
EXECUTIVE SUMMARY

In December 2002 the South Australian Tourism Commission commissioned Colmar Brunton Pty Ltd to undertake a market research study of wine tourism in South Australia.

The main objective of the research was to update the cellar door research conducted in 2000 and to provide a broad understanding of the structure of the wine tourism market and the motivations and characteristics of wine tourists.

The research methodology consisted of 6 focus groups undertaken in Adelaide, Melbourne and Sydney and 897 interviews conducted with randomly selected cellar door visitors in March, April and May 2003 in the Barossa, Clare Valley, Fleurieu Peninsula, Limestone Coast, Adelaide Hills and the Riverland.

The research found that, in aggregate, based on a 12 month benchmark period¹, there was a total of 810,000 daytrip and 270,000 overnight visitors to the six regions with these visitors accounting for 4.75 million cellar door visits and 610,000 visitor nights. The average number of cellar door visits per visitor per region was 4.4.

The number of net cellar door visitors was estimated to be 960,000 (after allowing for visits to more than one wine region during the same trip).

Wine tourists spent an estimated \$64.6 million purchasing 3.9 million bottles of wine at cellar doors.

Total spending by cellar door visitors over the 12 month reference period on all aspects of their trip in South Australia was estimated to be \$500 million (for many of these visitors cellar door experiences were not the main reason for their visit – 59% of the respondents stated that the opportunity to visit a wine region or a cellar door had been the main influence or an important influence on their decision to visit).

Cellar door visitors were evenly distributed across age groups up to 60 years of age. Almost half (47%) of the respondents were employed in professional jobs and were more likely to travel with friends / relatives without children (41%) or with their spouse / partner without children (36%). Almost three quarters (74%) travelled in the wine region in their own vehicle, 10% travelled in a hire car, 7% travelled with a commercial tour operator while a further 5% travelled independently in a minibus, bus or train. Of the overnight visitors 40% stayed in a hotel/motel, 20% stayed in a guesthouse, cottage or B&B and 12% stayed in a caravan park.

The factors most likely to be rated as important or very important in the decision to visit a wine region were 'to relax and unwind' (91%); 'it's a wine producing area' (86%); 'experiencing the country, vineyards, scenery' (83%) and 'wine tasting at cellar door' (81%).

When compared to the 2000 survey the estimated visitors to the 5 regions covered by that survey had increased by 17%². Overnight visitors had increased by 18% while daytrip visitors had

¹ Based on benchmark data for the year 2001/02 from the Bureau of Tourism Research.

² Note that the increase has been influenced to some extent as a result of a boundary change for the Fleurieu Peninsula.

increased by 16%. This compares to an overall increase of 2% in overnight visitors in the State between 1999 and 2002 and a fall of around 10% in domestic daytrips over the same period.

There was also a substantial increase in visitor satisfaction on the basis of 'availability of food at cellar door' up from 40% to 62% at the 2003 survey and 'quality of food at cellar door' up from 46% to 71% at the 2003 survey. Improvement was also noted with respect to the availability of maps and brochures and the quality of maps and brochures.

1. INTRODUCTION

This report summarises and discusses the results of a market research project undertaken to examine wine tourism in South Australia.

The primary aim of the research was to investigate the structure of the wine tourism market and to provide a basis for the development of wine tourism product at the regional level.

The research updates the results of a previous research project on this market conducted by the SATC in 2000³.

The specific objectives of the project were to determine:

- Understanding of expectations of wine tourists and satisfaction with cellar door experience.
- Tracking changes in wine tourist visitation, particularly changes in satisfaction with elements of the experience since the 2000 survey.
- Use and satisfaction with various wine tourism visitor information material such as glove box book, wine trail brochures etc.
- Role of cellar doors/wine regions as trip motivators.
- Identification of market segments within the wine tourism market based on trip motivations.
- Expenditure associated with trip including expenditure of different market segments and identification of high yield segments.
- Understanding of perceptions held of SA wine tourism product relative to interstate product.
- Understanding of image of various SA wine regions including points of differentiation and opportunities for market positioning of various regions.
- Understanding of characteristics of visitors to cellar doors and wine regions (e.g. socio-demographics).
- Understanding of nature of visits to cellar doors and wine regions.
- Understanding of expectations and motivations of SA's interstate Most Profitable Prospects⁴ in visiting cellar doors and the potential to increase participation in wine tourism among this segment.
- Identification of potential gaps in the wine tourism experience offered in South Australia and opportunities to improve and extend the experience SA offers including new wine tourism product and linkages with other tourism product and experiences.

To meet these objectives a program of market research was commissioned involving 6 focus groups in Adelaide and interstate and 897 interviews conducted on a face to face basis with visitors at winery cellar doors in the Barossa, Clare Valley, Fleurieu Peninsula, Limestone Coast, Adelaide Hills and Riverland. The cellar door interviews were conducted in March, April and May 2003.

The research was undertaken by an independent market research consultancy, Colmar Brunton Pty Ltd.

³ SATC, 2001. Wine Tourism Market Research.

⁴ Consumers with a preference for SA as a travel destination who spent at least \$200 per person per night or \$2,000 in total on their last trip.

Survey estimates are derived from weighted survey data. Benchmarks for weighting purposes were derived from the National Visitor Survey and International Visitor Survey for the year to June 2002 (Bureau of Tourism Research). The weighted results provide an estimate of market size and structure over a 12 month period.

When compared to the 2000 survey, differences in the results may be due to the time of the year at which the research was conducted. The current survey was undertaken over the autumn period while the 2000 survey was conducted over a shorter period in early spring.

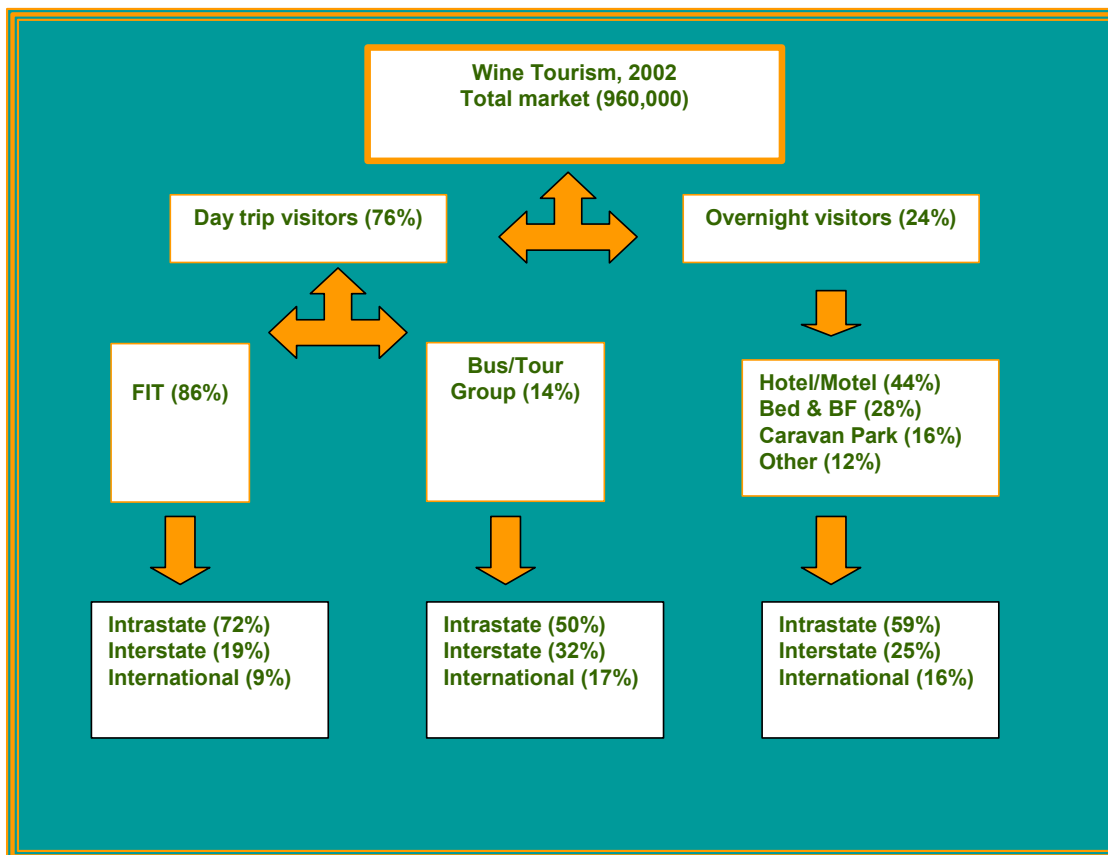
There were also boundary changes for the Fleurieu Peninsula over this period that would have influenced the benchmark data for that region.

2. MARKET STRUCTURE

The market for wine tourism can be structured on the basis of region, overnight vs daytrips and mode of transport. The information presented in regard to overall demand is derived from the Bureau of Tourism Research benchmark data and the results of the cellar door research.

Market structure is summarised below in Figures 2.1 to 2.7.

Figure 2.1 - Total Market⁵



The market structure is defined on the basis of BTR benchmarks (NVS & IVS, year to June 2002) and cellar door survey results. Cellar door visitors may visit more than region during their trip. The total market figure is a net figure and is not equivalent to the sum of the estimated visits to each region presented in Tables 2.2 to 2.7.

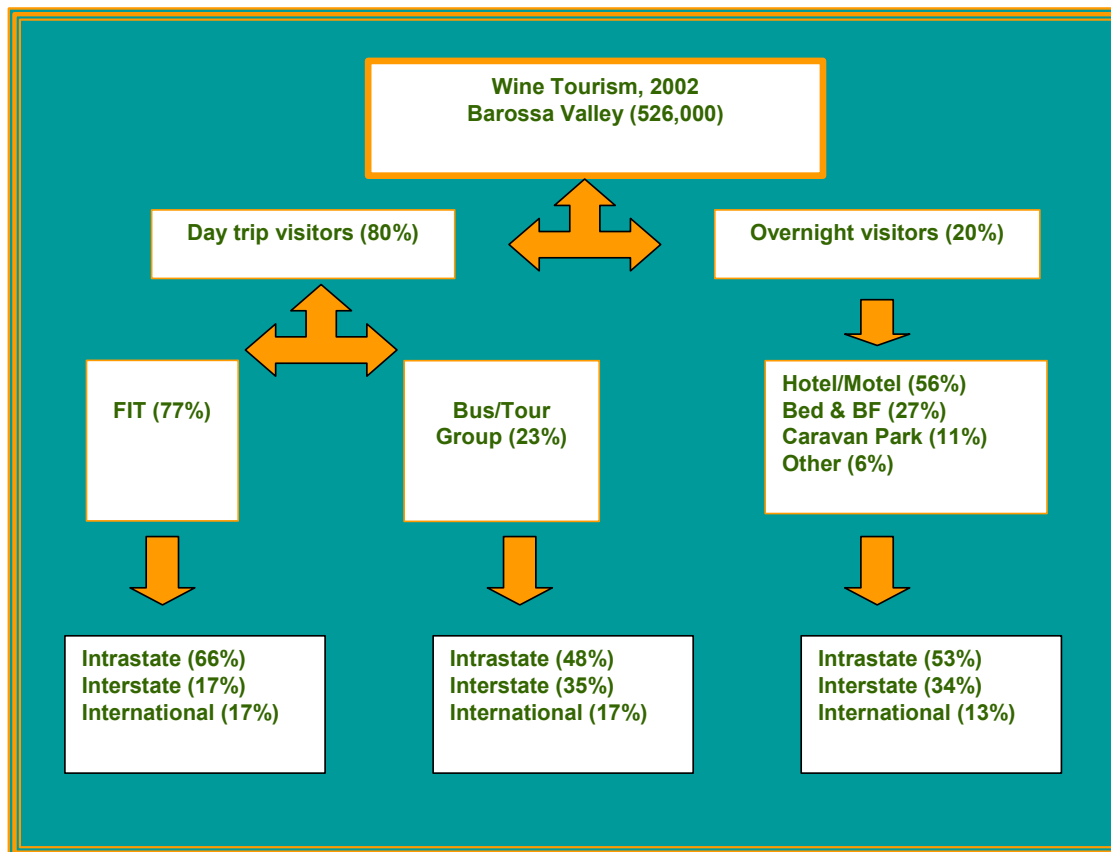
FIT – Free and independent traveller.

On the basis of the research results it is estimated that total cellar door attendances over the 12 month reference period was around 4.75 million with these visitors staying for 610,000 visitor nights in the six regions surveyed.

⁵ Regions in-scope for the study were the Barossa, Clare Valley, Fleurieu Peninsula, Limestone Coast, Adelaide Hills and the Riverland.

At State level⁶ there were an estimated 960,000 visits (daytrip and overnight) that included a visit to one or more cellar door.

⁶ Allowing for visits to 2 or more regions during the one trip. The aggregate of visits to each region is 1,080,000.

Figure 2.2 Barossa

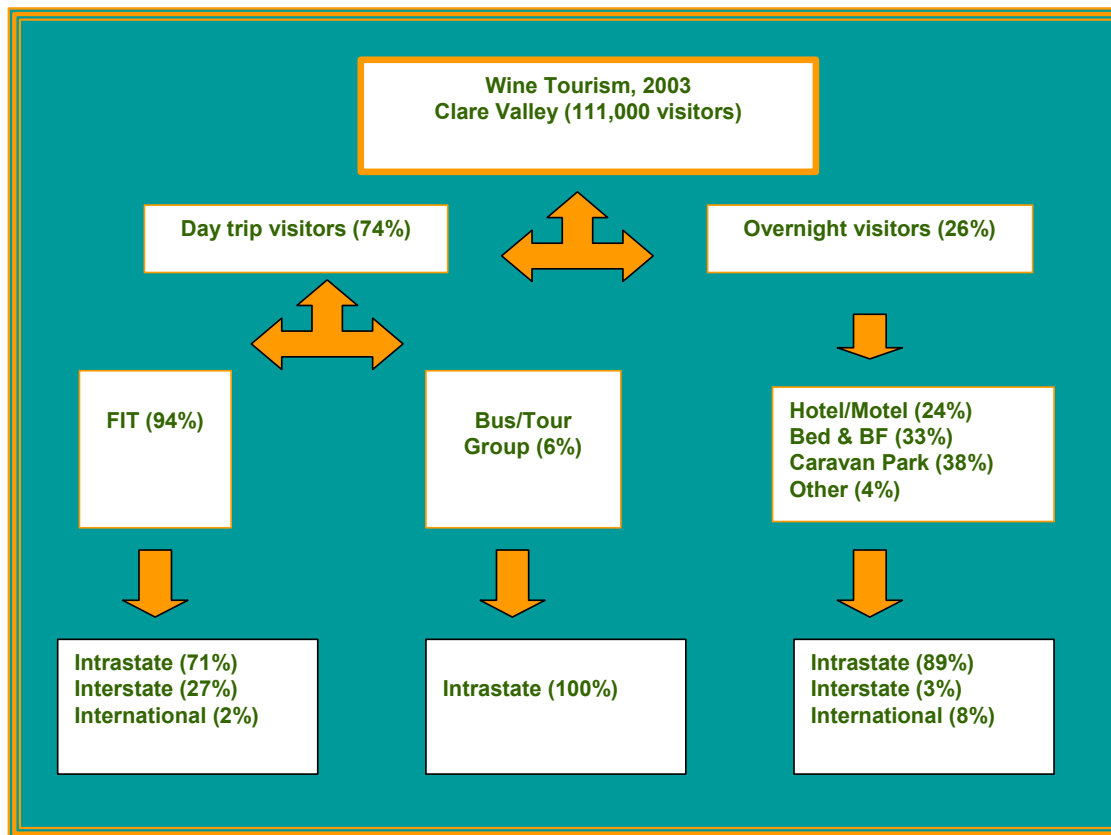
The market structure is defined on the basis of BTR benchmarks (NVS & IVS, Year to June 2002) and cellar door survey results. Day trip visitors include interstate and overseas visitors to the State who are staying elsewhere and taking a daytrip to the Barossa region.

FIT – Free and independent traveller.

Day trip visitors to the Barossa attended 4.2 cellar doors per trip in the region, on average, whilst overnight visitors attended 6.2 cellar doors and stayed for 2.2 nights on average in the region. This equates to 2.4 million cellar door visits and 230,000 visitor nights.

The total length of trip for overnight visitors interviewed in the Barossa (including their stay elsewhere) was 1.8 nights for SA residents, 7.7 nights for interstate residents and 15.7 nights for overseas residents.

12% of the Barossa sample had children aged less than 18 years in their travel party.

Figure 2.3 Clare Valley

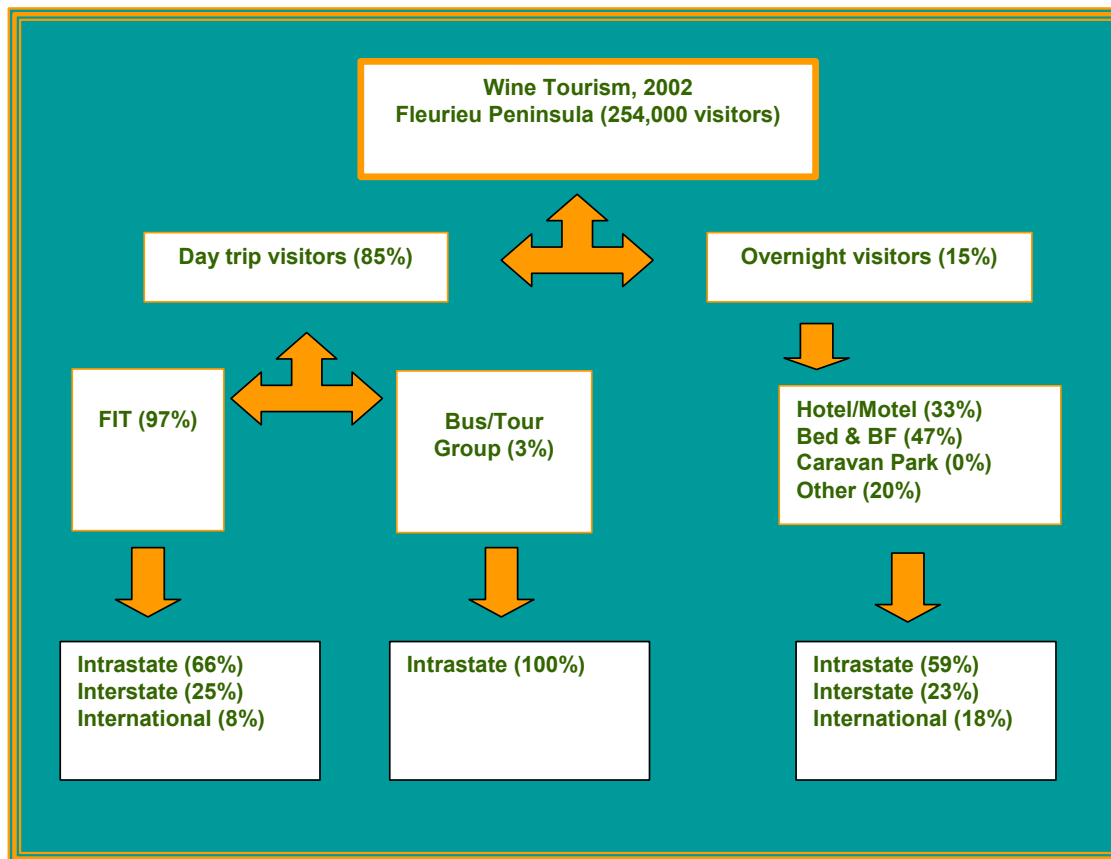
The market structure is defined on the basis of BTR benchmarks (NVS & IVS, year to June 2002) and cellar door survey results. Day trip visitors include interstate and overseas visitors to the State who are staying elsewhere and taking a daytrip to the Clare Valley.

FIT – Free and independent traveller.

Day trip visitors to the Clare Valley attended 3.6 cellar doors per trip, on average, in the region, whilst overnight visitors attended 5.0 cellar doors and stayed for 2.1 nights on average in the region. This represents around 444,000 cellar door visits and 59,000 visitor nights.

The total length of trip for overnight visitors interviewed in the Clare Valley (including their stay elsewhere) was 2.5 nights for SA residents, 15.2 nights for interstate residents and 73.9 nights for overseas residents.

16% of the visitors interviewed in the Clare Valley had persons aged less than 18 years in their travel party.

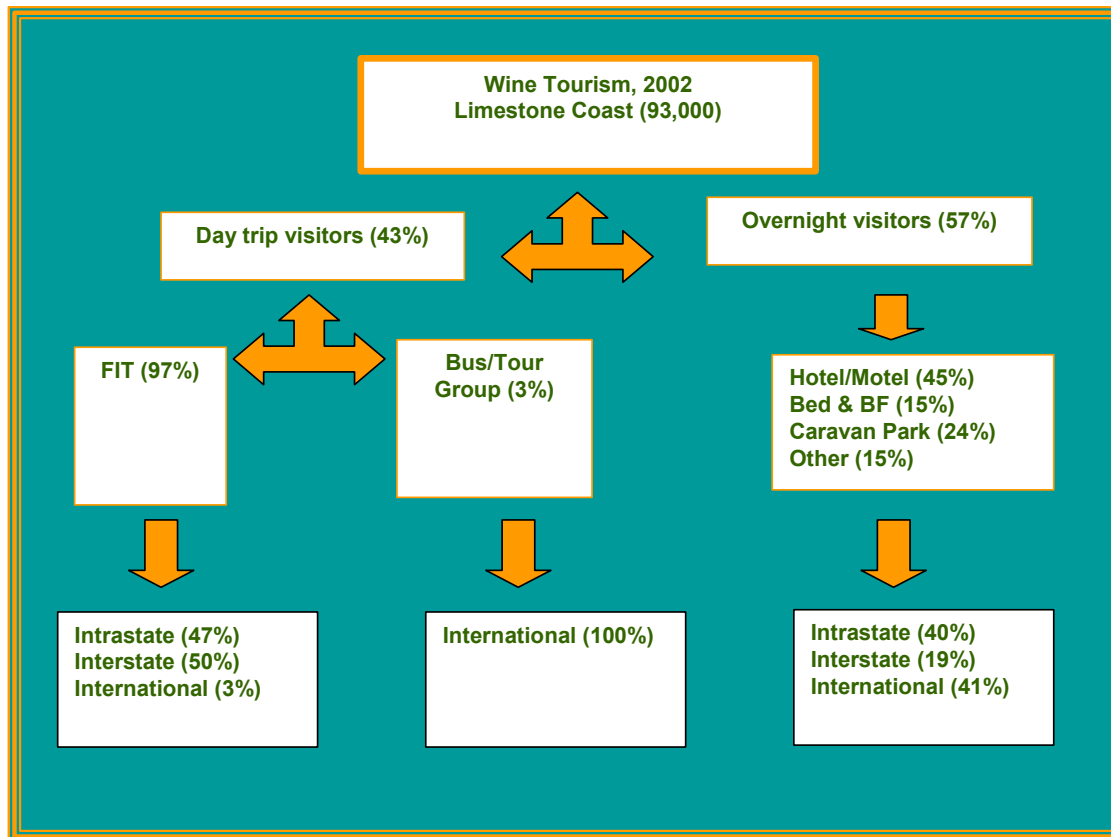
Figure 2.4 Fleurieu Peninsula

The market structure is defined on the basis of BTR benchmarks (NVS & IVS, year to June 2002) and cellar door survey results. Day trip visitors include interstate and overseas visitors to the State who are staying elsewhere and taking a daytrip to the McLaren Vale / Fleurieu Peninsula region.
FIT – Free and independent traveller.

Day trip visitors to the Fleurieu Peninsula attended 4.3 cellar doors per trip in the region, on average, whilst overnight visitors attended 6.0 cellar doors and stayed for 2.1 nights on average in the region. This represents around 1.15 million cellar door visits and 80,000 visitor nights in the region.

The total length of trip for overnight visitors interviewed in the Fleurieu Peninsula (including their stay elsewhere) was 2.2 nights for SA residents, 7.7 nights for interstate residents and 18.8 nights for overseas residents.

10% of the cellar door visitors interviewed in the Fleurieu Peninsula region had persons aged less than 18 years in their travel party.

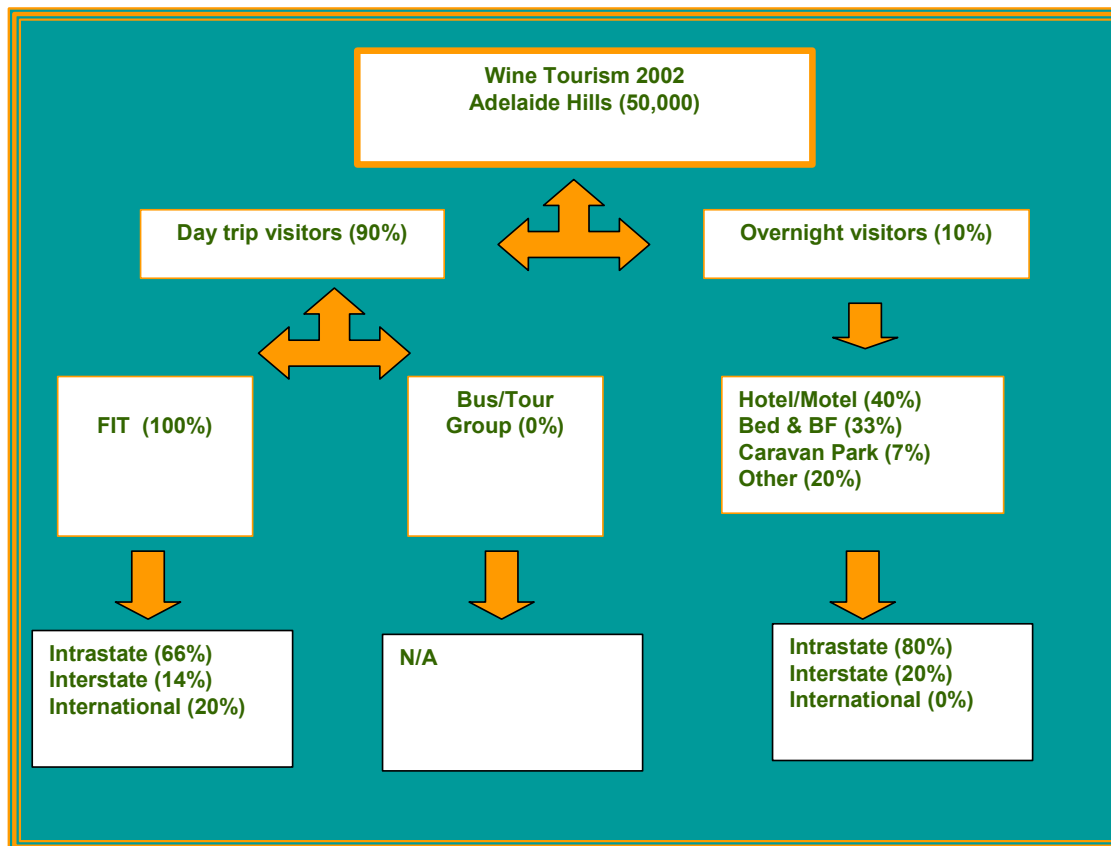
Figure 2.5 Limestone Coast

The market structure is defined on the basis of BTR benchmarks (NVS & IVS, year to June 2002) and cellar door survey results. Day trip visitors include interstate and overseas visitors to the State who are staying elsewhere and taking a daytrip to the Coonawarra / Limestone Coast region.
FIT – Free and independent traveller.

Day trip visitors to the Limestone Coast attended 5.4 cellar doors per trip in the region, on average, whilst overnight visitors attended 5.0 cellar doors and stayed for 2.5 nights on average in the region. This equates to 479,000 cellar door visits and 130,000 visitor nights in the region.

The total length of trip for overnight visitors interviewed in the Limestone Coast region (including their stay elsewhere) was 3.6 nights for SA residents, 21.5 nights for interstate residents and 65.7 nights for overseas residents.

13% of cellar door visitors interviewed in the Limestone Coast region had persons aged less than 18 in their travel party.

Figure 2.6 Adelaide Hills

The market structure for the Adelaide Hills is defined on the basis of estimated attendances provided by cellar door managers and cellar door survey results.

Day trip visitors include interstate and overseas visitors to the State who are staying elsewhere and taking a daytrip to the Adelaide Hills region.

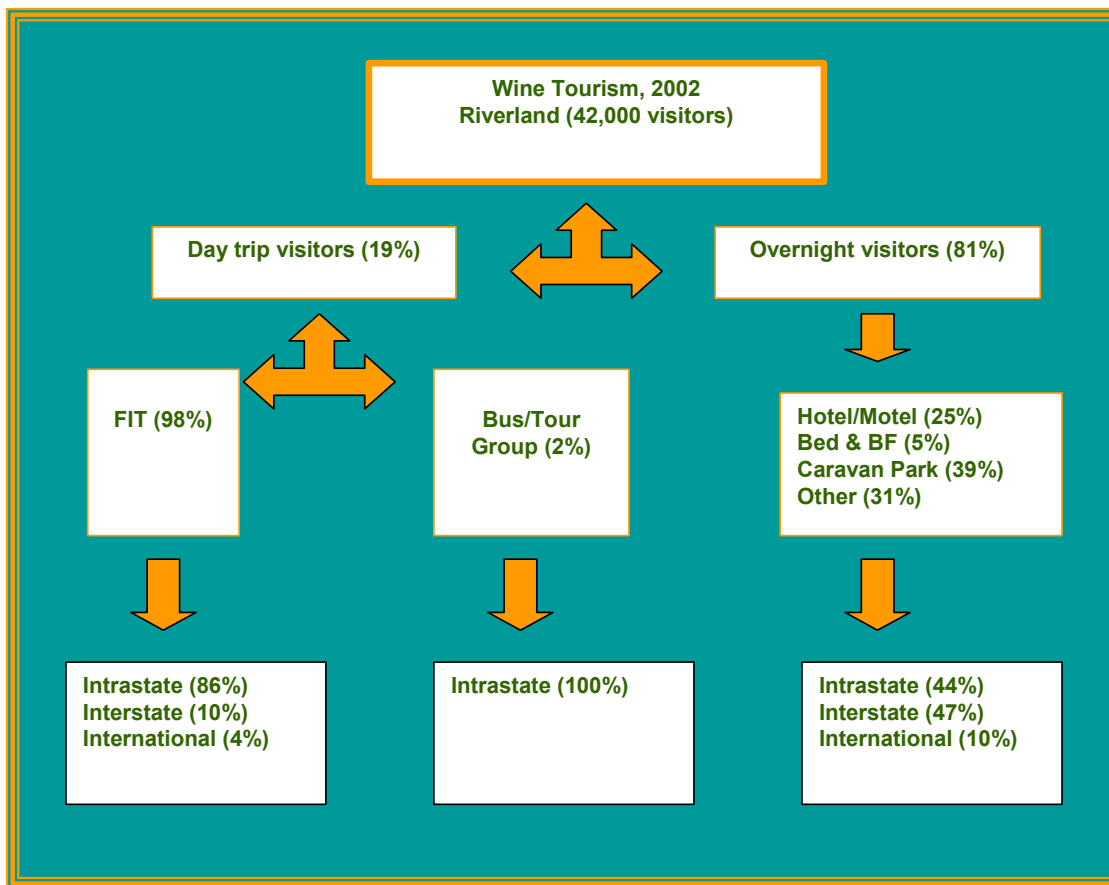
FIT – Free and independent traveller.

Winery visitors to the Adelaide Hills attended 2.3 cellar doors per trip in the region, on average, and overnight visitors stayed for 2.6 nights on average in the region.

This equates to 115,000 cellar door visits and 13,000 visitor nights in the region.

The total length of trip for overnight visitors interviewed in the Adelaide Hills (including their stay elsewhere) was 2.3 nights for SA residents and 4.1 nights for interstate residents.

7% of the cellar door visitors interviewed in the Adelaide Hills had one or more persons aged less than 18 years of age in their travel group.

Figure 2.7 Riverland

The market structure is defined on the basis of BTR benchmarks (NVS & IVS, year to June 2002) and cellar door survey results. Day trip visitors include interstate and overseas visitors to the State who are staying elsewhere and taking a daytrip to the Riverland region.
FIT – Free and independent traveller.

Daytrip visitors to the Riverland attended 1.8 cellar doors on average while overnight visitors attended 3.8 cellar doors on average and stayed for 2.9 nights in the region. This equates to a total of 144,000 cellar door visits and 99,000 visitor nights.

The total length of trip for overnight visitors interviewed in the Riverland region (including their stay elsewhere) was 3.4 nights on average for SA residents, 21.0 nights on average for interstate residents and 21.1 nights for overseas residents.

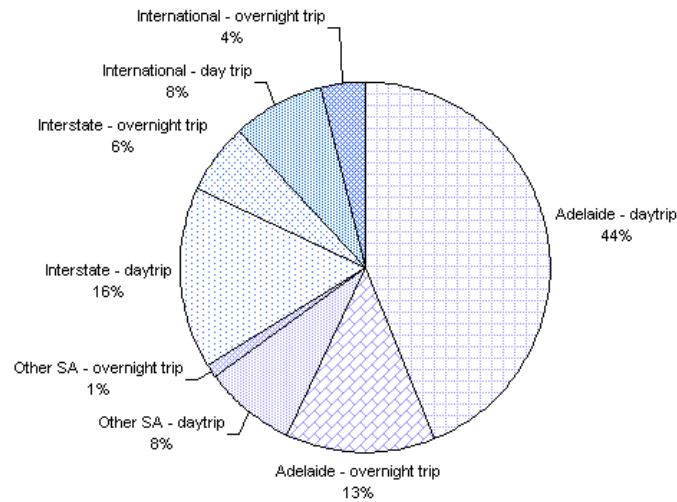
22% of the Riverland sample had children aged less than 18 years in their travel party.

Length of trip for the Riverland visitors is similar to that observed for the Limestone Coast and suggests that these regions have a greater proportion of longer stay touring and family markets when compared to the regions closer to Adelaide where the visitor profile suggests a greater influence of the short break / indulger markets.

3. VISITOR PROFILE

Survey results presented in this section of the report provide an overview of the profile of cellar door visitors.

Figure 3.1 Visitor Origin



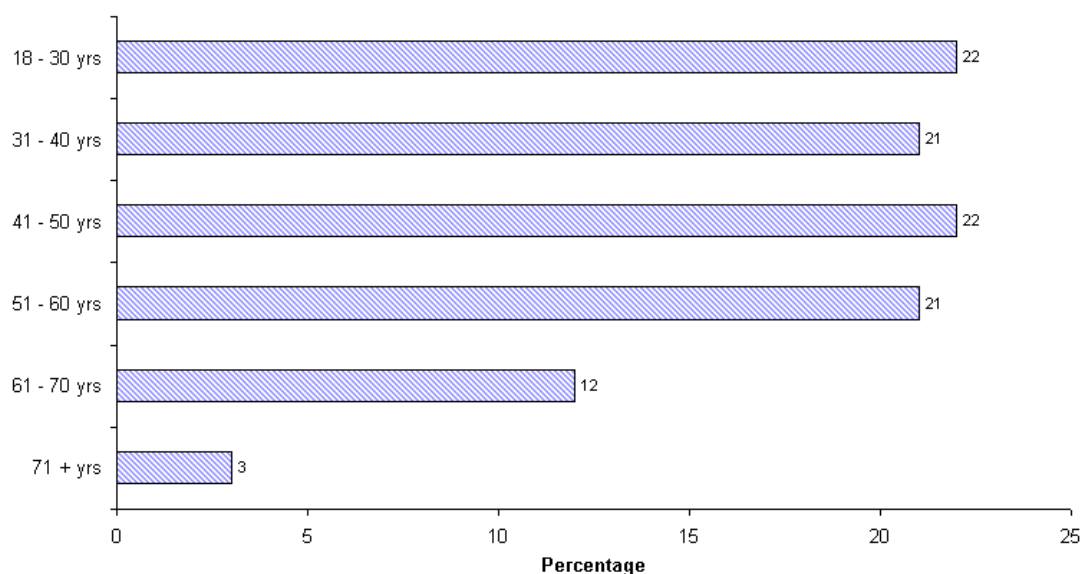
Interstate and overseas day trip visitors are those staying outside the wine regions surveyed.

Over the sample as a whole around half (52%) were South Australian residents taking a day trip to the region and 14% were South Australians staying overnight in the region. Almost one quarter (22%) were from interstate and 12% were from overseas.

Excluding South Australian day trip visitors, 46% of the respondents were resident interstate and 24% were resident overseas. In comparison, international and interstate visitors represent 37% of all overnight visitors in South Australia (BTR, NVS/IVS, 2002).

Interstate visitors were most likely to be resident in Victoria (41%) or New South Wales (32%) followed by Queensland (13%) and Western Australia (11%).

International visitors were resident in the United Kingdom (40%), followed by North America (19%), New Zealand (21%) and other Europe (17%).

Figure 3.2 Age Group

Includes day trip and overnight visitors.

The survey results presented above indicate that the sample is evenly distributed across age groups up to the age of sixty.

The distribution is generally consistent with the age distribution for all visitors however when compared to the results from the 2000 survey suggests an older age profile (64% of the cellar door visitors interviewed in 2000 were under the age of 45 years).

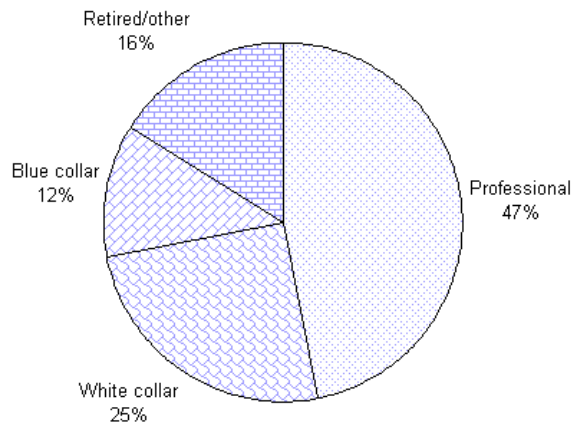
The gender distribution of the sample was 44% male and 56% female.

Table 3.1 Age Group by Origin Market

Age group	Origin Market				Total
	SA - daytrip	SA - overnight visitor	Interstate	Overseas	
18 – 30 yrs	26%	17%	13%	26%	22%
31 – 40 yrs	20%	21%	23%	26%	22%
41 – 50 yrs	23%	20%	23%	13%	21%
51 – 60 yrs	20%	27%	27%	12%	22%
61 – 70 yrs	8%	15%	12%	22%	11%
71 + yrs	4%		2%	1%	3%
Total	501,000 100%	138,000 100%	209,000 100%	112,000 100%	960,000 100%

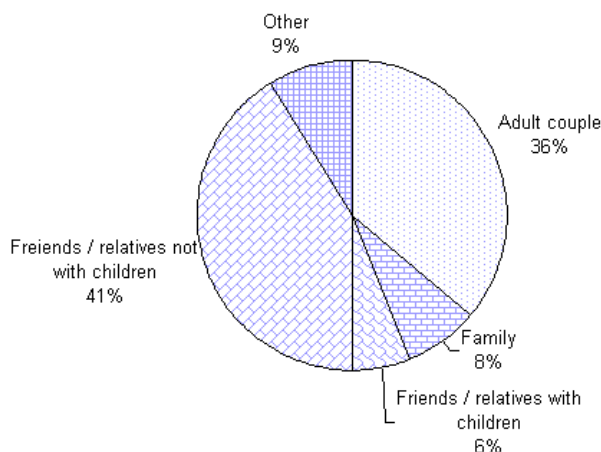
When compared on the basis of origin market, 52% of the international visitors interviewed at the cellar doors were aged between 18 and 40 years. More than two thirds (68%) of the South

Australian visitors staying overnight in the wine region were aged between 31 and 60, while 73% of the interstate visitors fell within this age range.

Figure 3.3 Occupation

Cellar door visitors were most likely to be employed in professional jobs (47% - up from 39% at the previous survey) or white collar jobs (25% - down from 33% at the previous survey).

The result suggests that when compared to the general population cellar door visitors are more likely to have higher levels of disposable income and deliver therefore a higher yield than some other tourism segments.

Figure 3.4 Travel Party

Cellar door visitors in most cases were travelling with friends / relatives without children in the travel party (41%) or a partner only (36%).

Whilst 24% of respondents had one or more child under the age of 16 living at home, only 14% of respondents had children in their travel party.

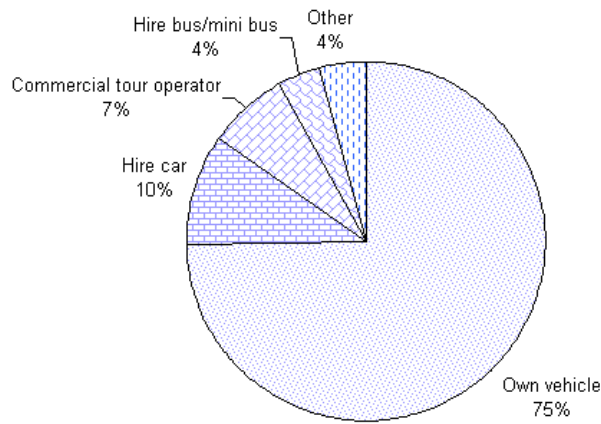
Table 3.2 Travel Party by Origin Market

	Origin Market				Total
	SA - daytrip	SA - overnight visitor	Interstate	Overseas	
No-one else	5%	5%	1%	4%	4%
Adult couple	30%	51%	42%	28%	36%
Family group – parents & children	9%	7%	11%	2%	8%
Friends / relatives with children	7%	8%	4%	3%	6%
Friends / relatives without children	45%	25%	35%	54%	41%
With business associates	1%	< 1%	7%	3%	2%
Group / club	2%	4%	<1%	3%	2%
Other	1%	<1%	<1%	2%	1%
Total	501,000 100.0%	138,000 100.0%	209,000 100.0%	112,000 100.0%	960,000 100.0%

When compared on the basis of origin market South Australians staying overnight in the region and interstate visitors were more likely to be travelling with their spouse/partner. South

Australian day-trippers and visitors from overseas were more likely to be travelling with friends or relatives.

Figure 3.5 Travel Mode

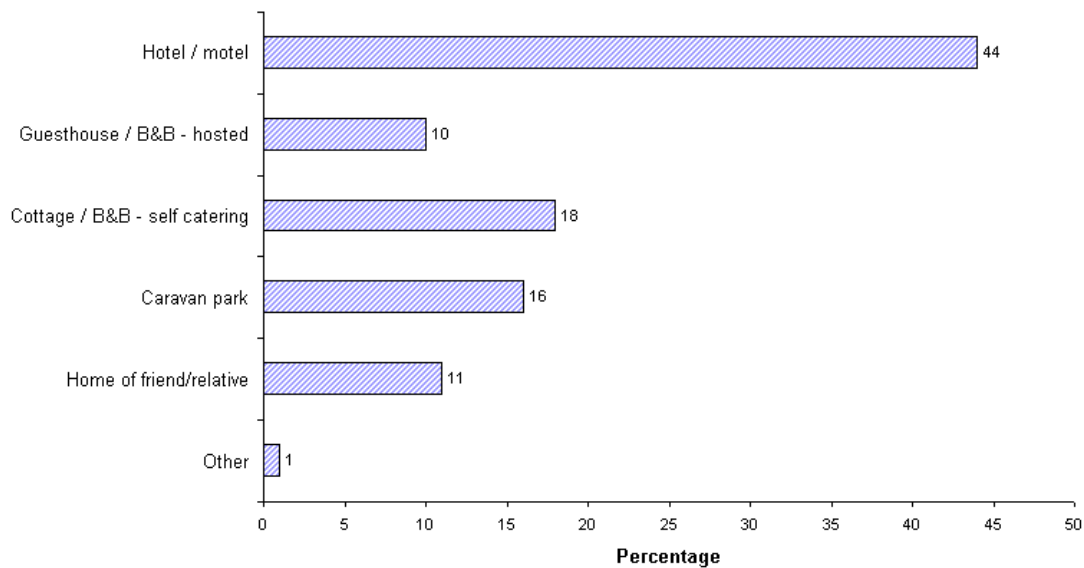


The majority of the visitors travelled to the region in their own vehicle (75%). 14% travelled independently in a hired vehicle (incl minibus) and 7% travelled with a commercial tour operator in a bus, minibus, limousine or some other vehicle.

Table 3.3 Mode of Travel by Origin Market

	Origin Market				Total
	SA - daytrip	SA - overnight visitor	Interstate	Overseas	
Own vehicle	87%	91%	49%	44%	74%
Hire car	1%	2%	28%	29%	10%
Commercial tour operator in bus/mini-bus	5%	2%	15%	8%	7%
Commercial tour operator in limo/other vehicle	1%	2%			1%
Hired bus/mini bus	3%	2%	2%	10%	4%
Train	1%		2%	3%	1%
Other	2%	2%	5%	6%	3%
Total	501,000 100.0%	138,000 100.0%	209,000 100.0%	112,000 100.0%	960,000 100.0%

When compared on the basis of origin market a substantial proportion of the interstate and overseas visitors had travelled to the region independently in a hired vehicle – incl. minibus (30% and 39% respectively).

Figure 3.6 Accommodation

Around one quarter (24%) of the sample were staying overnight in the wine region in which they were interviewed. On the basis of origin 21% of South Australian residents, 26% of interstate visitors and 33% of overseas visitors were staying overnight in the region.

The type of accommodation used was most likely to be a hotel / motel (44%), self-catering cottage / B&B (18%), caravan park (16%), home of a friend or relative (11%), and hosted guesthouse / B&B (10%).

Results of the National Visitor Survey (BTR) indicate that 10% of all domestic nights in SA in 2002 were in a guesthouse, and breakfast or self catering B&B or cottage.

4. EXPENDITURE

The average expenditure per person in South Australia over the duration of the whole trip is presented below. The whole trip includes overnight stays outside of the wine regions surveyed.

The respondents were also asked how many bottles of wine they purchased in the region. The average number of bottles purchased is also presented below in Table 4.1.

Table 4.1 Visitor Expenditure and Number of Bottles Purchased

	SA daytrip	SA overnight	Interstate	Overseas	Total
Package	\$5.8	\$38.9	\$111.3	\$259.6	\$60.3
Accommodation	NA	\$101.8	\$212.1	\$347.8	\$100.7
Food & drink – not included in accommodation	\$35.7	\$82.0	\$203.8	\$429.6	\$120.5
Travel	\$17.5	\$28.7	\$211.1	\$814.7	\$144.9
Entrance fees	\$0.7	\$14.0	\$3.4	\$29.5	\$6.4
Wine purchases at cellar doors	\$52.1	\$66.1	\$113.2	\$51.2	\$67.3
Gifts / souvenirs / clothing	\$2.6	\$5.1	\$19.5	\$91.3	\$16.0
Organised tours	\$0.9	\$6.6	\$4.7	\$20.2	\$3.7
Other	\$0.9	\$2.8	\$1.0	\$0	\$1.1
Total	\$116.20	\$340.0	\$880.1	\$2,043.9	\$520.9
Net visitors (1)	501,000	138,000	209,000	112,000	960,000
Bottles purchased at cellar door in the region of interview	3.5	5.0	5.2	2.2	4.0

Cases with a total spend of zero or more than \$15000 excluded – those with zero expenditure are assumed to be non-respondents while those with an unusually high expenditure are excluded as their expenditure may result in biased estimates.

Expenditure is per adult and includes spending on behalf of children.

The number of bottles purchased at cellar door has also been divided by the number of adults in the travel party covered by the expenditure.

1. Net visitors takes into account visits to multiple wine regions during the one trip.

After adjusting for visits to multiple regions total bottles sold is estimated to be 3.9 million.

5. CONSUMER MOTIVATION AND DECISION PROCESSES

The survey respondents were asked about their reasons for visiting the wine region in which they were interviewed. They were prompted with a number of factors that could have influenced their decision to visit the region and were asked to provide a rating between 1 and 5 to indicate the level of importance for each.

The proportion of respondents providing a rating of 5 - very important or 4 - important is presented below in Table 5.1.

Table 5.1 Reasons For Visiting the Wine Region – Multiple Response

Reason for visit	Origin Market				Total
	SA daytrip	SA overnight	Interstate	Overseas	
Recreational shopping	27%	22%	26%	22%	26%
Heritage & history	42%	40%	49%	52%	44%
Quality restaurants	57%	62%	65%	52%	59%
Wine producing area	89%	79%	85%	85%	86%
Entertain friends / visitors	53%	27%	37%	55%	46%
Wine tasting at cellar doors	82%	77%	78%	83%	81%
Experience regional food & produce	73%	64%	65%	77%	70%
To meet local winemakers	35%	39%	42%	37%	37%
Nature / wildlife	39%	34%	38%	68%	41%
To relax & unwind	91%	98%	91%	85%	91%
Lots of wineries in the area	79%	69%	84%	71%	78%
Never been here before	12%	18%	50%	68%	28%
Recommendation from others	29%	26%	47%	55%	35%
Purchase wine at cellar door	68%	64%	58%	49%	63%
Experience country/ vineyards/scenery	83%	74%	84%	90%	83%
To spend time with partner	72%	79%	73%	72%	73%
Learn more about wine	51%	46%	58%	54%	54%
Total	501,000 100.0%	138,000 100.0%	209,000 100.0%	112,000 100.0%	960,000 100.0%

Multiple Response Table – Percentages may sum to more than 100.

The factors most frequently rated as important reasons for their visit were: 'to relax and unwind' (91%), 'wine producing area' (86%), 'experience the country, vineyards, scenery' (83%), 'wine tasting at cellar door' (81%).

When compared on the basis of origin market 'to entertain visitors' was a more important reason for South Australian daytrip visitors (53%) as was purchasing wine at cellar door (68%).

For South Australians staying overnight in the region the opportunity to spend quality time with their partner was an important factor (79%) while for interstate visitors the number of wineries in the area (84%) and recommendation from others (47%) were more important. International visitors were more interested in nature / wildlife (68%), history & heritage (52%) while the recommendation of others was also more important (55%).

When asked to nominate the most important factor the most frequent responses were as follows:

- to relax and unwind (27%);
- to entertain friends and visitors from interstate / overseas (15%);
- spend time with partner (12%);
- to visit a wine producing area (10%);
- wine tasting at cellar doors (8%).

For South Australians staying overnight in the wine region 'to relax and unwind' was the most frequent response (41%) followed by 'to spend time with partner' (22%).

The respondents were also asked how important the opportunity to visit cellar doors and/or a wine area had been in their decision to visit the region. The responses are presented below in Table 5.2.

Table 5.2 Influence of Wine Region / Cellar Door on Decision to Visit

	Origin Market				Total
	SA - daytrip	SA – overnight visitor	Interstate	Overseas	
No influence	15%	19%	15%	14%	15%
Some influence	21%	35%	29%	23%	25%
Important influence	17%	20%	17%	24%	18%
Main influence	47%	27%	39%	39%	41%
Total	501,000 100.0%	138,000 100.0%	209,000 100.0%	112,000 100.0%	960,000 100.0%

Over the sample as a whole 41% of respondents suggested that the cellar door or wine related experiences had been the main reason for their visit. Overnight visitors from South Australia were less likely to cite the wine related product of the region as the main reason for visiting (27% cf 41% overall).

Sources of information accessed prior to the visit are summarised below in Table 5.3.

Table 5.3 Information Sources Prior to Visit – Multiple Response

Information sources	Origin Market				Total
	SA daytrip	SA overnight	Interstate	Overseas	
Travel agent	1%	<1%	6%	24%	5%
SA Travel Centre	7%	14%	18%	11%	11%
Friends / relatives	27%	34%	37%	36%	31%
Regional VIC	5%	4%	6%	12%	6%
In flight magazine	1%	2%	3%	2%	2%
Airline			<1%	<1%	<1%
Automobile Club	1%	10%	3%	1%	3%
Newspapers	4%	3%	2%	1%	3%
TV	5%	11%	5%	2%	5%
Radio program	2%	1%	1%		1%
Magazine	4%	9%	3%	3%	4%
Internet	4%	12%	18%	26%	11%
Tourism brochures	11%	30%	18%	21%	16%
None of these	52%	29%	30%	16%	40%
Total	501,000 100.0%	138,000 100.0%	209,000 100.0%	112,000 100.0%	960,000 100.0%

Multiple Response Table – percentages may sum to more than 100.

The most frequently mentioned information source prior to the visit was the recommendation of a friend or relative (31%), tourism brochures (16%), followed by the SA Travel Centre and the internet – both at 11%.

For SA overnight visitors an automobile club (10%) and television (11%) were more important while the SA Travel Centre was more likely to be a source of information for interstate visitors (18%). Both interstate and overseas visitors were more likely to obtain information from the internet prior to their visit (18% and 26% respectively).

The survey respondents were also asked about information sourced during their visit.

**Table 5.4 Information Sources During Visit
Multiple Response Table**

Information sources	Origin Market				Total
	SA daytrip	SA overnight	Interstate	Overseas	
Travel agent	<1%	2%	3%	6%	2%
SA Travel Centre	3%	5%	10%	21%	7%
Regional VIC	11%	20%	18%	17%	15%
Friends & relatives	7%	6%	11%	10%	8%
Word of mouth from people in the area	3%	7%	6%	13%	6%
Tourism brochures	15%	28%	25%	37%	22%
Automobile Club	<1%	2%	2%	<1%	1%
Local newspapers	2%	2%	3%	1%	2%
TV	1%	1%	<1%	<1%	1%
Radio	<1%			<1%	<1%
Local advertising	<1%	7%	3%	9%	3%
Staff at cellar door/attractions	6%	14%	11%	11%	9%
None	58%	42%	45%	34%	50%
Total	501,000 100.0%	138,000 100.0%	209,000 100.0%	112,000 100.0%	960,000 100.0%

Multiple Response Table – percentages may sum to more than 100.

Of those respondents who accessed information whilst in the region the main sources were tourism brochures (22%) and the regional visitor information centre (15%).

International visitors were more likely to have received information from a tourism brochure (37%).

Respondents were shown a number of tourist brochures and guides produced by the South Australian Tourism Commission and were asked whether they had used any of them prior to or during their trip.

**Table 5.5 Used Tourist Brochures Prior To or During Trip
Multiple Response Table**

Tourism publications	Origin Market				Total
	SA daytrip	SA overnight	Interstate	Overseas	
Secrets wine region glove box guide	15%	24%	14%	21%	17%
Shorts brochure	24%	34%	12%	9%	21%
Wine Trail brochures	10%	20%	17%	12%	13%
Secrets unwinding roads guide	10%	15%	9%	17%	11%
None	69%	42%	65%	64%	64%
Total	501,000 100.0%	138,000 100.0%	209,000 100.0%	112,000 100.0%	960,000 100.0%

Multiple response – percentages sum to more than 100.

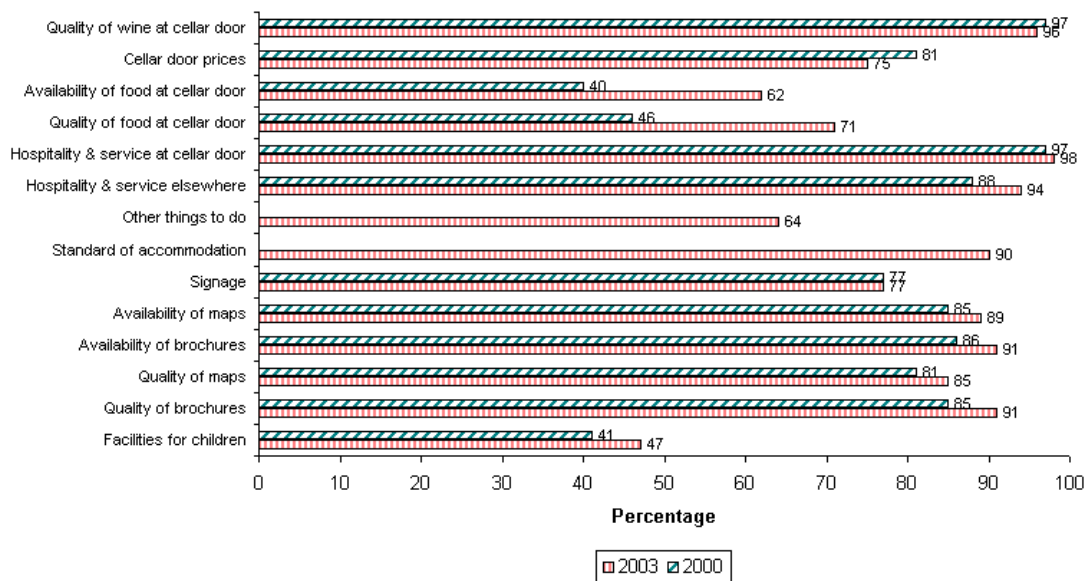
The Shorts brochure was recognised by the largest number of respondents (21%) followed by the Secrets guide to SA's wine regions (17%) and the wine trails brochures (13%).

More than one third (34%) of the overnight visitors from SA had used the Shorts brochure.

6. SATISFACTION WITH VISIT

As a component of the cellar door interviews the respondents were asked to provide a rating to indicate their level of satisfaction with various aspects of the wine tourism experience. The proportion of respondents providing a satisfaction rating of 4 or 5 (from a maximum score of 5) is presented below in Table 6.1. Where applicable the level of satisfaction recorded at the survey undertaken in 2000 is also included.

Figure 6.1 Satisfaction With the Wine Tourism Experience



Percentage base excludes not applicable cases.

Aspects of the wine tourism experience associated with lower levels of satisfaction at the 2003 survey were: facilities for children (47% satisfied), availability of food at cellar door (62%), other things to do (64%) and quality of food at cellar door (71% satisfied).

When compared to the results of the survey conducted in 2000 there has been a substantial improvement in satisfaction levels regarding availability of food at cellar door (up from 40% to 62%) and quality of food at cellar doors (up from 46% to 71%).

Improvement was also noted with respect to facilities for children; the standard of hospitality and service elsewhere in the region; and both the availability and quality of maps and brochures.

Table 6.1 Likelihood of Return Visit

	Origin Market				Total
	SA daytrip	SA overnight	Interstate	Overseas	
Extremely unlikely	< 1%	<1%	7%	11%	3%
Somewhat unlikely	1%	<1%	6%	17%	4%
Neither likely nor unlikely	<1%	2%	8%	19%	4%
Somewhat likely	9%	21%	37%	38%	20%
Extremely likely	89%	75%	43%	15%	68%
Total	501,000 100.0%	138,000 100.0%	209,000 100.0%	112,000 100.0%	960,000 100.0%

As might be expected almost all of the South Australian residents expected they would return to the region at some time in the future. 80% of interstate and 53% of the international visitors suggested that they would be likely to revisit the region.

Table 6.2 Would Recommend Region to Family and Friends

	Origin Market				Total
	SA daytrip	SA overnight	Interstate	Overseas	
Extremely unlikely	< 1%	< 1%	< 1%		< 1%
Somewhat unlikely	1%	1%	1%	1%	1%
Neither likely nor unlikely		1%	1%	2%	1%
Somewhat likely	8%	12%	19%	13%	11%
Extremely likely	90%	86%	78%	84%	86%
Total	501,000 100.0%	138,000 100.0%	209,000 100.0%	112,000 100.0%	960,000 100.0%

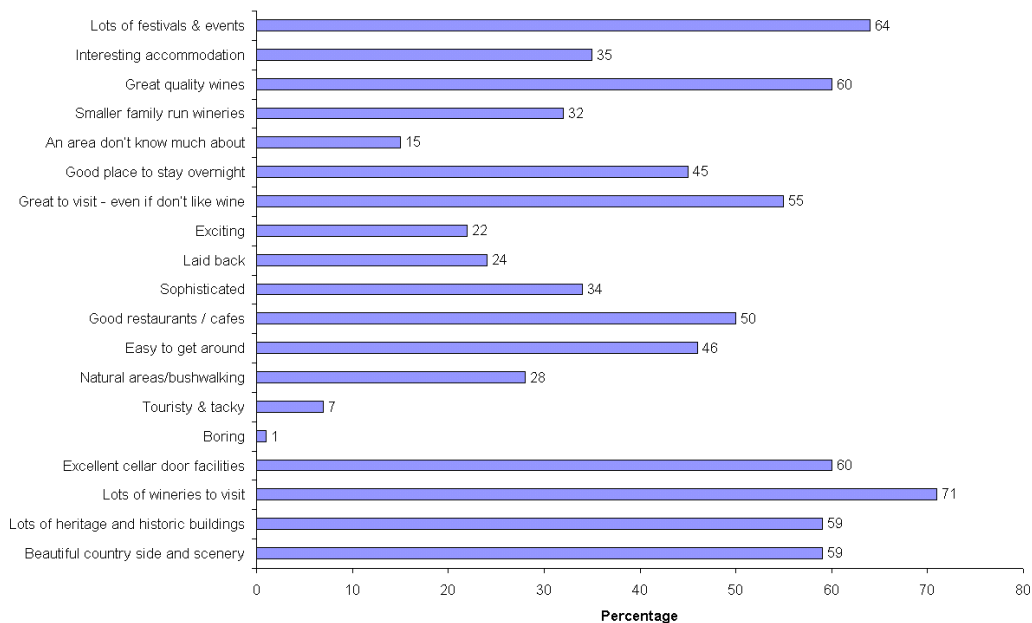
The overwhelming majority of visitors would also recommend the region visited to friends and relatives.

7. IMAGE OF SOUTH AUSTRALIAN WINE REGIONS

As a component of the cellar door interviews respondents were prompted with a number of descriptive adjectives and phrases and were asked which of nine wine regions they would associate with each descriptor. The wine regions included the Yarra Valley, Hunter Valley and Margaret River in addition to the six South Australian regions. The percentage of respondents who associated each descriptor with each region is presented below in Table 7.1.

Table 7.1 Perception of Wine Regions

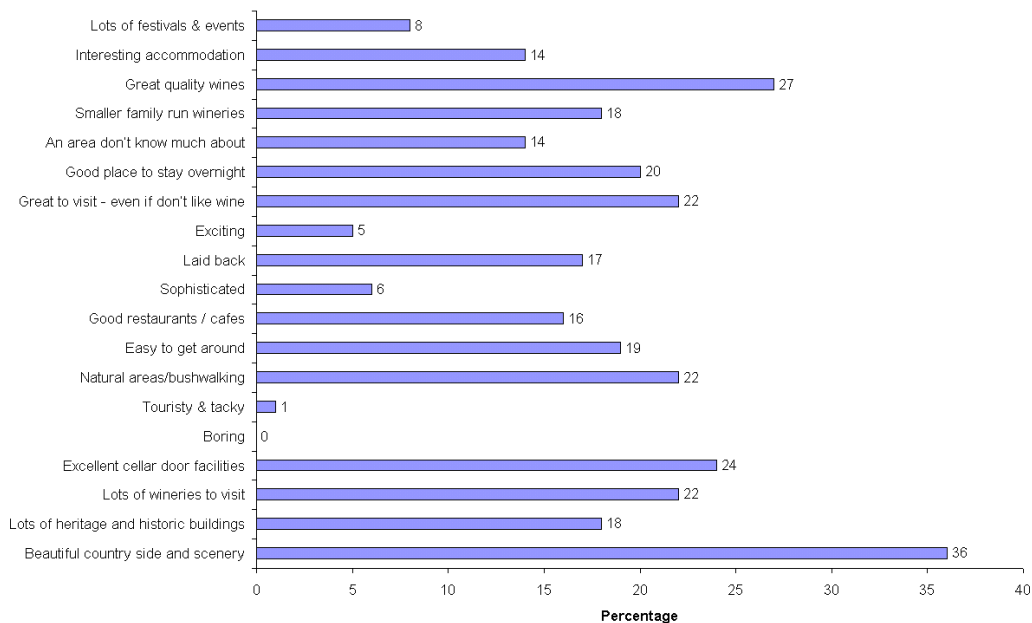
	Clare Valley	Yarra Valley	Hunter Valley	Barossa	Margaret River	Limestone Coast	Riverland	Adelaide Hills	McLaren Vale
Beautiful country side and scenery	36%	12%	12%	59%	13%	10%	5%	15%	29%
Lots of heritage and historical buildings	18%	3%	5%	59%	2%	4%	1%	7%	11%
Lots of wineries to visit	22%	5%	12%	71%	7%	12%	4%	7%	32%
Excellent cellar door facilities	24%	5%	10%	60%	6%	12%	4%	8%	32%
Boring	0%	0%	1%	1%	1%	1%	3%	0%	1%
Touristy & tacky	1%	1%	3%	7%	1%	0%	1%	1%	1%
Natural areas/bushwalking	22%	4%	5%	28%	7%	2%	2%	6%	16%
Easy to get around	19%	5%	9%	46%	5%	11%	4%	8%	28%
Good restaurants / cafes	16%	5%	8%	50%	5%	5%	2%	7%	24%
Sophisticated	6%	3%	7%	34%	3%	3%	1%	5%	8%
Laid back	17%	4%	5%	24%	4%	8%	4%	6%	25%
Exciting	5%	3%	4%	22%	2%	2%	2%	2%	8%
Great to visit - even if don't like wine	22%	5%	8%	55%	10%	11%	4%	10%	26%
Good place to stay overnight	20%	5%	8%	45%	6%	8%	4%	5%	15%
An area don't know much about	14%	32%	24%	15%	27%	25%	23%	13%	12%
Smaller family run wineries	18%	2%	4%	32%	4%	6%	1%	4%	21%
Great quality wines	27%	9%	13%	60%	13%	17%	5%	13%	34%
Interesting accommodation	14%	2%	4%	35%	2%	5%	1%	3%	9%
Lots of festivals & events	8%	2%	5%	64%	2%	2%	1%	3%	22%

Figure 7.1 Barossa

The Barossa is the premium wine region in South Australia with high levels of awareness and strong associations across a wide range of destination attributes.

The more common associations were:

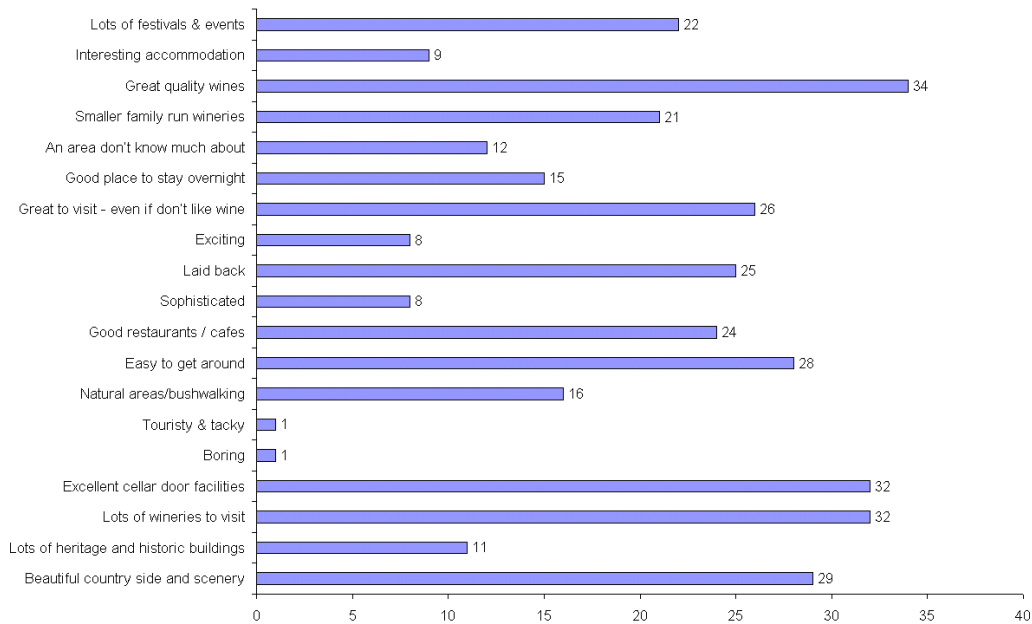
- the number of wineries (71%);
- excellent cellar door facilities (60%);
- festivals and events (60%);
- quality wine (60%);
- heritage and historic buildings (59%);
- beautiful scenery (59%);
- great place to visit – even if don't like wine (55%);
- good restaurants and cafes (50%).

Figure 7.2 Clare Valley

While overall awareness levels are not as strong for the Clare Valley when compared to the Barossa, the area is associated with beautiful countryside (36%) and nature based activities (22%) in addition to the wineries and cellar door facilities. The strength of these attributes suggests an opportunity to link with nature based product.

The profile is relatively even with heritage and historic buildings, a good place to stay overnight and restaurants and cafes well represented.

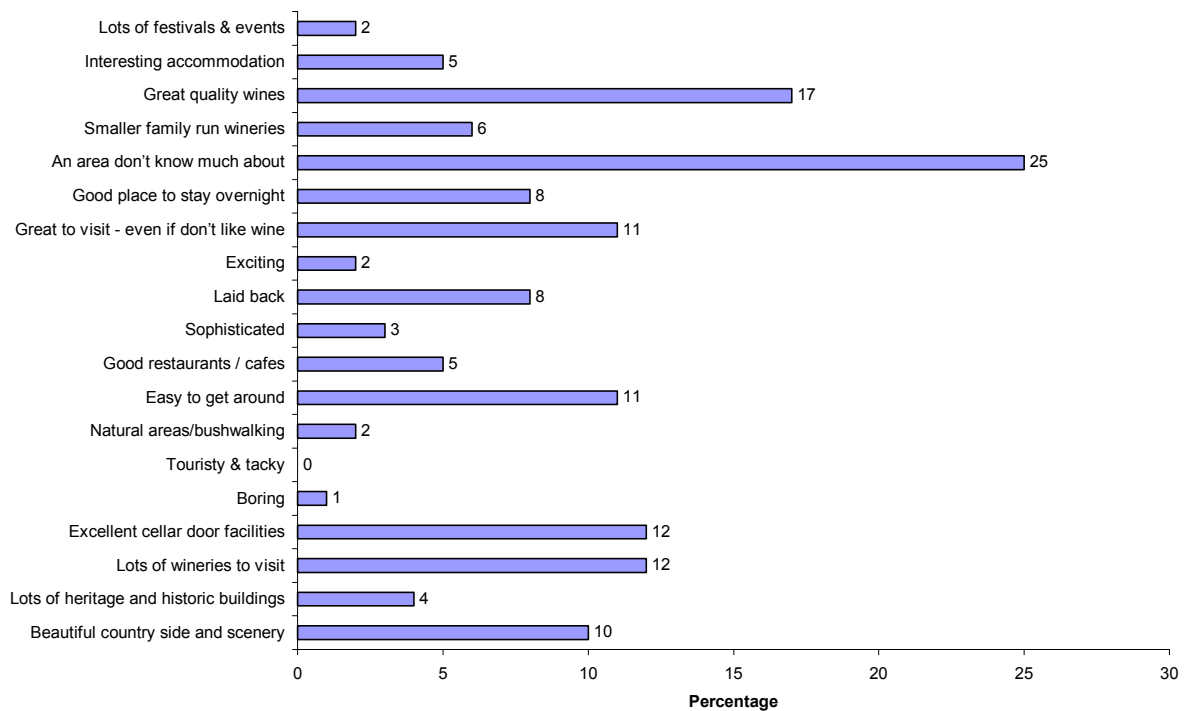
Given the range of interesting heritage accommodation in the region greater emphasis could perhaps be placed on raising awareness of these attributes through marketing activity in the future.

Figure 7.3 McLaren Vale / Fleurieu Peninsula

The McLaren Vale / Fleurieu Peninsula region has high levels of awareness with great quality wines (34%), excellent cellar door facilities (32%) and lots of wineries (32%) the strongest associations.

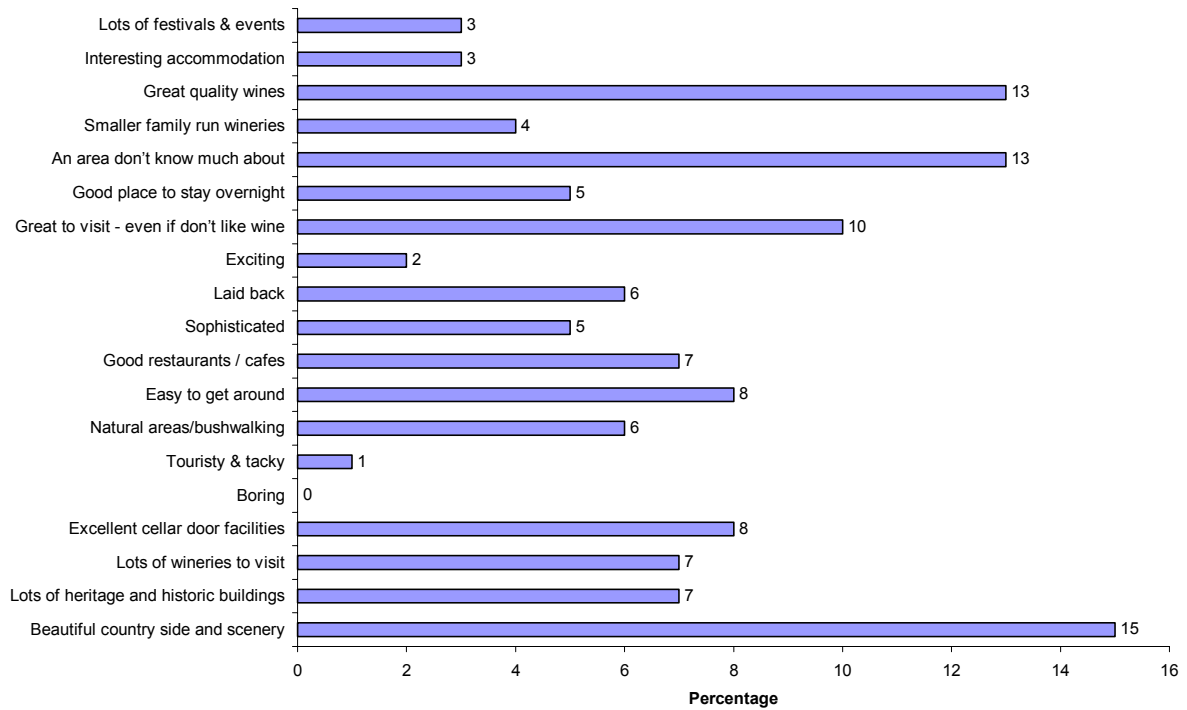
The region is also associated with beautiful scenery (29%), restaurants / cafes (24%), festivals and events (22%), smaller family run wineries (21%) and is regarded as laid back (25%).

The region has significant potential to develop a regional food positioning and to leverage the numerous recreational opportunities on the Fleurieu Peninsula.

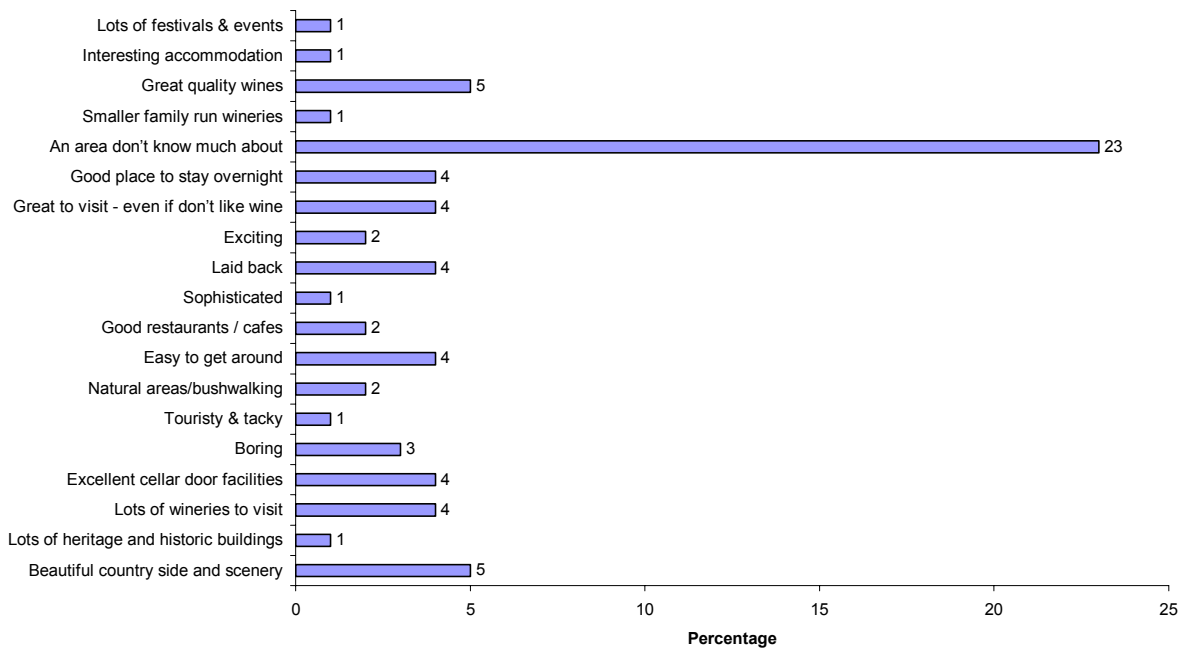
Figure 7.4 Coonawarra / Limestone Coast

The Limestone Coast / Coonawarra region has lower levels of awareness compared to the Barossa, Clare Valley and Fleurieu and respondents were most likely to associate the region with the statement 'an area I don't know much about' (25%).

The quality of wine is a relative strength (17%) but this is not matched by an association with 'excellent cellar door facilities' (12%) or 'lots of wineries to visit' (12%) to the same extent.

Figure 7.5 Adelaide Hills

Awareness for the Adelaide Hills is also not strong although it rates well for beautiful country side and scenery when compared to the other attributes suggesting an opportunity to link with nature based activities in developing and promoting the region.

Figure 7.6 Riverland

The Riverland has poor awareness levels as a wine region and few distinguishing features however the foundation provided by Banrock Station represents an opportunity to establish a unique positioning incorporating the River Murray.