WINES?
Please circle the one most appropriate answer/number

Highly knowledgable	1	Limited knowledge	3	
Knowledgable	2	Almost no knowledge	4	(130)

13 HOW WOULD YOU RATE YOUR INTEREST IN WINES?
Please circle the **one** most appropriate answer/number

Highly interested	1	Limited interest	3	
Interested	2	Almost no interest	4	(131)

14 HOW WOULD YOU RATE THE WINERIES ON THE FOLLOWING SERVICE ITEMS?
Please circle the most appropriate answer/number for **each** item.

	Very Good	Good	Fair	Poor	
Friendliness of staff	1	2	3	4	(132)
Courteousness of staff	1	2	3	4	(133)
Quality of the service	1	2	3	4	(134)
Staffs' knowledge of their wines	1	2	3	4	(135)

15 HOW IMPORTANT ARE THE FOLLOWING FACTORS IN INFLUENCING YOUR DECISIONS TO BUY **WINE AT THE CELLAR DOOR**?
Please circle the most appropriate answer/number for **each** factor.

	Very Important	Important	Slightly Important	Unimportant	
Friendliness of staff	1	2	3	4	(136)
Courteousness of staff	1	2	3	4	(137)
Quality of the service	1	2	3	4	(138)
Staffs' knowledge of their wines	1	2	3	4	(139)
Taste of the wine	1	2	3	4	(140)
Quality of the wine	1	2	3	4	(141)
Price of the wine	1	2	3	4	(142)

16 WHICH OF THE FOLLOWING BEST REFLECTS YOUR OPINION ABOUT A $2 TASTING FEE AT THE CELLAR DOOR OF WINERIES?
Please circle the **one** most appropriate answer/number

Would definitely still visit the wineries	1	
Would probably still visit the wineries	2	
Probably would not visit the wineries	3	
Definitely would not visit the wineries	4	(143)

The following details will enable the Margaret River Wineries and Tourism Board to know who their clientele are and to develop customer services to suit you, the Margaret River clientele

17 ARE YOU:

Male	1	Female	2	(144)

18 WHAT IS YOUR AGE? (145)

18-24 years 1 25-34 years 2 35-44 years 3 45-54 years 4 55 + years 5

19 WHAT IS YOUR NORMAL PLACE OF RESIDENCE?
Please circle the one most appropriate answer/number

Perth metropolitan	01	
Regional WA	02	
Interstate		
NSW	03	
Victoria	04	
SA	05	
Queensland	06	
Northern Territory	07	
ACT	08	
Tasmania	09	
International	10	
Resident of Margaret River region	11	(146-147)

20 INDICATE THE NUMBER OF ADULTS AND CHILDREN THAT YOU CAME TO THE WINERIES WITH ON THIS VISIT?

________________ Adults (148-149) ________________ Children (150-151)

21 WHAT IS YOUR **HIGHEST** LEVEL OF EDUCATION?
Please circle the one most appropriate answer/number

Up to Year 12 high school	1	
Completed Year 12 or equivalent	2	
TAFE/Trade Certificate/Diploma or equivalent	3	
University Qualification	4	
Other ________________	5	(152)

22 WHAT IS YOUR OCCUPATION?

Please circle the **one** most appropriate answer/number

Clerical or sales position	01	
Tradesperson	02	
Managerial/Administrator	03	
Professional (e.g. doctor, teacher, accountant, nurse)	04	
Paraprofessional (trained assistant e.g. paramedic, paralegal)	05	
Semi-skilled, labourer or related worker	06	
Student	07	
Home duties	08	
Unemployed	09	
Retired	10	
Other ________________	11	(153-154)

THANKYOU