Food and Wine Tourism in Western Australia

Summary

MAY 2014
FOOD AND WINE TOURISM IN WESTERN AUSTRALIA

SUMMARY

Food and wine tourism is an important element in the visitor experience in Western Australia (WA). In 2013, leisure travel in WA was worth $4.6 billion and an estimated 1.1 million visitors participated in food and wine activities while on holiday or on a day trip. 1

Given the importance of this segment to WA’s economy, Tourism Research Australia and Tourism Western Australia contracted TNS to conduct a study on food and wine visitors to the state. The research was conducted in January to February 2014.

This report summarises the key findings from the research, and includes:

- a profile of domestic food and wine visitors to WA
- visitor motivations in choosing their holiday destination
- experiences sought by visitors to WA
- the importance of food and wine tourism to WA visitors, and satisfaction with their experiences in WA’s tourism regions.

METHODOLOGY

In January to February 2014, an online survey was conducted with Australian residents who had holidayed in WA in the two years prior. Visitors who indicated no interest in food and wine tourism experiences—beyond the basic necessities of eating and drinking—were not included in the survey beyond this point. Food and wine tourism was defined for the purposes of this research as:

‘Doing things that give you the opportunity to experience the destination’s food, wine and other beverages, local cuisine and produce while on holiday. This could range from eating at a restaurant, visiting a winery or brewery, exploring a local food market, to participating in a cooking class’.

A total of 750 participants completed the survey (data was not weighted) and comprised:

- 501 intrastate participants
- 249 interstate participants.

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1 Source: Tourism Research Australia, National and International Visitor Surveys, Year Ending December 2013
KEY MESSAGES

Overall, WA’s food and wine experiences compared favourably to similar experiences in other Australian states and territories—55% of visitors reported it compared quite well or extremely well. However, this study identified a number of key drivers in attracting visitors to WA:

1. LOCAL AND AUTHENTIC
Local produce and regional specialities have the broadest appeal among food and wine visitors. Leveraging local offerings should be considered over developing more niche experiences.

2. BEAUTIFUL/SPECTACULAR SURROUNDINGS
This aspect consistently rated as important to visitors—operators should make the best use of their environment.

3. EVENTS
Visitors who go to one event are likely to go to another (and another)—the opportunities for cross-promotion are high, with one of the best avenues to promote a food/wine event being another food/wine event.

4. RANGE OF OFFERINGS
Broaden appeal by broadening options (e.g. offering a range of dining options, from casual to more formal).

5. INFORMATION SOURCES
Friends/family and the internet were the most common sources of information for visitors seeking food and wine experiences in WA—maintaining a high impact web presence and presenting a good first impression will benefit operators.
WHAT ARE THE MOST IMPORTANT FACTORS TO VISITORS WHEN CONSIDERING A HOLIDAY DESTINATION?

Unique or extraordinary sights is the most influential factor for holidays in general. Offering good food, wine, local cuisine and produce ranks as the fourth most influential factor, with almost two-thirds of visitors rating this aspect as an important consideration when selecting a holiday destination.

FIGURE 1: IMPORTANCE OF FACTORS WHEN CHOOSING A HOLIDAY DESTINATION

WHAT ARE THE MOST IMPORTANT FACTORS TO VISITORS WHEN CONSIDERING A HOLIDAY DESTINATION IN WESTERN AUSTRALIA?

When asked which of the same factors were important when considering a holiday in WA, the ability to explore by car became the highest ranked factor, pushing good food, wine, local cuisine and produce to the fifth most important factor for destination choice in WA.

FIGURE 2: IMPORTANCE OF FACTORS WHEN CHOOSING A HOLIDAY DESTINATION IN WESTERN AUSTRALIA
WHAT INFORMATION SOURCES DID VISITORS USE TO PLAN THEIR TRIP TO WA?

Recommendations from friends/family and Google searches were the most commonly used sources for information about food and wine experiences in WA among both intra and interstate visitors.

Not surprisingly, intrastate visitors were more likely to rely on previous experience as a guide, while interstate visitors relied more heavily on visitor information centres.

FIGURE 3: INFORMATION SOURCES FOR FOOD AND WINE EXPERIENCES IN WA

WHAT EXPERIENCES WERE FOOD AND WINE VISITORS LOOKING FOR?

Figure 4 shows the approximate number of visitors to WA (per year) according to their interest level in food and wine experiences.

FIGURE 4: FOOD AND WINE TOURISM VISITORS TO WA

Sources: TNS, Survey of Food and Wine Visitors to Western Australia, 2014; Tourism Research Australia, National Visitor Survey, Year Ending September 2013.
Further, the research identified 5 distinct groups of food and wine visitors, each with their own expectations of food and wine experiences on a trip to WA:

**LOW INTEREST (23%)**
Showed only slight interest in food and wine tourism experiences generally and did not express a high degree of interest in any particular type of experience.

**LOCAL AUTHENTICITY (39%)**
Use food and wine experiences as a tool for exploring or immersing themselves in a location—its people, culture and environment. They express high interest in experiences such as:
- authentic local produce
- street food
- local and farmers markets
- regional specialities
- eating/drinking in spectacular surroundings.

**TRADITIONALISTS (10%)**
Showed the most interest in the ‘classic’ experiences associated with food and wine tourism:
- heritage of food and wine culture
- fine dining restaurants
- wineries
- food/wine tours
- food/wine trails
- events/festivals.

When considering specific food and wine tourism experiences, *regional specialities, local produce and dining location* (at the beach/spectacular surroundings) generate the most interest among both intra and interstate visitors to WA.
GENERALISTS (23%)
Showed a moderate level of interest in most types of food and wine experiences, with no particular preference for types of experiences.

NICHE EXPERIENCERS (6%)
Interested in the more intensive, involved and niche food and wine experiences. They expressed the highest interest in:
- hands-on experiences
- cooking courses
- locally caught seafood
- Indigenous food experiences.

WHAT FACTORS MOTIVATE VISITORS TO ENGAGE IN FOOD AND WINE TOURISM EXPERIENCES?
Visitors considered that the factors most important in influencing them to participate in the following food and wine experiences were:

FOOD OR WINE/DRINK TOURS
- Takes place in beautiful or spectacular surroundings (important to 86% of respondents)
- Ability to experience the best produce that is available locally (83% important)
- Is unique to the area (81% important)
- Offers the chance to visit a lot of places (79% important).

FOOD OR WINE EVENTS/FESTIVALS
- Offers local food/produce that is unique to the area (88% important)
- Takes place in beautiful or spectacular surroundings (86% important)
- Is an authentic local event (84% important)
- Has a vibrant atmosphere (82% important)
- Has a wide range of produce available (81% important).

Attending a regional event means you are more likely to attend another regional event. However, metro event attendees are generally no more likely to attend another metro event than are regional event attendees. Accordingly, the best place to advertise a regional event is at another regional event!

WINERIES
- Offers wines at a range of prices (87% important)
- Is situated in beautiful or spectacular surroundings (86% important)
- Offers casual dining (79% important).

RESTAURANTS
- Provides very good service (87% important)
- Has a good range of dishes (82% important)
- Has a good atmosphere/ambiance (82% important)
- Makes use of locally-sourced, fresh ingredients (76% important)
- Is in beautiful or spectacular surroundings (70% important).
WERE VISITORS SATISFIED WITH THEIR REGIONAL FOOD AND WINE EXPERIENCES?

By aligning the importance of food and wine tourism to visitors in WA’s tourism regions with their satisfaction levels, the performance of each region (in terms of delivering on visitor expectations) can be seen (Figure 6). The bubble size represents the total number of leisure visitors (includes those who travelled for holiday and/or to visit friends and relatives) to WA in year ending September 2013, multiplied by the proportion of the sample who visited each of the five regions.

FIGURE 6: IMPORTANCE OF, AND SATISFACTION WITH, FOOD AND WINE TOURISM BY REGION

REGIONAL OPPORTUNITIES

A number of opportunities exist to realise the potential of the food and wine tourism industry in each region:

AUSTRALIA’S SOUTH WEST (INCLUDING MARGARET RIVER)

It is expected Australia’s South West will provide food and wine experiences—and it delivers in the minds of visitors. There were high levels of satisfaction across restaurants, tours and wineries (in particular). However, satisfaction for food and wine events in the region were mixed.

Remaining competitive against other wine regions in Australia is key for this region. More information—especially for interstate tourists—will improve access and awareness of the variety of experiences available in the region.

EXPERIENCE PERTH

As visitors to Experience Perth travel there for a broader range of experiences than they do to Australia’s South West, food and wine tourism is of less importance to Experience Perth. However, there is room for improvement, as Perth’s food and wine offering was described as ‘sufficient’ rather than ‘sparkling’ by respondents.

AUSTRALIA’S NORTH WEST

Compared to Australia’s Coral Coast and Australia’s Golden Outback, Australia’s North West attracted the highest levels of satisfaction with its food and wine tourism offering. A core of very high quality experiences—and a desire for more of the same from visitors—indicates Australia’s North West has a high potential for further development.

AUSTRALIA’S CORAL COAST AND AUSTRALIA’S GOLDEN OUTBACK

With fewer culinary experiences on offer, visitors to both Australia’s Coral Coast and Australia’s Golden Outback were not motivated by food and wine to visit these areas. Road travel dominates in these regions, providing an opportunity to offer food and wine experiences en route to the final destination.

In these regions, food and wine tourism is primarily focused on restaurants and cafes. Restaurants and cafes should operate at a quality level and promote local produce, which would give them the edge they need to compete in WA’s food and wine market.

Source: TNS, Survey of Food and Wine Visitors to Western Australia, 2014