

SNAPSHOTS

2009

FOOD AND WINE TOURISM IN AUSTRALIA

2009



Australian Government
Department of Resources, Energy and Tourism
Tourism Research Australia

This snapshot presents information on the food and wine sector and a profile of the domestic overnight and international visitors who participated in these activities.

Definition

A winery visitor is defined as a domestic or international visitor who visits at least one winery during their trip in Australia. 'Other visitors' are defined as those who do not visit a winery during their trip in Australia.

What were the trends in wine tourism?

In 2009, 660,000 international visitors visited a winery. International winery visitors have been increasing at a faster rate than total international visitors since 2000 (average annual rate of 5% compared to 1%). International visitors have a greater propensity to visit wineries than domestic visitors.

Domestic overnight winery visitors have increased at an average annual rate of 2% since 2000, despite a decline in the total domestic overnight market during this period (-1%). There was a decline in domestic overnight winery visitor numbers during 2009 which was in line with a decline in the total domestic market.

Table 1 Visitor numbers and nights for winery visitors

	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	Winery visitors	Average annual change % Total visitors
International												
Visitors ('000)	437	480	486	524	579	666	696	714	684	660	5%	1%
Nights ('000)	22,861	23,135	24,509	24,844	29,469	30,116	34,085	35,638	35,757	35,526	5%	5%
Average length of stay	52	48	50	47	51	45	49	50	52	54		
Share (%)	9.6	10.7	10.9	12	12.1	13.2	13.6	13.7	13.2	12.8		
Domestic overnight												
Visitors ('000)	1,854	1,938	2,059	2,283	2,369	2,146	2,585	2,782	2,289	2,245	2%	-1%
Nights ('000)	9,974	11,890	11,232	13,271	13,112	11,431	14,189	16,424	13,325	11,824	2%	-1%
Average length of stay	5	6	5	6	6	5	5	6	6	5		
Share (%)	2.5	2.6	2.7	3.1	3.2	3.1	3.5	3.8	3.2	3.4		
Domestic day												
Visitors ('000)	1,756	1,608	1,935	2,051	1,680	1,963	2,340	2,453	2,093	1,860	1%	-1%
Share (%)	1.1	1.1	1.4	1.5	1.3	1.5	1.7	1.7	1.5	1.3		

Table 2 International winery visitors by expenditure, length of stay and proportion, 2009

Country/region of origin	Winery visitors ('000)	Proportion of winery visitors* %	Average stay Nights	Expenditure per trip \$	Expenditure per night \$
United Kingdom	139	22	48	6,729	140
USA	68	15	40	7,523	190
New Zealand	53	5	21	2,833	133
Singapore	44	18	36	5,904	163
China	35	10	70	11,241	161
Korea	33	20	76	7,955	105
Malaysia	28	14	54	7,227	133
Japan	26	8	61	7,414	122
Canada	25	21	63	9,168	145
Germany	24	16	69	8,341	122
Scandinavia	15	19	48	8,751	184
Switzerland	9	23	55	12,074	220
India	7	6	93	12,560	135
Other Europe	60	16	76	8,686	114
Other Asia	63	12	60	6,819	113
Other countries	30	8	60	8,879	147
Total	660	13	54	7,415	138

* Wine visitors as a percentage of total visitors from each country.

Domestic day winery visitors have experienced similar growth patterns to domestic overnight visitors. There has been an increase in domestic day winery visitors since 2000 (average annual growth 1%) despite a downward trend in total domestic day visitors. Market share for domestic day winery visitors declined to 1.3% in 2009, down from 1.5% in 2008.

Who were winery visitors?

Almost a third (30%) of international winery visitors were aged between 20 and 29 years. Since 2000, the largest growth in international winery visitors has been from visitors aged 15 to 19 years (average annual growth 8%) and from older visitors aged 60 years and over (average annual growth 7%).

The top three countries of origin for winery visitors to Australia were the United Kingdom (21%), the USA (10%) and New Zealand (8%). Proportionally, visitors from Switzerland (23%), the UK (22%), Canada (21%) and Scandinavia (21%) were more likely to visit a winery, while 5% of visitors from New Zealand and 6% of those from India were less likely to visit a winery.

Domestic overnight and day winery visitors tended to be older, with almost half (48%) of domestic overnight visitors and over half (51%) of domestic day winery visitors aged 50 years and over.

Domestic overnight visitors predominantly came from New South Wales (33%), Victoria (27%) and Western Australia (16%) and domestic day visitors from South Australia (27%), Victoria (26%) and New South Wales (21%).

Domestic overnight winery visitors were more likely to be on a package tour (10%) compared to other domestic visitors (5%).

How much did they spend?

International winery visitors spent \$4.9 billion on trips to Australia in 2009. While winery visitors spent less per night than other visitors, they spent more per trip (\$7,415) compared to other international visitors (\$4,731). This higher spend was predominantly due to the longer length of stay of international winery visitors. On average, winery visitors from Switzerland (\$220), the USA (\$190) and Scandinavia (\$184) had the highest spend per night.

Domestic overnight winery visitors spent \$2.2 billion on their trips during 2009, and they spent more per person (\$997) than other domestic overnight visitors (\$629). This spend was on their total trip, not just food and wine. This higher spend can be attributed to a higher average length of stay (6 nights for domestic overnight winery visitors compared to 4 nights for other domestic overnight visitors).

Where did they go?

New South Wales and Victoria were the most popular winery destinations for international and domestic overnight visitors. Domestic overnight visitors were more likely to spend nights in regional Australia than international visitors with almost three quarters (73%) of domestic overnight visitors having spent nights in regional Australia compared to less than a quarter (23%) of international visitors.

Victoria and South Australia had the highest number of day trip winery visitors in 2009.

Where did they stay?

Rented house or apartment was the most popular type of accommodation for international winery visitors with 39% of their total nights spent in this form of accommodation. Almost a quarter (23%) of nights were spent at a friend's or relative's house by international visitors.

Staying at a friend's or relative's property (29% of nights) or in a hotel, resort, motel or motor inn (29% of nights) were the most popular accommodation types for domestic winery visitors in 2009.

How did they get information?

The internet was the most popular information source for both international (52%) and domestic overnight winery visitors (49%). Friends and relatives living in

Australia (30%) and travel agents (25%) were also used by international visitors, while previous visits (18%) and friends and relatives (17%) were other information sources used among domestic overnight visitors.

Supplementary data

Supplementary questions regarding food and wine tourism visitors were included in the 2009 International Visitor Survey and National Visitor Survey. The following is an analysis of some of the results from the supplementary survey.

How many wineries did they visit?

Over half (56%) of international winery visitors and almost two thirds (64%) of domestic winery visitors visited more than one winery. Almost a quarter of winery visitors from Europe (23%), North America (22%) and New Zealand (22%) visited five or more wineries.

What did they do?

The most popular activities for both international and domestic visitors at wineries were wine tasting, purchasing wine and eating or drinking at the restaurant or café. International winery visitors (21%) were more likely to participate in a guided tour of the winery than domestic winery visitors (12%). Domestic winery visitors (31%) were more likely to purchase produce at the winery than international visitors (12%).

Table 3 Activities undertaken at wineries, 2009

	International %	Domestic
Wine tasting	87	82
Purchase wine to take away	47	70
Eat/drink at restaurant/café	31	41
Sample produce at the winery	26	37
Guided tour of the winery	21	12
Purchase produce at the winery	12	31
Undertake or watch a live cooking class or demonstration	2	1
Educational wine course	1	2

What regions did they visit?

The most popular wine regions for international winery visitors were the Hunter Valley (21%), Margaret River (16%) and Swan Valley (15%). For domestic overnight visitors, the most popular regions were the Margaret River (16%), Hunter Valley (16%) and Barossa Valley (7%).

Table 4 Most popular wine regions, 2009

	Winery visitors	Domestic	Winery visitors
International			
Hunter Valley, NSW	21%	Margaret River, WA	16%
Margaret River, WA	16%	Hunter Valley, NSW	16%
Swan Valley, WA	15%	Barossa Valley, SA	7%
Yarra Valley, Vic	13%	North-East Victoria	6%
Barossa Valley, SA	11%	Mornington Peninsula, Vic	5%
Gold Coast and Hinterland, Qld	5%	Yarra Valley, Vic	4%
McLaren Vale, SA	5%	McLaren Vale, SA	3%
Mornington Peninsula, Vic	4%	Clare Valley, SA	3%
Adelaide Hills, SA	3%	Mudgee, NSW	2%
Clare Valley, SA	1%	Granite Belt, Qld	2%

How many wineries are there?

There were 1,647 wineries in Australia with cellar door facilities at April 2010, an increase of 2% on the previous year. Victoria had the largest number of wineries with cellar door facilities, while Queensland had the largest proportion of wineries with cellar doors. Of those wineries with cellar door facilities, 30% had an onsite resaturant/served light meals.

Table 5 Winery facilities by state/territory, April 2010

State/ territory	Wineries	Cellar door facilities	% of cellar doors	Onsite café/ restaurant/ light meals	Onsite accommodation
Vic	724	522	72	173	60
SA	648	348	54	98	34
NSW/ACT	467	351	75	87	69
WA	372	264	71	88	29
Qld	111	94	85	38	21
Tas	98	68	69	15	7
Total	2,420	1,647	68	499	220

Data sources

Tourism Research Australia National Visitor Survey (NVS) and International Visitor Survey (IVS), 2000–2009 (unpublished data).
Tourism Research Australia Destination Visitor Survey (DVS) (unpublished data).
All figures refer to persons over the age of 15 years.
Table 5: Winetitles wine industry database 2010

Key findings

- Visitors to wineries increased between 2000 and 2009, with average annual increases for international (5%), domestic overnight (2%) and domestic day visitors (2%).
- A large proportion of domestic winery visitors were over the age of 50 years, with 48% of domestic overnight visitors and 51% of day visitors aged 50 years or over.
- Domestic overnight winery visitors spent more on average per night and per trip than other visitors.
- The majority of winery visitors travelled for the purpose of holiday, accounting for 56% of international visitors, 71% of domestic overnight visitors and 84% of domestic day visitors.
- International winery visitors comprised 13% of the total international market in Australia.
- The top three countries of origin for winery visitors to Australia were the United Kingdom (21%), the USA (10%) and New Zealand (8%).

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